

## Instructions for Approving an Online Purchase Requisition Transaction

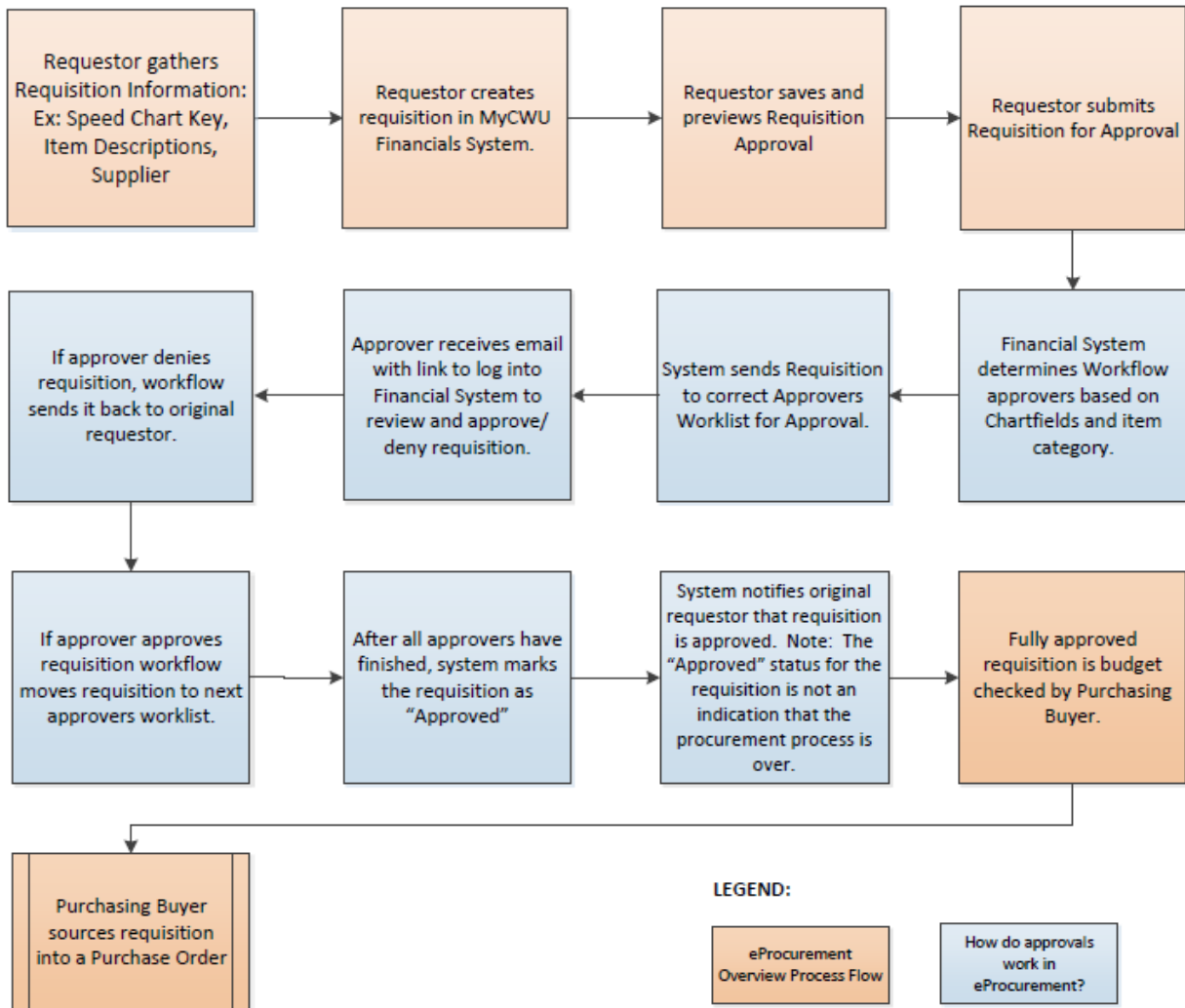
Approvers should review the **Purchase Requisition** information for their approval. Respond promptly to all email notifications from the FMS System to review and approve your designated purchase requisition. Approvers are held accountable for their defined approval information on the eProcurement purchase 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.**

