



RowanUniversity

**Approver Role Guide**  
**Rowan ProConnect**

# Approver Overview

## How to view and approve Requisitions

As an Approver you will review Requisitions assigned to you and determine if the Requisition should be approved, returned, or rejected.

The Approver must be familiar with Rowan's procurement practices and policies which apply to the requisitions they process. They must also be familiar with the department's workflow. The Approver will review all information on the Requisition for accuracy, add comments or notes needed, and approve, return, or reject the Requisition. The Approver makes the final determination (unless there are more approvers needed later in the workflow) of the Requisition being approved and the Purchase Order being created.

If the Approver does not feel they are the best suited for the approval they can assign a substitute Approver to take over in the approval workflow. Only a user with an Approver role can be assigned as a substitute approver to approve on their behalf.

This reference guide is intended to illustrate the process of approving Requisitions and provide commentary.

## Best Practices

- Ensure all information entered on the requisition is accurate and complete including item descriptions, quantities, pricing, accounting codes, and any necessary documentation.
- Stay informed on Rowan procurement policies to ensure all information on the requisition abides to those policies.
- An approver cannot approve their own orders, even if they have both the Requisitioner and Approver role.
- Communicate with requesters on any missing information or documentation in a timely manner so the approval process is not slowed.
- After placing an Order, check the status of your Order from any screen, by clicking on the Orders icon and browsing to My Orders > My Purchase Orders.
- Return Requisitions to Requisitioners when information has not been entered correctly or additional information is needed so they can update and resubmit.
- When a Requisition does not need to be returned add comments to the requisition.
- Only reject a Requisition if it is absolutely necessary. Rejecting a Requisition is permanent and cannot be reversed. If updates are needed to a Requisition return the Requisition instead of rejecting it.

*Note: Based on the selections you make in certain fields, other fields may or may not be visible. If you do not see a field on your request form that is in the below guide that is because the visibility on that field was not triggered, meaning you can continue completing your request.*

# Approver Dashboard

Rowan University
All
Search (Alt+Q)
0.00 USD
13

Dashboards • Approver Dashboard
Accounts Payable Dashboard
**Approver Dashboard**
Contracts Dashboard
Shopping Home

Action Items

**MY ASSIGNED APPROVALS**

[Purchase Orders](#) 4

**UNASSIGNED APPROVALS**

[Requisitions](#) 7

[Purchase Orders](#) 1

[Change Request](#) 1

Approvals

Showing Results 1 - 5 of 12
5 Per Page

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER ↑
Requisitions	Number: 4172525 Name: 2024-11-27 915794113 01	Fund Org - PURCHASING -- 31010	6
Requisitions	Number: 4172631 Name: 2024-11-27 915794113 02	Fund Org - ROWAN GLOBAL, INC. - 99100 - 29999	6
Purchase Order	Number: 4178612 <i>no value</i>	2 Folders	7
Requisitions	Number: 4171329 Name: 2024-11-25 916357939 01	2 Folders	8
Requisitions	Number: 4171405 Name: 2024-11-25 916159424 02	3 Folders	8

Quick Links

- [Purchase Orders](#)
- [Search For Invoices](#)
- [Requisitions to Approve](#)
- [Purchase Orders to Approve](#)
- [Invoices to Approve](#)
- [Procurement Requests to Approve](#)
- [Change Requests to Approve](#)
- [Search for a Vendor](#)
- [Contract Requests to Approve](#)
- [Contracts to Approve](#)
- [Contracts that Require Attention: Expiring Contracts](#)
- [Search Contracts](#)
- [Contract Requests Recently Approved By Me](#)

Shop

Simple
Advanced
Go to: [Favorites](#) | [Forms](#) | [Non-Catalog Item](#) | [Quick Order](#)
Browse: [Vendors](#) | [Categories](#) | [Contracts](#)

**Approvals:**

- All pending approvals will populate here.
- Use the filter icon to filter by Approval Type, Only My Approvals or Group by Folder

**Action Items, Notifications, Profile:**

- Access your Profile, any Notifications, or Action Items with the Flag, Bell, and User icons.

**Action Items:**

- Items awaiting your action will display here such as unassigned carts, incomplete carts, and incomplete requests.

**Shop:**

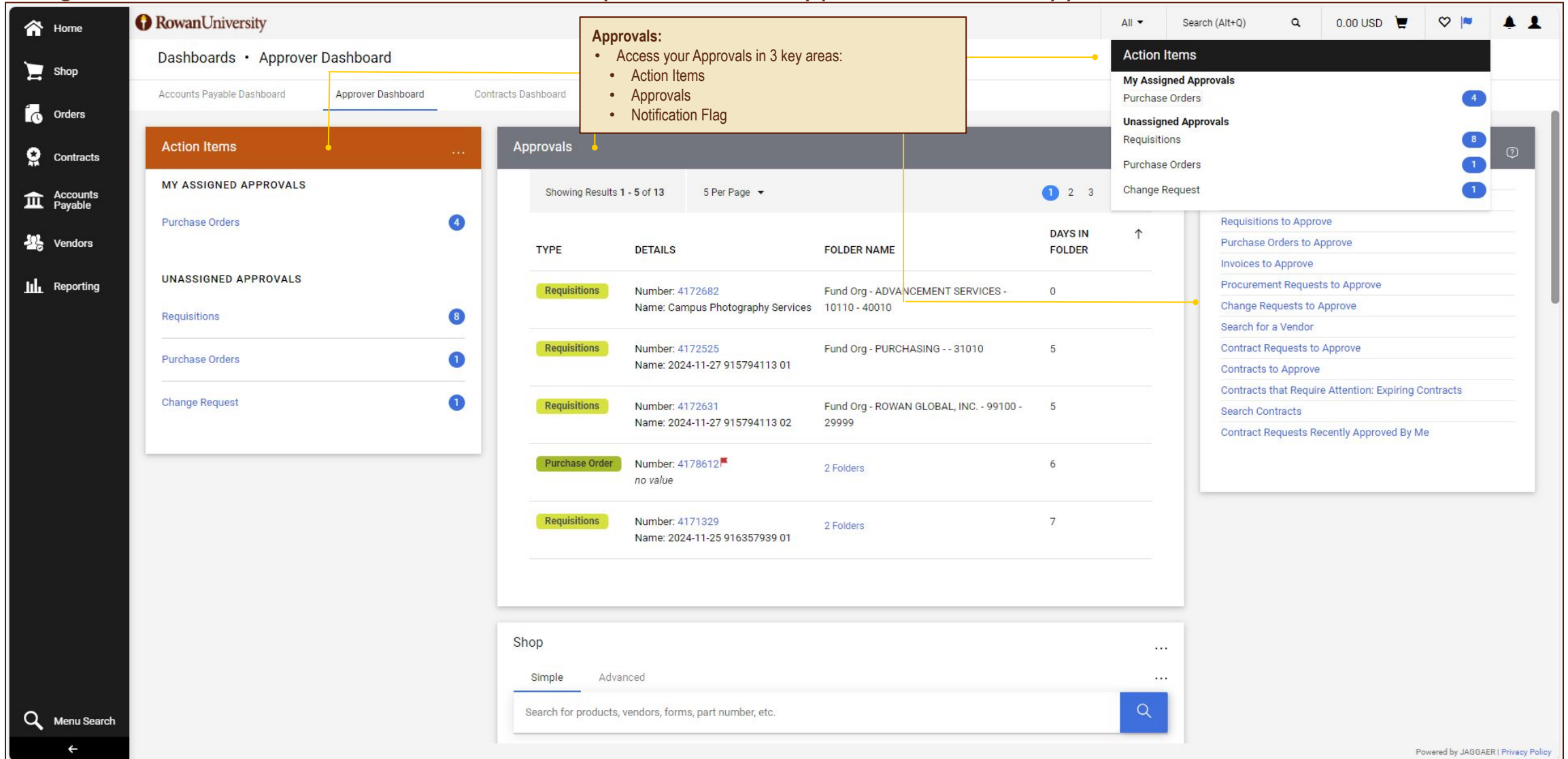
- Use the Simple or Advanced Search to search for goods and services
- Use the Quick Links on the right to access key areas

