

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	all requisitions	my own requisitions
	PLUS other requesters'		PLUS other requesters'
	requisitions authorized		requisitions authorized
	through PRC Details*		through PRC Details
Modify:	my own requisitions	all requisitions	my own requisitions
v	PLUS other requesters'		PLUS other requesters'
	requisitions authorized		requisitions authorized
	through PRC Details		through PRC Details
Approve:	no requisitions	requisitions routed to me	requisitions routed to me
		by workflow rules	by workflow rules
Receive:	my own requisitions	requisitions with my Ship	my own requisitions
	PLUS other requesters'	To location PLUS other	PLUS other requesters'
	requisitions authorized	requesters' requisitions	requisitions authorized
	through PRC Details	authorized through PRC	through PRC Details
		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.
	UCF Financials
	Favorites Main Menu > My UCF Profile
	My UCF Profile
	Manage ePro Personal Templates Manage ePro Favorites Groups
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).
	Alternate User
	Alternate User ID:
	Effective Date From: (example:12/31/2000)
	Effective Date To:



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.
	Alternate User
	If you will be temporarily unavailable, you can select an alternate user to receive your routings. Alternate User ID: Effective Date From: (example:12/31/2000) Effective Date To: (example:12/31/2000)
4.	Click the Save button.
	Workflow Attributes Image: Construction of the second se



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
3.	Click the Save button.
	Workflow Attributes
	🕑 Email User 🛛 🖉 Worklist User
	Save E Notify



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.
	Search Contract Search
	Favorites - Main Menu - > eProcurement - > Manage Requisition Approvals
	Manage Requisition Approvals
	To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.
	Requisition ID Q Requisition Name Q
	Business Unit Q *Status Pending V
	Date From 10/12/2015 B Date To 10/11/2016 B
	Requester Q Entered by Q
	Search Clear Show Advanced Search
	Requisitions
	Create New Requisition Manage Requisitions



2.	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.
	usiy required your approval), edit the criteria below and click the Search butto
	Requisition Name
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	Pushed back
	Show Advanced Search
3.	Click Search.
	Requester
	Search Clear
	Clear
4.	Click the Req ID link for the requisition you want to access.
	▶ 🕫 Pending ▼ 0000385593 Desk Sets



5.	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.
	▼ Line Information ②
	Line Information Personalize Find 🖾 First 🕚 1 of 1 🕑 Last
	Line Item Description Supplier Name Quantity UOM Price
	View Line Details Approve Oneny Hold
	For this example, click Approve.
6.	An approval confirmation displays. The next approver in line can now approve, deny, or place this requisition on hold.



Using Email or the Worklist

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

Financials Support Services @ Finance & Accounting



ADDY NOTES



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.
	▼ Line Information ②
	Line Item Description Supplier Name Quantity UOM Price
	(22.00000 USD
	Select All / Deselect All View Line Details Approve Deny Hold
	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 Con the top right hand corner of the page. Select the Category o	tent drop down menu in n Req option.
	6 UCF Financials myUCF Hor	e I Worklist I Performance Trace I Add to Favorites I Sign on
	Favorites + Main Menu + > eProcurement + > Manage Regulation Approvals	
		Related Content
	Requisition Approval	Full Category List
	Business Unit: UCF01 Requisition ID: 000042007 Requisition Name Test Req Requester Addy Entered on: 04/12/2018	Category on Req
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	Budget Status Valid	
	No justification entered by requester	
	Edit Requisition View printable version	
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	Select All / Deselect All	
	View Line Details Approve Deny Hold	
	The Review/Edit Approvers	
	Department/Project Approval	
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	Buyer Approval Before Sourcing	
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The Inform	ation (2)								
Line Informat	on			Personalize Fi	nd 🗐 First	③ 1 of 1 ④ Last			
Line	Item Description	Supplier Name	Quantity	UOM Price	Re	quester's Comments			
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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.

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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.

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