Approving Requisitions in UCF Financials

If you are a requisition approving official, an "authorized signatory," or are listed on the Department Authorization List (DAL) as a Purchase Requisition Approver (PRA), you will find this Addy Note useful. You will learn the following:

- How your security role in UCF Financials affects the views and actions available to you
- How to designate an alternate approver
- How to select a notification method
- The steps to follow after a requisition has been submitted to you for review and approval
- What items must be included in a requisition to purchase an asset.

Understanding Security Roles and Available Views and Actions

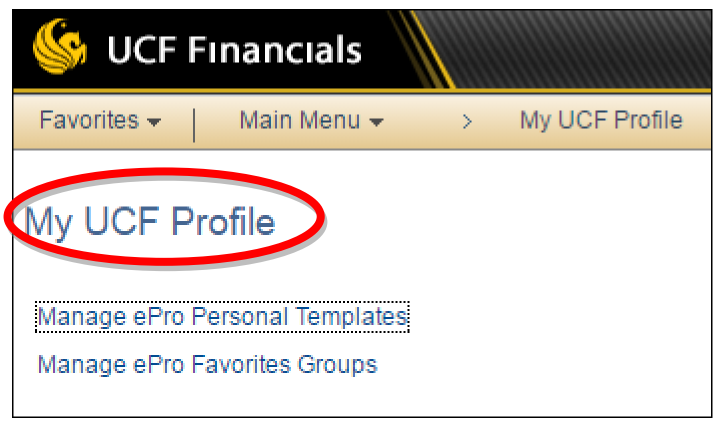
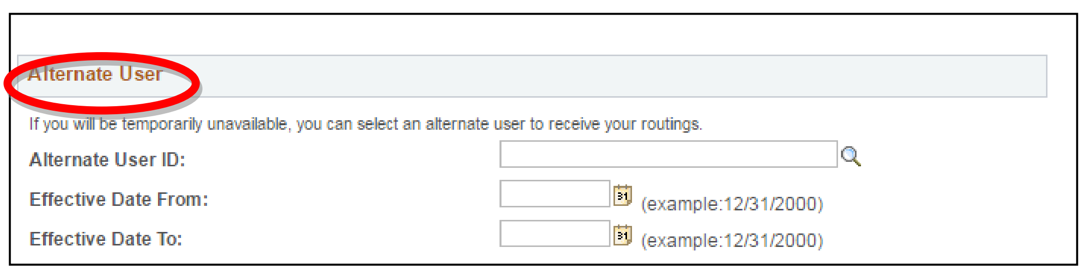
Depending on your role, you may have dual security for creating as well as approving ePro requisitions. While UCF business practice prefers that you choose to be either an approver or a requester, you can assume both roles, with some limitations. The table below shows the relationship between your security role and the actions you can perform.

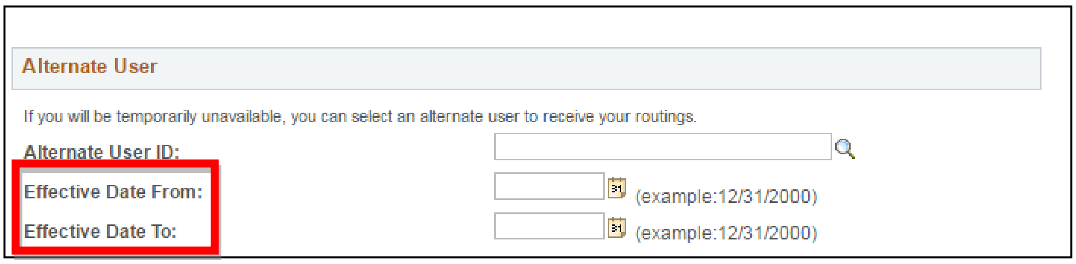
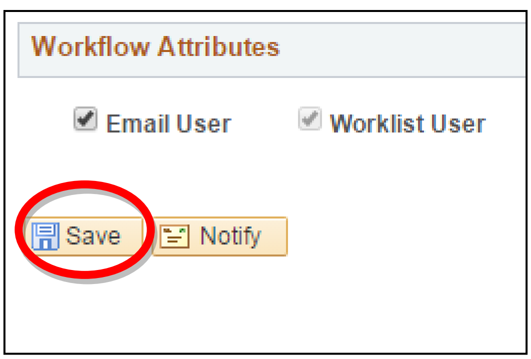
Available Views and Actions	If I am a Requester (PRC) only, I can	If I am an Approver (PRA) only, I can	If I am both a Requester and an Approver (PRC and PRA), I can
View:	my own requisitions PLUS other requesters' requisitions authorized through PRC Details*	all requisitions	my own requisitions PLUS other requesters' requisitions authorized through PRC Details
Modify:	my own requisitions PLUS other requesters' requisitions authorized through PRC Details	all requisitions	my own requisitions PLUS other requesters' requisitions authorized through PRC Details
Approve:	no requisitions	requisitions routed to me by workflow rules	requisitions routed to me by workflow rules
Receive:	my own requisitions PLUS other requesters' requisitions authorized through PRC Details	requisitions with my Ship To location PLUS other requesters' requisitions authorized through PRC Details	my own requisitions PLUS other requesters' requisitions authorized through PRC Details

