APPROVAL OVERVIEW

In eSHOP, requisitions are moved to workflow queues or folders and approvers are assigned to those folders based on the funding assigned to that requisition. Multiple approvers may be assigned to the same folder. Each approver will be notified via email when a requisition has been submitted for their approval.

EMAILS

If you are an approver, you will by default receive an email notification to your campus email account notifying you when a new requisition is pending your approval. You can approve or reject the requisition directly from your email, or you can log into eSHOP to view the requisition. If you wish to partially reject a Requisition, you will need to do so in eSHOP.

APPROVALS FOLDERS

Action Items and Notifications can be found on the Banner. You can also view any requisitions needing your approval by hovering over the icon on the left side navigation bar. When the fly-out menu appears, click on Approvals, then My Approvals.

To review the requisitions awaiting approval, click the Action Items link on the Banner or navigate to My Approvals (as listed above).

There are two views available for your Approvals screen: Folders or List. The Folders view groups the Requisitions by folder. Click on any of the folders to view the Requisitions.

The shared folders contain Requisitions that have not yet been assigned. Requisitions that have been assigned to you will show in your My PR Approvals folder.

The List view groups all the Requisitions together sorted by Requisition number.

APPROVING REQUISITIONS

Because multiple users may be assigned to the same approval folder and to avoid duplication of effort, follow these steps for reviewing and approving requisitions:

1. Click the Assign button next to the Requisition you wish to review.
2. That Requisition will now appear in your My PR Approvals folder and will no longer show in the shared folders.
3. Click the Requisition number to open the Requisition.
4. To approve the Requisition after reviewing it, select “Approve/Complete Step” from the Available Actions drop-down at the top of the screen and click Go.

REJECTING REQUISITIONS

You may reject an entire Requisition or individual line items of a multi-line Requisition. You should only reject a Requisition if you want to cancel it completely. If only changes are needed, choose the Return option shown below.

1. Click the Assign button next to the Requisition you wish to review.
2. The Requisition will now appear in your My PR Approvals folder and will no longer show in the shared folders.
3. Click the Requisition number to open the Requisition.
4. Scroll down to the lines of the Requisition and click the box next to the line(s) you wish to reject.
5. Select “Reject Selected Items” from the drop-down above the first line and click Go.
6. You may now enter a reason for the rejection, which will be saved on the Requisition for the user to see. Enter the reason and click

RETURNING REQUISITIONS

If you are reviewing a Requisition and determine it requires changes before approvals, you can return it to the requisitioner so they can make changes and resubmit it.

1. Click the Assign button next to the Requisition you wish to review.
2. The Requisition will now appear in your My PR Approvals folder and will no longer show in the shared folders.
3. Click the Requisition number to open the Requisition.
4. Select “Return to Requisitioner” option from the Available Actions drop-down menu at the top of the screen and click Go.