

Purchasing – Approving a Requisition

For employees approving a requisition.

Purpose:	Approve a requisition.
How to Access:	Log into the Stratus application. Select the Procurement task in the Navigator.
Helpful Hints:	Be sure to keep in mind that... <ul style="list-style-type: none">Supporting documents and other necessary information can be attached.
Procedure:	Complete the following steps to approve a requisition:

1. If you have a requisition to approve, you will receive a bell notification.



Good morning, Card Holder!

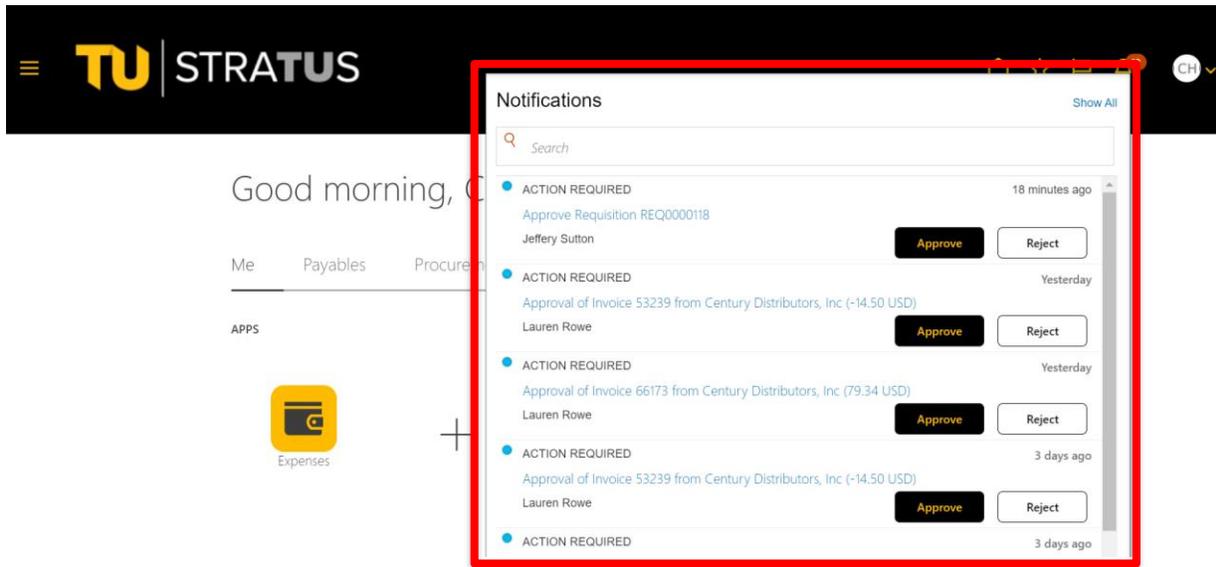
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APPS

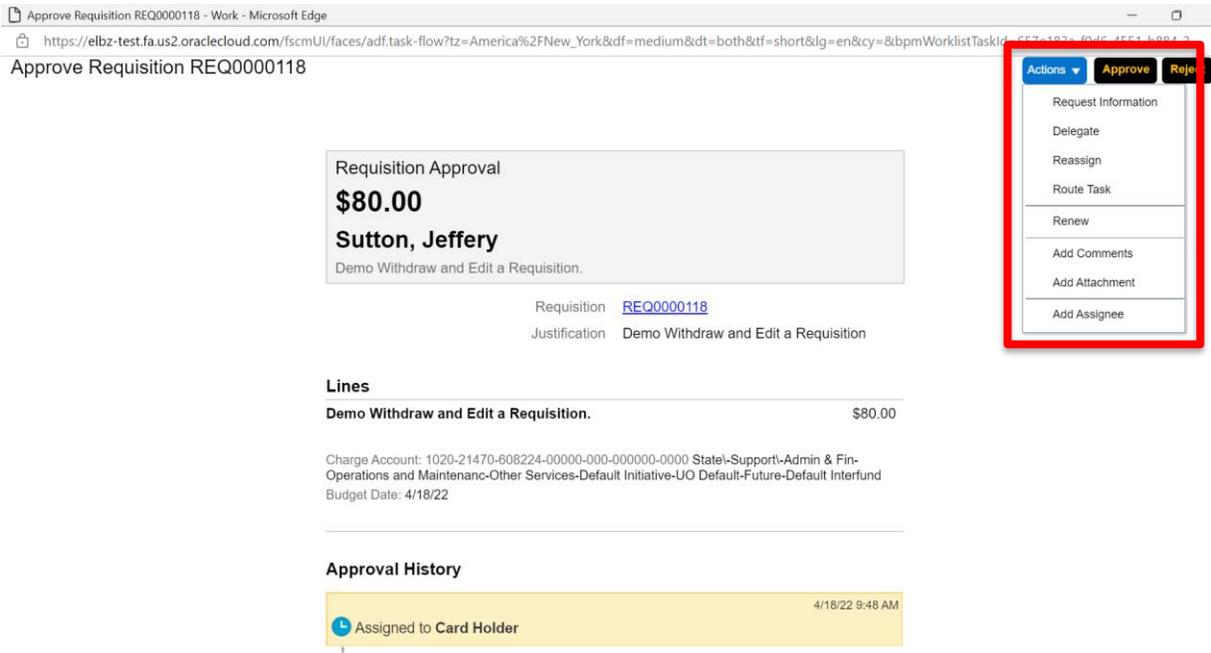


NOTE: If you have an expense report to approve, you will also receive an email. Refer to the appendix at the end of this document for further instructions on approving a requisition via email.