**Quick Links:**

- Use the Quick Links to swiftly access key pages used for requests or status on items in process.

# Step by Step

**1. Action Items & Notifications** - Select the *Assigned Approval* under *Action Items* on the dashboard or from the *Notification Flag* or *Quick Links*. You can also select the specific item to approve under the *Approvals* section of the dashboard.



**Approvals:**

- Access your Approvals in 3 key areas:
- Action Items
- Approvals
- Notification Flag

**Table Data:**

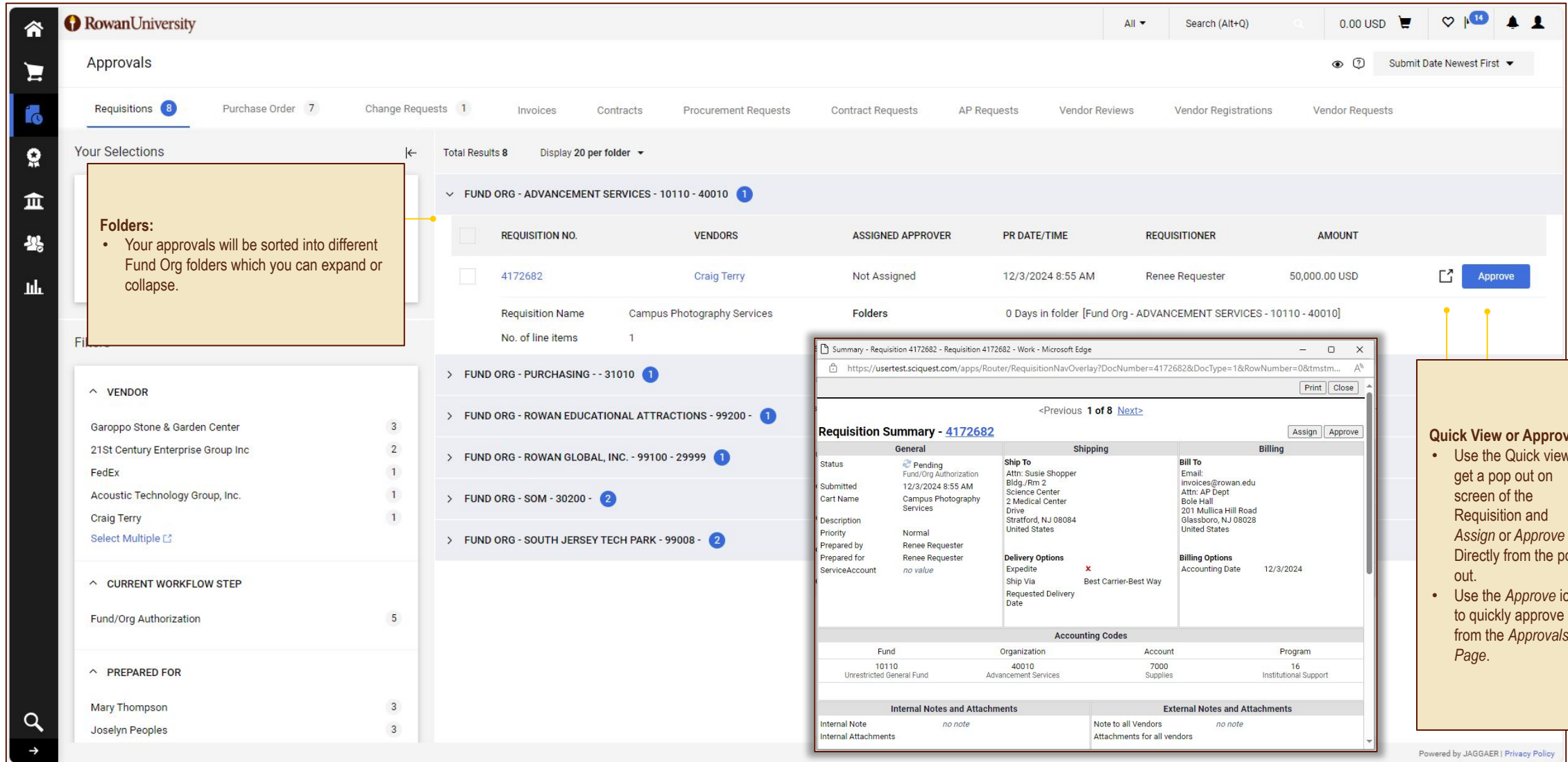
TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER
Requisitions	Number: 4172682 Name: Campus Photography Services	Fund Org - ADVANCEMENT SERVICES - 10110 - 40010	0
Requisitions	Number: 4172525 Name: 2024-11-27 915794113 01	Fund Org - PURCHASING - - 31010	5
Requisitions	Number: 4172631 Name: 2024-11-27 915794113 02	Fund Org - ROWAN GLOBAL, INC. - 99100 - 29999	5
Purchase Order	Number: 4178612 no value	2 Folders	6
Requisitions	Number: 4171329 Name: 2024-11-25 916357939 01	2 Folders	7

