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 1through 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**:

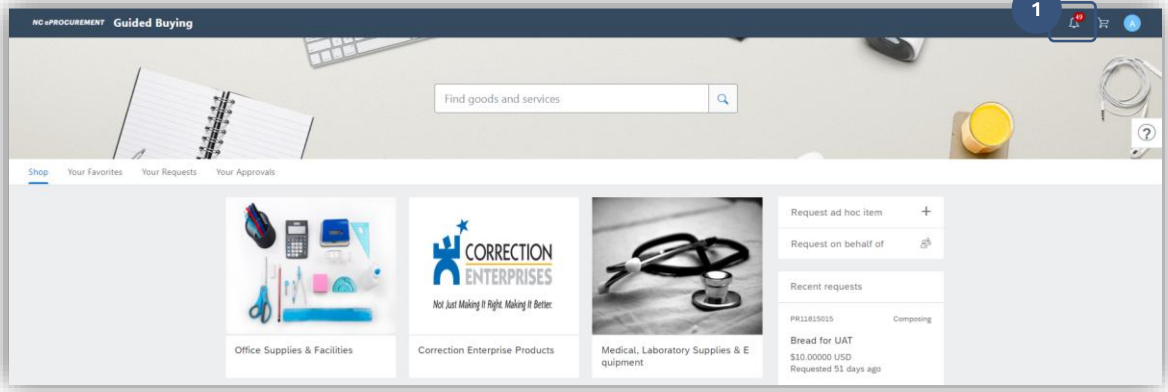
- Approve a Requisition in Guided Buying.
- Approve a Requisition in Expert View.
- Deny requisitions in Guided Buying and Expert View.

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.

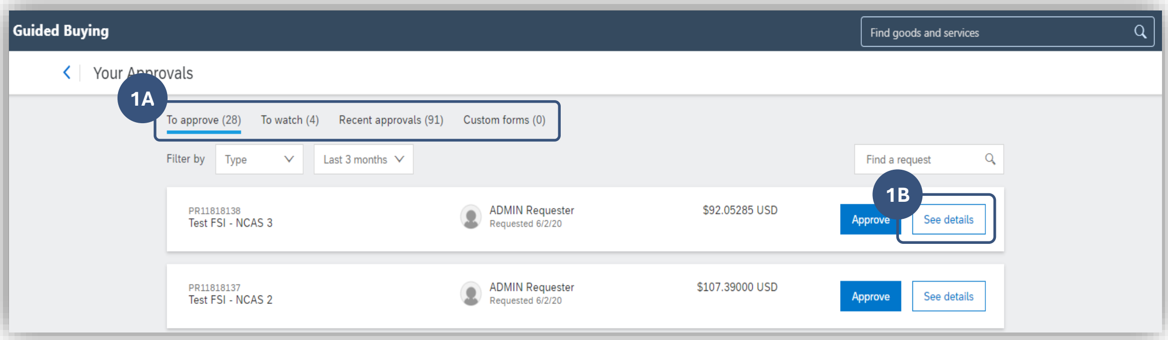
Users without the ability to create Requisitions may go straight to **Your Approvals**.



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.



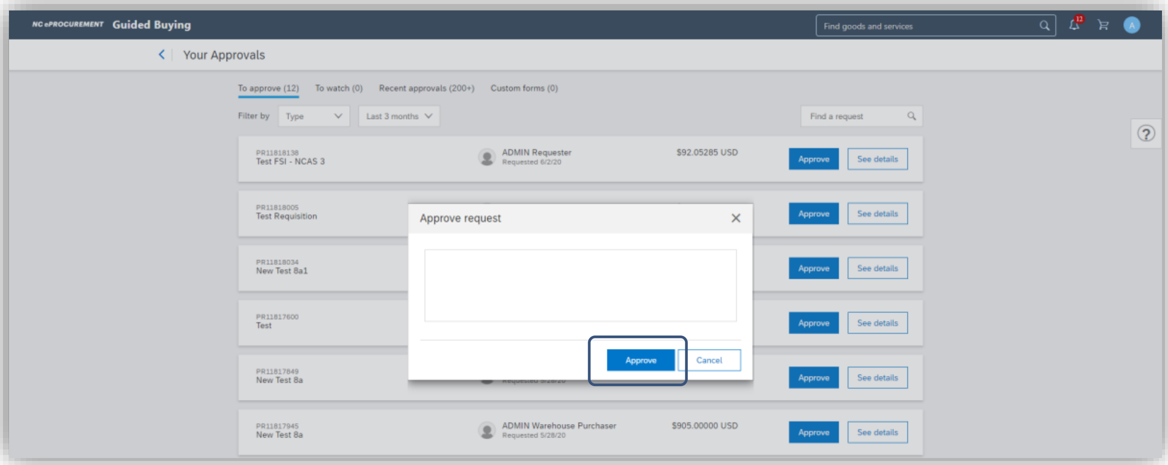
Approving a Requisition

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 requsition.

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.



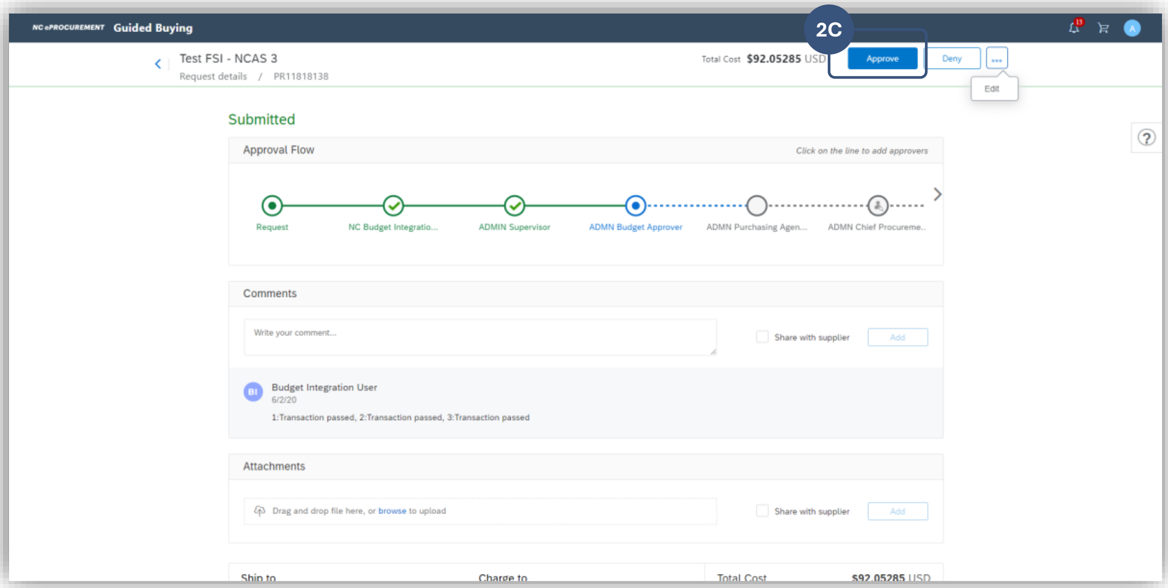
B. Once on the requisition Summary page, review the details for the requisition.

