MUNIS Approvers

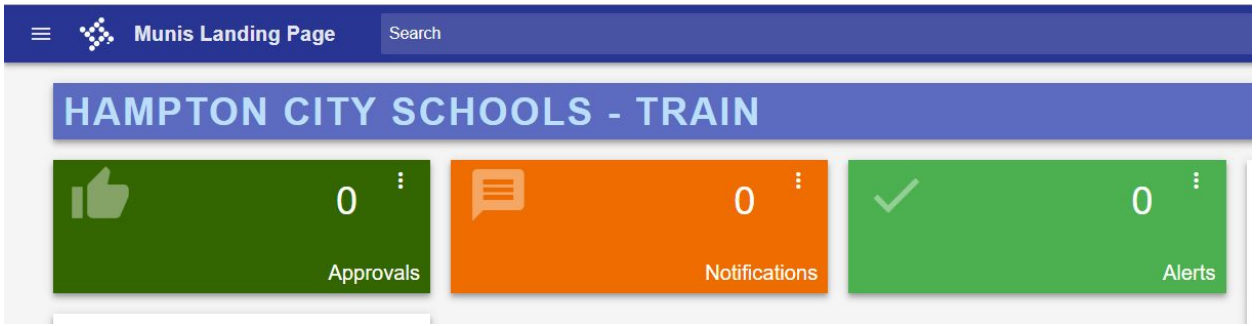
Hampton City Schools Cheat Sheet

USE CHROME WEB BROWSER ONLY

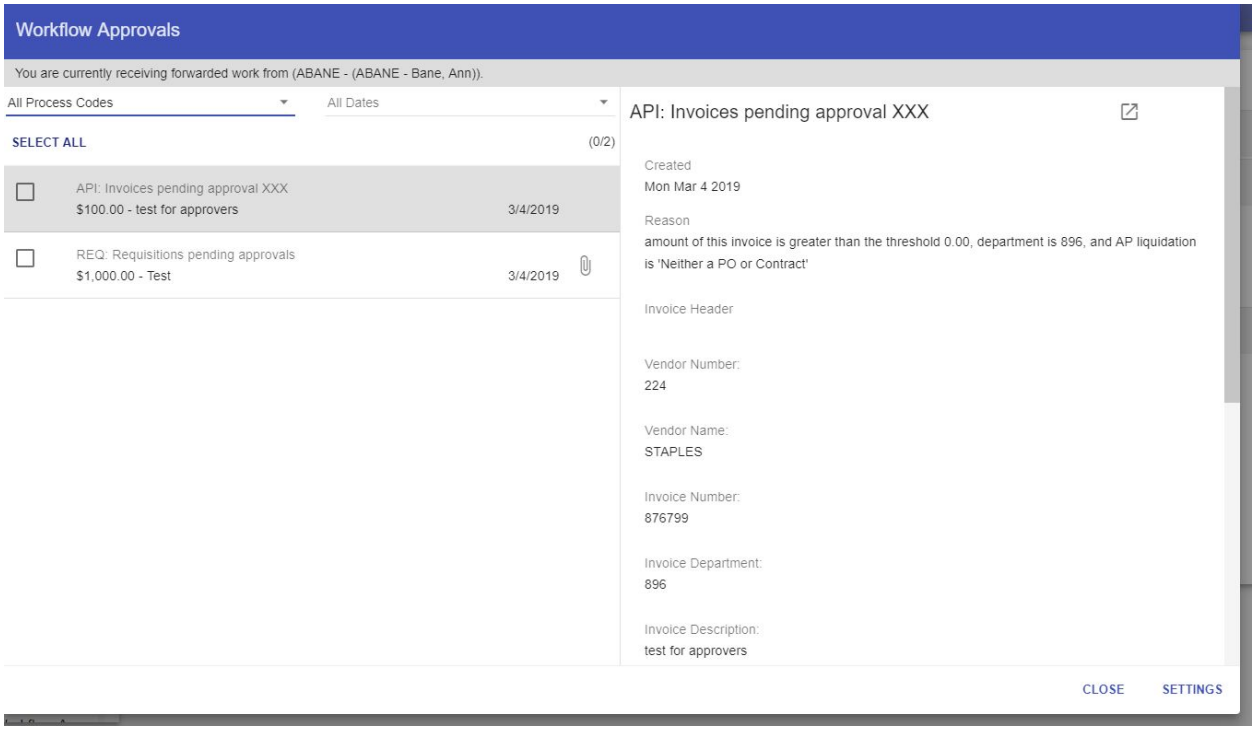
To Approve any items

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

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



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



The codes you may see are as follows:

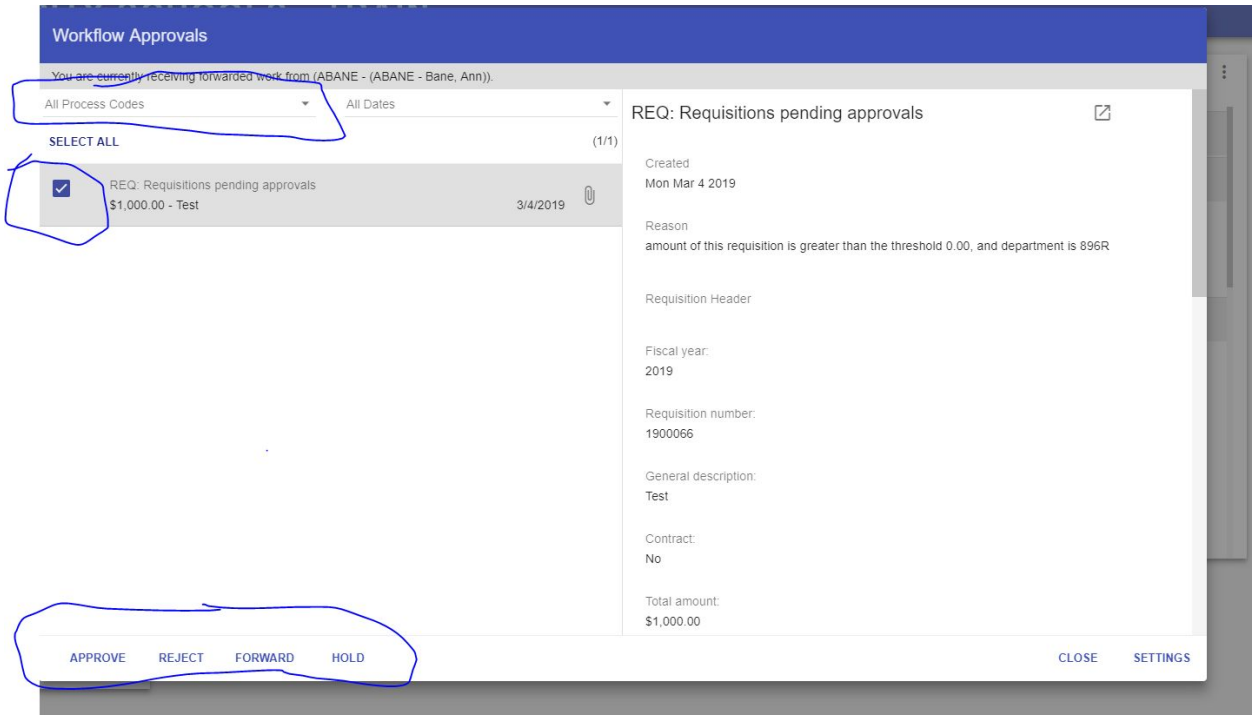
API = AP invoice that is not linked to a Purchase Order.

POM = Change order to a Purchase Order.

