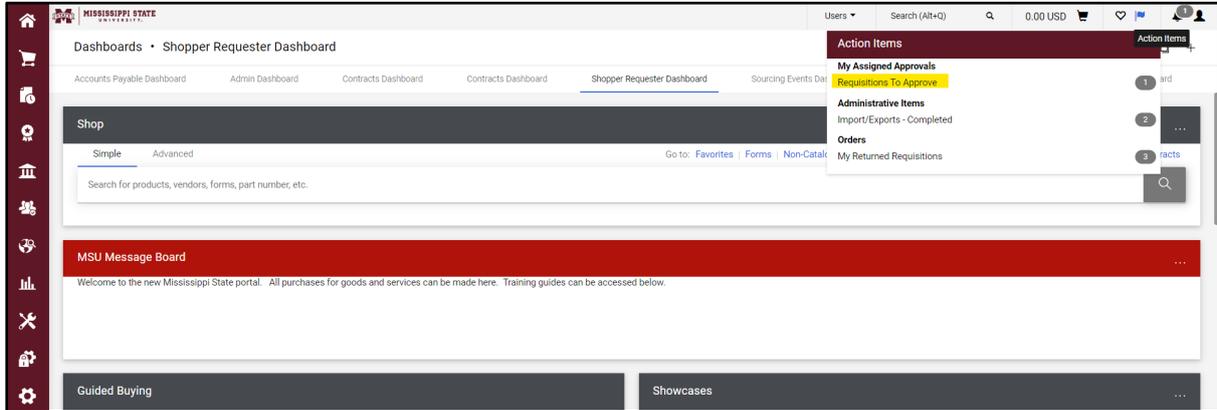




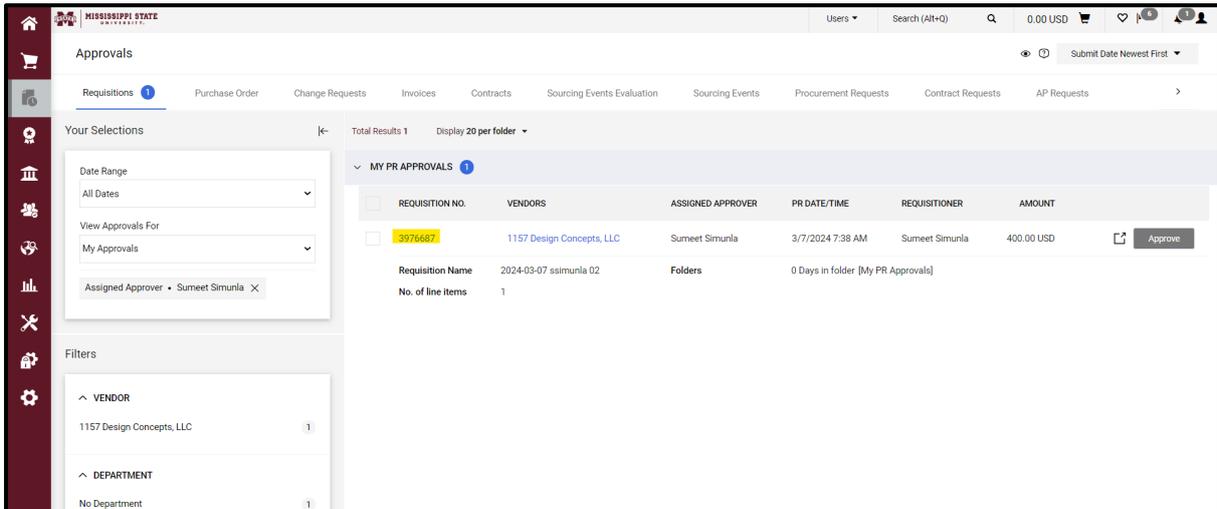
Approving & Returning a Requisition, Adding an Ad-Hoc Approver

The following document explains the step-by-step process for approving and/or returning the requisition back to the requestor.

- When a requisition is ready to approve, a notification will be sent via email. Requisitions pending approval can also be viewed from the *Action Item* Flag on the home page. Select *Requisitions to Approve*.

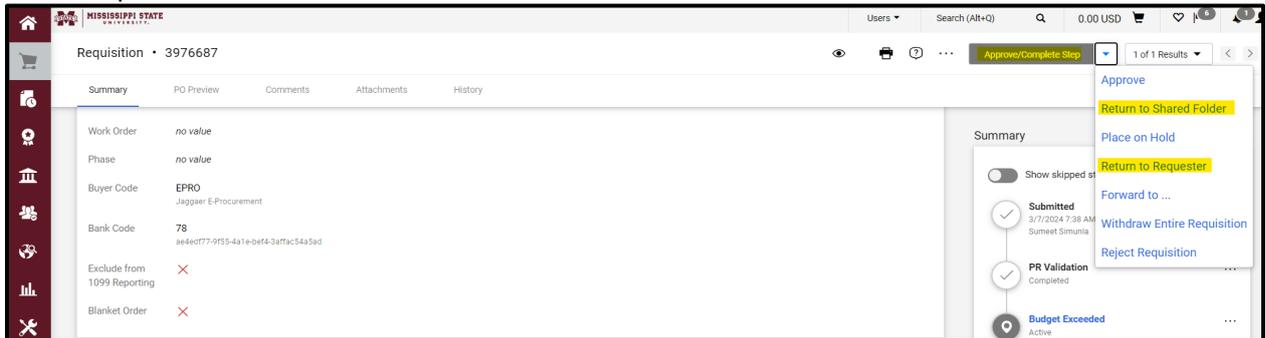


- All requisitions pending approval will be displayed. Select the *requisition number* to open the order.





- Once review is complete, select *Approve/Complete Step* or click the dropdown for more options.



Additional actions include:

Approve: Approves request and moves the requisition to the next workflow step.

Return to Shared Folder: Approvers within a group approval workflow step have the option to assign the request to themselves. This allows the approver to take ownership of the order and it will be removed from the shared folder. This option allows the approver to return it to the folder for someone else in the group to work on the order.

Place on Hold: This indicates that the requisition may require additional time to approve, a note can be added to highlight the delay.

Return to Requester: This option returns the requisition back to the requester for more information, a note can be added that will be delivered in the email to the requestor.

Forward to: This allows the approver to forward a requisition to another approver to take action on the requisition

Reject: This will reject/cancel the requisition

An ad-hoc approver can be added into workflow by any approver, this should be used to send a requisition to an approver who is not involved in the traditional requisition approval process. To add an ad-hoc approver, assign a requisition to yourself, select *Ad-Hoc approver* highlighted below. From here, adjust the name of the step to include a description of the approval step and add an approver.



General



Status	Pending Missing Workflow (Robert Wohlfarth)
Submitted	3/7/2024 2:23 PM
Cart Name	2024-03-07 CLA152 01
Description	<i>no value</i>
Priority	Normal
Prepared by	Caleb Alford
Prepared for	Caleb Alford
Ad-Hoc Approver	Select