**Navigation and Callouts:**

- Left Sidebar:** Home, Shop, Orders, Contracts, Accounts Payable, Vendors, Reporting, Menu Search.
- Top Bar:** Rowan University, Dashboards (Accounts Payable Dashboard, Approver Dashboard, Contracts Dashboard), Search (Alt+Q), 0.00 USD, User Profile.
- Callout Box:** Approvals: Access your Approvals in 3 key areas: Action Items, Approvals, Notification Flag.
- Action Items Panel:** MY ASSIGNED APPROVALS (Purchase Orders: 4), UNASSIGNED APPROVALS (Requisitions: 8, Purchase Orders: 1, Change Request: 1).
- Approvals Table:** Showing Results 1 - 5 of 13, 5 Per Page.
- Right Panel:** Action Items, My Assigned Approvals (Purchase Orders: 4), Unassigned Approvals (Requisitions: 8, Purchase Orders: 1, Change Request: 1), Requisitions to Approve, Purchase Orders to Approve, Invoices to Approve, Procurement Requests to Approve, Change Requests to Approve, Search for a Vendor, Contract Requests to Approve, Contracts to Approve, Contracts that Require Attention: Expiring Contracts, Search Contracts, Contract Requests Recently Approved By Me.
- Bottom Panel:** Shop (Simple/Advanced), Search for products, vendors, forms, part number, etc.

# Step by Step

**2. My Approvals Page** - Your *Approvals* page will allow you to access any approvals assigned to you for *Requisitions, Purchase Orders, Change Requests, and Invoices*.

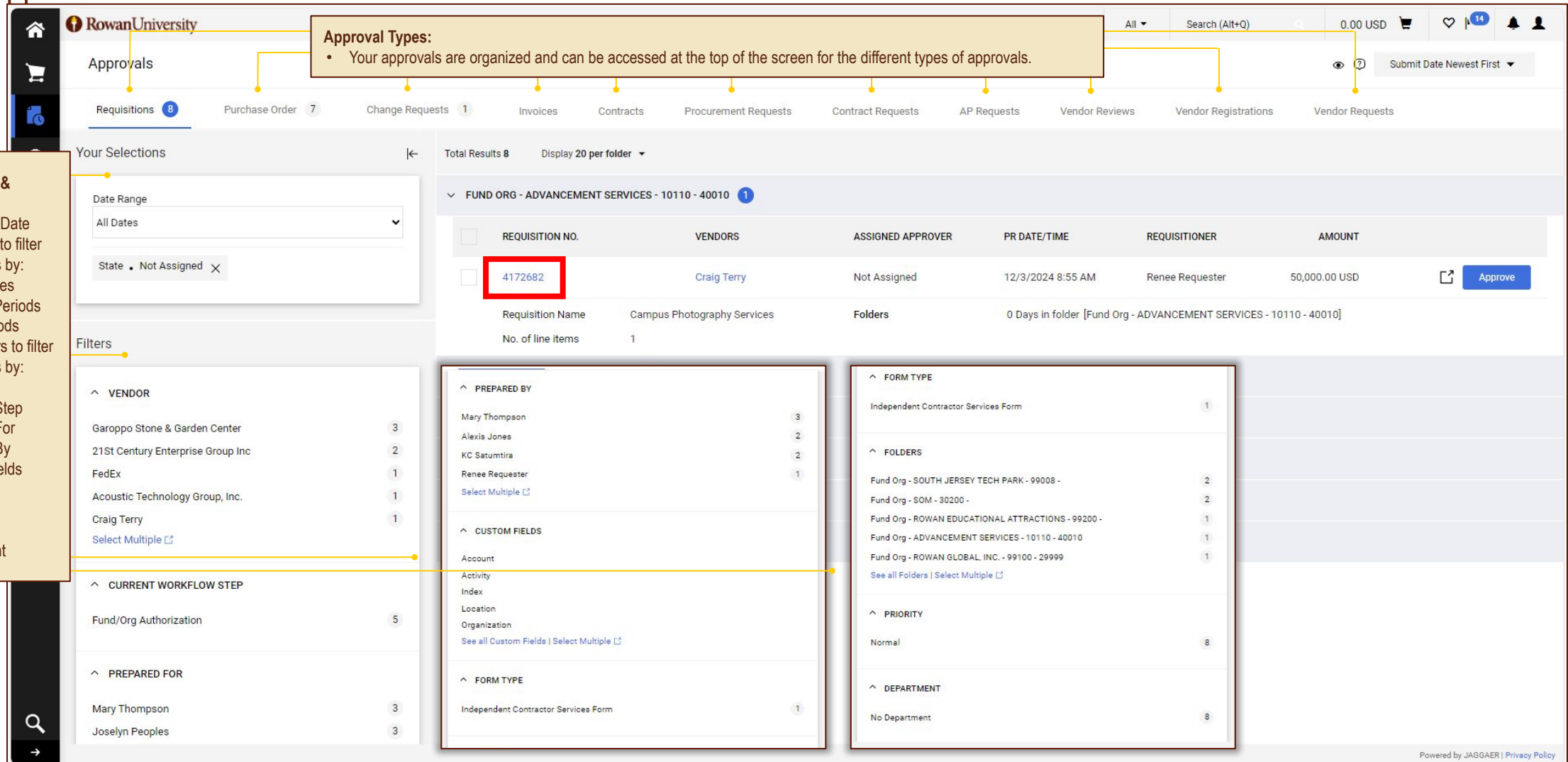


The screenshot displays the 'Approvals' page in the Rowan University system. The page is divided into several sections:

- Navigation Bar:** Includes the Rowan University logo, search bar, currency (0.00 USD), and user profile.
- Approvals Filter:** Shows 'Requisitions' with 8 items, and other categories like Purchase Order (7), Change Requests (1), etc.
- Your Selections:** A sidebar on the left with a 'Folders' section. A callout box explains: 'Folders: Your approvals will be sorted into different Fund Org folders which you can expand or collapse.' Below this are lists for 'VENDOR' (Garoppo Stone & Garden Center, 21st Century Enterprise Group Inc, FedEx, Acoustic Technology Group, Inc., Craig Terry) and 'PREPARED FOR' (Mary Thompson, Joselyn Peoples).
- Main Table:** Displays a list of requisitions. The first entry is for 'FUND ORG - ADVANCEMENT SERVICES - 10110 - 40010' with 1 requisition. The table columns are: REQUISITION NO., VENDORS, ASSIGNED APPROVER, PR DATE/TIME, REQUISITIONER, and AMOUNT. The entry for 4172682 is by 'Craig Terry' and is 'Not Assigned'.
- Requisition Summary Popout:** A detailed view for requisition 4172682. It includes:
  - General:** Status (Pending), Submitted (12/3/2024 8:55 AM), Description (Campus Photography Services).
  - Shipping:** Ship To (Susie Shopper, Science Center, 2 Medical Center Drive, Stratford, NJ 08084), Delivery Options (Expedite, Best Carrier-Best Way).
  - Billing:** Bill To (invoices@rowan.edu, 201 Mullica Hill Road, Glassboro, NJ 08028), Billing Options (Accounting Date: 12/3/2024).
  - Accounting Codes:** Fund (10110 - Unrestricted General Fund), Organization (40010 - Advancement Services), Account (7000 - Supplies), Program (16 - Institutional Support).
  - Internal Notes and Attachments:** Internal Note (no note), Internal Attachments.
  - External Notes and Attachments:** Note to all Vendors (no note), Attachments for all vendors.
- Quick View or Approve Callout:** A box on the right explains: 'Quick View or Approve: Use the Quick view to get a pop out on screen of the Requisition and Assign or Approve Directly from the pop out. Use the Approve icon to quickly approve from the Approvals Page.'

