New York State Office of General Services
Business Services Center
Empire State Plaza
Albany, NY 12242
(Phone) 518-457-4272
(Fax) 518-486-9166

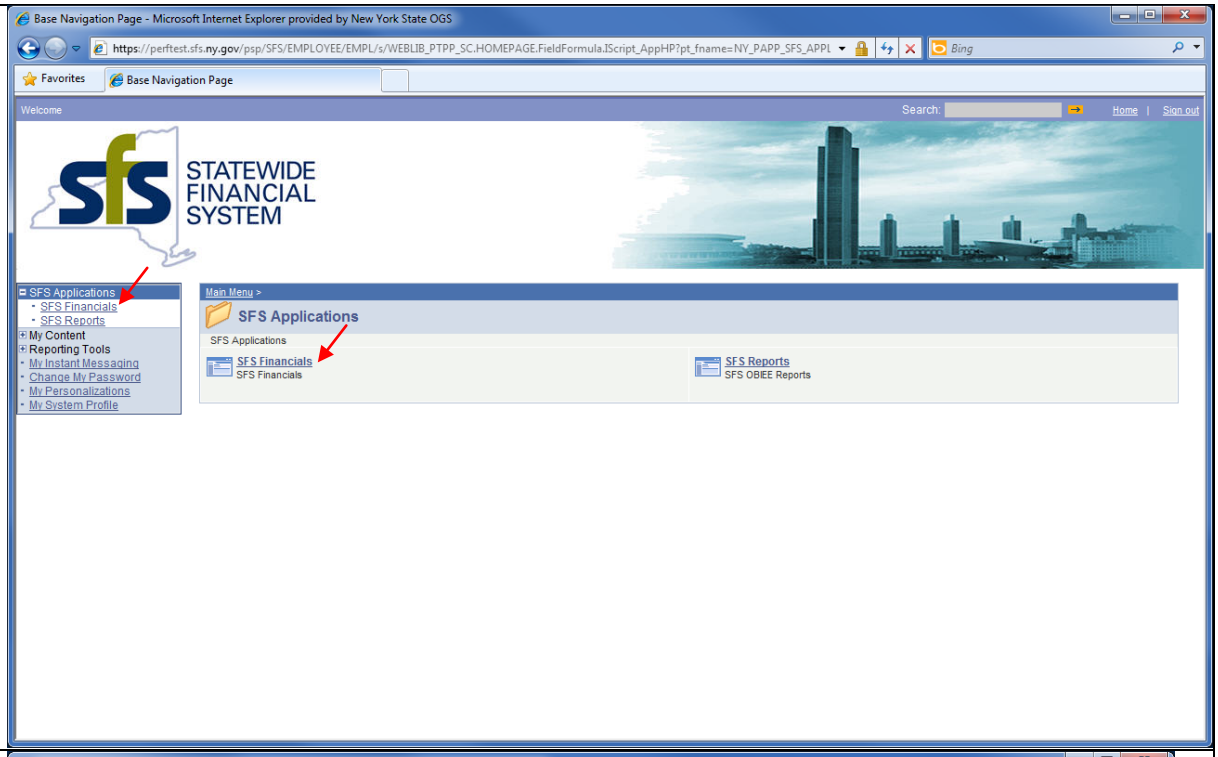
Approve a Requisition in SFS
Deny a Requisition in SFS

Submitted requisitions are forwarded to the supervisor for approval. The supervisor is responsible for reviewing the requisition for accuracy and appropriateness.

In this module you will learn how to approve or deny a requisition.

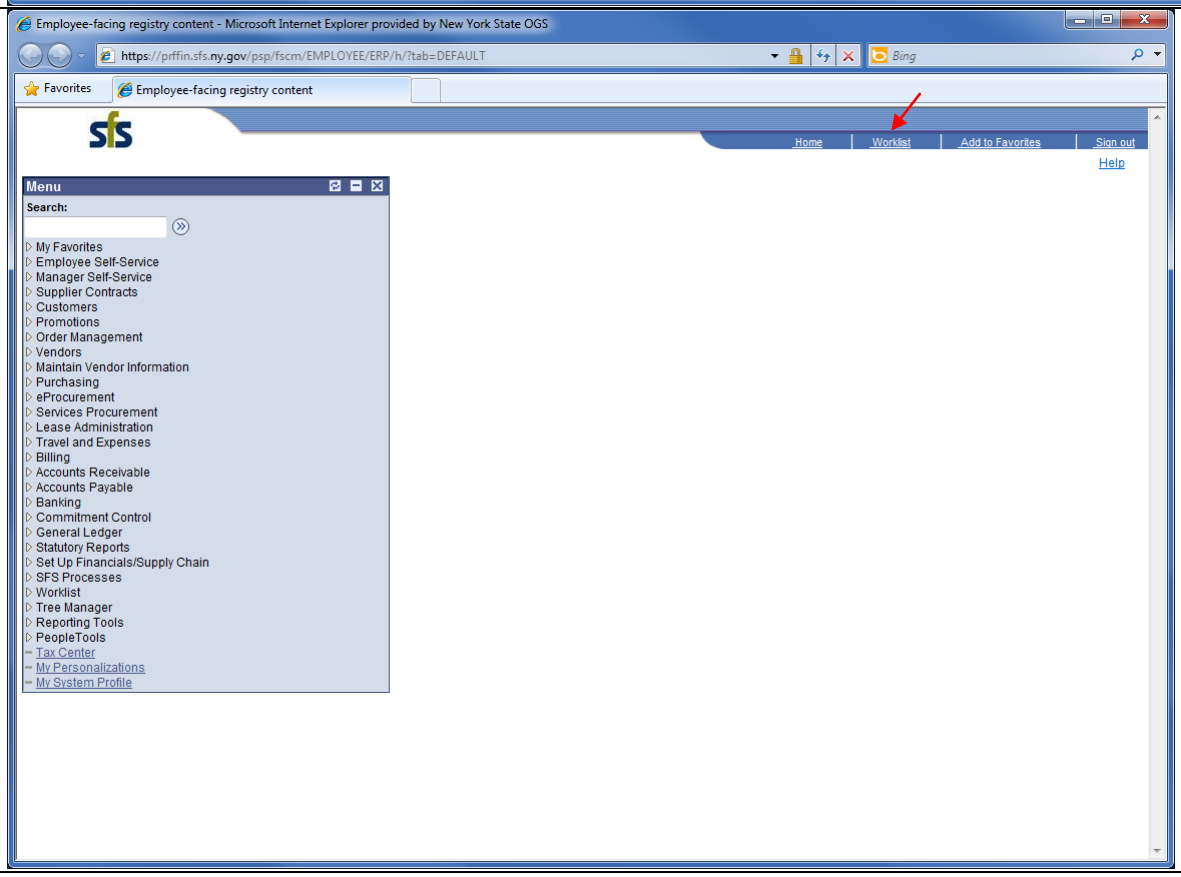
Click SFS Applications.

Next, click SFS Financials (either location).

