REQUISITION APPROVAL

AUTHORIZED REQUESTERS AND AUTHORIZED APPROVERS

CHAPTER 4
Overview

In this chapter we will be looking at how to approve a Requisition. Most Authorized Requesters should also be Authorized Approvers. If you are not an Authorized Approver, workflow will notify the authorized approver that there is a requisition that requires approval.

Since you Budget Checked the requisition before submitting, all that remains before the requisition can be sourced to a purchase order (PO) is the approval. All requisitions must be approved by the Authorized Approver for the Requester. All requisitions for Grants must also be approved by the Grants Office.

When you click the Save and Submit button, the newly created requisition is routed through Workflow to the Authorized Approver.

Once a purchase requisition has been entered into the system the Authorized Approver can approve it at any time. The system will save the purchase requisition in an Open status until it has been approved.

Objectives

By the end of this chapter, you will be able to:

- Successfully Approve a Requisition
Reviewing the Worklist

As an Authorized Approver, the requisitions that require your approval will be in your Worklist.

The quickest way to view the items that require your approval is to click the Worklist hyperlink on the navigation header. The navigation header is present on all pages so you may click it at any time.

A summary view of the items requiring approval will be displayed.

Navigation

- Sign in
- Click Worklist

Basic information on the requisition is displayed. This includes:

- **From**: The ID of the Requester.
- **Date From**: The date the requisition was submitted.
- **Work Item**: The status of the item.
- **Worked by Activity**: The last person to work on the item.
- **Priority**: The priority to process the item.
- **Link**: A URL to review the Requisition if required. Click on the link to review and approved.
- **Mark Worked**: If available, you can change the status to show that it has been worked.
- **Reassign**: If available, click to reassign to another approver.
Requisition Approval

When you click on the Link for the item, the Requisition Approval page is displayed.

Navigation

- eProcurement
- Worklist
- Click Link for a worklist item

Open the Review/Edit Approvers section to display information on the approvers.

Review the information on the requisition and click the buttons to Approve or Deny. If you choose to deny, you should give your reason for denial in the Enter Approver Comments field.

When you click Approve, the verification page appears.
Click the **Return to Worklist** hyperlink to return to the worklist for additional approvals.

**Managing Approvals**

You can also work through your approvals using the *Manage Approvals* component.

**Navigation**

- eProcurement
- Manage Requisition Approvals

The page will open with the requisitions that you have been assigned to approve. The **Search Criteria** section is located at the upper portion of the page. You can use it to search for specific requisitions and review additional requisitions to those you have already approved. This criteria includes the following fields.

<table>
<thead>
<tr>
<th><strong>Requisition ID</strong></th>
<th>The ID assigned by the system to the requisition.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Requisition Name</strong></td>
<td>The name (description) given to the requisition by the requester.</td>
</tr>
</tbody>
</table>
Business Unit

This should be BSU.

Status

The default is Pending. Other options include: Approved, Denied, On Hold, Pushed Back.

Date From

The first requisition date to include in the search.

Date To

The last requisition date to include in the search.

Requestor

The ID of the approved requestor who submitted the requisition.

Entered By

The ID of the person who entered the requisition, if not the approved requestor.

Click **Search** to display the requisitions that match the specified criteria.

### Navigation

- eProcurement
- Manage Requisitions
- Enter criteria
- Click **Search**
Click the *Expand Section* icon to view summary information on the requisition.

**Navigation**
- eProcurement
- Manage Requisitions
- Click **Expand Section** icon for requisition

This displays summary information on the requisition. To review the actual requisition, click the hyperlink identifier of the requisition.

**Navigation**
- eProcurement
- Manage Requisitions
- Click **Expand Section** icon for requisition
- Click hyperlinked ID

Review the information and click the Review the information on the requisition and click the buttons to **Approve** or **Deny**. If you choose to deny, you should give your reason for denial in the **Enter Approver Comments** field.
When you click **Approve**, the verification page appears.

**Navigation**

- eProcurement
- Manage Requisitions
- Click **Expand Section** icon for requisition
- Click hyperlinked ID
- Click **Approve**

**Delegating Approvals**

eProcurement also offers a way to delegate approval authority to another authorized approver when you will be away from the office for several days. The delegation works in much the same way you would use an “Out of Office” assistant in your e-mail.

**Navigation**

- eProcurement
- My Profile

The Alternate User section is where you will record this information.

*Alternate User ID* The ID for the authorized approver to whom the approvals should be routed.
**Effective Date From:** The first date the approvals should be routed to the designated approver.

**Effective Date To:** The last date the approvals should be routed to the designated approver.

Click **Save** to record the information. The system will forward the approvals to the designated authorized approver during the dates specified.