


## Approving a Requisition

If you are both the Requester and the Approver you will not need to follow this process. The requisition that you save and approve will bypass the Worklist and move on to Budget Checking. You only need to follow this process to review requisitions submitted to you by people that have you as their approver.

As an Approver, you have three options available:

- **Approve:** If you approve a requisition you are agreeing to all of the contents of the document. You are also moving the requisition to the next step in the requisition life cycle, Budget Checking.
- **Deny:** If you deny a requisition you are stopping the requisition from moving to the next step in the requisition life cycle. If you deny a requisition it is no longer usable.
- **Recycle:** If you recycle a requisition you are sending it back to the Requester for changes and then back to you for Approval. This is the option you want to select if the requisition needs modifications.

What you do	What happens
1. You will receive an email message indicating that you have a requisition waiting in your Worklist.	**NOTE: If you are NOT receiving requisition notification messages in your email the problem is most likely caused by running Outlook in cached mode. Please follow the instructions in <a href="#">Appendix A</a> to resolve this problem.
2. From the menu, choose: <b>Worklist, Worklist</b>  OR Click on the <b>Worklist</b> link located in the Navigation bar.	

3. The Worklist page displays.

Worklist for AC624SF: McKibben,Sue IT Training

Detail View Work List Filters: Req Approval Worklist

From	Date From	Work Item	Worked By Activity	Priority	Link		
Instructor,Suzie	11/08/2006	Req Approval Worklist	Requisition Amount Approval		<a href="#">55916_AKRON_0000037426</a>	Mark Worked	Reassign
Instructor,Suzie	11/09/2006	Req Approval Worklist	Requisition Amount Approval		<a href="#">55922_AKRON_0000037430</a>	Mark Worked	Reassign

Verify that the Work List Filters field, shows **Req Approval Worklist**.

What you do	What happens
4. In the <b>Link</b> Column, click on the link for the requisition that you want to review.	

5. The Approval page returns. You can review the complete requisition by clicking on the **View Printable Req** button at the top of the page.

**Requisition Amount Approval**

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Unit: AKRON Req: 0000037426 Requester: Instructor,Suzie

\*Approval Action:  Approval Status: In Process

**Comment**

Please update quantity to 150.

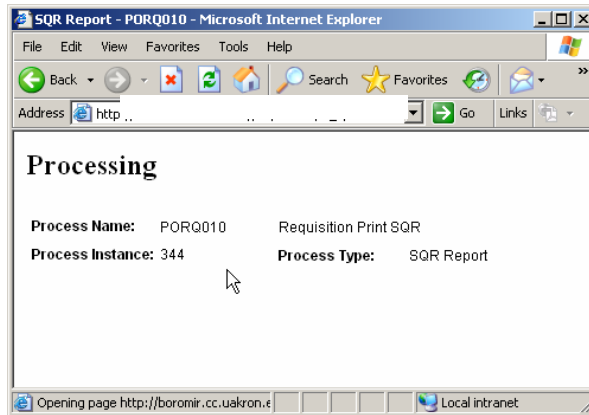
**Amount Details**

<b>Requisition Date:</b>	11/08/2006
<b>Total Amount:</b>	37.500 Dollar
<b>Total Base Amount:</b>	37.500 Dollar

