Approvals Quick Reference



Locate Requisitions to be Approved

• Click on the Action Items (flag) icon at the top right of the screen.

OR:

Fiscal Approver UC Davis 🔻

Click on the **Orders and Documents** icon on the left side of the screen. Choose Approvals and My Approvals.

* 2		
Î	Document Search Approvals	Approvals My Approvals Approval Notifications My Recent Approvals

• If you'd like, you can **filter** (to the left) or **sort** (at the top) the list.

Filter My Approvals	?		Document Actions 🔻 History 🚔 ?	Document Actions 🔻 History 🚔
Date Range		Sort by: Folder Entry date newest first	Assign to myself	Approve/Complete & Show Next
All Dates			Approve/complete step & show next	Approve/Complete Step
Supplier	₩.		Approve/complete step	Return to Shared Folder
Office Max (21) VWR International (16)				Deturn to Dequisitioner

📜 253.43 USD



Review/Approve Requisitions

• **To approve within the list**, check the box next to the Requisition and choose Approve/Complete from the drop-down menu.



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



Approvals Quick Reference

• 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.

Requisition: 1560826	Comments		Decument Actions 🗢 History 🚔
Satus. Pending Document Total: 14.29 USD	Show comments for	Requisition	Add Comment
Requisition >	Records found: 0		
	No comments have been a	dded	
Comments			

• 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."

Document Actions History		
Approve/Complete & Show Next		
Approve/Complete Step		
Return to Shared Folder		
Return to Requisitioner		
Copy to New Cart		
Add Comment		
Add Notes to History		
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."

