Toolbox: Approving a Purchase Requisition

After logging in to Deacon Depot, navigate to the Approvals screen. This is found under the 3 papers icon on the left side of the screen. When the fly-out menu displays, select Approvals on the left side of the fly-out menu, then click on ‘My Approvals’ on the right.

Departmental or Fund folders that an approver is assigned to will display in a collapsed format.

Expand a folder to view its contents by clicking the twisty to the left of the folder title.

After expanding the folder, click ‘Assign’ on the right to assign the PR to yourself.
Once you have assigned a PR to yourself, the ‘My PR Approvals’ folder will display.

After expanding the ‘My PR Approvals’ folder, an ‘Approve’ button will display. NOTE: Clicking this button will approve the PR immediately, without opening it for review.

It is recommended that all PRs be reviewed prior to approving. To review the PR, click the Requisition number on the left side of the screen.

Upon clicking the requisition number, the PR summary will display.

If changes need to be made to the PR while reviewing, click the edit button within a particular PR section to make any necessary changes. Items to review include: Shipping Address, Accounting Codes, Internal & External notes & attachments, Individual line items.
To edit individual line items, check the select box above the line, choose the desired action from the drop-down menu, and click the “Go” button.

After reviewing and editing the requisition, use the Available Actions drop-down menu in the upper right-hand corner of the screen to perform a number of approval-related functions.

If changes are made, it is recommended to enter a comment to explain the change.

To Approve the requisition, select “Approve/Complete Step” and click “Go”.

To approve a Purchase Requisition by email: First, set your email approval code in the Profile section of Deacon Depot. For assistance in how to do this, use the ‘Setting an Email Approval Code’ quick guide.
When an approval notification email is received. Review all the information in the email. If no changes are needed, click the “Take Action” button.

Note: If changes are necessary, you must click the link at the bottom of the email to log in to Deacon Depot and edit the requisition as indicated in the steps above.

Select the appropriate action by clicking one of the radio buttons.

Enter your approval code and click “Submit”.

The following screen will appear and indicates the completion of the approval workflow.