

Requisition Approval Guide

Approvals are Easy in UNT System Marketplace!

Approvers can review, approve, forward or return purchase requisitions. There are two different types of approvers, Department Approvers and Special Approvers.

Department Approvers: Department approvers approve on the behalf of the funding department. The department approver cannot be the Requestor who submitted the requisition.

Special Approvers: Requisitions route for approval based on rules that comply with UNT policies. These approvers may include Budget, CFO, Asset Management, IT Compliance, Risk Management, Grants, Project and others depending on the workflow.

Your Approval page will be customized based on your approval role. While the layout may be different, you will have many options for quickly approving Action Items!

Quick Search is also available should you need to find a specific requisition.

Action Items

Approvals

Requisitions To Approve → 2

Invoices 2

Change Request 1

Additional Approvals

Requisitions → 91

Invoices 28

Change Request 7

Approvals

Showing Results 1 - 29 of 29

200 Per Page ▾

| NUMBER | SUPPLIER NAME | FOLDER NAME | DAYS IN FOLDER ↑ |
|--------------------------|--------------------------|----------------------|------------------|
| JT001179 | Ben E Keith Company | 225020 | 0 |
| JT001167 | Henry Schein Inc | 960000 | 9 |
| JT001168 | Henry Schein Inc | 152070 | 9 |
| JT001157 | 308 Construction, LLC | 500400 | 22 |
| JT001108 | Cavallo Energy Texas LLC | 517000 | 90 |
| JT001102 | BSN Sports, LLC | 225020 | 99 |
| J0000876 | John L Bass OD PC | 225020 | 255 |
| J0000826 | Single | Department Catch-All | 276 |
| J0000817 | Intelli | Department Catch-All | 276 |
| J0000820 | 360 T | 925000 | 279 |
| J0000676 | Summus Industries, Inc | Department Catch-All | 344 |

You can click the hyperlink to access the requisition requiring your approval.

Month End Close Reminder

Month Close begins on 6/28. Please rememl

Action Items

APPROVALS

[Requisitions To Approve](#) 2

[Invoices](#) 2

[Change Request](#) 1

ADDITIONAL APPROVALS

[Requisitions](#) 91

[Invoices](#) 28

[Change Request](#) 7

Marketplace provides convenient access to Action Items.

- 1) In the top, right corner, the number of approvals waiting for your review is displayed on the Action Items (flag icon).
- 2) The Action Items are also on display on your approvals page.

Managing requisitions assigned for your review and approval is simple. Click the arrow button next to the “Assign to Myself.” Then select “Approve” or “Approve & Next.”

Requisition • 3740488

Summary Taxes/S&H PO Preview Comments 1 Attachments History

You are reviewing a requisition that has been resubmitted

General

Status **Pending**
Department Approval

Submitted 3/28/2023 8:55 AM

Cart Name 2023-03-28 hsrequestor01 01

Description *no value*

Business Unit UNT Health Science Center (HS763)

Accounting Date 3/28/2023

Shipping

Ship To

Deliver to: HS Requestor
Bldg/Rm: 'Deliver to:'
3420 Darcy St.
Fort Worth, TX 76107
United States

Delivery Options

Delivery Location 0211 103

Billing

Bill To

Email to: im
UNT System
1112 Dallas
Denton, TX
United States

Assign To Myself

- Assign to myself
- Approve & Next
- Approve

Approve/Complete & Show Next

- Approve & Next
- Approve
- Return to Shared Folder
- Return to Requisitioner
- Forward to ...
- Reject Requisition

Requisitions can be approved without assigning them to yourself. However, should you need to make edits, you will need to assign the requisition to yourself.

Summary

Total (160,000.00 USD)

Shipping, Handling, and Tax
by each supplier. The values
purposes, budget checking, and workflow approvals.

Summary

Pending

Total (160,000.00 USD)

1 of 2 Results

160,000.00
0.00
0.00
160,000.00

If you assign the requisition to yourself, you will notice other actions can be taken. By clicking the ellipses, a list of options will be available.

Requisition • 3740488

Summary Taxes/S&H PO Preview Comments 1 Attachments History

⚠ You are reviewing a requisition that has been resubmitted

General

Status Pending
Department Approval (Dept Approver)

Submitted 3/28/2023 8:55 AM

Cart Name 2023-03-28 hsrequestor01 01

Description *no value*

Business Unit UNT Health Science Center (HS763)

Accounting Date 3/28/2023

PR Override
Budget Date

Priority Normal

Prepared by ePro HS Requestor
Coordinator

Prepared for HS Requestor

Ad-Hoc Approver [Select](#)

Shipping

Ship To

Deliver to: HS Requestor
Bldg/Rm: 'Deliver to:'
3420 Darcy St.
Fort Worth, TX 76107
United States

Delivery Options

Delivery Location 0211 103
CENTER SILO

Requested Delivery Date *no value*

Expedite

Ship Via Best Carrier-Best Way

You can approve the requisition or "Approve & Next." By selecting approve & next, the next requisition pending your approval will be displayed.

