SUITEONE

Cheat Sheet:
Approving Items

This cheat sheet can be used to walk through the process of approving items. This is a general guide which may not reflect all the possible options, buttons, menus, or customizations in place for your account.

Please contact your department head or your account administrators if you have any questions regarding system usage.

Receiving the Approval Notification	When an item is assigned to you for approval a notification email is automatically generated and will include summary information regarding that item. Also included is a link which takes you directly to the "Item Details" page, which displays the information entered by the originator.
Reviewing the Item	1. On the "Item Details" page locate the navigational tabs (Details, Fiscal, Comments, Attachments, etc.) 2. Click each tab and review the information entered or uploaded into the system 3. Modify the information as needed 4. If any changes were made click the "Save" button
Tracking Changes (as needed)	1. Click the "Edit/Versions" link under the field name of any major text field on an agenda (each time the content of a text field is changed and saved the version history updates) 2. Click the version number tabs along the left to see the historical changes 3. Look directly above the text field to see who made the changes and when
Adding an Approver (as needed)	1. From the Item Details page, click the "Approvals" tab 2. Click the "Add Approvals" button 3. Select the appropriate approver from one of the three drop-down menus 4. Click the "Save" button 5. The added approver will appear at the bottom of the approvals list
Editing the Approval Order (as needed)	1. From the Item Details page, click the "Approvals" tab 2. Click the "Edit Order" button 3. In the pop-up window drag and drop the names into the appropriate order 4. Close the window by clicking the red "X" button 5. The approvals list will refresh to show the updated order
Approving, Denying, or Returning the Item	1. From the Item Details page, click the "Approvals" tab 2. Click the "Approval Actions" button (this button is only visible if the item is assigned to you for approval) 3. In the pop-up window choose the appropriate action 4. Check the box if you would like to notify the item creator that changes have been made 5. Click the "Save" button to send your approval, denial, or return message