

# Approving a Requisition

## Introduction

The approval process for NC eProcurement allows the appropriate personnel to approve, edit, or deny items that have been requested in NC eProcurement. Each Requisition must be fully approved within NC eProcurement before the Purchase Order is generated and sent to the supplier. The approval flow for each user may differ based on the users management level, supervisor chain, and entity. Approvers may set their NC eProcurement email preferences to receive an email notification each time a requisition is sent to them for approval. The requests will appear in Your Approvals even if the approver elects not to receive the notification. For more information regarding email notifications, please refer to Section 6: Edit Email Notification Preferences in the **Getting Started** job aid. Notifications or approval requests will also appear on the bell icon in the upper right of the screen in Guided Buying.

The Approval process can be completed in both Guided Buying and Expert view. This job aid will cover the Approval process in the Guided Buying view in sections 1 through 4, then cover the same process and any differences in Expert View in sections 5 through 7.



## Learning Objectives

At the end of this job aid, **you will be able to:**



Approve a Requisition in Guided Buying.



Approve a Requisition in Expert View.



Deny requisitions in Guided Buying and Expert View.

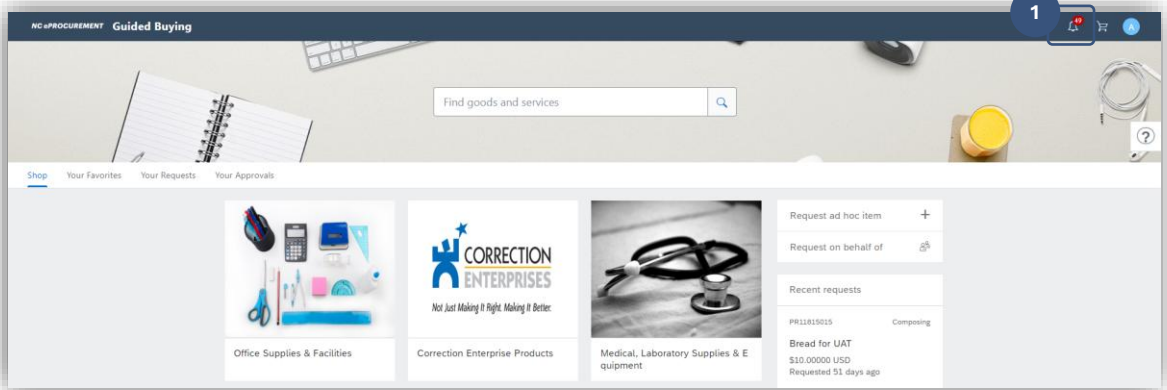
# Approving a Requisition

## Navigating to Your Approvables in Guided Buying

- 1 When logging in to NC eProcurement, users will be brought to the Guided Buying landing page. To see items currently waiting for approval, select **Your Approvals** at the top of the page.



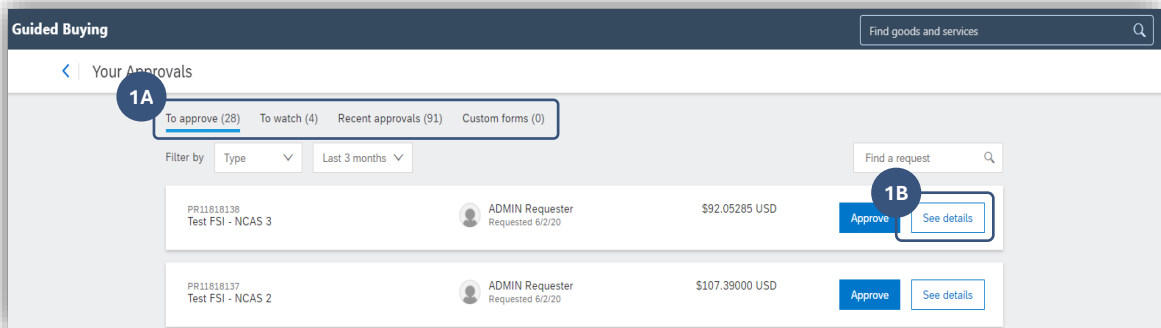
Users without the ability to create Requisitions may go straight to **Your Approvals**.



- A. On the top of the Your Approvals page, there are 4 different sections, with the total number of remaining requests in each section displayed next to the name:

- **To approve** will show all PRs currently waiting for active approval by the user.
- **To watch** contains PRs that the user has been designated as a watcher on the approval flow.
- **Recent approvals** contains items recently approved by the user.
- **Custom forms** is for Security Administrator use and will remain empty for most users.

- B. Approval requests will be sorted by newest first, with the requisition number, Title, Requester, and Total Amount listed. Click the **See details** button to see the selected requisition summary page with more details.



# Approving a Requisition

## Approving a Requisition – Guided Buying

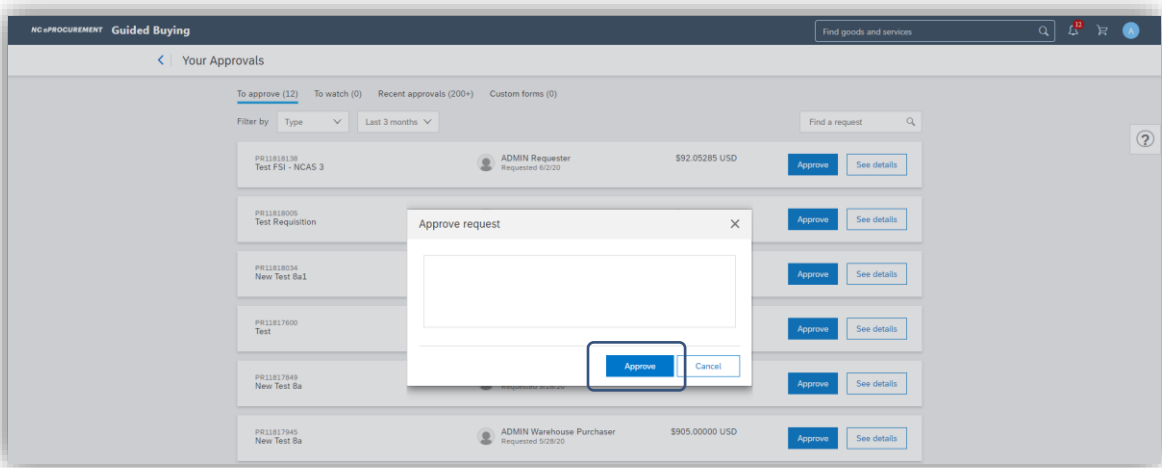
2

Once a Requisition is submitted for approval, the approvers have the option to either approve the request or to deny it. A user may approve a requisition only if the approver is listed as the active required approver in the approval flow of the request.

A. Requisitions that are waiting to be reviewed will appear on the **Your Approvals** page under the **To approve** tab. Select **See details** to review the requisition.



If the **Approve** button is selected instead of **See details**, a pop-up box will appear with space to leave a comment if needed/desired on the and the option to **Approve** or **Cancel**. If the request is approved, then it will immediately move to the next person in the approval flow without showing any further details.



