PEOPLESOFLENT IM REQUISITION APPROVAL PROCESS

End users **must** retain approval prior to creating a requisition in PeopleSoft. Failure to acquire appropriate approval will result in a non-authorized purchase order, which can hold up payment to the vendor.

1. Click on the following link to access interim approval forms: [UTShare Interim Workflow Solutions](#)

2. From the Interim Solutions page list, click on: [Review/Submit Requisition Request](#)

3. Click on Add the Document: ![Add Document](#)

4. End user should read the instructions: ![Click here for instructions.](#)

5. Give a description of the order: 
   
   ![Description of Requisition: Computers](#)

6. List the vendor the order will be placed with: 
   
   ![Vendor Name: Commonwealth Computer Co.](#)
   
   (Or who purchasing should contact for a bid for orders over $5,000)

7. Select Yes if the vendor is a Foreign Vendor, or No if the vendor is not:

8. End user can list the vendor quote number and attach an electronic quote (if applicable). It is preferred the end users attach any quote received:

9. Select one of the Commodities listed, **only if applicable**

   ![Commodity Description (if applicable)](#)

   a. For a description of these commodities, click on the description link: ![Click here for a description of each commodity listed above](#)

10. In the Item Description box, list each line item as indicated on the vendor quote:

    ![Item Description](#)

    a. The first line of the box will allow you to add shipping cost, if applicable

    ![Line | Item Description | Speed Chart | Department | Routes To: | Amount](#)

    Note: if the quote does not contain shipping, contact the vendor to ensure freight will or will not be included.

    b. To insert additional items, click on: ![Insert Item](#)

    c. Follow step “b” above until all items are listed from the attached quote.

11. In the Speedchart/Project ID box, list the speedchart or project ID (Grant or Facilities Project) to be used on the requisition or purchase order.
Once the speedchart/project ID is added, the “Routes To” approver will populate for budget approval routing.

a. To add additional expense rows, click on add row button

   i. Add Speed Chart/Project ID

   ii. Add Line Item Cost

b. Follow step “a” until all accounts are listed.

12. Click on Submit to initiate approval routing

Next Steps: Once the document is approved by the end user, SharePoint will send a confirmation email to the creator for record purpose. Several routing options will take place if the document meets the following conditions:

1. First approval required is Budget Authority, which approves the availability of funding.

2. If the order contains Grant Funding, additional approval will be required from Grants (PI) and Research Service Centers (RSC). This approval will route automatically when a Project ID is used as a SpeedChart.

3. Additional approval is necessary if one of the commodities listed on the form is selected (Laser/X-Ray Equipment, Fleet, Laboratory Animal(s), and/or Facility Services). This approval will route automatically when any of these check boxes are selected.

   Note: If Radioactive or Controlled Substances need to be ordered, DO NOT use this form. Follow the instructions at www.utsa.edu/purchasing/PS_Purch_Forms.cfm.

4. If vendor for the order is considered a “Foreign” company, additional approval is necessary from the Office of Research Integrity.