# Step by Step

**3. Navigating and Filtering** - Use *Filters* to filter your approvals by *Vendor*, *Current Workflow Step*, *Prepared By*, and *Owner*. Navigate to different approvals using the top bar and Approve from this screen or navigate to the page of what needs to be approved.



**Approval Types:**

- Your approvals are organized and can be accessed at the top of the screen for the different types of approvals.

**Your Selections & Filters:**

- Use different Date Range filters to filter the approvals by:
  - Date Ranges
  - Calendar Periods
  - Fiscal periods
- Use the Filters to filter the approvals by:
  - Vendor
  - Workflow Step
  - Prepared For
  - Prepared By
  - Custom Fields
  - Form Type
  - Folders
  - Priority
  - Department

**Approval Types:**

- Requisitions 8
- Purchase Order 7
- Change Requests 1
- Invoices
- Contracts
- Procurement Requests
- Contract Requests
- AP Requests
- Vendor Reviews
- Vendor Registrations
- Vendor Requests

**Your Selections**

Total Results 8    Display 20 per folder

▼ FUND ORG - ADVANCEMENT SERVICES - 10110 - 40010 1

REQUISITION NO.	VENDORS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT	
<input type="checkbox"/> 4172682	Craig Terry	Not Assigned	12/3/2024 8:55 AM	Renee Requester	50,000.00 USD	<a href="#">Approve</a>

Requisition Name    Campus Photography Services    **Folders**    0 Days in folder [Fund Org - ADVANCEMENT SERVICES - 10110 - 40010]