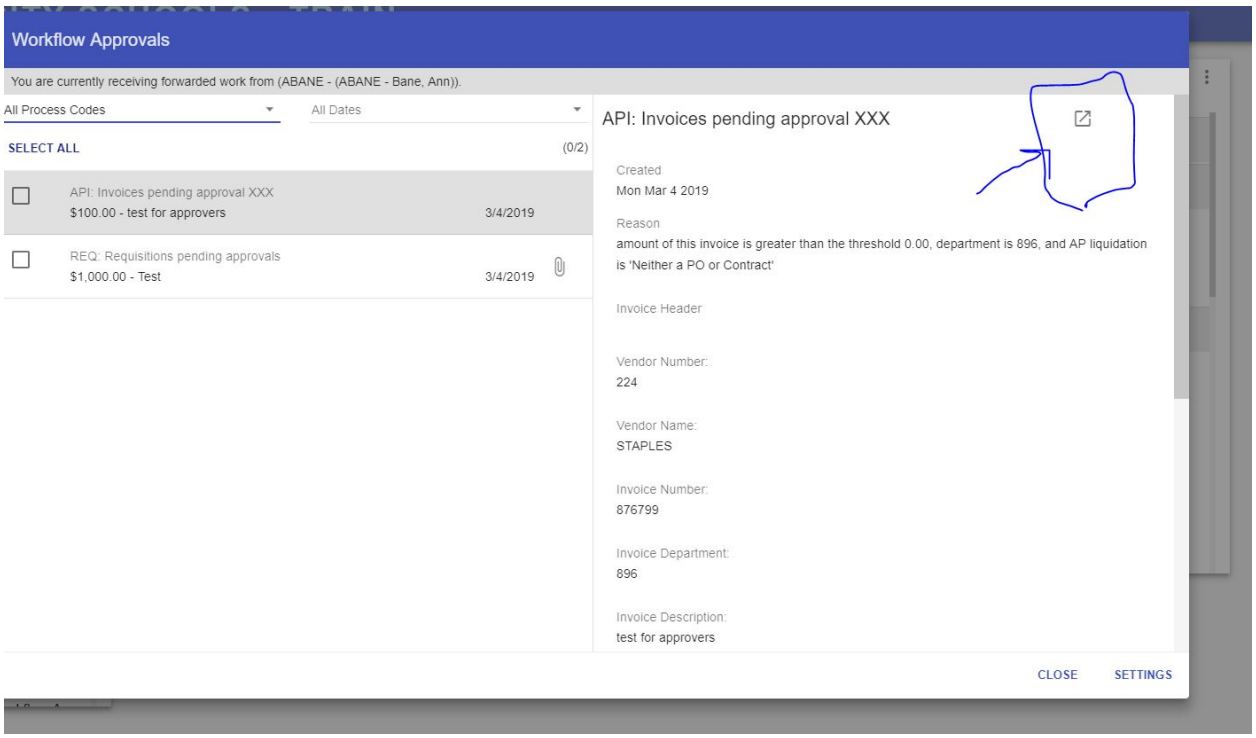
REQ = Requisition that will convert to a Purchase Order.

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.



Before approving, you are looking at the following:

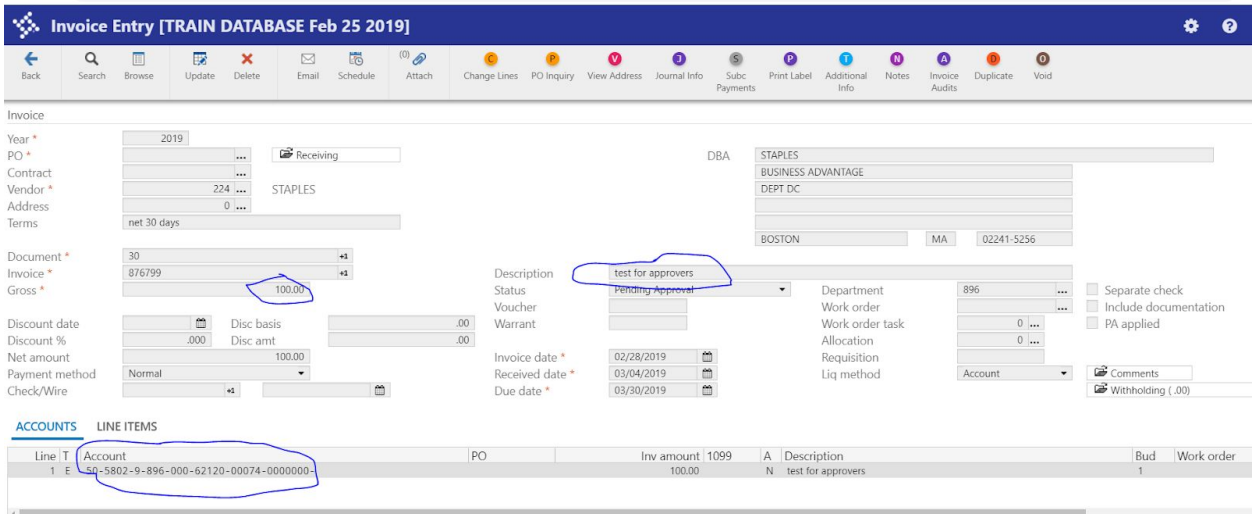
API - The correct GL account is being charged and you approve of the expense. Documentation is attached.

