



Approving an eRequisition

The approval process for NC E-Procurement allows the appropriate personnel to approve, edit, or deny items that have been requested in NC E-Procurement. Each eRequisition must be fully approved within NC E-Procurement before the purchase order is generated and sent to the supplier. The approval flow for each user may differ based on the user's management level and supervisor. For more information on how approval flows are generated, please refer to the Approval Flow Process Guide. .

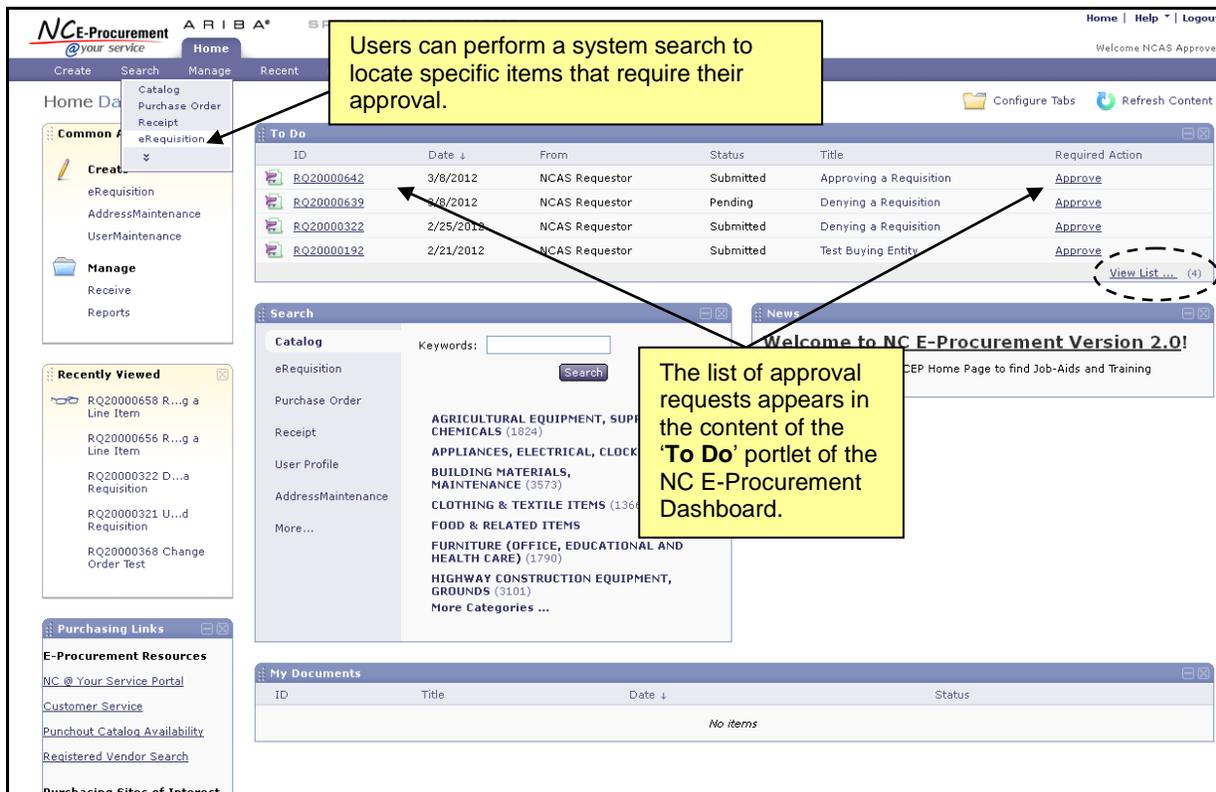
Approvers may set their NC E-Procurement e-mail preferences to receive an e-mail notification each time an eRequisition is sent to them for approval. This e-mail serves as a notification only. The requests will appear in the Approval Requests label even if the approver elects not to receive the notification. For more information regarding email notifications please refer to the 'Edit Email Notification Preferences' process guide.

The items that appear in the 'To Do' portlet on the Ariba Dashboard are approvable items that require the action of the user that is currently logged in. The required action is displayed on the right side of the portlet.

1. Click the eRequisition 'ID' or the 'Approve' link from the 'To Do' portlet on the Ariba Dashboard. Users can also search the system for the requisition number to approve awaiting requests.