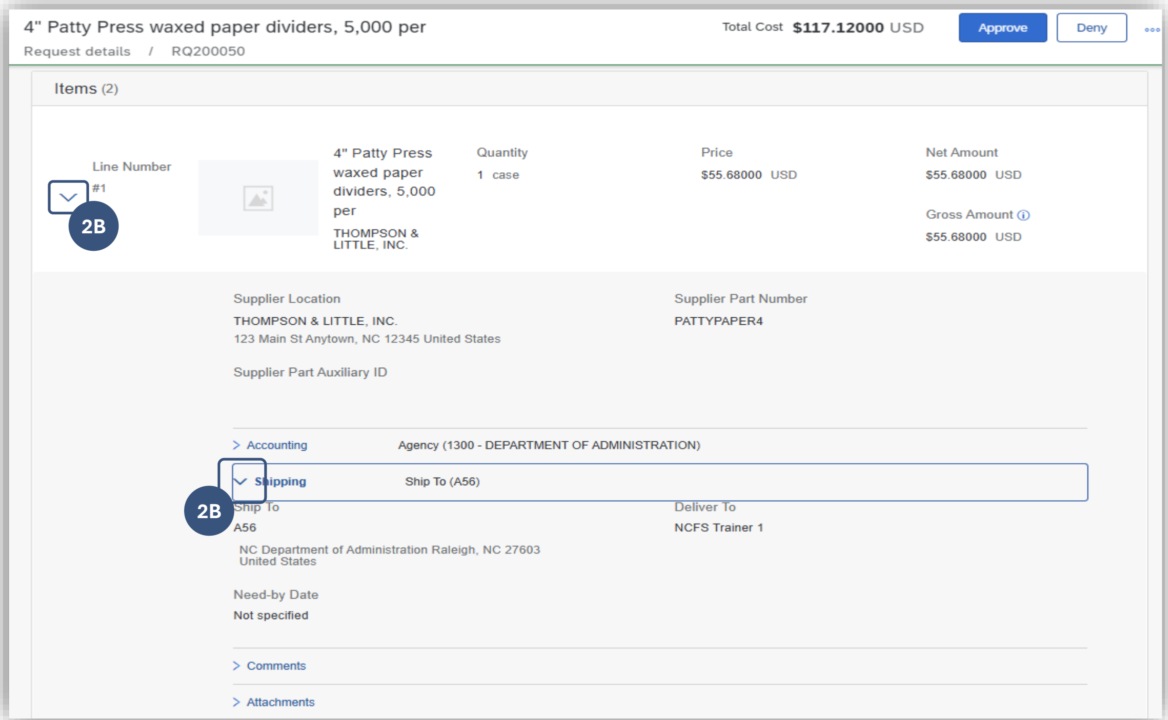
- When approving requisitions, the Approval Flow and Comments sections will appear first. Scroll down the page to see more about the items or services being requested.
- Line item information can be found by selecting the arrows on the left side to expand each section as needed.

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.





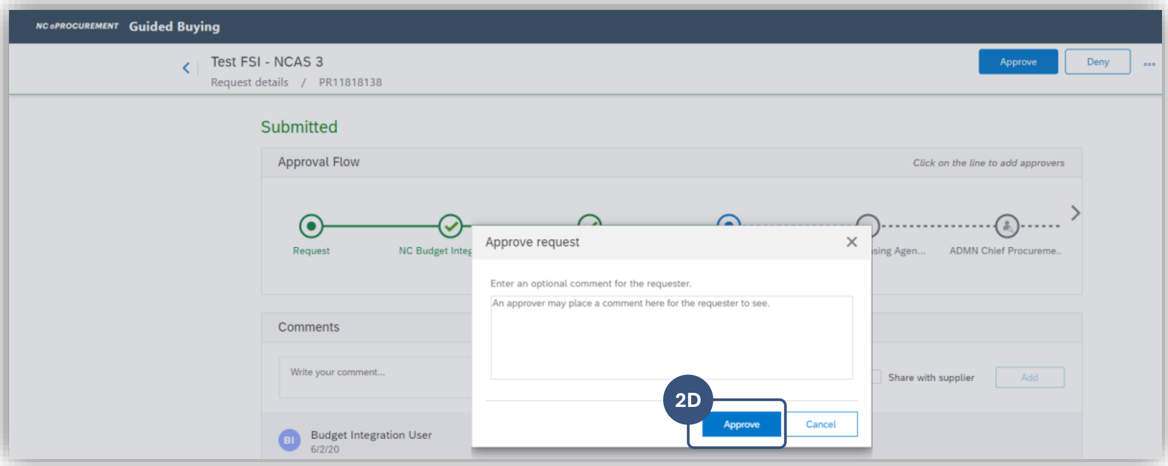
D. Once the user clicks **Approve**, the **Approve request** pop-up will appear. Add any comments as needed/desired and click **Approve** to approve the requisition and send it to the next user in the approval flow or **Cancel** to continue looking over the request.

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.

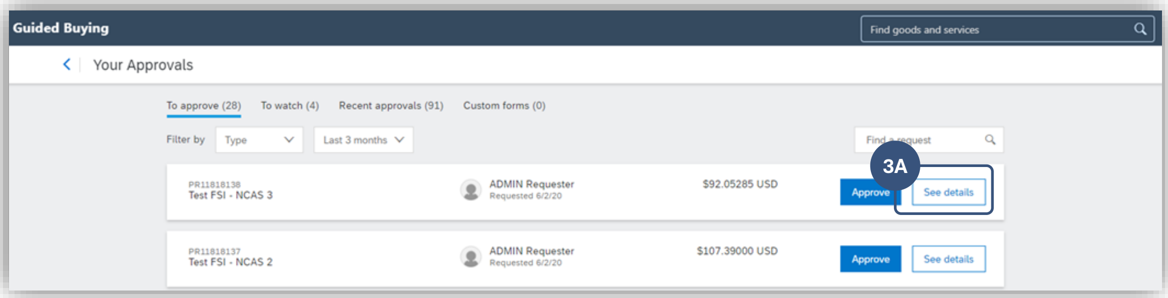


Denying a Requisition – Guided Buying

3 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 requester 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.

