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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.

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.

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

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.

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.

You have successfully navigated the approval queues.