

WEBAPP2: Requisition Approval/Rejection – Project Approver

The purpose of this section is to introduce a Project Approver how to approve or reject a Requisition on Agresso Web. If the Requisition is approved it will proceed to next step of the Approval workflow until it becomes a Purchase Order. If the Requisition is Rejected it will be sent back to originating requisitioner.

- **If under £100 it will go straight to the Purchasing Officer to Approve.**
- **If over £100 it will go to a nominated Project Approver. It will then have to be approved by a Purchasing Officer before converting into a Purchase Order.**
- **The higher the requisition amount the more levels of authority have to approve the requisition.**

Once the Requisition has become a Purchase Order it will be automatically emailed/ faxed/ printed off by the Purchasing Officer and sent to the supplier. The Purchase Order will also record a commitment against the appropriate Cost Centre and Project until all items on the Purchase Order are allocated to the corresponding invoice, or, the Purchase Order is manually closed.

There are two options on how to approve a Requisition:

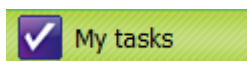
WEBPAPP1.2: SIMPLE MODE - This allows the user to Approve or Reject the whole requisition in one quick process

WEBPAPP1.3: ADVANCED MODE – This allows the user to Approve and Reject individual lines with further details shown on screen

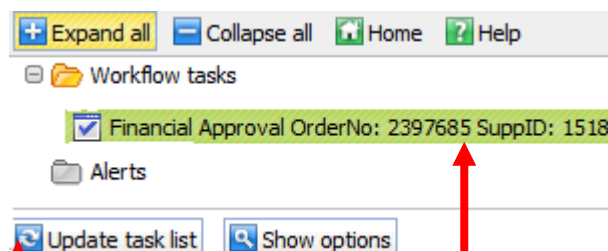
WEBAPP2.2: SIMPLE MODE Requisition Approval/Rejection

This allows the user to Approve or Reject the whole requisition in one quick process

1. To access the Approval or Reject screen:
2. From the Menu Select



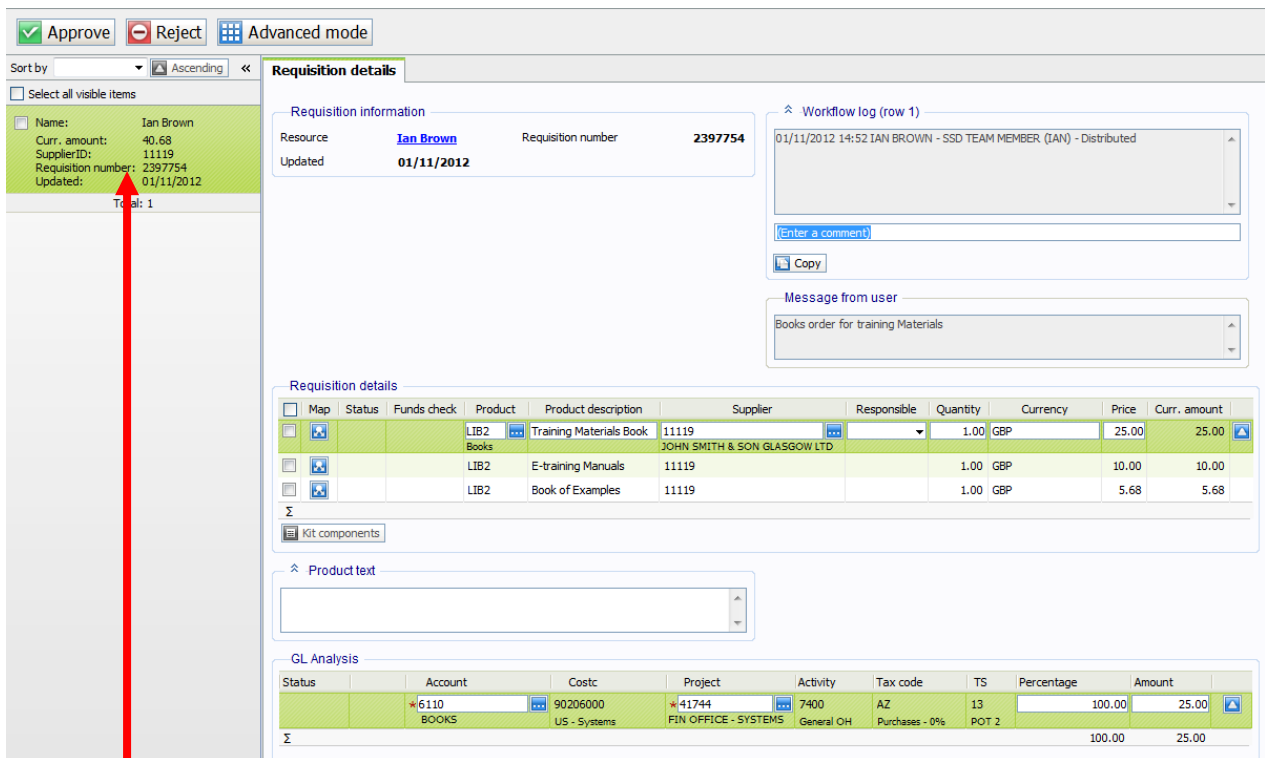
This will show any tasks that are pending:



