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Methods to Approve/Deny eProcurement Requisitions - Summary

Below are the options to review an eProcurement Requisition for Approval

1) Email
   If you are a part of the workflow, an automated email will come to your Inbox stating “A requisition line has been entered which requires your attention.” The link in the email, will take you directly to the Worklist.

   Please note, eProcurement Approver emails may initially route to your Junk folder. If you are expecting an email, check your Junk folder and move it to your Inbox. Going forward, the emails should appear in your Inbox.

2) Worklist
   Lists all items requiring your attention, including requisitions. The Navigation is Navigator: Worklist > Worklist

3) Non-Expense Approval Tile from the Homepage (New Feature in 9.2)
   SFS 9.2 includes Fluid technology. This new feature displays tiles from your homepage. It gives you direct access to pages to complete events in SFS. The tiles listed on your homepage are based on your authorization level. All Approvers should have a Non-Expense Approver Tile. This tile provides direct access to the Worklist.
Methods to Approve/Deny eProcurement Requisitions - Details

Email

A requisition line has been entered which requires your attention.

Requester: 
Business Unit: UW Systemwide
Requisition ID: 0000000081
Requisition Name: COMPUTER EQUIPMENT
Line: 1
Description: COMPUTER EQUIPMENT
Date: 2018-02-27

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

https://test.sfs_test.wisconsin.edu/psp/sfrdev-td/EMPLOYEE/SFS/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?
Action=U&BUSINESS_UNIT=UWSYS&REQ_ID=0000000081&LINE_NBR=1

Click the link in the email to review the requisition for approval from the Approval Page in SFS.

Go to the Approve a Requisition or Deny a Requisition section of this document for more details on approving and/or denying a requisition.
Worklist

The Worklist will list all items requiring your attention.

Navigator: Worklist > Worklist

Click the requisition hyperlink requiring your attention. You will be brought to the Requisition Approval Page.

Go to the Approve a Requisition or Deny a Requisition section of this document for more details on approving and/or denying a requisition.
Approving from the Non-Expense Approvals Tile – New Feature in 9.2

All Approvers should have a Non-Expense Approvals Tile. The number in the bottom right corner of the Approval tile, displays the number of items requiring your attention.

1. Per the below example, there are 2 items that need to be reviewed.

2. Click the Non-Expense Approvals tile to access these records.

3. The Worklist page will be displayed. Per this example, 1 purchase order and 1 requisition need to be reviewed.

4. To access the requisition, click the hyperlink on the requisition.

5. The Requisition Approval Page will be displayed, where the requisition can be reviewed for approval.
Reviewing a Requisition for Approval

From the Approval Page you can Approve or Deny the requisition immediately or complete one of the below tasks before Approving or Denying.

- Review Line Comments and Attachments (if any)
- View or Edit the Requisition Details
  - Editing the requisition will reinitiate the approval workflow if the price and/or quantity are changed.
- View Requisition Approval Chain
- Insert an additional Approver and/or Reviewer

Review Line Comments and Attachments

1. To review Line comments and attachments, select the item and click the item hyperlink.

2. Click the “Line comments and attachments” hyperlink to view the comments and/or attachment(s).
3. The below page will display the comments and attachment(s). Click the attachment hyperlink to view the document.

4. Click the “X” in the top right corner, and click the “Back to Header” tab to go back to the Approval page.

View or Edit Requisition Line Item Details

1. To View or Edit line item details on the requisition, click the Edit Requisition hyperlink from the Approval Page.
2. The Edit Requisition – Review and Submit page will be displayed.

   a. If editing the requisition details, complete all the necessary edits and click . Approval workflow may reinitiate, depending on the type of edit and/or your authorization level. If the approval workflow is not reinitiated, the below confirmation page will be displayed.

   b. Click the Approval tab at the top left corner to go back to the Approval Page to complete the approval process.

   c. If just viewing the requisition details, view the requisition as needed and click the Approval tab at the top left corner of the screen to go back to the approval page.
View the Requisition Approval Chain

1. To view the requisition Approval Chain, click Approval Chain hyperlink.

2. The individuals in the Approval Chain will be listed. If there is more than 1 approver, “Multiple Approvers” will be listed. Click the Multiple Approvers hyperlink to view the approvers.

