Approve or Deny a Requisition

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Your BFS Home page and Menu may appear different, depending on your user access and assigned roles in BFS. To navigate, you can select Worklist from the main menu on the left or the Worklist link at the top of the page. In this lesson, we will use the Worklist link at the top of the page. Click the Worklist link.</td>
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<tr>
<td>2.</td>
<td>Your Worklist page appears and displays all items assigned to you. The display view is limited to 100 items; when more than 100, you should use the filter to reduce the display list. Filtering by Doc Type is a Best Practice. Customize Worklist Display: Each user may have a different Worklist display preference depending on the types of approvals they are assigned. Data fields on the three tabs can be relocated/rearranged using the 'customize' feature; for example, many users prefer to have Vendor show on the first tab. See the 'Customize Worklist' lesson in the Voucher Approval section.</td>
</tr>
<tr>
<td>3.</td>
<td>In this lesson, we will filter for Requisitions to approve. Click the Doc Type drop down button to activate the menu.</td>
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<tr>
<td>4.</td>
<td>In this lesson, you want to select Requisitions for approval. (You can also refine the filter by adding other selections. For example, selecting &quot;From&quot; allows you to also filter by Preparer employee name.) Click the Requisition list item.</td>
</tr>
<tr>
<td>5.</td>
<td>To activate the Filter selection, you must click on the Worklist link again! Click the Worklist link.</td>
</tr>
<tr>
<td>6.</td>
<td>The Requisitions available for review and approval are now displayed. Notice the original list of 55 items has been reduced to 4 Requisitions.</td>
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| 7.   | You can select any **Requisition** displayed, however, we will open the first **Requisition** in the list for review and approval.  

**Note:** Selecting the first one allows you to use the **Next in List** button at the bottom of the page to navigate to the remaining **Requisitions** in the list without returning to the **Search** list. |
|      | Click the first **Requisition 0, 10000, 2000001339, PHYSI, 13050 19900** link. |


**Note:**  
> The **Line Details** needs to be opened to see the data.  
> A 'split distribution' (multiple chartstrings for a line item) may not display the split %, quantity or $ amount for each chartstring; you would use the **View Printable Requisition** button to confirm that data.  |
|      | The **Requester**, **Approval Status (In Process)**, **Approver Action (ApprAct)** and **Line Distributions** display.  

| 9.   | Click the **Expand section** arrow to view the **Line Details** information.  

| 10.  | Notice that the **Line Details** has expanded to include the **Amount**, **Quantity** (**Req Qty**) and **Unit of Measure** along with a **Details Tab**..  

| 11.  | To see line item **Details**, navigate to the tab.  

Alternatively, you can use the 'Show all columns" button to merge data from both tabs.  

|      | Click the **Details** tab. |

| 12.  | The **Details** tab displays the item **Description** and also identifies the **Buyer Type** of order (displays type or the specific Buyer's ID).  

| 13.  | Reminder: when needed, you can use the **View Printable Req** button to see the actual **Requisition**.  

You have reviewed all data for this requisition and confirmed the chartstring.  
You are now ready to **APPROVE** or **DENY** this **Requisition**.  

| 14.  | If you are going to **Approve**, you will leave the defaulted action of ‘Approve’ as displayed.  

IF you wish to **Deny** this Requisition, you will change the **Appr Act** selection to **Deny**.  

|      | Click the **Appr Act** list. |
### Step 15
Before we complete Approval for this Requisition, we will now explore how to record a **Deny** action.

Click the **Deny** list item.

### Step 16
When you **DENY** a **Requisition**, you should ALWAYS include a comment which will be emailed to the **Requisition Preparer** with the reason for denial and instructions to make necessary corrections.

Note the **Spell Checker** button on the right to check your text for spelling errors.

Enter the deny comment "Fund 19900 is incorrect for this Requisition, please correct Fund to 19950".

Note: When the **Deny** action and comment is **SAVED**, the comment is sent via email back to the **Requisition Preparer** for action.

### Step 17
Returning to the scenario in this lesson, we are going to **Approve** this **Requisition** that was selected from our **Worklist**.

(Note, the previous denial comment has been eliminated and we have returned to the **Approve** action.)

Click the **Approve** list item.

### Step 18
You have reviewed all data for this requisition and confirmed the chartstring and are ready to **Approve** it.

Click the **Save** button.

### Step 19
Notice the **Approval Status** is now "**Complete**".

After approval, **Requisitions** are dispatched as **Purchase Orders** several times each business day. The PO is dispatched electronically to the vendor.

### Step 20
To continue review of **Requisition** items in your **Worklist**, you can use the **Next in Worklist** button.

### Step 21
The next **Requisition 2000001375** in your **Worklist** is now displayed and is ready for approval action.

### Step 22
Click the **Home** link to return to the **Main Menu** to do other BFS work once you have completed your **Worklist** reviews.

### Step 23
**Congratulations**, you have now completed the **Approve or Deny Requisitions** lesson. **End of Procedure.**