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Approve a Requisition in SFS Deny a Requisition in SFS

Submitted requisitions are forwarded to the supervisor for approval. The supervisor is responsible for reviewing the requisition for accuracy and appropriateness.

In this module you will learn how to approve or deny a requisition.

Click **SFS Applications**.

Employee-facing registry content - Microsoft Internet Explorer provided by New York State OGS

https://nysis.sfs.ny.gov/psp/SFS/EMPLOYEE/EMPL/hr?tab=DEFAULT

Employee-facing registry content

Welcome

Search: Home | Sign out

sfs STATEWIDE FINANCIAL SYSTEM

Enterprise Menu

- SFS Applications
- My Content
- Reporting Tools
 - My Instant Messaging
 - Change My Password
 - My Personalizations
 - My System Profile

SFS Communications

Welcome to the Statewide Financial System (SFS) Agency User Portal!

First time logging in? See the **"BEFORE using the SFS"** section below for important steps and information regarding your password.

See the [2/7 Issue of Enterprise Connection](#) for information on: 2/13 FDR Preparation Workshop for FYE; Updated OSC Calendar Added to Resources on FYE Dashboard Web Page; OSC AP Advisory 21: Master Contracts; New Business Unit GAM01 Replaces LTY01 and RWB01; new items posted to SFS website.

12/18/12, SFS SYSTEM ALERT: The SFS Program will be making changes to the way file attachments are scanned before they are saved to SFS Financials Production (PCAS) beginning today. These changes may result in users receiving messages they have not seen before. [Please read the System Alert e-mail for full information.](#)

11/27/12, SFS SYSTEM ALERT: Agency users may experience problems in the SFS Production Reporting (OBIEE) application caused by an incompatibility issue between Adobe Acrobat and a user's web browser (i.e. Internet Explorer 7, 8, or 9). If you have

My Reports

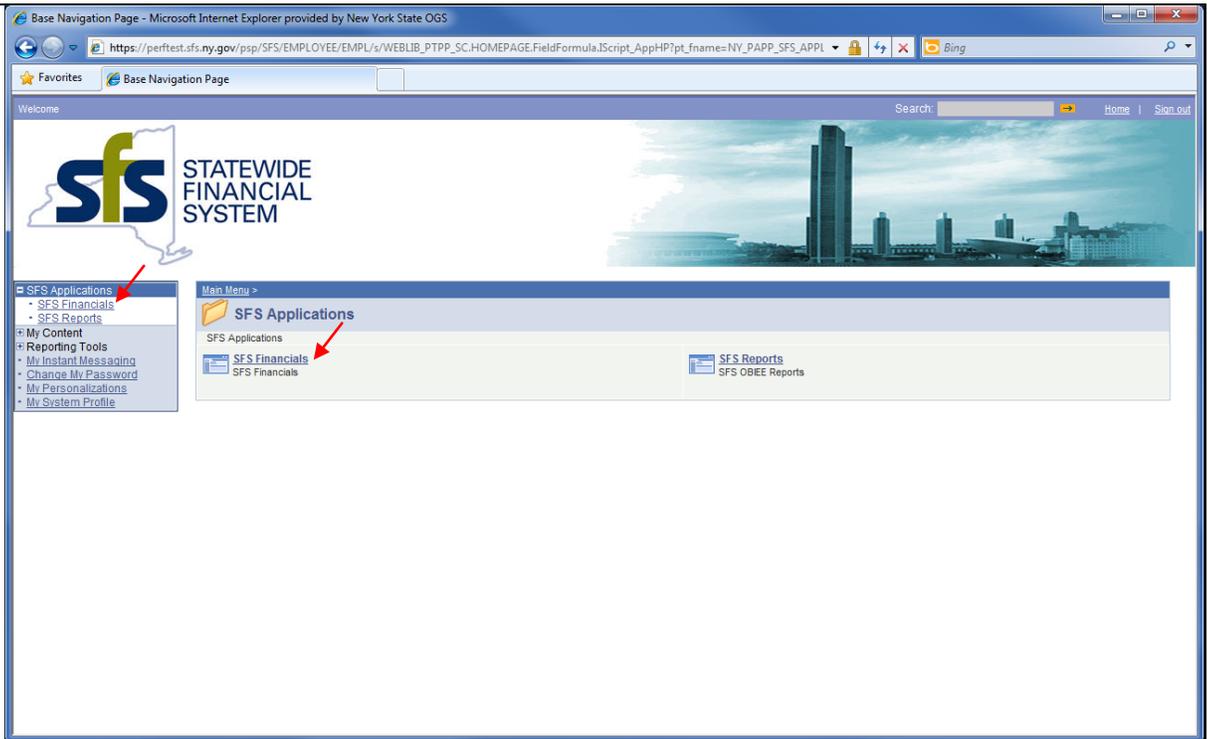
Report	Folder
NYGL0363	NY_BOR
NYGR0039	General
NYGL0363	NY_BOR
NY_CSHBAL_AE	General
NY_CSHBAL_AE	General

