

# Reviewing / Approving a Requisition/PO

## Reviewing/Approving Overview



- + From the **Approvals** tab on the Procure+ Home page you can review any requisitions or purchase orders created by other users and submitted to you for your review.

The screenshot displays the Procure+ web application interface. At the top, there is a navigation bar with the 'e+' logo on the left, a 'Welcome Jackie Admin' message in the center, and 'Help', 'About', and 'Logout' links on the right. Below the navigation bar is a menu with the following items: Home, Requisitioning, Purchasing, Sourcing, Inventory, Invoicing, Assets, Reporting, Navigator, Options, Approvals, and System Administration. The main content area features a section titled 'Action Items' with a blue header. Below this header, there are six items, each with a count in a small box and a description:

|   |                           |    |                               |   |                               |
|---|---------------------------|----|-------------------------------|---|-------------------------------|
| 0 | Items in my shopping cart | 10 | Requisitions in process       | 2 | Requisitions ready to receive |
| 7 | Open Purchase Orders      | 0  | Requirements in Buyer's Queue | 7 | POs Past Due                  |

# Reviewing / Approving a Requisition/PO



## Reviewing/Approving Overview

- + *Approval* refers to a requisition or purchase order that has not yet been sent to the appropriate supplier(s) for fulfillment because the requisition/purchase order is in the process of first being reviewed/approved internally within the organization. A requisition/purchase order is a pending requisition/purchase order until the last step (internal to the organization) of the applicable procurement workflow approves the requisition/purchase order for fulfillment.

Home Requisitioning Purchasing Sourcing Inventory Invoicing Reporting Navigator Options System Administration Help

History Approve Selected Items Deny Selected Items

### Approval Review

67 Possible Approval(s)

**Approvals**

| Select                                    | Type | Transaction  | Center | Approval Level            | Date Entered | On Behalf of Or Buyer      | Monetary Value |
|---|------|--------------|--------|---------------------------|--------------|----------------------------|----------------|
| <input type="checkbox"/>                  | REQ  | REQ 160215 0 |        | IT DIRECTOR               | 10/21/10     | BRADFORD, KENNETH          | 60,547.50      |
| You are Override Approver for: IT MANAGER |      |              |        |                           |              |                            |                |
| <input type="checkbox"/>                  | REQ  | REQ 161174 0 |        | VP- IR AND COMMUNICATIONS | 10/08/10     | CERMAK, CLIFF              | 429.75         |
| <input type="checkbox"/>                  | REQ  | REQ 161475 0 |        | IT DIRECTOR               | 10/17/10     | IT APPLICATIONS AND DESIGN | 60,800.00      |
| You are Override Approver for: IT MANAGER |      |              |        |                           |              |                            |                |

# Reviewing / Approving a Requisition/PO

## Reviewing/Approving Overview



- + For example, a manager is responsible for reviewing orders submitted by the staff the manager supervises.

In this case, when any of the manager's staff creates an order, Procure+ routes the order as a pending requisition to the manager for review and approval.

- + With the **Approvals** tab you can view the complete list of requisitions and purchase orders that have been submitted for your review/approval, including reviewing a submitted requisition/purchase order and responding to it by selecting from any of the options for routing the requisition/purchase order.

Home | Requisitioning | Purchasing | Sourcing | Inventory | Invoicing | Reporting | Navigator | Options | System Administration | Help | Abc

History | Approve Selected Items | Deny Selected Items

### Approval Review

67 Possible Approval(s)

**Approvals**

| Select                                    | Type | Transaction    | Center               | Approval Level            | Date Entered | On Behalf of Or Buyer      | Monetary Value |
|---|------|----------------|----------------------|---------------------------|--------------|----------------------------|----------------|
| <input type="checkbox"/>                  | REQ  | ▼ REQ 160215 0 |                      | IT DIRECTOR               | 10/21/10     | BRADFORD, KENNETH          | 60,547.50 U    |
| You are Override Approver for: IT MANAGER |      |                |                      |                           |              |                            |                |
| <input type="checkbox"/>                  | REQ  | ▼ REQ 161174 0 |                      | VP- IR AND COMMUNICATIONS | 10/08/10     | CERMAK, CLIFF              | 429.75 U       |
| <input type="checkbox"/>                  | REQ  | ▼ REQ 161475 0 |                      | IT DIRECTOR               | 10/17/10     | IT APPLICATIONS AND DESIGN | 60,800.00 U    |
| You are Override Approver for: IT MANAGER |      |                |                      |                           |              |                            |                |
| <input type="checkbox"/>                  | REQ  | ▼ REQ 163137 0 | SFW-WHSE<br>SFW-WHSE | SFW INVENTORY GATEKEEPER  | 10/21/10     | CROWDER, CHERIE            | 6,037.50 U     |