**Requisition Business Process Flow:**

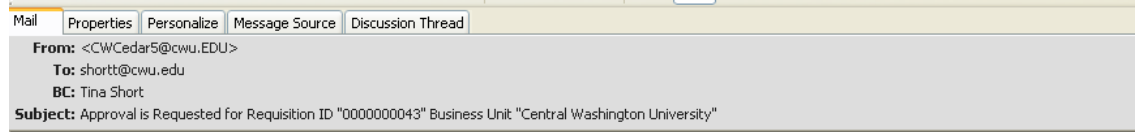
The following diagram lists the business process/activity flow for requestors and approvers using MyCWU Financial System Procurement Purchase Requisition module.



MyCWU Financial System purchase requisitions need to be reviewed for approval. This document gives detailed instructions on the approval process in MyCWU.

1.

You will receive an email notifying you have a MyCWU Financial system purchase requisition to review and approve or deny. Please review below example.



A requisition has been entered which requires your attention.

Requester: DIEMERM  
 Business Unit: Central Washington University  
 Requisition ID: [0000000043](#)  
 Requisition Name: PCs For Athletics Dept.  
 Date: 2013-07-08

You can navigate directly to the approval page by clicking the link below.

[https://fuschia.cts.cwu.edu:9300/psp/tst/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_APPROVAL.GBL?Action=U8&BUSINESS\\_UNIT=CWUID&REQ\\_ID=0000000043](https://fuschia.cts.cwu.edu:9300/psp/tst/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U8&BUSINESS_UNIT=CWUID&REQ_ID=0000000043)

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

**OR follow the below instructions**

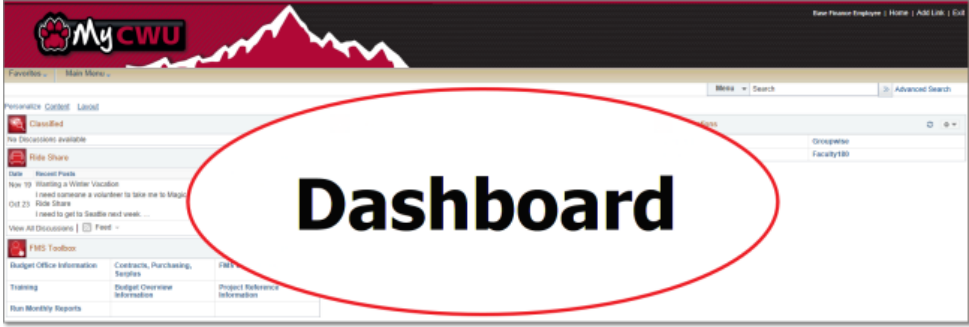
2.

**Sign into MyCWU**

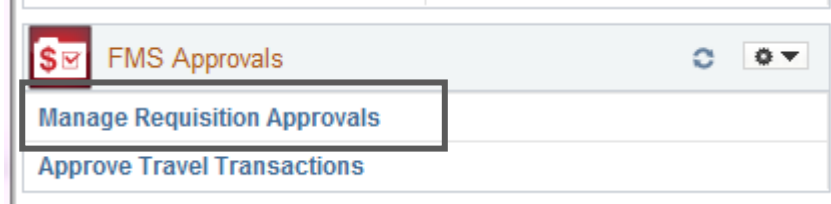


**Communication  
Page**

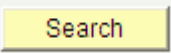
**3.** On the MyCWU Dashboard > Manager Link

