[Approving Requisitions]

This instruction guide is designed to describe how to approve purchasing requisitions in PeopleSoft.

- Log into the system via the myUFL portal, using your GatorLink user id and password (http://my.ufl.edu).
  - Click your worklist hyperlink in the upper right-hand corner of your screen. This worklist will include purchasing transactions as well as other transactions associated with your security.

- Use your Worklist Filters dropdown menu to limit items for view.
  - Select "ePro Req Approval Worklist" as your filter.
  - Review list provided, then select requisition by clicking its hyperlink.

- The requisition will now appear. **Ensure that everything is accurate before approving the requisition. You are responsible for validating the accuracy of the ChartField combinations.**
  - Click "View Request Details.
  - Click the item description hyperlink to view the vendor selected.
  - When finished, click "Return to Previous Page.

- From this main screen, add an approver or reviewer if needed.
  - To require another person’s approval, select "Approver," then add the employee by using the lookup function. By adding a person as an approver, his or her approval will be required in order for the requisition to move forward in the Procure-to-Pay Life Cycle.
  - To send the requisition for review only—but not approval—click "Reviewer," then select the employee using the lookup feature. A person designated as a reviewer does not affect the approval process.

- Use the "plus" button to add additional approvers or reviewers.

- To see the approval path of your requisition, click the triangle next to "View Approval Comments/History.” Here you will view who has or will view the requisition and whether they’ve approved it. Click the triangle again to return the main screen to its original form.

- Once review of all pertinent information has been completed, click the appropriate button: Approve, Deny, or Hold.
  - "Approve" sends the requisition to the next level of approval—which typically would be Purchasing and Disbursement Services.
  - "Deny" cancels the request. Once a request is canceled, it cannot be recovered. It will have to be re-created from the beginning.
  - "Hold" will return the request to the requestor’s Worklist. Use “Hold” if you are requesting changes to the requisition before approval. Use the comment field to indicate why you’ve placed the requisition on hold.

**Note:**
- The initiator will receive an email message if the requisition is approved, denied, or placed on hold.
- After approval, the Approver Action will change from "pending" to "approved.” The requisition status may still be “Pending Approval” if there are more approvers ahead in the process.
- If you are a departmental approver, you’ll also see whether the budget check is valid. The budget is checked three times in the life cycle: when the request is approved, before the purchase order is dispatched by purchasing and disbursement services, and before payment. Learn more about budget “exceptions” in the hands-on “Introduction to Budget and Commitment Control” training.

Created in conjunction with Training and Development and Purchasing & Disbursement Services.