

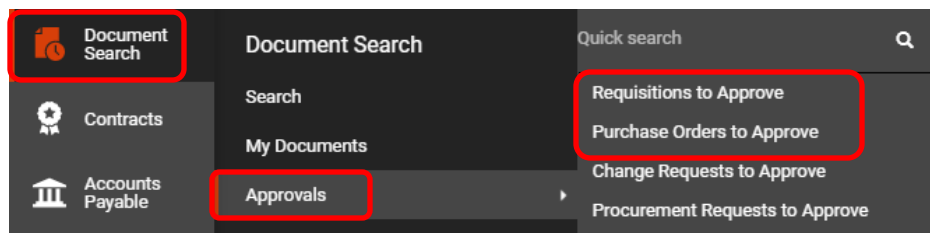
Approval Queue Management

What is My Approval Queue?

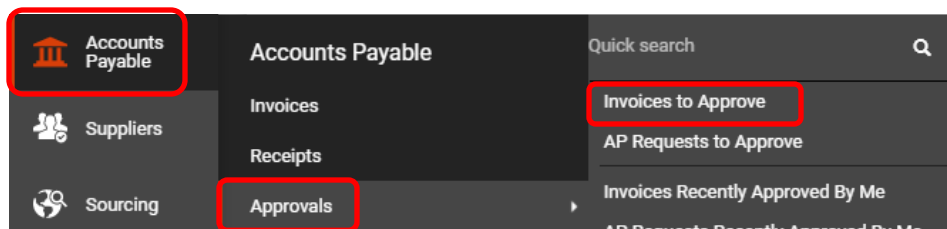
Your approval queue in BennyBuy is where documents that may require your approval will be listed. Some approval queues are shared, such as Budget Authority and Business Center queues, while other queues only have one approver listed, such as Grant Budget Authority queues.

Accessing Your Approval Queue

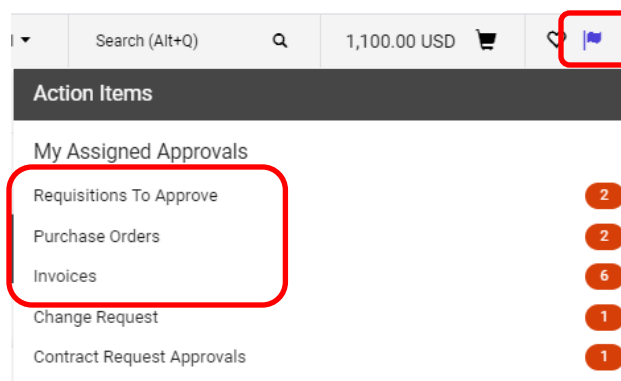
1. To access your approval queue for Requisitions and Purchase Orders, click on the **Document Search** tab located on the left side menu. Navigate to **Approvals**, then select either **Requisitions to Approve** or **Purchase Orders to Approve**.



2. To access your approval queue for Invoices, click on the **Accounts Payable** tab on the left side menu. Navigate to **Approvals**, then select **Invoices to Approve**.



3. Alternatively, you can access your approval queue for a specific document type by selecting the flag icon in the upper right hand corner and then selecting the document type.



Approval Queue Management

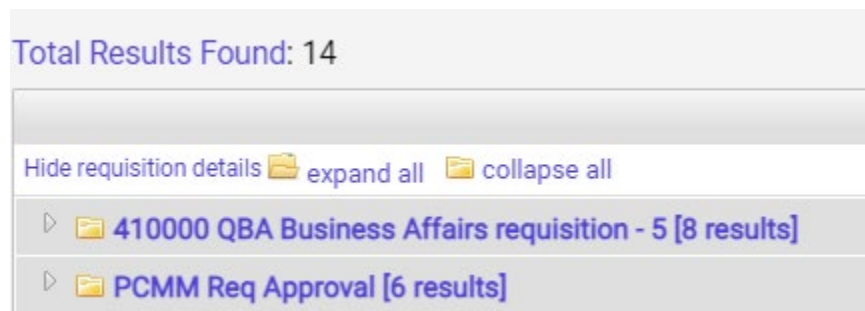
Grouping Results

1. Within the approval queue screen, click on **Group Results By** located in the top left corner of the screen.













2. Selecting **Folders** will group documents to approve by the approval folder they are listed in. Selecting **List** will show all documents needing approval, regardless of approval folder.

