eProcurement Requisition Approvals at The University of Louisville

Updated 11/19/2013

Approving Requisitions

The University of Louisville approval rules require that all requisitions will route first for department/exception approval and then for buyer approval. In this section, we will discuss the approval process and how a department/exception approver will use the process to manage the transaction.

To access requisitions awaiting your approval, select the 'Worklist' hyperlink at the top of the page.

The worklist page is User ID specific and shows all workflow items requiring attention. In the 4th column on the page, you will have items specifying 'Approval Workflow'. Select the hyperlink associated with one of these entries to access details and approve or deny the request.

If you have received one of these Approval Workflow items in your Worklist, you are defined either as a Department Approver or an Exception Approver.

Regardless of which of these 2 routes applies to you, the steps covered in this document for requisition approval apply.
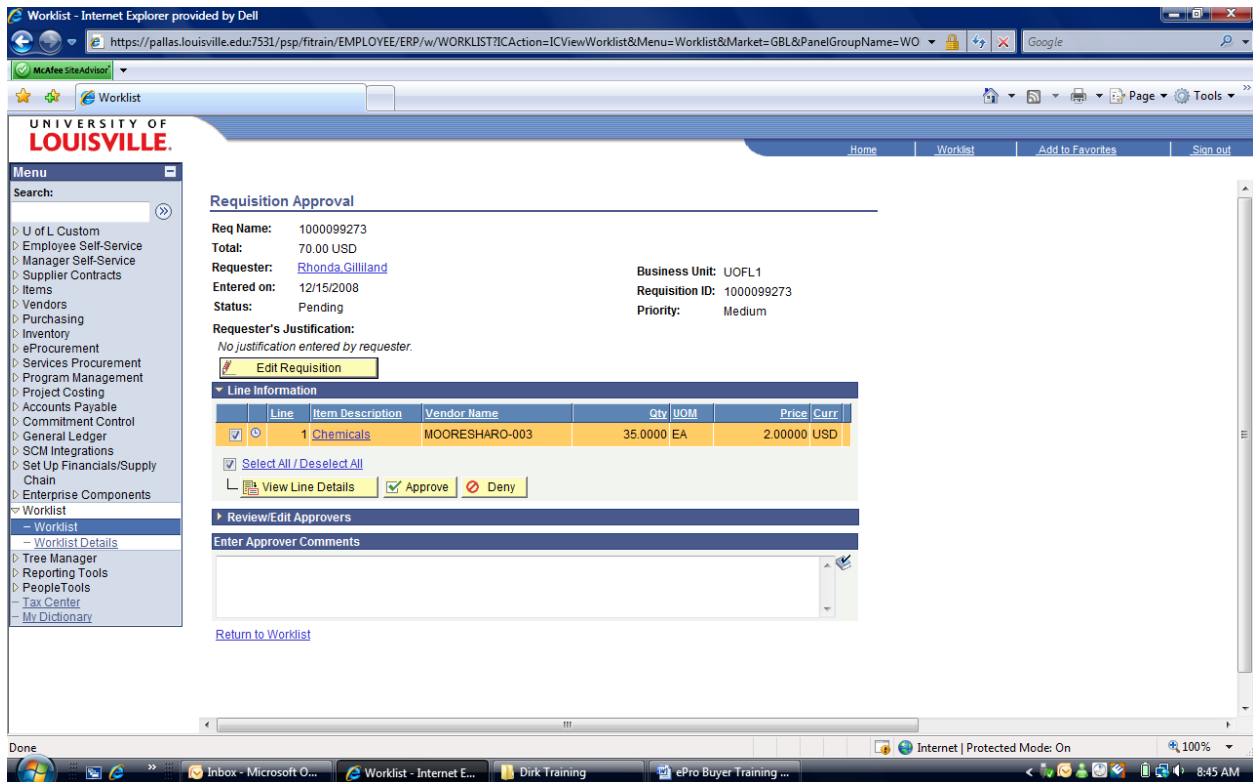
From the Requisition approval page, an approver can:

