



# ADDY TIPS



## Approval Process for Requisitions Needing Legal Review

If you are creating a requisition that may need legal approval, you will find this Addy Tip helpful. This Addy Tip is divided into two parts: Requesters (page 2) and Approvers (page 4).

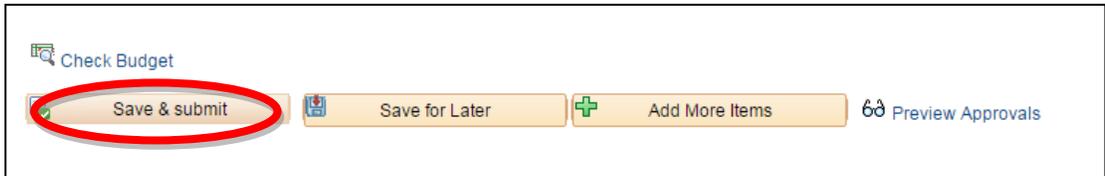
When possible, attempt to meet any legal requirements prior to creating your requisition. If the Office of the General Counsel (Legal) at UCF has already approved your transaction, you can attach the signed document that pertains to the transaction to your requisition and do not need to take any additional action.

Sometimes you may need to prepare a requisition for a transaction before you receive Legal's approval. In that case, you should add Legal as an additional approver to your requisition before you submit it to workflow.

**Contracts and Agreements.** Requisitions pertaining to a contract or agreement (even if vendor initiated) always need review and approval by Legal. Be sure to attach the contract or agreement to your requisition so that Legal can review it too.

If you need to scan a contract or agreement for Legal to review, be sure to save the scanned document in either a JPEG or PDF file format before attaching it to your requisition. Because these formats have a smaller file size, they display faster than other formats, such as BMP, thereby reducing the amount of time needed to process your requisition.

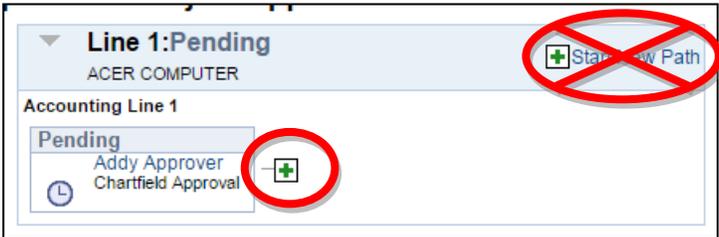
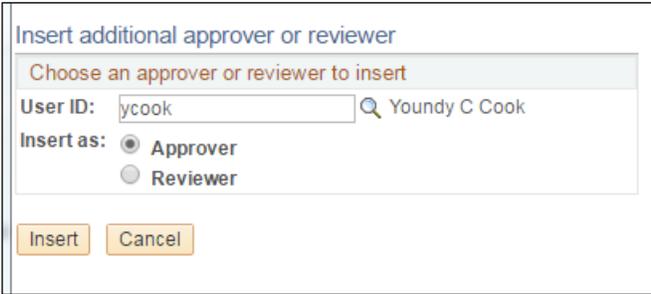
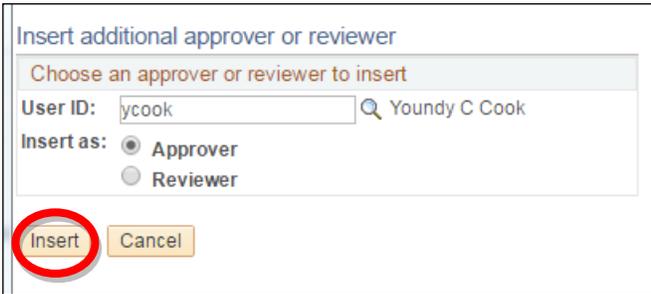
### Requester: Adding a Legal Approver

Steps	Action
1.	<p>Click the <b>Save and Submit</b> button after completing the <b>Checkout – Review and Submit</b> page.</p> 



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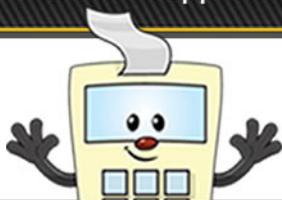
<p>2.</p>	<p>On the <b>Requisition Approval</b> page that displays, click the <b>plus symbol (+)</b> beside the approver's name shown by the system.</p>  <p><b>Note:</b> Do <b>not</b> click the <a href="#">Start New Path</a> link</p>
<p>3.</p>	<p>Enter User ID <b>ycook</b>, which will identify the designated workflow approver for Legal.</p> 
<p>4.</p>	<p>Click <b>Insert</b> to add the <b>User ID</b> as an approver.</p> 