**Line Details**

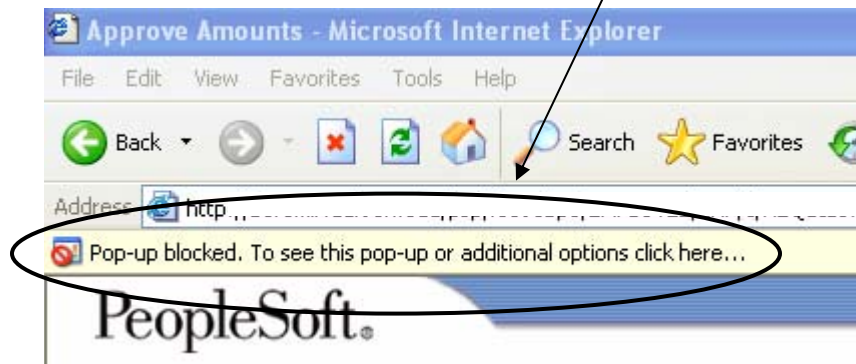
**What you do****What happens**

6. A separate window will open - **do NOT close this window.** Closing the window will cancel the report process.



**NOTE: It may take up to 30 seconds for this screen to appear – please be patient and do not click the View Printable Version link a second time.**

7. If the screen shown in Step 6 above does not appear after 30 seconds look under the address line of your browser and see if the message “Pop-up blocked” is displayed. If this occurs, follow the steps outlined in **Appendix B - Allowing Pop-ups.**