- **View requestor information**
- **Review requisition details**
- **View Justification Comments entered by the requestor**
- **Review the existing approval chain**
- **Add Approver Comments**
- **Approve the Requisition**
- **Deny the Requisition**

To review the existing approval chain, click on the arrow in front of Review/Edit Approvers Bar.
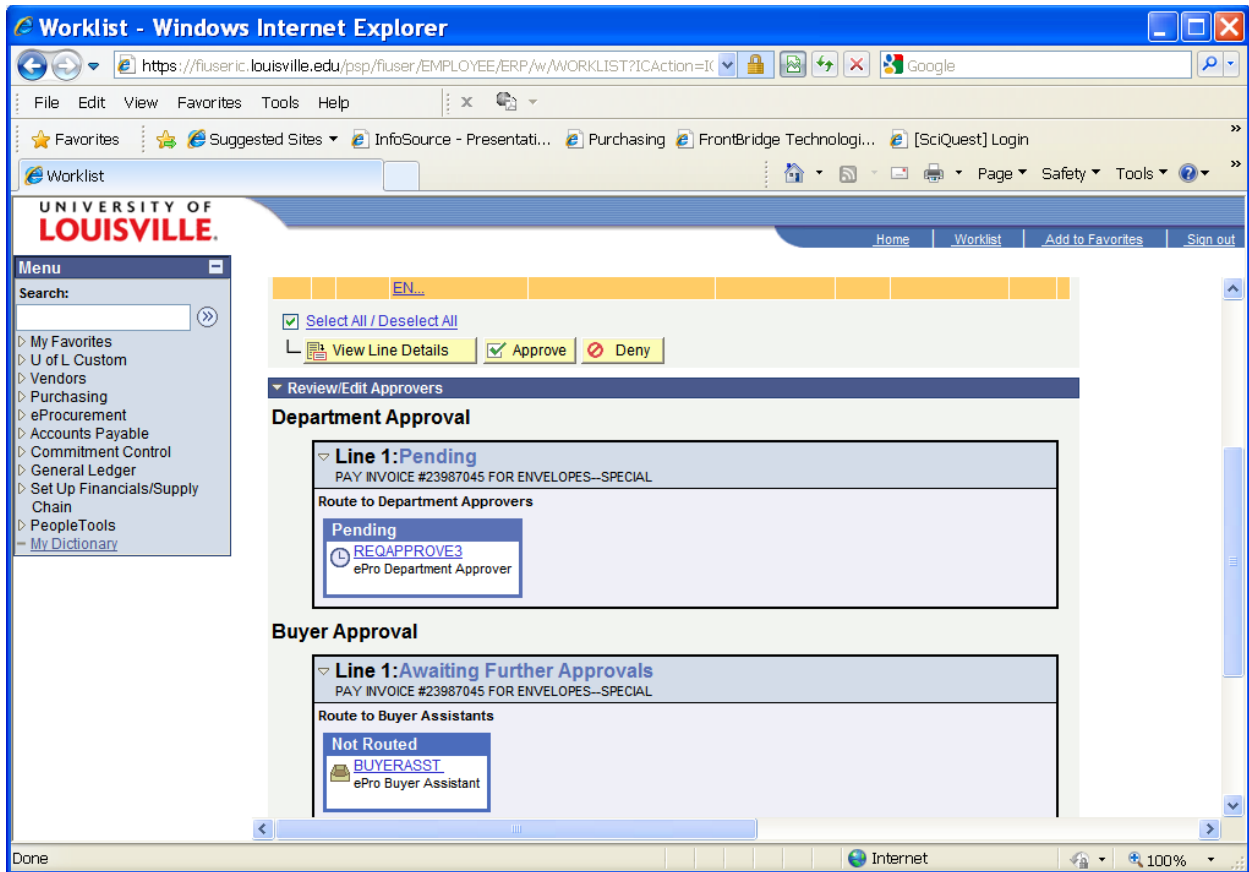
Here you can see the chain of approvals required to process this requisition.

Click on any approver link to see name and email.