* PRC Details is part of the Employee Information data that a Dean, Department or Chair (DDC), Responsible Financial Officer (RFO), or DAL Processor (DLP) can update for all employees under their jurisdiction. Using this tab, the DDC, RFO, or DLP can allow requesters to view other requesters' requisitions. See the Addy Note "Completing the PRC Details Tab" for more information.

Designating an Alternate Approver

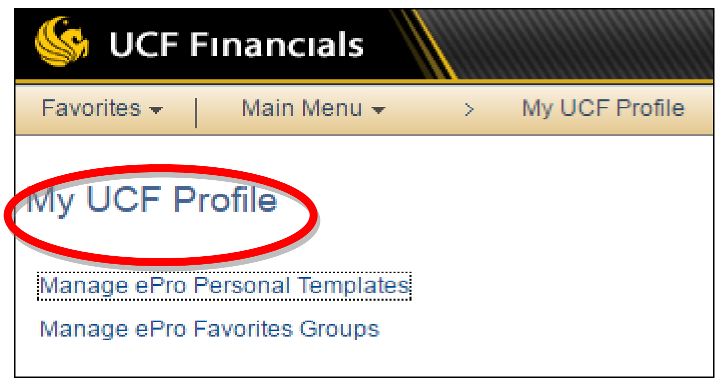
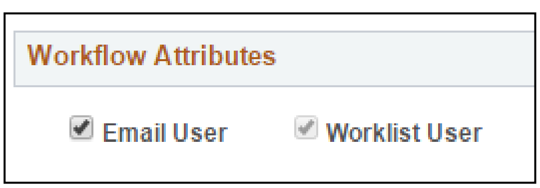
If you are an approver and will be unavailable to approve requisitions for an extended time, it is important that you designate an alternate approver in ePro. Your alternate approver will assume responsibility for approving requisitions on your behalf during the time period that you specify. Therefore, it is important that you select an alternate approver with the same requisition approval access as you. Follow the steps below to select an alternate approver.

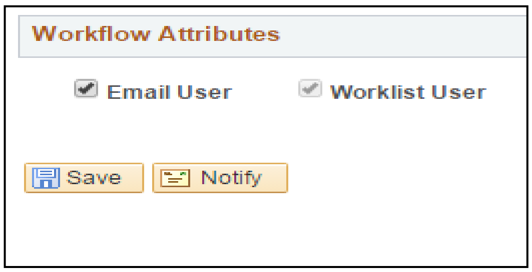
Step	Action
1.	Navigate to **Main Menu** > **My UCF Profile.** 
2.	Enter the alternate approver's **User ID** in the **Alternate User ID** field or click the lookup button to search for a user by name (**Description**). 

Step	Action
3.	Enter the dates the alternate approver will assume responsibility for approving requisitions on your behalf in the **Effective Date From** and **Effective Date To** fields. 
4.	Click the **Save** button. 

Selecting a Notification Method

As an approver, you can receive approval notifications through your worklist, email, or both. By default, worklist is selected guaranteeing you'll receive approval notifications to your worklist. You can also receive notifications to your email if you prefer. The steps below show how to use the **My UCF Profile** page to select a notification method.