B. Once on the requisition Summary page, review the details for the requisition.

- When approving requisitions, the Approval Flow and Comments sections will appear first. Scroll down the page to see more about the items or services being requested.
- Line item information can be found by selecting the arrows on the left side to expand each section as needed.



Users with the necessary permission can also edit the request during the approval process. This includes updating line items and adding comments and attachments. For more details regarding this process in Guided Buying, reference Section 4: Editing a Requisition as an Approver.

# Approving a Requisition

C. Click the **Approve** button if the details of the order are correct.

The screenshot shows the 'Submitted' status of a requisition. At the top right, there are buttons for 'Approve', 'Deny', and 'Edit'. A callout box labeled '2C' points to the 'Approve' button. Below the buttons is an 'Approval Flow' diagram with six steps: Request, NC Budget Integratio..., ADMIN Supervisor, ADMIN Budget Approver, ADMIN Purchasing Agen..., and ADMIN Chief Procureme... The 'ADMIN Budget Approver' step is currently active. Below the flow is a 'Comments' section with a text input field and a 'Share with supplier' checkbox. There is also an 'Attachments' section with a file upload area. At the bottom, the 'Total Cost' is listed as \$92.05285 USD.

The screenshot shows the details for a requisition item: '4" Patty Press waxed paper dividers, 5,000 per'. The 'Total Cost' is \$117.12000 USD. There are 'Approve' and 'Deny' buttons. A callout box labeled '2B' points to the 'Approve' button. The 'Items (2)' section shows a table with columns for Line Number, Item Name, Quantity, Price, and Net Amount. Below the table, there are sections for 'Supplier Location', 'Supplier Part Number', 'Accounting', 'Shipping', 'Need-by Date', 'Comments', and 'Attachments'. The 'Shipping' section is expanded, showing 'Ship To (A56)' and 'Deliver To' information.

D. Once the user clicks **Approve**, the **Approve request** pop-up will appear. Add any comments as needed/desired and click **Approve** to approve the requisition and send it to the next user in the approval flow or **Cancel** to continue looking over the request.

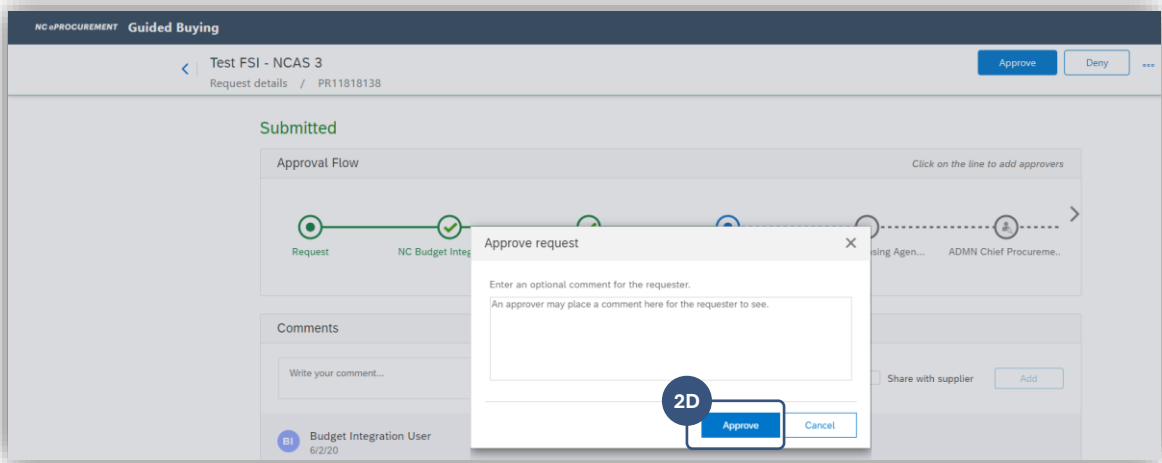
Requisitions that have been recently approved will appear on the **Recent approvals** tab of the **Your Approvals** page.

# Approving a Requisition



**Note for NCFS users:** Once all required approvers have approved the request, the requisition will become a Purchase Order and is automatically sent to the supplier. The status of the requisition and Purchase Order will be **Ordered**.

**Note for Community College, School System, and Non-Integrated users:** Once all required approvers have approved the requisition, the request is then sent to the appropriate financial system (e.g. Sunpac, LINQ, or Colleague) for further processing. The status of the requisition will be **Approved** and will not change until the finished requisition is sent back to NC eProcurement from the financial system, at which point both the requisition and new Purchase Order will move into **Ordered** status.



## Denying a Requisition – Guided Buying

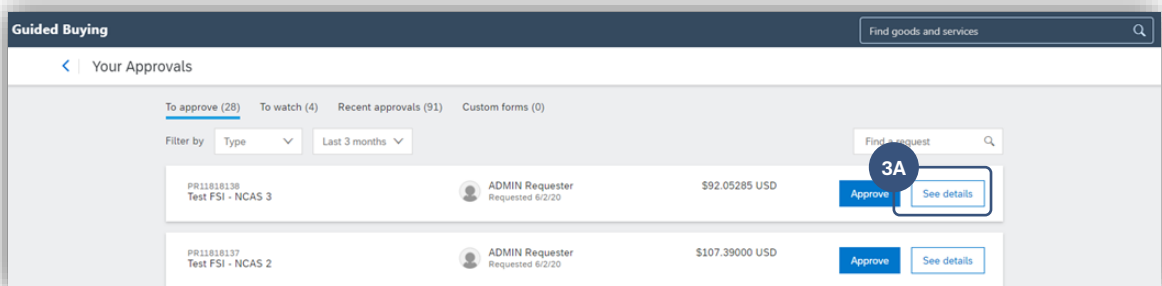
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Once a requisition is submitted for approval, the approvers have the option to either approve the item or to deny it. A user may deny a requisition only if the approver is listed as the active required approver in the approval flow of the request. After a requisition is denied, the status will change from **Submitted** to **Denied**. The original requestor will receive an email notification indicating the requisition has been denied. The requestor must then withdraw the request to make the necessary changes.

**A.** Requisitions that are waiting to be reviewed will appear on the **Your Approvals** page under the **To approve** tab. Select **See details** to review the requisition.




In order to **Deny** an order, the user must select **See details** and go to the requisition Summary page. The **Deny** button will only appear on the Summary page.

