



Quick Reference Guide

Navigating Approval Queues



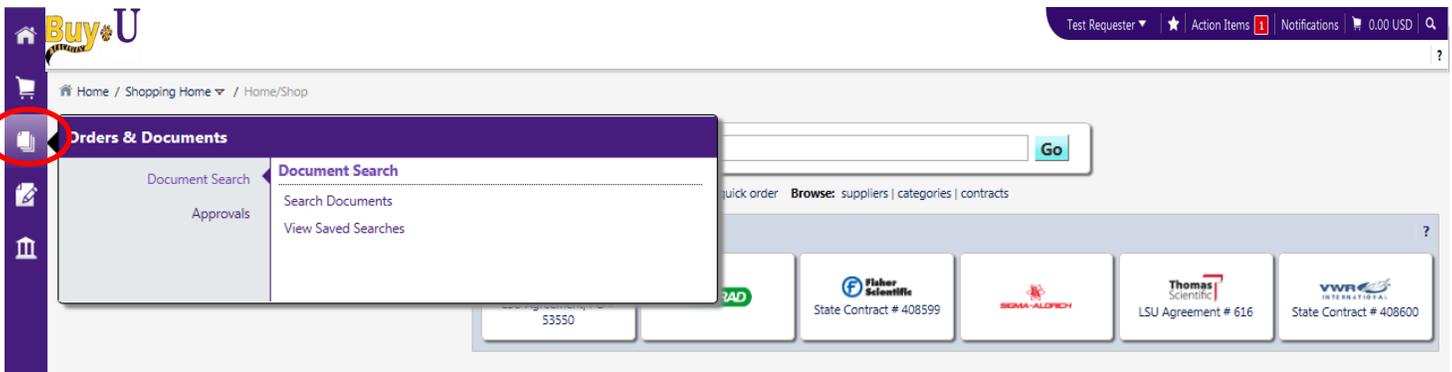
In This Guide

- ✓ Accessing approval queues
- ✓ Key features of approval queues

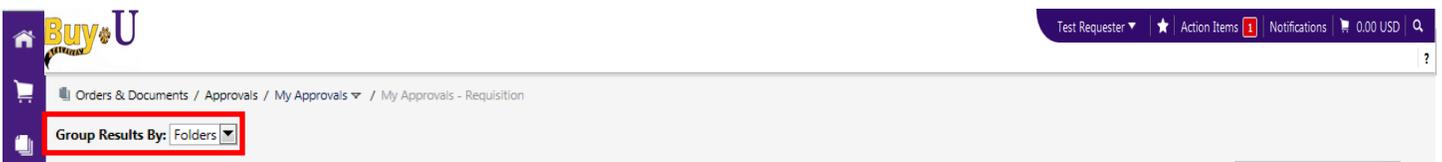
This guide demonstrates how to access approval queues and discusses some of the key features of the approval queues. Actual reviews and approvals are covered in a separate guide.

Procedure

1. Access your listing of approval queues by selecting the **Orders & Documents** icon from the navigation bar on the left side of the screen within **BUY-U**.



2. Select the **Approvals** link → **My Approvals**
3. The pending approval documents for which you have access are shown in the **My Approvals** tab. You can select **Group By Results** via the drop down list which contains a filter by **Folders** or **List**. The **Folders** option groups documents in folders by routing criteria. Alternately, you can select to view a general **List** of documents independent of folders.



4. If your preference of filtering is **Folders**, you'll see a list of one or more folders starting with the **My PR Approvals** folder.





5. The title of each folder (or approval queue) is the scope/account number or other dedicated name associated with that approval workflow step.

Buy@U

Orders & Documents / Approvals / My Approvals / My Approvals - Requisition

Group Results By: Folders

Total Results Found: 12 All Dates Assign Go

Sort by: Submit date newest first

Hide requisition details expand all collapse all Results per folder: 20

- My PR Approvals [2 results]
- Additional Required Approver 2: Sciqreqa, Lsu (sciqreqa1) (Sciqreqa, Lsu (sciqreqa1)): (All Values) [1 result]
- Additional Required Approver: Sciqreqa, Lsu (sciqreqa1) (Sciqreqa, Lsu (sciqreqa1)): (All Values) [1 result]
- Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values) [10 results]**

Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values) [10 results]

6. To open a folder, click the folder name or the "arrow" icon next to the folder name you wish to access. The subsequent list contains the requisition or invoice documents within the folder.

