



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Approve
Requisitions

DATE DEVELOPED: 07/15/2021

REVISED DATE:

SUBJECT: **Approve Requisitions**

Approving Requisitions

Once a requisition has been created, it needs to be approved in the Approve Requisitions entry point. Initial approvals are part of the Requisition Approval workflow.

Once approvals are complete, the next step is the Requisition Buyer Analysis workflow. Buyers in that workflow will use the [Analyze Requisitions](#) entry point.

Access the Approve Requisitions entry point to view the Traditional Requisition Approval tab.

Requisition Approval(1) Not-To-Exceed Requisition Approval(0) Blanket/Project Requisition Approval(0) History

Filter Criteria

Requisitions to Approve

Approve As: Pruett, Laurie Katherine (7027)

This approval list was compiled for you on 08-09-2021 16:40.

Refresh this list with the most current approval candidates?

Cart Name	Vendor	Contract(s)	Item Number	Organization	Requisition Type	Pick List Status	Pick List Date	Long Description	Unit of Measure	Quantity	Free Quantity Recvd	Unit Price	Total Amount	Account Number(s)
Traditional Lovie Lord 08-09-2021 Cart #1	SWANK MOVIE LICENSING USA(138750)		2541	Purchasing	Traditional			license	EA	1.0		25.00	25.00	199-41-6495-000-729-99-000

1 Record


Requisition Details Cart Details Select All Approve Approve All Reject Void Hold Unhold Notes

Return

Approval tabs are color-coded. Green indicates that there are no requisitions that need to be approved. Red indicates that there are requisitions that need to be approved. On each tab, the number of requisitions that need to be approved is displayed in parentheses.

If you are approving Not-To-Exceed Requisitions or Blanket/Project Requisitions, bring that tab forward, and skip to [step 5](#).

Filtering

Click the  to expand the Filter Criteria panel.



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In the Filter Criteria panel, select your criteria.

- Enter the name of the Vendor by which to filter the list, or click the  icon to select one from the Vendor Lookup tab.
- Select the requisition Category.

- Enter the name of the Requisitioner, or click the  icon to select one from the Employee Lookup tab.
- Select the Status of the requisition.
- In the Requisitioned On field, enter a date on which the requisition was created.
- In the Requisitioned To field, enter the date of the end of the requisition.

Click the Filter button to filter the Requisitions to Approve list based on your criteria.

Bring the appropriate tab forward and highlight to select the requisition you want to approve.

- To review and/or edit the requisition before approving it, click the View button. The Requisition Overview tabs are displayed. See Maintain Requisitions.

Tip: To approve all of the requisitions in the Requisitions to Approve list and click the Approve All button. If you want to approve most of the items in the list, click the Select All button, and deselect the item(s) you do not want to approve, and click the Approve button.

Click the Approve button. A message tells you that the requisition(s) you selected were approved.



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- You can view the History tab to track the progress of the requisition you just submitted for approval.

Viewing Requisition Details

To view the details of Blanket/Project or Not-to-Exceed Requisitions, click the View button.

To view the details of and/or edit a requisition before approving it, click the requisition in the Requisitions to Approve list, and click the Requisition Details button to view the Requisition Overview tabs. For more information about this tab and navigation bar, see Maintain Requisitions.

After viewing and/or editing information on the Cart tab, you can approve the requisition from any of the Requisition Maintenance tabs by clicking the

Approve and Return button. Clicking this button does not approve all of the requisitions in the cart. Only the requisition with which you are working is approved.

Viewing Cart Details

You can only view the cart details of a Traditional requisition.

To view the details of and/or edit requisitions in a cart before approving the requisition, click the Cart Details button. The Cart tab is displayed with the Requisition Maintenance navigation bar. For more information about this tab and navigation bar, see Maintain Requisitions.

After viewing and/or editing information on the Cart tab, you can approve the requisition from any of the Requisition Maintenance tabs by clicking the Approve and Return button. Clicking this button does not approve all of the requisitions in the cart. Only the requisition with which you are working is approved.

Rejecting a Requisition

Rejecting a requisition returns it to the requisitioner for modification and can be resubmitted. To completely void a requisition so that it cannot be resubmitted, use the Void button.

Only Traditional requisitions can be rejected.



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On the Requisitions tab, click the requisitions you want to reject, then click the Reject button.

In the Rejection Reason box, select a Rejection Reason and enter a Rejection Note.

- The note you enter is displayed in the report queue, which the requisitioner will access so that he or she can make modifications to rejected requisitions so that they can be resubmitted. Use this field to explain what modifications need to be made so that the requisition can be approved after it is resubmitted.

Click the OK button. The requisitions are removed from the list.

Voiding or Denying Requisitions

Unlike rejecting a requisition, voiding a requisition means that it cannot be modified and resubmitted to the requisitioner. To return the requisition to the requisitioner for modifications, click the Reject button.

Traditional requisitions are voided, and Not-To-Exceed and Blanket/Project requisitions are denied.

On the Requisitions tab, click the requisition you want to void, then click the Void button to view the Void Reason box.

Select a Void Reason, then click the OK button. The requisition is removed from the list.

Holding Requisitions

Only Traditional requisitions can be held.

On the Requisitions tab, click the requisition you want to hold, then click the Hold button to view the Hold Reason box.

Select the Hold Reason, then click the OK button. The requisition can no longer be approved.

Adding Notes to Requisitions



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Click the Notes button on the Requisitions tab to view the standard notes screen. See Notes screen for details.

You can only add notes to Traditional requisitions.