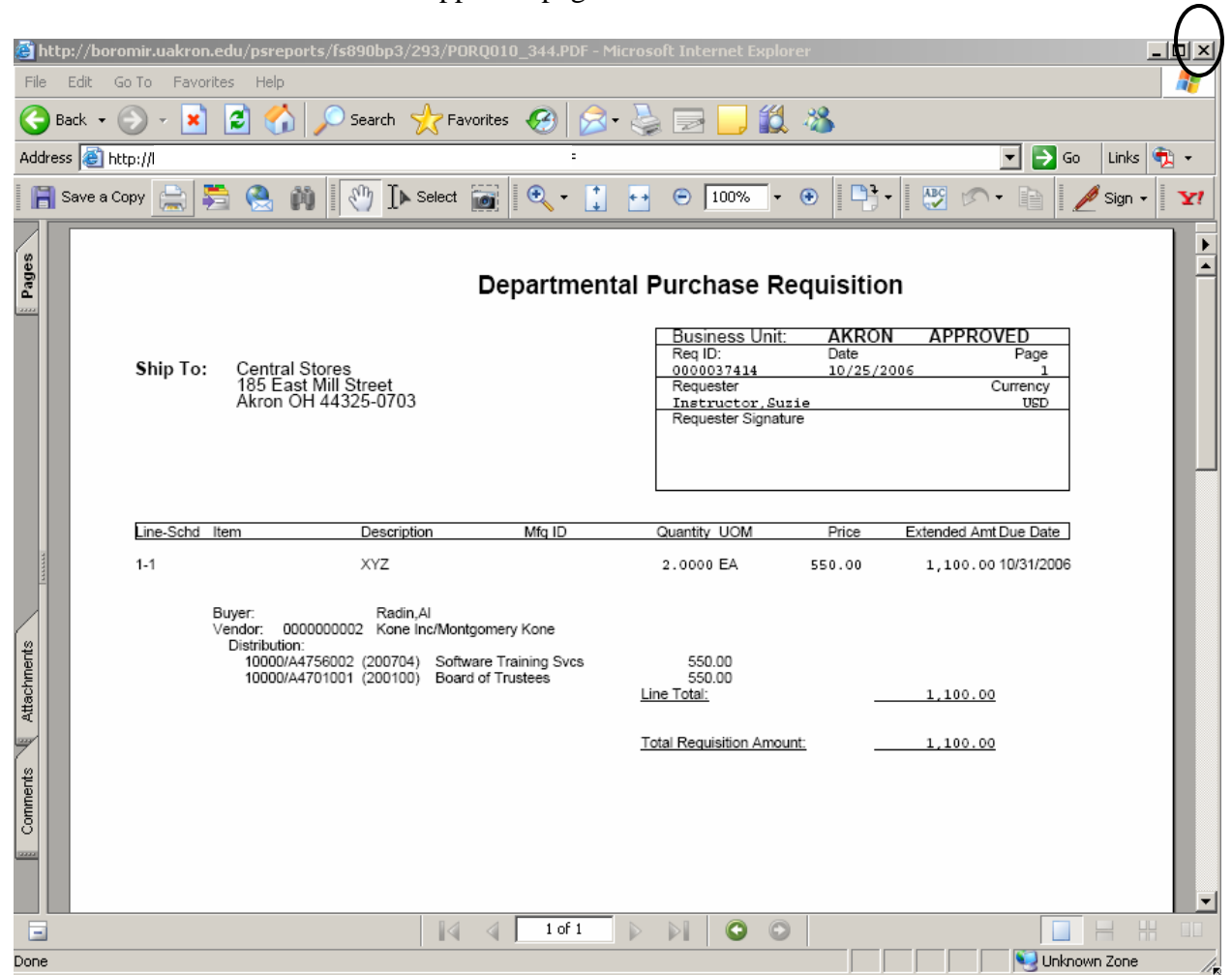


What you do	What happens
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8. Once the process is complete the Requisition will automatically open in a new Internet Explorer/Adobe Viewer window.

At this point you may review the requisition details in order to determine if you should accept, deny, or recycle the requisition.

When you are finished viewing the requisition click the “X” in the upper right corner to close the window and return to the approval page.




What you do	What happens
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9. In the **Approval Action** field you have the following choices:
  - a.  **Approve**: The requisition is approved upon saving and will move to the next step in the Requisition Life Cycle.
  - b.  **Deny**: The request is denied and will not move forward in the Requisition Life Cycle (NO further action can be taken on the requisition).
  - c.  **Recycle**: This option sends the requisition into a “Recycle” status for editing by the requester.


In all cases, an email will be sent to the requester regarding the action you selected and with any comments you may have added.

**Requisition Amount Approval**

Unit: AKRON Req: 0000037426 Requester: Instructor,Suzie 

\*Approval Action: Approve ▾ Approval Status: In Process View Printable Req

**Comment**

Please update quantity to 150. 

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**Amount Details**

<b>Requisition Date:</b>	11/08/2006
<b>Total Amount:</b>	37.500 Dollar
<b>Total Base Amount:</b>	37.500 Dollar

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**Line Details**

Save View Worklist Previous in Worklist Next in Worklist Notify

10. Once you have selected the Approval Action desired click on the <b>Save</b> button.	The Approval Status will change accordingly.
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## Reassigning a Requisition

At times, Approvers may need to reassign a requisition to a different approver when alternate SpeedCharts (old six digit accounts) are used. For example, a requester creates requisitions for multiple Approvers (supervisors).

What you do	What happens
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1. From the Worklist page, click on the **Reassign** button.

Worklist for AC624SF: McKibben,Sue IT Training

Detail View Work List Filters: Req Approval Worklist

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Instructor,Suzie	11/08/2006	Req Approval Worklist	Requisition Amount Approval		<a href="#">55916_AKRON_0000037426</a>	Mark Worked	Reassign
Instructor,Suzie	11/09/2006	Req Approval Worklist	Requisition Amount Approval		<a href="#">55922_AKRON_0000037430</a>	Mark Worked	Reassign

2. The Reassign page returns.
3. If known, enter the **User ID** of the individual to whom you wish to reassign the requisition. The User ID is the ID that the person logs into PeopleSoft with. If you are unsure of the User ID click the magnifying glass icon to search for the individual.

User ID:   ←

Comment:

OK Cancel Refresh

4. The Look Up page is returned. Click the **Advanced Lookup** link to search for the person by their name.

### Look Up User ID

Search by: User ID  begins with

Look Up Cancel [Advanced Lookup](#)

Use the Advanced Lookup to search by last name

What you do	What happens
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5. Type the person's last name in the **Description** box and click the **LookUp** button.

**Look Up User ID**

User ID:

Description:

[Basic Lookup](#)

6. All users with the last name beginning with the criteria entered will be listed under the Search Results heading. Click on the User ID or the name of the person to whom you wish to reassign the requisition.

