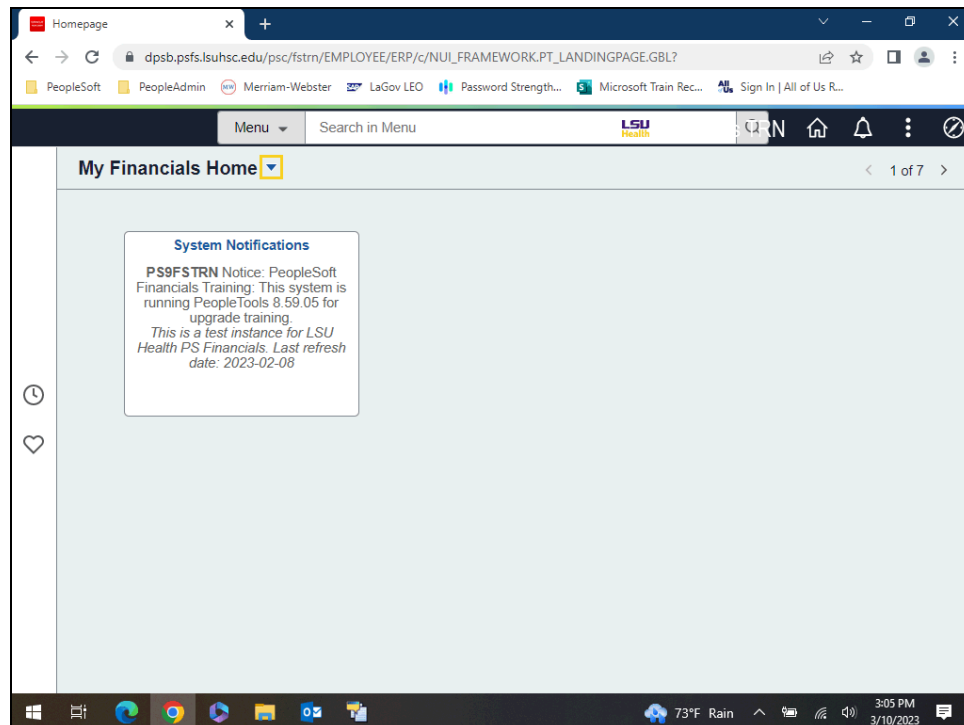# Approving Requisitions
Fluid

Table of Contents

Approving Requisitions Fluid

Opening the Worklist

Topic Contents:

1. Navigate to LSU Financials Homepage
2. Select appropriate job function tile
3. Define Worklist
4. Items included on Worklist
5. Items **not** included on Worklist
6. Change Priority setting
7. Define link information
8. Purpose of link
9. Not used fields

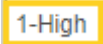| Step	Action
1.	In this topic, users will learn about the **Requisition Approval Process**. The Approval Process defines how a transaction is routed for approval within the University. It is used to grant, deny or place on hold, the purchase of goods or services based on State policy, legitimacy of the purchase, and business needs.

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Step	Action
2.	Requisitions requiring approval can be viewed and acted upon via the approver's **Worklist**. The Worklist is accessed through the **LSU Health Financials** homepage where tiles are grouped by job function. Both the Business Manager and Purchasing tiles may be used to access the approver's Worklist. Click the **Homepage Selector** dropdown button to activate the menu. ▼
3.	Click the **LSU Health Financials** menu. LSU Health Financials
4.	In this example, the **Purchasing** tile will be selected to access the user's **Worklist**. Click the **Purchasing** button.
5.	The **My Worklist - Summary View** is the first option in the left menu list. The system defaults to this option and displays the user's **Worklist** in the right view pane. *NOTE: The Worklist can also be accessed by navigating to:* *NavBar > Navigator > Worklist > My Worklist* Click the **Navigation Area** button. II
6.	The **Worklist** is an organized list of tasks assigned to the user. It is used to view, assign a priority to, and process work items. In this example, the Worklist displays requisitions waiting for approval.
7.	The **Worklist** will <u>not</u> include all requisitions for the **Business Unit**. If a user is set up as a primary and/or secondary (i.e., backup) approver, it will have <u>all</u> items coded to the <u>department</u> included on his/her Worklist. If the user is set up to approve for more than one department (cost center), requisitions from <u>multiple</u> departments may appear on the user's Worklist.
8.	If an Approver at the campus level has the ability to enter a requisition, his/her requisition will <u>not</u> appear on the Worklist if the total amount of the requisition is less than **$10,000**. By *unchecking* the Hold From Further Processing box and *saving* the requisition, the system will automatically change the status of the requisition to Approved. The requisition will then automatically be routed to Purchasing.

