

Approving a Requisition via Worklist



Once a requisition has been created and submitted for approval, the requisition will appear in the approver's worklist. An approver can review, approve, or deny the requisition. Follow the steps below to approve a requisition via the worklist.

Step 1. Log into the Finance Application with your FIN Username and Password.

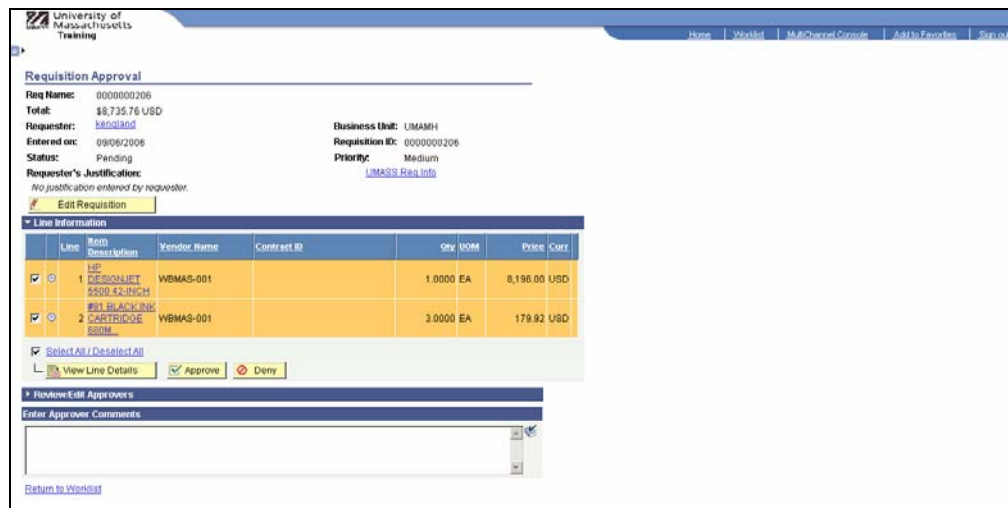
Click the **Worklist** link at the top of the page.

The **Worklist** page opens.



Step 2. Click the requisition **Link** you plan to approve.

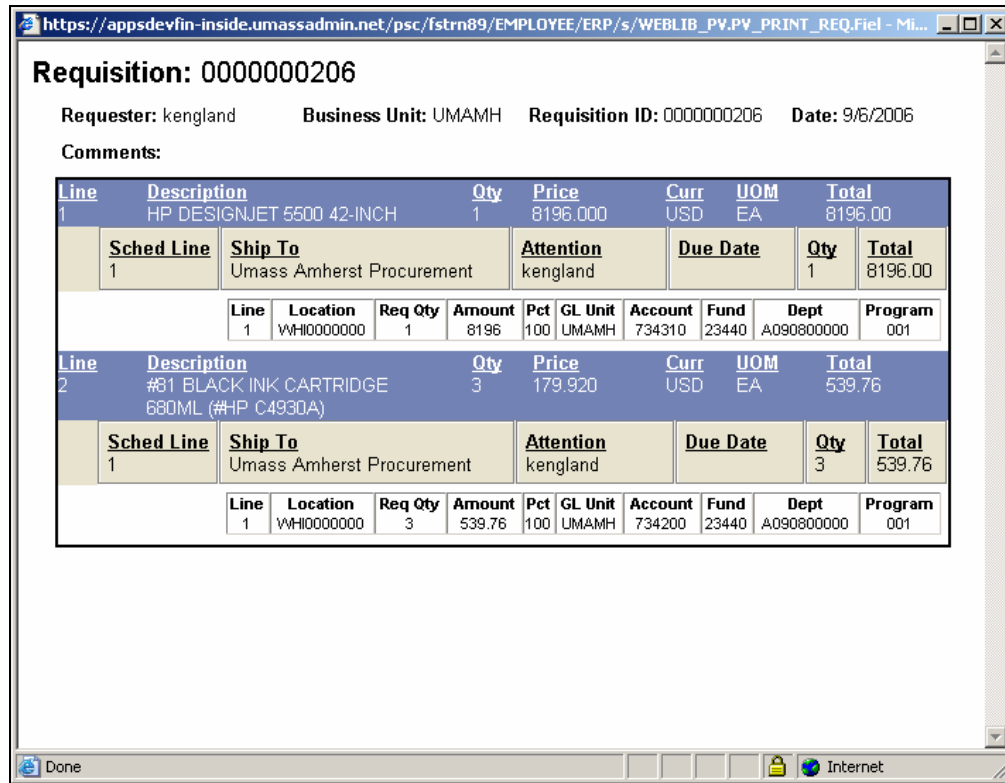
The **Requisition Approval** page opens.