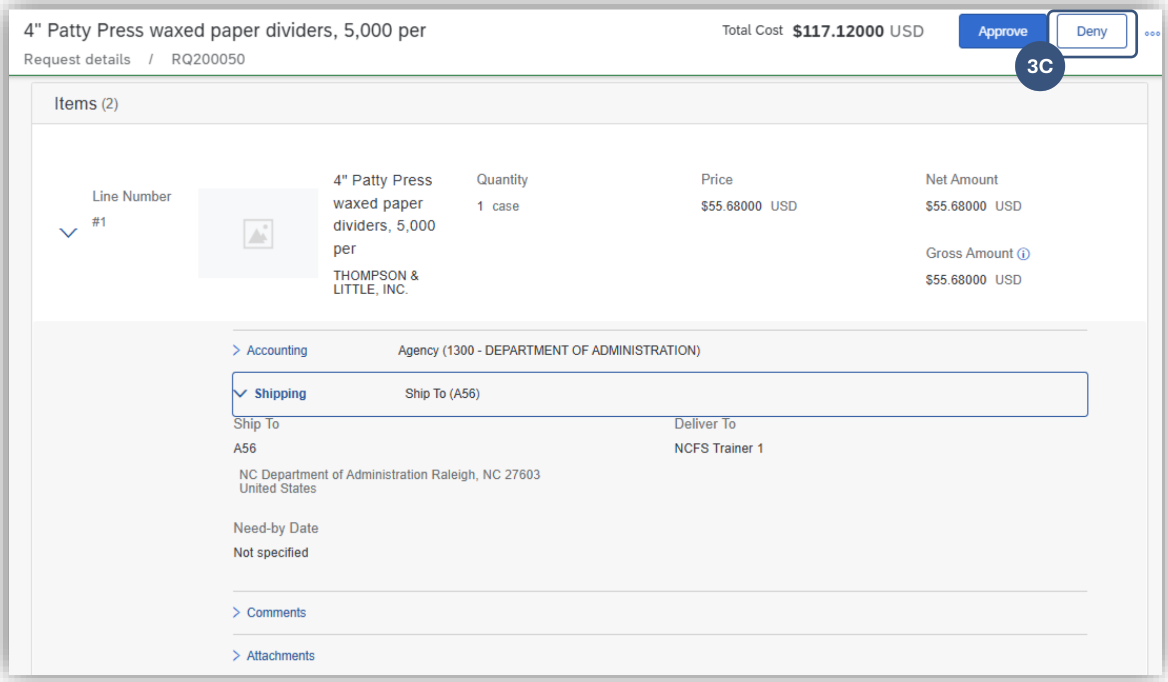


Approving a Requisition

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

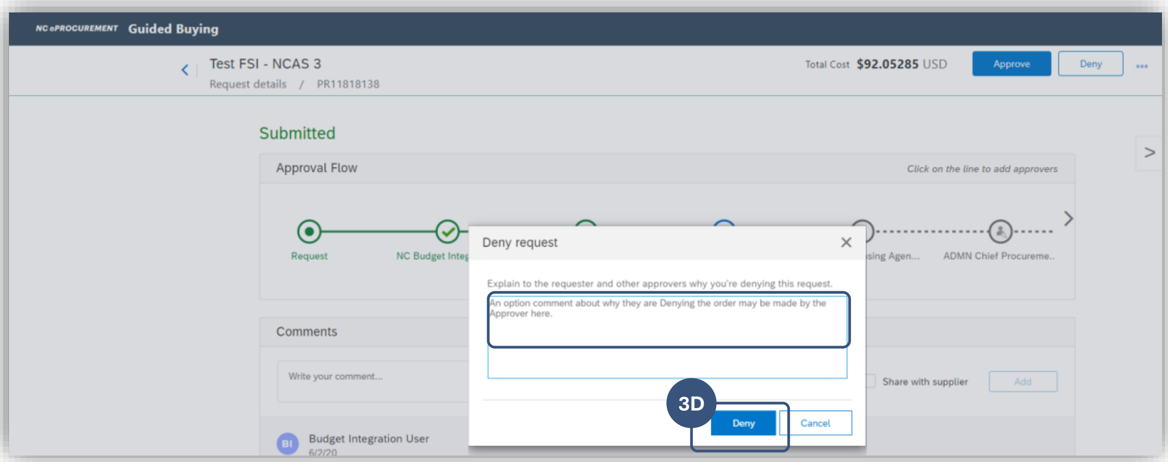
For information on approving requisitions, please see Section 1 – Approving a Requisition.

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.



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**.

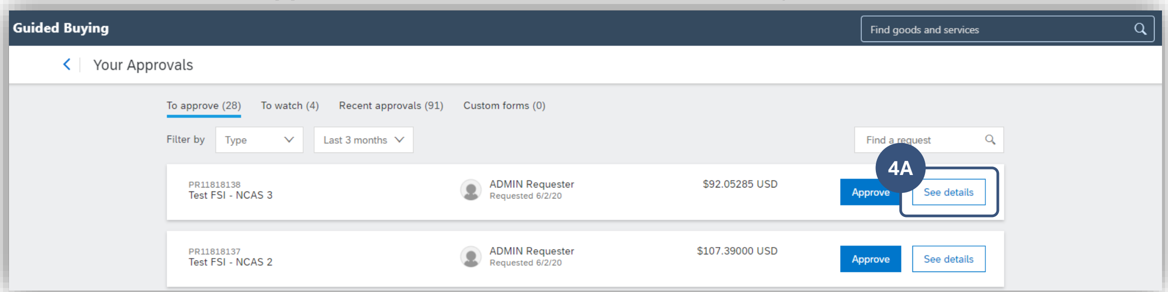
Requests that have been recently denied will appear in the **Recent approvals** tab on the **Your Approvals** page.



Editing a Requisition as an Approver – Guided Buying

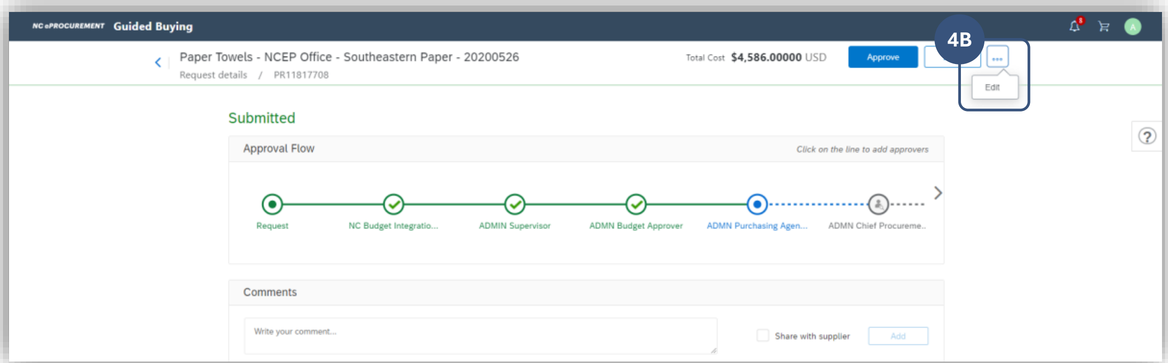
4 During the approval process within Ariba, approvers may choose to edit the Requisition to make changes. Approvers will have the ability to make these edits based on whether they were granted the editing role in NC eProcurement. Editing a requisition may require that the requisition be re-approved by 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.

