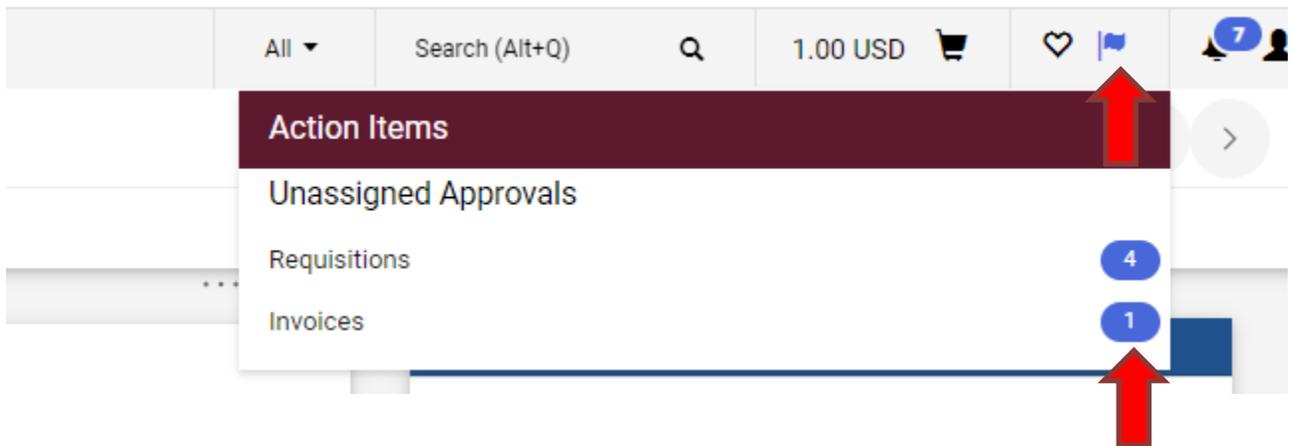


How do I locate documents that I need to approve?

You can identify the documents awaiting your review and approval by going to the **Action Items**.

1. Click on the **Action Items** Icon – if items need approval, a number in blue will show next to the action items icon.
 - a. Unassigned Approval
 - i. These are invoices and requisitions that need to be reviewed and approved.



Approving Documents

To review the document for approval, select the document number. Note: The approver can view results as a list or by folder. If the folder is selected, it will show each folder, and the user can then select the document number from each folder. The list view will show them all in the sort by order. Changing the “Sort by” to “Submit date oldest first” is recommended.

Total Results 4 Display 20 per folder ▼

▼ 16-TAMIU PURCHASING APPROVAL 4

| <input type="checkbox"/> | REQUISITION NO. | SUPPLIERS | ASSIGNED APPROVER | PR DATE/TIME | REQUISITIONER |
|--------------------------|-------------------|--|-------------------|---|----------------|
| <input type="checkbox"/> | 170813928 | MEDIA DUPLICATION SYSTEMS MULTIMEDIA EFFECTS INC DBA | Not Assigned | 4/27/2023 5:07 PM | Yezmin Salazar |
| | Car Line | Ehernet Cloning Machine | Folders | 0 Days in folder [16-TAMIU Purchasing Approval] | |
| | No. of line items | 1 | | | |

The document summary will appear as shown below.

| General | Shipping | Billing | Pending | | | | | | |
|---|--|---|--|--------------------|----------|----------|----------|--|---------------------------------|
| Status Pending <small>16-Purchasing Approval-Dept</small> | Ship To Attn: Information Technology c/o Central Receiving Room 5201 University Blvd Laredo, TX 78041 United States | Bill To Texas A&M International University – Accounts Payable ***Do Not Mail Invoice*** Email invoices to invoices@tamui.edu 5201 University Blvd. Laredo, TX 78041-1920 United States | Total (15,900.00 USD) Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals. | | | | | | |
| Submitted 4/27/2023 5:07 PM Business Unit 16-Texas A&M International University (16) Ordering Department 16-CISC (16-CISC) Cart Name Ethernet Cloning Machine Share cart OIT <small>View Members</small> | Delivery Options Ship Via Best Carrier-Best Way Requested Delivery Date no value Pre-Pay & Add ✗ | Accounting Info Do Not Encumber ✗ Rush the Pymt Process ✗ Special Payment Method no value Cost Receipt Required ✗ IFR (Item for Resale) ✗ Trade-In ✗ Create Asset Manually ✗ | Subtotal Shipping Handling | | | | | | |
| Prepared by Yezmin Salazar Prepared for Yezmin Salazar Cart Description/Purpose no value Software and/or Cloud Services (attach IT Review Form) ✗ Order Category 1 - Regular Report Reference A no value | Procurement Services <table border="1"> <thead> <tr> <th>Buyer</th> <th>Buyer Email</th> <th>Buyer Phone Number</th> </tr> </thead> <tbody> <tr> <td>no value</td> <td>no value</td> <td>no value</td> </tr> </tbody> </table> Emergency (attach justification) ✗ | Buyer | Buyer Email | Buyer Phone Number | no value | no value | no value | | What's next? Workflow |
| Buyer | Buyer Email | Buyer Phone Number | | | | | | | |
| no value | no value | no value | | | | | | | |
| | | | Submitted 4/27/2023 5:07 PM Yezmin Salazar | | | | | | |
| | | | Central Doc Check Approved ✓ Carlos Bella | | | | | | |
| | | | 16-Commodity Code Assigner Approved ✓ Carlos Bella | | | | | | |

