

Approve Requisitions

Overview (1)

After a requester submits a requisition, Rowdy Exchange will route it to you as an approver for review and approval.

If an approver is out of the office, Rowdy Exchange will route the requisition to alternate approvers (both automatically and manually assigned alternate approvers).

You can learn more about Rowdy Exchange and the approver role from the Rowdy Exchange training course (visit the [Purchasing Training](#) webpage).

Overview (2)

This job aid covers

- Items to consider
- The two methods for reviewing/approving requisitions

Items to Consider

As the approver, you are responsible for thoroughly reviewing the requisition to ensure accuracy, address any budget concerns and assess other relevant factors.

Based on this review, determine whether to Approve the requisition or Return it to the requester for clarification or correction.

You can Approve or Return the requisition using either one of two methods

- In Rowdy Exchange, or
- By email

Method 1: Approve in Rowdy Exchange

Next, we'll demonstrate how you can review/approve requisitions from within Rowdy Exchange.

Access Rowdy Exchange

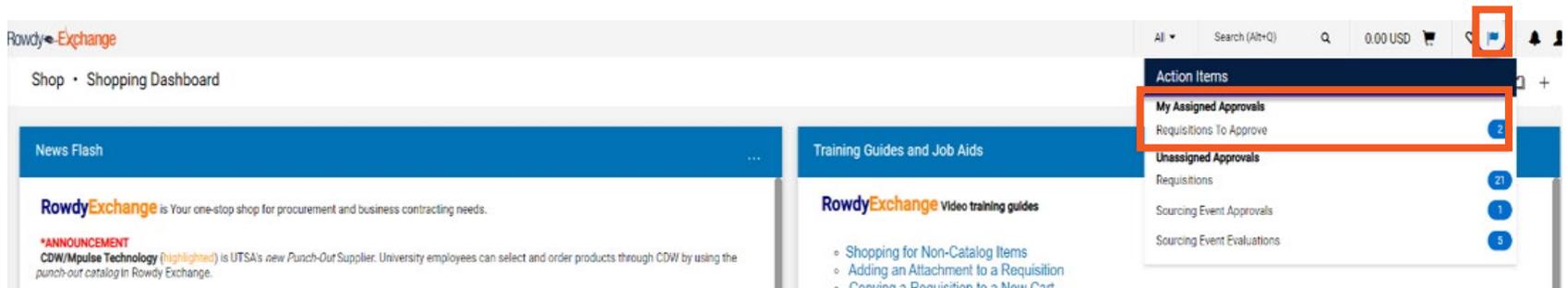
Navigate to Rowdy Exchange. To learn how, visit the [Purchasing Training](#) page > Rowdy Exchange Job Aids drop-down menu > view the **Access Rowdy Exchange** job aid video.

Approve in Rowdy Exchange (1)

1. Now that you're in Rowdy Exchange, find requisitions requiring approval:

In the top right-hand corner, hover over the Action Items flag icon. Action Items will appear.

Under My Assigned Approvals, select Requisitions to Approve.



The screenshot shows the Rowdy Exchange interface. In the top right corner, there is a flag icon for Action Items, which is highlighted with a red box. A dropdown menu is open, showing the following items:

- Action Items
- My Assigned Approvals
 - Requisitions To Approve (2)
- Unassigned Approvals
 - Requisitions (21)
 - Sourcing Event Approvals (1)
 - Sourcing Event Evaluations (5)

The 'Requisitions To Approve' item under 'My Assigned Approvals' is also highlighted with a red box.

Approve in Rowdy Exchange (2)

2. You're now on the My Approvals page. Select My PR Approvals to display the list of requisitions submitted to you.

The screenshot shows the Rowdy Exchange Approver interface. The top navigation bar includes the Rowdy Exchange logo, a search bar, and a currency indicator (0.00 USD). The breadcrumb trail is: Documents > Approvals > My Approvals > My Approvals - Requisition. The main content area shows a list of requisitions grouped by folders. The 'My PR Approvals [3 results]' folder is highlighted with a red box. The interface includes a search bar, navigation breadcrumbs, and filter options.

Group Results By: Folders

Total Results Found: 3

All Dates

Assign Go

Sort by: Submit date newest first

Hide requisition details expand all collapse all

Results per folder: 20

Filtered by

Type: Requisitions

Date Range: All Dates

View Approvals Rowdy Exchange

For: Approver

Filter My Approvals ?

Type

Requisitions

Date Range

All Dates

Approve in Rowdy Exchange (3)

3. Select a requisition. This will open a new window.

The screenshot shows the Rowdy Exchange interface. At the top, there are navigation tabs: Requisitions (45), Purchase Order, Vouchers, Contracts, Sourcing Events Evaluation (6), Sourcing Events (1), Procurement Requests, Contract Requests, AP Requests, and Sourcing Event Requests. Below the tabs, there's a 'Your Selections' section with filters for Date Range (All Dates), View Approvals For (My Approvals), and Assigned Approver (Ynes Alderson). The main content area shows a table of requisitions under the heading 'MY PR APPROVALS (11)'. The table has columns: REQUISITION NO., SUPPLIERS, ASSIGNED APPROVER, PR DATE/TIME, REQUISITIONER, and AMOUNT. The first row is highlighted in blue and contains the requisition number 18570136, supplier WILLIAMS & FUDGE INC, assigned approver Ynes Alderson, PR date/time 4/19/2024 2:57 PM, requisitioner Amy Fritz, and amount 0.01 USD. An orange arrow points to the requisition number, and a red box highlights the 'Approve' button in the bottom right corner of the row. Below the table, there are details for the selected requisition: Requisition Name (2024-04-19 6001016210 01) and No. of line items (1).

