Workflow is an electronic approval routing process that allows for multiple budgetary level approvers to communicate, verify and store documents.
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The Cost Center Approver receives an auto-generated email in UT System personal Outlook inbox from the departmental Requester.

Email recipient (approver) clicks on link to access the requisition to approve

Approver will be directed to the Log-in screen in PeopleSoft. Follow the instructions on the next page.
LOGGING INTO PEOPLESOFT

Step 1

UT Share is a shared multi-institutional application. In order to authenticate you, we need to know which of the UT Share institutions you would like to login with.

Select “UT System Administration” from dropdown box, then click “Continue”

Step 2

Enter your UT System Administration SNAC and password, then click “Login”

You will be routed to the 2FA (two-factor authentication)
The 2FA* will notify you according to the authentication method you have chosen.

*UT System Administration utilizes the Duo-factor login procedure for added security. To set this up, please follow the instructions found at the link below:

https://community.utsystem.edu/sites/infosec/2fa/SitePages/GettingStarted.aspx

Once you acknowledge the notification, You will be routed to the Requisition requiring your approval.
Once the Requisition is Approved, one of the following will happen:

- Approved Requisitions under $15,000.00 will auto-create and auto-approve a Purchase Order. This signed and approved PO will route to the Requester as a pdf attached in an email. The Requester then forwards the PO pdf to the Vendor.

- Approved Requisitions over $15,000.00 will auto-create a Purchase Order which is routed to a UT System Buyer who will approve the PO and dispatch to the Vendor.

- Approved Requisitions (regardless of Dollar amount) that contain Commodity Codes for Controlled items (i.e., Computers, Software, Furniture, etc.) will route to a pre-designated Commodity Code Approver for approval. Upon that approval, the PO will auto-create and route according to set $S$ thresholds.
DENYING A REQUISITION
APPROVERS CAN DENY AUTHORIZATION OF A REQUISITION
APPROVE REQUISITIONS WITH MANAGE REQUISITION APPROVALS

Step 1

Navigate to Manage Requisition Approvals
APPROVE REQUISITIONS WITH MANAGE REQUISITION APPROVALS (CONT.)

Step 2

Set the status to Pending and click on search. All requisitions pending approval will appear.

Step 3

To approve the requisition, Approver will need to use the Action/Status drop down menu and select Approve.

Click on Submit button to process the request.
APPROVE REQUISITIONS WITH MANAGE REQUISITION APPROVALS (CONT.)

Step 4

A confirmation page will appear, approvers can add comments or notes to the creator (requisition creator).

To complete the process, click on the OK button to final approve the requisition.

Step 5

Once the submit button is selected, the status of the requisition will change from Pending to Approved.
**Requisition to Purchase Order Workflow**

- **PS Requisition Workflow**
  - **Requisition Created**
    - Requester
  - **Requisition Approved**
    - Cost Center Approver
    - Comm. Code Approved
      - Cost Center Approver
      - Comm. Code Approver
  - Less than $15,000.00
    - PO created, approved and dispatched to Vendor by Requester*
  - $15,000.00 or greater
    - PO created and routed to Buyer to approve and dispatch to Vendor

*Requester receives an email with the approved and signed Purchase Order attached as a .pdf file. The Requester forwards this .pdf to the Vendor for processing.

*Workflow is an electronic approval routing process that allows for multiple budgetary level approvers to communicate, verify and store documents.

**Note:** If the item being purchased is a controlled item such as a computer or furniture, the requisition will route to a Commodity approver for final approval.

Any controlled items should only be ordered by OTIS (Computers), or by Facilities Management (Furniture).
Additional Resources

Purchasing Contacts:

Christopher Palacios (512) 579-5143
Kyle Hayes (512) 322-3745

Visit the Contracts and Procurement website for further information:

- Staff directory
- Procedures
- Forms
- Guides
- Important Links
- Supplier Resources

https://www.utsystem.edu/offices/contracts-and-procurement