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.

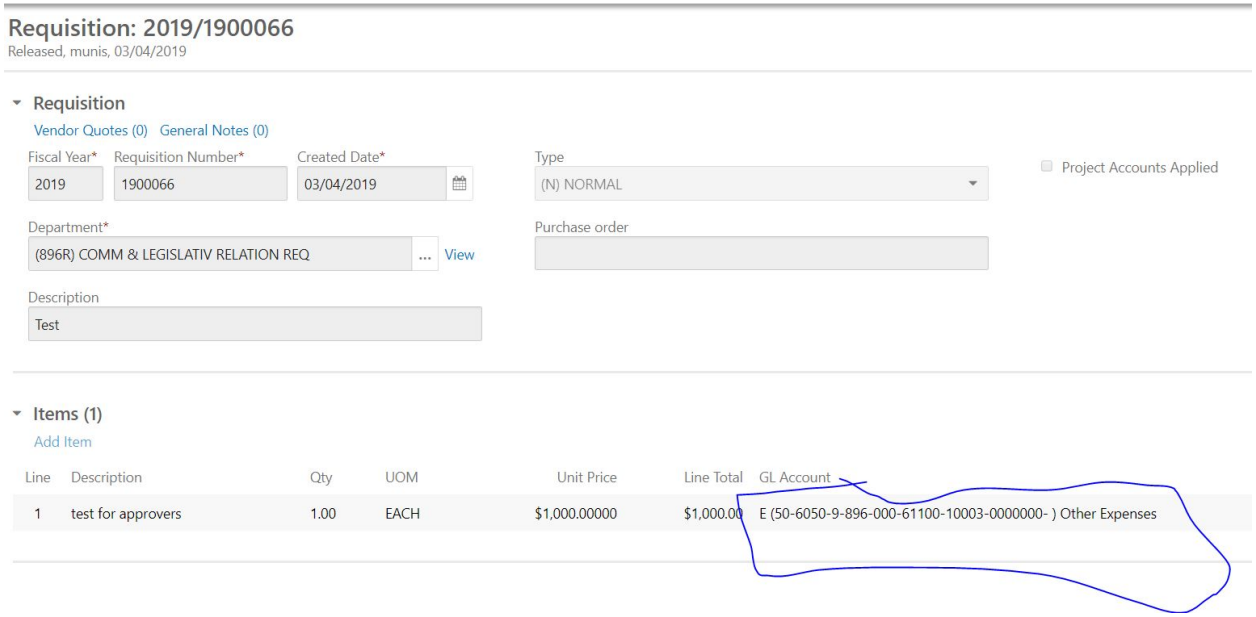
REQ - The correct GL account is being charged and you approve of the expense. Documentation is attached.

