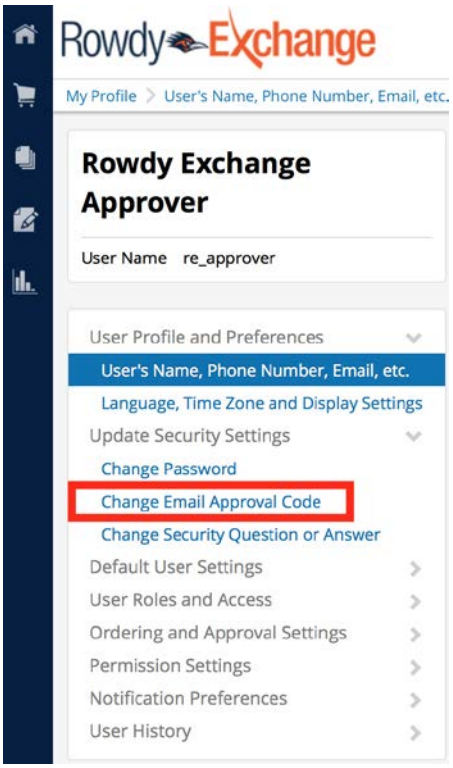
Approving Requisitions By Email and Within Rowdy Exchange

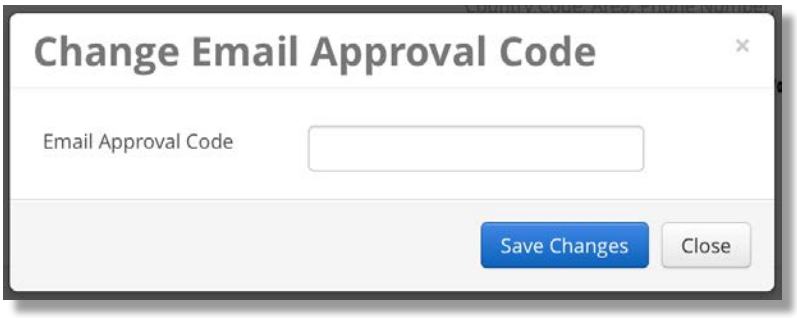
There are multiple methods for approving requisitions. Reference the following instructions for approving by email and in Rowdy Exchange.

Approving By Email

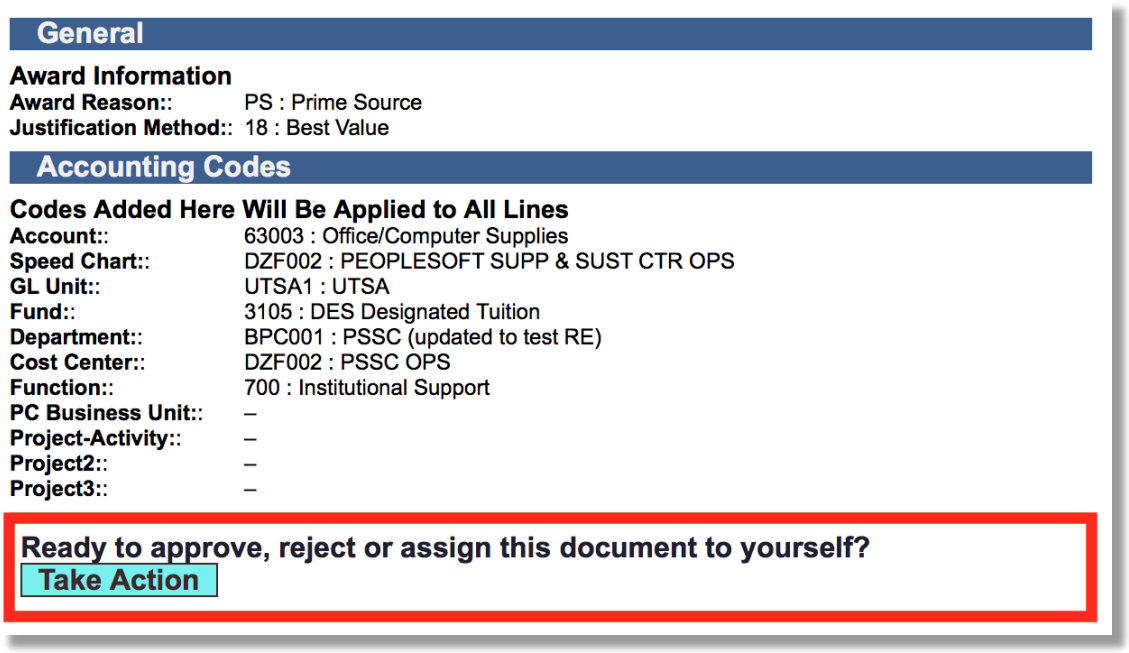
1. **Create or update your Email approval code**: Navigate to "Change Email Approval Code"; View My Profile → Update Security Settings



