Approval Process: Requisitions
For users with Approver role

IMPORTANT NOTES
• Do not approve one line item and hold or send back another line item
• If one line item cannot be approved, the whole transaction must be sent back or placed on hold
  • If a line is ‘grayed out’ it does not need your approval

Step 1: Retrieve requisition
• Navigate to Approval Inbox on NU portal located at https://nuportal.northwestern.edu
• Click number associated with transaction type Requisitions
• Take note of Origin. If origin is SciQuest Orders, there can only be one ship to address per vendor
• Click on desired Requisition ID

Step 2: Review line item(s) for accuracy
• With all line items selected, click View Line Details
• A new browser window opens. Be sure to verify the following:
  ▶ Chart string is correct (Check Fund, Dept, Account, and if applicable, Project and Activity)
  ▶ Requisition has budget check status of Valid
  ▶ Requisition is consistent with NU purchasing policy, blankets in particular. Refer to Purchasing Resource Services website at http://www.northwestern.edu/uservices/purchasing
  ▶ Requisition contains appropriate attachments, if applicable (e.g., SSJ or other forms)
  ▶ Line items are all from the same origin (cannot mix catalog and non-catalog items in same requisition) How does Approver confirm this?
  ▶ Ship To – if origin code on previous screen is SciQuest, there can be only 1 ship to address per vendor
  ▶ Requisition has a vendor for each line item. A requisition may be submitted without a vendor, but should be sent back to be corrected and resubmitted.
  ▶ Quantity is appropriate
  ▶ Price is appropriate
• Close active browser window to return to approvals page

Step 3: Approve, Send Back, or Hold
Based on your evaluation of the transaction, select one of the following actions: Approve, Send Back, or Hold. Please refer to additional details about these actions on the next page.
**Approve**
Approve if all line items are correct, appropriate, and consistent with NU purchasing policy.
- Be sure that all line items are selected
- **Optional:** In Enter Approver Comments field, enter any necessary comments; your comments are seen by all subsequent levels of Approvers
- Click Approve
- Confirmation message displays
- Click Return to Workflow Inbox

⚠️ What happens next?
- Transaction is removed from your workflow inbox (and from any pooled approvers at your level)
- If there are additional levels of approval, requisition proceeds to next level
- System generates email notification to Requester when requisition is fully approved
- Upon final approval, requisition is automatically sourced into PO & dispatched to vendor

**Send Back**
Send back if there are errors or insufficiencies that should be corrected by Requester.
- Be sure that all line items are selected
- **Required:** In Enter Approver Comments field, enter specific reason(s) why requisition is not approved at this time; your comments are seen by all subsequent levels of Approvers
- Click Send Back

⚠️ What happens next?
- Requester receives email with Approver Comments about why transaction was sent back
- Approver is returned to their workflow inbox
- Transaction is removed from workflow inbox of any pooled approvers at the same level
- Requester modifies transaction and resubmits for approval (workflow is reinitiated from the beginning). Or, Requester may cancel requisition

**Hold**
Hold a transaction if further research is needed by Approver before making a decision. Transactions placed on hold are exempted from automatic 3-day timeout. When placed on hold, workflow is suspended indefinitely until Approver takes further action. Approver is responsible for timely management of requisitions placed on hold for further research.
- **Optional:** In Enter Approver Comments field, enter specific reason(s) why requisition is not approved at this time; your comments are seen by all subsequent levels of Approvers
- Click Hold

⚠️ What happens next?
- Transaction remains in Approver’s workflow inbox in Pending status
- Requester is not notified when a requisition is placed on hold
- Requester is responsible for tracking requisitions and determining how to best proceed if a requisition has not been approved in a timely manner (contact Approver or cancel transaction)