Click on Close [Close]

Click on the worklist link at the top right side of the screen

Click on the next requisition to approve

For the Purposes of this exercise, select the 'View Line Details' button. A popup window similar to the one below will appear providing schedule and distribution information for review.

Requisition: 1000099273

Requester: Rhonda,Gilliland **Business Unit:** UOFL1 **Requisition ID:** 1000099273 **Date:** 12/15/2008

Comments:

Line	Description	Qty	Price	Curr	UOM	Total
1	Chemicals	35.0000	2.00000	USD	EA	70.00

Sched Line	Ship To	Attention	Due Date	Qty	Total
1	Central Receiving Dock	Rhonda,Gilliland		35.0000	70.00

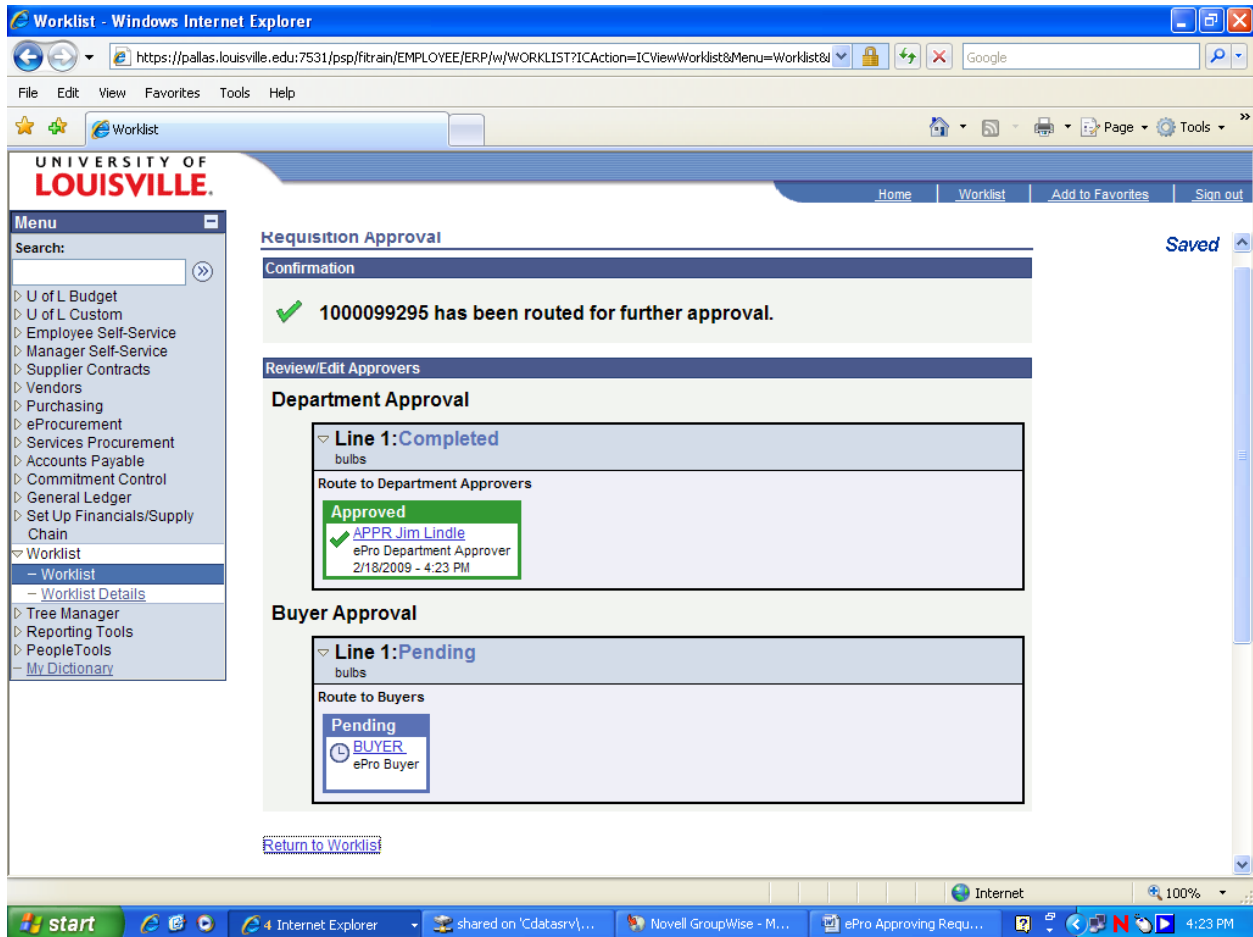| Line	Pct	Req Qty	Amount	GL Unit	Location	Account	Fund	Dept	Program
1	100	35	70	UOFL1	CENT_OUTSD	541110	1000	2314000156	01044