2013-02-08-00:21:3
2013-02-08-22:30:5

[Report Manager](#)

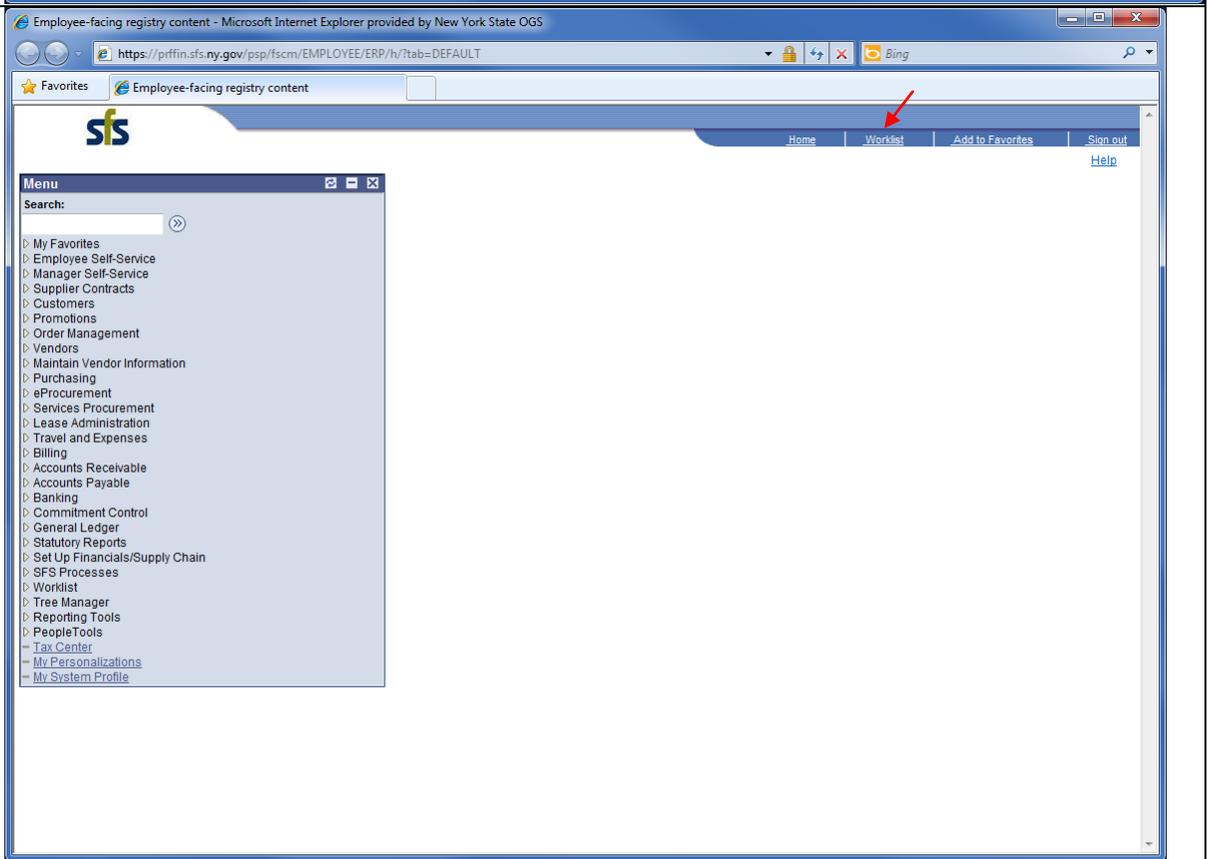
Internet | Protected Mode: On | 100%

Next, click **SFS Financials** (either location).



The Worklist page is used to view and take action on pending approvals routed through workflow.

Click **Worklist**.



Collapse the menu pagelet – Click the minimize button.

The screenshot shows a web browser window titled "Worklist - Microsoft Internet Explorer provided by New York State OGS". The address bar shows the URL: <https://prffin.sfs.ny.gov/psp/fscm/EMPLOYEE/ERP/w/WORKLIST?ICAction=ICViewWorklist&Menu=Worklist&Market=GE>. The browser's Favorites bar shows "Worklist".