No. of line items    1

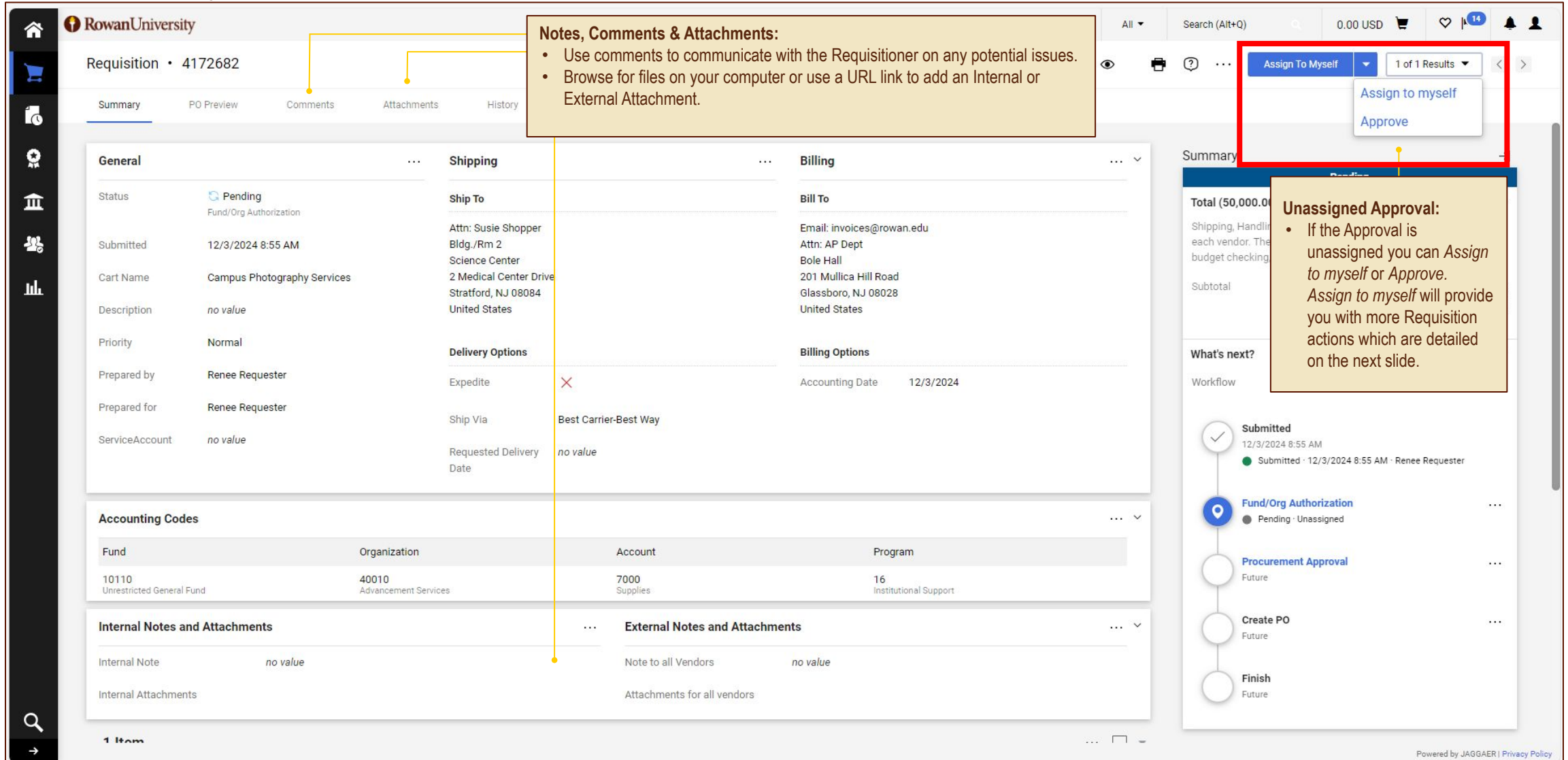
**Filters**

- VENDOR**
  - Garoppo Stone & Garden Center 3
  - 21St Century Enterprise Group Inc 2
  - FedEx 1
  - Acoustic Technology Group, Inc. 1
  - Craig Terry 1
  - [Select Multiple](#)
- CURRENT WORKFLOW STEP**
  - Fund/Org Authorization 5
- PREPARED FOR**
  - Mary Thompson 3
  - Joselyn Peoples 3
- PREPARED BY**
  - Mary Thompson 3
  - Alexis Jones 2
  - KC Satumira 2
  - Renee Requester 1
  - [Select Multiple](#)
- CUSTOM FIELDS**
  - Account
  - Activity
  - Index
  - Location
  - Organization
  - [See all Custom Fields | Select Multiple](#)
- FORM TYPE**
  - Independent Contractor Services Form 1
- FOLDERS**
  - Fund Org - SOUTH JERSEY TECH PARK - 99008 - 2
  - Fund Org - SOM - 30200 - 2
  - Fund Org - ROWAN EDUCATIONAL ATTRACTIONS - 99200 - 1
  - Fund Org - ADVANCEMENT SERVICES - 10110 - 40010 1
  - Fund Org - ROWAN GLOBAL, INC. - 99100 - 29999 1
  - [See all Folders | Select Multiple](#)
- PRIORITY**
  - Normal 8
- DEPARTMENT**
  - No Department 8

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# Step by Step

## 4. Navigate the Requisition- Review all details of the requisition including *General, Shipping, Billing, Accounting, Item details*, and any notes and attachments.



**Notes, Comments & Attachments:**

- Use comments to communicate with the Requisitioner on any potential issues.
- Browse for files on your computer or use a URL link to add an Internal or External Attachment.

**Unassigned Approval:**

- If the Approval is unassigned you can *Assign to myself* or *Approve*. *Assign to myself* will provide you with more Requisition actions which are detailed on the next slide.

**Requisition Details:**

Requisition • 4172682

Summary | PO Preview | Comments | Attachments | History

**General**

Status: Pending  
Fund/Org Authorization

Submitted: 12/3/2024 8:55 AM

Cart Name: Campus Photography Services

Description: no value

Priority: Normal

Prepared by: Renee Requester

Prepared for: Renee Requester

ServiceAccount: no value

**Shipping**

Ship To:

Attn: Susie Shopper  
Bldg./Rm 2  
Science Center  
2 Medical Center Drive  
Stratford, NJ 08084  
United States

Delivery Options:

Expedite:

Ship Via: Best Carrier-Best Way

Requested Delivery Date: no value

**Billing**

Bill To:

Email: invoices@rowan.edu  
Attn: AP Dept  
Bole Hall  
201 Mullica Hill Road  
Glassboro, NJ 08028  
United States

Billing Options:

Accounting Date: 12/3/2024

**Accounting Codes**

Fund	Organization	Account	Program
10110 Unrestricted General Fund	40010 Advancement Services	7000 Supplies	16 Institutional Support

**Internal Notes and Attachments**

Internal Note: no value

Internal Attachments:

**External Notes and Attachments**

Note to all Vendors: no value

Attachments for all vendors:

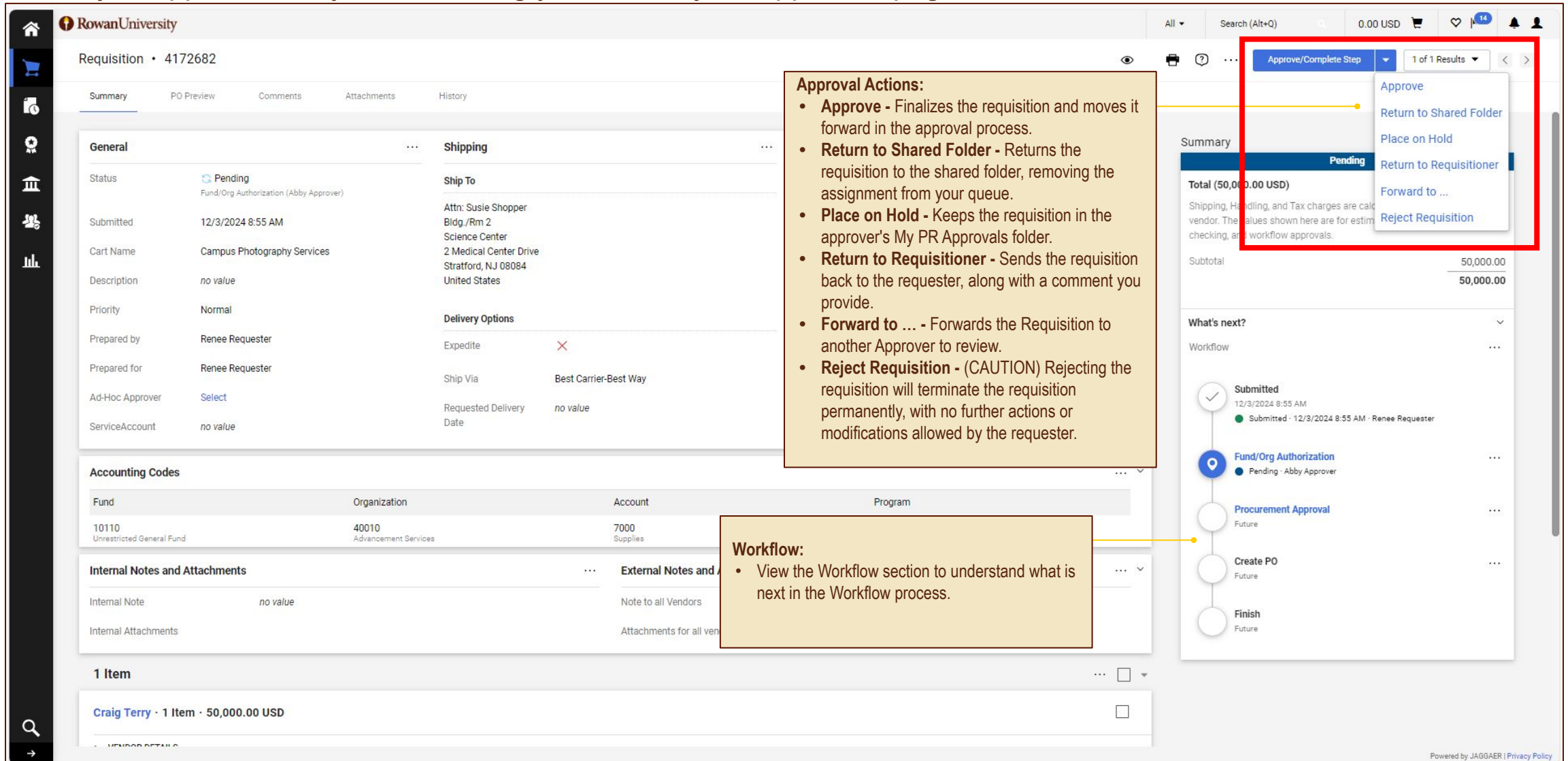
**Workflow:**

- Submitted: 12/3/2024 8:55 AM
- Fund/Org Authorization: Pending - Unassigned
- Procurement Approval: Future
- Create PO: Future
- Finish: Future



# Step by Step

**5. Complete the Requisition** - Once all details have been reviewed you will complete the requisition using one of the *actions*. Once you *Approve* the system will bring you back to your Approvals page.