Step	Action
1.	Navigate to **Main Menu** > **My UCF Profile.** 
2.	Under the **Workflow Attributes** section, select one or both of the following boxes: • **Email User** (the system automatically selects this option for new users) • **Worklist User** (selected by default) 

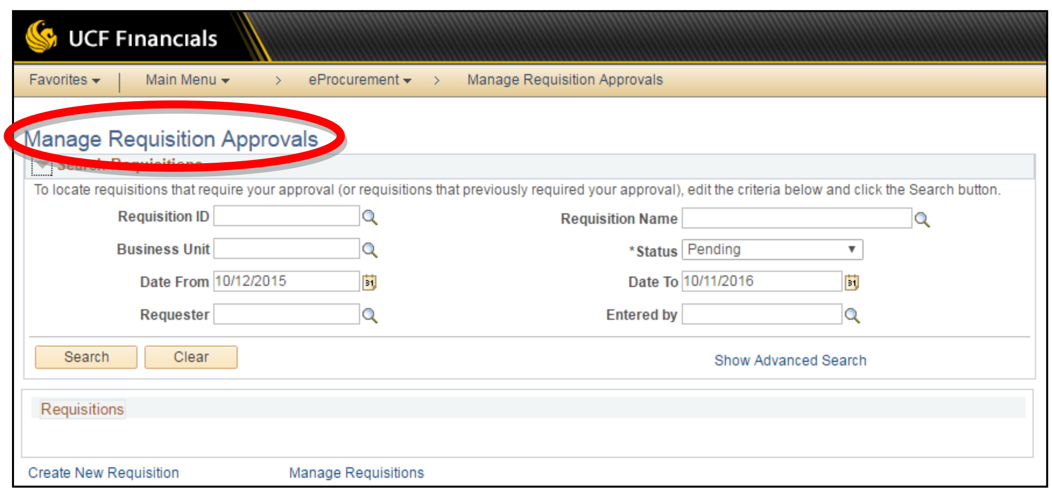
Step	Action
3.	Click the **Save** button. 

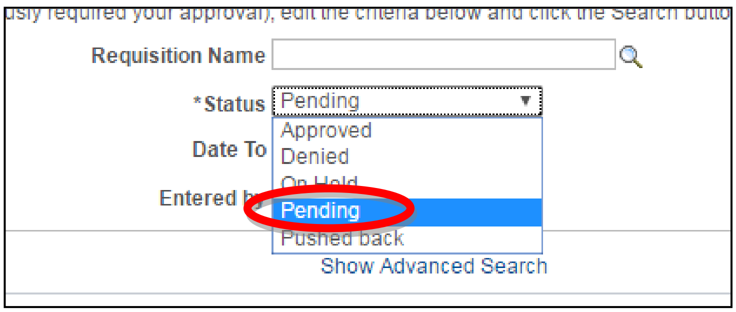
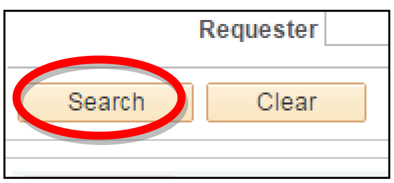
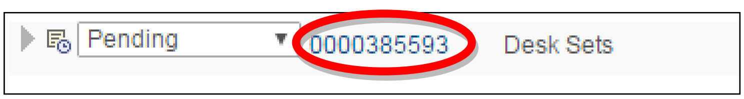
Responding to a Requisition Submitted for Approval

After a requisition is submitted for approval, workflow routes the requisition to the appropriate approver(s), who can take action in one of three ways: 1) through the **Manage Requisition Approvals** page in UCF Financials 2) through the approver's worklist, and 3) through the email the system generates and sends to the approver each time a requisition is created that needs action.

Using the Manage Requisition Approvals Page

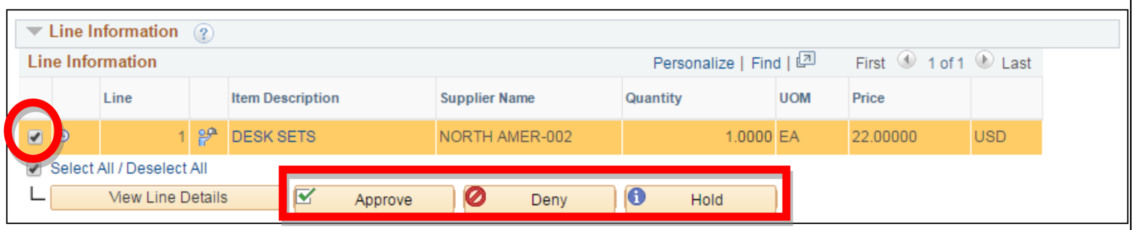
The steps below explain how to access requisitions using the **Manage Requisition Approvals** page. You can use the **Manage Requisition Approvals** page to search for and select a requisition to approve.