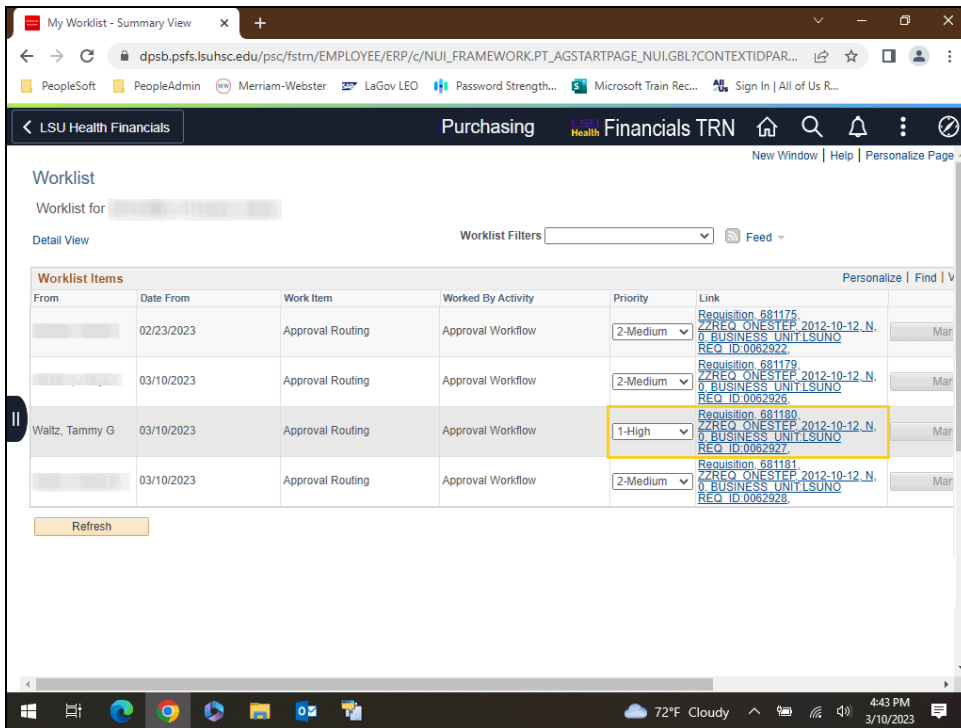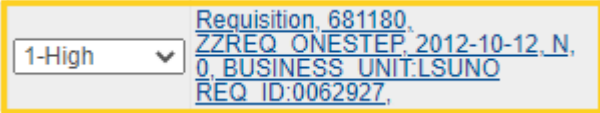| Step	Action
9.	Requisitions do not have to be approved in any particular order. Users may prioritize worklist items using the **Priority** column. The Priority defaults to 2-Medium. You may select the drop-down arrow and choose the priority setting for each item. Changing the Priority setting will not alter the order of the list items. Click the button to the right of the **Line 2 Priority** field.
10.	Click the **High** list item.
11.	The priority has changed to High but as noted previously, it has not changed the display order.
12.	The **Link** column displays information in the following order: **1.** Work Type (e.g., Requisition, Purchase Order, Voucher, etc.) **2.** Sequencing Number **3.** Number of Approval levels **4.** Business Unit **5.** Work Type ID Number
13.	The **Link** provides access to the page where the user will work the item. Links are displayed from *oldest to newest*. When the user has completed the required task, the link will be *removed* from the **Worklist**.
14.	The **Marked Worked** and **Reassign** options are not used by **LSUNO or HCSD**.
15.	This completes *Opening the Worklist*. **End of Procedure.**

Approve a Requisition

Topic Contents:

1. Requisition Approval Fields, Buttons and Links
2. Select single or multiple rows
3. View Details
4. Confirmation message
5. Approval levels
    a. LSUNO - one-step
    b. HCSD - two-step
6. Approved requisition removed from Worklist
    a. Approved requisition added to requester worklist
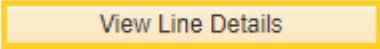   **b.** Marked As Worked button
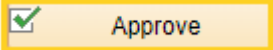

Step	Action
1.	In this exercise, you will approve **LSUNO Req ID: 0060263** which has been marked with a High priority. Click the **LSUNO REQ_ID:00602603** link.