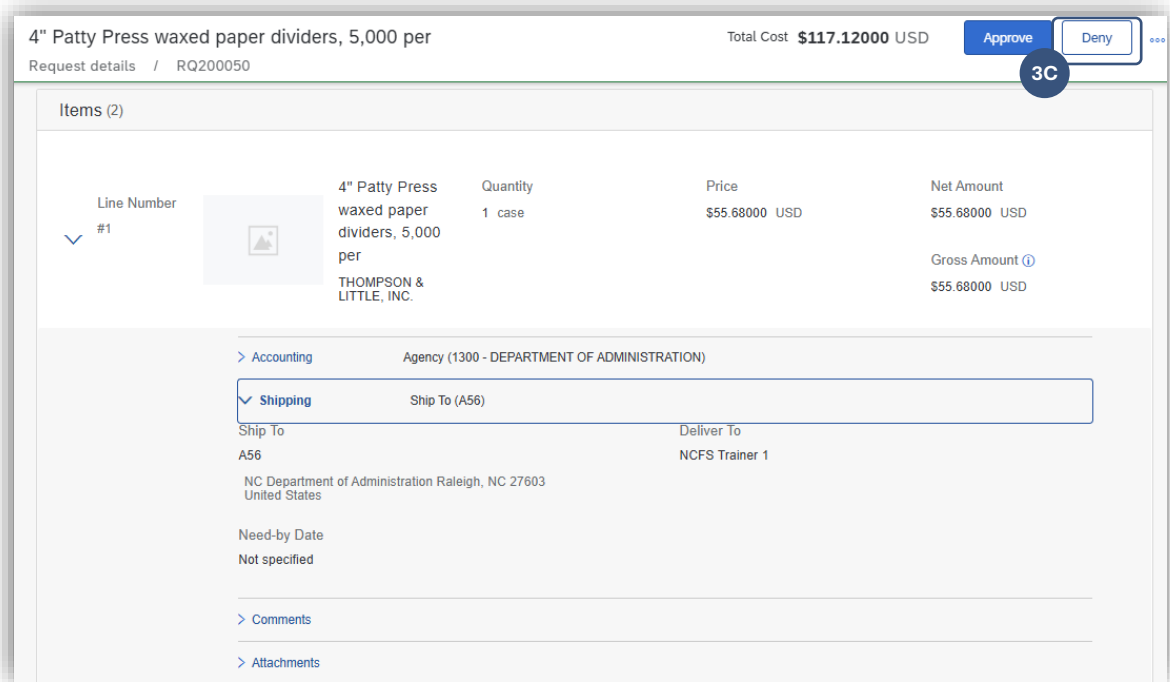


# Approving a Requisition

B. Review the requisition to determine whether it should be approved or denied.


 For information on approving requisitions, please see Section 1 – Approving a Requisition.

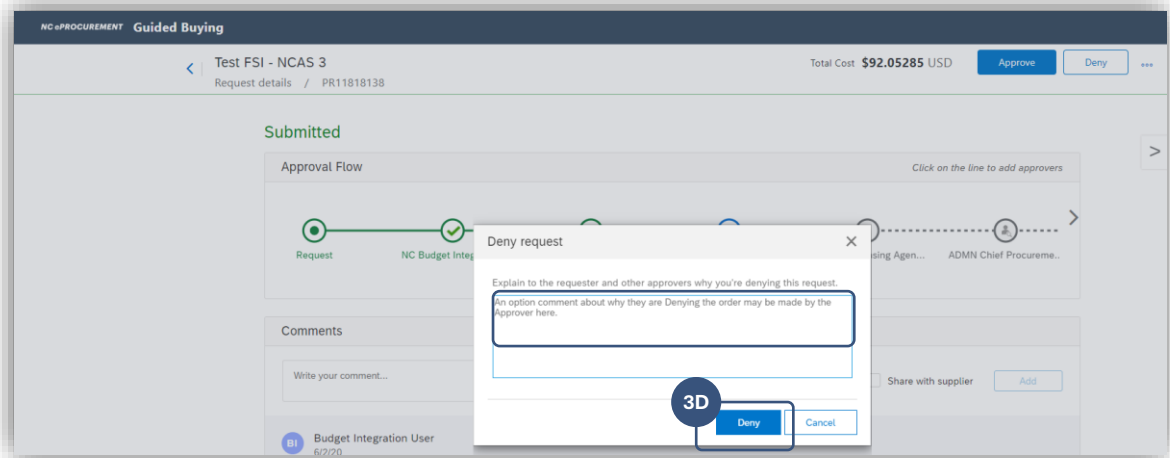
C. If the user determines that the requisition should be denied, click the **Deny** button to deny the request. The requester will then be able to withdraw the order to revise or delete it.



The screenshot shows a requisition item with a total cost of \$117,120.00 USD. The item is '4" Patty Press waxed paper dividers, 5,000 per' with a quantity of 1 case and a price of \$55,680.00 USD. The net amount is \$55,680.00 USD and the gross amount is also \$55,680.00 USD. The supplier is THOMPSON & LITTLE, INC. The accounting agency is 'Agency (1300 - DEPARTMENT OF ADMINISTRATION)'. The shipping information is 'Ship To (A56)' with 'Ship To' as 'A56' and 'Deliver To' as 'NCFS Trainer 1'. The address is 'NC Department of Administration Raleigh, NC 27603 United States'. The need-by date is 'Not specified'. There are buttons for 'Accounting', 'Shipping', 'Comments', and 'Attachments'. A blue 'Approve' button and a grey 'Deny' button are at the top right. A callout bubble with '3C' points to the 'Deny' button.

D. Once the user clicks **Deny**, the **Deny request** pop-up will appear. Add a comment for the requester explaining the reasons for denying the order, and then click **Deny**.

 Requests that have been recently denied will appear in the **Recent approvals** tab on the **Your Approvals** page.



The screenshot shows a 'Deny request' pop-up dialog box. The dialog has a title bar with 'Deny request' and a close button. The main content area contains the text: 'Explain to the requester and other approvers why you're denying this request. An option comment about why they are Denying the order may be made by the Approver here.' Below this text is a text input field. At the bottom of the dialog are 'Deny' and 'Cancel' buttons. A callout bubble with '3D' points to the 'Deny' button. In the background, the requisition page is visible, showing an 'Approval Flow' diagram with a green checkmark on the 'Request' step and a greyed-out 'NC Budget Integration' step. The total cost is \$92,052.85 USD. The page title is 'Test FSI - NCAS 3' and the request ID is 'PR11818138'. The user is 'Budget Integration User'.

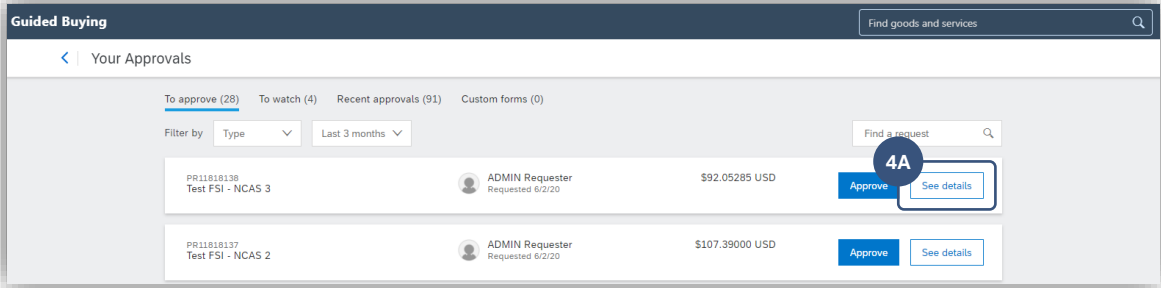
# Approving a Requisition

## Editing a Requisition as an Approver – Guided Buying

4

During the approval process within Ariba, approvers may choose to edit the Requisition to make changes. Approvers will have the ability to make these edits based on whether they were granted the editing role in NC eProcurement. Editing a requisition may require that the requisition be re-approved by the preceding approval flow if both the Edit Threshold or Tolerance is broken by the editor.

