How to Approve a Requisition

1. If your main role in ShopBlue is to approve requisitions, you may want to set your homepage to the Approver Dashboard instead of the shopping homepage. To do this, select the dropdown next to your name in the upper right hand corner of the screen and select Dashboards. This will bring you to your Approver Dashboard. If a different dashboard appears, select View Another Dashboard towards the top of the screen, and go to Approver Dashboard from the dropdown menu. Once the Approver Dashboard is displayed, you can set it as your homepage by selecting your name at the top of the screen, and select Set My Home Page from the dropdown menu. Then, select Current Page from the pop up box, and Save Changes. Your homepage is now set as the Approver Dashboard.
2. From the Approver Dashboard, you can begin to access your approvals. In order to approve a purchase request, you must first assign it to yourself. To do this, in the Action Items module, under Unassigned Approvals, select Requisitions. From the ensuing page, click on an account to expand the folder. On the right side of the screen within the requisition, select the checkbox next to the requisitions you would like to assign to yourself, and select Assign.

3. The requisitions you have selected are now assigned to you, and you can access the requisitions several different ways. In this example, select the My Approvals dropdown at the top of the page from the breadcrumbs and select My Approvals. This will then populate a My Assigned PR Approvals folder that will contain all of the requisitions assigned to you. Next, expand the folder and select the seven digit Requisition number to open and review the Requisition.
4. Once you have accessed the requisition, you will be able to look through it and change or add any information necessary before approving it (account numbers, funding source, etc.). There are multiple avenues to do this. First, you can view the summary, which is what will initially display when selecting the requisition, scroll and select the edit button on the right to modify any information. Or, you can go directly to the specific section you would like to edit. For example, Accounting Codes, there is a gray section to the left where you can select that section, and edit as necessary. *Please note: If you do not see edit buttons on the right side of the requisition, you may not have correctly assigned it to yourself. Please then select the Document Action dropdown next to the History button and select Assign to myself. You should then see the edit buttons.

5. Once you have edited the requisition as needed, you are ready to approve it. To approve, click the Document Actions dropdown at the upper right of the requisition, and select Approve/Complete Step (note also the other choices in the Document Actions dropdown).