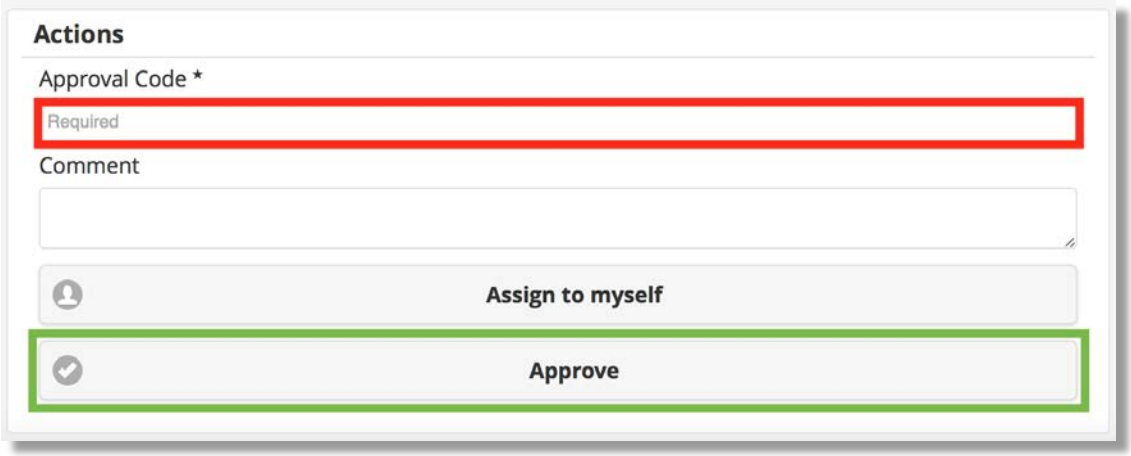
Code is required to approve requisitions without the need to log into Rowdy Exchange. The approval code needs to be a minimum of four (4) characters. Enter code and click "Save Changes."



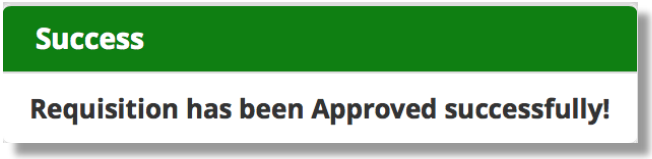
2. **Approving by Email**: When a purchase requisition is submitted for approval, an email notification will be generated by Rowdy Exchange. With the approval email notification open, review the requisition details and locate the "Take Action" button. This button will only appear if an approval code has been established as outlined in Step 1.



