EP.020.660 – APPROVING OR DENYING AN EPRO REQUISITION

Purpose	• To identify where an approver can access pending requisitions awaiting approval. • To describe how to preview detailed line information and the chartfields associated with each requisition line. • To identify how to deny a line from a multi-line requisition. • To approve a requisition.
Description	After a requisition is created, the system routes the transaction to an approver. The approver can view and take action in three different ways: clicking on the link in the Notifications bar, navigating directly to the Worklist or navigating directly to the Manage Requisition Approvals page. The approver can preview the path that the requisition approval will take, view who has already approved the requisition, and see any comments that previous approvers have entered. Once a requisition has completed the approval process, the requisition can be sourced to a purchase order.
Security Role	**BOR_EP_REQ_APPROVE**
Dependencies/ Constraints	None

Additional Information	An approver can either approve or deny a requisition. If denial action is needed for a line, it is recommended that the requisition be fully denied for all lines and notes added to specify why the denial action was taken.
	
	The approval process consists of Stages, Paths, and Steps.
	
	Currently, there are six approval stages that can be enabled for eProcurement requisitions. They include:
	
	• Stage 1: Department and Project Approval (required)
	• Stage 2: Fund Approval (optional)
	    o Path 1: Agency Fund Approval
	    o Path 2: Grant Fund Approval
	    o Path 3: Tech Fee Fund Approval
	• Stage 3: Amount Approval (optional)
	• Stage 4: Item Type Based Approvals (optional)
	    o Path 1: Asset Approval
	    o Path 2: Audio Visual Approval
	    o Path 3: Chemical Approval
	    o Path 4: Facilities Planning and Design Approval
	    o Path 5: IT Approval
	    o Path 6: University Relations Approval
	    o Path 7: Invalid NIGP Code
	    o Path 8: Furniture Approval
	    o Path 9: Human Resource Approval
	    o Path 10: Pharmaceutical Drug Approval
	    o Path 11: Budget Reference Approval
	• Stage 5: Federal Fund Approval (optional)
	• Stage 6: Buyer Approval (optional)
	
	See eProcurement User's Guide for Approvers for additional information.

Procedure

Below are step-by-step instructions on how to approve or deny a requisition from the Worklist:

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Worklist** link.
4.	Select one of the following: **My Worklist – Summary View** **My Worklist – Detail View** Once selected, either link will provide a list of requisitions awaiting approval. The Req ID can be found in the Link column.
5.	Select the link for the **Requisition ID** that needs approval. This will open the **Requisitions Approval** page for the selected requisition. From this page you can approve, deny, or push back a requisition during the workflow approval process. You can also add approvers and reviewers to the workflow routing. ***Note:*** *Available actions change depending on the authorizations for each user accessing the Requisition Approval page.* The Requisition ID, Requisition Name, Requester, Entered on date, Status, Budget Status and Total Amount is listed at the top of the page. Budget Status will reflect if the Pre-Check Budget action was performed prior to the requisition being submitted for approval. This section will display one of the following statuses: • **Not Checked** – PreCheck Budget action was not performed • **Provisionally Valid** – Budget available • **Error** – Budget unavailable *(click link to view budget exception)* The Requester’s Justification statement will display if it was entered on the requisition by the requester.

	Click the **Header Comments** link to view header comments/attachments. Click the **Edit Requisition** button to access the Maintain Requisitions page. You can make updates to the requisition before approving it. The **View printable version** link opens a new window to display a printable version of the requisition.
6.	The **Line Information** section displays information about the requisition lines, including comments added by the requester. • **View Line Details** - Click this button to view additional information for a requisition line, including Ship To and Distribution Line details. You must select a line or the Select All/Deselect All box prior to clicking the View Line Details button.
7.	Use the **Review/Edit Approvers** section to review aspects of the approval flow, such as who has approved the requisition or who the requisition will route to after your approval. All approval steps for the paths that are defined in the approval routing will display. Each stage is identified by a heading (Department and Proj. Approval, Buyer Approval, etc). The first stage must be approved before the requisition will route to the next stage. When a stage has been approved, the heading is updated to Approved, the stage that is currently pending approval is updated to Pending and all subsequent stages are updated to Awaiting Further Approvals status. Click the **Insert Approver (+)** button to enter another approver or reviewer for the requisition. Enter the ID for the user that you add as an approver or reviewer of this requisition. The system adds the requisition to the new approver's worklist, and the approver must approve the requisition before it can continue through the approval process. For additional information refer to business process EP.020.690 - Using Ad Hoc Requisition Routing. Click the **View/Hide Comments** link to display any comments left by previous approvers or the system. Approvers should not click the **Start New Path (+)** button as this functionality is not used.

