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Approvals Quick Reference Guide

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APPROVAL OVERVIEW

In BishopBuy, purchase requisitions are moved to workflow queues or folders, and approvers are assigned to those folders. Multiple approvers may be assigned to the same folder.

EMAILS

If you are an approver, you will by default receive an email notification to your Ohio Wesleyan email account notifying you when a new requisition is pending your approval. You can approve or cancel the requisition directly from your email, or you can click a link in the email to view the requisition in BishopBuy.

APPROVAL FOLDERS

A summary of all requisitions awaiting your approval can be found by clicking Action Items

at the top of the page. You will see a screen similar to the one below:

Action Items
My Assigned Approvals
Requisitions To Approve 1
Unassigned Approvals
Unassigned Requisitions Needing Approval 19

To review the requisitions awaiting approval, click the

Unassigned Requisitions Needing Approval link shown above. You will see a page similar to the one shown below:

	Total Results	Found: 1		All Dates		Assign	▼ Go	
Filtered by	•		Sort by: Subm	it date newest first			?	
Type: Requisitions	Hide requisition (Hide requisition details 🖴 expand all 📴 collapse all					Results per folder: 20 🔻	
Date Range: All Dates	🔺 🖴 Organ	< 🖴 Organization: 1127 (Music Dept): (All Values) [1 result]						
View Approvals For: Alex Approver	Requisitio	on No. Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action 🗆	
State Not Assigned	@ 1276329	C Ice Mountain Spring Water	Not Assigned	1/16/2015 12:25 PM	Melanie Kalb	1,000.00	USD Assign	
Filter My Approvals		Requisition Name 2015-01-16 mtkalb 03 🔤 Folders 18 Days in folder [Organization: 1127 (Music Dept): (Al						
Date Range								
All Dates *								
Supplier								
ice Mountain Spring Water (1)								
Department								
Accounting (Accounting) (1)								
Current Workflow Step								
Low Dollar Amount Approval (1)								
Prepared For								
Melanie Kalb (1)								
Prepared By								
Melanie Kalb (1)								
Form Type								
Blanket Order (1)								
Folders								

On the left, you can utilize filters to narrow the results by document type, date, approval folder, department, etc. On the right, you will see several folders containing one or more requisitions. You will have a folder for each of your approval permissions and one folder called **My PR Approvals**, which will only display when you have assigned a requisition to yourself for review.

APPROVING REQUISITIONS

Because multiple users may be assigned to the same approval folder and to avoid duplication of effor<u>t</u>, follow these steps for reviewing and approving requisitions:

- 1. Click the **Assign** button next to the requisition you wish to review.
- 2. That requisition will now appear in your My PR Approvals folder.
- 3. To approve without reviewing the requisition, click the Approve button.
- 4. Otherwise, click the requisition number to open the purchase requisition (PR).
- 5. After reviewing the PR, select Approve/Complete & Show Next T from the

drop-down at the top right of the screen, and click **Go**. 6. The PR has been approved, and the next requisition to review will display.

CANCELLING REQUISITIONS

You may cancel an entire PR or individual line items of a multi-line PR:

- 1. Click the Assign button next to the requisition you wish to review.
- 2. The requisition will now appear in your My PR Approvals folder.
- 3. In My PR Approvals folder, click the requisition number to open the PR.
- 4. To cancel the entire requisition, select Cancel Requisition **•** from the drop-down at the top right of the page, and click **Go**.
- 5. Enter a reason for cancelling the requisition, which will be saved on the PR for the requisitioner to see, and then click **Cancel Requisition**
- 6. To cancel specific line(s) on a PR, scroll down and click the wine next to the line(s) to cancel.
- 7. Select Cancel Selected Items above the first line item, and click Go
- 8. Enter a reason for cancelling the line item(s), and click Cancel Line Item
- 9. Select Approve/Complete & Show Next at the top right of the page, and

click **Go** to complete the cancellation and approve the remaining line items.

RETURNING REQUISITIONS

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If you determine a requisition requires changes before approval, you can return it to the requisitioner so they can make changes and then resubmit. To return the requisition:

- 1. Click the Assign button next to the requisition you wish to review.
- 2. That requisition will now appear in your My PR Approvals folder.
- 3. In My PR Approvals folder, click the requisition number to open the PR.
 - Select the Return to Requisitioner optio
 - option from the drop-down menu at
 - the top right of the page, and click Go.
- 5. Enter a reason for returning the requisition, which will be saved on the PR for the requisitioner to see. Click Return to Requisitioner