

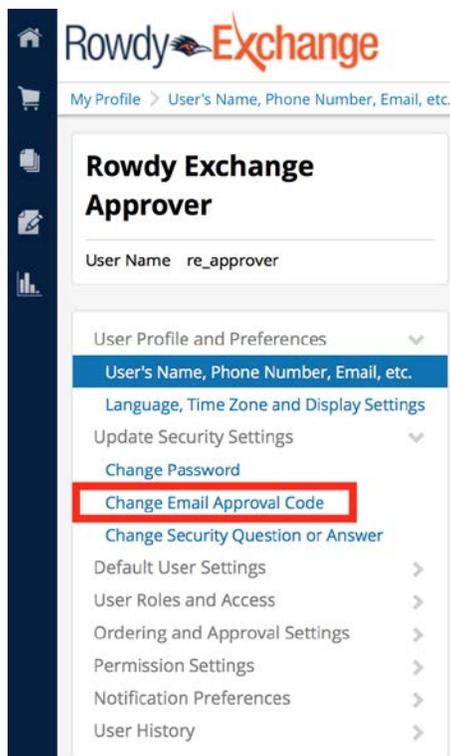
Rowdy Exchange

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.”

A dialog box titled "Change Email Approval Code" with a close button (X) in the top right corner. It contains a text input field labeled "Email Approval Code". At the bottom, there are two buttons: "Save Changes" (highlighted in blue) and "Close".

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.

A summary of purchase requisition details. It features two blue header bars: "General" and "Accounting Codes".

General

Award Information
Award Reason:: PS : Prime Source
Justification Method:: 18 : Best Value

Accounting Codes

Codes Added Here Will Be Applied to All Lines

Account:: 63003 : Office/Computer Supplies
Speed Chart:: DZF002 : PEOPLESFT SUPP & SUST CTR OPS
GL Unit:: UTSA1 : UTSA
Fund:: 3105 : DES Designated Tuition
Department:: BPC001 : PSSC (updated to test RE)
Cost Center:: DZF002 : PSSC OPS
Function:: 700 : Institutional Support
PC Business Unit:: -
Project-Activity:: -
Project2:: -
Project3:: -

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

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.

Actions

Approval Code *

Required

Comment

 Assign to myself

 Approve

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

Success

Requisition has been Approved successfully!

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.”

Actions

Approval Code *

Required

Comment

 Assign to myself

 Approve

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.

The screenshot shows a web interface titled "Other Approvers" with a green success banner at the top that reads "Success" and "Requisition has been Assigned successfully!". Below the banner, there is a section labeled "Actions" containing a form with two fields: "Approval Code *" (with a "Required" label) and "Comment". Below the form are five buttons, each with a small icon on the left and a label: "Approve" (checkmark icon), "Return to Shared Folder" (right arrow icon), "Return to Requisitioner" (left arrow icon), "Forward to..." (left arrow icon), and "Reject/Cancel" (X icon).

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.

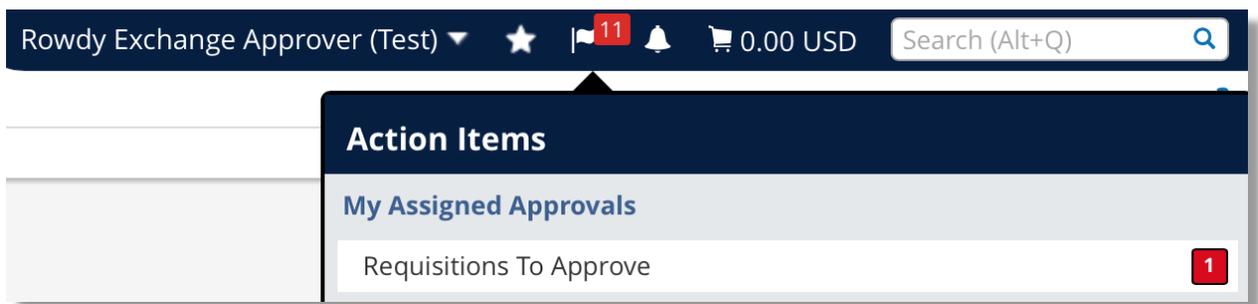
The screenshot shows a green banner with the word "Success" in white. Below the banner is a white box with a grey border containing the text "Requisition has been Returned to Requisitioner successfully!" in bold black font.

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.

> My Approvals - Requisition

Showing 1 - 1 of 1 Results All Dates

Results Per Page: 20 Sort by: Submit date newest first

[Hide requisition details](#)

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisition	Amount	Actions
1878001	TODAY'S BUSINESS SOLUTIONS LLC	Rowdy Exchange Approver (Test)	6/5/2017 5:15 PM	George Hawxhurst	107.40 USD	Assign

Requisition Name: 2017-06-05 ghawxhurst 03
 No. of line items: 1

Folders: 27 Days in folder [My PR Approvals]
 30 Days in folder [Cost Center: DZF002 (PSSC OPS); (All Values)]

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

Documents > Approvals > My Approvals > Summary - Requisition 1878001

[Back to Approvals](#) 1 of 1 Results

Requisition: 1878001
2017-06-05 ghawxhurst 03

Status: **Pending**
Document Total: **107.40 USD**

Requisition

Summary

- General
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attach...
- External Notes and Attach...
- Supplier Information

Summary

Document Actions | History

- Approve/Complete & Show Next
- Approve/Complete Step
- Return to Shared Folder
- Place on Hold
- Return to Requisitioner
- Forward to ...
- Copy to New Cart
- Add Comment
- Add Notes to History
- Reject Requisition

General

Status: Pending
Cost Center Approval (Rowdy Exchange)

Submitted: 6/5/2017 5:15 PM

Cart Name: 2017-06-05 ghawxhurst 03

Description: no value

Prepared by: George Hawxhurst

PO Clauses: no clause

Purchasing Business Unit: UTSA1
UTSA

Purchasing Review Required: x