The update Task list will update your tasks

3. Select the required requisition to approve from the tasks

The following screen will appear:



Approve Reject Advanced mode

Sort by Ascending

Select all visible items

Name: Ian Brown
Curr. amount: 40.68
SupplierID: 11119
Requisition number: 2397754
Updated: 01/11/2012
Total: 1

Requisition details

Requisition information

Resource: [Ian Brown](#) Requisition number: **2397754**
Updated: **01/11/2012**

Workflow log (row 1)

01/11/2012 14:52 IAN BROWN - SSD TEAM MEMBER (IAN) - Distributed

[Enter a comment]

Copy

Message from user

Books order for training Materials

Requisition details

Map	Status	Funds check	Product	Product description	Supplier	Responsible	Quantity	Currency	Price	Curr. amount
			LIB2	Training Materials Book	11119		1.00	GBP	25.00	25.00
			Books		JOHN SMITH & SON GLASGOW LTD					
			LIB2	E-training Manuals	11119		1.00	GBP	10.00	10.00
			LIB2	Book of Examples	11119		1.00	GBP	5.68	5.68
Σ										

Kit components

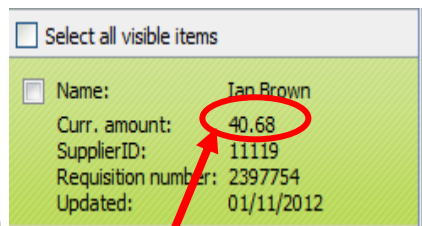
Product text

GL Analysis

Status	Account	Costc	Project	Activity	Tax code	TS	Percentage	Amount	
	*6110	90206000	*41744	7400	AZ	13	100.00	25.00	
	BOOKS	US - Systems	FIN OFFICE - SYSTEMS	General OH	Purchases - 0%	POT 2			
Σ								100.00	25.00

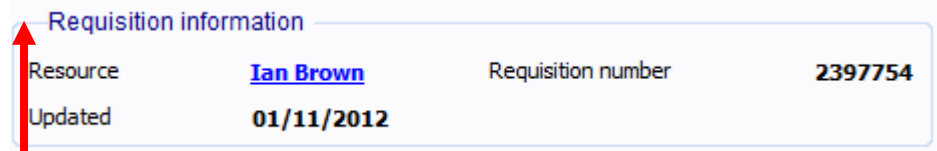
4. Summary

A quick summary of the order will be shown
This will show you the total of the requisition before VAT



Select all visible items

Name: Ian Brown
Curr. amount: **40.68**
SupplierID: 11119
Requisition number: 2397754
Updated: 01/11/2012