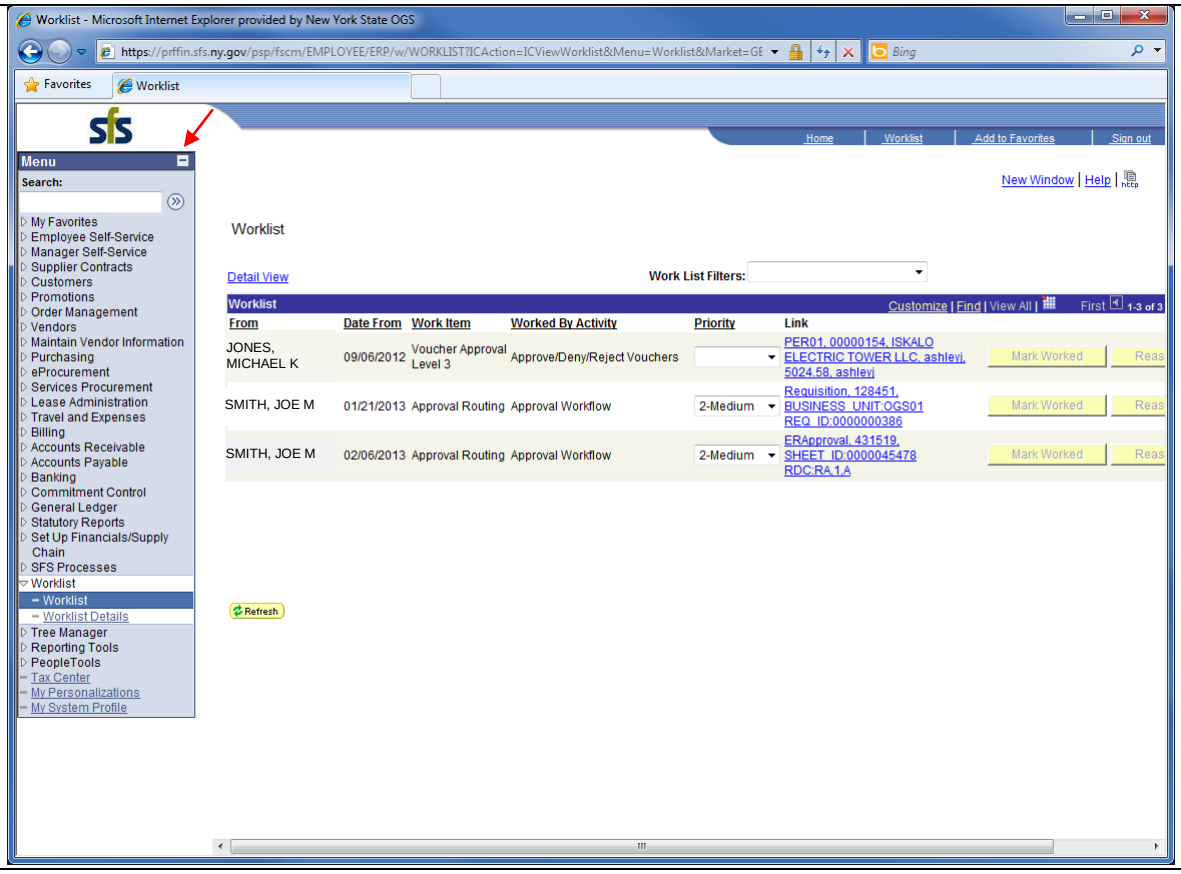


The Worklist page is used to view and take action on pending approvals routed through workflow.

Click Worklist.



Collapse the menu pagelet – Click the minimize button.



The Detail View shows the worklist in table format.

The **From** field shows the person who began the work item.

The **Date From** field shows the date the item was started.

The **Work Item** shows the status of the item.

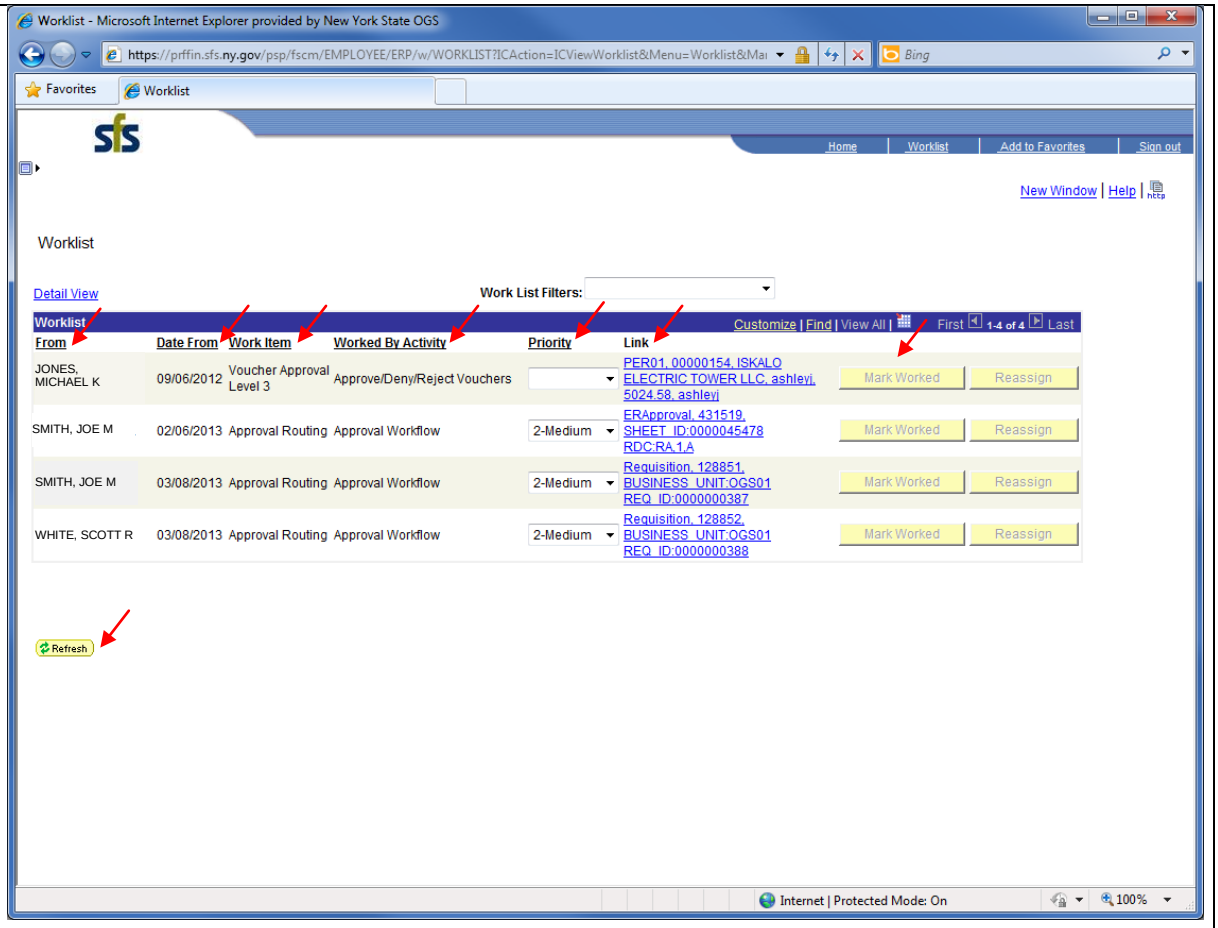
The **Worked By Activity** shows the next step in the process.