Close this window by selecting the Red 'X' in the top right hand corner.
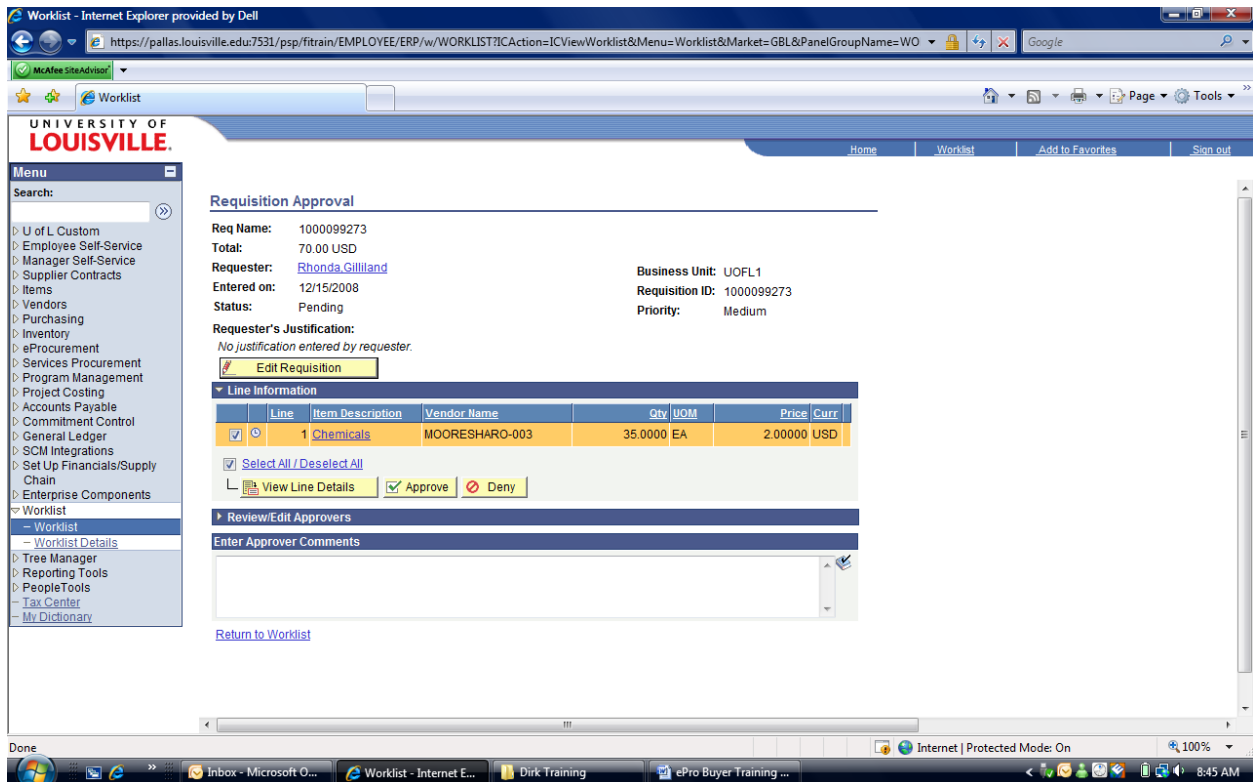
For the purposes of this exercise, we are going to assume that we are satisfied with the Requisition.

Select the 'Approve' button to approve the line(s).