Step 3. Click the **Select All** checkbox if the lines are not selected.

Click  View Line Details

The Line Information opens in a new window.




Requisition: 0000000206


Requester: kengland Business Unit: UMAMH Requisition ID: 0000000206 Date: 9/6/2006

Comments:

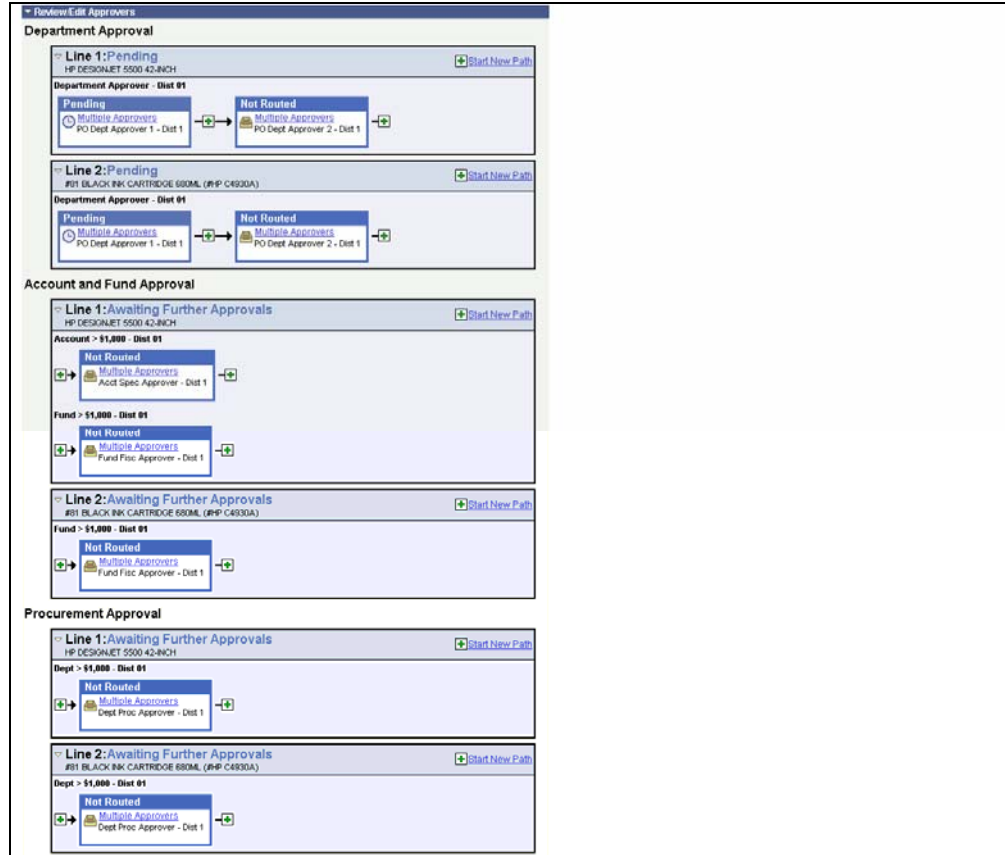
Line	Description	Qty	Price	Curr	UOM	Total			
1	HP DESIGNJET 5500 42-INCH	1	8196.000	USD	EA	8196.00			
Sched Line		Ship To		Attention		Due Date			
1		Umass Amherst Procurement		kengland		Qty: 1, Total: 8196.00			
Line	Location	Req Qty	Amount	Pct	GL Unit	Account	Fund	Dept	Program
1	WH10000000	1	8196	100	UMAMH	734310	23440	A090800000	001
Line	Description	Qty	Price	Curr	UOM	Total			
2	#81 BLACK INK CARTRIDGE 680ML (#HP C4930A)	3	179.920	USD	EA	539.76			
Sched Line		Ship To		Attention		Due Date			
1		Umass Amherst Procurement		kengland		Qty: 3, Total: 539.76			
Line	Location	Req Qty	Amount	Pct	GL Unit	Account	Fund	Dept	Program
1	WH10000000	3	539.76	100	UMAMH	734200	23440	A090800000	001

Step 4. Review all line information; then click the  at the top right corner.

Return to the **Requisition Approval** page.

Step 5. Click the  button next to **Review/Edit Approvers**.

The **Review/Edit Approvers** section opens.



