

REQUISITION APPROVAL

AUTHORIZED REQUESTERS AND AUTHORIZED APPROVERS

CHAPTER 4



Bowie State University
September 2010

APPROVING A REQUISITION

Overview

In this chapter we will be looking at how to approve a Requisition. Most Authorized Requesters should also be Authorized Approvers. If you are not an Authorized Approver, workflow will notify the authorized approver that there is a requisition that requires approval.

Since you Budget Checked the requisition before submitting, all that remains before the requisition can be sourced to a purchase order (PO) is the approval. All requisitions must be approved by the Authorized Approver for the Requester. All requisitions for Grants must also be approved by the Grants Office.

When you click the Save and Submit button, the newly created requisition is routed through Workflow to the Authorized Approver.

Once a purchase requisition has been entered into the system the Authorized Approver can approve it at any time. The system will save the purchase requisition in an *Open* status until it has been approved.

Objectives

By the end of this chapter, you will be able to:

- Successfully Approve a Requisition

Reviewing the Worklist

As an Authorized Approver, the requisitions that require your approval will be in your Worklist.

The quickest way to view the items that require your approval is to click the Worklist hyperlink on the navigation header. The navigation header is present on all pages so you may click it at any time.

A summary view of the items requiring approval will be displayed.

Navigation

- Sign in
- Click Worklist

From	Date From	Work Item	Worked By Activity	Priority	Link
Bowie Requester	08/26/2010	Approval Routing	Approval Workflow	2-Medium	Requestion 192, Bowie 1 2010-08-26 10:00:00
Bowie Requester	08/26/2010	Approval Routing	Approval Workflow	2-Medium	Requestion 195, Bowie 1 2010-08-26 10:00:00

Basic information on the requisition is displayed. This includes:

<i>From</i>	The ID of the Requester.
<i>Date From</i>	The date the requisition was submitted.
<i>Work Item</i>	The status of the item.
<i>Worked by Activity</i>	The last person to work on the item.
<i>Priority</i>	The priority to process the item.
<i>Link</i>	A URL to review the Requisition if required. Click on the link to review and approved.
<i>Mark Worked</i>	If available, you can change the status to show that it has been worked.
<i>Reassign</i>	If available, click to reassign to another approver.

Requisition Approval

When you click on the **Link** for the item, the *Requisition Approval* page is displayed.

Navigation

- eProcurement
- Worklist
- Click **Link** for a worklist item

ORACLE

Favorites | Main Menu > Worklist > Worklist

Home | Worklist | Add to Favorites | Sign Out

Requisition Approval

Business Unit: BSU
Requisition ID: 0000015753
Requisition Name: Ext HD for CTRLR laptops
Requester: [Bowie Requester](#)
Entered on: 08/25/2010
Status: Pending
Priority: Medium
Budget Status: Not Checked
Total Amount: 917,93 USD
Requester's Justification: No justification entered by requester

[View printable version](#)

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price
1	Mr Passport Essential SE - 1	BESTBUYGOV-001	2.0000	EA	169.99000 USD
2	Mr Passport Essential - 540	BESTBUYGOV-001	2.0000	EA	110.49000 USD
3	Mr Passport Elite - 640 GB	BESTBUYGOV-001	3.0000	EA	118.99000 USD

☐ Select All / Deselect All
[View Line Details](#)

Review/Edit Approvers

Enter Approver Comments

☐ Approve ☐ Deny

[Return to Worklist](#)

Open the **Review/Edit Approvers** section to display information on the approvers.