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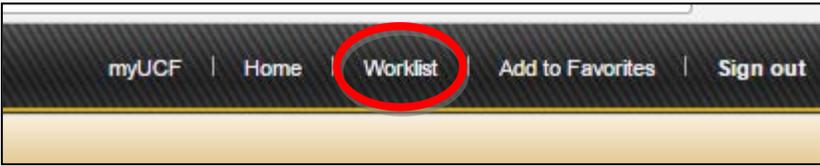
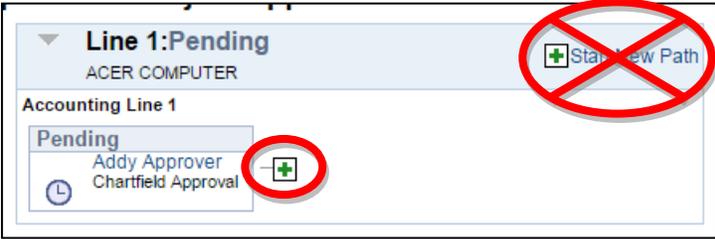
<p>5.</p>	<p>The newly added approver is now part of the workflow.</p> <div data-bbox="354 527 1192 814" style="border: 1px solid black; padding: 10px;"> <p><b>Department/Project Approval</b></p> <p>Line 1: Pending <span style="float: right;">+ Start New Path</span></p> <p>ACER COMPUTER</p> <p>Accounting Line 1</p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid gray; padding: 5px; margin-right: 10px;"> <p>Pending</p> <p>Addy Approver Chartfield Approval</p> </div> <div style="margin-right: 10px;">→ +</div> <div style="border: 1px solid gray; padding: 5px; border-radius: 15px;"> <p style="color: blue;">Not Routed</p> <p>Youndy C Cook Inserted Approver</p> </div> <div style="margin-left: 10px;">+ →</div> </div> </div>
<p>6.</p>	<p>The system will then route the requisition and any attached documents to Legal for review. Legal will coordinate having the appropriate attorney review the transaction and any documents attached to the requisition.</p>
<p>7.</p>	<p>After receiving a response from the attorney reviewing the transaction, Legal's designated approver will either approve or deny the requisition.</p>
<p>8.</p>	<p>Legal will add any required additional documents to the approved requisition before submitting it to the workflow process.</p>
<p>9.</p>	<p>If Legal determines additional approvers need to be added, Legal's designated approver will add them to the requisition.</p>
<p>10.</p>	<p>If the requisition is over \$75,000, the current Chartfield workflow rules will route the requisition to the appropriate vice president/DDC for approval.</p>
<p>11.</p>	<p>A requisition will not be sourced to a purchase order until it obtains all the required approvals.</p>

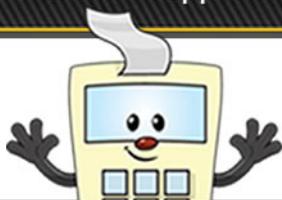


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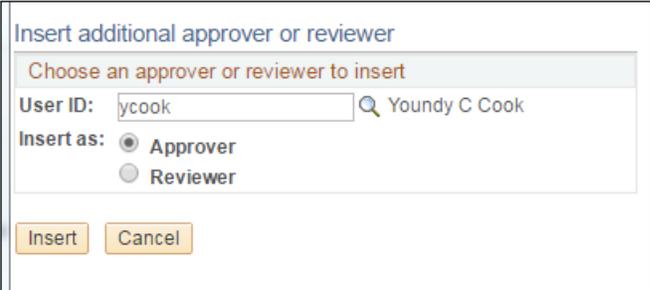
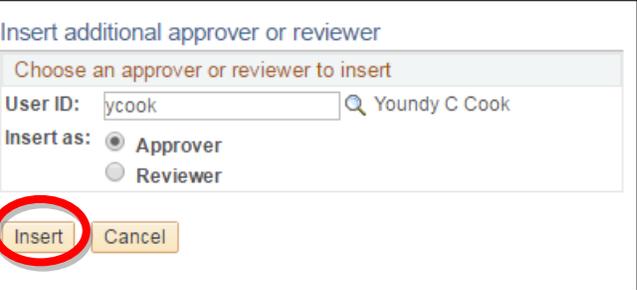
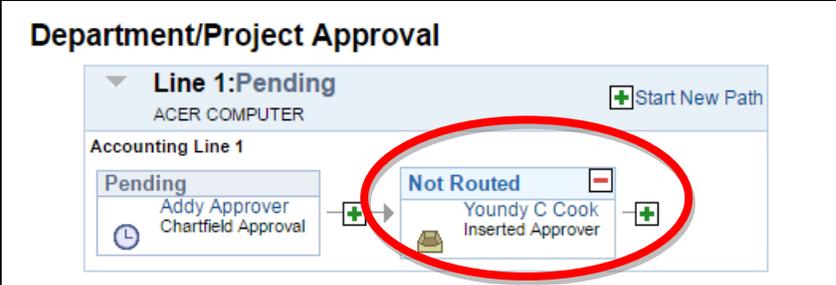
## Approver: Adding a Legal Approver

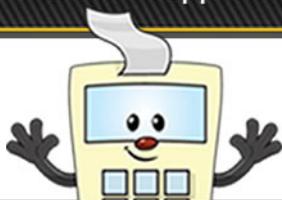
Steps	Action
1.	Navigate to your <b>Worklist</b> in UCF Financials.  
2.	Click the requisition <b>link</b> of the requisition needing Legal approval.  
3.	On the <b>Requisition Approval</b> page that displays, click the <b>plus symbol (+)</b> beside the approver's name shown by the system.    <b>Note:</b> Do <b>not</b> click the <a href="#">Start New Path</a> link



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<p>4.</p>	<p>Enter User ID <b>ycook</b>, which will identify the designated workflow approver for Legal.</p> 
<p>5.</p>	<p>Click <b>Insert</b> to add the <b>User ID</b> as an approver.</p> 
<p>6.</p>	<p>The newly added approver is now part of the workflow.</p> 
<p>7.</p>	<p>The system will then route the requisition and any attached documents to Legal for review. Legal will coordinate having the appropriate attorney review the transaction and any documents attached to the requisition.</p>



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8.	After receiving a response from the attorney reviewing the transaction, Legal's designated approver will either approve or deny the requisition.
9.	Legal will add any required additional documents to the approved requisition before submitting it to the workflow process.
10.	If Legal determines additional approvers need to be added, Legal's designated approver will add them to the requisition.
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