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT
18570136	WILLIAMS & FUDGE INC	Ynes Alderson	4/19/2024 2:57 PM	Amy Fritz	0.01 USD

4. Review the requisition, including any comments or attachments that may have been added:

- You can Approve the requisition if it's ready and there are no errors
- If there are errors, you can Return the requisition to the requester as a draft cart for correction then resubmission for approval

Method 2: Approve by email

Next, we'll demonstrate how you can review/approve requisitions from the approval emails you can choose to receive.

This is an alternative to approving in Rowdy Exchange.

Rowdy Exchange Profile (1)

To Approve or Return requisitions via emails auto-generated by Rowdy Exchange, you must first set up an email approval code in your Rowdy Exchange user profile.

Navigate to Rowdy Exchange. To learn how, visit the [Purchasing Training](#) page > Rowdy Exchange Job Aids drop-down menu > view the **Access Rowdy Exchange** job aid video.

Rowdy Exchange Profile (2)

1. Now that you're in Rowdy Exchange, in the top-right corner, select the User icon, then select View My Profile

The screenshot displays the Rowdy Exchange application interface. In the top-right corner, a user icon is highlighted with a red box. A dropdown menu is open, showing the user's name 'Ynes Alderson' and a 'View My Profile' option, which is also highlighted with a red box. The main content area shows a navigation bar with various categories like Requisitions (21), Purchase Order, Vouchers, Contracts, etc. Below this, there's a 'Your Selections' section with filters for Date Range and View Approvals For. The main table displays 'MY PR APPROVALS' with 2 results. The table has columns for Requisition No., Suppliers, Assigned Approver, and PR Date/Time. One entry is visible: Requisition No. 165707640, Supplier UTSA PERCUSSION, Assigned Approver Ynes Alderson, and PR Date/Time 12/5/2022 12:39 PM. Below the table, there's a 'Requisition Name' section showing '2022-12-05 6001154594 02' and a 'Folders' section showing '13 Days in folder [My PR Approvals]'. The bottom right corner of the interface has a 'Logout' button.

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME
165707640	UTSA PERCUSSION	Ynes Alderson	12/5/2022 12:39 PM

Requisition Name	Folders
2022-12-05 6001154594 02	13 Days in folder [My PR Approvals]

Rowdy Exchange Profile (3)

2. Select Change Email Approval Code

My Profile ▶ User's Name, Phone Number, Email, etc.

User Name [blurred]

User Profile and Preferences >

Update Security Settings <

Change Email Approval Code

Default User Settings >

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

User's Name, Phone Number, Email, etc. ?

First Name

Last Name

Phone Number ext.
International phone numbers must begin with +

Mobile Phone Number
International phone numbers must begin with +

E-mail Address *

Department

Position

Rowdy Exchange Profile (4)

3. In the Change Email Approval Code dialog box that appears, enter a code you can remember. Select Save Changes

The screenshot shows the Rowdy Exchange user profile settings page for Ynes Alderson. The page is titled "Language, Time Zone and Display Settings" and includes a sidebar with navigation options. A dialog box titled "Change Email Approval Code" is open in the foreground, featuring a text input field for the approval code and "Save Changes" and "Close" buttons. The background settings include dropdown menus for Language (English), Country (United States), Currency (USD), and Time Zone (CDT/CST - Central Standard Time (US/Central)). There are also radio button options for "Access Training Content Configuration" and "Accessibility" settings.

Approve by email (1)

The next time a requester submits a requisition to you for approval, you will receive an email notification.

1. About midway down the email, select Take Action to approve or return the requisition via email

Ready to approve, reject or assign this document to yourself?

Take Action



Additional Information

Internal Note

Summary Details

Approve by email (2)

2. This will open a unique URL in your web browser, where you can review the requisition in further detail
3. Scroll down on that page to review each section
4. When you're ready to take action, in the Approval Code field, enter the email approval code from your user profile

Actions

Approval Code *

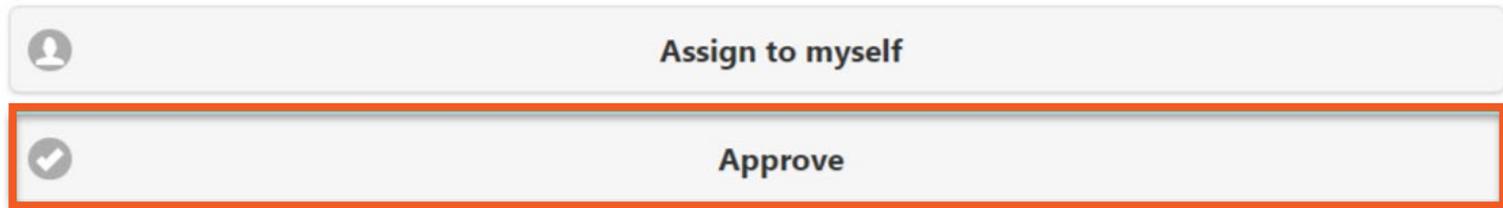
Required

Comment

Approve by email (3)

5. Then, you can

- Approve the requisition if it's ready and there are no errors, or
- Return the requisition to the requester as a draft cart for correction then resubmission for approval



After your approval

Following your approval, Rowdy Exchange will route the requisition for any additional approvals required (e.g., some requisitions require Purchasing department review).

Contact Us

If you have questions about this job aid, you can contact us at

Purchasing

[Website](#)

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Thank you

The University of Texas at San Antonio

UTSA Financial Affairs

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