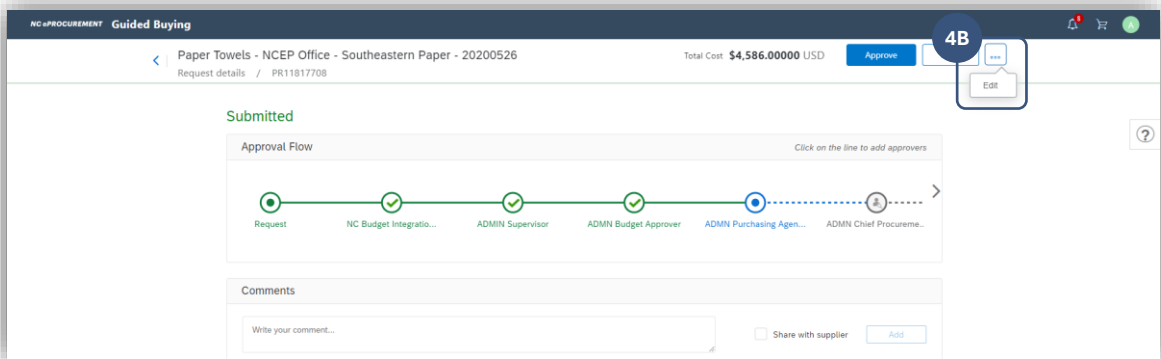
A. Requisitions that are waiting to be reviewed will appear on the **Your Approvals** page under the **To approve** tab. Select **See details** to see the requisition details.



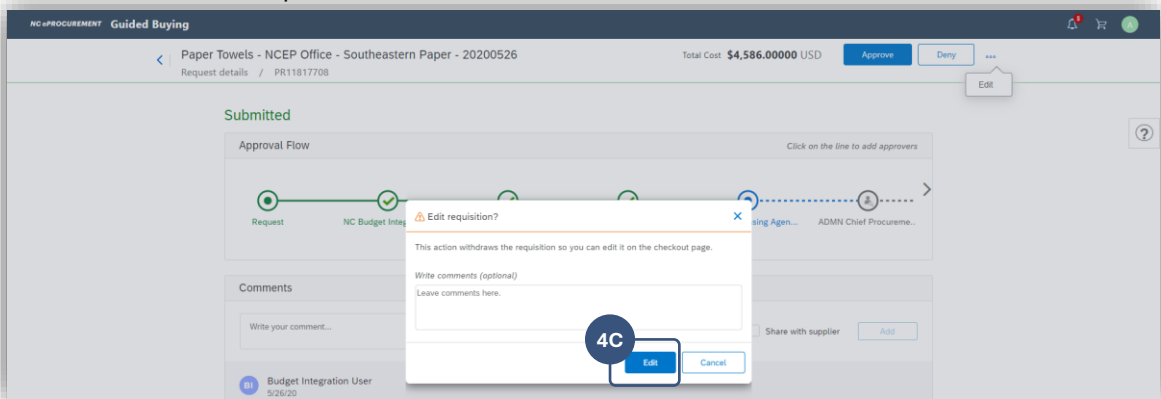
B. If, after reviewing the requisition details, the user determines that the requisition needs to be edited, click the three dots next to the **Deny** button, then click the **Edit** option that appears.



If **Edit** is not appearing, your user profile may not have the Edit role



C. The **Edit requisition?** pop-up will appear to confirm that the user would like to edit the requisition, and doing so will update the requisition to be edited. Click the **Edit** button to confirm that you would like to continue. Clicking **Cancel** will close the pop-up and cancel the Edit process.



# Approving a Requisition

## D. Make the edits to the requisition details.

- Click **Update request** to save changes and send the request back into the approval flow.
- Click **Save and exit** to save a draft of the updated requisition and finish the edits later.



- After making edits to the requisition, the user will still need to approve it.
- If edits are made that exceed the Edit Tolerance and Threshold for your entity, then the requisition may need to be re-approved by the entire approval flow again. Users should contact their Security Administrator for more information on the Thresholds set up for their entity.

Ship to	Charge to	Total cost
NC Department of Administration Raleigh, NC 27603 United States	Agency (1300 - DEPARTMENT OF ADMINISTRATION)	<b>\$117.12000 USD</b>
		Net amount \$117.12000 USD

▼ Show additional details

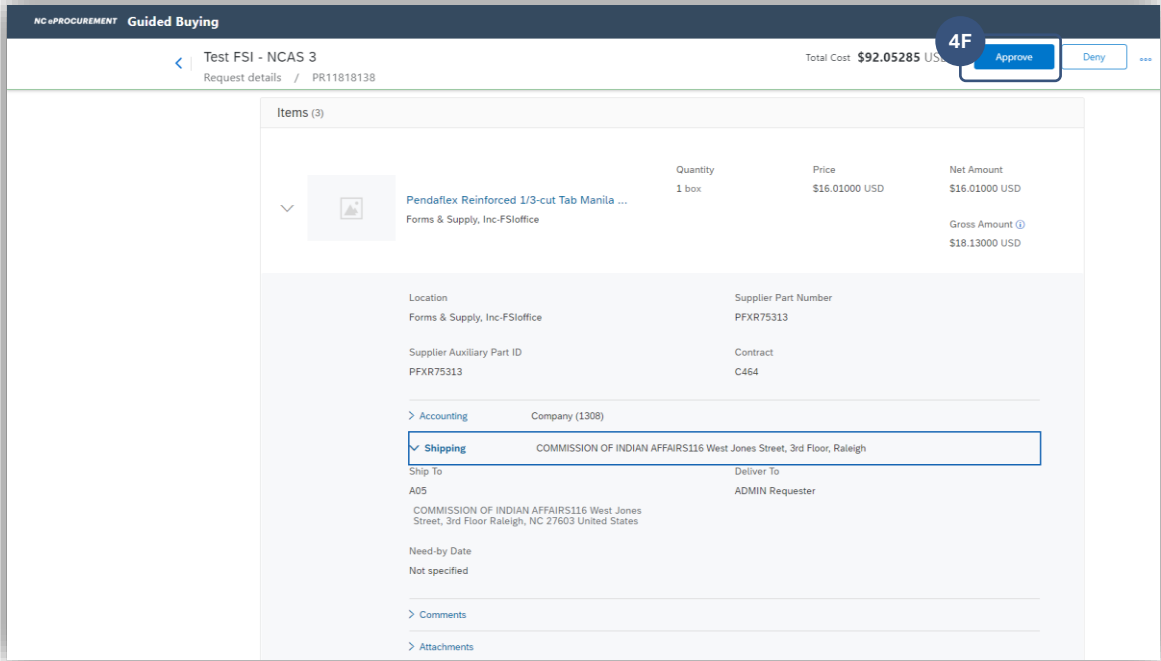
Line Number	Description	Quantity	Price	Net Amount	Gross Amount
#1	4" Patty Press waxed paper dividers, 5,000 per THOMPSON & LITTLE, INC.	1 case	\$55.68000 USD	\$55.68000 USD	\$55.68000 USD
#2	5" Patty Press waxed paper dividers, 5,000 per THOMPSON & LITTLE, INC.	1 case	\$61.44000 USD	\$61.44000 USD	\$61.44000 USD

## E. Click on **View Requisition** on the pop-up that appears to be brought back to the Request Details page.

- The updated requisition will also be on the **Your Approvals** page under the **To approve** tab.

