

Job Aids

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.

Action required: Approve the Requisition that Ash, Camille submitted - PR920 - Test Requsitions (\$10,000.00 USD) 🙂 🔶 Reply 🖉 Reply All → Forward Email Approval

buyerapproval-prod3+MSU-1-T@smtp-l1.ariba.com> To 🛛 Schan, Emily Wed 3/8/2023 8:2 () If there are problems with how this message is displayed, click here to view it in a web browser. MICHIGAN STATE UNIVERSITY Requisition Requires your action On behalf of / Prepare Ash, Camille / Khan, Emily This requisition that Ash, Camille submitted requires your approval. Requisition Reason: Screenshot test PR920 - Test Regusitions Created Click Approve or Deny to approve or deny the Requisition, and enter your comments in the email that Wednesday, March 8, 2023 at 8:21 AM, EST opens. To view the Requisition in the Ariba solution, click View Total Amoun \$10,000.00 USD Approve Deny View

Method 2: Accessing a PR via Guided Buying

- 1. Log in to ebs.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.



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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.

Submitted					
Approval Flow				Click on the li	ne to add approvers
Request	Obrien	MSU: 10047000 - INFO	MSU: Purchasing Proc	MSU: Procurement Exe	Approved

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

Ship to	Charge to	Total Cost	\$2,250.00 USD
ANGELL BLDG EAST LANSING, MI 48824 United States	Organization (10074876: UPL ADMINISTRATION)		
	✓ Show advanced options		

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

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

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.

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- i. Accounting can be split by clicking the **Split accounting** link.
 - 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)	\sim
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	Add
Attachments		
Drag and drop file here, or browse to upload, then click the Add button.	Share with supplier	Add

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	×
	The requisition has been updated.	
		ew requisition
Approve or Deny	the purchase requisition using the buttons along the top.	
Approve or Deny	the purchase requisition using the buttons along the top. Approve Deny ••••	
. Approve or Deny	the purchase requisition using the buttons along the top. Approve Deny •••	
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- 4. Regardless of the selected action, a pop-up will appear, providing a space for comments.
 - a. Comments are optional for approvals but are required for denial of a PR.

Approve request	×	Deny request
Enter an optional comment for the requester.		Explain to the requester and other approvers why you're denying this request. * Fill in this field in order to proceed.
Cancel Approve		Deny Cancel

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

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