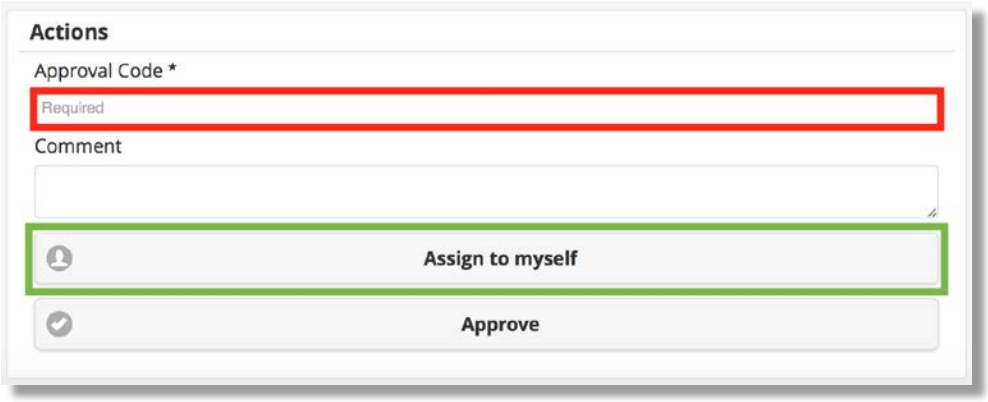
Upon clicking the "Take Action" button, a new webpage will appear within your default browser. The "Actions" section will be located at the bottom of the page.



To approve the requisition, enter the approval code and select the “Approval” button. A success message will appear indicating the requisition was approved.



To reject or return the requisition, assignment of the requisition must first occur. To do so, enter the approval code and click “Assign to myself.”

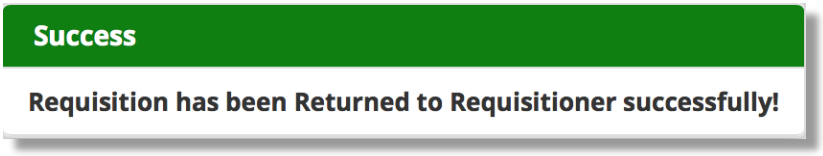


A success message will be displayed confirming the assignment of the requisition. This assignment will prevent other approvers assigned to the approval step from taking action.

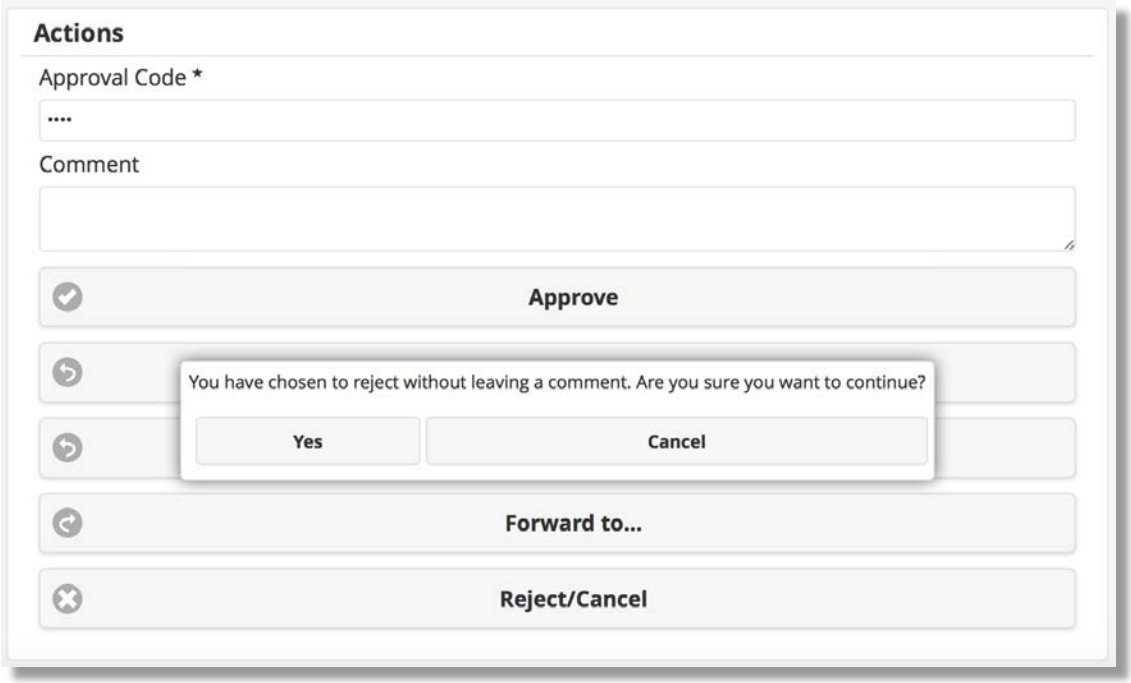
With the requisition assigned, the following five actions can be taken.