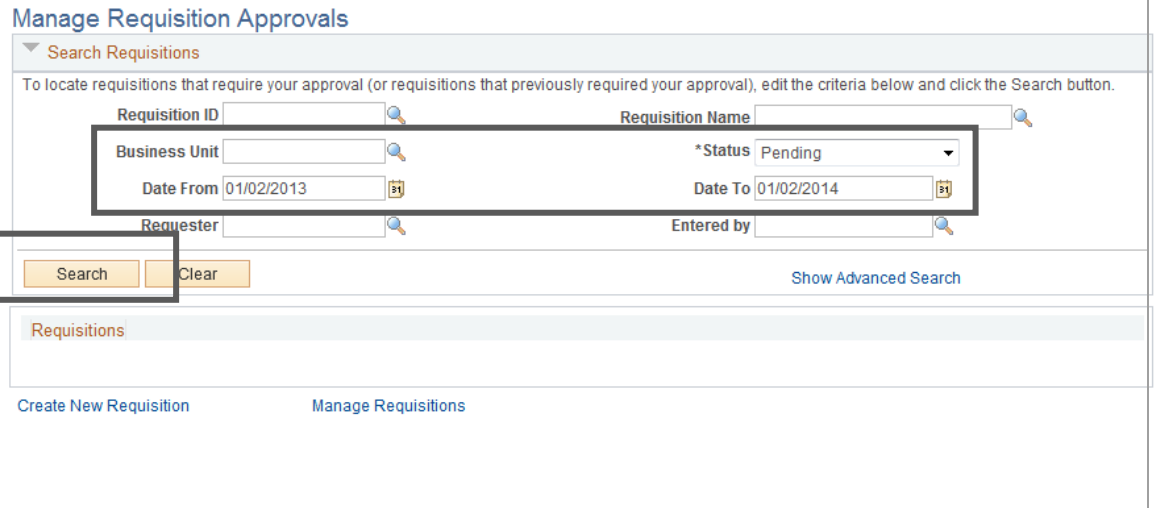


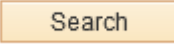
OR For those that aren't Managers, on the Employee link - Under the FMS Approvals Pagelet, click on Manage Requisitions Approvals link (see below screen shot)



**4.** 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 .



**5.** If you have requisitions to approve, they will appear once the  button has been clicked. See below example.

**Manage Requisition Approvals**

**Search Requisitions**

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search

Requisition ID  Requisition Name

Business Unit  \*Status Pending

Date From 01/26/2013 Date To 01/26/2014

Requester  Entered by

Search Clear Show Advanced Search

**Requisitions**

To approve or deny one or more pending requisitions, select the appropriate action from the dropdown and click submit. To view the complete details of a requisition, click the Requisition ID link.

Expand All Collapse All

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By
Pending	0000001070	SHORTT "Go Live"	CWUID	01/25/2014	Tina Short	Tina Short

Mark All:  Approve  Deny

Submit

To see all line items for all requisitions, click the Expand All link. See above example.

6.

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

**Requisitions**

To approve or deny one or more pending requisitions, select the appropriate action from the dropdown and click submit. To view the complete details of a requisition, click the Requisition ID link.

Expand All Collapse All

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By
Pending	0000001070	SHORTT "Go Live"	CWUID	01/25/2014	Tina Short	Tina Short

Mark All:  Approve  Deny

Submit

7.

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. You can uncheck certain line items if you desire.

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price	
1	Honorarium for Speaker		1.0000	EA	300.00000	US

Buttons:  Select All / Deselect All, **View Line Details**

Review/Edit Approvers

Enter Approver Comments

Buttons:  Approve,  Deny,

Return to Approve Requisitions      Previous in List      Next in List

8. To view the funding information click on the **View Line Details** button.

**View Line Details**

A new browser window will appear with the details regarding the line items selected. To close the browser window click the X button.

<b>Business Unit:</b> CWUID	<b>Requester:</b> SHORTT	<b>Status:</b> Pending Approval
<b>Requisition:</b> 0000001070	<b>Requested By:</b> Tina Short	<b>Currency:</b> USD
<b>Requisition Name:</b> SHORTT "Go Live"	<b>Entered Date:</b> 1/25/14	<b>Requisition Total:</b> 4.00

Line: 1	Item Description: TEST "Chair"	Quantity: 2.0000	UOM: EA	Price: 2.00	Line Total: 4.00
					Line Status: Pending

<b>Ship Line:</b> 1	<b>Ship To:</b> CENTREC80	<b>Address:</b>	<b>Shipping Quantity:</b> 2.0000
<b>Attention:</b> Tina Short	<b>Due Date:</b>	Central Washington University Central Receiving 11th and D Street Ellensburg WA 98926-7525 United States	<b>Shipping Total:</b> 4.00


Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	PURCHASE	2.0000	100.00	4.00	CWUID	53410

Dept	Oper Unit	Fund	Program	Class	Budget Ref
23006	0	001	083	010	2006R

Open QTY	Project	Open Amt
2.0000	11777000	0.000

GL Base Amount	Currency	Sequence
4.00	USD	0

9. To approve a requisition, click on the **Approve** button . The below page will appear indicating further workflow approvals.

