Instructions for Approving a Purchase Requisition Transaction

Approvers should review the Purchase Requisition information for their approval. Respond promptly to all email notifications from the FMS System to review and approve your designated purchase requisition. Approvers are held accountable for their defined approval information on the eProcurement purchase requisition. Please be sure to check requisition information carefully for necessary requirements such as policy violations, funding, allocations, etc.

NOTE: Budget Checking will be done by the Purchasing office staff. Do not click the Budget Check button.

NOTE: It is important that you, as an approver, assign your approval duties to the appropriate person when you are traveling for work or are on vacation and unable to approve your assigned purchase requisitions. The person you delegate to approve purchase requisitions on your behalf should be either up the chain of command from your position or the next person below in the department in the chain of command. Instructions are available on the Purchasing website.
E-Procurement Business Process Flow:

The following diagram lists the business process/activity flow for requestors and approvers using Peoplesoft E-Procurement Purchase Requisition module.

**LEGEND:**
- eProcurement Overview Process Flow
- How do approvals work in eProcurement?
FMS eProcurement purchase requisitions need to be approved. This document gives detailed instructions on the approval process in PeopleSoft.

1. You will receive an email notifying you have an FMS eProcurement purchase requisition to review and approve. Please review below example.

<table>
<thead>
<tr>
<th>From:</th>
<th><a href="mailto:CWUCode@uw.edu">CWUCode@uw.edu</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>To:</td>
<td>d <a href="mailto:henry@uw.edu">henry@uw.edu</a></td>
</tr>
<tr>
<td>Subject:</td>
<td>Approval is requested for Requisition ID: 0000000000 Business Unit: Central Washington University</td>
</tr>
</tbody>
</table>

A requisition has been entered which requires your attention.

- Requestor:   
- Business Unit: Central Washington University
- Requisition ID: 0000000000
- Requisition Name: Pigs for Athletics Dept.
- Date: 2023-07-30

You can navigate directly to the approved page by clicking the link below:

https://mycwa.cwu.edu/0000000000/PiGZLLOBEMELORE/PigZLLOBEMELORE_MAIN/Main menu?Req_Approval=false&Business_Unit=Central Washington University&Search_ID=0000000000

Click on the http link provided in the email and it should log you into the Financial Management area.

OR follow the below instructions

2. Sign into MyCWU

3. On the MyCWU Dashboard
Under the FMS Approvals Pagelet, click on Manage Requisitions Approvals link (see below screen shot)

On the Approve Requisitions page, three fields will come in filled with values. **Status, Date From**, and **Date To** will have values that you can change if you desire.

If these settings are appropriate, click the **Search** button.

If you have requisitions to approve, they will appear once the button has been clicked. See below example.
To see all line items for all requisitions, click the Expand All link. See above example.

Click the link for the particular Requisition ID you would like to review or click the links for each particular line item.

The below page will appear if you click on the link for the Requisition ID. The page is designed to come in with all lines to be selected and can approve or deny by clicking on the Approve or Deny buttons. To review each line item, click on the Item Description link. You can uncheck certain line items if you desire.
To view the funding information click on the View Line Details button. A new browser window will appear with the details regarding the line items selected. To close the browser window click the X button.
9. To approve a requisition, click on the Approve button. The below page will appear indicating further workflow approvals.
To deny all or one line, select the line item and click the Deny button. If you do not enter any Approver Comments, you will receive the below message. Click the OK button.

Enter comments explaining why you are denying this requisition line, then, click 'Deny' again. (18036,6226)

Comments are required explaining why this requisition line is denied, so the requester knows why this requisition line will not be approved. If appropriate, please include details of what the requester can change to get the requisition line approved.
Enter Comments on why you are denying this requisition or requisition line item. See below example.

### Requisition Approval

- **Req Name:** New Instruments for Band 101
- **Total:** $209.00 USD
- **Requestor:** Tina A. Toman
- **Entered on:** 07/30/2013
- **Status:** Pending
- **Business Unit:** CVU1D
- **Request ID:** 0000000008
- **Priority:** Medium
- **Requester’s Justification:** No justification entered by requestor.

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Vendor Name</th>
<th>Qty</th>
<th>Unit</th>
<th>Price</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Trombones</td>
<td>BALENUSI</td>
<td>4.0000</td>
<td>EA</td>
<td>$50.0000 USD</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Trumpets</td>
<td>BALENUSI</td>
<td>12.0000</td>
<td>EA</td>
<td>$300.0000 USD</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Drums</td>
<td>BALENUSI</td>
<td>0.0000</td>
<td>EA</td>
<td>$200.0000 USD</td>
<td></td>
</tr>
</tbody>
</table>

The below workflow approver message will appear. This will generate an email to the requestor to take action on.

11. The below workflow approver message will appear. This will generate an email to the requestor to take action on.
When you return to the requisition, you will note that there are only 2 line items left for approval. Note the time icon next to them. The item that has been denied no longer is available for approval.

If you have any questions, please contact the Purchasing Office (509-963-1001) or email purchasing_office@cwu.edu.