Step	Action
2.	**Requisition Approval Fields, Buttons and Links** **Business Unit** – operational unit within LSU Health that tracks and maintains its own requisitions and purchase orders (e.g., LSUNO, LSUSH, HCSD, etc.) **Requisition ID** – seven-digit identifier assigned to the requisition **Requisition Name** – requisition purpose or requisition id **Requestor** – user id of person who entered the requisition **Entered On** – date the requisition was initiated in the system **Status** – the stage the requisition in the purchase order process **Priority** – the approval preference of the requisition (e.g., High, Medium, Low) **Budget Status** – the budget check status of the requisition **Requester Justification** – explanation as to why items are being requisitioned **Edit Requisitions** – link to the requisition header
3.	**Requisition Approval Fields, Buttons and Links (continued)** **Total Amount** - total cost of requisition items **View Printable Version** - **cannot be used** - the requisition must be printed using the Report Manager *NOTE: See the View Approvals and Print a Requisition topic in the Managing Requisition manual for detailed instruction on how to print a requisition.*
4.	**Requisition Approval Fields, Buttons and Links (continued)** **Line Information** - displays each line items on the requisition - fields included are Item Description, Supplier Name, Quantity, UOM, and Price **View Line Details** - contains all Line Information plus chartfield information
5.	**View Line Details** panel.
6.	**Requisition Approval Fields, Buttons and Links (continued)** **Review/Edit Approvers** - displays the number of approval steps required and provides a link to view a list of users who are eligible to approve the requisition **Enter Approver Comments** - approvers may enter comments regarding the requisition - comments are <u>required</u> if the requisition is *denied* or *placed on hold*
7.	**Requisition Approval Fields, Buttons and Links (continued)** **Approve, Deny and Hold** - actions that may be taken on a requisition **Return to Worklist** - link to return you to the Worklist

Step	Action
8.	Users can view line details for a single line or multiple lines on the requisition. A user may view a single line simply by checking the **box** to the left of the Item Description field and selecting **View Line Details**. The **Select All/Deselect** All option can be used to check all line items on the requisition. Click the **Select All/Deselect All** option. ☐ Select All / Deselect All
9.	Click the **View Line Details** button. View Line Details
10.	Click the **Requisition** tab. ✕
11.	Click the **Approve** button. ☑ Approve
12.	You will receive this confirmation page showing the requisition has been approved. The system automatically saves the requisition once it is approved.
13.	*NOTE: LSUNO and LSUNA use a one-step approval process. Once the department approver approves the requisition, the status will change to Approved from Pending as shown in this example. The requisition will then be routed to Purchasing for sourcing.*
14.	*NOTE: HCSD Business Units use a two-step approval process. The requisition is first approved by the department approver and then by Purchasing. The HCSD Business Units will receive a conformation page stating the requisition is approved by the department approver. It will also show that the requisition will be automatically routed to Purchasing for approval. The status of the requisition will not change from Pending to Approved until Purchasing approves the requisition.* *A multiple Approvers link will also display on the confirmation page so you may view a list of users who can approve the requisition.*
15.	Click the **Return to Worklist** link. Return to Worklist
16.	Requisition **0062927** has been approved, so it is no longer on the Worklist. *NOTE: When the requisition is approved, an entry will be made in the requester's Worklist indicating the requisition has been approved. The requester will click the "Marked As Worked" button to remove the entry from the Worklist.*
17.	This completes Approve a Requisition. **End of Procedure.**