The page features a navigation menu on the left side with the SFS logo at the top. The menu items include: My Favorites, Employee Self-Service, Manager Self-Service, Supplier Contracts, Customers, Promotions, Order Management, Vendors, Maintain Vendor Information, Purchasing, eProcurement, Services Procurement, Lease Administration, Travel and Expenses, Billing, Accounts Receivable, Accounts Payable, Banking, Commitment Control, General Ledger, Statutory Reports, Set Up Financials/Supply Chain, SFS Processes, Worklist (expanded), Worklist Details, Tree Manager, Reporting Tools, PeopleTools, Tax Center, My Personalizations, and My System Profile. A red arrow points to the minimize button in the menu's header.

The main content area is titled "Worklist" and includes a "Detail View" link and "Work List Filters:" dropdown. Below this is a table with the following data:

From	Date From	Work Item	Worked By Activity	Priority	Link		
JONES, MICHAEL K	09/06/2012	Voucher Approval Level 3	Approve/Deny/Reject Vouchers		PER01_00000154_ISKALO ELECTRIC TOWER LLC_ashlewi_5024.58_ashlewi	Mark Worked	Reas
SMITH, JOE M	01/21/2013	Approval Routing	Approval Workflow	2-Medium	Requisition_128451 BUSINESS_UNIT:OGS01 REQ_ID:0000000388	Mark Worked	Reas
SMITH, JOE M	02/06/2013	Approval Routing	Approval Workflow	2-Medium	ERApproval_431519 SHEET_ID:0000045478 RDC:RA1A	Mark Worked	Reas

At the bottom of the table area, there is a "Refresh" button.

The [Detail View](#) shows the worklist in table format.

The **From** field shows the person who began the work item.

The **Date From** field shows the date the item was started.

The **Work Item** shows the status of the item.

The **Worked By Activity** shows the next step in the process.

The **Priority** field shows the default.

The **Refresh** button can be used to update the page with the most recent changes.

The **Mark Worked** button is used to remove an item from the worklist. If it is greyed out, the work is still in process.

The **Link** opens the Requisition Approval page.

Worklist - Microsoft Internet Explorer provided by New York State OGS

https://prffin.sfs.ny.gov/psp/fscm/EMPLOYEE/ERP/w/WORKLIST?iCAction=ICViewWorklist&Menu=Worklist&Ma...

Worklist

Work List Filters: [Dropdown]

From	Date From	Work Item	Worked By Activity	Priority	Link		
JONES, MICHAEL K	09/06/2012	Voucher Approval Level 3	Approve/Deny/Reject Vouchers	[Dropdown]	PER01_00000154_ISKALO ELECTRIC TOWER LLC_ashlevi_5024.58_ashlevi	Mark Worked	Reassign
SMITH, JOE M	02/06/2013	Approval Routing	Approval Workflow	2-Medium	ERApproval_431519_SHEET_ID:000045478 RDC:RA.1A	Mark Worked	Reassign
SMITH, JOE M	03/08/2013	Approval Routing	Approval Workflow	2-Medium	Requisition_128851_BUSINESS_UNIT:OGS01 REQ_ID:000000387	Mark Worked	Reassign
WHITE, SCOTT R	03/08/2013	Approval Routing	Approval Workflow	2-Medium	Requisition_128852_BUSINESS_UNIT:OGS01 REQ_ID:000000388	Mark Worked	Reassign

Refresh

Each item on the list must be reviewed before it can be processed further.

The **Work List Filters** is used to sort the items awaiting approval.

Click the **Work List Filters** drop down arrow.

Worklist

Work List Filters: 

From	Date From	Work Item	Worked By Activity	Priority		Mark Worked	Reassign
JONES, MICHAEL K	09/06/2012	Voucher Approval Level 3	Approve/Deny/Reject Vouchers		PER01_00000154_ISKALO ELECTRIC TOWER LLC_ashlevi_5024.58_ashlevi		
SMITH, JOE M	01/21/2013	Approval Routing	Approval Workflow	2-Medium	Requisition_128451 BUSINESS_UNIT_OGS01 REQ_ID:0000000386		
SMITH, JOE M	02/06/2013	Approval Routing	Approval Workflow	2-Medium	ERApproval_431519 SHEET_ID:0000045478 RDC:RA:1A		

[Refresh](#)

Next, choose **Approval Routing**.