# Reviewing / Approving a Requisition/PO

## Reviewing/Approving Overview



The screenshot shows the 'Approval Review' page in Procure+. At the top, there is a navigation bar with links for Home, Requisitioning, Purchasing, Sourcing, Inventory, Invoicing, Reporting, Navigator, Options, System Administration, Help, About, and Logout. Below this is a sub-navigation bar with 'History', 'Approve Selected Items', and 'Deny Selected Items'. The main heading is 'Approval Review' with a sub-note '67 Possible Approval(s)'. A tab labeled 'Approvals' is active. The main content is a table with the following columns: Select, Type, Transaction, Center, Approval Level, Date Entered, On Behalf of Or Buyer, and Monetary Value. The table lists five requisitions, with two of them having a note: 'You are Override Approver for: IT MANAGER'.

| Select                                    | Type | Transaction  | Center               | Approval Level            | Date Entered | On Behalf of Or Buyer      | Monetary Value |
|---|------|--------------|----------------------|---------------------------|--------------|----------------------------|----------------|
| <input type="checkbox"/>                  | REQ  | REQ 160215 0 |                      | IT DIRECTOR               | 10/21/10     | BRADFORD, KEIWIETH         | 60,547.50 USD  |
| You are Override Approver for: IT MANAGER |      |              |                      |                           |              |                            |                |
| <input type="checkbox"/>                  | REQ  | REQ 161174 0 |                      | VP- IR AND COMMUNICATIONS | 10/08/10     | CERMAK, CLIFF              | 429.75 USD     |
| <input type="checkbox"/>                  | REQ  | REQ 161475 0 |                      | IT DIRECTOR               | 10/17/10     | IT APPLICATIONS AND DESIGN | 60,800.00 USD  |
| You are Override Approver for: IT MANAGER |      |              |                      |                           |              |                            |                |
| <input type="checkbox"/>                  | REQ  | REQ 163137 0 | SFW-WHSE<br>SFW-WHSE | SFW INVENTORY GATEKEEPER  | 10/21/10     | CROWDER, CHERIE            | 6,037.50 USD   |
| <input type="checkbox"/>                  | REQ  | REQ 163138 0 | SFW-WHSE<br>SFW-WHSE | SFW INVENTORY GATEKEEPER  | 10/21/10     | CROWDER, CHERIE            | 3,501.75 USD   |

+ Depending on how your organization has configured its Procure+ site, Procure+ may notify you via email each time a requisition is submitted to you for your review.

The subject line and body of the email depend on how your organization has configured its procurement workflow(s).

To review the requisition, simply open the email, and then click the link in the body of the email.

Procure+ prompts you to log into your organization's site and then displays the requisition.

# Reviewing / Approving a Requisition/PO

## Reviewing/Approving the Requisition or Purchase Order



Home Requisitioning Purchasing Sourcing Inventory Invoicing Reporting Navigator

History Approve Selected Items Deny Selected Items

### Approval Review

1 Possible Approval(s)

**Approvals**

| Select                   | Type | Transaction  | Center                     | Approval Level |
|--------------------------|------|--------------|----------------------------|----------------|
| <input type="checkbox"/> | REQ  | REQ 161174.0 | VP- IR AIND COMMUNICATIONS |                |

- Review Requisition Information
- Approve
- Deny
- View Detail
- View Approvals
- Notes

+ To approve a requisition/purchase order, click **Approve** for the requisition/purchase order.

Procure+ routes the approved requisition/purchase order to the next step/level in the approval (workflow) process the requisition/purchase order is assigned to, and then displays a confirmation message.

# Reviewing / Approving a Requisition/PO

## Reviewing/Approving the Requisition or Purchase Order



Home Requisitioning Purchasing Sourcing Inventory Invoicing Reporting Navigator Options System Admin

History Approve Selected Items Deny Selected Items

### Approval Review

1 Possible Approval(s)

Approvals

| Select                   | Type | Transaction  | Center                    | Approval Level | Date Entered |
|--------------------------|------|--------------|---------------------------|----------------|--------------|
| <input type="checkbox"/> | REQ  | REQ 161174 0 | VP- IR AND COMMUNICATIONS |                | 10/08/10     |

- Review Requisition Information
- Approve
- Deny
- View Detail
- View Approvals
- Notes

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To view requisition/purchase order detail information, click **View Detail**.