ORACLE

Favorites | Main Menu > Worklist > Worklist

Home | Worklist | Add to Favorites | Sign Out

Requisition Approval

Status: Pending
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Budget Status: Not Checked
Total Amount: 917,93 USD
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☐ Select All / Deselect All
[View Line Details](#)

Review/Edit Approvers

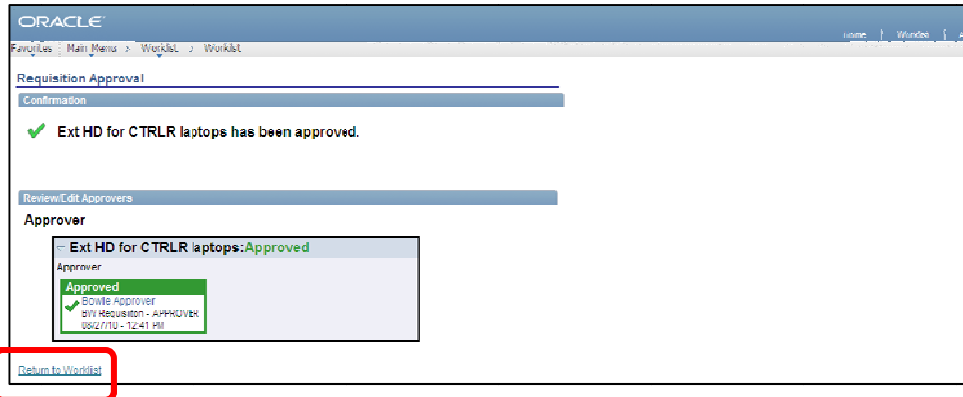
Approver
Ext HD for CTRLR laptops: Pending Bowie Requester APPROVER

Enter Approver Comments

☐ Approve ☐ Deny

Review the information on the requisition and click the buttons to **Approve** or **Deny**. If you choose to deny, you should give your reason for denial in the **Enter Approver Comments** field.

When you click **Approve**, the verification page appears.



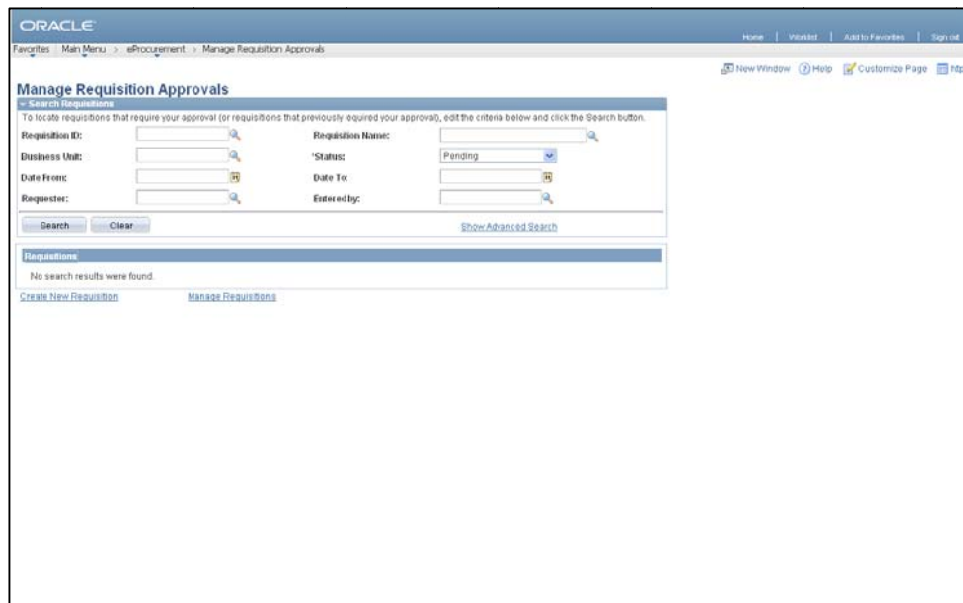
Click the **Return to Worklist** hyperlink to return to the worklist for additional approvals.

Managing Approvals

You can also work through your approvals using the *Manage Approvals* component.

Navigation

- eProcurement
- Manage Requisition Approvals



The page will open with the requisitions that you have been assigned to approve.

The **Search Criteria** section is located at the upper portion of the page. You can use it to search for specific requisitions and review additional requisitions to those you have already approved. This criteria includes the following fields.