**Look Up User ID**

User ID:

Description:

[Basic Lookup](#)

**Search Results**

View All First  1 of 1  Last

User ID	Description
<a href="#">AD389MP</a>	<a href="#">Phillips, Michaelle</a>

7. The User ID is now filled in with the appropriate ID. Enter any comments in the **Comment** field, if necessary.

User ID:

Comment:

8. Click on the **OK** button. The requisition can be found in the Worklist of the person to whom the requisition was reassigned.

## Appendix A Junk Email Filters

The approver will receive an email message similar to the one below for each requisition which needs approved.

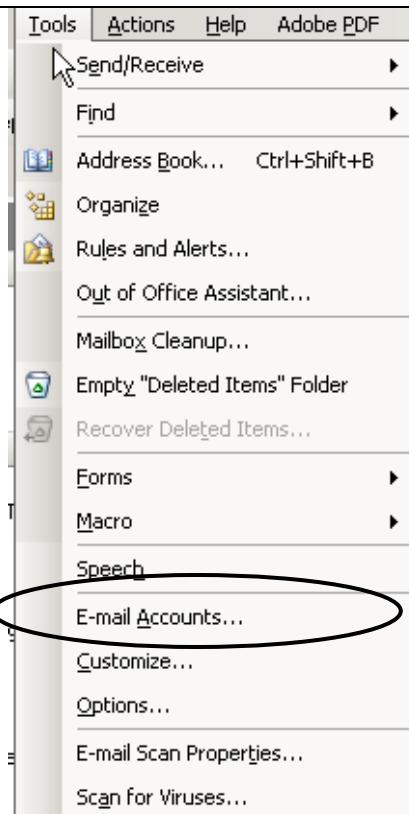
***Requisition in worklist waiting to be approved – goes to the approver***

Subject: Requisition Awaiting Approval

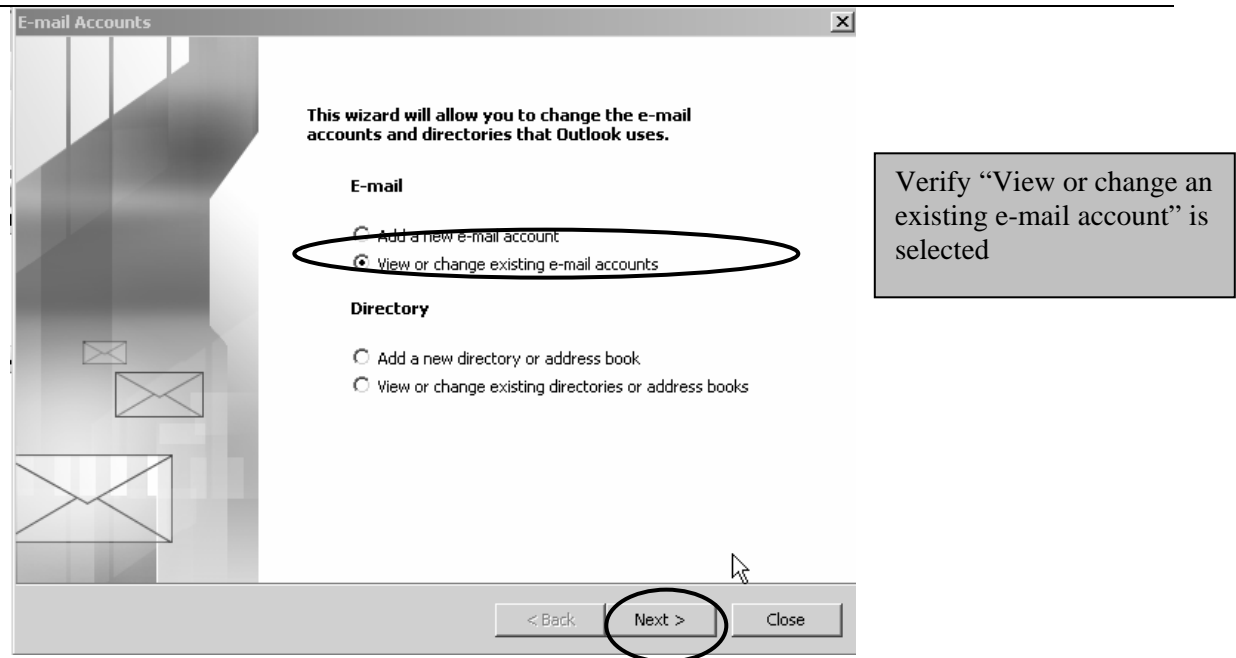
Requisition number 0000918426 entered on 2004-12-16 by Doe,Joan, ABC02JD is in your worklist awaiting approval.