1. Assign the requisition to yourself (optional)
2. Verify that the purchase/payment request is within disbursement guidelines and allocated to the appropriate account(s).
3. Then select Approve & Show Next from the Available Actions drop-down. If an approver needs to return (preferred method) or reject a requisition, the approver must “Assign” the requisition to see those available actions.

Requisition • 170813928

Summary Taxes/S&H PO Preview Comments Attachments 2 History

| General | Shipping | Billing | Pending |
|--|---|---|--|
| Status Pending <small>16-Purchasing Approval-Dept</small> | Ship To Attn: Information Technology c/o Central Receiving Room 5201 University Blvd Laredo, TX 78041 United States | Bill To Texas A&M International University – Accounts Payable ***Do Not Mail Invoice*** Email invoices to invoices@tamui.edu 5201 University Blvd. Laredo, TX 78041-1920 United States | Total (15,900.00 USD) Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals. |
| Submitted 4/27/2023 5:07 PM Business Unit 16-Texas A&M International University (16) Ordering Department 16-CISC (16-CISC) Cart Name Ethernet Cloning Machine Share cart OIT <small>View Members</small> | Delivery Options Ship Via Best Carrier-Best Way Requested Delivery Date no value | Accounting Info Do Not Encumber ✗ Rush the Pymt Process ✗ | Subtotal Shipping Handling |
| Prepared by Yezmin Salazar Prepared for Yezmin Salazar | | | What's next? Workflow |

Assign To Myself 1 of 4 Results

Requisition Available Actions

1. Approve/Complete & Show Next
 - a. This will approve the current requisition and automatically open the next requisition for review.
2. Approve
 - a. This will approve the requisition, but you will stay on the current document.
3. Return to Shared Folder
 - a. You have assigned a document but will not be processing it. Returning it to the shared folder allows another approver to assign and process the document.
4. Return to Requisitioner
 - a. Returns the document to the creator for revisions (please remember to add notes to identify why it is being returned to the requisitioner)
5. Reject Requisition
 - a. Rejecting the document is canceling it. The creator is not able to resubmit.

Requisition • 170813928

Approve/Complete & Show Next 1 of 4 Results

Summary Taxes/S&H PO Preview Comments Attachments 2 History

| General | Shipping | Billing |
|--|---|--|
| Status Pending 16-Purchasing Approval-Dept (Carlos Bella) | Ship To | Bill To |
| Submitted 4/27/2023 5:07 PM | Attn: Information Technology c/o Central Receiving | Texas A&M International University - Accounts Payable ***Do Not Mail Invoice*** Email invoices to invoices@tamiu.edu |
| Business Unit 16-Texas A&M International University (16) | Room 5201 University Blvd Laredo, TX 78041 United States | 5201 University Blvd. Laredo, TX 78041-1920 United States |
| Ordering Department 16-CISC (16-CISC) | | Accounting Info |
| Cart Name Ethernet Cloning Machine | Delivery Options | |
| Share cart OIT | | |

Correct these issues.
You are unable to proceed u
Required: Buyer
Required: Buyer Email
Required: Buyer Phone Nu

Total (15,900.00 USD)
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget tracking and workflow annuals

Approve & Next
Approve
Return to Shared Folder
Return to Requisitioner
Forward to ...
Reject Requisition



Creating an Email Approval Code

If you would like to approve documents from the email notifications you receive, then you must set an email approval code.