Requisition ID

The ID assigned by the system to the requisition.

Requisition Name

The name (description) given to the requisition by the requester.

Business Unit

This should be **BSU**.

Status

The default is *Pending*. Other options include: *Approved, Denied, On Hold, Pushed Back*.

Date From

The first requisition date to include in the search.

Date To

The last requisition date to include in the search.

Requestor

The ID of the approved requestor who submitted the requisition.

Entered By

The ID of the person who entered the requisition, if not the approved requestor.

Click **Search** to display the requisitions that match the specified criteria.

Navigation

- eProcurement
- Manage Requisitions
- Enter criteria
- Click **Search**

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Manage Requisition Approvals

New Window | Help | Customize Page | http

Manage Requisition Approvals

Search Requisitions

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Request ID: Request Name:

Business Unit: *Status:

Date From: Date To:

Requester: Entered by:

[Show Advanced Search](#)

Requisitions

To view the complete details and approve a Requisition, click the requisition ID link.

[Expand All](#) [Collapse All](#)

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requestor	Entered By	Total
Pending	000015752	New computer for Janet West	BSU	08/25/2010	Bowie Requestor	Bowie Requestor	1,119.00 USD

[Create New Requisition](#) [Manage Requisitions](#)

Click the *Expand Section* icon to view summary information on the requisition.

Navigation

- eProcurement
- Manage Requisitions
- Click **Expand Section** icon for requisition

Manage Requisition Approvals

Search Requisitions

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID: Requisition Name:

Business Unit: *Status:

Date From: Date To:

Requester: Entered By:

[Show Advanced Search](#)

Requisitions

To view the complete details and approve a Requisition, click the requisition ID link.

[Expand All](#) [Collapse All](#)

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
Pending	0000015752	New computer for Janet West	BSU	08/25/2010	Bowie Requester	Bowie Requester	1,199.00 USD

Summary: Requisition Pending Total Pending: 1,199.00 USD Priority: Medium

Justification: No justification entered by requester.

Lines

Requisition Details	Item Details	Vendor Name	Price	Qty	UOM
Pending	1 Studio XPS Laptop	Dell Marketing L.P.	1,199.00 USD	1,0000	Each

[Create New Requisition](#) [Manage Requisitions](#)

This displays summary information on the requisition. To review the actual requisition, click the hyperlink identifier of the requisition.

Navigation

- eProcurement
- Manage Requisitions
- Click **Expand Section** icon for requisition
- Click hyperlinked ID

Requisition Approval

Business Unit: BSU

Requisition ID: 0000015752

Requisition Name: New computer for Janet West

Requester: [Bowie Requester](#)

Entered on: 08/25/2010

Status: Pending

Priority: Medium

Budget Status: Not Checked

Total Amount: 1,199.00 USD

Requester's Justification: No justification entered by requester.

[View printable version](#)

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price
1	Studio XPS Laptop	DELLMARKET-001	1,0000	EA	1,199.00000 USD

[Select All / Deselect All](#) [View Line Details](#)