The **Priority** field shows the default.

The **Refresh** button can be used to update the page with the most recent changes.

The **Mark Worked** button is used to remove an item from the worklist. If it is greyed out, the work is still in process.

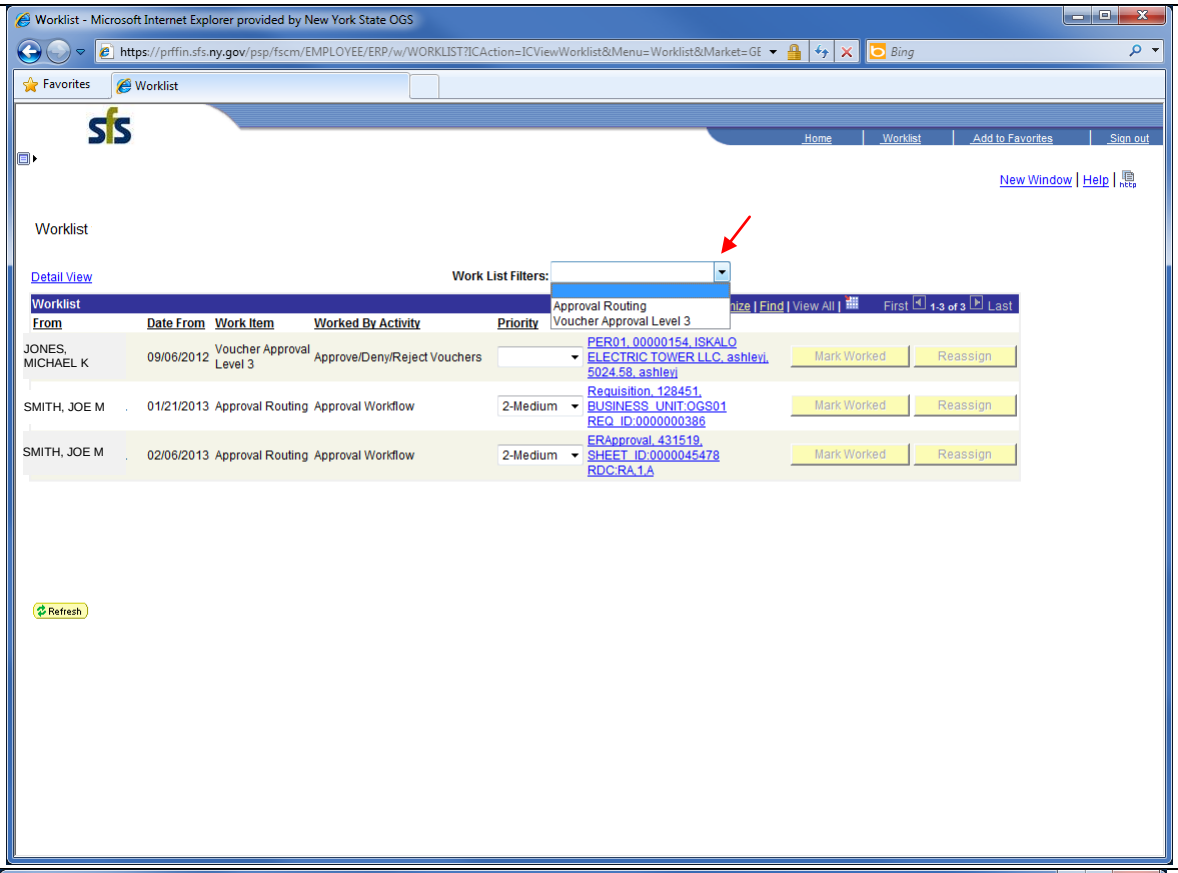
The **Link** opens the Requisition Approval page.



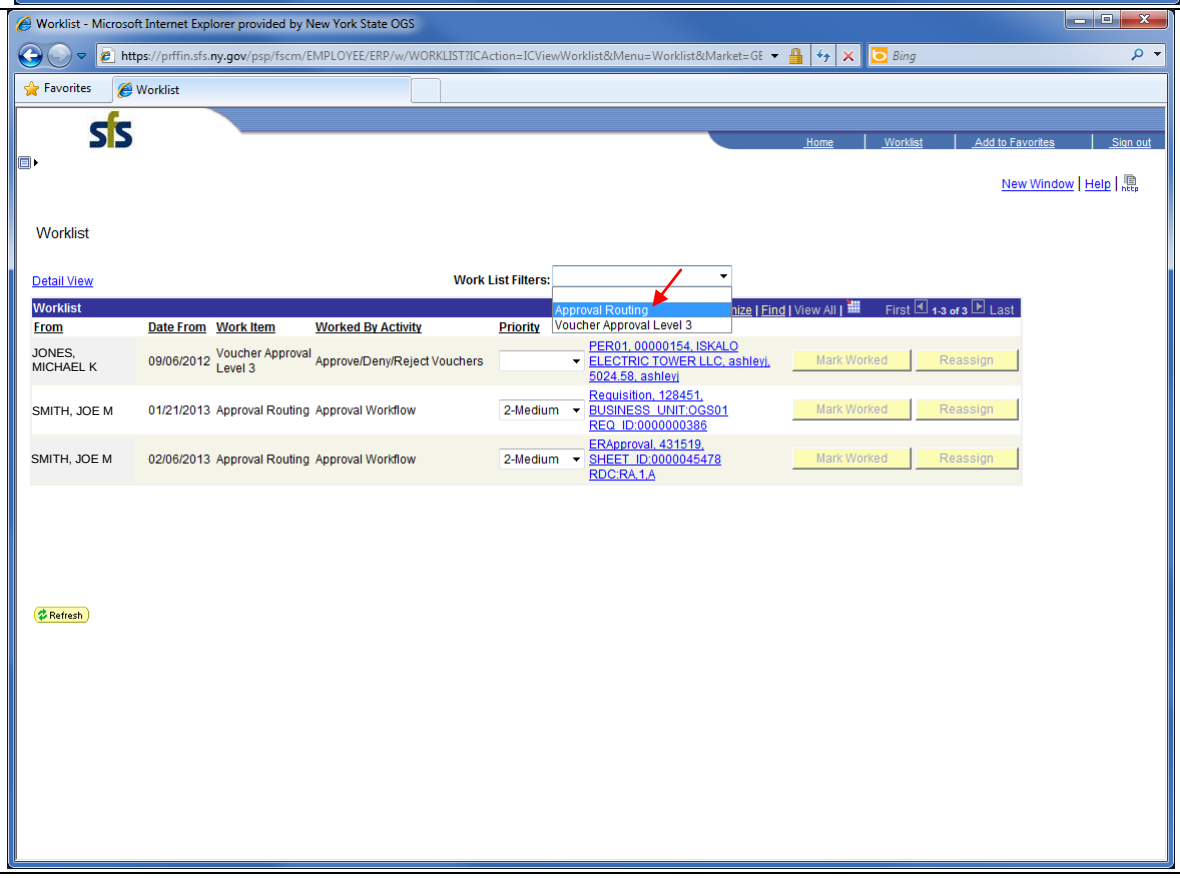
Each item on the list must be reviewed before it can be processed further.