Step	Action
1.	Navigate to **Main Menu** > **eProcurement** > **Manage Requisition Approvals**. 

<table>
<tr><td>2.</td><td>Enter information in the fields to reduce the scope of your search. For this example, in the Status dropdown list, select Pending to search for requisitions that are pending approval.

</td></tr>
<tr><td>3.</td><td>Click Search.

</td></tr>
<tr><td>4.</td><td>Click the Req ID link for the requisition you want to access.

</td></tr>
</table>

<table>
<tr><td>5.</td><td>There are three actions you can take:

Approve – Select the lines you want to approve and click Approve.
Deny – Select the lines you want to deny and click Deny. If you deny a requisition, you must include a comment explaining why the requisition was denied. The comment field is located at the bottom of the page.
Hold – Select the lines you want to place on hold and click Hold. If you hold a requisition, you must include a comment explaining why the requisition was placed on hold. The comment field is located at the bottom of the page.



For this example, click Approve.</td></tr>
<tr><td>6.</td><td>An approval confirmation displays. The next approver in line can now approve, deny, or place this requisition on hold.</td></tr>
</table>

Using Email or the Worklist

The steps below explain how to approve a requisition using email or the worklist.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>

Email: Open the email needing attention and click the blue hyperlink text in the last line of the email. Then, enter your **NID** and password to log into the UCF Financials **Requisition Approval** page.

>>> On 12/6/2010 at 4:13 PM, in message <1805040324.01291670002643.JavaMail.psoft@tiger>,
<addyaddy@mail.ucf.edu> wrote:
A requisition line has been entered which requires your attention.

Requester: c0000006
Business Unit: University of Central Florida
Requisition ID: 0000243923
Requisition Name: Sample
Line:1
Description: Srx - Meeting Facilities (studio rental)
Date: 2010-12-06

You can navigate directly to the approval page by clicking the link below.

https://fin.net.ucf.edu/psp/fiprod/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=UCF01&REQ_ID=0000243923&LINE_NBR=1

</td></tr>
<tr><td></td><td>

Worklist: In UCF Financials, click the **Worklist** link, find the requisition you want to access and click its link to enter the **Requisition Approval** page.

Worklist

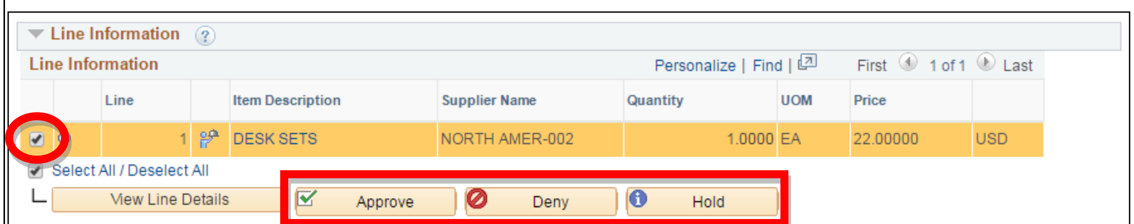
Worklist for addyapprv: Addy Approver

Detail View | Worklist Filters | Feed

Worklist Items | Personalize | Find | View All | First 1-4 of 4 Last

From	Date From	Work Item	Worked By Activity	Priority	Link
Addy	10/11/2016	Approval Routing		2-Medium	Invalid Activity/Event/Worklist name
Addy	10/11/2016	Approval Routing		2-Medium	Invalid Activity/Event/Worklist name
Addy	10/11/2016	Approval Routing		2-Medium	Invalid Activity/Event/Worklist name
Addy	10/11/2016	Approval Routing		2-Medium	Invalid Activity/Event/Worklist name