You can return the req to the Requisitioner with notes about why it's being returned

Add comments or notes to the req

The req can be rejected, if needed. Rejected reqs cannot be resubmitted

- Approve & Next
 - Approve
 - Return to Shared Folder
 - Return to Requisitioner
 - Forward to ...
 - Copy to New Cart
 - Add Comment
 - Add Notes to History
 - Reject Requisition
- [View My Orders \(Last 90 Days\)](#)

Returning to Shared Folder will unassign the req from yourself

The requisition can be forwarded to another user for action

- Initial Validation Request
Completed
- Exception Approval
Approved
 Exception Approver
- Purchasing Review
Approved
 Buyer one
- Department Approval
Active
 Dept Approver

Requisition • 3740488

Approve/Complete & Show Next 1 of 2 Results

Summary Taxes/S&H PO Preview Comments 1 Attachments History

General

Status **Pending**
Department Approval (Dept Approver)

Submitted 3/28/2023 8:55 AM

Cart Name 2023-03-28 hsrequestor01 01

Description *no value*

Business Unit UNT Health Science Center (HS763)

Accounting Date 3/28/2023

PR Override Budget Date

Priority Normal

Prepared by ePro Coordinator HS Requestor

Prepared for HS Requestor

Ad-Hoc Approver [Select](#)

Shipping

Ship To
Deliver to: HS Requestor
Bldg/Rm: 'Deliver to:'
3420 Darcy St.
Fort Worth, TX 76107
United States

Delivery Options
Delivery Location 0211 103
CENTER SILO

Requested Delivery Date *no value*

Expedite

Ship Via Best Carrier-Best Way

Billing

Bill To
Email to: invoices@untsystem.edu
UNT System Business Service Center
1112 Dallas Dr. Ste. 4200
Denton, TX 76205
United States

Summary

Pending

Total (160,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

| | |
|--------------|-------------------|
| Subtotal | 160,000.00 |
| Shipping | 0.00 |
| Handling | 0.00 |
| Total | 160,000.00 |

What's next?

Workflow

- Submitted 3/28/2023 8:55 AM HS Requestor
- OFAC Check Completed
- Initial Validation Request Completed
- Exception Approval Approved

Once the necessary edits have been made, select the approve/complete button.

Edit General

General

Status **Pending**
Department Approval (Dept Approver)

Submitted 3/28/2023 8:55 AM

Cart Name

Description

Business Unit

Accounting Date
mm/dd/yyyy

PR Override Budget Date

Priority

Prepared by ePro Coordinator HS Requestor

Prepared for HS Requestor

As stated before, department approvers can click the green button to Assign to Myself. This allows the department approver to edit the form. For example, if you click the pencil icon in the General section, a popup allows you to make edits to those fields.

Return To Requisition ✕

1000 characters remaining expand | clear

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.

Save Changes Cancel

When selecting “Return to Requisitioner,” a window will pop up with a comment box. Here you will type the reason for the return.

Reject Requisition ✕

⚠ **WARNING:** You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click Reject Requisition or Cancel to leave the PR unchanged.

PR Reject Reason

1000 characters remaining expand | clear

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.

Reject Requisition Close

If you select “Reject Requisition,” you will need to provide a reason for rejecting it. Warning: rejecting makes the requisition unusable.

User Search ✕

Last Name ●

First Name ●

User Name ●

Email ●

Business Unit ● 🔍

Department ●

Role ●

Results Per Page ▼

Search Close

If “Forward to...” is selected, a window will popup and you will be able to search by first name, last name, email address or other options for marketplace users.

Related Documents

Purchase Order: DLT0000176

What's next?

Workflow

- Submitted
2/15/2024 3:16 PM
DL Requestor
- OFAC Check
Completed
- Initial Validation Request
Completed
- Exception Approval
Approved
✓ AM Approver
- Purchasing Review
Approved
✓ Buyer one
- Department Approval
Approved
✓ Buyer one
- Final Validation Request
Completed
- 2nd OFAC Check
Completed
- Create PO
Completed
- Completed
2/15/2024 3:19 PM

Once the requisition has acquired all necessary approvals and the workflow is complete, a Purchase Order number will be assigned.