a. **Approve:** This will grant approval and push the requisition to the (1) next approval step and/or (2) creation of the purchase order.
b. **Return to Share Folder:** This will make the requisition available (if applicable) for other step approvers to take action.
c. **Return to Requisitioner:** The requisition may need to be returned so the requester can take action to change the cost center, justification, etc. After the requester makes the requested change, the requisition can be resubmitted for purchase approval.
d. **Forward to…:** By using the "Forward" function, the requisition approval authority is being assigned to another UTSA approver.
e. **Reject/Cancel:** This will deny the purchase request and prevent further action against the requisition.

Example: Requisition was returned to change the cost center.



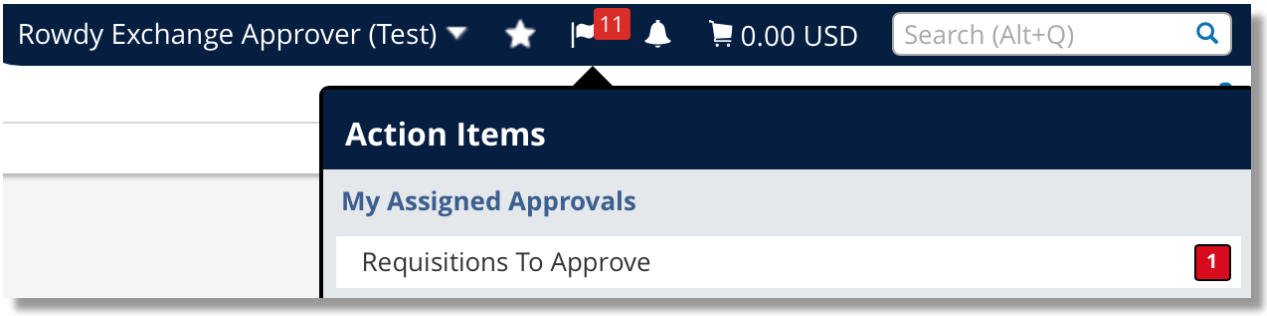
As a best practice, it is recommended that a comment is entered for any action other than "Approve."