Review/Edit Approvers

Department Approval

Line 1: Pending [Start New Path](#)
HP DESIGNJET 5500 42-INCH
Department Approver - Dist 01
Pending: Multiple Approvers (PO Dept Approver 1 - Dist 1) → Not Routed: Multiple Approvers (PO Dept Approver 2 - Dist 1)

Line 2: Pending [Start New Path](#)
#81 BLACK INK CARTRIDGE 680ML (RFP C4930A)
Department Approver - Dist 01
Pending: Multiple Approvers (PO Dept Approver 1 - Dist 1) → Not Routed: Multiple Approvers (PO Dept Approver 2 - Dist 1)

Account and Fund Approval

Line 1: Awaiting Further Approvals [Start New Path](#)
HP DESIGNJET 5500 42-INCH
Account > \$1,000 - Dist 01
Not Routed: Multiple Approvers (Acct Spec Approver - Dist 1)

Fund > \$1,000 - Dist 01
Not Routed: Multiple Approvers (Fund Fisc Approver - Dist 1)

Line 2: Awaiting Further Approvals [Start New Path](#)
#81 BLACK INK CARTRIDGE 680ML (RFP C4930A)
Fund > \$1,000 - Dist 01
Not Routed: Multiple Approvers (Fund Fisc Approver - Dist 1)

Procurement Approval

Line 1: Awaiting Further Approvals [Start New Path](#)
HP DESIGNJET 5500 42-INCH
Dept > \$1,000 - Dist 01
Not Routed: Multiple Approvers (Dept Proc Approver - Dist 1)

Line 2: Awaiting Further Approvals [Start New Path](#)
#81 BLACK INK CARTRIDGE 680ML (RFP C4930A)
Dept > \$1,000 - Dist 01
Not Routed: Multiple Approvers (Dept Proc Approver - Dist 1)


Step 6. Scroll to the **Enter Approver Comments** box.

The screenshot shows the 'Requisition Approval' page. At the top, there are navigation links: Home, Worklist, MyChannel Controls, Add to Favorites, and Logout. The page title is 'Requisition Approval'. Below the title, there are fields for 'Req Name: 0000000206', 'Total: \$8,735.76 USD', 'Requester: hmg@uvm.edu', 'Entered on: 09/08/2006', 'Status: Pending', and 'Requester's Justification: No justification entered by requester.' There are also fields for 'Business Unit: UMMBH', 'Requisition ID: 0000000206', and 'Priority: Medium'. A yellow 'Edit Requisition' button is visible. Below this is the 'Line Information' section with a table:

Line	Item Description	Vendor Name	Contract ID	Qty	UOM	Price	Curr
1	HP DESIGNJET 5500 42-INCH	WBMAS-001		1.0000	EA	8,196.00	USD
2	#81 BLACK INK CARTRIDGE 680M...	WBMAS-001		3.0000	EA	179.92	USD

Below the table are buttons for 'Select All / Deselect All', 'View Line Details', 'Approve', and 'Deny'. At the bottom, there is a section titled 'Enter Approver Comments' with a text input area and a 'Return to Worklist' link.



Note: Before approving or denying a requisition, you can click , which accesses the **Edit Requisition (Review and Submit)** page. Here you can make changes to the requisition, based on your security access.


Step 7. Fill in **Enter Approver Comments** (if needed).

The screenshot shows the 'Enter Approver Comments' section. It has a title bar 'Enter Approver Comments' and a text input area with the placeholder text 'Enter Approver comments here, if needed.' There are scroll bars on the right side of the input area.

Step 8. Scroll up to the **Line Information** section.

The screenshot shows a close-up of the 'Line Information' section. The table is the same as in Step 6. Below the table, the 'Select All / Deselect All' checkbox is circled in blue. The 'Approve' and 'Deny' buttons are also visible.

Step 9. Click the **Select All** checkbox, or select an individual line.

Step 10. Click the  button (located below the **Line Information** section).

The **Confirmation** page opens.

Requisition Approval

Confirmation

✓ 000000206 has been routed for further approval.

Review/Edit Approvers

Department Approval

Line 1: Completed
HP DESIGNJET 5500 42-INCH [View Comments](#)

Department Approver - Dist 01

Approved → Auto Approved

Approval Comment History
Training01 at 9/6/2006 - 3:58 PM
Enter Approver Comments, if needed.

Line 2: Completed
#81 BLACK INK CARTRIDGE 680ML (RIP C4930A) [View Comments](#)

Department Approver - Dist 01

Approved → Auto Approved

Approval Comment History
Training01 at 9/6/2006 - 3:58 PM
Enter Approver Comments, if needed.

Account and Fund Approval

Line 1: Pending
HP DESIGNJET 5500 42-INCH [View Comments](#)

Account > \$1,000 - Dist 01

Pending

Multiple Approvers
Acct Spec Approver - Dist 1

Fund > \$1,000 - Dist 01

Pending

Multiple Approvers
Fund Fin Approver - Dist 1

Approval Comment History
Training01 at 9/6/2006 - 3:58 PM
Enter Approver Comments, if needed.

