

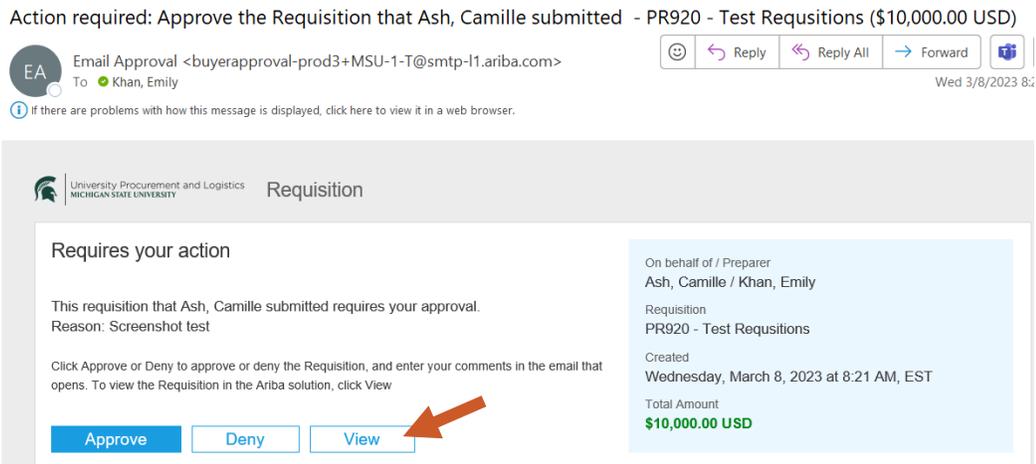


## Taking Actions on Purchase Requisitions (PRs)

**Overview:** This tutorial provides detailed guidance on how fiscal officers (FOs) and ad hoc approvers can approve or deny a purchase requisition (PR). If approved, the PR will advance to Procurement and central approvers for further action.

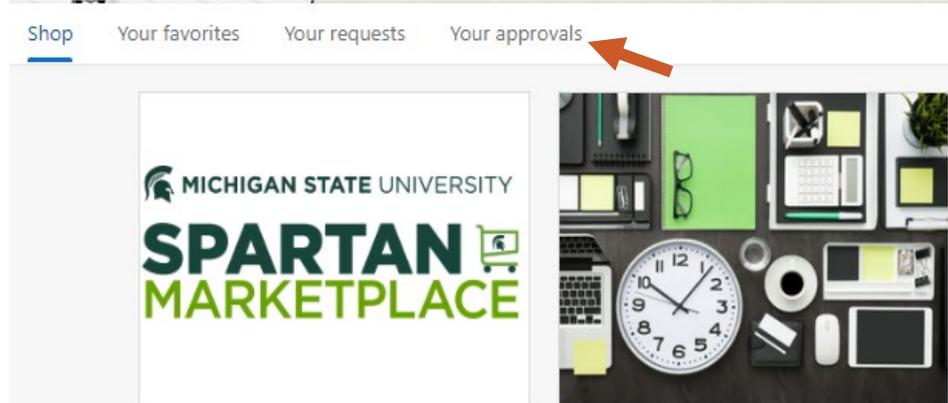
### Method 1: Accessing a PR via email notification

1. Fiscal officers and ad hoc approvers will receive an email requesting action on a purchase requisition (PR). Select the **View** button to view the details of the PR.



### Method 2: Accessing a PR via Guided Buying

1. Log in to [ubs.msu.edu](https://ubs.msu.edu) and click the **Procure-to-Pay System** tile.
2. Select the **Your approvals** tab from the top navigation.