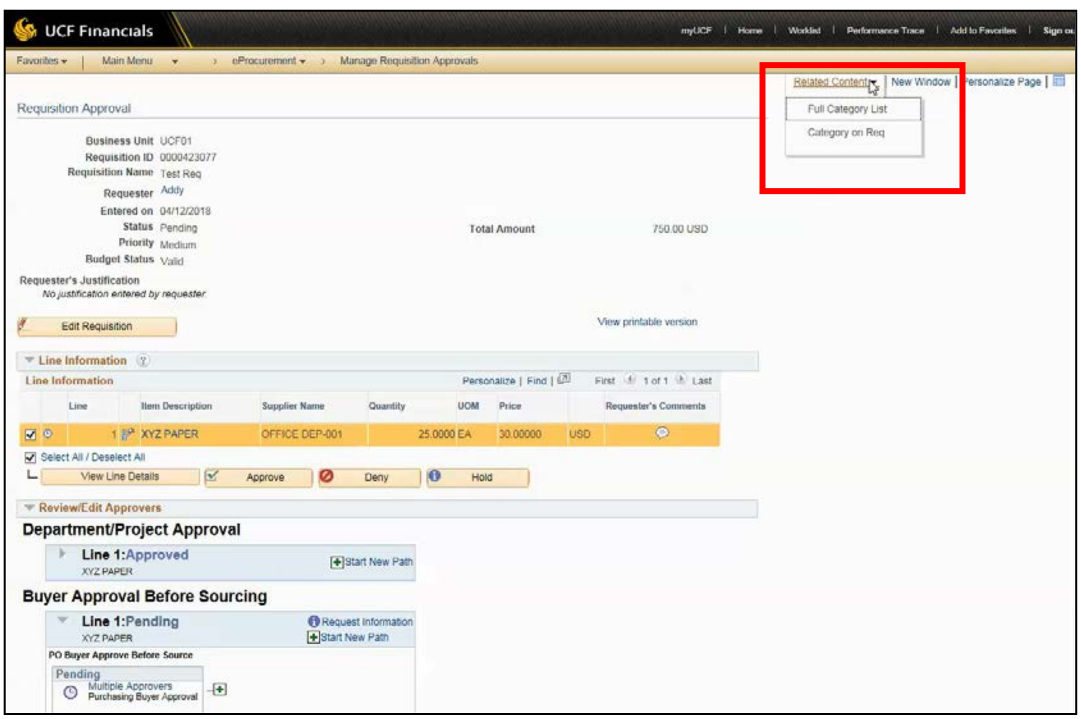
</td></tr>
</table>

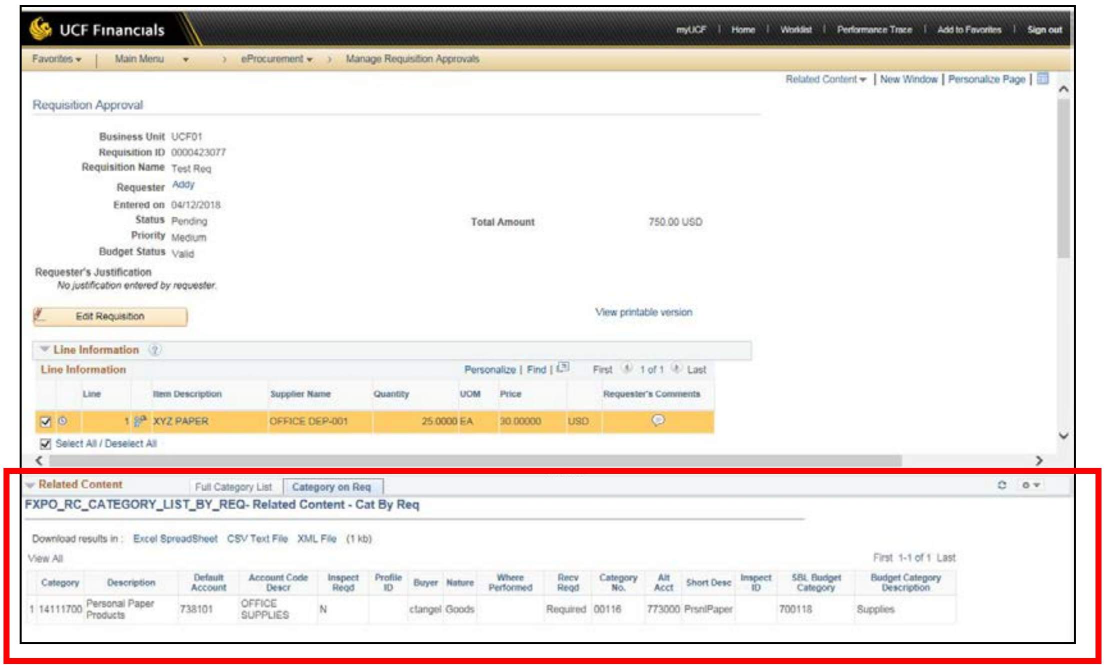
Step	Action
2.	There are three actions you can take: • **Approve** – Select the lines you want to approve and click **Approve**. • **Deny** – Select the lines you want to deny and click **Deny**. If you deny a requisition, you must include a comment explaining why the requisition was denied. The comment box is located at the bottom of the page. • **Hold** – Select the lines you want to place on hold and click **Hold.** If you hold a requisition, you must include a comment explaining why the requisition was placed on hold. The comment box is located at the bottom of the page.  For this example, click **Approve**.
3.	An approval confirmation displays. The next approver in line can now approve, deny, or place this requisition on hold.