If you are an approver and notice that you are **NOT** receiving email messages to notify you of requisitions in your worklist please follow these instructions to resolve the problem. In some instances, these messages are incorrectly being marked as Junk e-mail due to an incorrect setting on the client's machine. This setting is in Outlook and has the client set up in cached mode.

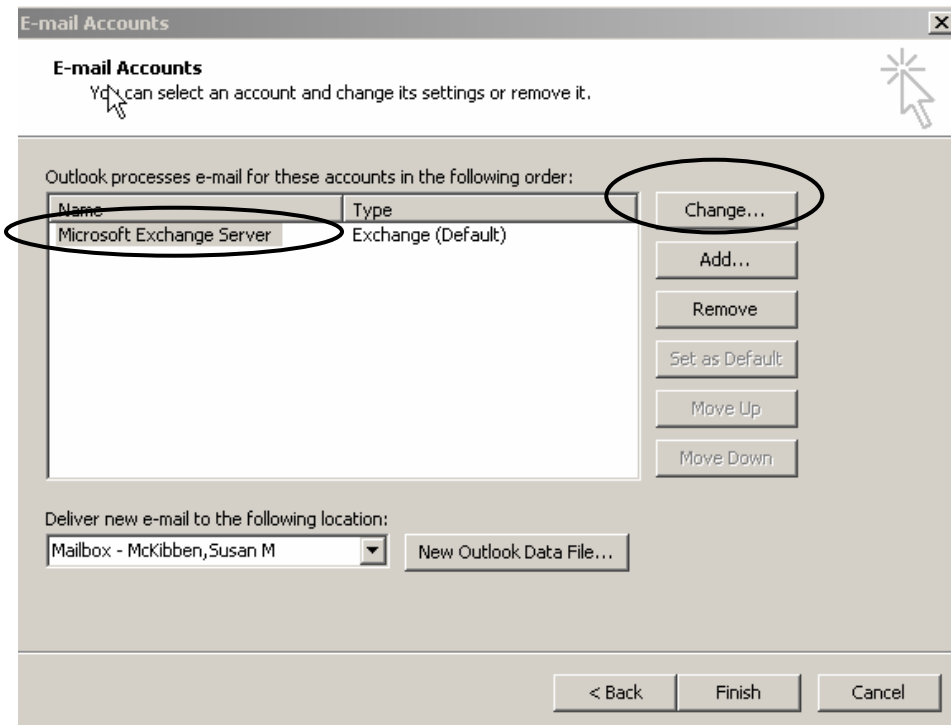
1. Open Microsoft Outlook.
2. Double-click the **Tools** menu and select **E-Mail Accounts**.