Worklist

Work List Filters: 

From	Date From	Work Item	Worked By Activity	Priority		Mark Worked	Reassign
JONES, MICHAEL K	09/06/2012	Voucher Approval Level 3	Approve/Deny/Reject Vouchers		PER01_00000154_ISKALO ELECTRIC TOWER LLC_ashlevi_5024.58_ashlevi		
SMITH, JOE M	01/21/2013	Approval Routing	Approval Workflow	2-Medium	Requisition_128451 BUSINESS_UNIT_OGS01 REQ_ID:0000000386		
SMITH, JOE M	02/06/2013	Approval Routing	Approval Workflow	2-Medium	ERApproval_431519 SHEET_ID:0000045478 RDC:RA:1A		

[Refresh](#)

Click the **Link** to review the requisition.

To add an additional person to the approval chain the **Insert Approver** button  is used to insert an additional approver called ad hoc approver.

The **Insert Approver** button can also be used to add a **Reviewer**. The reviewer does not add a step in the approval chain, it is an FYI.

To add an ad hoc approver or reviewer, choose where in the process you want the approver/reviewer and click



The screenshot shows a web browser window titled "Worklist - Microsoft Internet Explorer provided by New York State OGS". The URL is <https://prffin.sfs.ny.gov/psc/fscm/EMPLOYEE/ERP/w/WORKLIST?ICAction=ICViewWorklist&Menu=Worklist&Market=GE>. The page displays a "Requisition Approval" form for a printer. Key details include: Req Name: Printer for BSC Finance, Total: 1,132.44 USD, Requester: SMITH, JOE M, Business Unit: OGS01, Requisition ID: 0000000386, Entered on: 01/21/2013, Status: Pending, and Priority: Medium. A table under "Line Information" shows one line item: Lexmark E460dn Printer, Part_ (CUSTOM COM-002) with a quantity of 2,000 EA and a price of 566.22000 USD. Below the table is a "Review/Edit Approvers" section titled "All Requisition Approvals" for "Printer for BSC Finance: Pending". The process flow is: Agency Requisition Approval (Pending) by BRADY, JACK W (Requester's Supervisor) -> DANIELS, JEFF K (Department Manager) -> Multiple Approvers (Procurement Manager) -> Multiple Approvers (Budget Unit) -> Multiple Approvers (Finance Office) -> Multiple Approvers (Buyer). A red arrow points to the plus icon between the first two steps. Below the flow is an "Enter Approver Comments" field and "Approve" and "Deny" buttons.

Enter the reviewer/approver's User's ID. The user's id is their employee number.

If you do not know it, click

The screenshot shows a dialog box titled "Insert additional approver or reviewer". It contains a search field for "User ID:" with a magnifying glass icon to its right. Below the search field are two radio buttons: "Approver" (selected) and "Reviewer". At the bottom of the dialog are "Insert" and "Cancel" buttons. A red arrow points to the magnifying glass icon.

Enter the user's last name and click **Search**.

Select the correct user.

Approver/Reviewer Search

Name: jones

User ID:

Search Clear Cancel

Search Results

1 - 10 of 10

User ID	Name
n00000000	JONES, MELISSA
n00000000	JONES, KEITH R
n00000000	JONES, LAURINE
n00000000	JONES, DAVID
n00000000	JONES, NANCY
n00000000	JONES, GERARD
n00000000	JONES, ANITA
n00000000	JONES, EDWARD L
n00000000	JONES, ROBERTA M

Choose **Approver** or **Reviewer**.

An **Approver** will have to review and approve or deny the requisition in order to continue the process.

The **Reviewer** can review the requisition, but cannot stop the process.

Click **Insert** .xxx

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID: n00000000 JONES, MELISSA

Insert as:

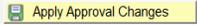
Approver

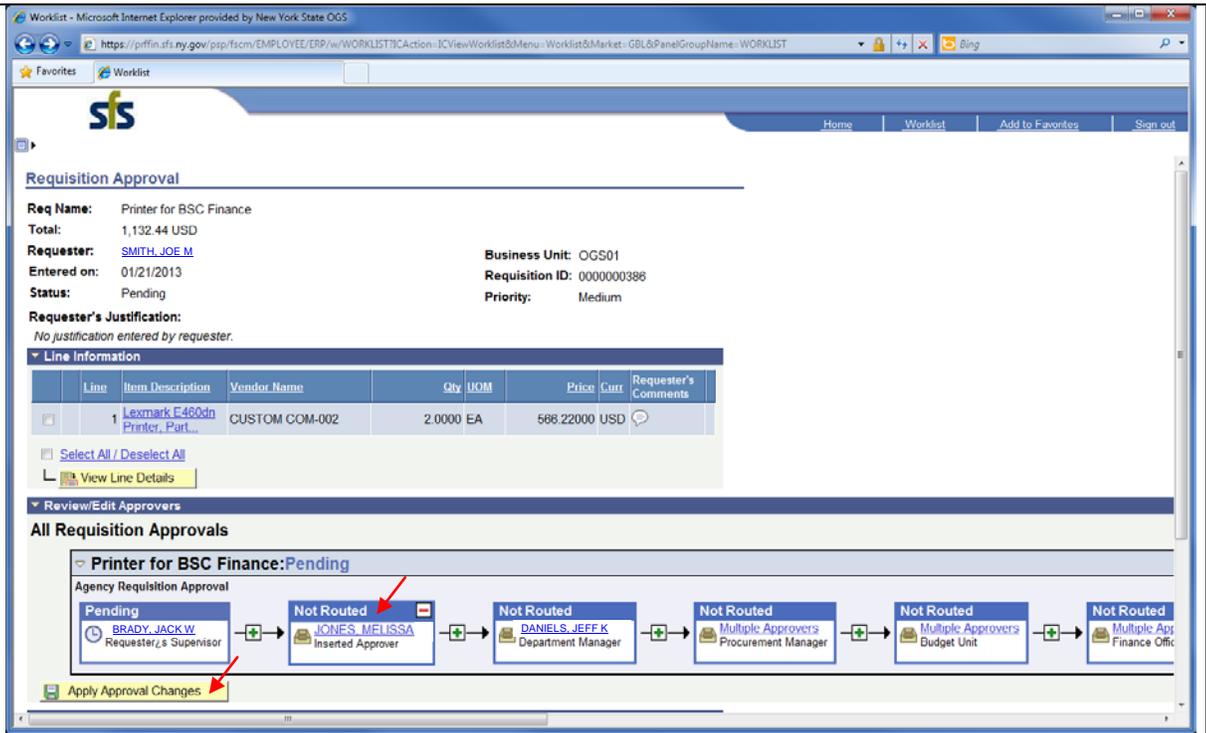
Reviewer

Insert Cancel

Check to see that the additional approver was inserted in the approval chain.

Next, click





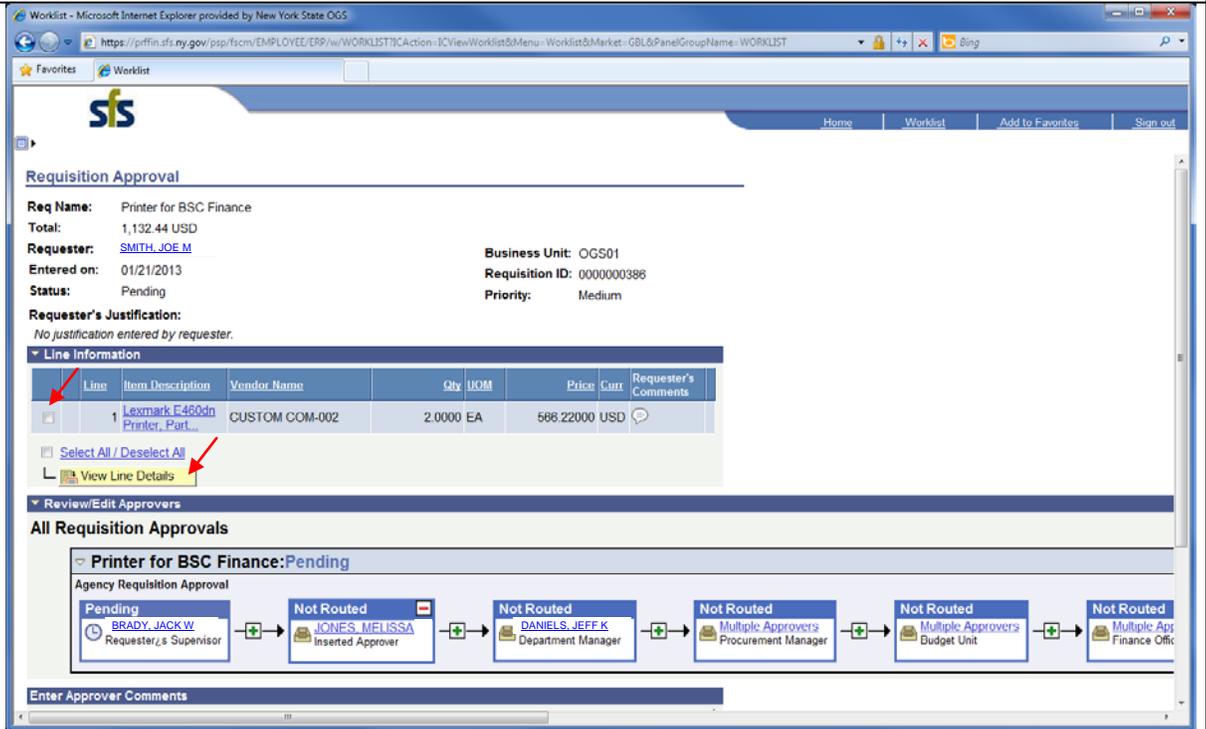
The **Line Information** should be reviewed before approving the requisition.

