

HUSKYBUY UCONN Requisition Approval

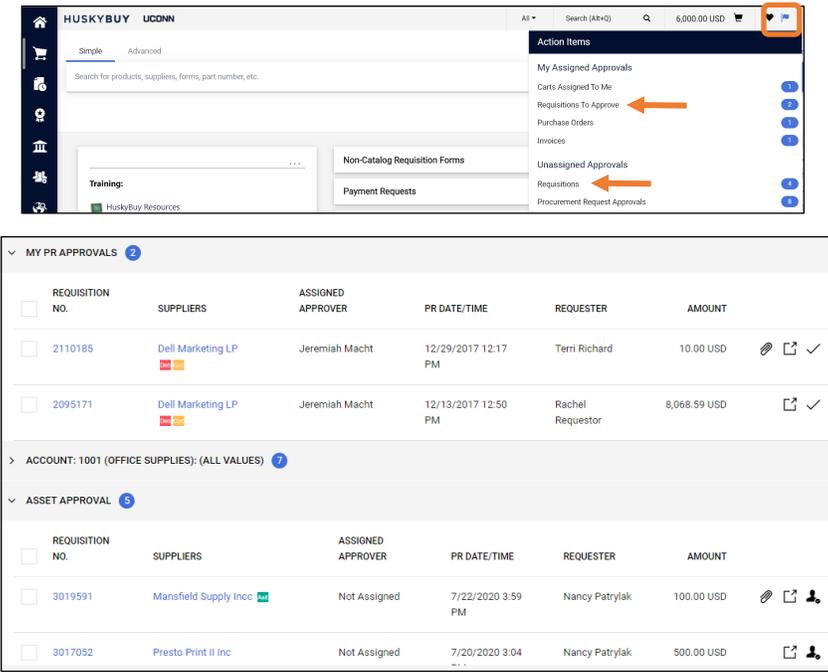
Support
(860) 486-2BUY (2289)
HuskyBuySupport@UConn.edu

Overview When creating a requisition through HuskyBuy, you must be well versed on the practices and policies within procurement. (You can view those policies in the Buyer/Payer Guide.) Requisition approval is a required activity for all requisitions over the \$5,000 threshold. Requisition approvers can only view, approve, return, and/or reject requisitions. They cannot edit fields.

Contents Included within this user-guide you will find:

- [Accessing Requisitions Pending Review and Approval](#)
- [Filter Requisition Approvals](#)
- [Assigning Requisitions to Myself](#)
- [Adding Comments and Attachments](#)
- [Approving a Requisition](#)
- [Returning a Requisition](#)

Process Steps:

Step	Action	Screenshot																																										
Accessing Requisitions Pending Review and Approval																																												
1	<p>If someone is assigning requisitions to you, or you only want to see the ones you have assigned to yourself, click on the Action Items (📌) flag and select Requisitions to Approve under the My Assigned Approvals section. There are 2 in this example.</p> <p>Note: To see all of the shared requisitions waiting to be assigned to an Approver, click on Requisitions under the Unassigned Approvals section.</p> <p>The My PR Approvals folder will appear with all of the requisitions that have been assigned to you.</p>	 <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 5%;">REQUISITION NO.</th> <th style="width: 20%;">SUPPLIERS</th> <th style="width: 20%;">ASSIGNED APPROVER</th> <th style="width: 15%;">PR DATE/TIME</th> <th style="width: 15%;">REQUESTER</th> <th style="width: 25%;">AMOUNT</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 2110185</td> <td>Dell Marketing LP</td> <td>Jeremiah Macht</td> <td>12/29/2017 12:17 PM</td> <td>Terri Richard</td> <td>10.00 USD</td> </tr> <tr> <td><input type="checkbox"/> 2095171</td> <td>Dell Marketing LP</td> <td>Jeremiah Macht</td> <td>12/13/2017 12:50 PM</td> <td>Rachel Requestor</td> <td>8,068.59 USD</td> </tr> <tr> <td colspan="6" style="text-align: center;">> ACCOUNT: 1001 (OFFICE SUPPLIES): (ALL VALUES) 7</td> </tr> <tr> <th style="width: 5%;">REQUISITION NO.</th> <th style="width: 20%;">SUPPLIERS</th> <th style="width: 20%;">ASSIGNED APPROVER</th> <th style="width: 15%;">PR DATE/TIME</th> <th style="width: 15%;">REQUESTER</th> <th style="width: 25%;">AMOUNT</th> </tr> <tr> <td><input type="checkbox"/> 3019591</td> <td>Mansfield Supply Inc</td> <td>Not Assigned</td> <td>7/22/2020 3:59 PM</td> <td>Nancy Patrylak</td> <td>100.00 USD</td> </tr> <tr> <td><input type="checkbox"/> 3017052</td> <td>Presto Print II Inc</td> <td>Not Assigned</td> <td>7/20/2020 3:04</td> <td>Nancy Patrylak</td> <td>500.00 USD</td> </tr> </tbody> </table>	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUESTER	AMOUNT	<input type="checkbox"/> 2110185	Dell Marketing LP	Jeremiah Macht	12/29/2017 12:17 PM	Terri Richard	10.00 USD	<input type="checkbox"/> 2095171	Dell Marketing LP	Jeremiah Macht	12/13/2017 12:50 PM	Rachel Requestor	8,068.59 USD	> ACCOUNT: 1001 (OFFICE SUPPLIES): (ALL VALUES) 7						REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUESTER	AMOUNT	<input type="checkbox"/> 3019591	Mansfield Supply Inc	Not Assigned	7/22/2020 3:59 PM	Nancy Patrylak	100.00 USD	<input type="checkbox"/> 3017052	Presto Print II Inc	Not Assigned	7/20/2020 3:04	Nancy Patrylak	500.00 USD
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2	<p>Another way to get to your requisitions is by using the icons on the left. Navigate to Orders > Approvals > Requisitions to Approve.</p> <p>This method will show ALL of the documents that need to be approved. Click on the Document Type horizontal list at the top of the Approvals screen and select <u>Requisitions</u>.</p> <p>Note: You can also use this method to see purchase order, invoices, or forms that need approval.</p>	
3	<p>Click on the arrow next to each folder to open it up.</p> <p>▼ MY PR APPROVALS 3</p> <p>Additionally, you can display how many documents you would like to see in each folder at once.</p>	
<p>Filter Requisition Approvals</p>		
1	<p>Additional filter options are also available in the left Filter bar and can filter by:</p> <ul style="list-style-type: none"> Type Date Range Supplier Supplier Class Department Current Workflow Step Status Flags Assigned Approver <p>And many more.</p>	

