

Approver Role and Function

What is an approver?

The term approver is used to describe someone that is responsible for reviewing and evaluating purchase orders and/or requisitions. Approvers can take one of the following actions: Approve, Return or Reject Requisitions or Put Requisitions on Hold.

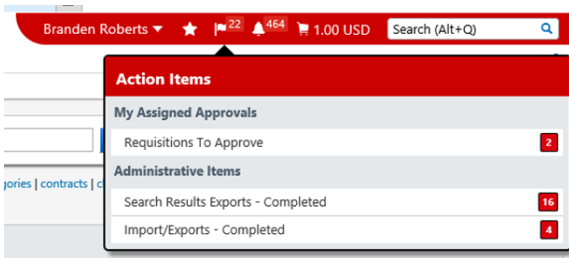
APPROVERS WILL NOT HAVE ABILITY TO APPROVE THEIR OWN REQUEST

How to view My Approvals

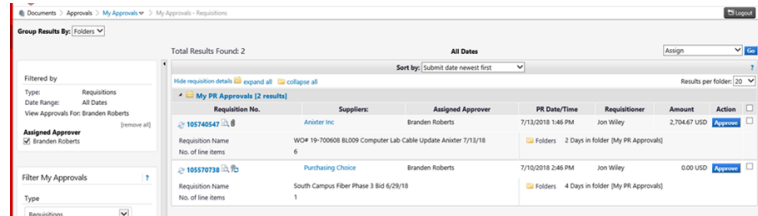
Two Ways to View approvals

1. Folder View
 - a) The "Folder View" groups the documents by Approval folder.
 - b) Prefer if approving for multiple folders
2. List View - The "List View" displays all documents in a list format. By default, the list will be sorted by date/time, but there are several sorting options including document number and document title.

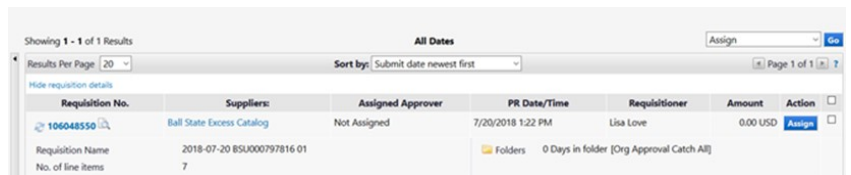
"My Approvals"



Folder View



List View



How to view My Approvals

Step-by-Step to Approve a Requisition

STANDARD APPROVALS: With standard approvals, the approver opens the order and reviews the information and makes any changes if needed, then approves the order. To make changes, return or **reject**, user must assign to themselves and take action.

1. In the My Approvals folder locate and open the document(s) you would like to **approve**.
2. Open the document and review the information and make updates if needed.
3. Select the **Approve/Complete** option from the Actions menu. To **approve** the document and move it to the next in your Approvals select Approve/Complete & Show Next from the drop-down.

Approving-Items to Verify

1. Look who prepared or who is requesting item.
2. Accounting Codes (FOAPAL)
Fund and Program match fund is NOT 100100
Correct organization code
Account Code correct
3. Non Po Payment
Request for Payment
Verify if invoice attached does not have tax applied
4. Non-Catalog
If attached quote make sure items matches quote
Multiple Quote comparisons should only be included in "internal attachments"

Resources for approvers

How to confirm what program code should be used with what fund:
Argos Report can be found
Production-INB>Controller>Public>Program Code Lookup>Dashboard