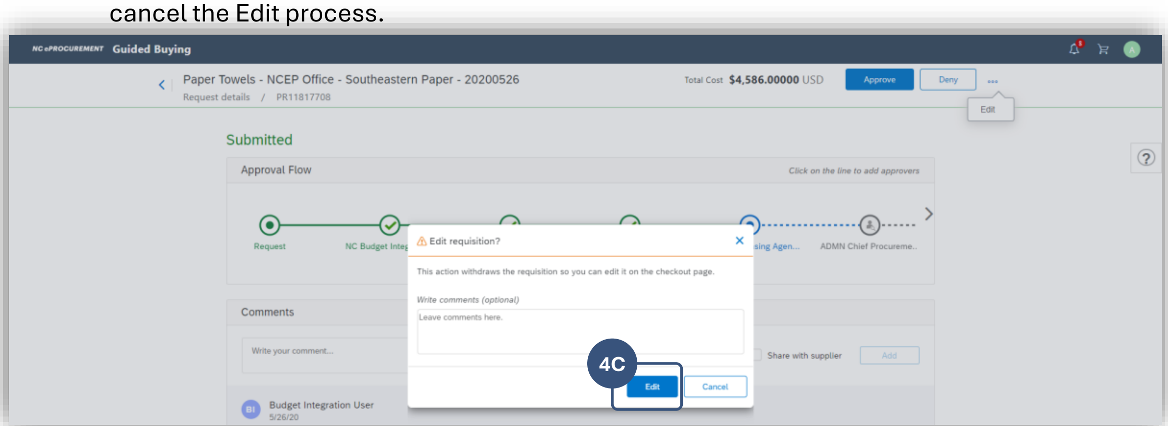


B. If, after reviewing the requisition details, the user determines that the requisition needs to be edited, click the three dots next to the **Deny** button, then click the **Edit** option that appears.

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



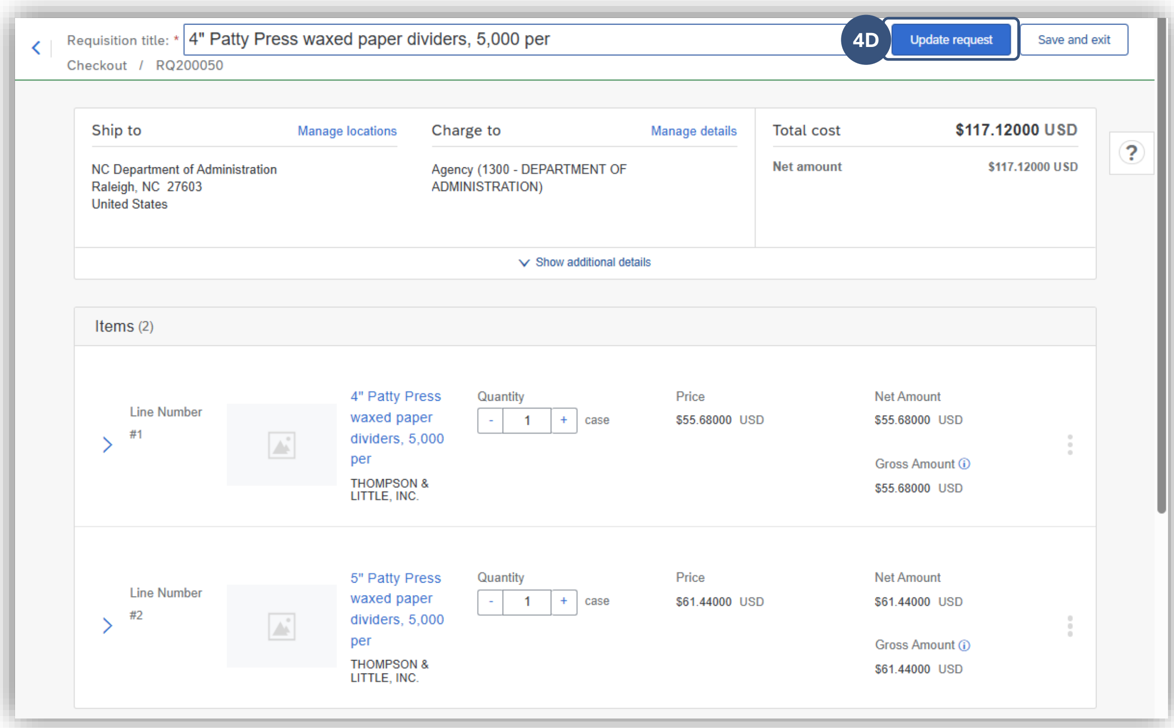
C. The **Edit requisition?** pop-up will appear to confirm that the user would like to edit the requisition, and doing so will update the requisition to be edited. Click the **Edit** button to confirm that you would like to continue. Clicking **Cancel** will close the pop-up and cancel the Edit process.



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.

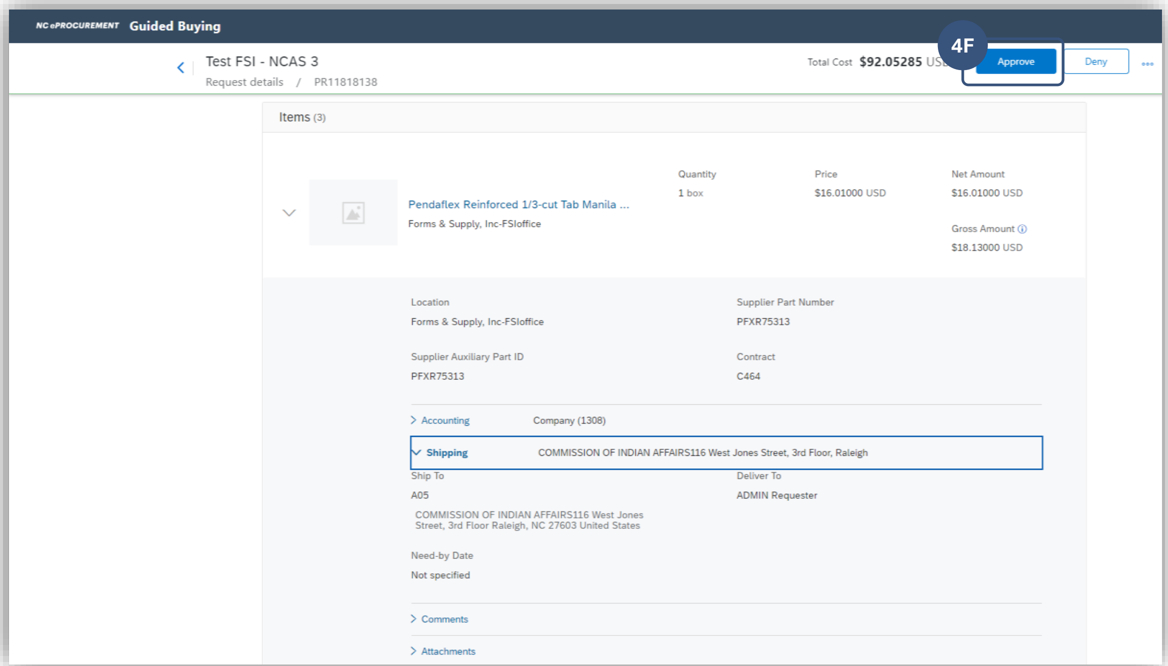
- After making edits to the requisition, the user will still need to approve it.
- If edits are made that exceed the Edit Tolerance and Threshold for your entity, then the requisition may need to be re-approved by the entire approval flow again. Users should contact their Security Administrator for more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



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.