8.	If necessary, you can use the **Enter Approver Comments** box to enter comments about the requisition. The system keeps the comments for others to review. After you enter comments, click the Deny button to deny the approval of the requisition.
9.	Once you are ready, you can Approve, Deny, or Push Back the requisition. • **Approve** - Click to approve the requisition and access the Requisition Approval confirmation page. Using the page you can view any additional approvals. The approval is immediate when you click the Approve button. • **Deny** - Click to deny the requisition. An email notification is sent to the original requester informing them that the requisition has been denied. You must enter a comment before clicking Deny. Comments can be viewed by the requester. • **Push Back** – Push Back takes a currently pending Step out of pending status and requeues the previous Step to its approvers. The meaning of push back is that the approver is questioning the prior Step's approval and is requesting clarification. Push back is only possible within a Path, therefore, the first Step of a Path cannot push back. Click to push back the requisition to the previous step within a path. You must enter a comment before clicking Push Back. Please refer to EP.020.670 - Push-Back an ePro Requisition for more information. *Note: The Push Back button does not display if the requisition is not eligible for push back.* After the requisition is approved or denied, the worklist entry is removed.
10.	Click the **Return to Worklist** link

Procedure

Below are step by step instructions on how to approve or deny a requisition from the Manage Requisition Approvals page.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** link.
3.	Click the **eProcurement** link.
4.	Click the **Manage Requisition Approvals** link.

5.	To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria in the **Search Requisitions** section. • **Requisition ID** - Select the specific system-assigned identifier of the requisition that you want to review or maintain. This limits the search results to one specific requisition. • **Business Unit** - Select a business unit containing the requisitions that you want to review for approval. • **Date From/To** - Select a range of dates to select requisitions to view. • **Requester** - Select the user who entered the requisitions. • **Requisition Name** - Select the name of a specific requisition that you want to view or maintain. This is the name the requester assigned to the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition. • **Status** - Select the status of the requisitions that you want to review for approval. Requisitions that appear in the search results are those in the status that you select and that meet the other search criteria that you enter. Status values are: o **Approved:** Displays all requisitions that you have approved. o **Denied:** Displays all requisitions that you have denied. o **On Hold:** Displays all requisitions that you have placed on hold. o **Pending:** Displays all requisitions that are waiting for your action. o **Pushed back:** Displays all requisitions you have pushed back to the previous approver. • **Requisition Name** - Select the name of a specific requisition that you want to view or maintain. This is the name the requester assigned to the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition. • **Date From/To** - Select a range of dates to select requisitions to view. • **Entered By** - Select an operator for whom you want to manage requisitions. Operators are people who have created requisitions for someone else. Only the requisitions submitted by this operator appear in the list.

Step	Action
	Note: *You can click on the* ***Advanced Search*** *link to include Item Description and Supplier ID as search options.*
6.	To locate requisitions that are currently pending your approval, select **Pending** from the Status dropdown menu.
7.	Click the **Search** button**.** Results display in the Requisitions section.
8.	Under the Action/Status dropdown menu, select one of the following for the individual requisition: • **Approve** – Select this option if you wish to approve the requisition. Click **Submit** to access the Submit Confirmation page. Here you can view line details and add required comments. Click **OK** to confirm approval. • **Deny** – Select this option if you wish to deny the requisition. Click **Submit** to access the Submit Confirmation page. Here you can view line details and add required comments. Click **OK** to confirm denial.
9.	To perform a mass approval or mass denial of several requisitions at one time, select the **Approve** or **Deny** button on the **Mark All** row. All displayed requisitions are marked with this action in the Action/Status field. Click the **Submit** button to access the Submit Confirmation page.
10.	Note that you can access the **Create New Requisition** and **Manage Requisitions** pages by clicking on the links at the bottom of the **Manage Requisition Approvals** page.