This how-to sheet outlines the steps required for approvers:

- To review and action (e.g. approve) pending requisitions
- To assign pending requisitions to yourself (see step 3) so you can also edit, reject or return requisitions

What changes can an approver make to a requisition?

- The index (i.e. funding source) (see step 5)
- Quantity of goods. While approvers can edit the quantity, Procurement Services recommends that you return the requisition to the requisitioner (i.e. to the person who created it) to edit the quantity.

**THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP**

1. We recommend that approvers action their pending approvals on a regular basis.

   On the ‘Approvals’ page, pending approvals are organized into collapsed buckets based the index (i.e. the funding source) and the amount of the requisition.

2. Click on an arrow to expand a collapsed bucket.

   **Tip:** If you expand buckets, they will stay that way until you collapse them.

   Specific requisitions in a given bucket will be listed.

   **Tip:** If another approver has assigned a requisition to themselves, it will not appear in any of the buckets.
3a. **Assigning a Requisition to Yourself ....**

If there are multiple approvers for a given requisition, all approvers will receive a notification email.

To ensure that you are the approver for a particular requisition, you must assign it to yourself.

Assigning the requisition to yourself also allows you to make changes to the requisition (see step 5), return a requisition (see step 9) and reject a requisition (see step 8).

To assign a requisition to yourself, click on the box at the end of a given row.

3b. **Assigning a Requisition to Yourself ....**

Click on the arrow beside ‘Add Notes to History’ to find other options.
3c. **Assigning a Requisition to Yourself ....**

In the window that opens, click on ‘Assign’.

3d. **Assigning a Requisition to Yourself ....**

The requisition will now appear in a new bucket called ‘MY PR APPROVALS’.

Click on the arrow to view the requisition.

**Tip:** Once you have assigned a requisition to yourself, it will disappear from other approvers’ lists.

4. **Reviewing a Requisition ...**

Once you’ve expanded a folder, click on a blue requisition number to view the details (e.g. quantity, total cost, and index).
5a. **Reviewing & Editing the Index ...**

The index (i.e. funding source) is identified for each line item under ‘EXPENSE FUNDING’.

To edit the index, click on the pencil icon.

5b. **Reviewing & Editing the Index ...**

From the ‘Override’ window, you can change the ‘FOAPAL Index*’ by typing in a new index or clicking on the magnifying glass icon to view a list of the indexes that you have access to.

The ‘Account*’ and ‘Activity’ fields can also be edited.

If you make any changes, remember to click on the red ‘Save’ button.
6. Editing the Quantity …

While approvers can edit quantities (i.e. for goods), Procurement Services recommends that you send the requisition back to the requisitioner (i.e. the person who created it) to edit the quantities.

Contact eshop@carleton.ca with any questions.

7. Approving a Requisition …

If you HAVE NOT assigned the requisition to yourself, click on the arrow beside the red ‘Assign to Myself’ button.

To approve the requisition, click on the blue ‘Approve’ text.

Click on ‘Approve & Next’ to approve the requisition and open the next requisition in your list.

8a. Rejecting a Requisition …

If you HAVE NOT assigned the requisition to yourself, click on the red ‘Assign to Myself’ button.

The button will change to either ‘Approve’ or ‘Approve and Next’. Click on the blue arrow beside this button to view options.

In the window that opens, click on the ‘Reject Requisition’ button.
8b. **Rejecting a requisition ...**

You will be prompted to enter the reason you’ve rejected the requisition in the ‘PR Rejected Reason’ field. The requisitioner (i.e. the person who submitted the requisition) will see this.

Click on the red ‘Reject Requisition’ button.

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9a. **Returning a Requisition**

If you HAVE NOT assigned the requisition to yourself, click on the red ‘Assign to Myself’ button.

The button will change to either ‘Approve’ or ‘Approve and Next’. Click on the blue arrow beside this button to view the options.

In the window that opens, click on the ‘Reject Requisition’ button.

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9b. **You will be prompted to enter the reason you are returning the requisition in the ‘Return to Requisitioner’ field. Use this field to tell the requisitioner why the requisition was not approved (e.g. what needs to be fixed).**

Click on the red ‘Save Changes’ button.
What next?

- Visit carleton.ca/facts/eshop to find more how-to sheets.
- Questions about the system? Email eshop@carleton.ca or call 613-520-2600 ext.3311.