Folder View




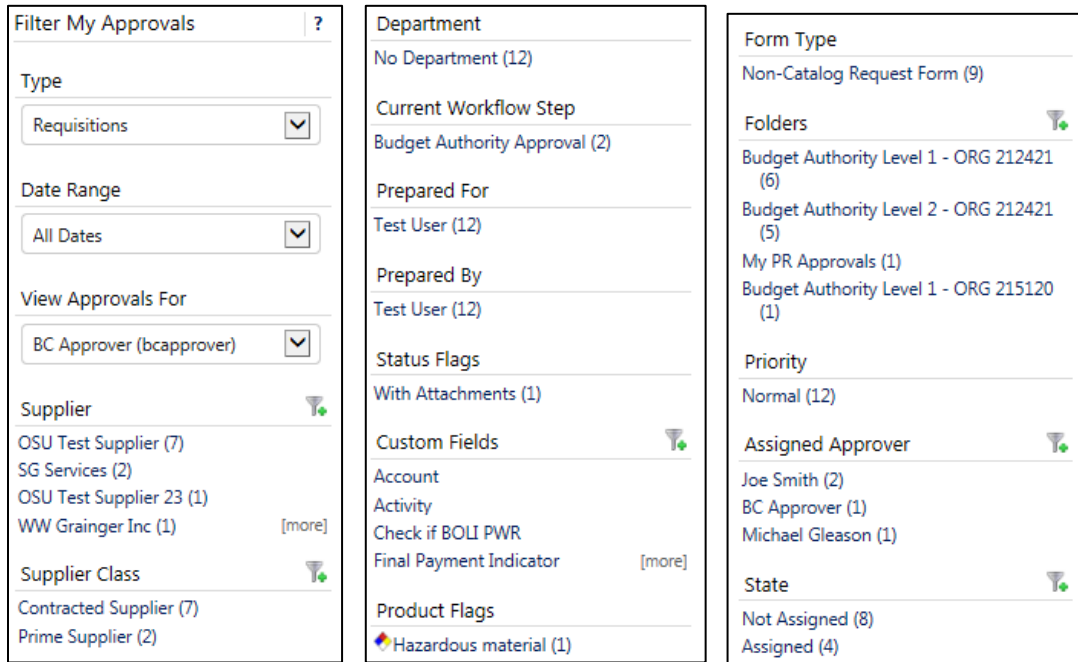
List View

Requisition No.	Suppliers:	Assigned Approver
3219242  	Stan Mikita Donuts	Not Assigned
Requisition Name	2021-03-24 byrnesl 02	
No. of line items	2	
3024993  	Stan Mikita Donuts	Not Assigned
 Resubmitted requisition		
Requisition Name	2020-07-30 byrnesl 01	
No. of line items	1	
3283989  	Stan Mikita Donuts	Not Assigned
 Resubmitted requisition		
Requisition Name	2021-06-30 byrnesl 02	
No. of line items	3	
2670495  	Gulf Island Shipyards LLC	Not Assigned
Requisition Name	2019-05-28 simsal 03	
No. of line items	2	
2670492  	Gulf Island Shipyards LLC	Not Assigned
 Resubmitted requisition		
Requisition Name	2019-05-28 simsal 02	
No. of line items	1	

Approval Queue Management

Filtering Results

1. Within the approval queue screen, you will see a list of documents requiring your approval. To refine your results, you can use the filter options located on the left side panel titled **Filter My Approvals**. Use the drop down menus or the filter  icon to refine results accordingly.