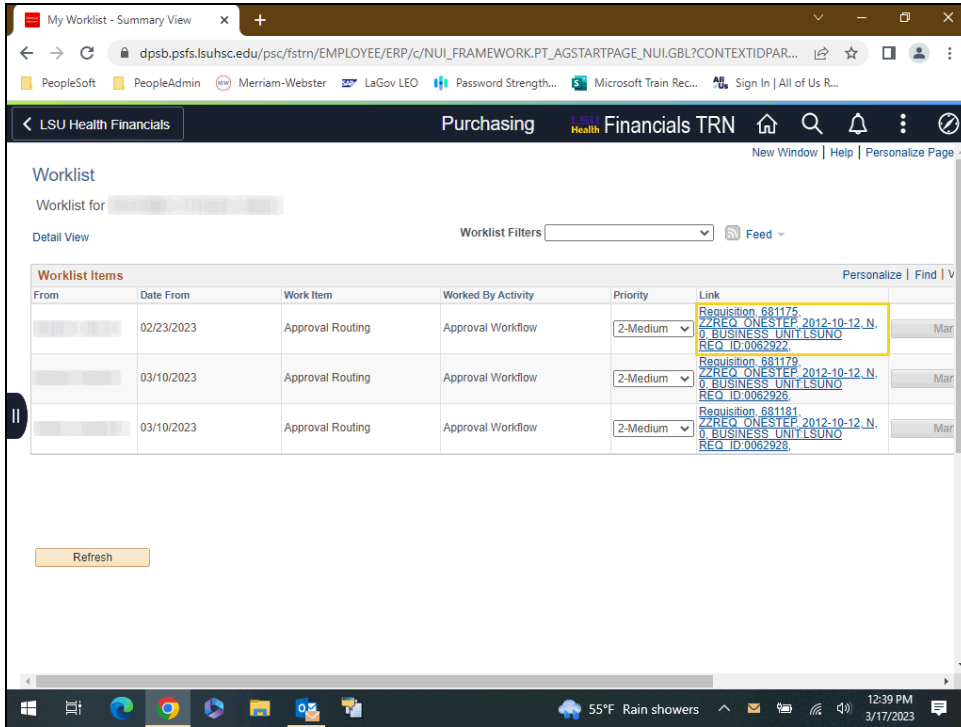## Deny a Requisition

Topic Contents:

1. Reason for denying a requisition
2. What can be denied
    a. Individual rows - No
    b. Entire Requisition - Yes
3. Comments must be entered if requisition denied
4. Denied **r**equisition removed from Worklist

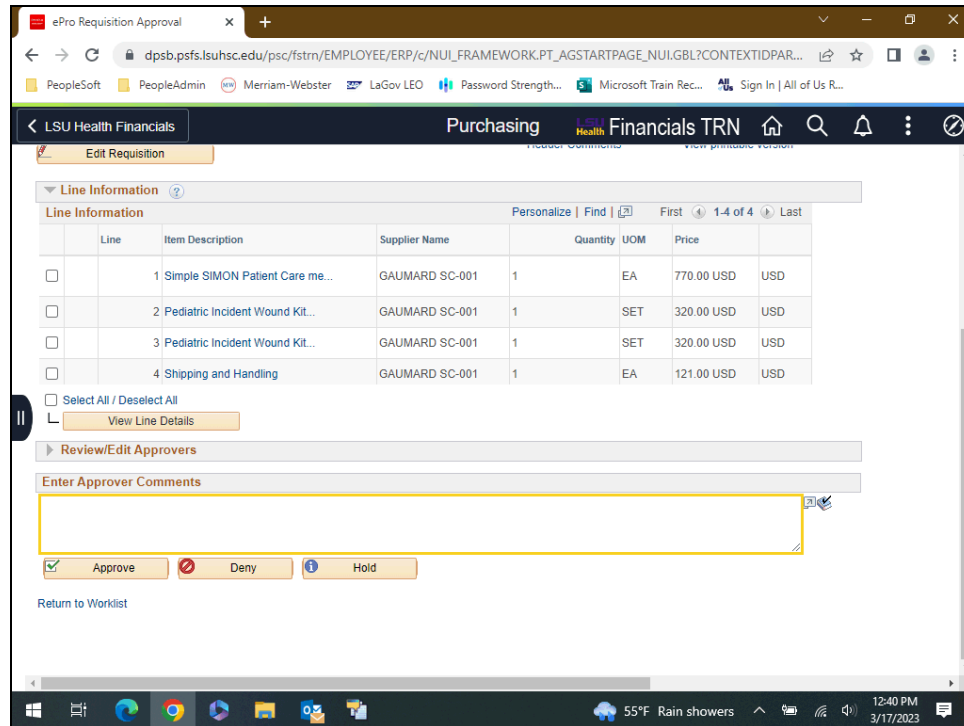| Step	Action
1.	There are many reasons a requisition may be denied: items are no longer needed, duplicate requisition, change of vendor, etc. If you deny a requisition and later determine the items are needed, you can modify the denied requisition and it will rout back to the worklist for approval.

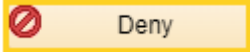| Step	Action
2.	For this example, you will <u>deny</u> **Req ID: 0062922** because it is a duplicate requisition. Click the **Req ID: 0062922** object. Requisition, 681175, ZZREQ_ONESTEP, 2012-10-12, N, 0, BUSINESS_UNIT:LSUNO REQ_ID:0062922,
3.	*NOTE: Individual requisition lines cannot be selected to deny; you must deny the entire requisition.* Click the **Down** scrollbar. ▼