Note: If 'Approve' is clicked instead of the eRequisition ID, only basic requisition details, such as Line Item Description, Quantity, Price, and Total Amount, will be visible. The approval flow for the item will also be visible. To view additional details on the requisition before approving, click the eRequisition 'ID' from the 'To Do' portlet.

Note: The 'View List' link will display the number of eRequisitions awaiting approval.



The screenshot shows the NCE-Procurement Ariba dashboard. The 'To Do' portlet is highlighted with a yellow box and contains the following table:

ID	Date ↓	From	Status	Title	Required Action
RQ20000642	3/8/2012	NCAS Requestor	Submitted	Approving a Requisition	Approve
RQ20000639	3/8/2012	NCAS Requestor	Pending	Denying a Requisition	Approve
RQ20000322	2/25/2012	NCAS Requestor	Submitted	Denying a Requisition	Approve
RQ20000192	2/21/2012	NCAS Requestor	Submitted	Test Buying Entity	Approve

Below the 'To Do' portlet is a search section with a 'Catalog' dropdown and a search bar. The search results show a list of categories:

- AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (1824)
- APPLIANCES, ELECTRICAL, CLOCK & TIMEPIECES (1366)
- BUILDING MATERIALS, MAINTENANCE (3573)
- CLOTHING & TEXTILE ITEMS (1366)
- FOOD & RELATED ITEMS (1366)
- FURNITURE (OFFICE, EDUCATIONAL AND HEALTH CARE) (1790)
- HIGHWAY CONSTRUCTION EQUIPMENT, TRUCKS & TRAILERS (3101)
- More Categories ...

Two yellow callout boxes provide additional information:

- One box points to the search bar with the text: "Users can perform a system search to locate specific items that require their approval."
- Another box points to the 'To Do' table with the text: "The list of approval requests appears in the content of the 'To Do' portlet of the NC E-Procurement Dashboard."



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2. Review details and click the **'Approve'** button if the eRequisition is correct.

Note: Users with the necessary permission can also edit the eRequisition during the approval process. This includes updating line items and adding comments and attachments. For more details regarding this process, reference the 'Editing a Line Item as an Approver' Process Guide.

Note: To view the eRequisition's progress through the approval flow, click the **'Approval Flow'** tab.

The screenshot displays the NCE-Procurement interface for approving a requisition. The page title is "RQ20000642 - Approving a Requisition" with a status of "Submitted". The navigation bar includes "Home", "Help", and "Logout". The main content area shows a summary of the requisition details, including the title "Approving a Requisition", pre-encumbrance status "Pre Encumbered", and buying entity "41EG". A table of line items is shown with one item: "Aerator / 19\" Honda GX 120 3.5 HP" with a quantity of 3 and a total cost of \$7,523.88000 USD. The page also includes sections for shipping, comments, and attachments. Annotations highlight the "Approve" button, the "Detail" button for a line item, and the "Add Comment" and "Add Attachment" buttons.

Click 'Detail' to view more information for the line item.

Insert comments or attach files.



3. Once the user clicks **'Approve,'** the **'Approve- Comments'** page will appear. Add any necessary comments and click **'OK.'**

Note: eRequisitions are automatically moved to the Archive label after being approved unless another label is selected. To change the label to which the item is assigned, use the dropdown box beside 'Archive item(s) to label' and choose the appropriate label. For more information about Labels, reference the 'Personal Labels' process guide.

Note for NCAS users: Once all required approvers have approved the eRequisition, the eRequisition will become a purchase order and is automatically sent to the supplier. The status of the eRequisition and purchase order will be **'Ordered.'**

Note for School System and Community College users: Once all required approvers have approved the eRequisition, the eRequisition is then sent to the appropriate financial system (e.g., Sunpac, ISIS, or Colleague) for further processing. The status of the eRequisition will be **'Approved'** and will **not** change.

The screenshot displays the 'Approve - Comments' interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Logout' options. Below this, a search bar and a list of menu items (Create, Search, Manage, Recent, Preferences) are visible. The main content area is titled 'Approve - Comments' and includes a text input field for comments. Below the text field, there are two checkboxes: 'Visible to Supplier' and 'Archive items to label'. The 'Archive items to label' dropdown menu is currently set to 'Archive Items'. At the bottom left, there are 'OK' and 'Cancel' buttons. Two yellow callout boxes with arrows point to the 'Visible to Supplier' checkbox and the 'Archive Items' dropdown menu, providing specific instructions for the user.