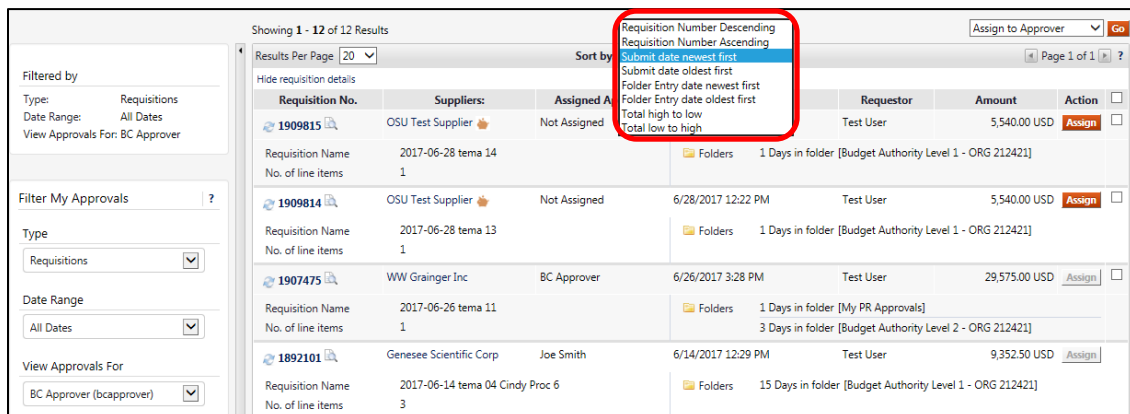


The screenshot shows the 'Filter My Approvals' sidebar with the following categories and options:

- Type:** Requisitions
- Date Range:** All Dates
- View Approvals For:** BC Approver (bcapprover)
- Supplier:** OSU Test Supplier (7), SG Services (2), OSU Test Supplier 23 (1), WW Grainger Inc (1) [more]
- Supplier Class:** Contracted Supplier (7), Prime Supplier (2)
- Department:** No Department (12)
- Current Workflow Step:** Budget Authority Approval (2)
- Prepared For:** Test User (12)
- Prepared By:** Test User (12)
- Status Flags:** With Attachments (1)
- Custom Fields:** Account, Activity, Check if BOLI PWR, Final Payment Indicator [more]
- Product Flags:** Hazardous material (1)
- Form Type:** Non-Catalog Request Form (9)
- Folders:** Budget Authority Level 1 - ORG 212421 (6), Budget Authority Level 2 - ORG 212421 (5), My PR Approvals (1), Budget Authority Level 1 - ORG 215120 (1)
- Priority:** Normal (12)
- Assigned Approver:** Joe Smith (2), BC Approver (1), Michael Gleason (1)
- State:** Not Assigned (8), Assigned (4)

Sorting Results

1. Within the approval queue screen, you will see a list of documents requiring your approval. To help refine your search, you can use the sorting options located at the top center of your screen. Sort your approval documents by clicking on the drop down menu next to **Sort By**.



The screenshot shows the main view of the approval queue. At the top, it says 'Showing 1 - 12 of 12 Results'. The 'Sort By' dropdown menu is open, showing the following options:

- Requisition Number Descending
- Requisition Number Ascending
- Submit date newest first
- Submit date oldest first
- Folder Entry date newest first
- Folder Entry date oldest first
- Total high to low
- Total low to high

The table below shows the list of requisitions:

Requisition No.	Suppliers	Assigned A	Requestor	Amount	Action
1909815	OSU Test Supplier	Not Assigned	Test User	5,540.00 USD	Assign
1909814	OSU Test Supplier	Not Assigned	Test User	5,540.00 USD	Assign
1907475	WW Grainger Inc	BC Approver	Test User	29,575.00 USD	Assign
1892101	Genesee Scientific Corp	Joe Smith	Test User	9,352.50 USD	Assign

Approval Queue Management

Multiple Document Actions

1. Within the approval queue screen, approvers have the option to interact with multiple documents. For example, if several requisitions have been reviewed, the approver can select those requisitions by checking the box on the right hand side and approve them at the same time using the available drop down menu shown below. Click **Go** once you have selected the desired action.

The screenshot shows the approval queue interface. On the left, there are filters for 'Type: Requisitions', 'Date Range: All Dates', and 'View Approvals For: Joe Smith'. The main table lists requisitions with columns for Requisition No., Suppliers, Assigned Approver, PR Date/Time, and Requestor. A dropdown menu is open over the 'Assign' button, showing options: 'Assign/Complete', 'Forward...', 'Return to Shared Folder', 'Place PR On Hold', 'Add Notes to History', and 'Assign CV2 Code'. A 'Go' button is visible at the top right of the menu.