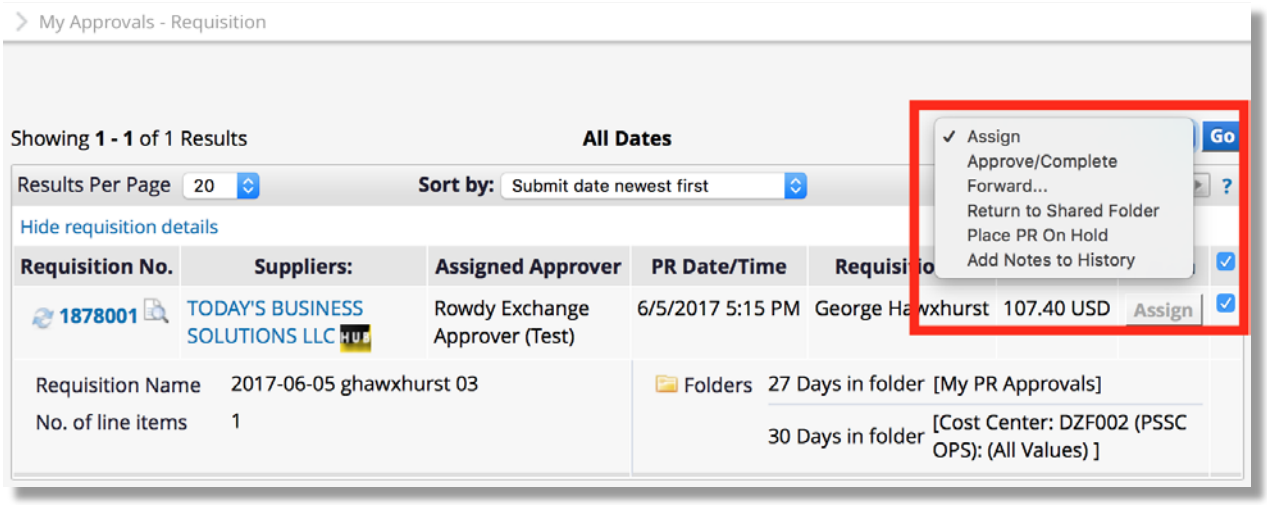
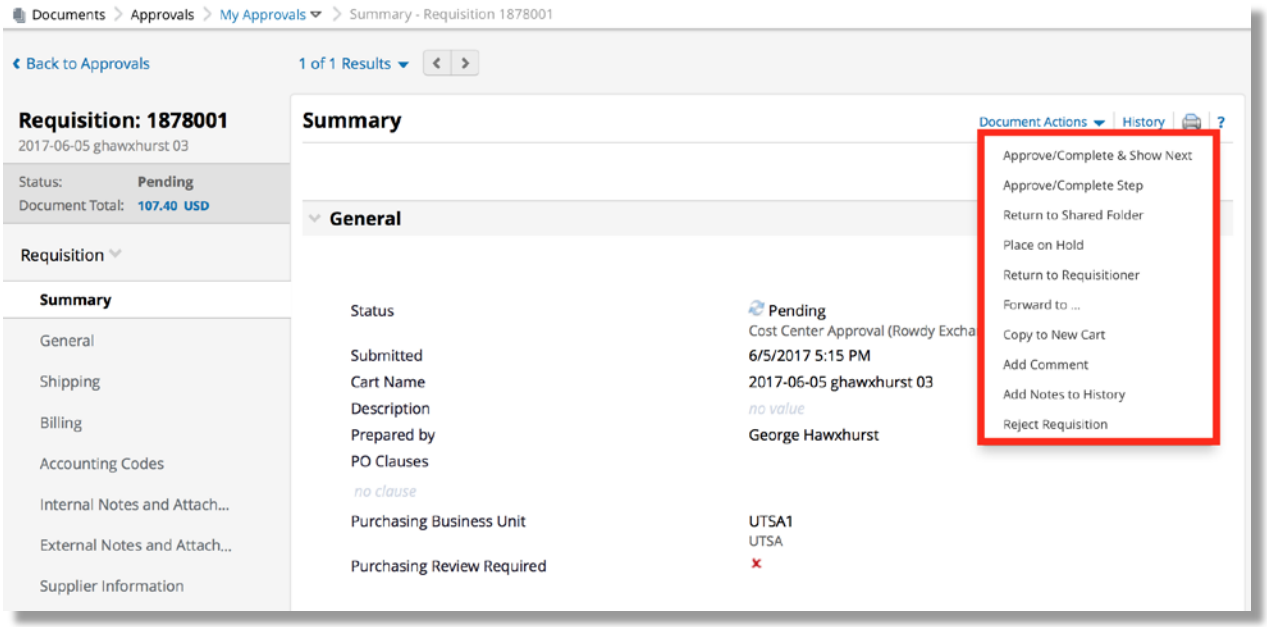
Approving Within Rowdy Exchange:

While approving via email is simple and does not require logging into Rowdy Exchange, approvals also can be accomplished within the application.

Upon logging into the application, a list of requisitions to approve will be displayed. If your user profile is assigned other security roles or you have a different default landing page (i.e., TCM), the list can be accessed by clicking on the action item flag and then selected "Requisitions To Approve."



Online approvals have the same available actions with the exception of two: "Place PR on Hold" and "Add Notes to History." From this view, place a check next to the requisition and select the desired action from the drop-down list. To reject or cancel, the requisition must first be assigned.



Alternatively, the complete list of “Document Actions” can be accessed by opening the requisition.