**Approval Actions:**

- **Approve** - Finalizes the requisition and moves it forward in the approval process.
- **Return to Shared Folder** - Returns the requisition to the shared folder, removing the assignment from your queue.
- **Place on Hold** - Keeps the requisition in the approver's My PR Approvals folder.
- **Return to Requisitioner** - Sends the requisition back to the requester, along with a comment you provide.
- **Forward to ...** - Forwards the Requisition to another Approver to review.
- **Reject Requisition** - (CAUTION) Rejecting the requisition will terminate the requisition permanently, with no further actions or modifications allowed by the requester.

**Workflow:**

- View the Workflow section to understand what is next in the Workflow process.

**Requisition Details:**

Requisition • 4172682

Status: Pending (Fund/Org Authorization (Abby Approver))

Submitted: 12/3/2024 8:55 AM

Cart Name: Campus Photography Services

Description: no value

Priority: Normal

Prepared by: Renee Requester

Prepared for: Renee Requester

Ad-Hoc Approver: Select

ServiceAccount: no value

**Shipping:**

Ship To: Attn: Susie Shopper, Bldg /Rm 2, Science Center, 2 Medical Center Drive, Stratford, NJ 08084, United States

Delivery Options: Expedite (X), Ship Via: Best Carrier-Best Way, Requested Delivery Date: no value

**Accounting Codes:**

Fund	Organization	Account	Program
10110 Unrestricted General Fund	40010 Advancement Services	7000 Supplies	

**Internal Notes and Attachments:**

Internal Note: no value

Internal Attachments: no value

**1 Item:**

Craig Terry • 1 Item • 50,000.00 USD

**Summary:**

Total (50,000.00 USD)

Subtotal: 50,000.00

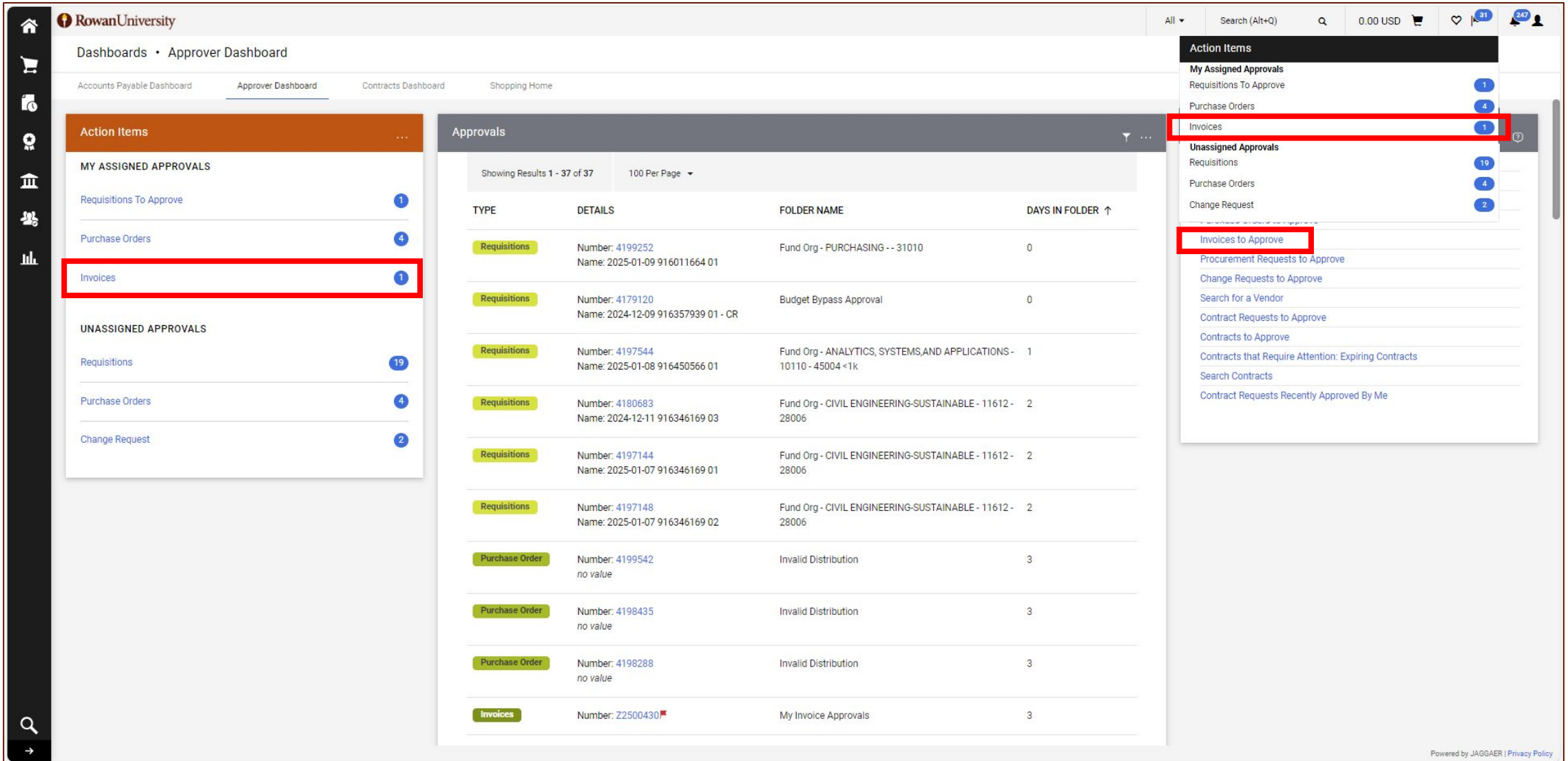
**What's next?**

Workflow:

- Submitted (12/3/2024 8:55 AM)
- Fund/Org Authorization (Pending - Abby Approver)
- Procurement Approval (Future)
- Create PO (Future)
- Finish (Future)

# Step by Step

**6a. Invoice Approval** - From your dashboard navigate to invoices assigned to you through the *Action Items* or *Quick Links* widget on your dashboard or the *Action Items* notification flag and select *Invoices* from *My Assigned Approvals*.



