

Shasta County Office of Education

Approve Requisitions

1. Select Finance-Requisitions-Approve Requisitions from the Activities tree.
2. From the Search tab toolbar, you may press the Go button to obtain all requisitions awaiting your approval or you may limit your approval list to specific requisitions by including search criteria and then pressing the Go button.
3. After pressing Go on the Search tab toolbar, the List tab will include requisitions awaiting your approval. The list includes various columns.
4. Approvers have two options for reviewing requisitions awaiting their approval.
 - a. Click on the Preview item button located on the List tab toolbar. Select “All Requisitions” to view all or select “Selected Requisition Only” to see the snapshot for the highlighted requisition only.
 - b. Approvers may also use the requisition link located on the List tab to the left of the Req Number to view the requisition form in greater detail and to view any supporting documents located on the Attachments tab of the requisition.
5. If you would like to make a comment use the **Approval Comment** field (max 50 characters).
6. If you would like to place a note on the Notes tab of the requisition use the **Req Note** field.

IMPORTANT - The **Action** column default is **Approve**. To take any action on the requisition other than an approval, you must change the Action to either Defer or Deny.

7. From the List tab verify/update the action for each requisition. To Defer or Deny a requisition use the drop down menu located at the end of each **Action** field to change the action. **When taking any action other than Approve, a note indicating the reason for the requisition being deferred or denied should be made in the Approval Comment Field.** Deferred requisitions will continue to await your approval. Denied requisitions will release encumbered funds back to the account balance and an automated email will be sent to the document originator notifying them that it has been denied. The information entered in the Approval Comment field is included in the email they receive. The Req Note field adds a note to the Notes tab of the requisition
8. Once each requisition has been reviewed, and the Action field for each requisition has been set appropriately, click on the *Tasks* button and select *Post Approvals/Denials*.
9. The software will prompt you to provide final confirmation. Verify the number of requisitions you are Approving, Denying and Deferring.
10. Press Yes to post.