Approving an eRequisition

The approval process for NC E-Procurement allows the appropriate personnel to approve, edit, or deny items that have been requested in NC E-Procurement. Each eRequisition must be fully approved within NC E-Procurement before the purchase order is generated and sent to the supplier. The approval flow for each user may differ based on the user's management level and supervisor. For more information on how approval flows are generated, please refer to the Approval Flow Process Guide. .

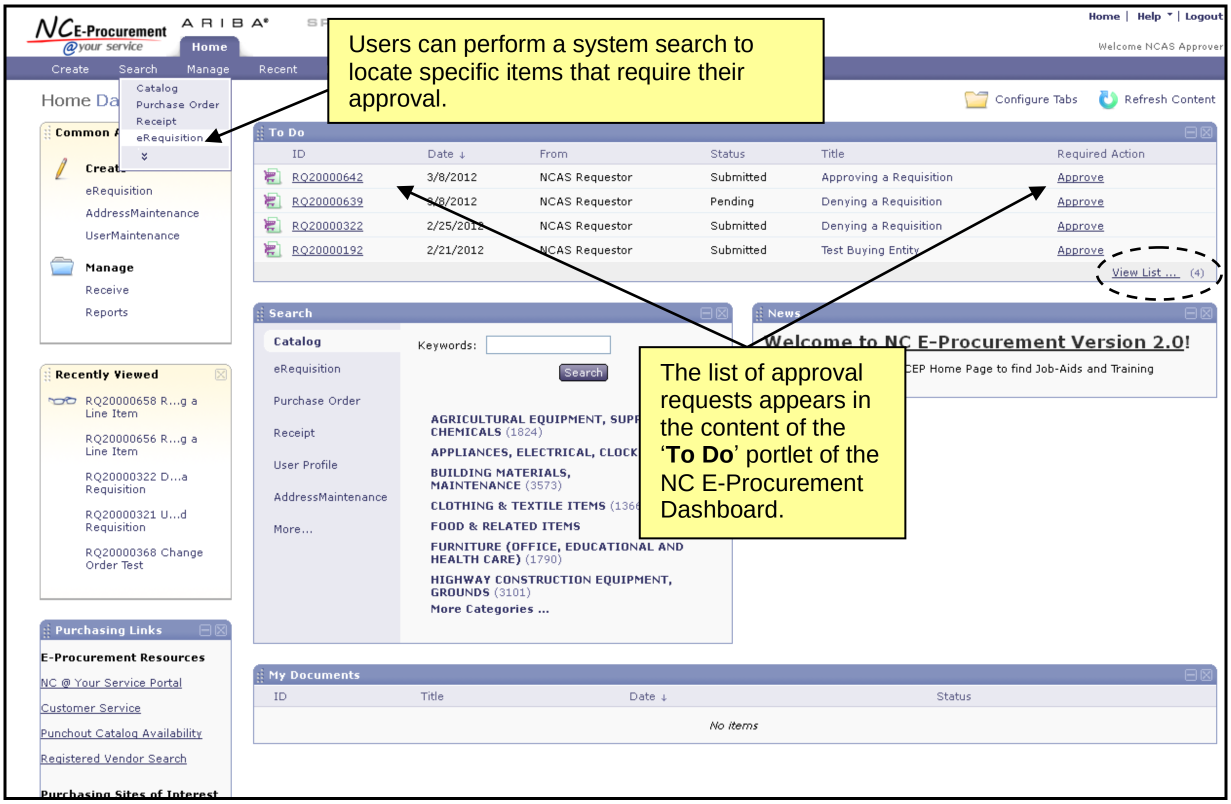
Approvers may set their NC E-Procurement e-mail preferences to receive an e-mail notification each time an eRequisition is sent to them for approval. This e-mail serves as a notification only. The requests will appear in the Approval Requests label even if the approver elects not to receive the notification. For more information regarding email notifications please refer to the 'Edit Email Notification Preferences' process guide.

The items that appear in the **'To Do'** portlet on the Ariba Dashboard 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.

1. Click the eRequisition **'ID'** or the '**Approve**' link from the **'To Do'** portlet on the Ariba Dashboard. Users can also search the system for the requisition number to approve awaiting requests.

Note: If **'Approve'** is clicked instead of the eRequisition ID, only basic requisition details, such as Line Item Description ,Quantity, Price, and Total Amount, will be visible. The approval flow for the item will also be visible. To view additional details on the requisition before approving, click the eRequisition **'ID'** from the **'To Do'** portlet.