The screenshot displays the 'Approver Dashboard' with the following components:

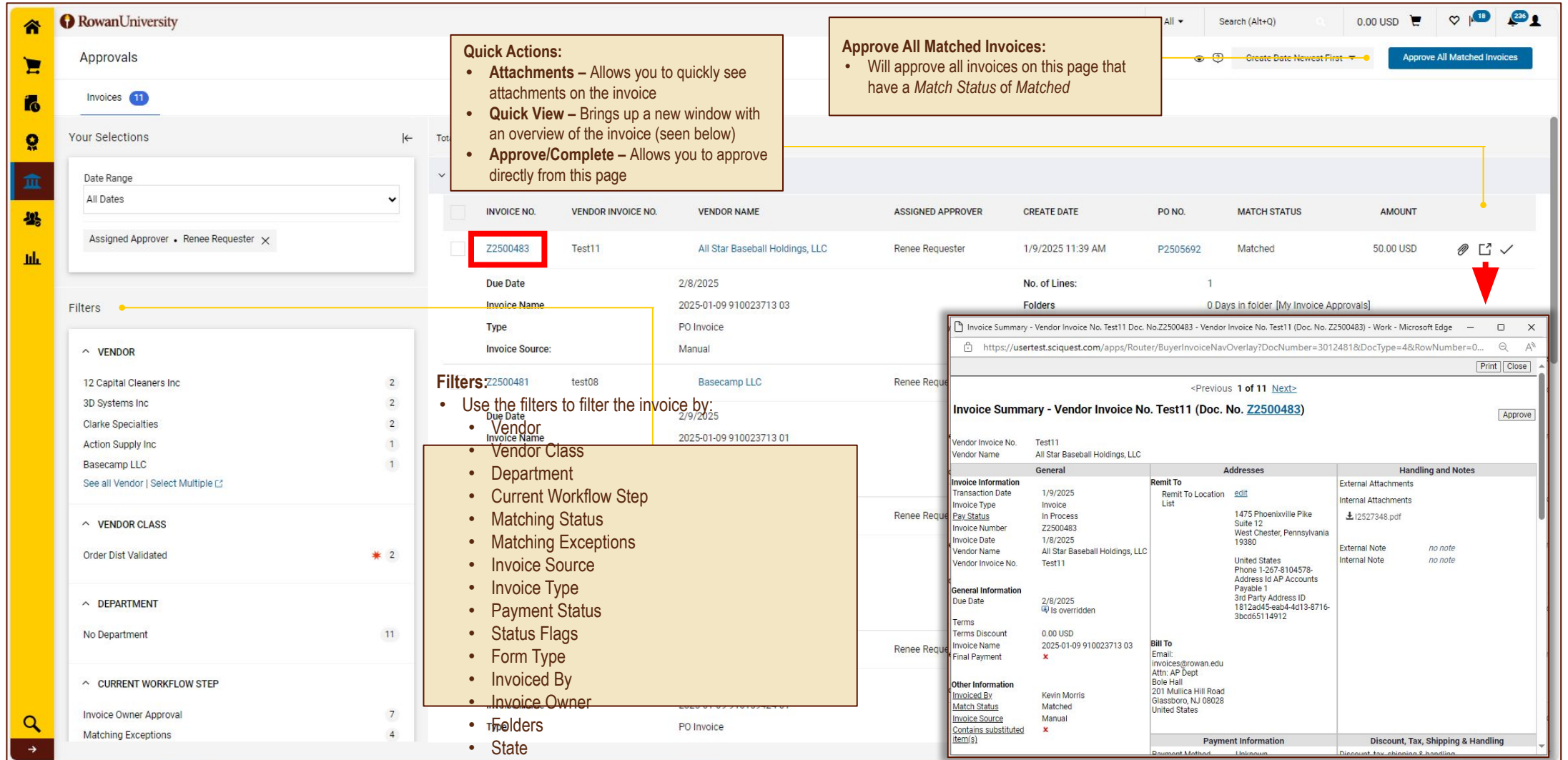
- Navigation:** Home, Accounts Payable Dashboard, Approver Dashboard (selected), Contracts Dashboard, Shopping Home.
- Left Sidebar (Action Items):**
  - MY ASSIGNED APPROVALS: Requisitions To Approve (1), Purchase Orders (4), **Invoices (1)** (highlighted).
  - UNASSIGNED APPROVALS: Requisitions (19), Purchase Orders (4), Change Request (2).
- Main Content (Approvals Table):**

Showing Results 1 - 37 of 37 | 100 Per Page

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER ↑
Requisitions	Number: 4199252 Name: 2025-01-09 916011664 01	Fund Org - PURCHASING - - 31010	0
Requisitions	Number: 4179120 Name: 2024-12-09 916357939 01 - CR	Budget Bypass Approval	0
Requisitions	Number: 4197544 Name: 2025-01-08 916450566 01	Fund Org - ANALYTICS, SYSTEMS, AND APPLICATIONS - 10110 - 45004 <1k	1
Requisitions	Number: 4180683 Name: 2024-12-11 916346169 03	Fund Org - CIVIL ENGINEERING-SUSTAINABLE - 11612 - 28006	2
Requisitions	Number: 4197144 Name: 2025-01-07 916346169 01	Fund Org - CIVIL ENGINEERING-SUSTAINABLE - 11612 - 28006	2
Requisitions	Number: 4197148 Name: 2025-01-07 916346169 02	Fund Org - CIVIL ENGINEERING-SUSTAINABLE - 11612 - 28006	2
Purchase Order	Number: 4199542 no value	Invalid Distribution	3
Purchase Order	Number: 4198435 no value	Invalid Distribution	3
Purchase Order	Number: 4198288 no value	Invalid Distribution	3
Invoices	Number: Z2500430	My Invoice Approvals	3
- Right Sidebar (Action Items):**
  - My Assigned Approvals: Requisitions To Approve (1), Purchase Orders (4), **Invoices (1)** (highlighted).
  - Unassigned Approvals: Requisitions (19), Purchase Orders (4), Change Request (2).
  - Invoices to Approve** (highlighted)
  - Procurement Requests to Approve
  - Change Requests to Approve
  - Search for a Vendor
  - Contract Requests to Approve
  - Contracts to Approve
  - Contracts that Require Attention: Expiring Contracts
  - Search Contracts
  - Contract Requests Recently Approved By Me

# Step by Step

**6b. Invoice Approval** - From the *Approvals* page you have the option to view the attachments of the invoice, get a quick view of the invoice, Approve and individual invoice directly from this page, or Approve All Matched Invoices. You can also select the invoice number to go to the Invoice page.