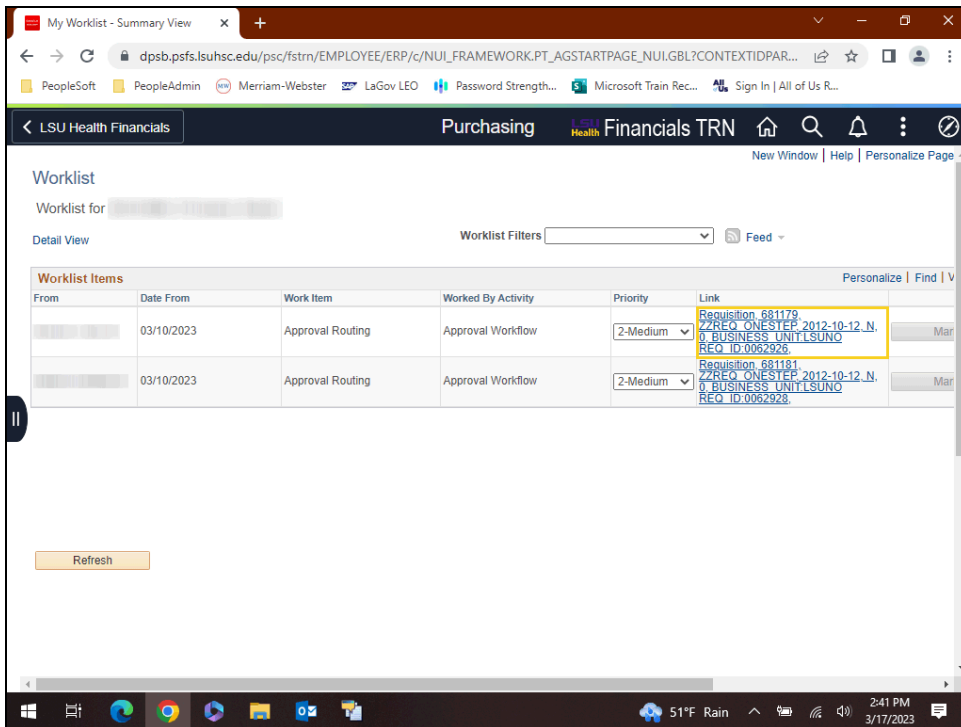| Step	Action
4.	When denying a requisition, comments <u>must</u> be entered explaining why the requisition is being denied. *NOTE: If the requisition should be corrected and resubmitted, comments to that effect should be included in the explanation of denial.* Enter the desired information into the **Enter Approver Comments** field. Enter "**Duplicate requisition**".
5.	Click the **Deny** button. ⊘ Deny
6.	A confirmation is received that the requisition has been denied. An email will be generated by the system, and sent to the requester, stating the requisition has been denied. Click in the **Return to Worklist** field. Return to Worklist
7.	**Req ID: 0062922** has been removed from the Worklist.
8.	This completes *Deny a Requisition*. **End of Procedure.**

Hold a Requisition

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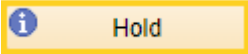**Topic Contents:**

1. Reason for placing requisition on Hold
2. What can be placed on Hold
    a. Individual rows - No
    b. Entire Requisition - Yes
3. Comments must be entered if requisition is placed on Hold
4. Confirmation message received
    a. Email sent to requester explaining why requisition is on Hold
    b. Return information must be sent to Approver timely
5. On Hold **r**equisition is not <u>removed</u> from Worklist

Step	Action
1.	In this exercise, the requisition will be placed on **Hold** to determine is a discount is available. Click the **Req ID: 0062926** link.
2.	Click the **Select All / Deselect All** option. ☐ Select All / Deselect All
3.	Click the **View Line Details** button. View Line Details

Step	Action
4.	Review requisition line chartstrings, quantities, totals, etc. Click the **Close Tab** button. ![close tab button]
5.	Click the **Down** scrollbar. ![down scrollbar]
6.	Enter the desired information into the **Enter Approver Comments** field. Enter "**Check to determine if discount is available on these items**".
7.	*NOTE: A single line on the requisition cannot be placed on Hold. The entire requisition must be placed on Hold.* Click the **Hold** button. ⓘ Hold
8.	The requisition is placed on **Hold**. The system will automatically send a return email to the requester stating the requisition has been placed on hold and why. It will be up to the requester to check the information requested and send a response to the Approver. The Approver will then go back in the system and either approve or deny the requisition. *NOTE: Requisitions cannot be placed on endless hold. Please make sure you are reviewing any On Hold requisitions regularly.* Click in the **Return to Worklist** field. Return to Worklist
9.	The requisition remains on the worklist since it has been placed on Hold rather than approved or denied.
10.	This completes *Hold a Requisition*. **End of Procedure.**