## F. Click the **Approve** button once the requisition is confirmed to be correct.

# Approving a Requisition

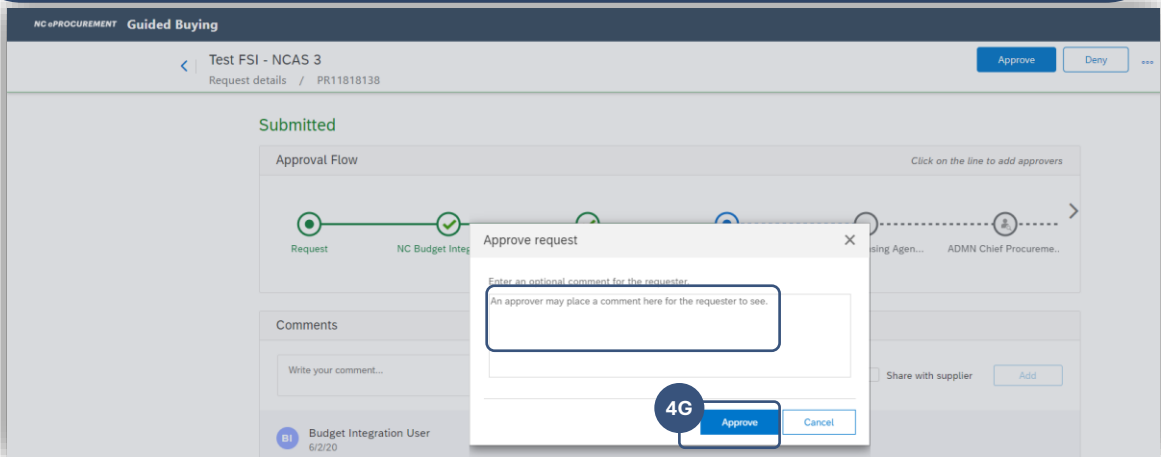


**G.** Once the user clicks **Approve**, the **Approve request** pop-up will appear. Add a comment if needed and click **Approve** to approve the requisition and send it to the next user in the approval flow or **Cancel** to continue looking over the request.

Requisitions that have been recently approved will appear on the **Recent approvals** tab of the **Your Approvals** page.

**Note for NCFS users:** Once all required approvers have approved the request, the requisition will become a Purchase Order and is automatically sent to the supplier. The status of the requisition and Purchase Order will be **Ordered**.

**Note for Community College, School System, and Non-Integrated users:** Once all required approvers have approved the requisition, the request is then sent to the appropriate financial system (e.g. Sunpac, LINQ, or Colleague) for further processing. The status of the requisition will be **Approved** and will not change until the finished requisition is sent back to NC eProcurement from the financial system, at which point both the requisition and new Purchase order will move into **Ordered** status.



# Approving a Requisition

## Finding Approvables in Expert View

5 When using NC eProcurement, users may wish to approve Requisitions while in Expert View

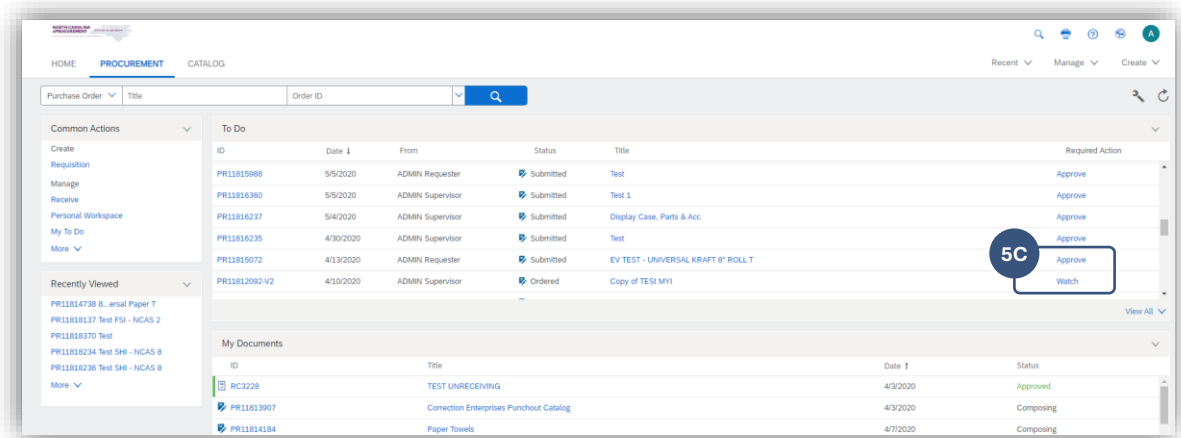
For more information on navigating between Guided Buying and Expert View, please see the **Getting Started** job aid.

A. In Expert View, the user can find requisitions waiting for action in the **To Do** portlet on the **Procurement** tab.

B. The Required Action for each item is on the right side of the portlet.

- **Approve** indicates the user must actively review and approve the requisition.
- **Watch** means the user is a Watcher in the approval flow and may view the requisition details, but approval is not required.

The **To Do** portlet may also appear on the **Home** tab.

