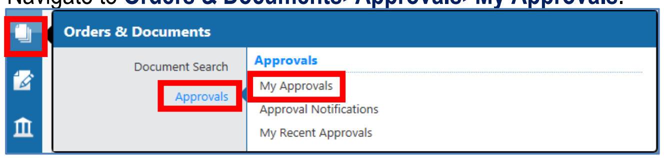
Requisition Approver

Concepts

- Requisition Approval is a required activity for all requisitions over the $1000 self-approval threshold.
- Regardless of the total requisition value, Requisition Approval is required for Services, After the Fact, Subawards and Payment Requests.
- Requisition Approvers can only view, approve, and return/reject requisitions. Requisition Approvers **cannot edit** any requisition fields.

Accessing Requisitions Pending Review and Approval

1. Navigate to **Orders & Documents>Approvals>My Approvals**.



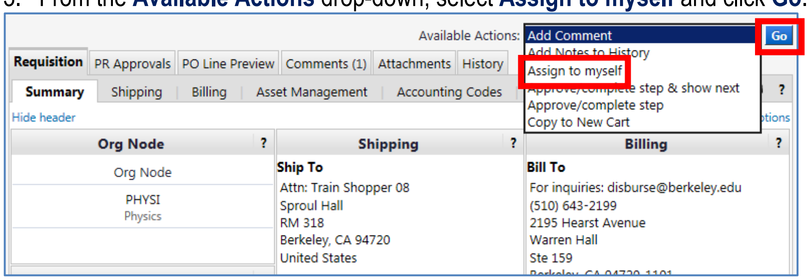
Filter Requisition Approvals

Filter options are available in the left Filter bar and can filter by **Date Range, Supplier, Current Workflow Step, Prepared For, Prepared By, Status Flags, Custom Fields, Product Flags, Form Type, Folders, Priority, Assigned Approver,** and **Current Workflow Step**.

If you're managing a worklist that is shared amongst a group of Requisition Approvers, it is recommended to select the **Not Assigned State** filter.

Assigning Requisition to Myself

1. Navigate to **Orders & Documents>Approvals>My Approvals**.
2. Select the **requisition number.**
3. From the **Available Actions** drop-down, select **Assign to myself** and click **Go**.



Adding a Comment

1. In the **requisition**, navigate to the **Comments** tab.
2. Select **Add Comment**.
3. Enter comment. Select individuals to receive the comment via email.
   a. If the individual you wish to select is not listed select **add email recipient.**.
4. Once you've added a comment and selected email recipient(s) click **Add Comment**.

Adding an Attachment

1. In the **requisition**, navigate to the **Comments** tab.
2. Select **Add Comment**.
3. Select **Browse** within the **File** section.
4. Browse and select the file. Click **Open**.
5. Enter comment if desired, otherwise, select **Add Comment**.

Return a Requisition to the Shared Folders

1. In the **requisition**, navigate to the **Available Actions** drop-down menu.
2. From **Available Actions**, select **Return to Shared Folder**.
3. Select **Go**.

Approve a Requisition

1. Review the requisition to ensure transaction is ok to approve.
2. Navigate to **Available Actions**.
3. From **Available Actions**, select **Approve/Complete Step** and click **Go**.

To Return

1. In the **requisition**, navigate to the **Available Actions** drop-down menu.
2. From **Available Actions**, select **Return to Submitter.**
3. Click **Go**.
4. You will be prompted to enter a **Reason for return.**
5. Click **Return to Submitter**.

Assign Substitute Approvers

To have a substitute approver assigned, contact the BearBuy Help Desk, bearbuyhelp@berkeley.edu.