 **SHORTT "Go Live" has been routed for further approval.**


[Review/Edit Approvers](#)

### Project Manager Approval


**Line 1: Pending** [View/Hide Comments](#)  
TEST "Chair"

**Project Manager Approval**


**Approved**

 **Tim McGuire**  
ePro Project Managers  
01/26/14 - 8:03 AM

**Pending**

 **PATELA**  
ePro Project Managers

**Pending**

 **TEST**  
ePro Project Managers


**Comment History**

### Buyer Approval

**SHORTT "Go Live": Awaiting Further Approvals** [View/Hide Comments](#)


**Buyer Approvers**

**Not Routed**

 **Karen L Galbraith**  
Buyers

**Comment History**

10.

To deny all or one line, select the line item and click the Deny button  **Deny** . If you do not enter any Approver Comments, you will receive the below message. Click the OK button.

**Message** ✕

Enter comments explaining why you are denying this requisition line, then, click 'Deny' again. (18036,6228)

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.

**OK**

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: 9,200.00 USD  
 Requester: [Tinia A Wyman](#)  
 Entered on: 07/03/2013  
 Status: Pending

Business Unit: CWUID  
 Requisition ID: 0000000038  
 Priority: Medium

Requester's Justification:  
*No justification entered by requester.*

**Line Information**

Line	Item	Description	Vendor Name	Qty	UOM	Price	Curr
<input checked="" type="checkbox"/>	1	Trombones	MALEMUSI	4.0000	EA	950.00000	USD
<input type="checkbox"/>	2	Trumpets	MALEMUSI	12.0000	EA	300.00000	USD
<input type="checkbox"/>	3	Clarinets	MALEMUSI	8.0000	EA	225.00000	USD

Select All / Deselect All

**Review/Edit Approvers**  
 Enter Approver Comments

Currently the music department has enough stock trombones

[Return to Approve Requisitions](#) Previous in List Next in List

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



	Line	Item Description	Vendor Name	Qty	UOM
<input type="checkbox"/>	1	<a href="#">Trombones</a>	MALEMUSI	4.0000	EA
<input checked="" type="checkbox"/>	2	<a href="#">Trumpets</a>	MALEMUSI	12.0000	EA
<input checked="" type="checkbox"/>	3	<a href="#">Clarinets</a>	MALEMUSI	8.0000	EA

[Select All / Deselect All](#)

▼ **Review/Edit Approvers**

### Project Manager Approval

▼ **Line 1: Denied** [View/Hide Comments](#)

Trombones

Project Manager Approval

**Denied**

[Lamar Todd Shiver](#)  
ePro Project Managers  
7/7/2013 - 1:15 PM

▶ **Comments**

▼ **Line 2: Pending**

Trumpets

Project Manager Approval

**Pending**

[Lamar Todd Shiver](#)  
ePro Project Managers

▼ **Line 3: Pending**

Clarinets

12.

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.

**Requisition Approval**

Req Name: New Instruments for Band 101  
 Total: 9,200.00 USD  
 Requester: [Tinia A Wymann](#)  
 Entered on: 07/03/2013  
 Status: See Lines

Business Unit: CWUID  
 Requisition ID: 0000000038  
 Priority: Medium

Requester's Justification:  
 No justification entered by requester.

▼ **Line Information**

	Line	Item Description	Vendor Name	Qty	UOM	Price	Curr
<input type="checkbox"/>	1	<a href="#">Trombones</a>	MALEMUSI	4.0000	EA	950.00000	USD
<input checked="" type="checkbox"/>	2	<a href="#">Trumpets</a>	MALEMUSI	12.0000	EA	300.00000	USD
<input checked="" type="checkbox"/>	3	<a href="#">Clarinets</a>	MALEMUSI	8.0000	EA	225.00000	USD

[Select All / Deselect All](#)

▶ **Review/Edit Approvers**  
 Enter Approver Comments

If you have any questions, please contact the Purchasing Office (509-963-1001) or email [purchasing\\_office@cwu.edu](mailto:purchasing_office@cwu.edu).