Understanding the Approval Workflow

- Once a requisition is submitted, it is automatically routed through the appropriate approval workflow based on the type of purchase, dollar amount, funding source, and other institutional requirements. The applicable workflow for your purchase is displayed on the **right-hand side of the requisition**.
- The workflow begins with an initial **budget check** to verify that sufficient funding is available. If funding is not available, the requisition will fail and be returned to a draft cart for correction.
- Approval routing is based on the total value of the requisition:
    - **Purchases under $5,000** are routed to the **Budget Authority** identified within the organization's hierarchy.
    - **Purchases of $5,000 or more** are routed to the appropriate **Delegated Authority** for approval based on the Division.
- Depending on the nature of the purchase, additional workflow reviews may be required, including:
    - **Capital Expenditure Review**
    - **Lab Fee Expense Review**
    - **Environmental Health and Safety (EHS) Review**
    - **Integrated Communications and Marketing Review**
    - **Sponsored Research Review**
    - **Information Technology (IT) Review** for hardware and software purchases
- Only the workflow steps that apply to your specific purchase will be displayed. As approvals are completed, the requisition automatically advances to the next required reviewer.
- After all approvals have been completed, the requisition undergoes a final **budget check** before proceeding to purchase order creation.
- **Important:** Budget validation occurs twice during the requisition process: once at the beginning of the workflow and again after all approvals have been completed. Sufficient funds must be available at both stages for the requisition to proceed.