Line 2: Pending
#81 BLACK INK CARTRIDGE 680ML (RIP C4930A) [View Comments](#)

Fund > \$1,000 - Dist 01

Pending

Multiple Approvers
Fund Fin Approver - Dist 1

Approval Comment History
Training01 at 9/6/2006 - 3:58 PM
Enter Approver Comments, if needed.

Procurement Approval

Line 1: Awaiting Further Approvals
HP DESIGNJET 5500 42-INCH [View Comments](#)

Dept > \$1,000 - Dist 01

Not Routed

Multiple Approvers
Dept Proc Approver - Dist 1

Approval Comment History
Training01 at 9/6/2006 - 3:58 PM
Enter Approver Comments, if needed.

Line 2: Awaiting Further Approvals
#81 BLACK INK CARTRIDGE 680ML (RIP C4930A) [View Comments](#)

Dept > \$1,000 - Dist 01

Not Routed

Multiple Approvers
Dept Proc Approver - Dist 1

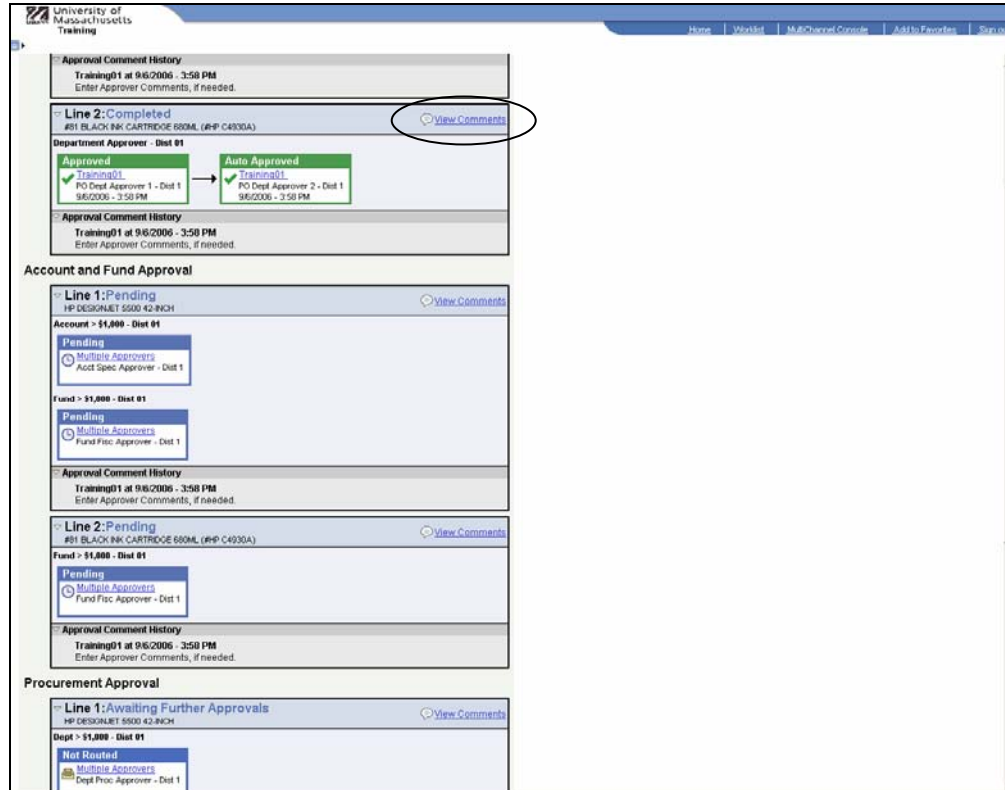
Approval Comment History
Training01 at 9/6/2006 - 3:58 PM
Enter Approver Comments, if needed.

[Return to Worklist](#)



Note: The **Confirmation** page displays the names of the approvers and the approval status for each route. If all Lines (in each Route) have “Approved” next to them in green, the requisition has completed the approval process and will be sourced to a PO by the system in a batch process.

Step 11. Click the [View Comments](#) link to view approval comments.



Note: The **View Comments** link drops the screen down to the Approver comments section. This section displays the User ID, Date, and Time for which the comment was made.

Step 12. Scroll down to the bottom of the **Confirmation** page.

Step 13. Click the **Return to Worklist** link located at the bottom left.

The **Worklist** reopens.

Re-approve a Requisition after a Change

Once a requisition has been approved in workflow, the requester can still edit the requisition and resubmit it to workflow for approval. When a change is made, such as deleting an item or increasing the budget amount, the requester must resubmit the requisition to workflow. The re-approval process follows the same steps as Approving a Requisition (One Approver) or Approving a Requisition (Multiple Approvers). The requisition will re-appear in the Approver's worklist. For specific examples of how to make changes, please see the eProcurement for End Users Training Guide in your department.