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1	<p>The folders on the right side contain all of the requisitions that need to be approved. They are shared with all of the approvers and delegates.</p> <p>The top folder, My PR Approvals, contains the requisitions that belong to you. Clicking on the Assign button assigns the requisition to your folder for approval.</p> <p>Note: After assigning the shared requisition to yourself no one else can take it unless you return it to the shared folder.</p> <p>You have just added the shared requisition to your My PR Approvals folder.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>REQUISITION NO.</th> <th>SUPPLIERS</th> <th>ASSIGNED APPROVER</th> <th>PR DATE/TIME</th> <th>REQUESTER</th> <th>AMOUNT</th> </tr> </thead> <tbody> <tr> <td>2110185</td> <td>Dell Marketing LP</td> <td>Jeremiah Macht</td> <td>12/29/2017 12:17 PM</td> <td>Terri Richard</td> <td>10.00 USD</td> </tr> <tr> <td>2095171</td> <td>Dell Marketing LP</td> <td>Jeremiah Macht</td> <td>12/13/2017 12:50 PM</td> <td>Rachel Requestor</td> <td>8,068.59 USD</td> </tr> <tr> <td colspan="6">ACCOUNT: 1001 (OFFICE SUPPLIES): (ALL VALUES)</td> </tr> <tr> <th>REQUISITION NO.</th> <th>SUPPLIERS</th> <th>ASSIGNED APPROVER</th> <th>PR DATE/TIME</th> <th>REQUESTER</th> <th>AMOUNT</th> </tr> <tr> <td>3019591</td> <td>Mansfield Supply Incc</td> <td>Not Assigned</td> <td>7/22/2020 3:59 PM</td> <td>Nancy Patrylak</td> <td>100.00 USD</td> </tr> <tr> <td>3017052</td> <td>Presto Print II Inc</td> <td>Not Assigned</td> <td>7/20/2020 3:04 PM</td> <td>Nancy Patrylak</td> <td>500.00 USD</td> </tr> </tbody> </table>	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUESTER	AMOUNT	2110185	Dell Marketing LP	Jeremiah Macht	12/29/2017 12:17 PM	Terri Richard	10.00 USD	2095171	Dell Marketing LP	Jeremiah Macht	12/13/2017 12:50 PM	Rachel Requestor	8,068.59 USD	ACCOUNT: 1001 (OFFICE SUPPLIES): (ALL VALUES)						REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUESTER	AMOUNT	3019591	Mansfield Supply Incc	Not Assigned	7/22/2020 3:59 PM	Nancy Patrylak	100.00 USD	3017052	Presto Print II Inc	Not Assigned	7/20/2020 3:04 PM	Nancy Patrylak	500.00 USD
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2	<p>From the My PR Approvals folder, you also have the following options on selected requisitions. You can...</p> <ul style="list-style-type: none"> • Forward... • Return to Shared Folder • Place on Hold • Add Notes to History <p>Once you select the check box you will see the ITEMS SELECTED menu appear at the bottom of the screen</p> <p>When you are ready to look at a requisition, select the requisition number.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>REQUISITION NO.</th> <th>SUPPLIERS</th> <th>ASSIGNED APPROVER</th> <th>PR DATE/TIME</th> <th>REQUESTER</th> <th>AMOUNT</th> </tr> </thead> <tbody> <tr> <td>3019591</td> <td>Mansfield Supply Incc</td> <td>Jeremiah Macht</td> <td>7/22/2020 3:59 PM</td> <td>Nancy Patrylak</td> <td>100.00 USD</td> </tr> <tr> <td>2110185</td> <td>Dell Marketing LP</td> <td>Jeremiah Macht</td> <td>12/29/2017 12:17 PM</td> <td>Terri Richard</td> <td>10.00 USD</td> </tr> <tr> <td>2095171</td> <td>Dell Marketing LP</td> <td>Jeremiah Macht</td> <td>12/13/2017 12:50 PM</td> <td>Rachel Requestor</td> <td>8,068.59 USD</td> </tr> </tbody> </table>	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUESTER	AMOUNT	3019591	Mansfield Supply Incc	Jeremiah Macht	7/22/2020 3:59 PM	Nancy Patrylak	100.00 USD	2110185	Dell Marketing LP	Jeremiah Macht	12/29/2017 12:17 PM	Terri Richard	10.00 USD	2095171	Dell Marketing LP	Jeremiah Macht	12/13/2017 12:50 PM	Rachel Requestor	8,068.59 USD																		
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Adding Comments and Attachments		
<p>1</p> <p>In the requisition, navigate to the Comments tab.</p> <p>Select the plus icon +</p> <p>Enter comment. Select individuals <input checked="" type="checkbox"/> to receive the comment via email.</p> <p>If the individual, you wish to select is not listed select Add recipient.</p> <p>Within the User Search window, search for the recipient.</p> <p>Once you've added a comment and selected email recipient(s) click the check mark in the top right of the Add Comment window.</p> <p><i>Comments can also be added, by using the Document Available Actions drop-down menu.</i></p> <p>✓</p>		