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

Sample API

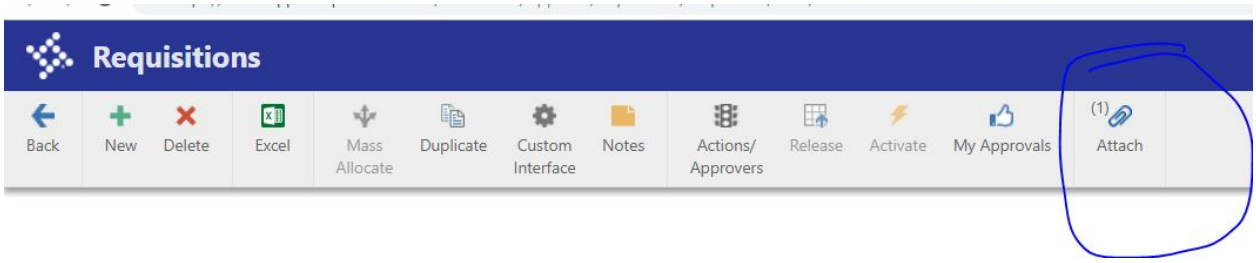


Sample REQ

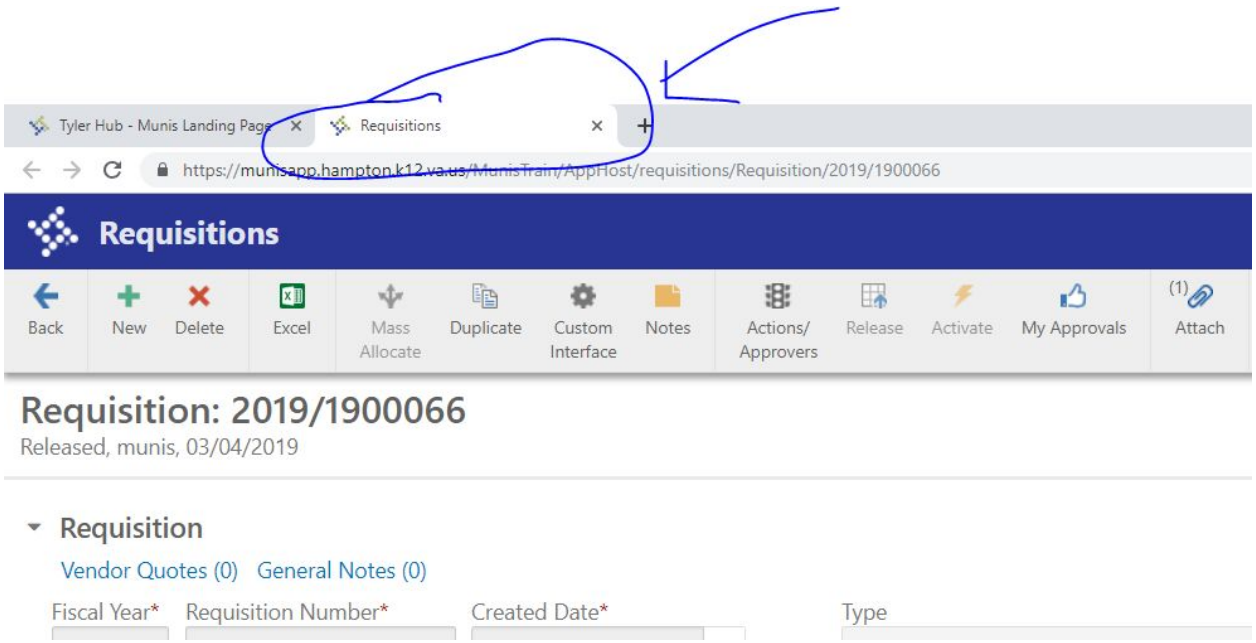


If you want the vendor information double click on the item line.

From ANY item viewed, there will be an ATTACH button on the top ribbon. Click on this to view the attachments to the transaction.



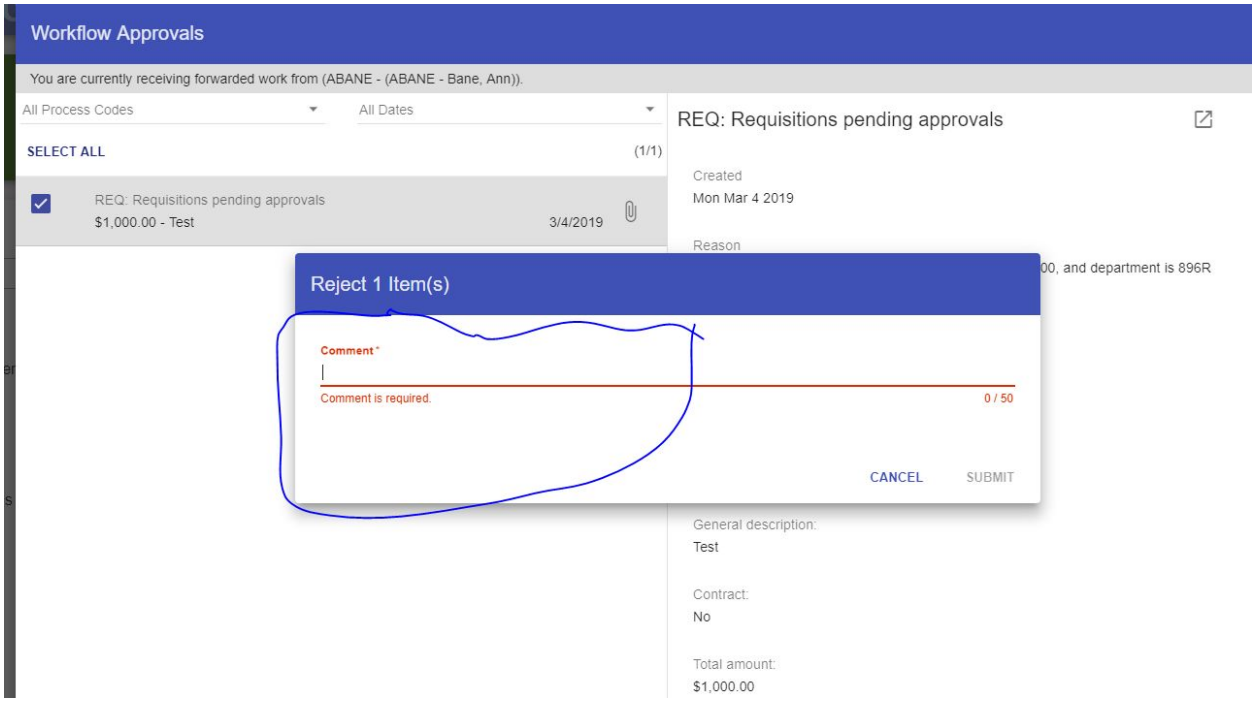
When done reviewing the item, CLOSE THE TAB THAT WAS OPENED FOR THE REVIEW.