2. Within the Bell notification in Stratus, click on the name of the appropriate requisition you wish to approve.



- This will bring up the requisition details. From here you can view the requisition image, approve, reject, or click on actions in the top right corner. Stratus checks the budget before the requisition is submitted for approval. Approvers should also confirm that the purchase is appropriate for their department, the price is fair and reasonable, the accounts are correct, and the transaction is in the correct fiscal year.



NOTE: Options from the Actions drop down:

Request Information – will send a note to the traveler for additional information.

Delegate – delegate approval to someone else to approve the requisition on your behalf.

Reassign – reassign approval to someone else to approve the requisition on your behalf.

Route Task – will require you to approve the requisition, then can be routed to an additional person to review/approve.

Renew – restart the workflow if it has expired.

Add Comments – adds comments to the requisition.

Add Attachments – adds attachments to the expense report.

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Add Assignee – add someone else to review the requisition approval.

4. When you have reviewed the requisitions and are ready to approve, click Approve.

The screenshot shows a web browser window titled "Approve Requisition REQ0000118 - Work - Microsoft Edge". The URL is https://elbz-test.fa.us2.oraclecloud.com/fscmUI/faces/adf.task-flow?tz=America%2FNew_York&df=medium&dt=both&tf=short&lg=en&cy=&bpmWorklistTaskId=657e183a.... The page title is "Approve Requisition REQ0000118".

The main content area displays "Requisition Approval" with a value of "\$80.00" and the name "Sutton, Jeffery". Below this, it says "Demo Withdraw and Edit a Requisition." and provides details for "Requisition REQ0000118" and "Justification Demo Withdraw and Edit a Requisition".

The "Lines" section shows "Demo Withdraw and Edit a Requisition." with a value of "\$80.00". Below this, it lists "Charge Account: 1020-21470-608224-00000-000-000000-0000 State-Support-Admin & Fin-Operations and Maintenanc-Other Services-Default Initiative-UO Default-Future-Default Interfund" and "Budget Date: 4/18/22".

The "Approval History" section shows a single entry: "Assigned to Card Holder" dated "4/18/22 9:48 AM".

An "Actions" dropdown menu is open, showing options: "Approve" (highlighted with a red box), "Reject", "Requisition", "Delegate", "Reassign", "Route Task", "Renew", "Add Comments", "Add Attachment", and "Add Assignee".

5. A new popup window will appear in which you can add any additional comments and/or attachments. When you are finished adding comments/attachments, click Submit. **NOTE:** This will look the same if you Reject the requisition instead of approving.

The screenshot shows the same web browser window as above, but with a "Submit" button highlighted in a red box. The "Approve" button is also highlighted in a red box. The "Submit" button is located in the top right corner of the page, next to the "Approve" and "Reject" buttons.

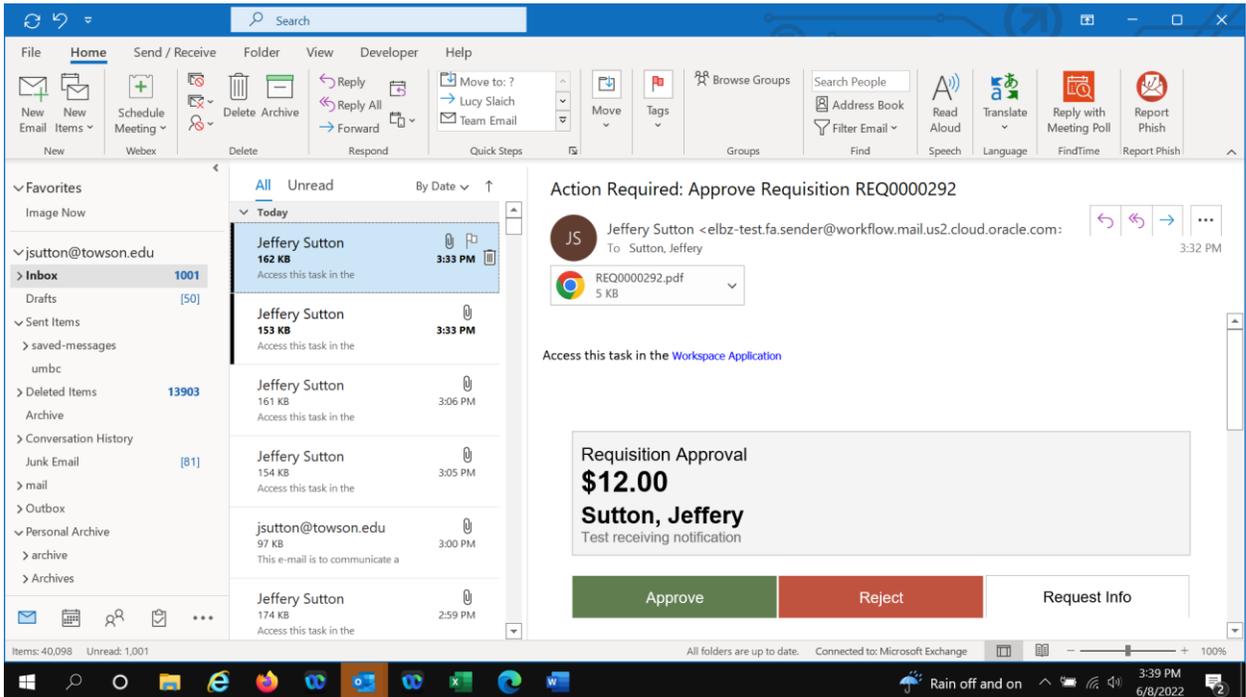
The "Approval History" section shows a single entry: "Assigned to Card Holder" dated "4/18/22 9:48 AM".