Step	Action	Screenshot
2	<p>From the Add Comment window, you can also Add an attachment.</p> <p>Select Choose File within the Attach File section. Browse and select the file.</p> <p>Then, select the check mark in the top right of the Add Comment window.</p> <p>In addition, you can attach a file by navigating within the Requisition Summary tab and scrolling down to find the Add Attachment buttons.</p> <p>You can add attachments in two places:</p> <p>Internal: For comments and attachments that you do NOT want to go to the supplier.</p> <p>External: For comments and attachments that are also available to suppliers.</p> <p><i>Note: Attachments cannot be added to documents once they have completed the approval workflow.</i></p>	

Approving a Requisition

1	<p>Review the requisition to ensure transaction is ok to approve.</p> <p>Here you have two options to approve</p> <ol style="list-style-type: none"> 1. Navigate to Available Actions drop down menu (3 dots). 2. Navigate to the upper right corner and select from the Approve/Complete Step Menu. 	
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2	<p>In addition, you can approve a requisition, by clicking the Approve button ✓ within the list of Approvals from your My Approvals folder.</p>	<table border="1"> <thead> <tr> <th>REQUISITION NO.</th> <th>SUPPLIERS</th> <th>ASSIGNED APPROVER</th> <th>PR DATE/TIME</th> <th>REQUESTER</th> <th>AMOUNT</th> <th></th> </tr> </thead> <tbody> <tr> <td>3019591</td> <td>Mansfield Supply Inc</td> <td>Jeremiah Macht</td> <td>7/22/2020 3:59 PM</td> <td>Nancy Patrylak</td> <td>100.00 USD</td> <td>✎ 🗑️ ✓</td> </tr> <tr> <td>2110185</td> <td>Dell Marketing LP</td> <td>Jeremiah Macht</td> <td>12/29/2017 12:17 PM</td> <td>Terri Richard</td> <td>10.00 USD</td> <td>✎ 🗑️ ✓</td> </tr> <tr> <td>2095171</td> <td>Dell Marketing LP</td> <td>Jeremiah Macht</td> <td>12/13/2017 12:50 PM</td> <td>Rachel Requestor</td> <td>8,068.59 USD</td> <td>✎ 🗑️ ✓</td> </tr> </tbody> </table>	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUESTER	AMOUNT		3019591	Mansfield Supply Inc	Jeremiah Macht	7/22/2020 3:59 PM	Nancy Patrylak	100.00 USD	✎ 🗑️ ✓	2110185	Dell Marketing LP	Jeremiah Macht	12/29/2017 12:17 PM	Terri Richard	10.00 USD	✎ 🗑️ ✓	2095171	Dell Marketing LP	Jeremiah Macht	12/13/2017 12:50 PM	Rachel Requestor	8,068.59 USD	✎ 🗑️ ✓
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Returning a Requisition

1	<p>In the requisition, navigate to the Document Available Actions drop-down menu.</p> <p>From Available Actions, select Return to Requester.</p> <p>You will be prompted to enter a Reason for return.</p> <p>Click Save Changes.</p>	<p>Return To Requester</p> <p>1000 characters remaining expand clear</p> <p>Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.</p> <p>Save Changes Cancel</p>
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