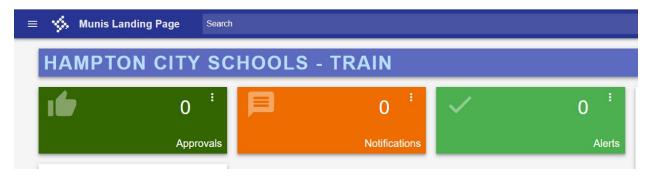# USE CHROME WEB BROWSER ONLY
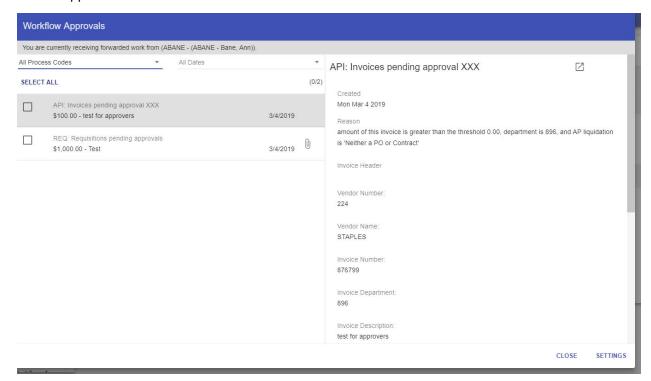
To Approve any items

Complete this procedure to approve or reject any function approval *sent to you for action.*

1. Click the **Approvals tile** on the Dashboard.

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Approvals	Notifications	Alerts

2. There may be multiple items for your approval and the codes will identify what type of approvals is needed

Workflow Approvals

You are currently receiving forwarded work from (ABANE - (ABANE - Bane, Ann)).

All Process Codes ▾	All Dates ▾

SELECT ALL   (0/2)

☐	API: Invoices pending approval XXX $100.00 - test for approvers	3/4/2019
☐	REQ: Requisitions pending approvals $1,000.00 - Test	3/4/2019 📎

API: Invoices pending approval XXX   ⧉

Created
Mon Mar 4 2019

Reason
amount of this invoice is greater than the threshold 0.00, department is 896, and AP liquidation is 'Neither a PO or Contract'

Invoice Header

Vendor Number:
224

Vendor Name:
STAPLES

Invoice Number:
876799

Invoice Department:
896

Invoice Description:
test for approvers

CLOSE   SETTINGS
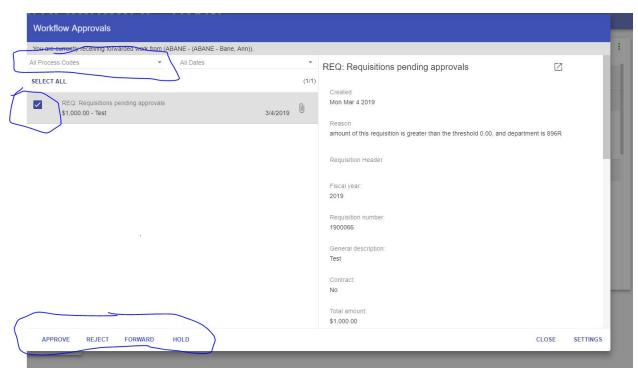
The codes you may see are as follows:

API = AP invoice that is not linked to a Purchase Order.

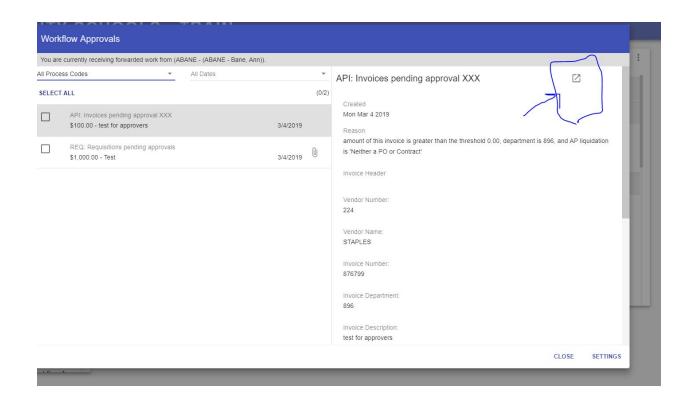**POM** = Change order to a Purchase Order.

REQ = Requisition that will convert to a Purchase Order.

BGT = Budget transfer request

From the approvals tile on your dashboard you can filter the type of approvals by selecting the pull down box next to **ALL PROCESS CODES**.
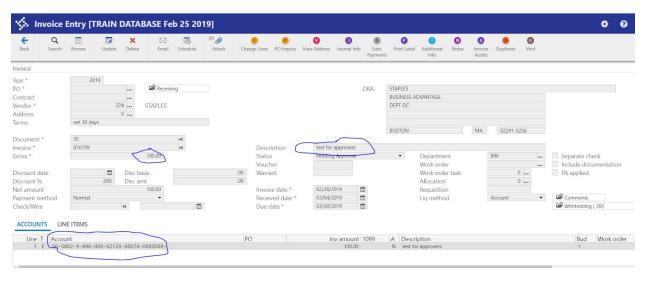

3. You can see some of the details about the document by scrolling on the right side of the screen. However, to open the document that you are approving, click in the check box next to the document, then click the box with the arrow on the right side of the window.
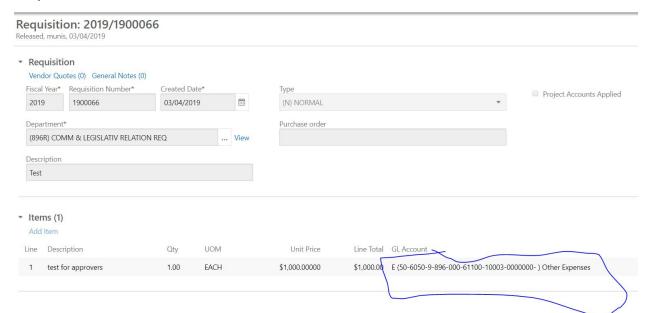
Workflow Approvals

You are currently receiving forwarded work from (ABANE - (ABANE - Bane, Ann)).

