Approving or Returning a Requisition

If you are a departmental or special approver, you will receive an email notification when a requisition is awaiting your approval. You have the option of acting on the requisition in BuyWays or in the email message, once you have entered a password for this purpose in the BuyWays Profile.

Follow the steps below to access the requisition in BuyWays:
- Under Notifications on the top right menu of the Home/Shop page
- Under Action Items on the top right menu of the Home/Shop page

Once you have reviewed the requisition, you may send a comment to the requisitioner or approve the requisition or return it to the requisitioner for further attention. The requisitioner will be notified by email when you have acted on the requisition. If you choose not to act on a requisition that you have assigned to yourself, you should return it to a shared folder for another approver to access.

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<thead>
<tr>
<th>Step</th>
<th>Action</th>
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| 1.   | Log in to BuyWays  
- Navigate to UMass BuyWays (www.umb.edu/it > Getting Services > Campus Administrative Systems)  
- Click on BuyWays Production in the center of the page.  
- Enter your campus email user ID (firstname.lastname only) and password.  
- Select the Boston campus.  
- Click Login.  
  
The BuyWays Home/Shop page will open. |
### Step 2: Option 1: Notifications

Click **Notifications** in the menu at the top right corner of the page.

Once you receive an email notification that a requisition is awaiting your approval, the same notification will appear in the Notifications menu.

**Notifications will be automatically removed after 30 days. A notification will also disappear once you have accessed it in this list.**

Click on the requisition you wish to review.

The requisition summary page will open.
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|      | **If you are ready to approve the requisition:**  
|      | • Click on the **Available Actions** dropdown menu in the top right and select **Approve/complete step**  
|      | • Click on **Go**. |

If you do not want to approve the requisition:

• Click on the **Available Actions** dropdown menu in the top right and select **Assign to myself**.  
• Click **Go**.  
• Go to **Step 5** to return the requisition or send a comment to the requisitioner or return the requisition to a shared folder for another approver to review.
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| 3.   | **Option 2: Action Items**  
Click **Action Items** in the menu on the top right corner of the page.  

![Action Items](image)

Under **Unassigned Approvals**, click **Unassigned Requisitions Needing Approval**.  

The **My Approvals** page will open.  

A folder or a list of folders containing requisitions awaiting your attention will be displayed. Each folder is identified by a department number, a fund code or a commodity code.  

You may click on the **Sort by** dropdown menu to change the sort order of the requisitions.  

![Sort by](image)

Click on a folder to expand it.  

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<td>4.</td>
<td><strong>Assign the Requisition to Yourself</strong></td>
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<tr>
<td></td>
<td>Locate the requisition you wish to review.</td>
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<td></td>
<td>Click on Assign at the far right of the requisition row to prevent any other approver from acting on this requisition.</td>
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<td>Click on the <strong>requisition number</strong> to display the requisition.</td>
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5. **Approve or Return the Requisition**

After you have reviewed the requisition, you may take one of the following actions:

- Send a comment to the requisitioner.
- Approve the requisition.
- Return the requisition to the approver for further action.
- Return the requisition to the shared folder for action by another approver.

**Important:** Do not select Reject Requisition as this will cancel the requisition.

### **Send a Comment**

If, after reviewing the requisition, you have a question or comment for the requisitioner, click on the gray **Comments** tab at the top left.

Click **Add Comment**.

Click the checkbox to send your comment in an email to the requisitioner. You may also click to send a copy of the message to yourself.

If you wish to send the message to anyone else in the BuyWays system, click **add email recipient**.

Enter search criteria and click **Search**.

Locate the desired recipient and click **Select**.

Enter your comment in the text box.

Click **Add Comment**.

The requisitioner will receive an email containing your comments. If the requisitioner replies to your email, the requisitioner’s comments will be attached, with yours, to the requisition.
Approving or Returning a Requisition

Approve the Requisition
Click on the Available Actions dropdown menu on the top right of the Approvals tab.
Click Approve/Complete Step.
Click Go.

Return the Requisition to the Requisitioner
Click on the Available Actions dropdown menu on the top right of the Approvals tab.
Click Return to Requisitioner.
Important: Do not select Reject Requisition, as this will cancel the requisition.
Click Go.

The Return to Requisitioner box will appear.
Enter your reasons for returning the requisition.
Click Return to Requisitioner.
A message containing your comment will be sent to the requisitioner.
You will be returned to the Comments tab.
Return the Requisition to the Shared Folder
If, after assigning the requisition to yourself, you decide not to take action on it, you should return the requisition to the shared folder so that another approver can act on it.

If you are viewing the requisition in the My Approvals page:
- Click the Available Actions dropdown menu in the top right.
- Click on Return to Shared Folder
- Click Go.

If you are not currently viewing the requisition:
- Click the Action Items menu on the top right corner of the page.
- Click the Requisitions to Approve under My Assigned Approvals.
- Any requisitions currently assigned to you will appear in the My PR Approvals folder.
- Locate the requisition and click in the checkbox to the far right to select it.
- Click on the Assign dropdown menu at the top right and select Return to Shared Folder.
- Click Go.

The requisition will now be returned to the Unassigned Approvals folder for another approver to access.