A "Requisition Approval" popup window is open, showing "Approve" and "Cancel" buttons. The "Submit" button is highlighted in a red box. Below the "Approve" button, there is a "Comment" field and an "Add Attachment" field. The "Add Attachment" field is highlighted in a red box and contains a green upload icon and the text "Drag files here or click to add attachment".

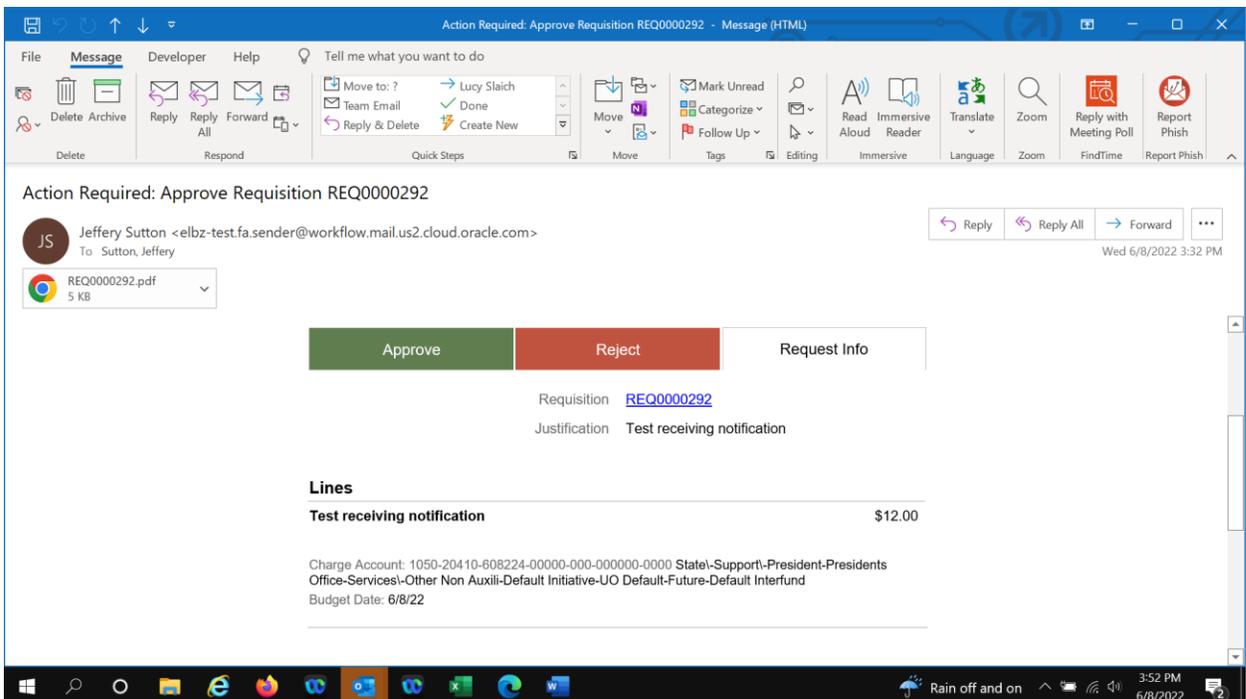
Appendix – Approving a Requisition via Email

For employees approving a requisition via email notification.

1. When a requisition is submitted for approval, it is routed to the Cost Center Manager’s Notification Bell, and they are sent an email. To approve a requisition via email, navigate to Outlook and open the approval email. At the top of the email, you can see the amount, the requester, and a description of the purchase. You will also see three tabs that allow the user to Approve, Reject, or Request Information about the transaction.



2. Scrolling down, you can see more information, including the justification, distribution, in words and numbers, and the budget date. After reviewing the information, if you are ready to submit, click Approve.



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- The system will return the screen below. Click Send and the task will be complete.