Requisition information

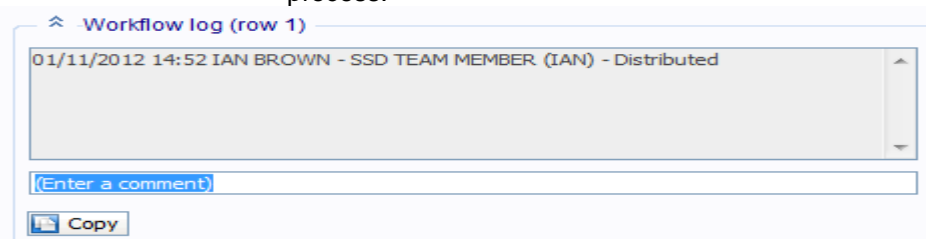
Resource: [Ian Brown](#) Requisition number: **2397754**
Updated: **01/11/2012**

5. Requisition information will show:

- a. Resource The person who raised the Requisition
- b. Requisition number Requisition number
- c. Updated The last update

6. Workflow Log (per row)

Workflow log The Workflow Comment will show any comments made during the workflow process.



Workflow log (row 1)

01/11/2012 14:52 IAN BROWN - SSD TEAM MEMBER (IAN) - Distributed

[Enter a comment]

Copy

7. Message The purpose of the requisition. This is entered by the Requisitioner

Message from user

Books order for training Materials

8. Requisition Details If required click on each row to see the Requisition Details per row

Each row will show the following information and, if required, can be amended by the Purchasing Officer

- a. Product Code University Specific Code for Purchasing
- b. Product Description Description entered by the Requisitioner
- c. Supplier The supplier
- d. Quantity The Quantity required
- e. Currency The Currency (this will depend on the Supplier selected)
- f. Price The Price of the goods before VAT
- g. Curr. Amount The Quantity multiplied by the Price

Requisition details

Map	Status	Funds check	Product	Product description	Supplier	Quantity	Currency	Price	Curr. amount
			LIB2 Books	Training Materials Book	11119 JOHN SMITH & SON GLASGOW LTD	1.00	GBP	25.00	25.00
			LIB2	E-training Manuals	11119	1.00	GBP	10.00	10.00
			LIB2	Book of Examples	11119	1.00	GBP	5.68	5.68

9. Product Text For each row you will also see any additional information entered by the Requisitioner for the product required. This can also be amended

Product text

10. GL Analysis This shows the details of the project that has been selected to pay for the purchases. Some of these fields can be amended

- a. Account The Account for Reporting Purposes. **Do not amend**
- b. Cost Centre The cost centre for the project
- c. Project The Project Code
- d. Tax Code The Tax code for the purchase
- e. Percentage The Percentage of cost that is assigned to the Project
- f. Amount The Amount of cost that is assigned to the Project

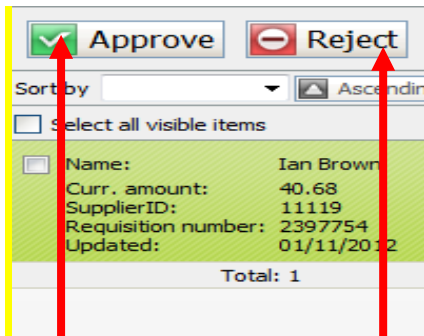
GL Analysis


Status	Account	Costc	Project	Activity	Tax code	TS	Percentage	Amount
	*6110 BOOKS	90206000 US - Systems	*41744 FIN OFFICE - SYSTEMS	7400 General OH	AZ Purchases - 0%	13 POT 2	100.00	25.00
Σ							100.00	25.00