The **Work List Filters** is used to sort the items awaiting approval.

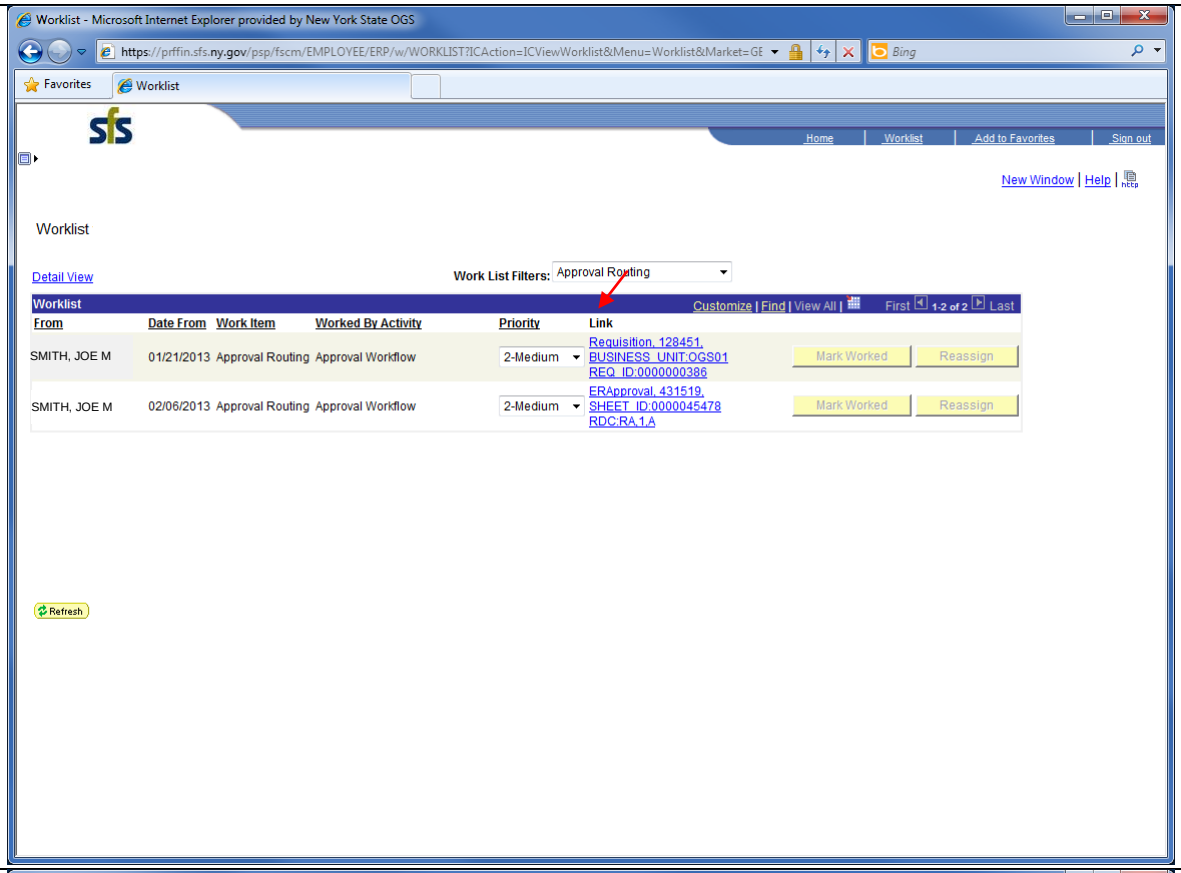
Click the Work List Filters drop down arrow.



Next, choose Approval Routing.

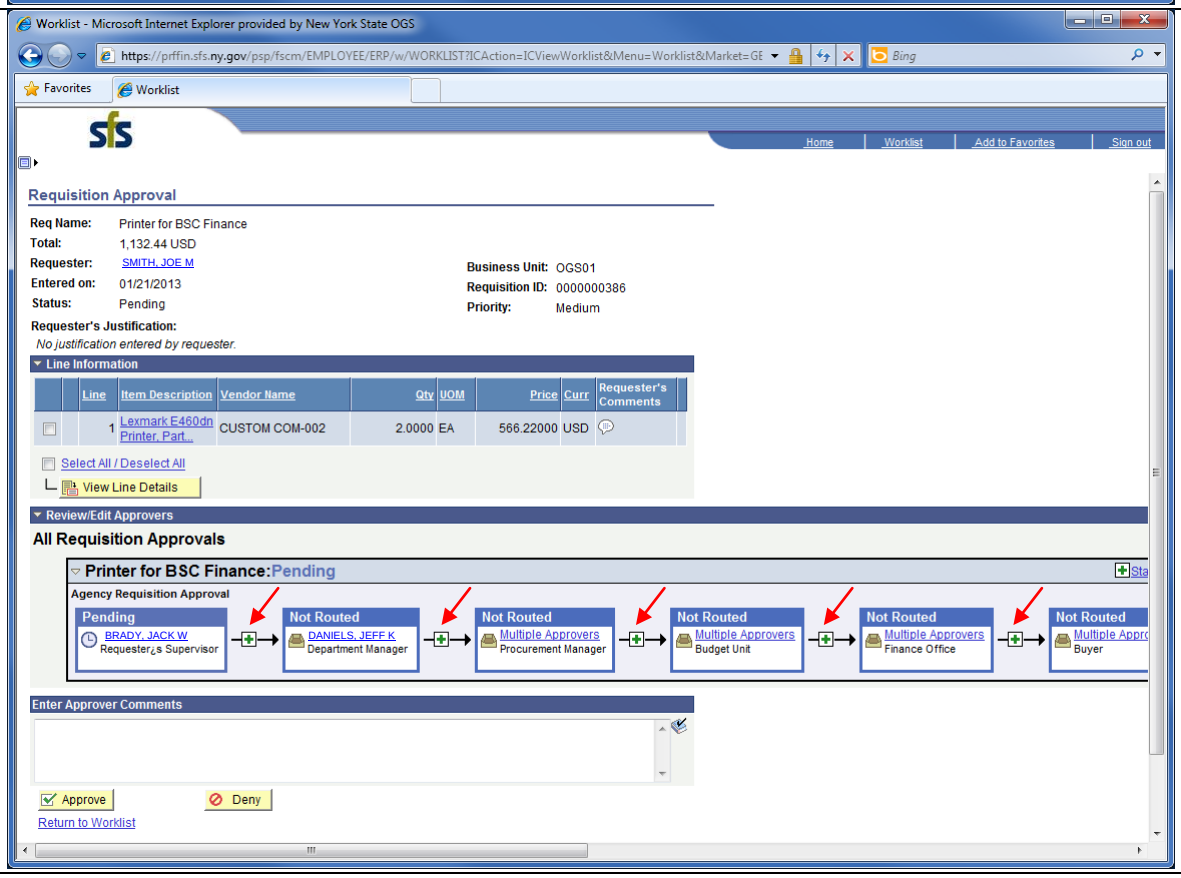


Click the Link to review the requisition.

