Managing Approvals Quick Reference Guide

REQUISITION APPROVAL OVERVIEW

In BuyU, purchase requisitions (PR's) are moved to workflow queues or folders, and approvers are assigned to those folders. Multiple approvers may be assigned to the same folder.

EMAILS

If you are an approver, by default you will receive an email notification to your LSUHSC 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 click a link in the email to view the requisition in BuyU.

APPROVAL FOLDERS

A summary of all requisitions awaiting your approval can be found by clicking **Action Items** at the top of the page. You will see a screen similar to the one below:

To review the requisitions awaiting approval, click the **Unassigned Requisitions Needing Approval** [1] link shown above. You will see a page similar to the one shown below:

On the left, you can utilize filters to narrow the results by document type, date, approval folder, department, etc. On the right, you will see several folders containing one or more requisitions. You will have a folder for each of your approval permissions and one folder called **My PR Approvals**, which will only display when you have assigned a requisition to yourself for review.

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 ☑ next to the PR(s) to review, make sure **Assign ▼** is selected in the drop-down at the top right of the screen, and click **Go**.
2. The requisition(s) will now appear in your **My PR Approvals** folder.
3. To approve without reviewing the requisition, click the **Approve** button.
4. Otherwise, click the **requisition number** to open the purchase requisition (PR).
5. After reviewing the PR, select **Approve/Complete & Show Next ▼** from the drop-down at the top right of the screen, and click **Go**.
6. The PR has been approved, and the next requisition to review will display.

REJECTING REQUISITIONS

You may reject an entire PR or individual line items of a multi-line PR:

1. Assign the requisition(s) to yourself for review as described above.
2. In **My PR Approvals** folder, click the **requisition number** to open the PR.
3. To reject the entire requisition, select **Reject Requisition ▼** from the drop-down at the top right of the page, and click **Go**.
4. Enter a reason for rejecting the requisition, which will be saved on the PR for the requisitioner to see, and then click **Reject Requisition**.
5. To reject specific line(s) on a PR, click the ☑ next to the line(s) to reject.
6. Select **Reject Selected Items ▼** above the first line item, and click **Go**.
7. Enter a reason for rejecting the line item(s), and click **Reject Line Item**.
8. Select **Approve/Complete & Show Next ▼** at the top right of the page, and click **Go** to complete the rejection and approve the remaining line items.

RETURNING REQUISITIONS

If a requisition requires changes before approval, you can return it so changes can be made. To return a requisition:

1. Assign the requisition(s) to yourself for review as described above.
2. The requisition(s) will now appear in your **My PR Approvals** folder.
3. In **My PR Approvals** folder, click the **requisition number** to open the PR.
4. Select the **Return to Requisitioner ▼** option from the drop-down menu at the top right of the page, and click **Go**.
5. Enter a reason for returning the requisition, which will be saved on the PR for the requisitioner to see. Click **Return to Requisitioner**.