All Process Codes ▾	All Dates ▾

SELECT ALL   (0/2)

☐ API: Invoices pending approval XXX
   $100.00 - test for approvers   3/4/2019

☐ REQ: Requisitions pending approvals
   $1,000.00 - Test   3/4/2019

API: Invoices pending approval XXX

Created
Mon Mar 4 2019

Reason
amount of this invoice is greater than the threshold 0.00, department is 896, and AP liquidation is 'Neither a PO or Contract'

Invoice Header

Vendor Number:
224

Vendor Name:
STAPLES

Invoice Number:
876799

Invoice Department:
896

Invoice Description:
test for approvers

CLOSE   SETTINGS

Before approving, you are looking at the following:

API - The correct GL account is being charged and you approve of the expense. Documentation is attached.

POM - A change order to a purchase order. The correct GL account is being charged and you approve of the expense. Click **Audits** to view the History of Changes.

REQ - The correct GL account is being charged and you approve of the expense. Documentation is attached.

BGT - A budget transfer request approving both the GL and the budget changes.
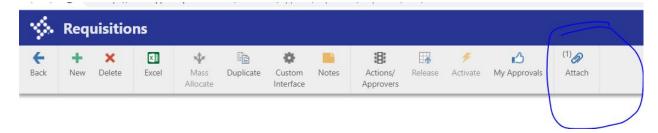
Sample API

Sample REQ

Requisition: 2019/1900066
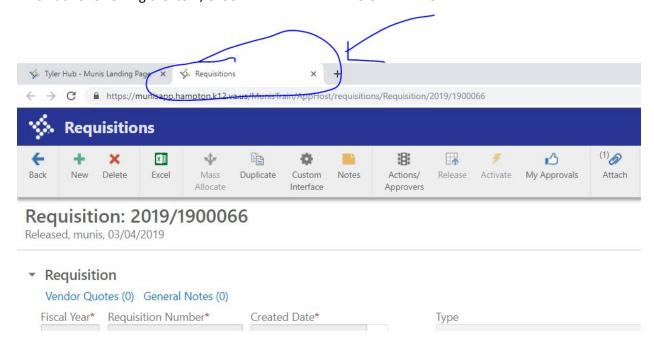Released, munis, 03/04/2019

If you want the vendor information double click on the item line.

From ANY item viewed, there will be an ATTACH button on the top ribbon. Click on this to view the attachments to the transaction.
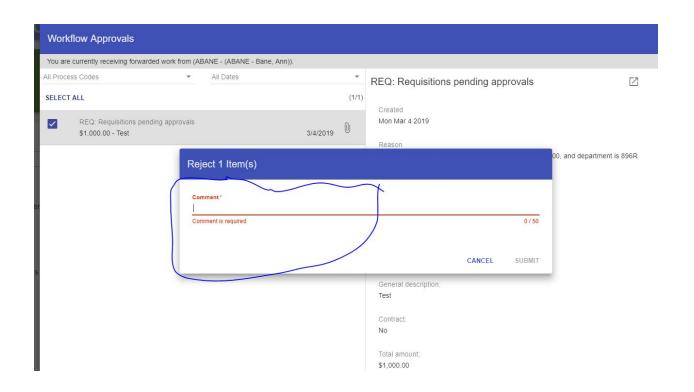
When done reviewing the item, CLOSE THE TAB THAT WAS OPENED FOR THE REVIEW.

Make sure the box is checked next to the item you are about to approve or reject.

4. Click one of the buttons at the bottom to either Approve, Reject or Forward.
   a. **Approve** if ok
   b. **Reject** to deny - A comment is required for a rejection.
   c. **Forward** to send to another approver for review.
   d. **Hold** to keep in your Approvals tile

There is an entry box that appears which must be completed if you are rejecting or forwarding. Enter the reason you are rejecting or forwarding.
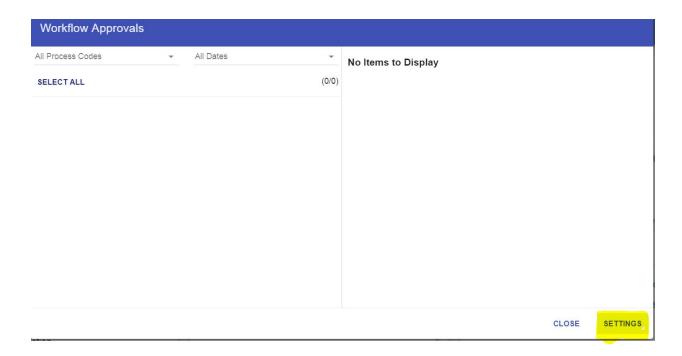
FORWARDING APPROVALS

If you will be out on extended leave you can forward your approvals.

Open your Approvals Box.

The following box will appear:

Select **Settings**.

Select the Approver and the Start and End Date.

Save