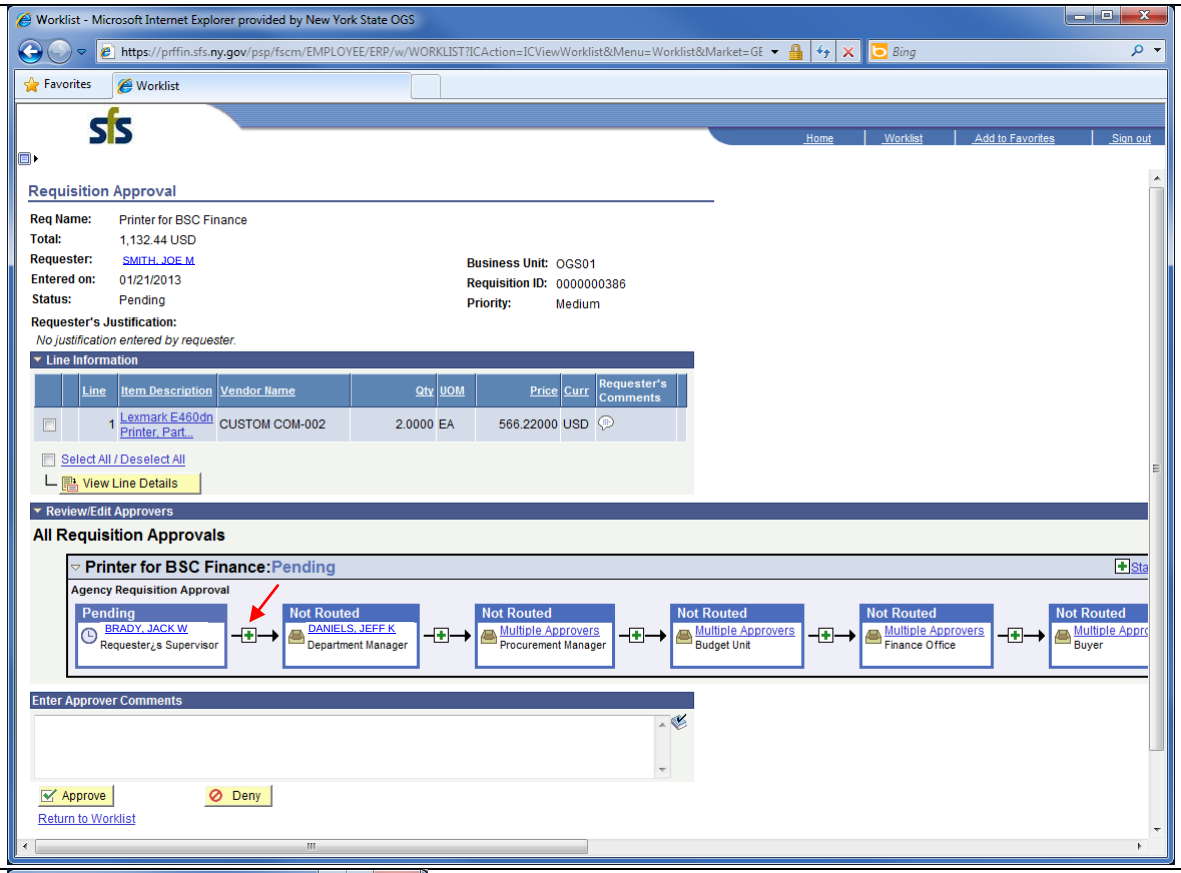


To add an additional person to the approval chain the **Insert Approver** button ⊞ is used to insert an additional approver called ad hoc approver.

The **Insert Approver** button can also be used to add a **Reviewer**. The reviewer does not add a step in the approval chain, it is an FYI.

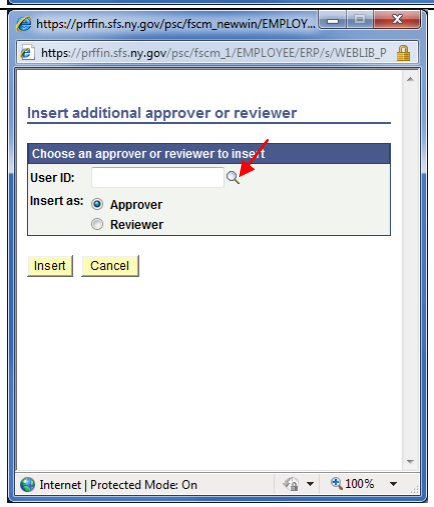


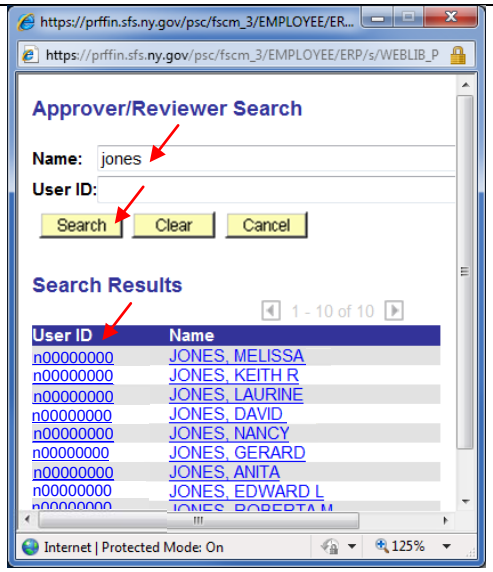
To add an ad hoc approver or reviewer, choose where in the process you want the approver/reviewer and click ➕.



Enter the reviewer/approver's User's ID. The user's id is their employee number.

If you do not know it, click 🔍.