To view the **Line Details**, select the check box



Click





All information should be carefully reviewed to make sure it is accurate.

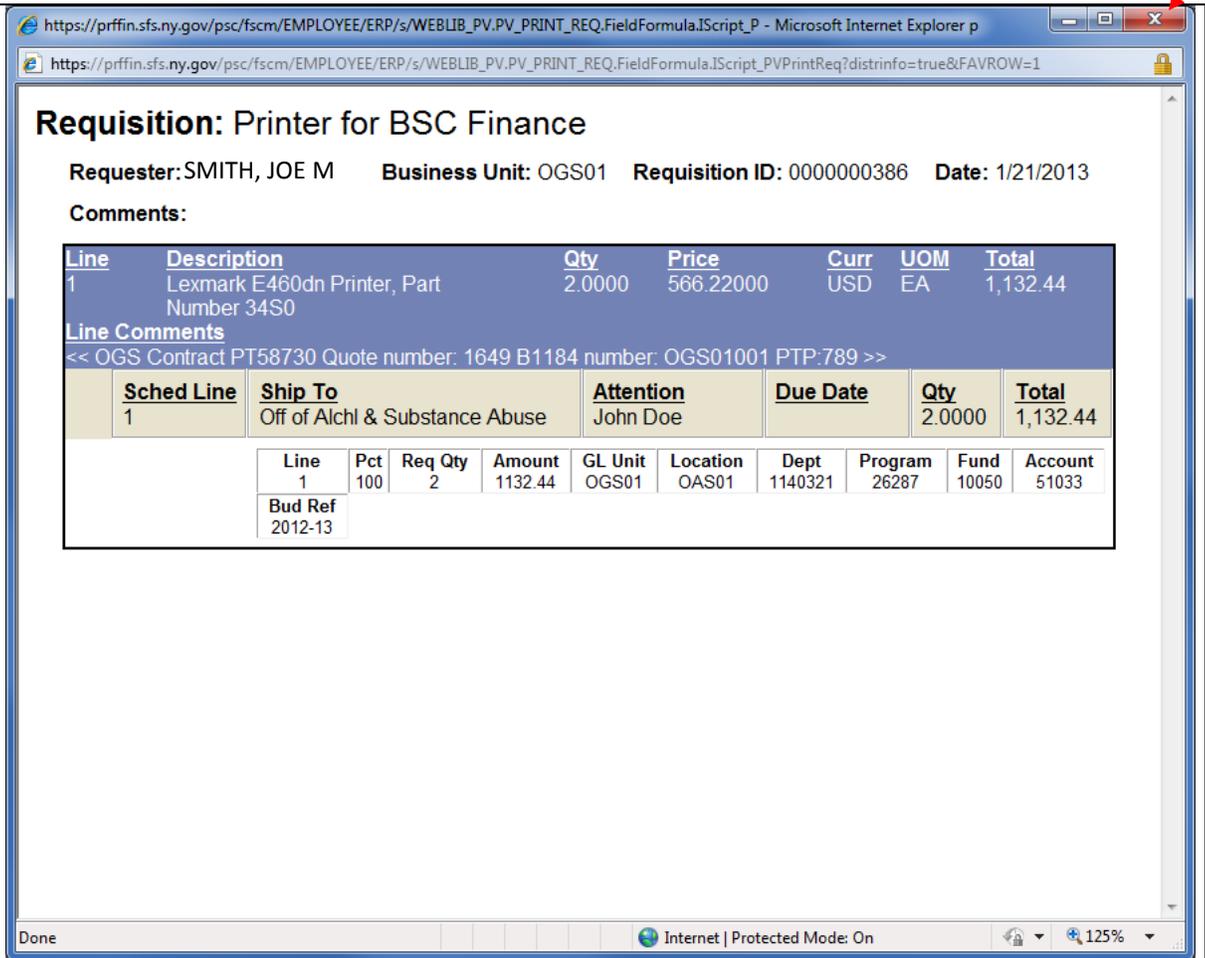
If the requisition is okay as is, move on to the **Approve** section (see page 13).

If the requisition requires more information or alteration, it must be returned to the requestor. Move on to the **Deny** section (see page 13).

If the requisition is no longer needed, move on to the **Deny** section.

Click the exit button .