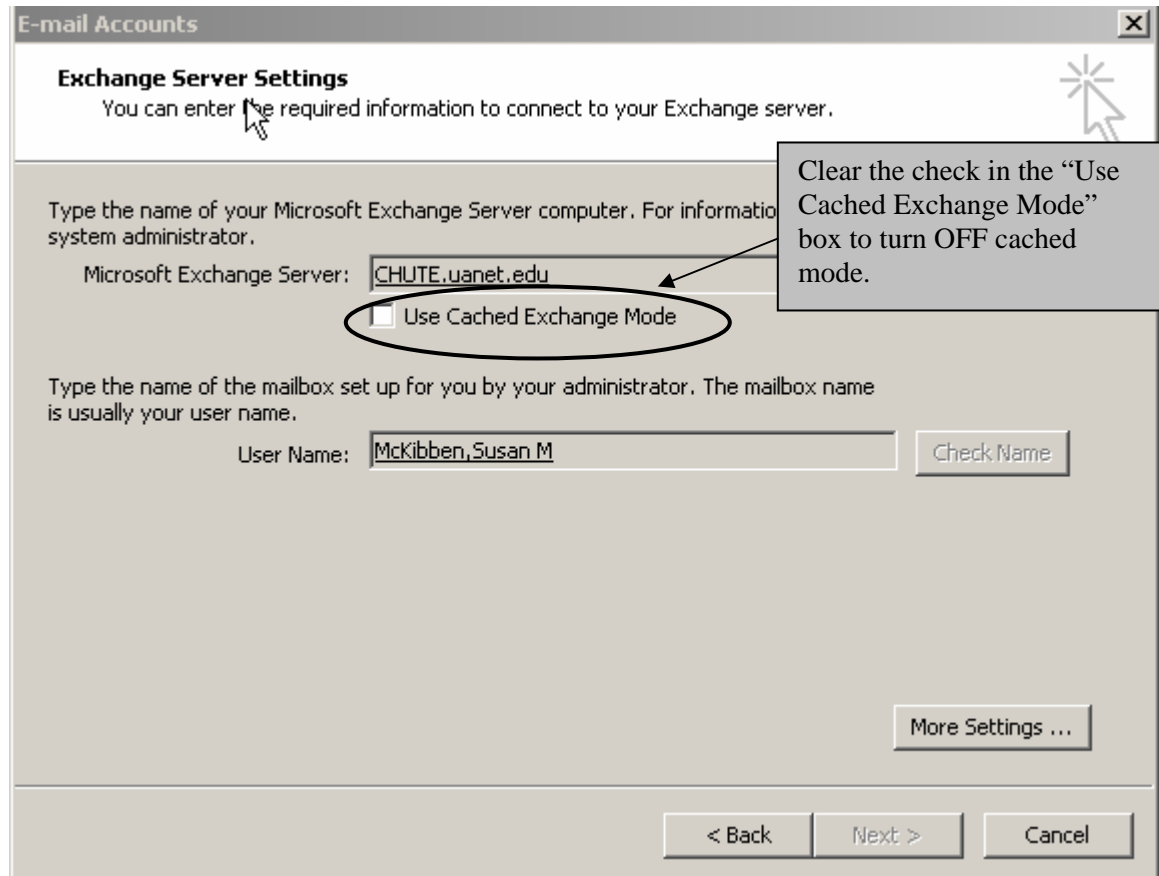
- The E-mail Accounts dialog box is returned. Click **View or change existing e-mail accounts**, and then click **Next**.



- Under the heading "**Outlook processes e-mail for these accounts in the following order**", click the **Microsoft Exchange Server** e-mail account, and then click **Change**.



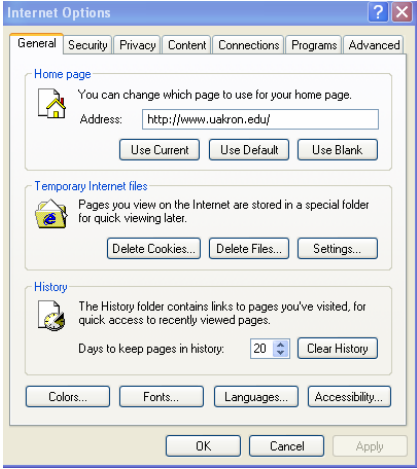
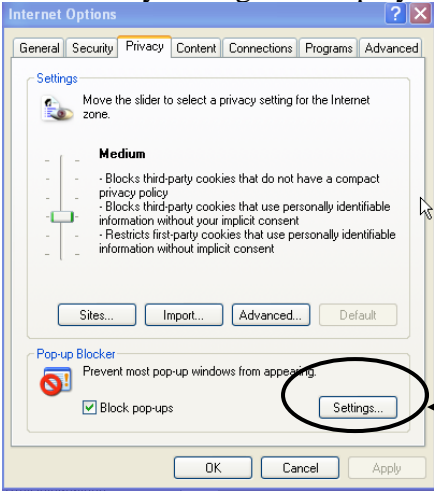
- Under **Microsoft Exchange Server**, clear the **Use Cached Exchange Mode** check box. Your screen should look similar to the one below (with no check in the “**Use Cached Exchange Mode**” box).