This requisition is now approved by you and routed to the buyer for approval. Click on the 'Worklist' icon at the top of the page to access the Worklist and select another requisition.

In this exercise, we are going to Deny this requisition. In the Approver Comments box, type the following:

"Denied due to Restriction, please cancel requisition."

Select the 'Deny' button.
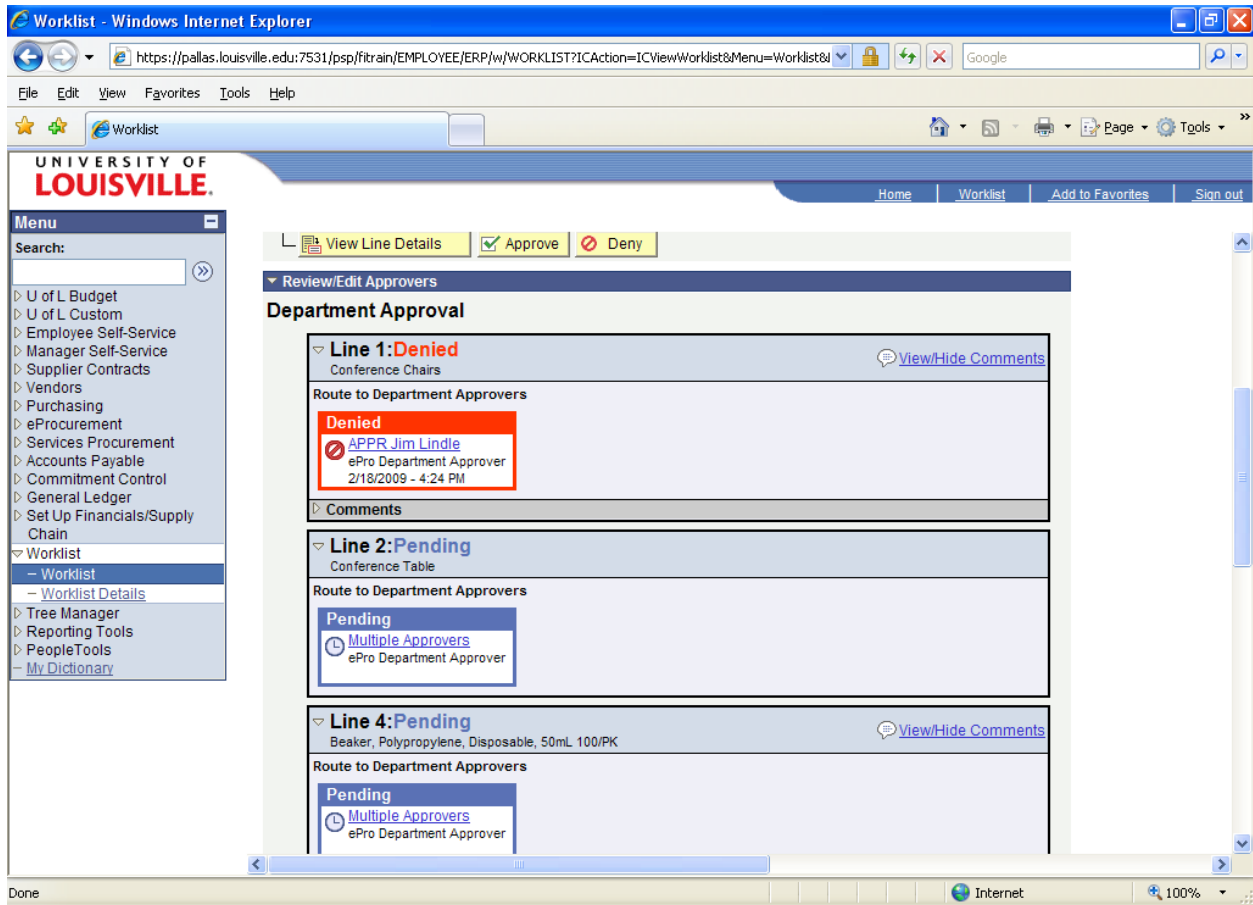
The denial is captured in the approval chain and notification sent to the requestor. Click on the 'Worklist' icon at the top of the page to access the Worklist and select another approval item.
