Requisition Approvals

1. Open the requisition.
   a. Log into the PeopleSoft EFS system and click <Worklist> on the universal toolbar.
   b. Click the hyperlink for the requisition to be reviewed.

2. Review the requisition header information.
   a. Does the requester’s justification comply with the University’s 5 Ws policy (who, what, where, when, why)?

3. Review the requisition lines.
   a. Review the vendor information for each line. Is the appropriate vendor used for each line?
   b. Requisitions for standard goods and services may have a different vendor for each requisition line.
   c. Requisitions for Web tab vendors (U-Stores, Dell), blanket orders, and contracts for professional services must have the same vendor listed for all line items.
   d. If the vendor is missing and the total value of the requisition is $50,000 or more, deny the requisition with comments noting that the requisition will be reviewed and approved after bidding is complete.
   e. If the vendor is missing and the requisition total is less than $50,000, deny the requisition with comments asking the preparer to add the vendor.
   f. Review the line details for each line on the requisition.
   g. Click <Select All/Deselect All> to select all requisition lines for review. A check mark displays in the checkbox to the left of each requisition line.
   h. Click <View Line Details>. A new window opens showing the requisition line details.
Requisition Approvals (cont.)

4. Review the item details and answer the questions:
   a. Is the purchase allowable per University policy?
   b. Are all required ChartFields populated with appropriate values?
   c. Is the ship-to location accurate?
   d. If sponsored funds are used, does the purchase comply with all sponsor guidelines?

If the answer to any of the above questions is no, deny the requisitions with comments to the preparer detailing the issues to be corrected.

Click the <X> in the top right corner of the popup window to close it.

5. Review the requisition line comments and attachments.
   a. Click the line comments icon (the thought bubble) in the Requester's Comments column for the first requisition line.
   b. Review the line information.
   c. Review the line comments.
   d. Review the line attachments. To open an attachment, click <View>. See the Approval Matrix job aid for a list of required attachments by type.
   e. Click <Return to Previous Page> at the bottom of the screen.
   f. Repeat the steps to review requisition line comments and attachments for each additional line on the requisition.

6. Review the requisition approval chain and/or forward a requisition for SPA approval.
   a. To optionally view the approval chain for each requisition line, click the arrow icon located to the left of Review/Edit Approvers. See the Approval Matrix job aid for more information about the required approvers at each level.
   b. View the approval chain for the requisition.
Requisition Approvals (cont.)

c. If you are a Certified Approver and wish to forward the requisition to SPA for an additional review or approval, do the following:

   i. Click the add icon (the plus sign). The window to insert an additional reviewer or approver displays.

   ii. Click the lookup icon (magnifying glass) to the right of the User ID field.

   iii. Select the user ID of the additional SPA reviewer or approver.

   iv. To add the person as an additional reviewer without approval authority, select the Reviewer radio button.

   v. To add the person as an additional approver for the requisition line, select the Approver radio button.

   vi. Click <Insert>.

   vii. Click <Apply Approval Changes> at the bottom of the Review/Edit Approvers section of the screen. The new SPA reviewer or approver is added to the approval chain for the requisition line.

7. Approve or deny the requisition line.

   a. If the requisition line is complete, allowable, and justifiable based on your review, click <Approve>. The requisition is approved. When all approvals in the chain are complete, the PO will be created and dispatched to the vendor automatically.
Requisition Approvals (cont.)

b. If the requisition line is not approvable and must be changed or canceled, do the following:

i. In the Enter Approver Comments field, type comments to the preparer detailing the changes required by requisition line or requesting cancellation of the requisition.

ii. Click <Deny>. The requisition is routed back to the preparer for changes or cancellation. Once a preparer has updated and resubmitted a denied requisition, it will begin the approval process again.

ALTERNATE APPROVERS

Requisitions are automatically routed to the alternate approver’s worklist if no action is taken within five days. If you know you will be out of the office, you may enter the dates on the My System Profile page, and your alternate approver will receive immediate approval notifications in your absence.

To route requisitions to your alternate approver in your absence, do the following:

1. At the bottom of the user menu, click <My System Profile>.

2. Click the lookup icon (magnifying glass) to the right of the Alternate User ID field.

3. Select the designated alternate approver for the cluster/module.

4. Type the first date forwarding should begin in the From Date field.

5. Type the date forwarding should end in the To Date field.

6. Click <Save>.

For emergency approvals, contact the Financial Helpline.