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.



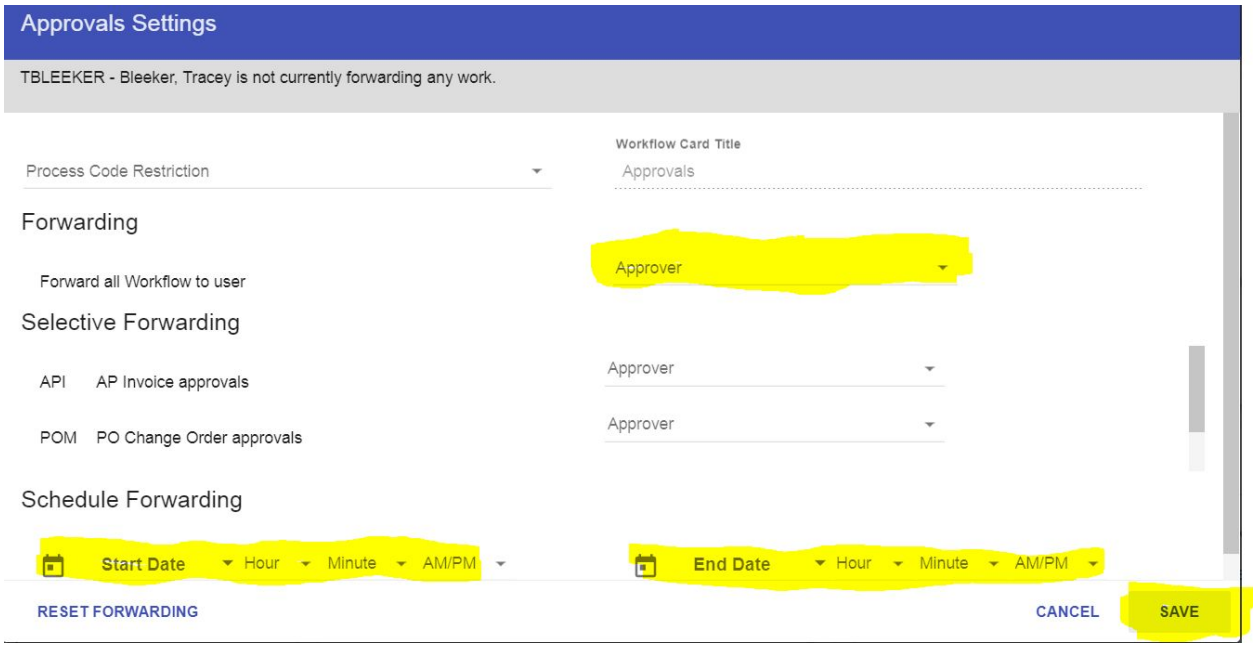
FORWARDING APPROVALS

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