11. Split Costs If the costs are to split between different projects the percentage/amount split will also be shown.

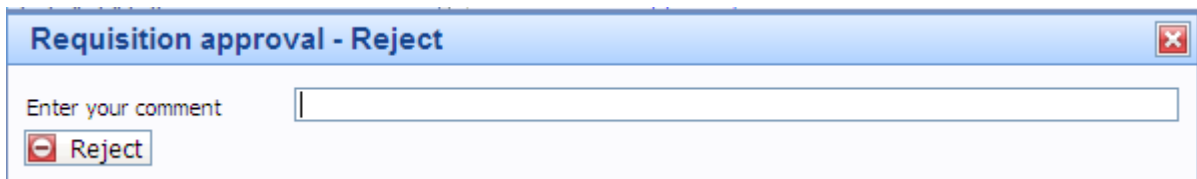
12. APPROVING OR REJECTING THE WHOLE REQUISITION

Please note that once a requisition is approved or rejected it cannot be undone by the Approver.



13. Select  button to Approve the requisition. Once approved by a Purchasing Officer the requisition will convert into a Purchase Order.

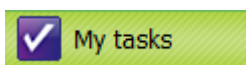
14. To Reject the requisition Select  button and enter a comment why the requisition is to be rejected. The requisition will then go back to the person who approved the requisition.



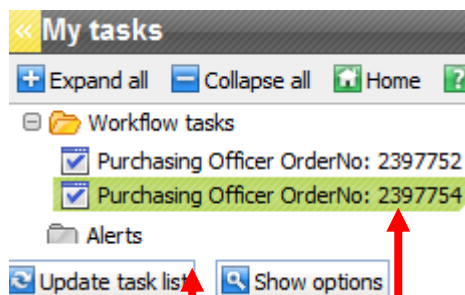
WEBAPP2.3: ADVANCED MODE Requisition Approval/Rejection

This allows the user to Approve and Reject individual lines with further details shown on screen

1. To access the Approval or Reject screen:
2. From the Menu Select



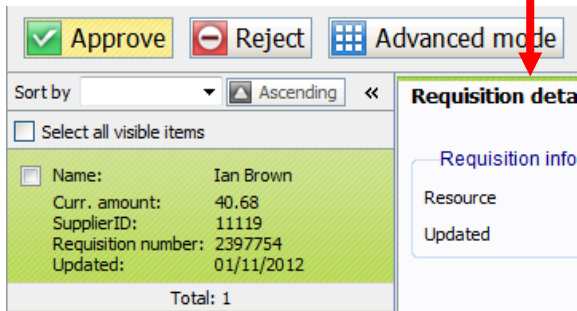
This will show any tasks that are pending:



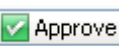

The update Task list will update your tasks

3. Select the required requisition to approve from the tasks




4. To use the Advanced Mode options select  **Advanced mode**









5. The Requisition details shown on screen will be the same as the Simple Mode Approval Screen mentioned in **Section WEBAPP1.3**

6. Approving a Requisition Row - Select  to approve each row, or Tick on the Rows required to Approve and select 

Requisition details




<input type="checkbox"/>	Map	Status	Funds check	Product	Product description	Supplier	Quantity	Currency	Price	Curr. amount
<input checked="" type="checkbox"/>		Approve		LIB2 Books	Training Materials Book	11119 JOHN SMITH & SON GLASGOW LTD	1.00	GBP	25.00	25.00
<input type="checkbox"/>				LIB2	E-training Manuals	11119	1.00	GBP	10.00	10.00
<input type="checkbox"/>				LIB2	Book of Examples	11119	1.00	GBP	5.68	5.68

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
     


7. Approving all rows - Tick on the below box to select all rows then select 

Requisition details




<input checked="" type="checkbox"/>	Map	Status	Funds check	Product	Product description	Supplier	Quantity	Currency	Price	Curr. amount
<input checked="" type="checkbox"/>		Approve		LIB2 Books	Training Materials Book	11119 JOHN SMITH & SON GLASGOW LTD	1.00	GBP	25.00	25.00
<input checked="" type="checkbox"/>		Approve		LIB2	E-training Manuals	11119	1.00	GBP	10.00	10.00
<input checked="" type="checkbox"/>		Approve		LIB2	Book of Examples	11119	1.00	GBP	5.68	5.68