**Quick Actions:**

- **Attachments** – Allows you to quickly see attachments on the invoice
- **Quick View** – Brings up a new window with an overview of the invoice (seen below)
- **Approve/Complete** – Allows you to approve directly from this page

**Approve All Matched Invoices:**

- Will approve all invoices on this page that have a *Match Status* of *Matched*

**Filters:**

- Use the filters to filter the invoice by:
  - Vendor
  - Vendor Class
  - Department
  - Current Workflow Step
  - Matching Status
  - Matching Exceptions
  - Invoice Source
  - Invoice Type
  - Payment Status
  - Status Flags
  - Form Type
  - Invoiced By
  - Invoice Owner
  - Folders
  - State

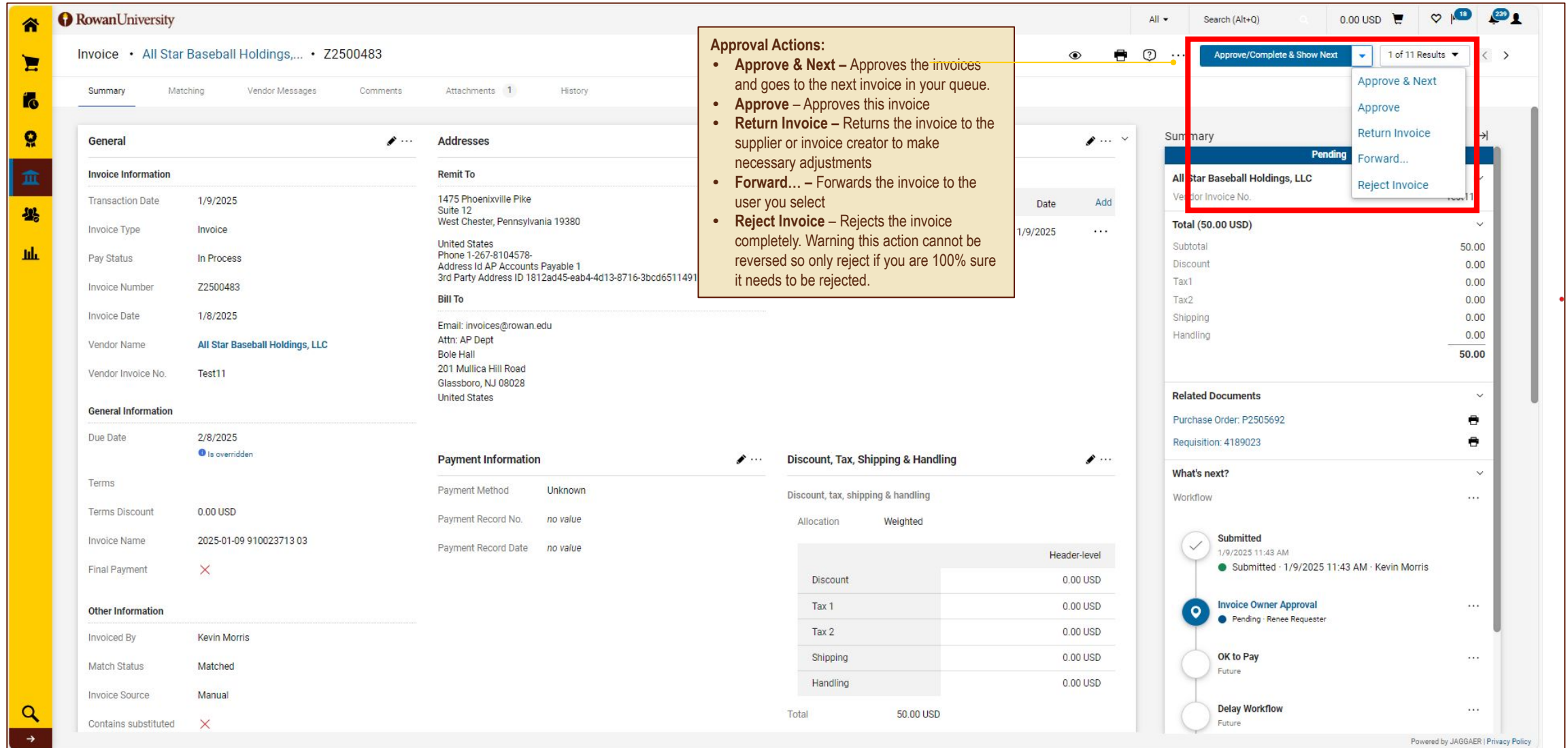
INVOICE NO.	VENDOR INVOICE NO.	VENDOR NAME	ASSIGNED APPROVER	CREATE DATE	PO NO.	MATCH STATUS	AMOUNT
Z2500483	Test11	All Star Baseball Holdings, LLC	Renee Requester	1/9/2025 11:39 AM	P2505692	Matched	50.00 USD

**Invoice Summary - Vendor Invoice No. Test11 (Doc. No. Z2500483)**

General	Addresses	Handling and Notes
<b>Invoice Information</b> Transaction Date: 1/9/2025 Invoice Type: Invoice Pay Status: In Process Invoice Number: Z2500483 Invoice Date: 1/8/2025 Vendor Name: All Star Baseball Holdings, LLC Vendor Invoice No.: Test11	<b>Remit To</b> Remit To Location: <a href="#">edit</a> List: 1475 Phoenixville Pike, Suite 12, West Chester, Pennsylvania 19380 United States Phone 1-267-8104578- Address Id AP Accounts Payable 1 3rd Party Address ID 1812a045-ea04-4d13-8716-3bc065114912	<b>External Attachments</b> Internal Attachments: <a href="#">12527348.pdf</a> External Note: no note Internal Note: no note
<b>General Information</b> Due Date: 2/8/2025 Terms: <a href="#">Is overridden</a> Terms Discount: 0.00 USD Invoice Name: 2025-01-09 910023713 03 Final Payment: <span style="color:red">x</span>	<b>Bill To</b> Email: invoices@rowan.edu Attn: AP Dept Bole Hall 201 Mullica Hill Road Glassboro, NJ 08028 United States	<b>Payment Information</b> Discount, Tax, Shipping & Handling

# Step by Step

**6c. Invoice Approval** - From the *Invoice* page review all details of the invoice to ensure the details are correct. Once you are ready navigate to the Approval actions button and select the correct action.



**Approval Actions:**

- **Approve & Next** – Approves the invoices and goes to the next invoice in your queue.
- **Approve** – Approves this invoice
- **Return Invoice** – Returns the invoice to the supplier or invoice creator to make necessary adjustments
- **Forward...** – Forwards the invoice to the user you select
- **Reject Invoice** – Rejects the invoice completely. Warning this action cannot be reversed so only reject if you are 100% sure it needs to be rejected.

	Header-level
Discount	0.00 USD
Tax 1	0.00 USD
Tax 2	0.00 USD
Shipping	0.00 USD
Handling	0.00 USD
<b>Total</b>	<b>50.00 USD</b>