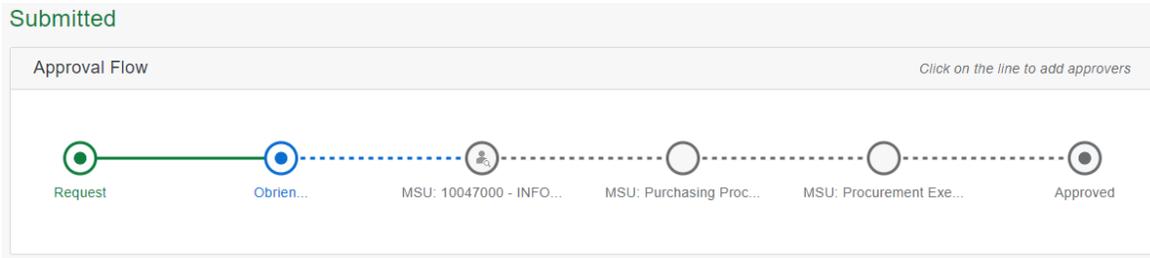
3. Select the See details button on the desired PR and proceed to the next section of tutorial instructions.





## Review the PR

1. Once in the PR, you will see the Approval Flow, any comments or attachments added by the requestor or prior approvers, header and line-item details, and document history.
  - a. Add additional watchers or approvers to the **Approval Flow** by clicking the dashed lines.
    - i. **Note:** this does not adjust accounting string information. To add another fiscal officer's account, follow the directions in step 2 to correct accounting information and add the FO to the approval flow.



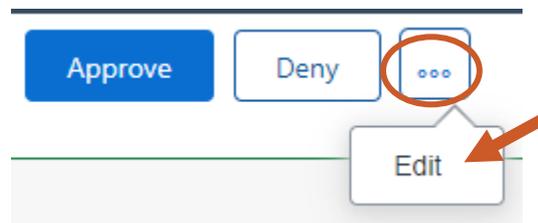
- b. Click the **Show advanced options** link under the header information to see the delivery details.

Ship to	Charge to	Total Cost	<b>\$2,250.00 USD</b>
ANGELL BLDG EAST LANSING, MI 48824 United States	Organization (10074876: UPL ADMINISTRATION)		
<a href="#">Show advanced options</a>			

- c. The arrow next to each line item expands the display of product information, including the accounting string.

Items (1)			
	Quantity	Price	Amount
Emily Khan (no value)	150	\$15.00 USD	\$2,250.00 USD
	Unit of Measure		
	each		

2. To edit, click ... next to the **Deny** button and select **Edit** from the dropdown menu. Optionally, you can add a comment at this time.



- a. All fields the requester edited are also available to approvers for editing, including accounting string information.



- i. Accounting can be split by clicking the **Split accounting** link.
  - 1. **Note:** Fiscal officers will not be able to edit any accounting string information for accounts that they do not manage. If charges need to be changed or split between one or more accounts not currently managed by the fiscal officer approving the PR, the best practice is to reject the PR with comments to the requestor to make the necessary corrections.

Project Code  
(no value) [v]

[Split accounting](#)

- a. Add any comments or attachments needed. Fiscal officers are **required** to add a comment if the account(s) used are federally funded that indicates the account's **Source of Funds Code**.

Comments

Write your comment...  Share with supplier

Attachments

Drag and drop file here, or [browse](#) to upload, then click the Add button.  Share with supplier

- b. Click the **Update request** in the upper right corner. This must be selected to regenerate the approval flow.

- c. Click **View requisition** to re-enter the requisition for approval or denial.

Success ×

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The requisition has been updated.

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- 3. **Approve** or **Deny** the purchase requisition using the buttons along the top.

...



- Regardless of the selected action, a pop-up will appear, providing a space for comments.
  - Comments are optional for approvals but are required for denial of a PR.

Approve request	Deny request
<p>Enter an optional comment for the requester.</p> <input type="text"/>	<p>Explain to the requester and other approvers why you're denying this request. *</p> <p>Fill in this field in order to proceed.</p> <input type="text"/>
<p><input type="button" value="Cancel"/> <input type="button" value="Approve"/></p>	<p><input type="button" value="Deny"/> <input type="button" value="Cancel"/></p>

- After comments are added, click **Approve** or **Deny**.
- The PR will continue to route via the Approval Flow.