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# PURCHASING USER MANUAL

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## APPROVE OR REJECT A REQUISITION

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### INTRODUCTION

Requisitions, or requisition line items, generally are approved based on the workflow they are assigned to. A workflow is the path for routing a requisition to a person or a group of people for approval.

- At least one workflow is required for any agency.
- Each workflow can have as many approval levels and as many approvers as needed.
- A requisition can be made up of several line items and each can be assigned to different workflows. Therefore a requisition may need to be approved by several different approvers before it is ready for purchasing.
- The requisition line items and the approvers must be assigned to the same workflow in order for the approvers to be able to approve those line items.

In addition, your agency may use Requisition Departments for the approval process. If your Purchasing administrator restricts approvals by department, the approvers must be assigned to the same Requisition Department as a requisition in order to approve it.

Furthermore, your Purchasing administrator may set up approver rules for each approver, restricting them to approving items based on dollar amount or a certain type of fiscal code(s).

Finally, your Purchasing administrator may enable certain approval restrictions, such as restricting approvers from approving their own requisitions.

See the [Requisitions You Are Unable to Approve](#) section for more information.

### APPROVE A REQUISITION OR REQUISITION LINE ITEM

Depending on your agency's process and the role you have been assigned by your administrator

1. Open a requisition to approve one of two ways:
  - Click **Approve** next to a requisition on the **Status** screen (The **Status** may be **Awaiting Line Approval** or **Awaiting Requisition Approval**, depending on the status of the line items in a requisition.)

- Click the **Approval** tab if you have completed the fiscal coding of the requisition, are authorized to approve your own requisition, and now need to approve it.

Figure 1 - Status screen

The screenshot shows the 'Status' tab selected. Search filters include Req #, Tracking #, Status (Active or recently received), Request Date Range (All Requisitions), and Departments (-My Departments-). A table lists requisitions with columns: Trk #, Req #, Requester, Req'd Date, Description, and Status.

Trk #	Req #	Requester	Req'd Date	Description	Status
Fiscal	207	DSA08003 SUANNE	03/13/2008	ITEMS	Awaiting Fi
Approve	212	DSA08007 JAMES	03/17/2008	Leatherman Wave	Awaiting Li
Select	98	SYS07001 MERIDETH	11/13/2007		Ready for P
Select	204	DSA08002 DAI	03/13/2008		Ready for P

- Click the **Req Notes**, **Req Atch**, or the line item **Notes** and/or attachments (**Atch**) to review any information that helps you determine whether or not to approve the requisition line items.

Figure 2 - Notes and Attachments icons

The screenshot shows the 'Approval' tab. It displays requisition details for Department: DSA, Req #: DSA08007, Tracking #: 212, and Description: Leatherman Wave. The status is 'Awaiting Line Approval'. There are buttons for 'Req Notes' and 'Req Atch' circled in red. Below the details is a table with columns: Notes, Atch, Status, Item #, Description, Qty, U/M, Price, SubTotal, Encumb, Sfx, Mod, TC, R, Index, PCA, SubObj, Dtl.

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Encumb	Sfx	Mod	TC	R	Index	PCA	SubObj	Dtl
Menu				Awaiting Worker Level 1 877	6	Each	\$70.00	\$420.00						230	3512	01030	5101

- Check the **Show Fiscal Coding Titles** check box to display and review the fiscal code titles. (An approver cannot change fiscal coding, but can reject a line item for fiscal coding changes.)

Figure 3 – Show Fiscal Coding Titles

The screenshot shows the 'Approval' tab with 'Show Fiscal Coding Titles' checked. A table displays requisition details with columns: Description, Qty, U/M, Price, SubTotal, Encumb, Sfx, Mod, TC, R, Index, Title, PCA, Title. A red arrow points from the 'Show Fiscal Coding Titles' checkbox to the 'Title' column.

Description	Qty	U/M	Price	SubTotal	Encumb	Sfx	Mod	TC	R	Index	Title	PCA	Title
Leatherman Wave	6	Each	\$70.00	\$420.00						230	3512	DSP REAPPROPRIA	01030 STATEWIDE PAYRO 5

- You can also move your mouse pointer over a fiscal code to display the title in the browser's status bar.

Figure 4 - Use mouse pointer to display title

The screenshot shows the 'Approval' tab with 'Show Fiscal Coding Titles' checked. A table displays requisition details with columns: Notes, Atch, Status, Item #, Description, Qty, U/M, Price, SubTotal, BU, Title, Fund Dtl, Title, Inv#, SecA, S. A red circle highlights the fiscal code '0001' in the 'Title' column. A red arrow points from this circle to the browser's status bar, which displays 'GENERAL FUND 67-1205,67-1210'.

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	BU	Title	Fund Dtl	Title	Inv#	SecA	S
Menu			34455	Hammer	3	Each	\$29.99	\$89.97	SCBA		0001	GENERAL FUND 67-			
Menu			10222	Nails	2	Box	\$9.99	\$19.98	SCBA		0001	GENERAL FUND 67-			

5. Check the **Show Vendor Info** check box to display and review the vendor information, if available.
6. Click **Menu** next to a line item and click **Show Full Description** to display the full text of the **Description** field.
7. Approve the requisition or requisition line items:
  - a. To approve *all line items* of the requisition, click the **Approve** button. The **Approve** button will only be active if the approver has rights to approve every line item.
  - b. To approve *individual line items* of the requisition, click **Menu** next to a line item, and then click **Approve Line Item**. Click **OK** when prompted.

Figure 5 - Approve button and Menu

Status: Awaiting Line Approval

Approve Reject All

Total: \$420.00  Show Vendor Info  Show Fiscal Coding Titles

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Encumb	Sfx	Mod	IC	R	Index	PCA	SubObj	D
		Awaiting	Worker Level 1	Leatherman Wave	6	Each	\$70.00	\$420.00									

Menu

- Approve Line Item
- Reject Line Item
- Show History
- Show Full Description
- View Ship-To Address
- View Bill-To Address

8. When finished approving, the requisition status will be **Ready for Purchasing**.

## REJECT A REQUISITION OR REQUISITION LINE ITEM

Reject a line item or requisition so that it can be updated or removed by the requester.

1. To reject *all* line items of the requisition, click **Reject All**. If your Purchasing administrator has enabled e-mail notification, an e-mail will be sent automatically to the requester. Click **OK** when prompted.
2. To reject an individual line item of the requisition, click **Menu** next to a line item, and then click **Reject Line Item** (or **Reject all lines** if it is an "All or nothing" requisition). Click **OK** when prompted.
3. If your Purchasing administrator has enabled e-mail notification, an e-mail will be sent automatically to the requester.
4. The requester can then update the line item or requisition as needed and resubmit it for fiscal coding and approval.
5. After the final approval, a requisition can only be rejected or cancelled by a purchaser.

## REQUISITIONS YOU ARE UNABLE TO APPROVE

Shaded requisitions or line items are ones that you cannot approve. On the **Status** screen, click **Approve** to open the requisition as you would to approve, and then click the shaded line item's **Menu**, and then click and **Show Reason** to find out why you cannot approve the item.

Figure 6 – Items you cannot approve



There may be restrictions set by your Purchasing administrator, such as:

- You are not part of the requisition workflow.
- You are not part of the Requisition Department and your administrator has restricted approvals by department.
- The line item(s) has fiscal coding or a dollar amount which your approval rules do not allow you to approve.
- You created the requisition and you are an approver, but the administrator has restricted approvers from approving their own requisitions.