NOTE: at this stage the Budget Unit is the only approver that can alter ChartField information.



Requisition: Printer for BSC Finance

Requester: SMITH, JOE M **Business Unit:** OGS01 **Requisition ID:** 0000000386 **Date:** 1/21/2013

Comments:

Line	Description	Qty	Price	Curr	UOM	Total
1	Lexmark E460dn Printer, Part Number 34S0	2.0000	566.22000	USD	EA	1,132.44

Line Comments
 << OGS Contract PT58730 Quote number: 1649 B1184 number: OGS01001 PTP:789 >>

Sched Line	Ship To	Attention	Due Date	Qty	Total
1	Off of Alchl & Substance Abuse	John Doe		2.0000	1,132.44

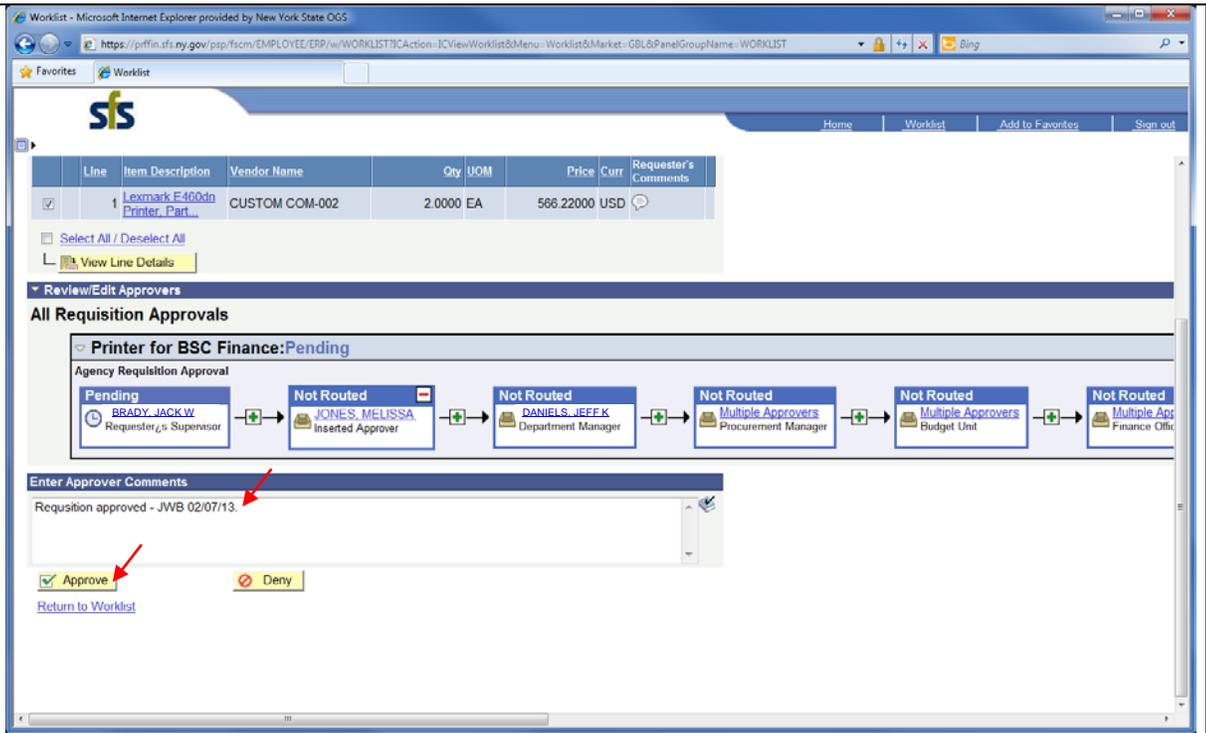
Line	Pct	Req Qty	Amount	GL Unit	Location	Dept	Program	Fund	Account
1	100	2	1132.44	OGS01	OAS01	1140321	26287	10050	51033