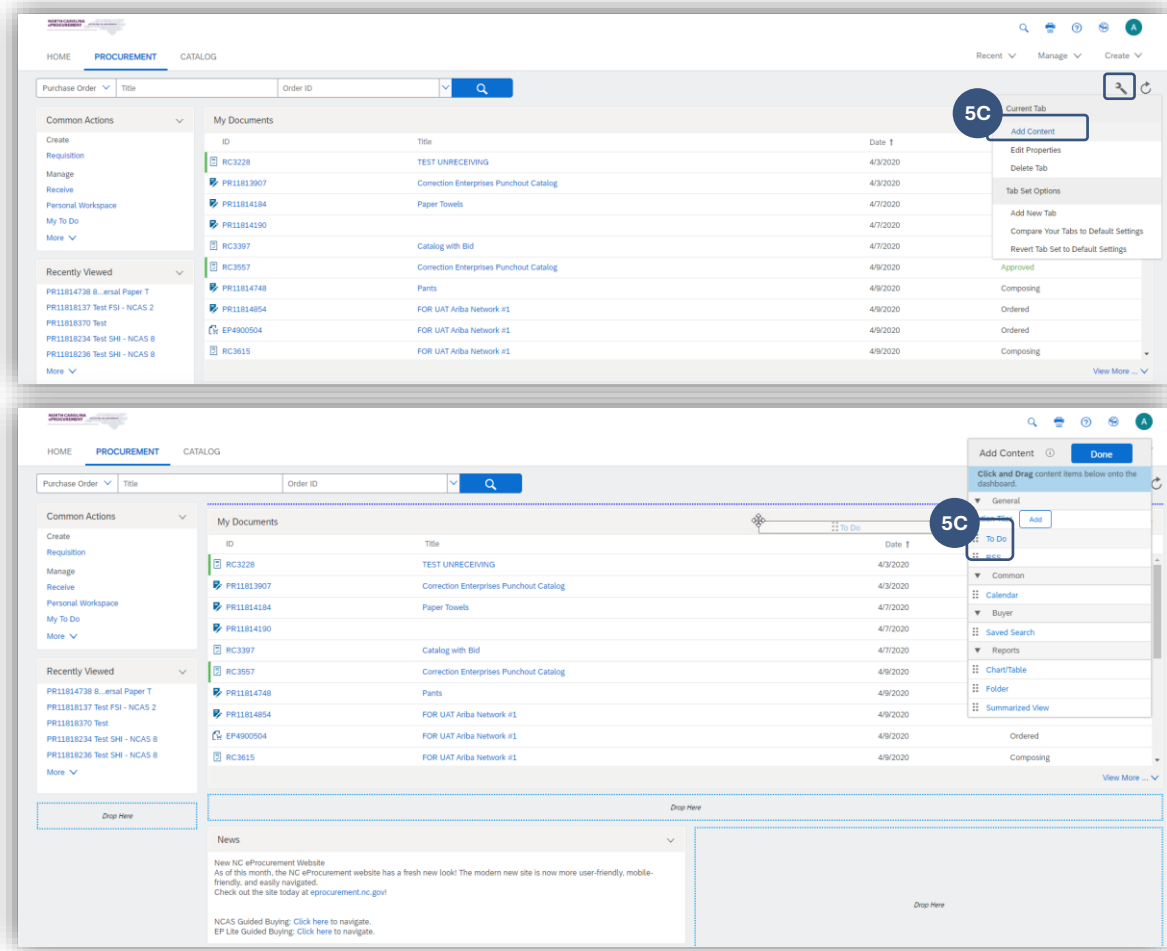


C. If the **To Do** portlet was deleted from the **Home** or **Procurement** tabs, use these steps to add the portlet back to the dashboard:

- Click the wrench on the upper right of the tab, and click **Add Content** from the menu.
- Under the **General** section, locate the **To Do** item, and click and hold down the left mouse button over the portlet item once the arrows appear.
- Drag the **To Do** portlet to the desired location outlined in blue dots on the page.
- Once added back, the system may take a couple minutes to populate the portlet.

If the **To Do** portlet is missing from both tabs and does not appear in the **Add Content** menu, please contact the Help Desk for further assistance.

# Approving a Requisition



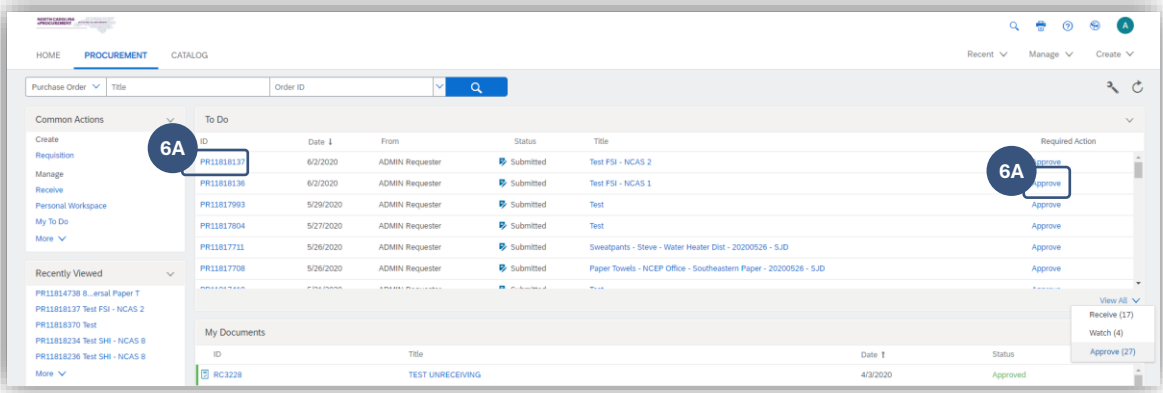
## Approving a Requisition – Expert View

6 The Requisitions that appear in the **To Do** portlet on the **Procurement** tab are approvable that require the action of the user that is currently logged in.

- A. Click on the requisition **ID**, **Title**, or the **Approve** link on the **To Do** portlet.
  - Selecting **ID** or **Title** will bring the user to the requisition Summary page.
  - Clicking **Approve** will bring the user to an abbreviated Summary page, with only the basic line item details such as Line Item Description, Quantity, Price, and Total Amount visible. The Approval Flow will also be displayed. To view additional requisition details before approving, the user should select the **ID** or **Title** on the **To Do** portlet instead.
  - Users may also search the system for the requisition number to approve awaiting requests.

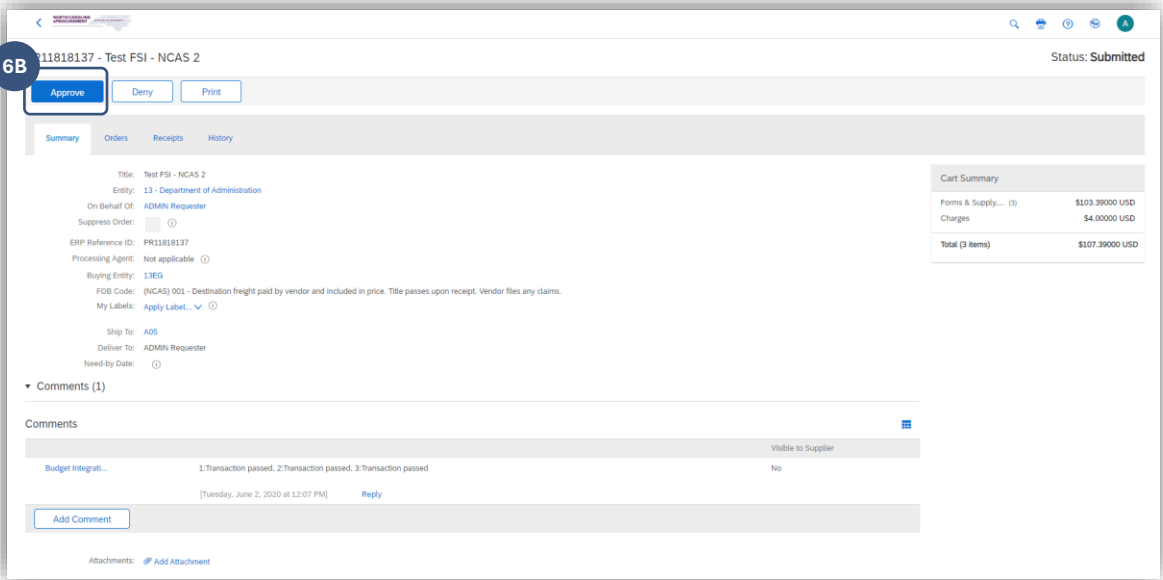
The **View All** link in the bottom right of the **To Do** portlet will display the number of requisitions awaiting action, organized by category