3. Click the “X” in the top right hand corner to go back to the approval page.
Insert an Additional Approver or Reviewer

1. From the Approval Page, click the Approval Chain hyperlink.

2. The Approval Chain box will appear. Click the “+” to insert an additional approver or reviewer.
3. The “Insert additional approver or reviewer” message box will appear. If you know the EMPL ID enter it, select the radio button next to Approver or Reviewer and Click Insert.

4. If the EMPL ID is not known, click the magnifying glass to find the approver.

5. The Lookup page will appear. Click the carrot to display the Search Criteria fields. Enter as much of the person’s name as you can, and click Search.

6. The search results will be listed. Click the hyperlink on the person’s name to pull them into the workflow.
7. The “Insert additional approver or reviewer” page will appear. Select the radio button next to Approver or Reviewer. **Approvers are required to approve the requisition. Reviewers are just reviewing the requisition.**

8. Click Insert to pull the Reviewer or Approver into the workflow.

9. Click the “X” in the top right hand corner to go back to the approval page.
Approving a Requisition

1. Check the box next to the line item and click **Approve** to approve the requisition.

2. The below message box will appear. Enter comments if desired and click the **Submit** button.

3. “Approve” will route the requisition forward in the approval workflow. The Buyer will provide the final approval.

4. Final approval of the requisition will trigger an automatic email to the Requester indicating the requisition has been fully approved.
5. The link in the email will display the below confirmation page.

![Confirmation Page]

6. The fully approved email is the only notification the Requester will receive. The Requester will not receive an email when the Purchase Order is created.
Denying a Requisition

1. Below is the requisition Approval Page.

2. To Deny a requisition, click

3. The below message will appear

4. Comments are required if denying a requisition. They should include the reason for the denial and/or instructions on what needs to be completed for the requisition to be approved.

5. Click
6. The Requester will receive a Denied email.

The following requisition has been "Denied":

Requester: 0656855
Business Unit: UW La Crosse
Requisition ID: 000000003
Requisition Name: 000000003
Date: 2018-09-14

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


7. Please note, “Deny” ends the requisition, and automatically changes the Request State of the requisition to “Denied.” The Requester will have to create a new requisition with the appropriate adjustments. They can use the “Copy” function to create the new requisition.
Reviewing Requisition Comments and Attachments

1) Select and click the item hyperlink from the Approval page

2) The below page will appear

3) Click the arrow to view distribution details, if you are authorized to view the distribution.

4) Click the “Line comments and attachments” link to view comment(s) and attachment(s).
5) Click the attachment link to open the document.

6) After reviewing the requisition comments and attachments, continue with the process to Approve or Deny the requisition.
Adding Alternate Approver on a Temporary Basis

If an approver knows they will be unavailable to approve requisitions, due to vacation or other circumstances, they can insert an alternate approver to receive routed requisitions.

This is a good practice, because it prevents requisitions from being held up and prevents the BU Administrator from having to reroute requisitions for approval.

These updates can be completed from the General Profile Information Page. The navigation is Navigator > My System Profile.

Update the highlighted fields to insert an Alternate User. After the updates are completed, click Save.

Make sure to notify the Alternate User that they are being added as an Alternate User. Instruct them to verify Email User is checked on the Workflow Attributes section of their General Profile Information page.
# Revision Control

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<td>Aaron Dise</td>
<td>UAT</td>
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<td>5/24/2018</td>
<td>Denise Mcdonald</td>
<td>9.2 Upgrade</td>
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<td>3.0</td>
<td>8/16/2018</td>
<td>Denise Mcdonald</td>
<td>9.2 Adding alternate approver comments</td>
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