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requestor	Amount	Action
1909815	OSU Test Supplier	Not Assigned	6/28/2017 12:23 PM	Test User		Assign
1909814	OSU Test Supplier	Not Assigned	6/28/2017 12:22 PM	Test User	5,540.00 USD	Assign
1892101	Genesee Scientific Corp	Joe Smith	6/14/2017 12:29 PM	Test User	9,352.50 USD	Assign
1858926	SG Services	Not Assigned	5/16/2017 10:48 AM	Test User	20,000.00 USD	Assign

Previewing Requisitions

1. Within the approval queue screen, you should see a list of documents requiring your approval. To preview a requisition, click the magnifying glass icon located next to the requisition number. The preview allows you to quickly review the requisition data, without having to fully open the purchase requisition.

The screenshot shows the 'My PR Approvals' section with 2 results. The first result is highlighted, and a magnifying glass icon is visible next to the requisition number 1892101. Below the table, there are fields for 'Requisition Name' and 'No. of line items'.

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requestor	Amount	Action
1892101	Genesee Scientific Corp	Joe Smith	6/14/2017 12:29 PM	Test User	9,352.50 USD	Approve

Requisition Name: 2017-06-14 tema 04 Cindy Proc 6
No. of line items: 3

2. Within the preview screen, you can **Approve** the document, if appropriate, or **Assign** it to yourself for further review.

The screenshot shows the 'Requisition Summary - 1892101' screen. At the top, there are navigation links '<Previous' and 'Next>' and a counter '0 of 14'. Below the title, there are 'Assign' and 'Approve' buttons. The summary is divided into three columns: General, Shipping, and Billing.

General	Shipping	Billing
Status: Pending Budget Authority	Ship To: Test User Cindy Proc 6 Room Department 606 SW 15TH ST Adams Hall CORVALLIS, OR 97331 United States	Bill To: Test User AABC 260 SW WEATHERFORD PL Poling Hall CORVALLIS, OR 97331 United States
Submitted: 6/14/2017 12:29 PM		
Transaction Date		
Prepared by: Test User		
Cart Name: 2017-06-14 tema 04 Cindy Proc 6		
Description		
Check if BOLI PWR: x		
Procurement Method: no value	Delivery Options	

Approval Queue Management

3. Use the **Previous** or **Next** links to allow quick navigation through the approval queue from one document to the next without exiting the preview screen.

<Previous **0 of 14** Next>

Requisition Summary - 1892101 Assign Approve

General	Shipping	Billing
Status Pending Budget Authority	Ship To Test User Cindy Proc 6 Room	Bill To Test User AABC
Submitted 6/14/2017 12:29 PM	Department 606 SW 15TH ST	260 SW WEATHERFORD PL
Transaction Date	Adams Hall	Poling Hall
Prepared by Test User	CORVALLIS, OR 97331	CORVALLIS, OR 97331
Cart Name 2017-06-14 tema 04 Cindy Proc 6	United States	United States
Description		
Check if BOLI PWR x	Delivery Options	
Procurement Method no value		

4. To open a document from the preview window, click the document number next to **Summary**.

<Previous **0 of 14** Next>

Requisition Summary **1892101** Assign Approve

General	Shipping	Billing
Status Pending Budget Authority	Ship To Test User Cindy Proc 6	Bill To Test User

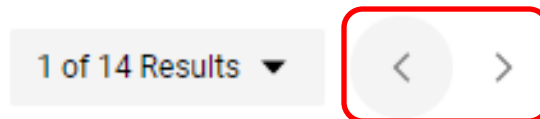
Navigating Through Multiple Documents

1. Within the approval queue screen, open the desired document by clicking on the document number.

My PR Approvals [3 results]