The Order/Purchase Order page displays.

# Reviewing / Approving a Requisition/PO

## Reviewing/Approving the Requisition or Purchase Order



Home Requisitioning Purchasing Sourcing Inventory Invoicing Reporting Navigator Options System Admini

History Approve Selected Items Deny Selected Items

### Approval Review

1 Possible Approval(s)

Approvals

| Select                   | Type | Transaction    | Center | Approval Level           | Date Entered |
|--------------------------|------|----------------|--------|--------------------------|--------------|
| <input type="checkbox"/> | REQ  | ▼ REQ 161174 0 |        | VP- IR AND COMMUICATIONS | 10/08/10     |

- Review Requisition Information
- Approve
- Deny
- View Detail
- View Approvals
- Notes

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To view the approval (workflow) process the requisition/purchase order is assigned to, including where the order is in the process, click **View Approvals**.

The Approvals page displays. The Approvals page lists each step of the approval (workflow) process the requisition/purchase order is assigned to.

Each step is color-coded to indicate whether the requisition/purchase order was approved at each step.

# Reviewing / Approving a Requisition/PO

## Denying the Requisition or Purchase Order



Home Requisitioning Purchasing Sourcing Inventory Invoicing Reporting Navigator Options System Adm

History Approve Selected Items Deny Selected Items

### Approval Review

1 Possible Approval(s)

Approvals

| Select                   | Type | Transaction  | Center                    | Approval Level | Date Entered |
|--------------------------|------|--------------|---------------------------|----------------|--------------|
| <input type="checkbox"/> | REQ  | REQ 161174 0 | VP- IR AND COMMUNICATIONS |                | 10/08/10     |

- Review Requisition Information
- Approve
- Deny
- View Detail
- View Approvals
- Notes

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To deny the requisition/purchase order, click **Deny**. Respond to the confirmation message that displays.

The Notify Approver page displays.

To send a notification message to the user who submitted the order, complete the **Message Text** field in the page, and then click **Send Notification and Edit Order Header Internal Notes** or **Send Notification and Return to Approval Review**, depending on whether you want to enter internal header notes.

If you do not wish to send a notification message, clear the **Notify User** check box, and then click **OK**.

# Reviewing / Approving a Requisition/PO

## Viewing Your Approval History



Home Requisitioning Purchasing Sourcing Inventory Invoicing

History Approve Selected Items Deny Selected Items

Show Approval History...

1 Possible Approval(s)

| Select                   | Type | Transaction  | Center | Approval |
|--------------------------|------|--------------|--------|----------|
| <input type="checkbox"/> | REQ  | REQ 161174 0 |        | VP- IR A |

- + To view all requisitions or purchase orders previously submitted to you for your review, click **History**. The Approval History page displays, which lists each requisition and purchase order submitted and reviewed by you. Transactions are listed by date in the page, but you can sort transactions by transaction status as well.
- + Click the **Status** column heading to sort transactions by status.
- + To view order/purchase order detail information for a requisition/purchase order, click the requisition/purchase order's **View Detail** option. The Order/Purchase Order Information page displays.

# Reviewing / Approving a Requisition/PO

## Viewing Your Approval History



History | Approve Selected Items | Deny Selected Items

### Approval Review

1 Possible Approval(s)

Approvals

| Select                   | Type | Transaction  | Center       | Approval Level |
|--------------------------|------|--------------|--------------|----------------|
| <input type="checkbox"/> | REQ  | REQ 161174 0 | VP- IR AND C |                |

- Review Requisition Information
- Approve
- Deny
- View Detail
- View Approvals
- Notes

+ To view the approval process of a requisition/purchase order, click the requisition/purchase order's **View Approvals** option.

The Approvals page displays.

This page lists each step of the approval (workflow) process the order is assigned to.

Each step is color-coded to indicate whether the order was approved at each step.

# Reviewing / Approving a Requisition/PO

## Viewing Your Approval History



- + The page lists each approver of the approval class assigned to the order that applies to the order first, followed by each approver of any approval categories (extended approvals) that apply to the order, with approval category approvers listed by the Processing Order field of each approval category.

Click the **Exit** link to return to the Order List page.

**Exit**

### Requisition Approvals

Requisition : REQ-161174

| Key:   | Approvals Required:   | Approval Sta |
|--|---|--------------|
| <br>Approved                | <br>VP- IR AND COMMUNICATIONS <br><a href="#">Add Approvals</a> | Transaction  |
| <br>Awaiting Approval       |   |              |
| <br>Rejected               |   |              |
| <br>Awaiting Notification |   |              |