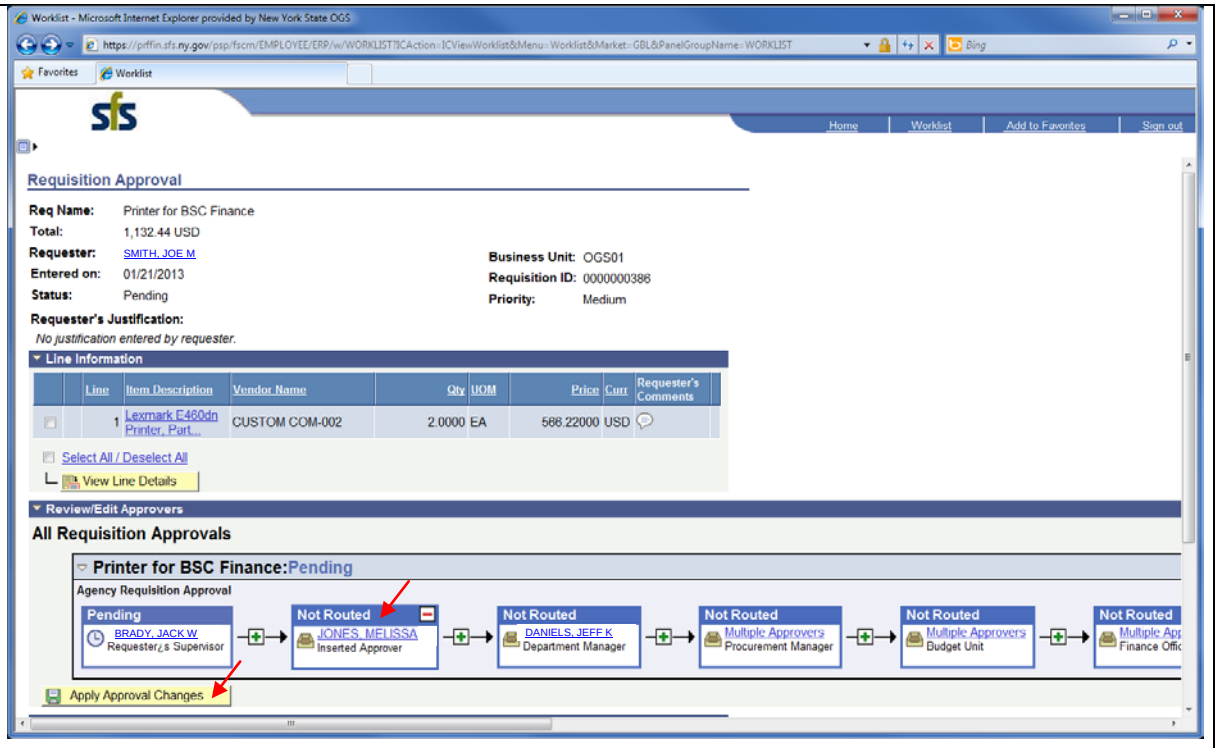


Enter the user's last name and click Search. Select the correct user.	
Choose **Approver** or **Reviewer**. An **Approver** will have to review and approve or deny the requisition in order to continue the process. The **Reviewer** can review the requisition, but cannot stop the process. Click Insert.xxx	

Check to see that the additional approver was inserted in the approval chain.

Next, click

Apply Approval Changes

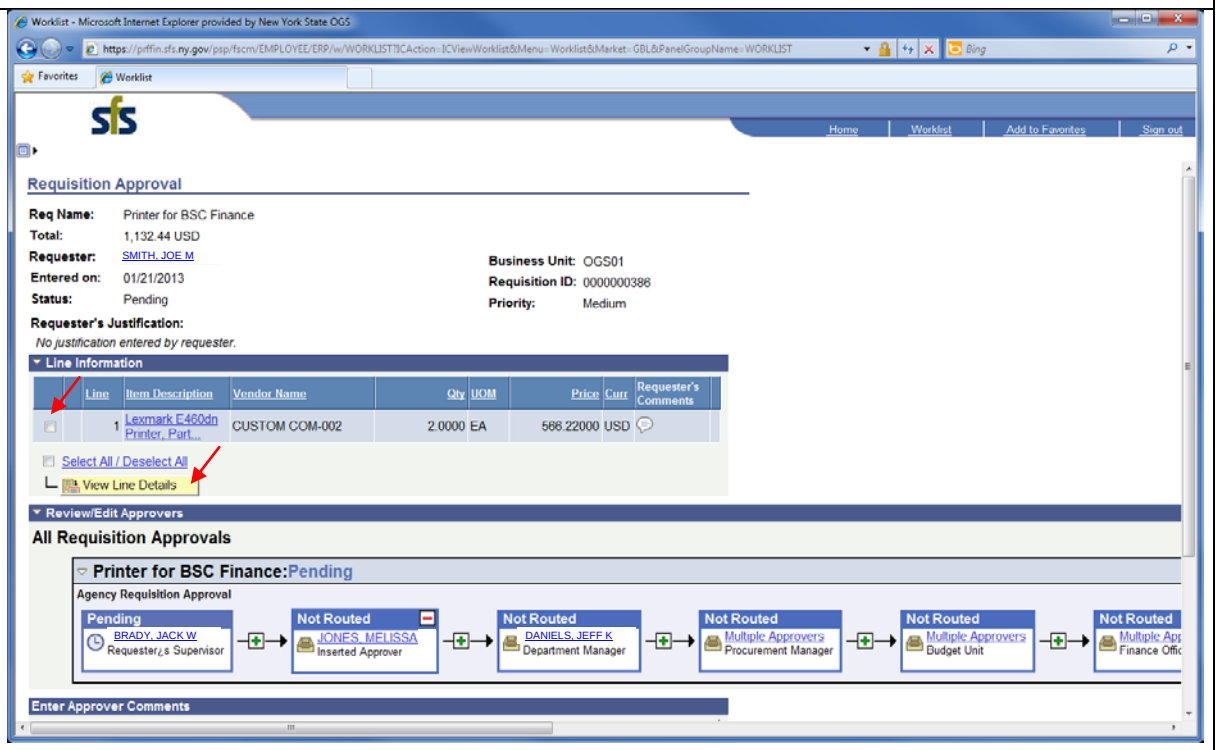


The **Line Information** should be reviewed before approving the requisition.

To view the **Line Details,** select the check box .

Click

View Line Details



All information should be carefully reviewed to make sure it is accurate.

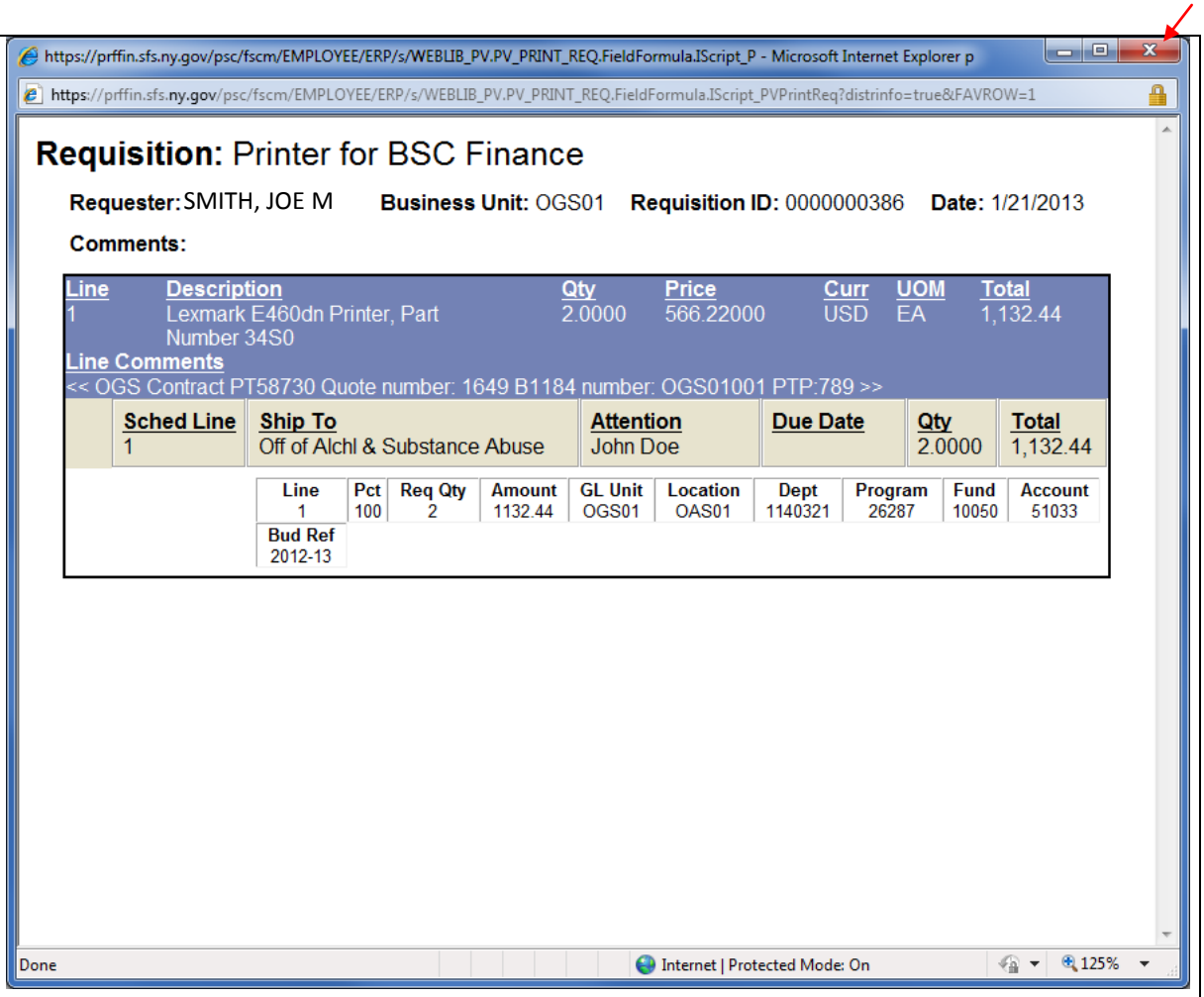
If the requisition is okay as is, move on to the **Approve** section (see page 13).

