

APPROVING ONLINE PURCHASE REQUISITIONS

Creating an Approval Password

MANDATORY STEP: In order to ensure security, Information Technologies requires approvers to immediately assign an approval password to their account. This procedure also can be used at any time to change an existing Approvals password.

Use the same naming convention (at least 8 characters in length and include 1 upper case letter and 1 digit) as your network password.

1. Type **APPW** (Approval Password maintenance) in Form Search
2. Type your **Colleague Username** (in CAPS) in the Approvals Lookup box and click **OK**



The screenshot shows a dialog box titled "Approvals LookUp". It contains a text input field with the text "JLANCER" entered. Below the input field are four buttons: "OK", "Cancel", "Finish", and "Help".

The "Enter the password for the approval ID..." dialog box displays.



The screenshot shows a dialog box with the text "Enter the password for the approval ID if you want security applied." Below the text is a password input field with ten dots. At the bottom are two buttons: "OK" and "Cancel".

3. Type the **Approval Password** that you would like to use and click **OK**
4. **Re-enter the Password** and click **OK**

You will be returned to the APPW Password Maintenance screen.



The screenshot shows a window titled "APPW - Approval Password Maintenance". The window has a menu bar with "File", "Options", and "Help". There are three buttons at the top: "Save", "Save All", and a close button. The main area contains three fields: "Approval ID" with the value "JLANCER", "Name" with the value "JOSEPH LANCER", and "Password" with an empty input field.

5. Click the **Save** button to save the approval password.

This step is extremely important to make certain the password is saved.

6. Click **Update** and click **OK**

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- All Purchase Requisitions need at least two approvals. For purchases under \$20,000, two approvals are required.
 1. Department Budget Manager
 2. Procurement Office Representative
- For purchases over \$20,000, the name of the Worcester State University Chief Financial Officer (e.g. K. Eithelroth) must be added as a third approval name.

Approving an Existing Purchase Requisition

Type **APRN** (approvals needed) in Form Search

Type your **Colleague Username** (Caps) in the Authorization Lookup dialog box and click **OK**

A Fiscal Year Lookup dialog box displays.

Type the **Fiscal Year** for the budget in which the purchase requisition was placed and click **OK**

If an approval password was created, the “Enter your approval password” dialog box displays.

If an approval password was not created, make certain to use APPW and create one.



Type your approval password and click **OK**.

NOTE: Providing a password helps ensure that only the authorized “approver” will be approving the purchase of the requested item(s). This is an added level of security.

Individual requisitions can be marked for approval by typing a **Y** in the Approve box to the right of the requisition and Pressing <Enter>:

APRN - Approvals Needed						
Approvals Needed From : [REDACTED]					Fiscal Year : 2016	
Approval Password [REDACTED]						
Type	Document ID	Name	Date	Net	Approve	
1	BE	B012083	[REDACTED]	03/31/16	0.00	No
2	REQ	0033307	Oaktree Products	04/01/16	190.00	No
3	REQ	0033306	Follett Higher Educat	04/01/16	500.00	Yes
4	REQ	0033305	Accium BioSciences, I	04/01/16	558.00	No

Other items, such as **Budget entry approvals or approvals created in a month that is now closed, require use of the Detail button**  in the desired row to open and view the Requisition Maintenance or other desired screen.

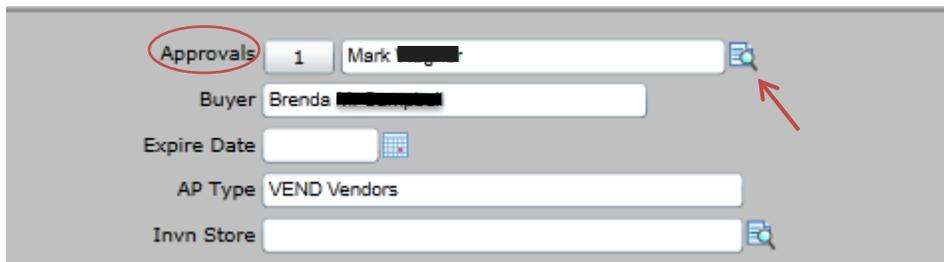
Requisitions created in a month that is closed display an alert message: ‘Transaction date is not in an open month. Detail to maintain’. Click OK after reading the alert message to proceed.

If you wish to review some line items or because the following Transaction date alert displays, proceed to steps A-E below to Detail in to review requisition line items individually before approving the requisition.



A. On APRN, click the **Detail** button  to open the item you wish to approve.

B. Click the Detail button to the right of the **Approvals** field/box.



C. In the first available box under **Approvals** (left-hand column on the APRV screen), type your **Colleague Username** and Press **<Enter>**. Enter your Approval Password.

Your approval name should move from the Next Approvals column to the Approvals column.

D. Click **Save and Update**.

E. Click **Save and Update** again, back to the APRN screen.

Once you have finished all of your approvals in APRN, click **Save and Update**, then **Finish**.