Buy@U

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- My PR Approvals [2 results]
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- Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values) [10 results]**

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
40826376	Dell(0004943)	Lsu Sciqreqa	6/23/2013 12:17 PM	Lsu Sciqreqa	6,226.35 USD	Assign
Requisition Name: 2013-06-23 sciqreq1 01 No. of line items: 2 Folders: 0 Days in folder [My PR Approvals] 0 Days in folder [Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values)]						
40772451	VWR INTERNATIONAL(0001968)	Lsu Sciqreqa	6/20/2013 3:07 PM	Lsu Sciqreqa	5,657.80 USD	Assign
Requisition Name: R-116 No. of line items: 3 Folders: 0 Days in folder [My PR Approvals] 2 Days in folder [Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values)]						
40771290	Grainger Industrial Supply(0003409)	Not Assigned	6/20/2013 1:13 PM	Lsu Sciqreqa	5,373.00 USD	Assign
Requisition Name: R-115 No. of line items: 1 Folders: 2 Days in folder [Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values)]						
40770916	Dell(0004943)	Not Assigned	6/20/2013 12:58 PM	Lsu Sciqreqa	6,577.30 USD	Assign
Requisition Name: R-113 No. of line items: 1 Folders: 2 Days in folder [Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values)]						
40769793	Dell(0004943)	Not Assigned	6/20/2013 12:49 PM	Lsu Sciqreqa	11,137.24 USD	Assign
Requisition Name: R-110 No. of line items: 2 Folders: 2 Days in folder [Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values)]						
40742539	Frost Barber Inc(0001922)	Not Assigned	6/19/2013 4:14 PM	Lsu Sciqreqa	6,160.00 USD	Assign
Requisition Name: R-101 No. of line items: 1 Folders: 3 Days in folder [Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values)]						
40742275	Dell(0004943)	Not Assigned	6/19/2013 4:08 PM	Lsu Sciqreqa	9,821.78 USD	Assign

7. Approval queues can be visually collapsed by clicking the folder name again on the "arrow" icon.

Buy@U

Orders & Documents / Approvals / My Approvals / My Approvals - Requisition

Group Results By: Folders

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Hide requisition details expand all collapse all Results per folder: 20

- My PR Approvals [2 results]
- Additional Required Approver 2: Sciqreqa, Lsu (sciqreqa1) (Sciqreqa, Lsu (sciqreqa1)): (All Values) [1 result]
- Additional Required Approver: Sciqreqa, Lsu (sciqreqa1) (Sciqreqa, Lsu (sciqreqa1)): (All Values) [1 result]
- Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values) [10 results]



8. The document line contains the following information: **Document Number, Supplier(s), Assigned Approver, Document Date/Time, Requisitioner, Amount, Document Name, and Number of Items**. There is also aging information on the duration the document has remained in this folder in this particular workflow step as indicated by the “# of days in Folder”.

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
40826376	Dell(0004943)	Lsu Sciqreqa	6/23/2013 12:17 PM	Lsu Sciqreq	6,226.35 USD	Assign

Requisition Name	2013-06-23 sciqreq1 01	Folders	0 Days in folder [My PR Approvals]
No. of line items	2		0 Days in folder [Approver: 184 - Sciqreqa, Lsu (sciqreqa1): (All Values)]

9. To arrange your documents by select criteria, i.e. Submit date oldest first, you can use the **Sort By** filter at the top of the approval queues.

The screenshot shows the 'Buy@U' interface with a list of approval queues. The 'Sort by' dropdown menu is open, displaying various sorting options. The 'Submit date newest first' option is currently selected.

10. If you want to limit the displayed approval queues, you can apply filters by navigating to **Refine Search Results** located on the left hand side and show results by **Type, Date Range, Folders, etc.**

The screenshot shows the 'Buy@U' interface with the 'Refine Search Results' panel expanded. The 'Type' dropdown is set to 'Requisition' and the 'Date Range' dropdown is set to 'All Dates'. A red arrow points from the 'Refine Search Results' panel to a magnified view of the dropdowns.

You have successfully navigated the approval queues.