PO.020.920 – APPROVING A PURCHASING REQUISTION

Purpose	• To approve a Purchasing requisition (Type: ONL)
Description	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. Requisition approvers must approve the amounts as well as the Chartfields for a requisition. When requisitions are created, the status is 'Open' or 'Pending Approval.' Requisitions must be in an Approved status to be processed fully. Approval action can be taken from multiple navigations in Purchasing: from the Worklist and the Requester's Workbench.
Security Role	**BOR_PO_REQ_APPROVE; SUPERVISOR (RC)** **BOR_PO_APPROVE** **BOR_PO_BUYER_APPR** **BOR_PO_BUD_REF_APPROVAL** (Budget Reference) **BOR_PO_ASSET_APPR** (Asset) **BOR_PO_MAINTAIN** (needed if approving from Add/Update POs page)
Dependencies/ Constraints	The Purchase Order must have a status of "**Pending Approval**" for it be made available for approval.
Additional Information	• 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.

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	• 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.

Procedure

Below are step by step instructions on how 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** link.
5.	Under the **Link** column, select a requisition from the results list to review for approval. The system navigates to the Requisition Approval page.

Note: *If the system navigates to the View Approvals page, then this requisition is either not available for the user's approval or it has already been approved.* |
| 6. | To review requisition comments and attachments, click the **View Comments and Attachments** link. |
| 7. | Select each requisition line to mark for approval action.

Note: *If users want to take the same action all requisition lines, click the Select All checkbox to mark all lines.* |
| 8. | After requisition is reviewed, select one of the following options:

• **Approve**: moves the requisition to the next level in the approval workflow.

• **Deny**: users should not deny individual requisition lines. Requisitions in their entirety should be marked as Denied. This action can only be taken for the Buyer level of approval. Not available for Asset or Budget Reference approvals. |
| 9. | Verify the requisition status changed to the option selected from the previous step. |

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 **Approve Amounts Req** link.
6.	Note that a specific requisition was automatically retrieved. This is because there are no others currently pending approval. A list of requisition IDs for the user to select from would appear if there are multiple requisitions in a "**Pending Approval**" status. **Remember:** Amount approval is required anytime when changes to quantity or price resulting in change to the extended (total) cost of a line.
7.	Select the appropriate action to take on the selected requisition. The "Approve" Approval Action will default. Other selections available in the drop-down are Deny and Recycle. However, since the traditional requisitions being processed here are only meant to be a virtual approval process, the other selections are void as actual routing is not executed.
8.	Click the **Save** button.
9.	Notice that the Approval Status has changed from "**Initial**" to "**Complete**".

Below are step by step instructions on how to approve Purchasing requisitions ChartFields 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 **Approve ChartFields** link.

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Step	Action
6.	Since the Amount Approval is Complete, you are ready to Approve the Chartfields for this requisition. **Remember:** Chartfield Approval is required when changes are made to the chartfield string after approval was completed.
7.	Click the **Save** button.