



OBJECTIVES

Before an order can be completed, it will go through an approval process. In this process, requisitions are assigned to one or more approvers via steps in a workflow process. Approvers review the document and approve or reject line items or the order as a whole. In this document, we will familiarize Approvers with how to access, review and approve requests and purchase orders.

REQUISITION APPROVALS

Upon submission of a requisition, an email is sent to users who have been assigned the role of **Approver** for specific GL account codes. This notification alerts the approver that action is required before the order proceed towards completion. A single approver may be assigned based on a specific GL or could be assigned to a folder in which multiple approvers have the ability to approve the request.

To access the requisition there are 4 ways to do so:

- 1) Use the link in the notification email

*The following requisition(s) are in your folder pending for approval:-
Requisition # 2933767 entry submitted since 4/1/2020*

Please "Approve or Reject" as soon as possible.

You can approve or reject requisition(s) on line by clicking the URL below

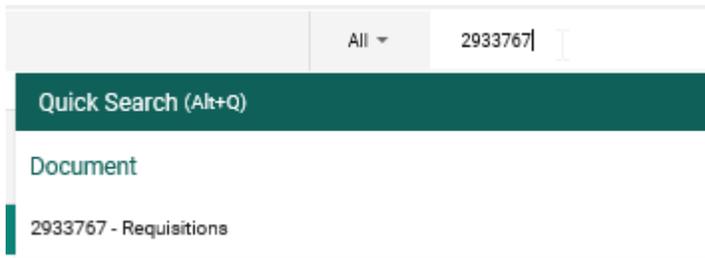
<https://usertest.sciquest.com/apps/Router/ReqMyApprovals?FromLink=true&tmstmp=1586253619738&AuthUser=2840460>

Thank you,

Coastal Carolina University

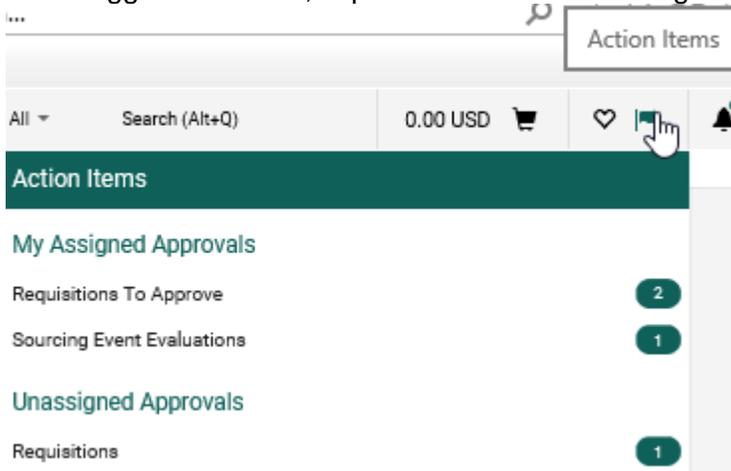
OR

- 2) Navigate to the “ePro@ccu” website using your CCU username and password. Users will be taken to the “ePro@ccu” landing page.
Key the REQ # into the SEARCH field



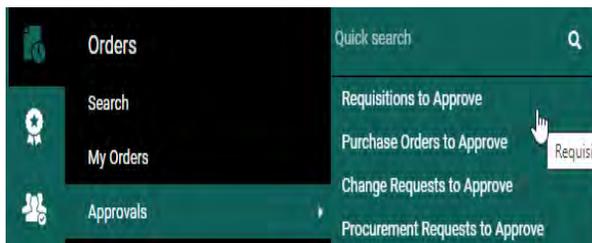
Click on the chosen REQ #
OR

- Once logged in to ePro, expand the Action Items flag



The User's roles will determine the amount of folders listed
 Select the appropriate folder
 Locate the requisition to approve
OR

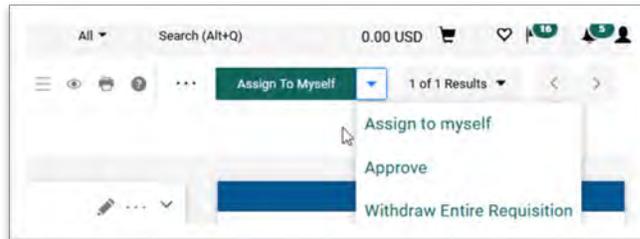
- The Approver can search via Document Search for the Requisition Number
 Click on the **Orders** icon in the left menu then **Approvals** then select the area to approve.



To review the requisition, click in the **Requisition Number**.
 The requisition will open.

Select the action task of **Assign to myself**

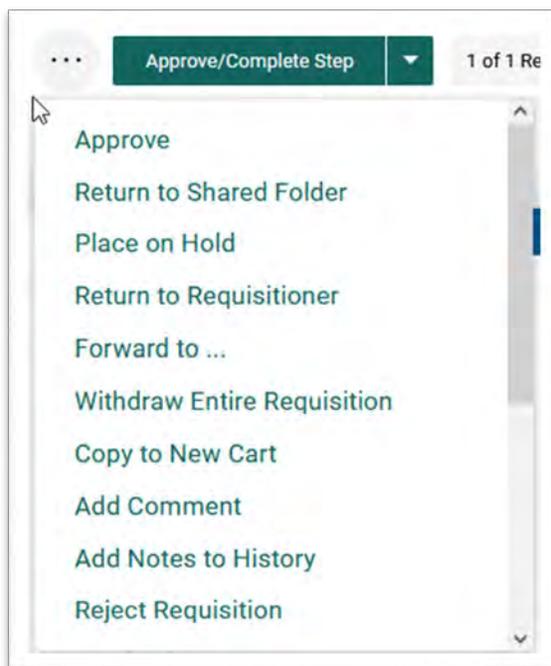
This provides more options for editing and workflow options.



Review the request for accuracy of information

Edit as necessary

To complete the Approver step, select the action task via drop down or 3 dots.
The following options appear



Approve/Complete Step: the approver is satisfied with the requisition. This moves the REQ to the next step in the workflow.

Note – if multiple approvers are listed, this should be done by the main Approver. Verify your role and process with your area / department Business Manager prior to completing this step.

Return to Shared Folder: if you need to unassign a requisition from yourself. If multiple approvers are listed in your step, this allows them access to edit the requisition or approve.

Place on Hold: If multiple approvers are within the same workflow step, this allows a user to temporarily HOLD the requisition so that it is not accidentally approved and moved forward in the process.

Return to Requisitionor: the requisition is not ready to proceed, possibly changes have occurred since initiated or more information is required to be attached. The requisitionor receives notification and is then able to edit the cart and resubmit. Depending at what level of the workflow process this occurs, Budget Officers or special departments may need to re-approve.

Forward to: this allows an Approver to give all of their rights and permissions to someone else for this step only. Use with extreme caution.

Add Comment: Highly recommend using this feature for all steps within a requisition. Users can add a comment or ask a question, include an attachment and email it to another user (if they so desire). Comments will also appear in the HISTORY section.

Note – for steps containing multiple Approvers, this allows them to acknowledge their approval while still permitting the Main Approver to take the Approve / Complete action step.

Add Notes to History: similar to Add Comment but without the attachment and email user functionality.

Reject Requisition: this option cancels the requisition entirely. A comment is required. Ability to Copy to a New Cart is needed to re-create at a later date.

Once completed, the requisition will move to the next appropriate step.

Please review additional handouts:

- Ad-Hoc Approvers
- Substitute Approvers
- Change Requests

and all the handouts on the Procurement page related to ePro@ccu