Approvals Quick Reference

Locate Requisitions to be Approved

- Click on the **Action Items** (flag) icon at the top right of the screen.
- OR:
  - Click on the **Orders and Documents** icon on the left side of the screen. Choose Approvals and My Approvals.
  - If you’d like, you can **filter** (to the left) or **sort** (at the top) the list.

Review/Approve Requisitions

- **To approve within the list**, check the box next to the Requisition and choose Approve/Complete from the drop-down menu.
  
  ![Image of Approve/Complete option]

- **To review the Requisition first**, open the Requisition by clicking on the Requisition number.

  ![Image of Requisition number]

- **Assign the Requisition to yourself** by clicking “Document Actions” at the top of the screen, then choosing “Assign to myself.” If you’d like to **unassign** the Requisition, click “Document Actions” and choose “Return to Shared Folder.”

  ![Image of Document Actions]

  ![Image of Unassign action]
• To add/send a comment, click on Comments on the left side of the screen, then click Add Comment. You can also attach a file to the Requisition here.

• If necessary, return the Requisition to the Requester for corrections. Click “Document Actions” at the top, then choose “Return to Requisitioner.”

• To approve the Requisition, click “Document Actions” at the top, then choose one of the Approve options.

• To reject the entire Requisition, click “Document Actions” and choose “Reject Requisition.”

• To reject an individual line item scroll down to the line item and put a check in the box to the right.

Then click “Selected Line Item Actions” at the top of the line item list and choose “Reject Selected Items.”