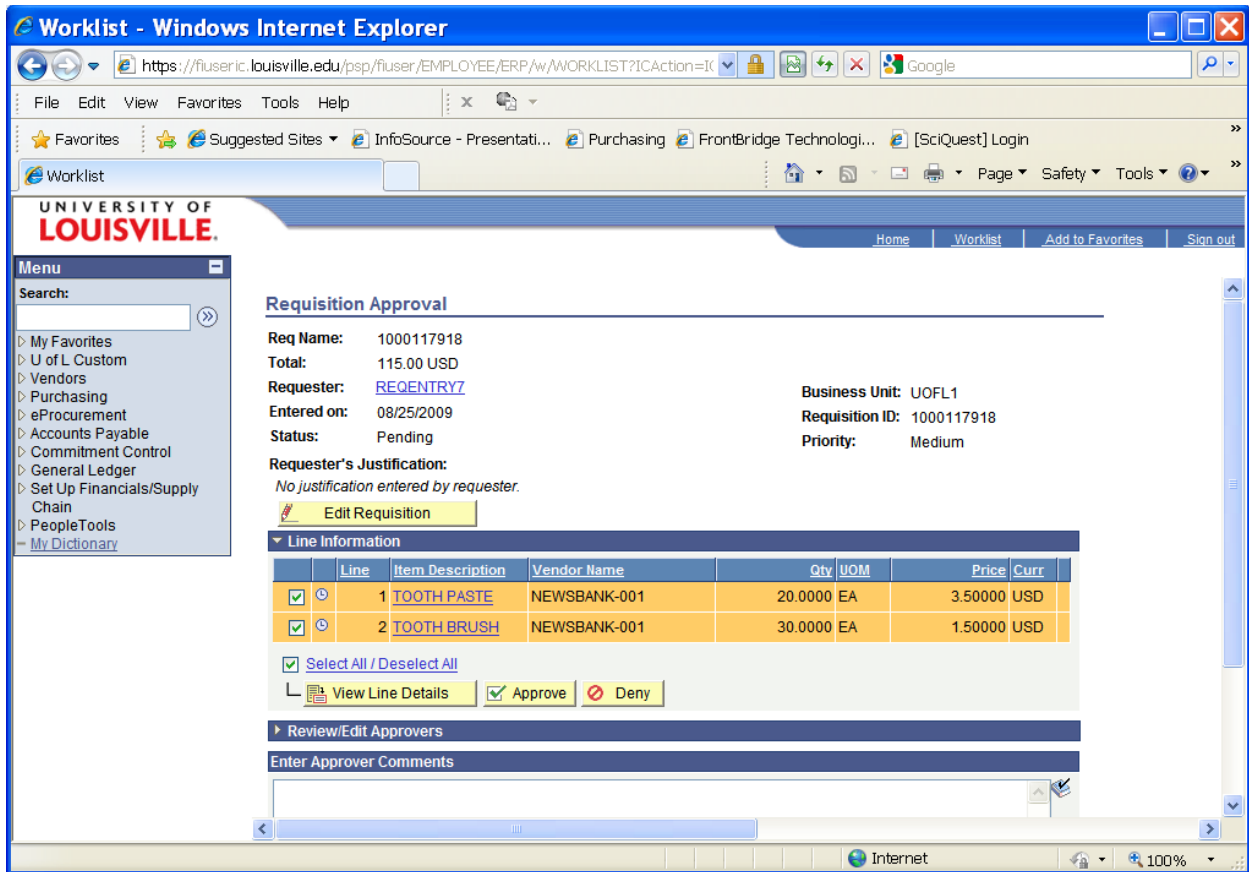
In this example the requisition has multiple lines. Note as the default, all lines are selected. As an approver, you can approve a single line at a time, or all lines simultaneously. Uncheck the boxes of the lines you do not want to approve.

(You also have the ability to approve some lines on a requisition and deny others).

Congratulations!! You have now learned how to Review, Approve, and Deny an eProcurement requisition requiring your approval.