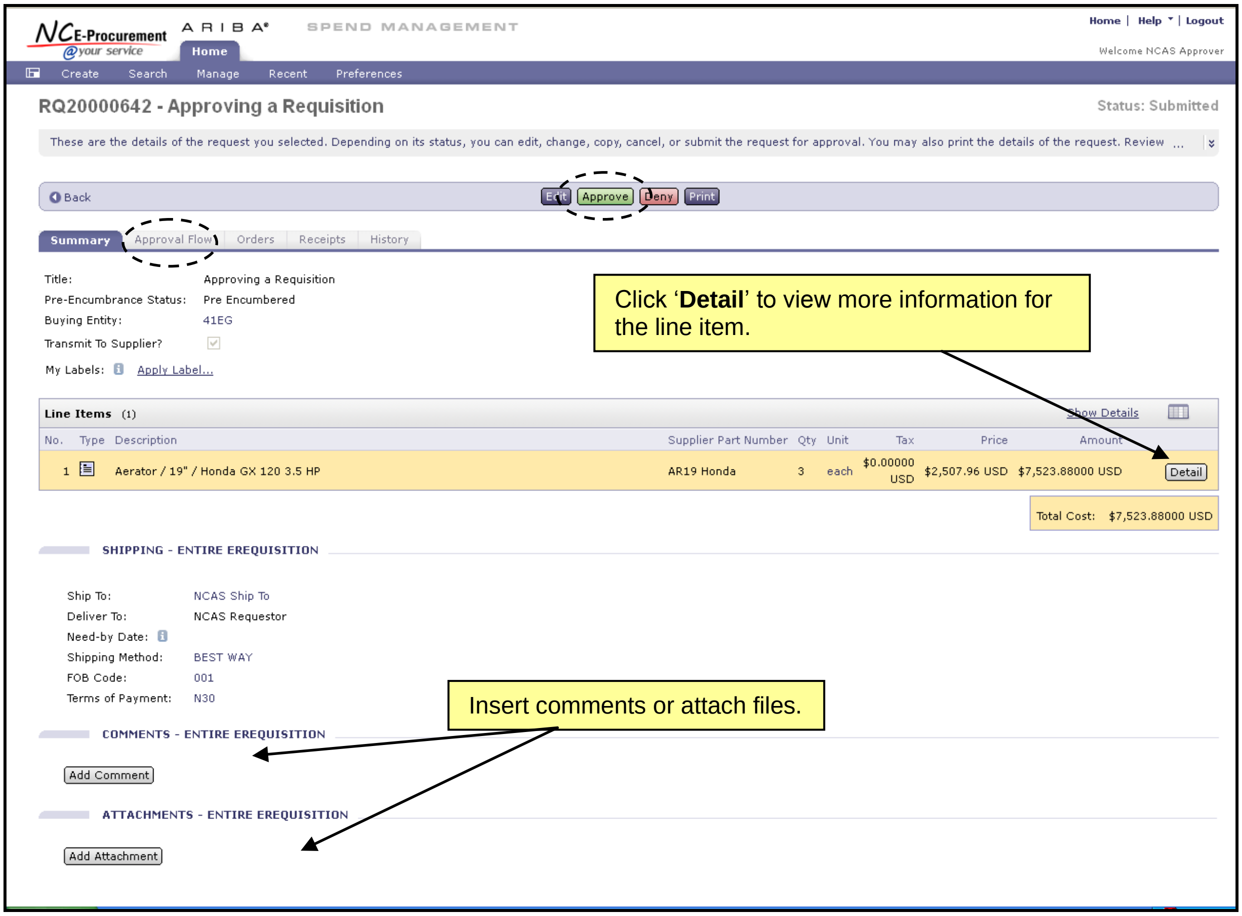
Note: The '**View List**' link will display the number of eRequisitions awaiting approval.



2. Review details and click the **'Approve'** button if the eRequisition is correct.

Note: Users with the necessary permission can also edit the eRequisition during the approval process. This includes updating line items and adding comments and attachments. For more details regarding this process, reference the 'Editing a Line Item as an Approver' Process Guide.

Note: To view the eRequisition's progress through the approval flow, click the **'Approval Flow'** tab.



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

Note: eRequisitions 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 item(s) to label' and choose the appropriate label. For more information about Labels, reference the 'Personal Labels' process guide.

Note for NCAS users: Once all required approvers have approved the eRequisition, the eRequisition will become a purchase order and is automatically sent to the supplier. The status of the eRequisition and purchase order will be **'Ordered.'**

Note for School System and Community College users: Once all required approvers have approved the eRequisition, the eRequisition is then sent to the appropriate financial system (e.g., Sunpac, ISIS, or Colleague) for further processing. The status of the eRequisition will be **'Approved'** and will **not** change.