# Approving a Requisition

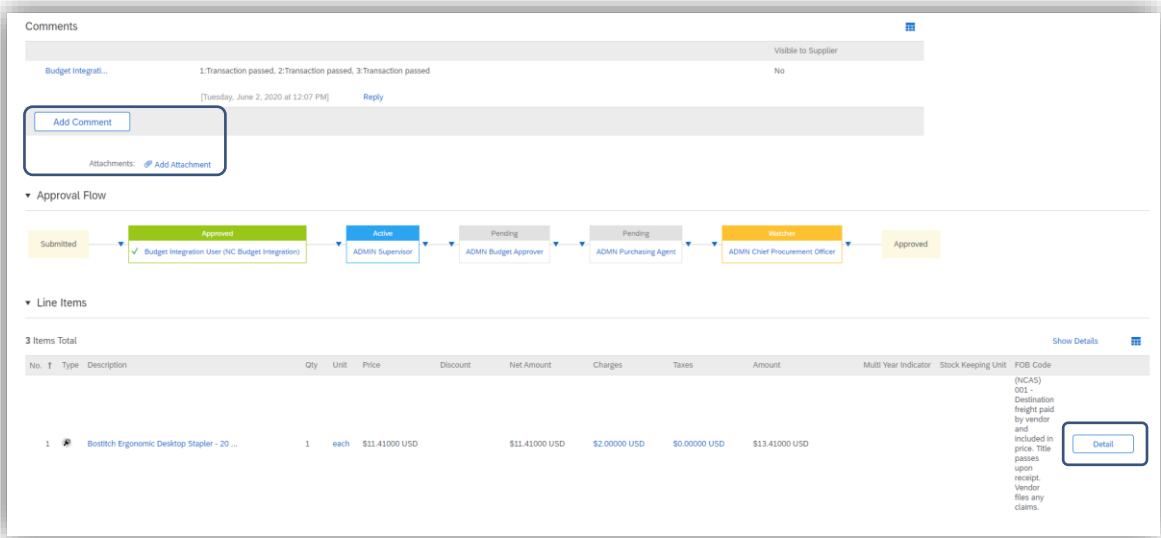


**B.** Review the requisition details and click the **Approve** button if the requisition is correct.

- Users with the necessary permissions can also edit the requisition during the approval process. This includes updating line items and adding comments and attachments. For more details regarding this process in Expert View, reference Section 8: Editing a Requisition as an Approver.
- The approval flow for a requisition is now found on the Summary page, above the Line Items section.



# Approving a Requisition



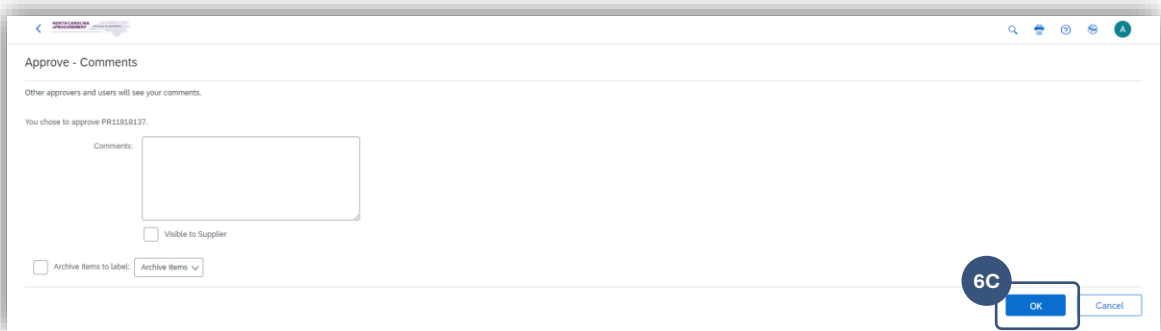
C. Once the user clicks **Approve**, the **Approve - Comments** page will appear. Add any necessary comments and click **OK**.



Requisitions are automatically moved to the Archive label after being approved unless another label is selected. To change the label to which the item is assigned, use the dropdown box beside **Archive items to label** and choose the appropriate label. For more information about Labels, reference the **Personal Labels** job aid.

**Note for NCFS users:** Once all required approvers have approved the request, the requisition will become a Purchase Order and is automatically sent to the supplier. The status of the requisition and Purchase Order will be **Ordered**.

**Note for Community College, School System, and Non-Integrated users:** Once all required approvers have approved the requisition, the request is then sent to the appropriate financial system (e.g. Sunpac, LINQ, or Colleague) for further processing. The status of the requisition will be **Approved** and will not change until the finished requisition is sent back to NC eProcurement from the financial system, at which point both the requisition and new Purchase order will move into **Ordered** status.



# Approving a Requisition

## Denying a Requisition – Expert View

7 Once a Requisition is submitted for approval, the approvers have the option to either approve the requisition or to deny it. A user may deny a requisition only if the approver is listed as the active required approver in the approval flow of the request. After a requisition is denied, the status will change from **Submitted** to **Denied**. The original requestor will receive an email notification indicating the requisition has been denied and must withdraw the request to make the necessary changes. The items that appear in the **To Do** portlet on the **Procurement** tab are approvables that require the action of the user that is currently logged in. The required action is displayed on the right side of the portlet.

- A. Click on the requisition **ID**, **Title**, or the **Approve** link on the **To Do** portlet.
- Selecting **ID** or **Title** will bring the user to the requisition Summary page.
  - Clicking **Approve** will bring the user to an abbreviated Summary page, with only the basic line item details such as Line Item Description, Quantity, Price, and Total Amount visible. The Approval Flow will also be displayed. To view additional requisition details before approving, the user should select the **ID** or **Title** on the **To Do** portlet instead.
  - Users may also search the system for the requisition number to approve awaiting requests.

The **View List** link in the bottom right of the **To Do** portlet will display the number of requisitions awaiting action, organized by category.

ID	Date	From	Status	Title	Required Action
PR11818137	6/2/2020	ADMIN Requester	Submitted	Test FSI - NCAS 2	Approve
PR11818136	6/2/2020	ADMIN Requester	Submitted	Test FSI - NCAS 1	Approve
PR11817993	5/29/2020	ADMIN Requester	Submitted	Test	Approve
PR11817804	5/27/2020	ADMIN Requester	Submitted	Test	Approve
PR11817711	5/26/2020	ADMIN Requester	Submitted	Sweatpants - Stone - Water Heater Dist - 20200526 - SJD	Approve
PR11817708	5/26/2020	ADMIN Requester	Submitted	Paper Towels - NCEP Office - Southeastern Paper - 20200526 - SJD	Approve

B. Review the requisition to determine if it should be approved or denied.

For information on approving requisitions, see Section 6: Approving a Requisition.

C. If the approver determines that the requisition should be denied, click the **Deny** button to deny the request and return it to the original requestor

A user who is designated as a **Watcher** in the approval flow will not have the option to deny the requisition.