Using Related Content to Review Requisition Category information

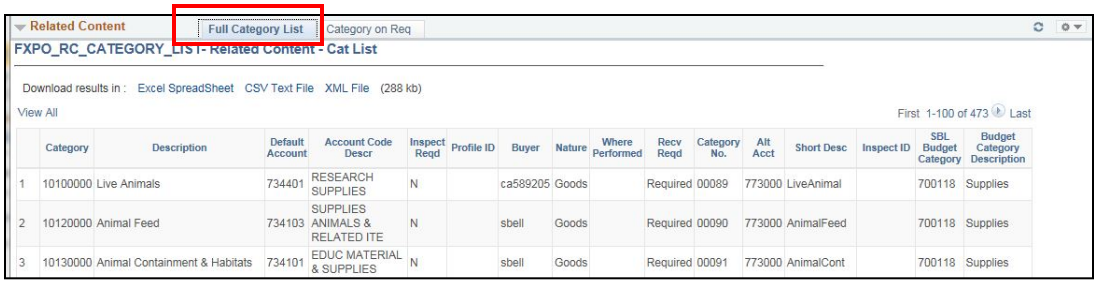
Approvers are responsible for ensuring requisitions are correct prior to approval. In order to review the category that has been assigned on a requisition, approvers may access the Related Content data to review the category/categories that have been assigned to the lines of a requisition. The steps below explain how to use the Related Content link to review the category or categories used on a requisition and how to review the full list of available categories in order to recommend modifications to the category on the requisition to the requestor.

Step	Action
1.	On the **Requisition Approval** page, select the **Related Content** drop down menu in the top right hand corner of the page. Select the **Category on Req** option.



2.	At the bottom of the page, the **Related Content** section displays the **Category on Req** tab.  **NOTE:** *If there are multiple lines on a requisition with the same category, the category will appear only once on this list.* If the requestor has selected the correct category, proceed to reviewing other elements of the requisition for approval. If the requestor has selected an <u>incorrect category</u>, follow the instructions below.

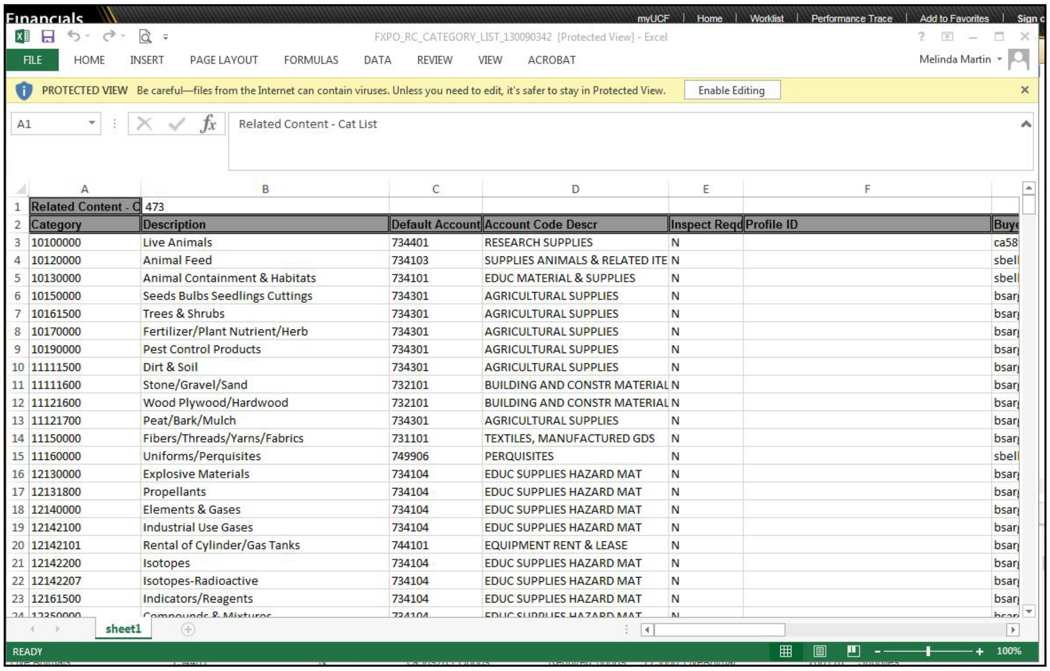
3. Select the **Full Category List** tab in the **Related Content** section of the page to access the full list of categories.



