

PO.020.920 – APPROVING A PURCHASING REQUISITION

Purpose	<ul style="list-style-type: none"> To approve a Purchasing requisition (Type: ONL)
Description	<p>Requisitions created by a user with proper approval authorizations will automatically be approved when the requisition is successfully created and saved. However, this business process describes how to approve a requisition that is not automatically approved at the time it is saved.</p> <p>Requisition approvers must approve the amounts as well as the Chartfields for a requisition.</p> <p>When requisitions are created, the status is 'Open' or 'Pending Approval.' Requisitions must be in an Approved status to be processed fully.</p> <p>Approval action can be taken from multiple navigations in Purchasing: from the Worklist and the Requester's Workbench.</p>
Security Role	<p>BOR_PO_REQ_APPROVE; SUPERVISOR (RC)</p> <p>BOR_PO_APPROVE</p> <p>BOR_PO_BUYER_APPR</p> <p>BOR_PO_BUD_REF_APPROVAL (Budget Reference)</p> <p>BOR_PO_ASSET_APPR (Asset)</p> <p>BOR_PO_MAINTAIN (needed if approving from Add/Update POs page)</p>
Dependencies/ Constraints	<p>The Purchase Order must have a status of "Pending Approval" for it be made available for approval.</p>
Additional Information	<ul style="list-style-type: none"> Every purchase order will route to the Buyer approval level. The Asset and Budget Reference approval levels are triggered when certain information is added to the purchase order and needs further review. For more information, see the Purchasing Workflow Approval job aid.

	<ul style="list-style-type: none"> • Approvals for requisitions from a CAT supplier should be approved through eProcurement’s Manage Requisitions Approvals page. For more information, see EP.020.540 – Managing Requisitions.
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Procedure

Below are step by step instructions on how to take approval action on a requisition from the Worklist.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Worklist link.
4.	Click the My Worklist – Summary View or My Worklist – Detail View link. Once selected, either link will provide a list of requisitions awaiting approval. The Req ID can be found in the Link column.
5.	<p>Select the link for the Requisition ID that needs approval.</p> <p>This will open the Requisitions Approval page for the selected requisition.</p> <p>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.</p> <p>Note: Available actions change depending on the authorizations for each user accessing the Requisition Approval page.</p> <p>The Requisition ID, Requisition Name, Requester, Entered on date, Status, Budget Status and Total Amount is listed at the top of the page.</p> <p>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:</p> <ul style="list-style-type: none"> • Not Checked – PreCheck Budget action was not performed • Provisionally Valid – Budget available • Error – Budget unavailable (<i>click link to view budget exception</i>)

	<p>The Requester's Justification statement will display if it was entered on the requisition by the requester.</p> <p>Click the Header Comments link to view header comments/attachments.</p> <p>Click the Edit Requisition button to access the Maintain Requisitions page. You can make updates to the requisition before approving it.</p> <p>The View printable version link opens a new window to display a printable version of the requisition.</p>
6.	<p>The Line Information section displays information about the requisition lines, including comments added by the requester.</p> <ul style="list-style-type: none"> • 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.	<p>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 be displayed. 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.</p> <p>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 for 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.</p> <p>Click the View/Hide Comments link to display any comments left by previous approvers or the system.</p> <p>Approvers should not click the Start New Path (+) button as this functionality is not used.</p>

8.	<p>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.</p> <p>After you enter comments, click the Deny button to deny the approval of the requisition.</p>
9.	<p>Once you are ready, you can Approve, Deny, or Push Back the requisition.</p> <ul style="list-style-type: none"> • 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 worklist entry 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. <p><i>Note: The Push Back button does not display if the requisition is not eligible for push back.</i></p> <p>After the requisition is approved or denied, the worklist entry is removed.</p>
10.	<p>Verify the requisition status changed to the option selected from the previous step.</p>

Below are step by step instructions on how to approve Purchasing requisitions amounts only.

Step	Action
1.	Click the NavBar icon
2.	Click the Menu icon
3.	Click the Purchasing link.
4.	Click the Requisitions link.
5.	Click the Manage Requisition Approvals link.
6.	A list of requisition IDs for the user to select from would appear if there are multiple requisitions in a " Pending " status.
7.	Select the appropriate action to take on the requisition. <ul style="list-style-type: none"> • Approve – Select this option to approve the requisition. • Deny – Select this option to deny the requisition.
8.	Click the Save button.