# Approving a Requisition

**PR11818** Test FSI - NCAS 2 Status: Submitted

**7C** Deny Print

**Summary** Orders Receipts History

Title: Test FSI - NCAS 2  
 Entity: 13 - Department of Administration  
 On Behalf Of: ADMIN Requester  
 Suppress Order:   
 ERP Reference ID: PR11818137  
 Processing Agent: Not applicable  
 Buying Entity: 13ES  
 FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.  
 My Labels: Apply Label...  
 Ship To: A05  
 Deliver To: ADMIN Requester  
 Need-by Date:

**Cart Summary**

Forms & Supply...	\$103.39000 USD
Charges	\$4.00000 USD
<b>Total (3 items)</b>	<b>\$107.39000 USD</b>

**Comments (1)**

**Comments**

Comment	Visible to Supplier
Budget Integrati... 1:Transaction passed, 2:Transaction passed, 3:Transaction passed [Tuesday, June 2, 2020 at 12:07 PM] <span>Reply</span>	No

Add Comment

Attachments: Add Attachment

**Approval Flow**

```

graph LR
    Submitted --> Approved[Approved]
    Approved --> Active[Active]
    Active --> Pending1[Pending]
    Pending1 --> Pending2[Pending]
    Pending2 --> Watcher[Watcher]
    Watcher --> Approved2[Approved]
  
```

**Line Items**

3 Items Total

No.	Type	Description	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes	Amount	Multi Year Indicator	Stock Keeping Unit	FOB Code
1		Bostitch Ergonomic Desktop Stapler - 20 ...	1	each	\$11.41000 USD		\$11.41000 USD	\$2.00000 USD	\$0.00000 USD	\$13.41000 USD			(NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.

Detail

**D.** the user clicks **Deny**, the **Deny - Comments** page will appear. Add a comment about why the order was denied and click **OK**.

Requisitions are automatically moved to the Archive label after being denied unless another label is selected. To change the label to which the item is assigned, use the dropdown box beside **Archive items to label** and choose the appropriate label. For more information about Labels, reference the **Personal Labels** job aid.

**Deny - Comments**

Explain why you denied this request. Other users will see your comments.

You chose to deny PR11818137.

Comments: Add a comment here to explain the reason for Denying the order, moving the status from 'Submitted' to 'Denied'.

Visible to Supplier

Archive items to label: Archive Items

**7D** OK Cancel

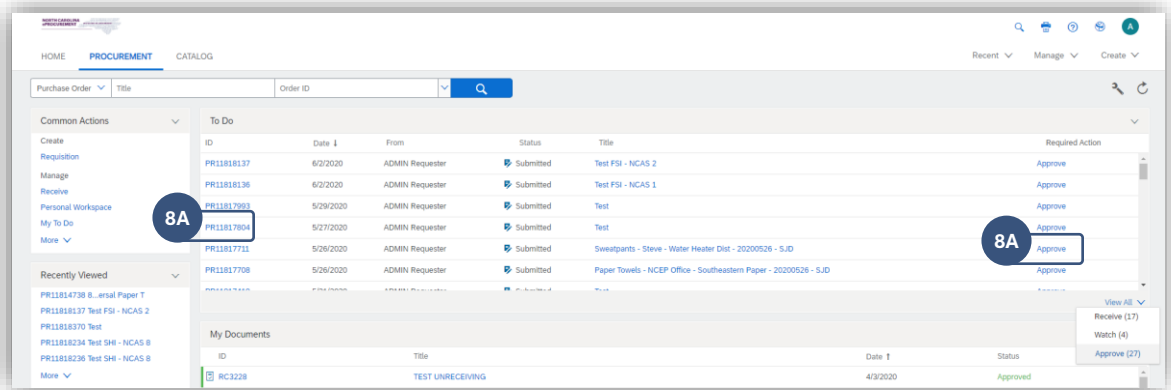
# Approving a Requisition

## Editing a Requisition as an Approver – Expert View

8 During the approval process within Ariba, approvers may choose to edit the Requisition to make changes. Approvers will have the ability to make these edits based on whether they were granted the editing role in NC eProcurement. Editing a requisition may require that the requisition be re-approved by the preceding approval flow if both the Edit Threshold or Tolerance is broken by the editor.

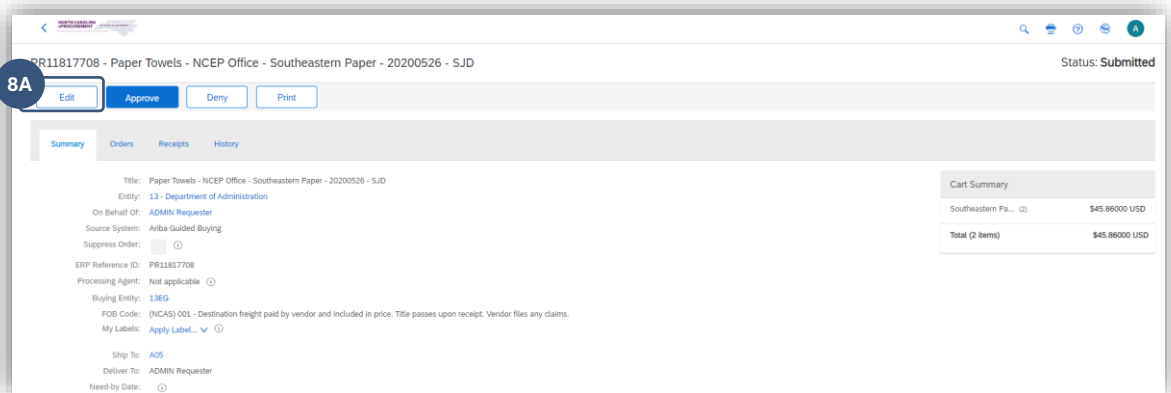
A. Click on the requisition **ID**, **Title**, or the **Approve** link on the **To Do** portlet.

Clicking **Approve** will bring the user to an abbreviated Summary page, with only the basic line item details such as Line Item Description, Quantity, Price, and Total Amount visible. The Approval Flow will also be displayed. For more requisition details, the user should select the **ID** or **Title** on the **To Do** portlet instead.



B. Click the **Edit** button that appears next to **Approve** and **Deny** on either the requisition Summary or Approving pages

If **Edit** is not appearing, your user profile may not have the Edit role



C. Make edits to the requisition. Line items may be updated by checking the box next to the appropriate line number and clicking **Edit Details** from the **Actions** drop-down menu.

D. Click **Save** to save the updates made to the requisition.

# Approving a Requisition

**B.** Users will be taken back to the Summary page for the requisition, where they'll be able to approve the newly updated requisition.

If edits are made that exceed the Edit Threshold and Tolerance for your entity the below warning screen will appear, and the requisition may need to be sent through the approval flow for re-approval. Users should contact their Security Administrator for more information on the Thresholds set up for their entity.

**C.** Once the user clicks **Approve**, the **Approve - Comments** page will appear. Add any necessary comments and click **OK**.

Requisitions are automatically moved to the Archive label after being approved unless another label is selected. To change the label to which the item is assigned, use the dropdown box beside **Archive items to label** and choose the appropriate label. For more information about Labels, reference the **Personal Labels** job aid.

**Note for NCFS users:** Once all required approvers have approved the request, the requisition will become a Purchase Order and is automatically sent to the supplier. The status of the requisition and Purchase Order will be **Ordered**.

**Note for Community College, School System, and Non-Integrated users:** Once all required approvers have approved the requisition, the request is then sent to the appropriate financial system (e.g. Sunpac, LINQ, or Colleague) for further processing. The status of the requisition will be **Approved** and will not change until the finished requisition is sent back to NC eProcurement from the financial system, at which point both the requisition and new Purchase order will move into **Ordered** status.