Review/Edit Approvers

Enter Approver Comments

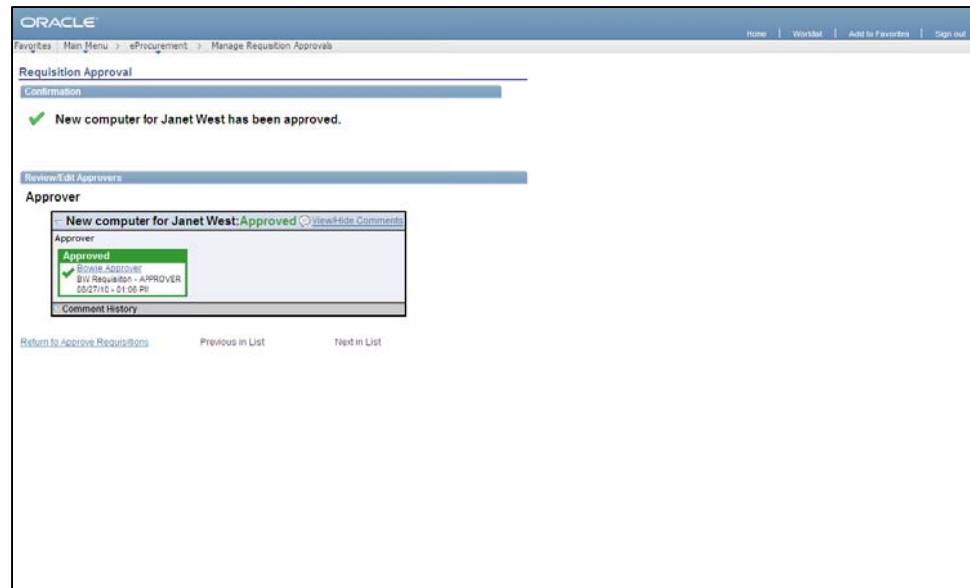
[Return to Approve Requisitions](#) [Approval History](#) [Previous in List](#) [Next in List](#)

Review the information and click the Review the information on the requisition and click the buttons to **Approve** or **Deny**. If you choose to deny, you should give your reason for denial in the **Enter Approver Comments** field.

When you click **Approve**, the verification page appears.

Navigation

- eProcurement
- Manage Requisitions
- Click **Expand Section** icon for requisition
- Click hyperlinked ID
- Click **Approve**

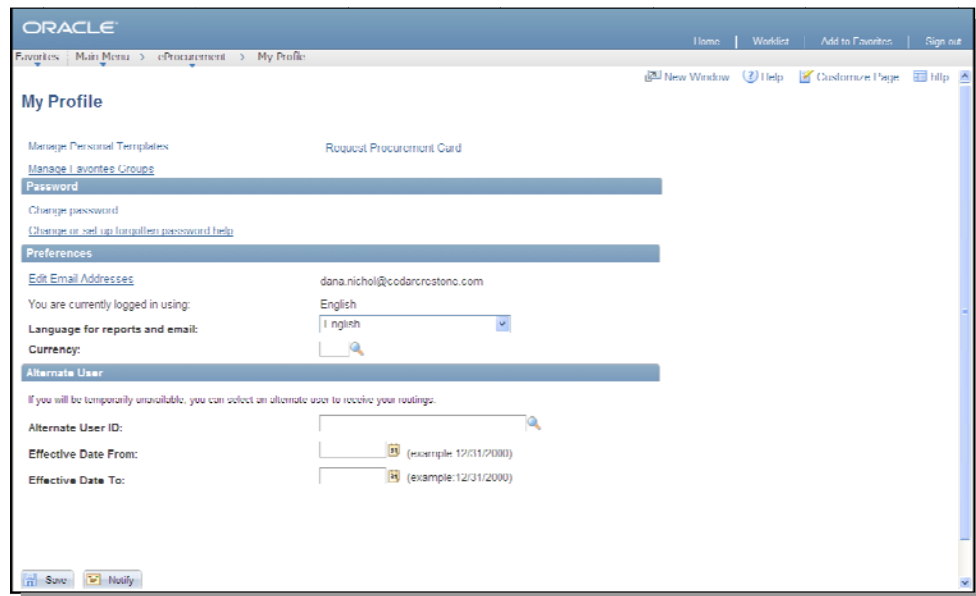


Delegating Approvals

eProcurement also offers a way to delegate approval authority to another authorized approver when you will be away from the office for several days. The delegation works in much the same way you would use an “Out of Office” assistant in your e-mail.

Navigation

- eProcurement
- My Profile



The Alternate User section is where you will record this information.

Alternate User ID

The ID for the authorized approver to whom the approvals should be routed.

Effective Date From: The first date the approvals should be routed to the designated approver.

Effective Date To: The last date the approvals should be routed to the designated approver.

Click **Save** to record the information. The system will forward the approvals to the designated authorized approver during the dates specified.