4. Select the **Excel SpreadSheet** link to open the category list in Excel.

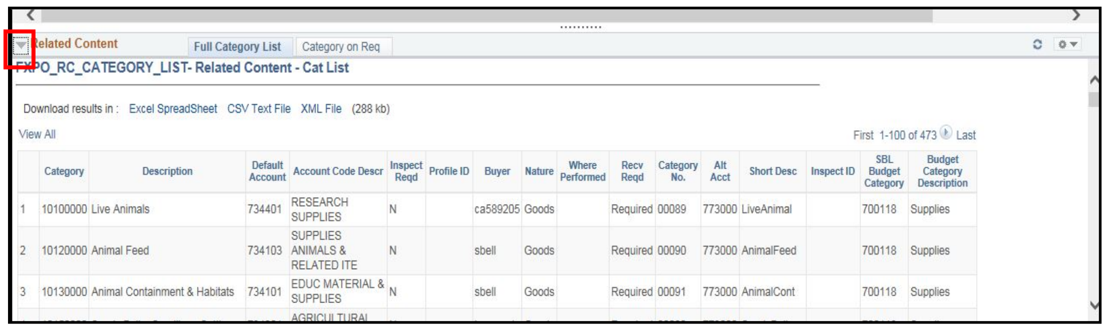
5. Select the **Open** button to open the spreadsheet.

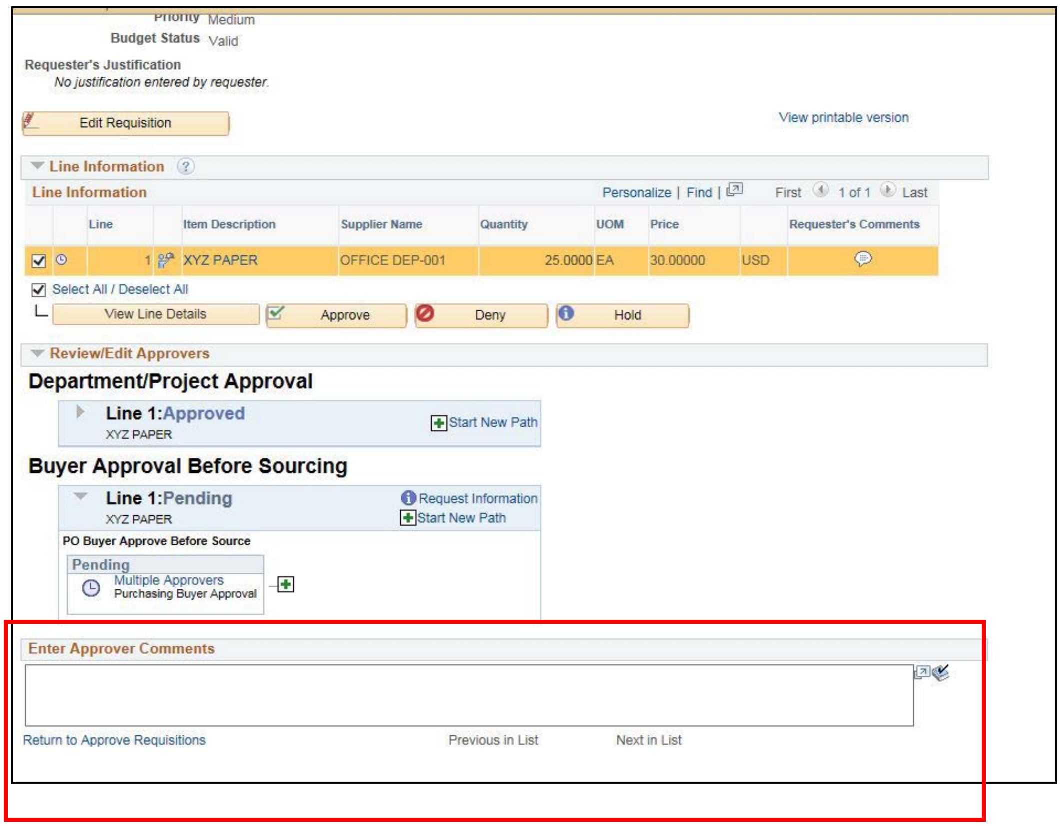
6. The Category spreadsheet displays in a new window. Download the spreadsheet to your computer. Follow steps 5 – 9 in the Addy Note **Choosing a Purchase Category in UCF Financials** to determine a new category code to recommend to the requestor.