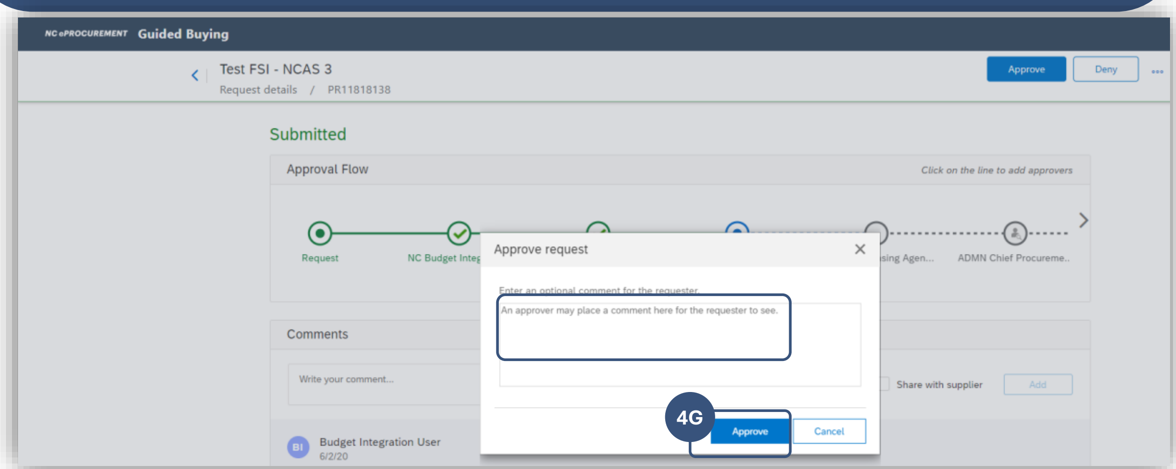


G. Once the user clicks **Approve**, the **Approve request** pop-up will appear. Add a comment if needed and click **Approve** to approve the requisition and send it to the next user in the approval flow or **Cancel** to continue looking over the request.

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 Purchas 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

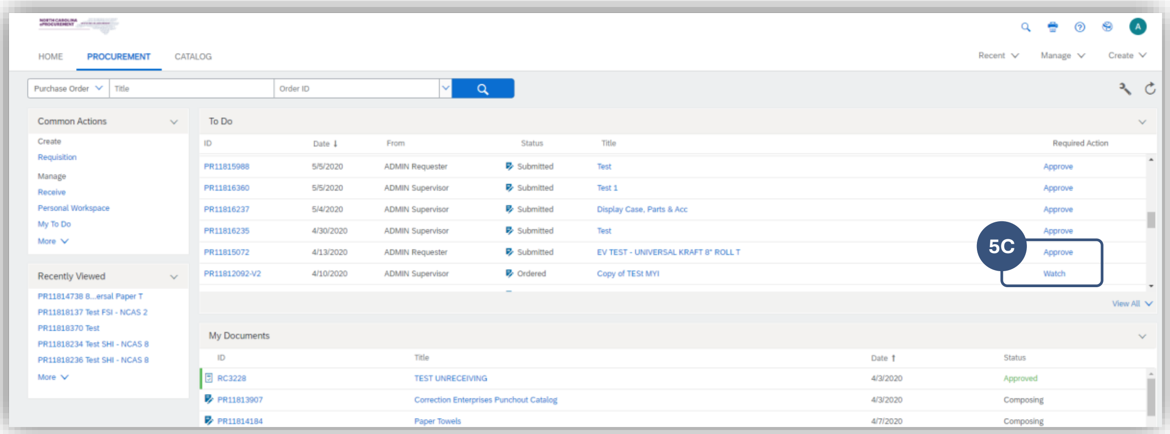
For more information on navigating between Guided Buying and Expert View, please see the **Getting Started** job aid.

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.

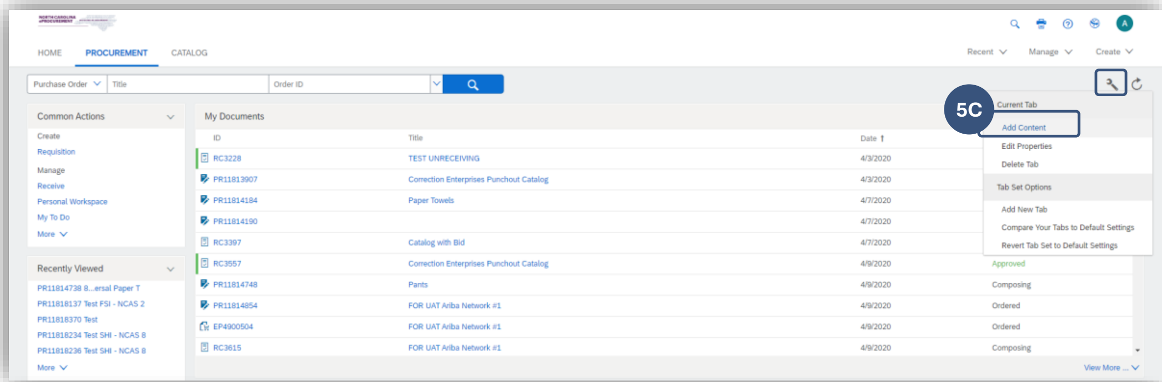


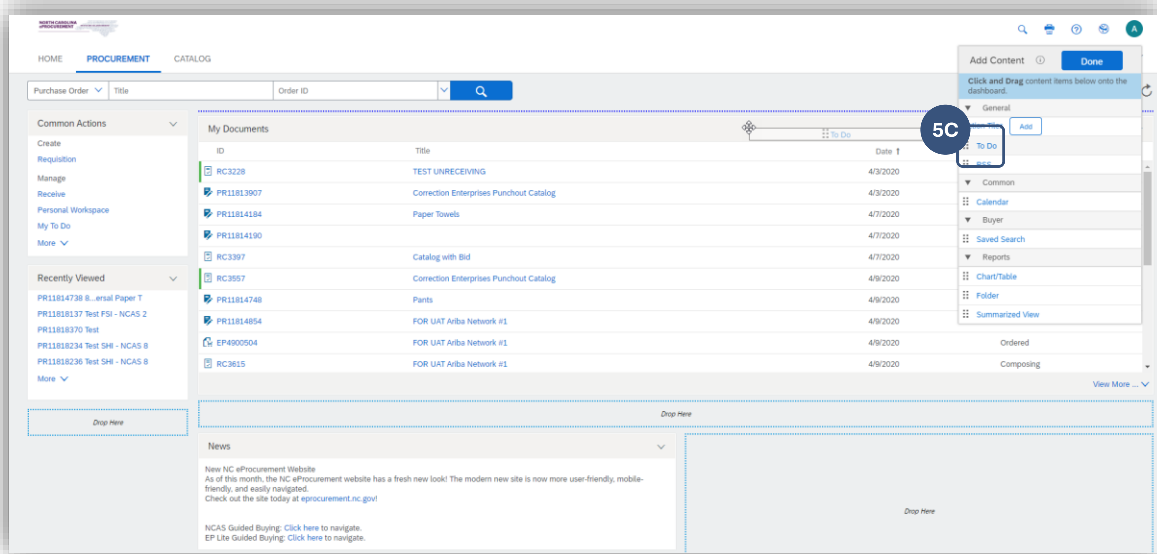
C. If the **To Do** portlet was deleted from the **Home** or **Procurement** tabs, use these steps to add the portlet back to the dashboard:

- 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

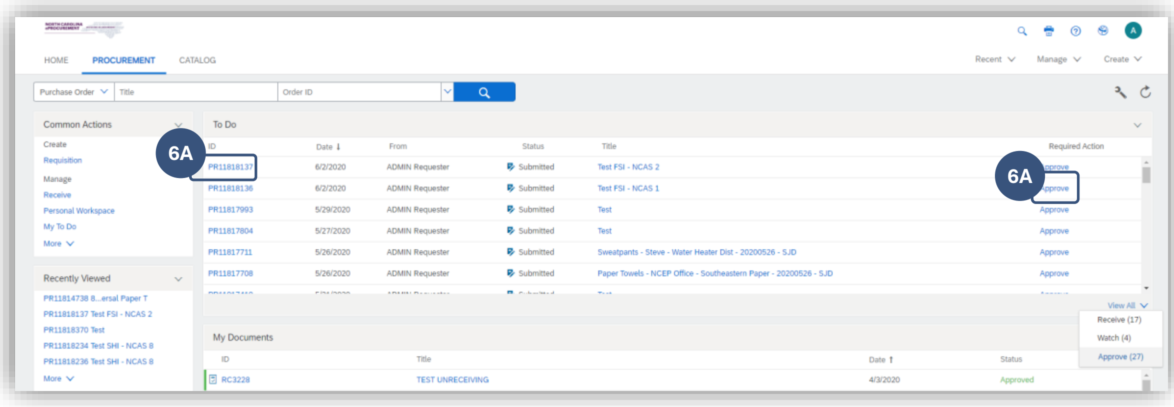
6 The Requisitions that appear in the **To Do** portlet on the **Procurement** tab are approvables that require the action of the user that is currently logged in.

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.

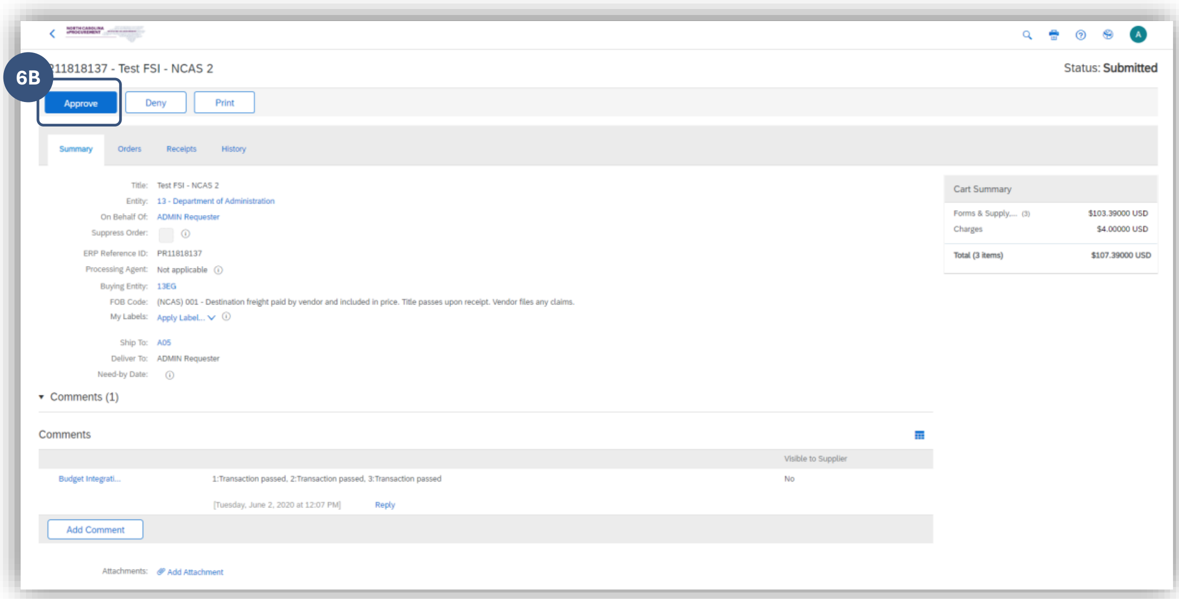
The **View All** link in the bottom right of the **To Do** portlet will display the number of requisitions awaiting action, organized by category

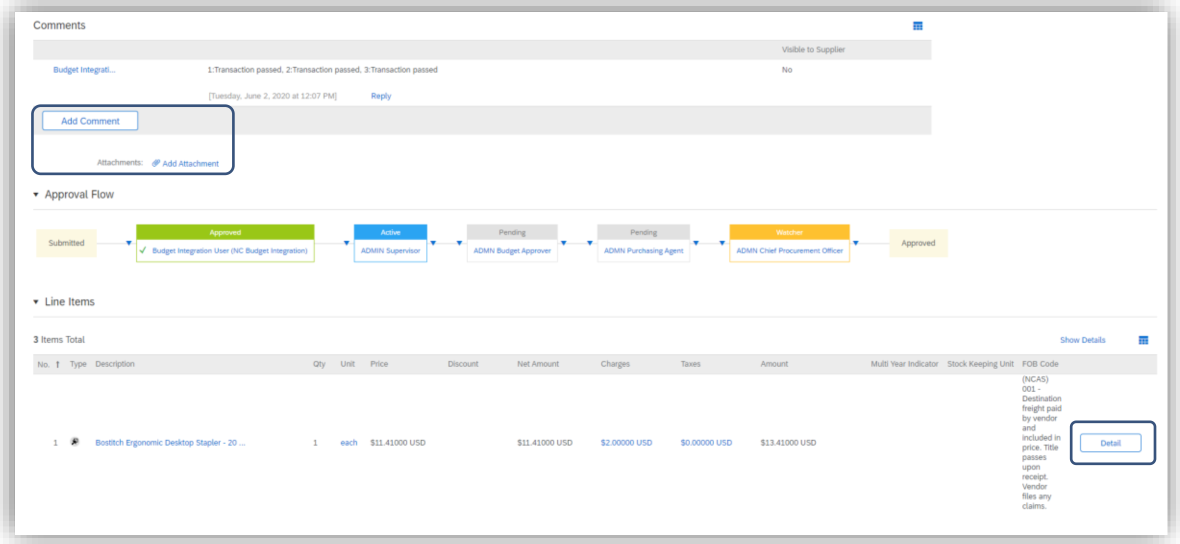
Approving a Requisition



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.



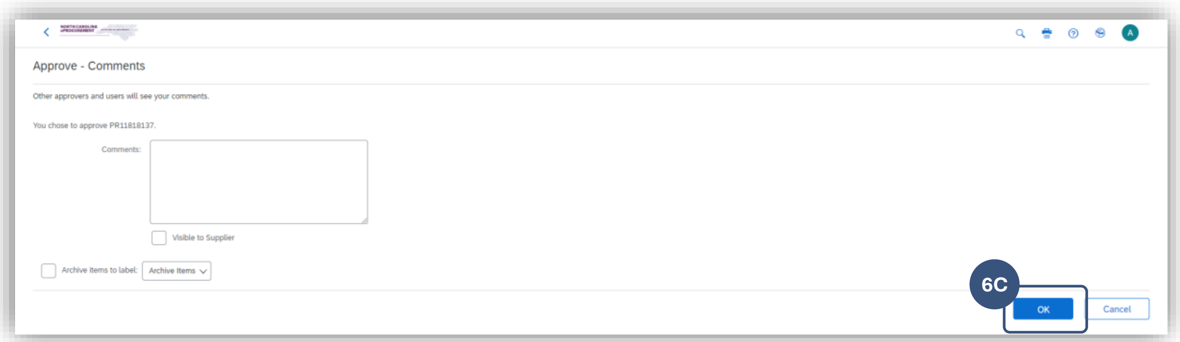


C. Once the user clicks **Approve**, the **Approve - Comments** page will appear. Add any necessary comments and click **OK**.

