I sent the RFP for approval, but it's still in my Inbox. What is the RFP approval process?

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Which RFP's will appear in the RFP Inbox?

The inbox shows provides a quick view of, and access to, RFPs waiting to be processed. RFPs in the inbox have been:

- sent to you for processing
- saved by you, for later processing or for use as a template
- sent on by you
    - These RFP's are here so that you can retrieve an RFP when the addressee is unavailable.

What actions can I take for RFP's in my Inbox?

- Send back an RFP which has been sent to them by mistake
- Clone an RFP you have saved without sending on
- Delete a saved RFP

I created an RFP, and sent it to the approver, but it's still in my RFP Inbox. Why?

- After the RFP is sent for approval, it will appear in the Inbox of the RFP creator and the RFP approver.
- When either user opens (or re-opens) the RFP from their RFP Inbox, this will lock the RFP and remove it from all other users' RFP Inboxes.

The reason for this functionality is to enable users to reroute RFPs.

- For example, I've created an RFP, for myself or for another user, and sent it to Bob.
- I subsequently learn that Bob is out. I now want to send it to Joe, and I want to be able to do it myself.
- Since the RFP is still in my Inbox, as well as Bob's Inbox, I can reopen it, and send it to Joe.



IMPORTANT TO NOTE:

- If you are waiting for an RFP to be approved, do not open the RFP from your Inbox. This will lock the RFP and remove it from all other Inbox, including the approver's Inbox.
- If you have reopened the RFP, after having sent it for approval, re-send it to the approver. Then don't open it again from your Inbox.
- To view an RFP without locking it, use the Find RFPs link, from Atlas.

An RFP was sent to me for approval, but is not in my Inbox. Where did it go?

When an RFP is sent for approval, it will appear in the RFP Inboxes of the RFP creator and the approvers to which it was sent. If it is opened by any person, the RFP will be locked by that person, and will no longer appear in the Inboxes of the other people.

- To determine the Inbox or Inboxes in which an RFP resides, use the Find RFPs link in the Manage Reimbursements (RFPs) group in Atlas
- If your search returns a single RFP, the Inbox location will be at the very top of the RFP display.
- If your search returns multiple rows, the Inbox location will be included as part of the row of information for each RFP. Here's an example.

Do RFP's get routed for approval based on cost object, in the same way that requisitions are routed for approval?

No. RFPs do not follow the requisition workflow. Approvers are selected by the creators, not by a workflow.

The creator of an RFP selects the user to whom the RFP should be forwarded for review and / or approval. That person must have INVOICE APPROVE authorization on the noted cost object in order to approve the RFP.