If the requisition requires more information or alteration, it must be returned to the requestor. Move on to the **Deny** section (see page 13).

If the requisition is no longer needed, move on to the **Deny** section.

Click the exit button .

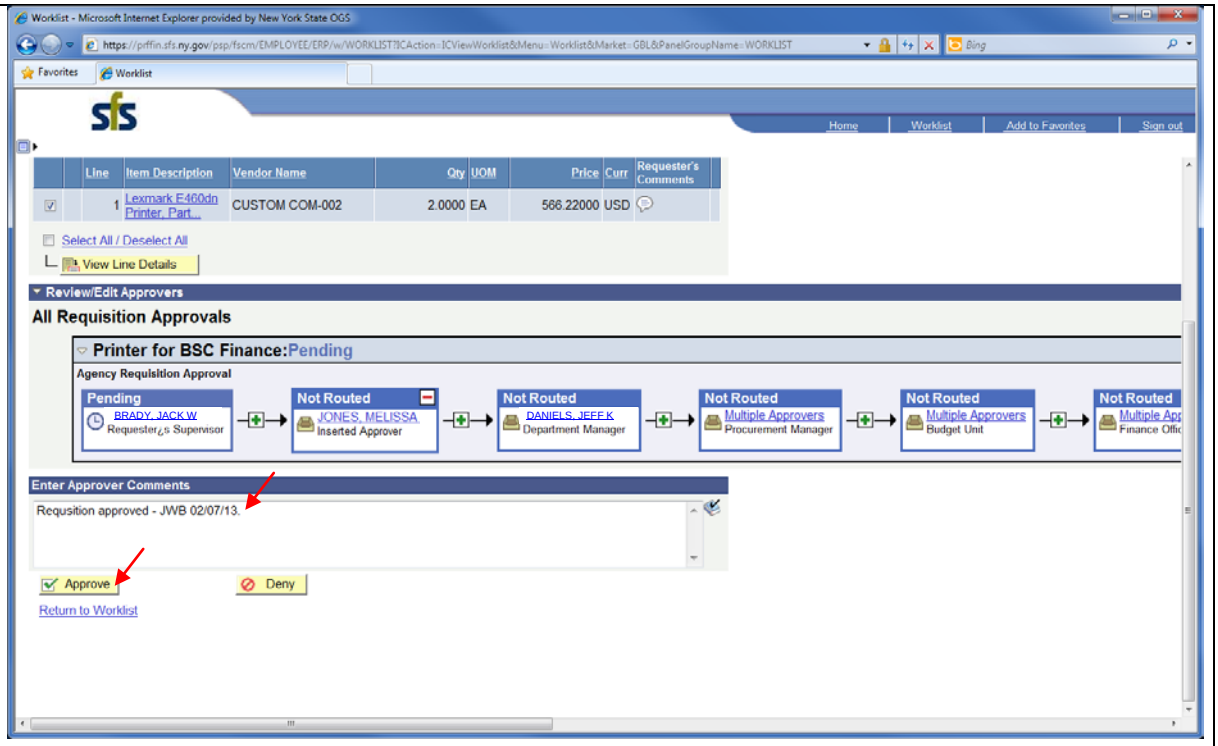
NOTE: at this stage the Budget Unit is the only approver that can alter ChartField information.



Approve

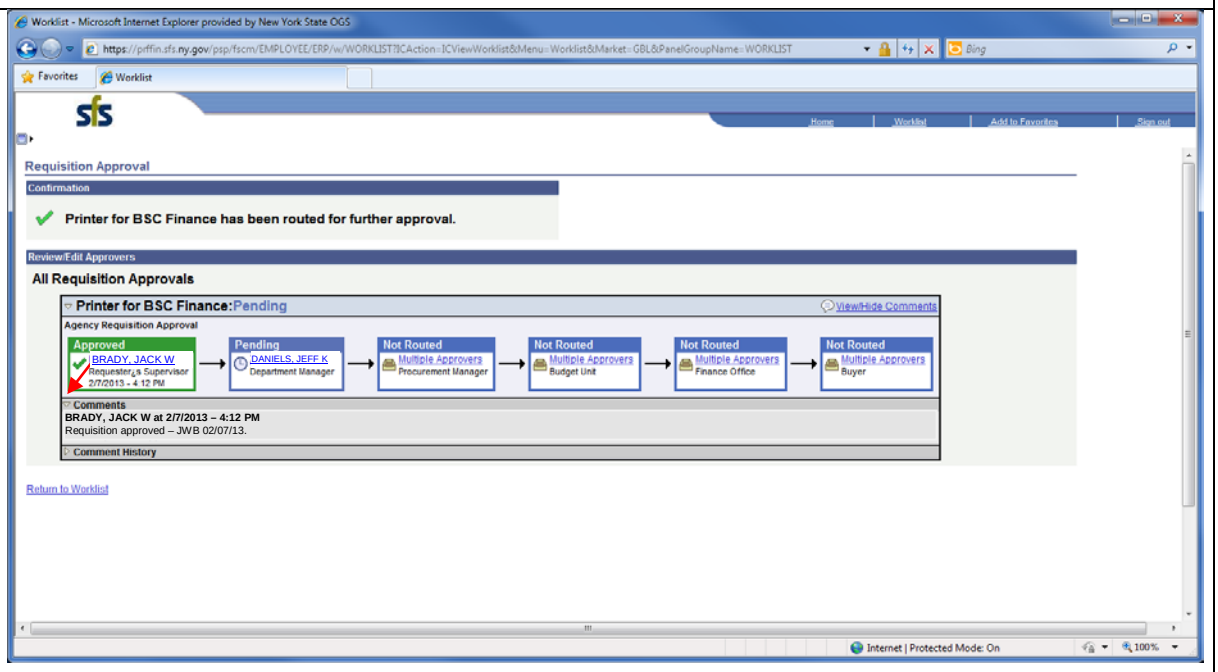
Enter Approver Comments regarding the decision, if you wish. This field is not required.