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 Purchas order will move into **Ordered** status.



Approving a Requisition

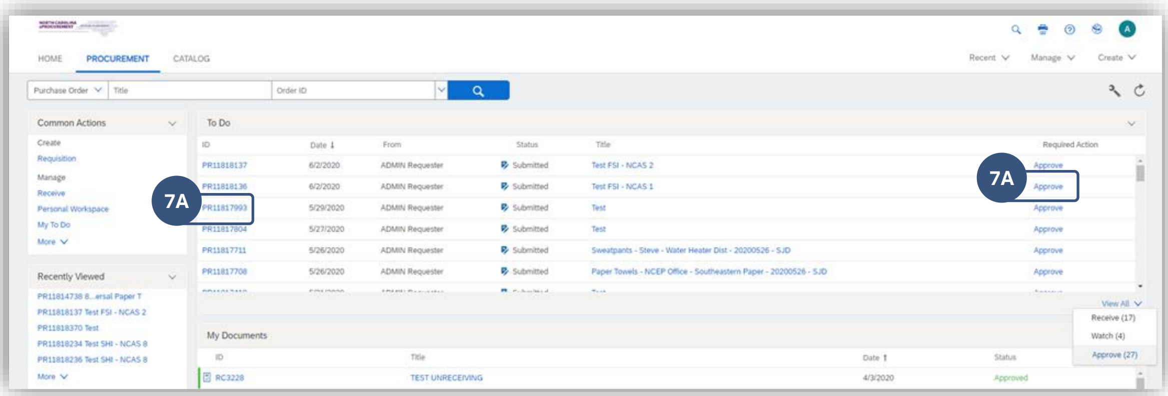
Denying a Requisition – Expert View

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.



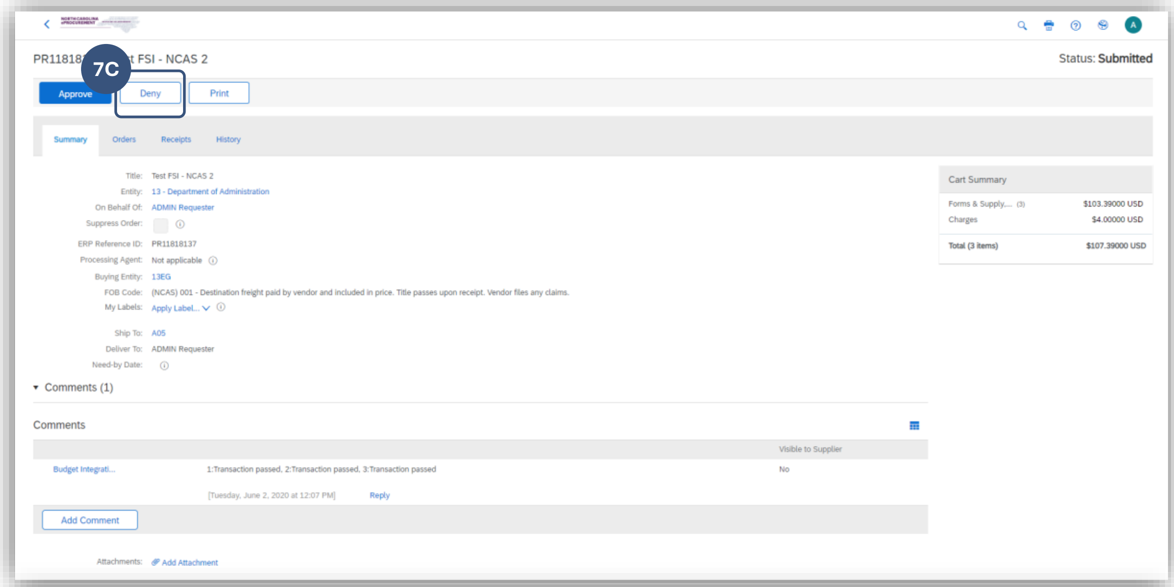
B. Review the requisition to determine if it should be approved or denied.

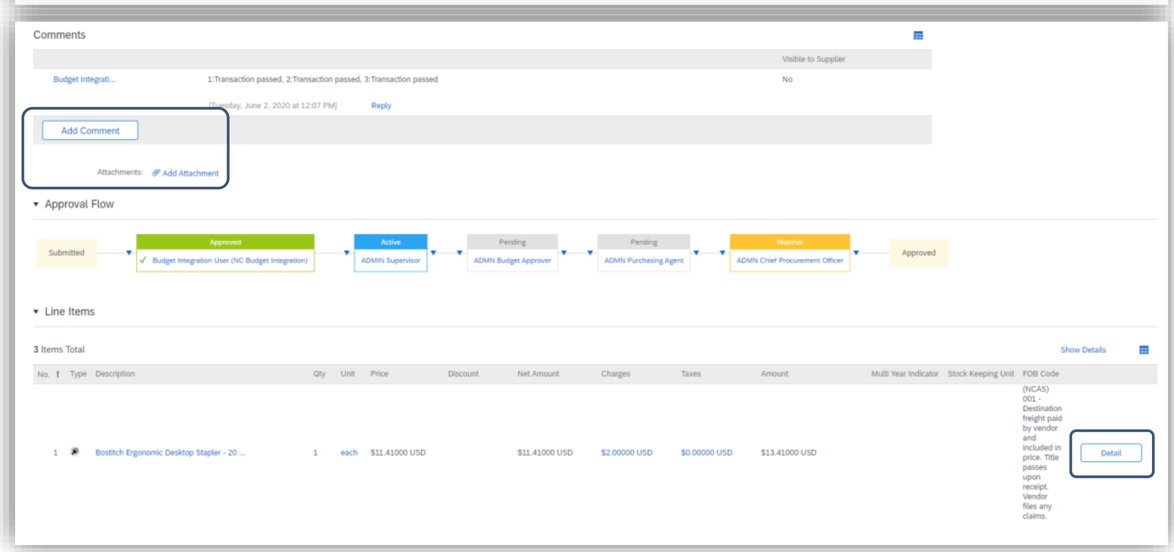
> For information on approving requisitions, see Section 6: Approving a Requisition.

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.