Σ







     

8. Rejecting a Requisition Row - Select  to reject each row. Or Tick on the Rows required to Reject and select 

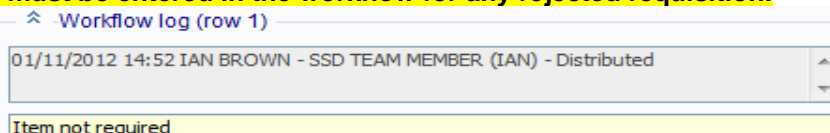
Requisition details


<input checked="" type="checkbox"/>	Map	Status	Funds check	Product	Product description	Supplier	Quantity	Currency	Price	Curr. amount
<input checked="" type="checkbox"/>		Reject		LIB2 Books	Training Materials Book	11119 JOHN SMITH & SON GLASGOW LTD	1.00	GBP	25.00	25.00
<input type="checkbox"/>				LIB2	E-training Manuals	11119	1.00	GBP	10.00	10.00
<input type="checkbox"/>				LIB2	Book of Examples	11119	1.00	GBP	5.68	5.68

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A comment must be entered in the workflow for any rejected requisition.



9. UNDO – This option will allow the user to undo the Approval or Reject status of the row. Click on the  Undo button to revert the line to original status. NB This must be done before requisition is saved


10. **Saving the Requisition Approval/Rejection** Once all the details for the Requisition have been Approved/Rejected the user can then Save the Requisition.

Select the  Save button at the bottom of the screen (you may need to scroll down to see this).

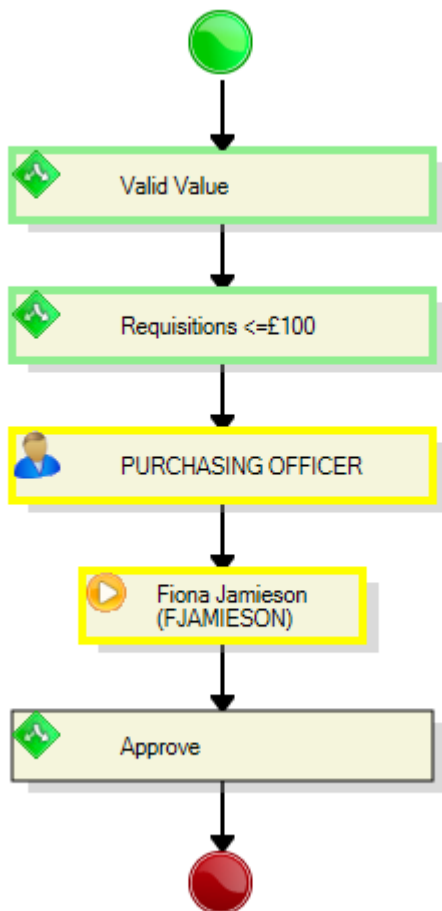
Once saved the Requisition will then follow a workflow to the approval process until it then becomes a Purchase Order, or, the if Requisition is rejected it will be sent back to the originating requisitioner.


WEBAPP2.3: Workflow Map

The Workflow Map can be used to see what stage of the process each Requisition row is currently at.

Select  workflow map icon on the required row.

The following screen will appear:



 The highlighted areas in yellow show the parts of the workflow that need to be processed.

 If the process has a green tick – the person has completed their process

 If there is a Full Stop – The requisition has been Rejected

Place your cursor over the Workflow stage to see more information regarding each stage.

Step information
 Step status Finished
 Step started 30.03.2007 17:45:49
 Step finished 30.03.2007 18:40:06
 Distr. user Requisitioner 2

Logged values

ORDERNO
10298
 ORDERED
100
 UNIT PRICE
1.34
 SUPPID
12052
 ORDERNO
10298

Workflow comment

Please check product Code

If the Workflow Map says 'ITEMS TO FOLLOW UP' please contact the [Agresso support desk](#):