Click Approve.



To view **Comments**, click drop down menu.

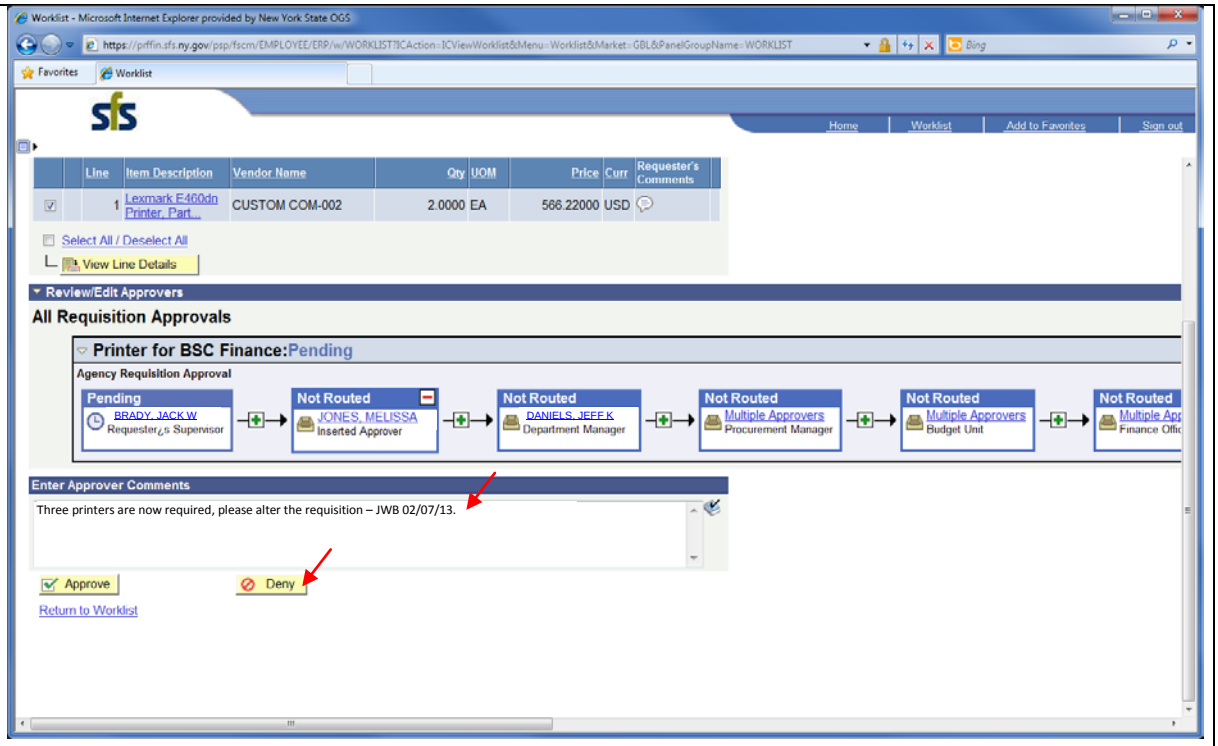
The requisition has been routed for further approval. The Budget Unit, Finance Office, and Buyer follow the same process.

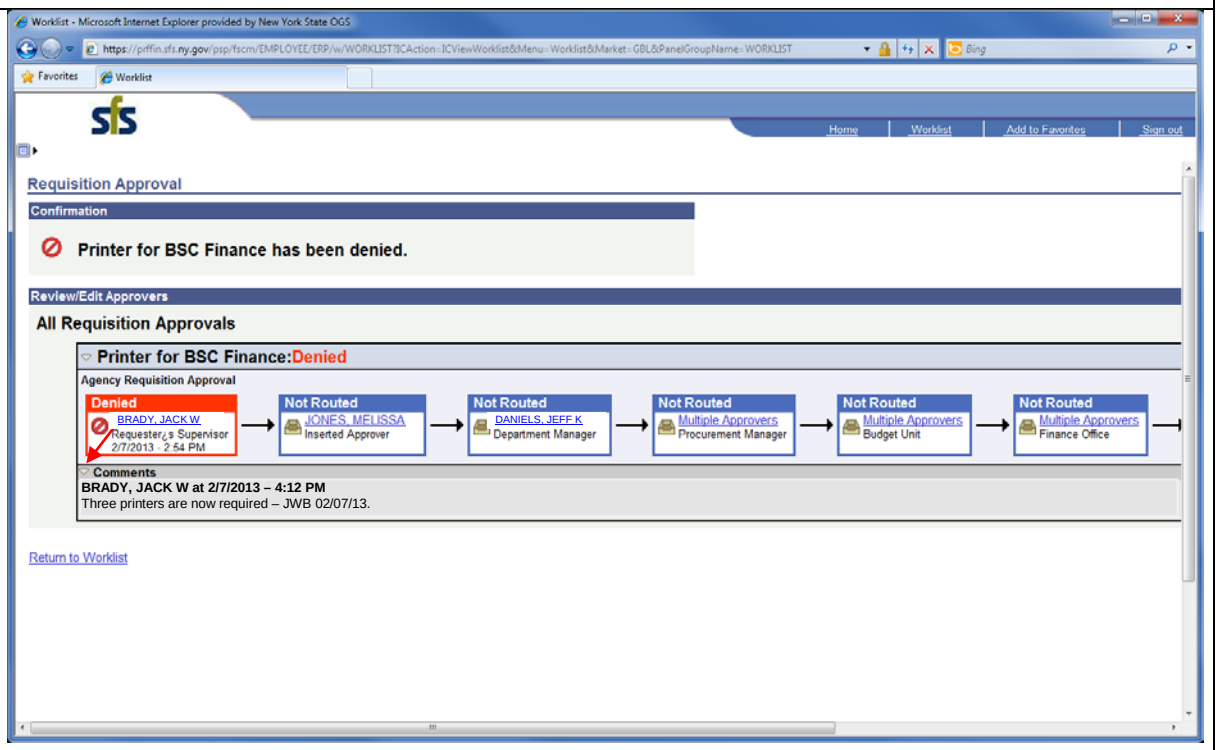


Deny

To deny, it is required that **Approver Comments** be entered regarding the decision.

Click Deny.



To view **Comments**, click drop down menu.

The requisition has been returned to the requester. The requester can access the denied requisition and edit or cancel the requisition depending on the need.