- Click the **Next** button.
- Click the **Finish** button.
- Exit and then restart Outlook.

## Appendix B Allowing Pop-Ups

The following instructions are provided to enable pop-ups from The University of Akron web sites.

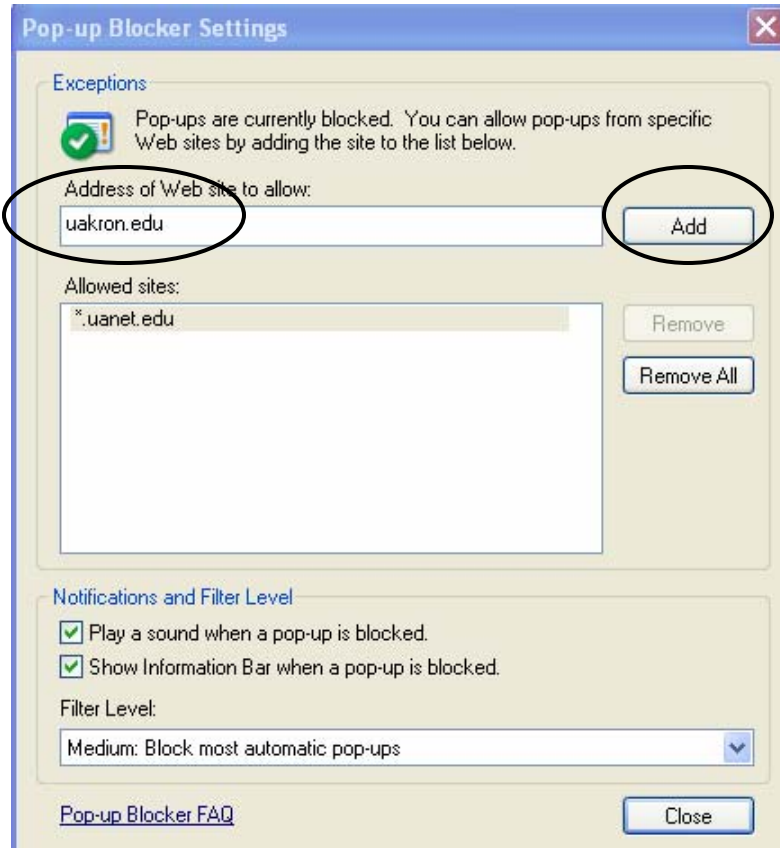
What you do	What happens
<p>1. From within Internet Explorer, select <b>Tools - Internet Options</b>.</p>	<p>The Internet Options page is displayed.</p> 
<p>2. Click the <b>Privacy</b> tab.</p>	<p>The Privacy settings are displayed:</p> 

What you do	What happens
3. Click the <b>Settings</b> button located at the bottom of the screen. The Pop-Up Blocker Settings page is displayed.	



What you do	What happens
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4. Type the following under “Address of Web site to allow:” *uakron.edu*
5. Click the **Add** button.



What you do	What happens
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6. Under “Allowed sites” you should see **\*.uakron.edu**. Make sure there is a check in the box for “**Show Information Bar when a pop-up is blocked**”.
7. Click the **Close** button.
8. Click **OK**.