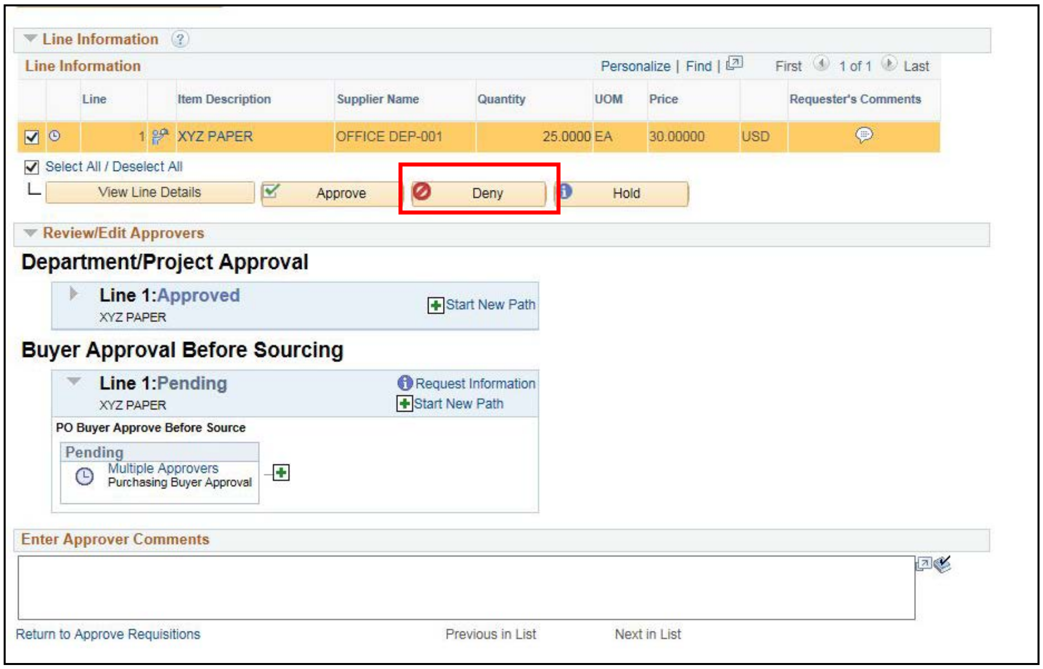


7. Once you have located a new category you wish to recommend to the requestor, close the spreadsheet and return to the Financials application.

8. Close the **Related Content** section of the page by selecting the expand icon.



9.	Type comments related to your recommended category in the **Approver Comments** box. 

10.	Select the **Deny** button to deny requisition approval. 

Reviewing a Requisition to Acquire an Asset

When a requisition is created to purchase an asset, additional items must be included in the requisition. Review the requisition to verify the requester has:

- Entered a description that generally identifies the item, followed by its part or model number. For example, *Copier, Canon 34236-4AL*.

- Added standard line comment **Asset Required Information** (Comment ID: AST; Comment Type: A001) for every line that contains an asset and indicated the appropriate asset life and tagging information on the comment.

- Selected **RECV** (Central Receiving) in the **Ship To** field.

- Selected a **Location** field value that matches the requester's location. If the asset will reside in a different location, however, the **Location** field value should reflect where the asset will be located.

- Completed the following fields on the **Asset Information** tab on the **Checkout - Review and Submit** page:

    - **Business Unit**: This field should display **UCF01**.

    - **Profile ID**: Make sure the value in the **Profile ID** field corresponds to the life of the asset. Most assets have a life of five or more years, so a profile ending in 5 is usually selected, such as PC5.

    - **Asset Custodian**: Verify the **EmplID** field contains the EmplID of the departmental Property Custodian (PCT) responsible for the asset. If no value is displayed in this required field, navigate to **Departmental Authorization** > **Dept/Proj Authorizations** from the UCF Financials main menu, perform a search for the department or project, and then use the **Dept/Project Authorizations** page that displays to locate the employee assigned the **PCT-Property Custodian** code for the department or project.