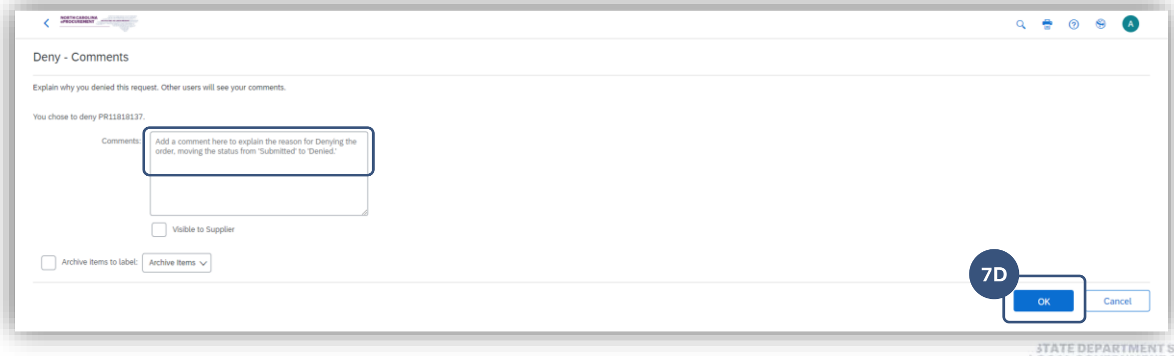
Approving a Requisition





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.



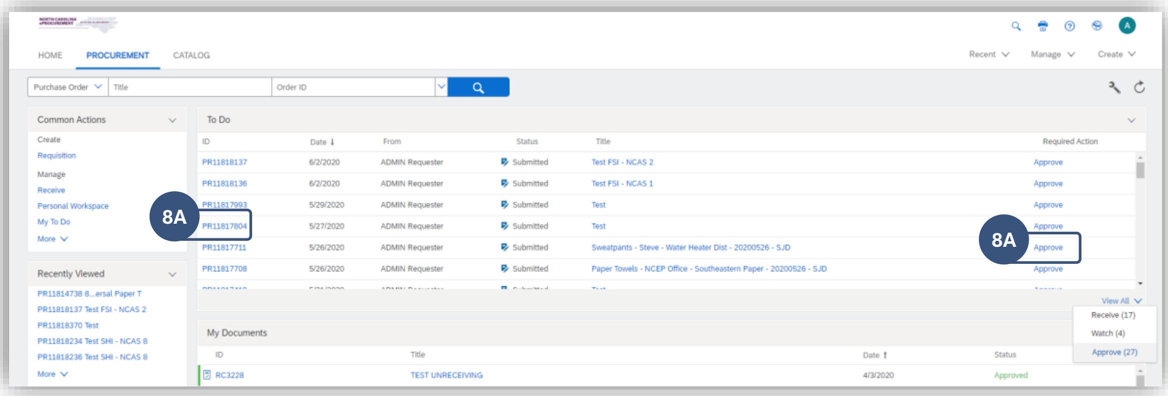
Approving a Requisition

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 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.

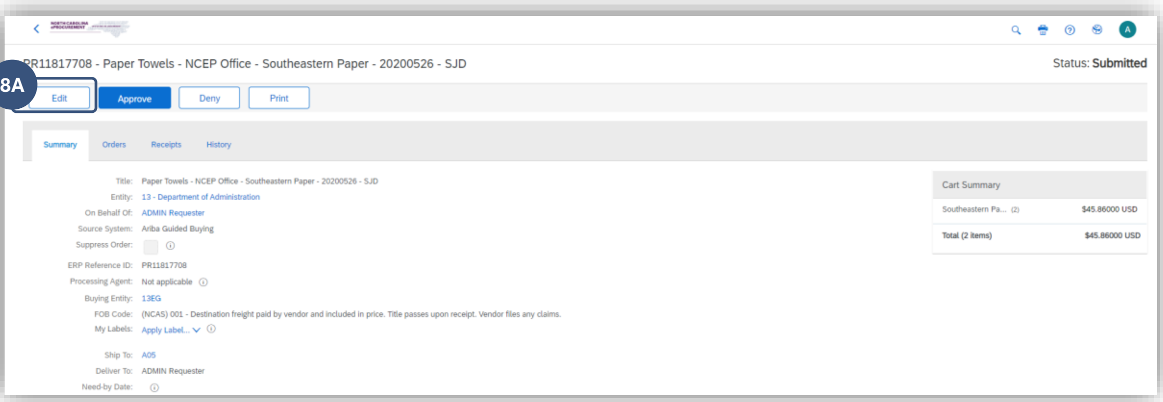
A. Click on the requisition **ID**, **Title**, or the **Approve** link on the **To Do** portlet.

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

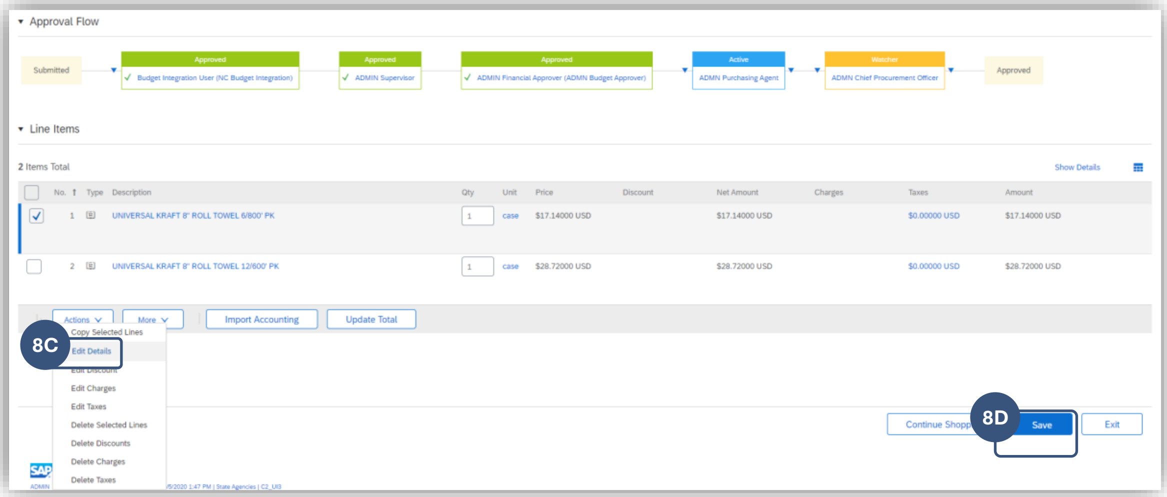
If **Edit** is not appearing, your user profile may not have the Edit role



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.

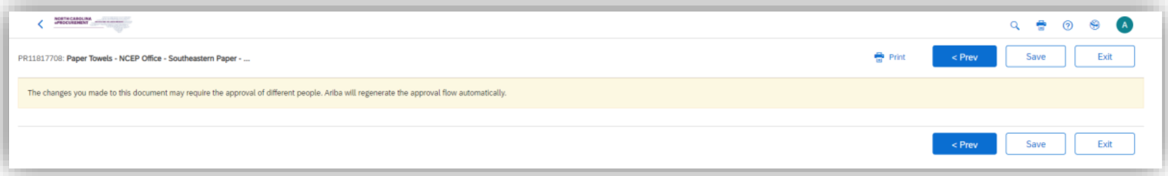
D. Click **Save** to save the updates made to the requisition.

Approving a Requisition



B. Users will be taken back to the Summary page for the requisition, where theyll 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**.

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