Bud Ref
2012-13

Approve

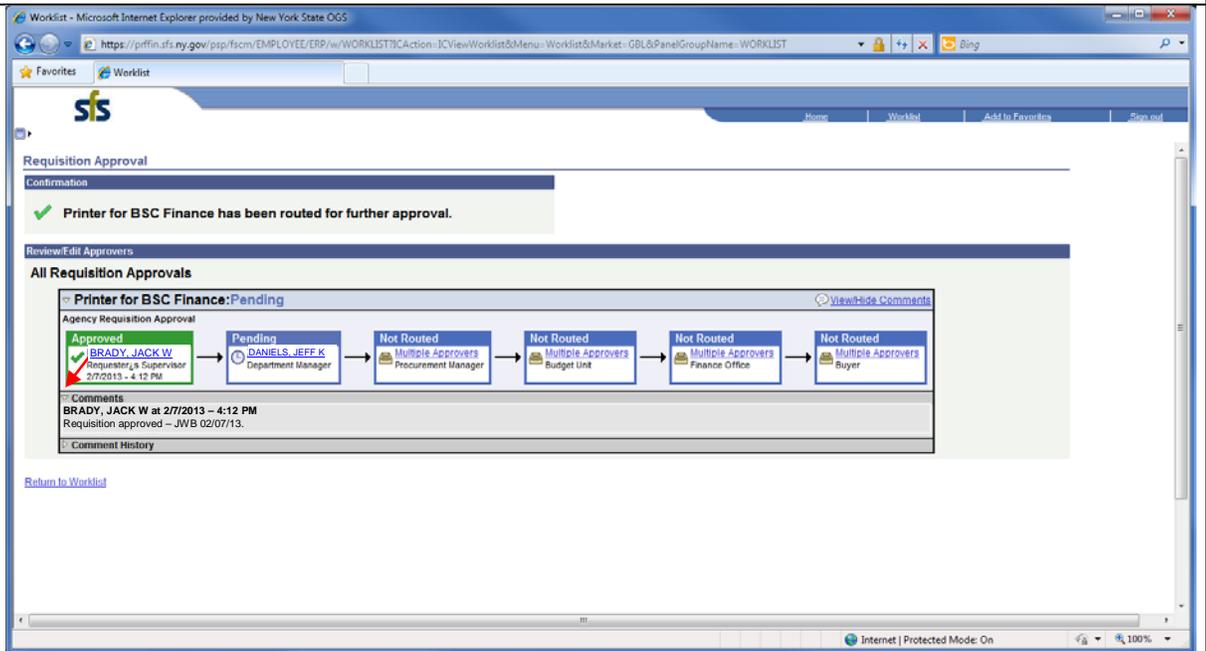
Enter Approver Comments regarding the decision, if you wish. This field is not required.

Click **Approve**.



To view **Comments**, click drop down menu.

The requisition has been routed for further approval. The Budget Unit, Finance Office, and Buyer follow the same process.



Deny

To deny, it is required that **Approver Comments** be entered regarding the decision.

Click **Deny**.

Worklist - Microsoft Internet Explorer provided by New York State OGS

https://pffin.sfs.ny.gov/psp/fscm/EMPLOYEE/ERP/w/WORKLIST?Action=ICViewWorklist&Menu=Worklist&Market=GBL&PanelGroupName=WORKLIST

Worklist

Line	Item Description	Vendor Name	Qty	UOM	Price	Curr	Requester's Comments
1	Lexmark E460dn Printer, Part...	CUSTOM COM-002	2.0000	EA	566.22000	USD	

Select All / Deselect All

View Line Details

Review/Edit Approvers

All Requisition Approvals

Printer for BSC Finance: Pending

Agency Requisition Approval

Pending BRADY, JACK W Requester's Supervisor

Not Routed JONES, MELISSA Inserted Approver

Not Routed DANIELS, JEFF K Department Manager

Not Routed Multiple Approvers Procurement Manager

Not Routed Multiple Approvers Budget Unit

Not Routed Multiple Approvers Finance Office

Enter Approver Comments

Three printers are now required, please alter the requisition - JWB 02/07/13.

Approve Deny

Return to Worklist

To view **Comments**, click drop down menu.

The requisition has been returned to the requester. The requester can access the denied requisition and edit or cancel the requisition depending on the need.

Worklist - Microsoft Internet Explorer provided by New York State OGS

https://pffin.sfs.ny.gov/psp/fscm/EMPLOYEE/ERP/w/WORKLIST?Action=ICViewWorklist&Menu=Worklist&Market=GBL&PanelGroupName=WORKLIST

Worklist

Requisition Approval

Confirmation

Printer for BSC Finance has been denied.

Review/Edit Approvers

All Requisition Approvals

Printer for BSC Finance: Denied

Agency Requisition Approval

Denied BRADY, JACK W Requester's Supervisor 2/7/2013 - 2:54 PM

Not Routed JONES, MELISSA Inserted Approver

Not Routed DANIELS, JEFF K Department Manager

Not Routed Multiple Approvers Procurement Manager

Not Routed Multiple Approvers Budget Unit

Not Routed Multiple Approvers Finance Office

Comments

BRADY, JACK W at 2/7/2013 - 4:12 PM

Three printers are now required - JWB 02/07/13.

Return to Worklist