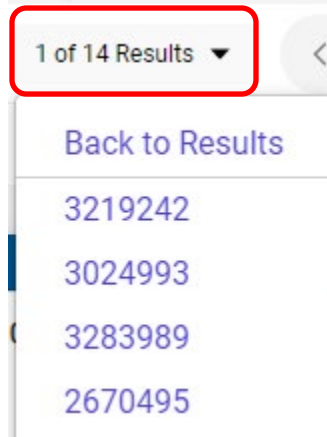
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requestor	Amount	Action
1858036	Bio Rad Laboratories Inc VWR International LLC	Rebecca Levernier	5/15/2017 6:38 PM	Test User	6,397.89 USD	Approve
Requisition Name	2017-05-15 tema 08		Folders	0 Days in folder [My PR Approvals]		
No. of line items	3					

2. To page through the previous or next document in your approval queue without leaving the document summary page, click the arrows at the top right of the screen to help navigate.



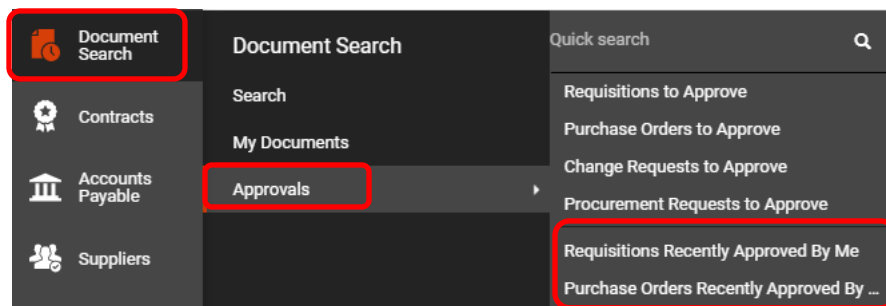
Approval Queue Management

- Alternatively, you can navigate directly to a desired document by using the drop down menu under the results tab. Select the document number to navigate to that specific document, or select **Back to Results** to take you back to your approval queue.

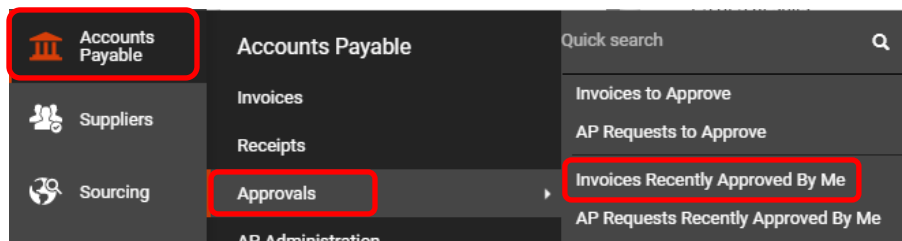


View Recent and Past Approvals

- To access recently approved requisitions or purchase orders, click on the **Document Search** tab located on the left side menu. Navigate to **Approvals** and select **Requisitions Recently Approved By Me** or **Purchase Orders Recently Approved By Me**.



- To access recently approved invoices, click on the **Accounts Payable** tab on the left side menu. Navigate to **Approvals** and select **Invoices Recently Approved By Me**.



Approval Queue Management

3. Depending on the document type chosen, a list of results will appear.

Invoice Number	My Action	My Approval Date/Time	My Workflow Steps	Supplier Invoice Number(s)	Supplier	Invoiced By	Total Amount
IB000748	Invoice Approved	6/22/2021 4:26:45 PM	Matching Exceptions - BC	123456	Stan Mikita Donuts	Lane Byrnes	6,485.00 USD
IB000733	Invoice Rejected My Other Actions	6/22/2021 3:58:27 PM	Matching Exceptions - BC	Invoice1	Stan Mikita Donuts	Lane Byrnes	0.00 USD
IB000571	Invoice Approved	6/29/2021 10:20:03 AM	Non-PO Invoice Owner Approval	asf	Alex's Awesome Air Balloons INC	Lane Byrnes	1,500.00 USD

4. This search does have a default filter for an approved date in the last 30 days. To change this click the filter and choose your desired date range. Click **Apply**.

Created Date: All ▾ Quick search

Approved Date: Last 30 days ▾ ✕ Approved By: Byrnes, Lane ▾ ✕

All

Within Last 30 days ▾

Between [] and []

[more options >](#)

Apply Cancel