Requisition Approval

Approving a Requisition

Approving/Denying a Single Requisition

1. Click the 'Activities' icon in the Activity Stream.
2. Click the 'Approvals' button to filter down the activities to only Approval related items.
3. Click on the hyperlink of the Requisition Number and Description to navigate directly to the Requisition (Optional)
4. Click the 'Take Action' button on the Requisition record you want to approve.
5. Click 'Approve' or 'Deny' accordingly.
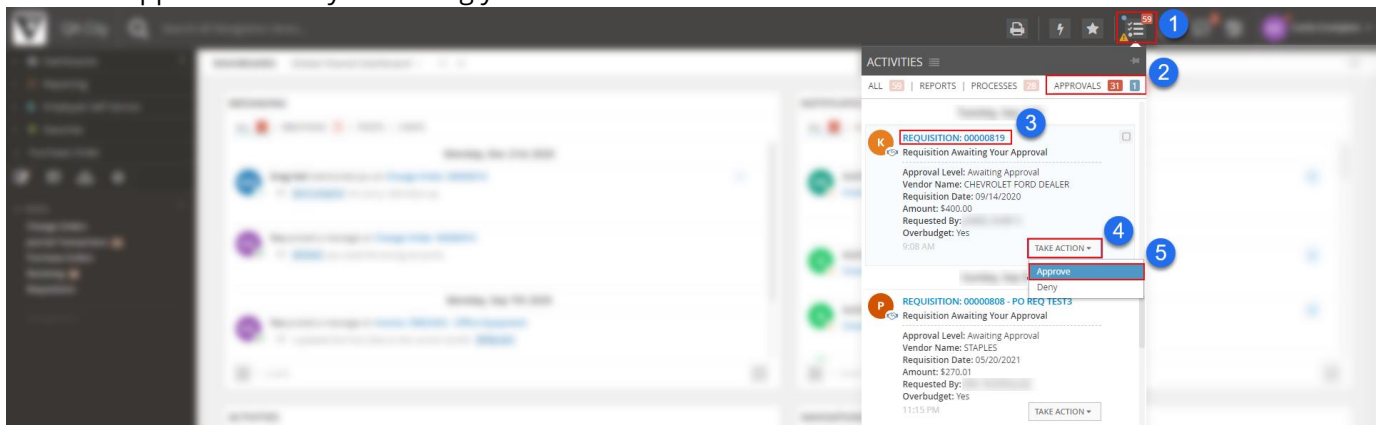
6. Enter a value into the 'Brief Notes' field (optional).
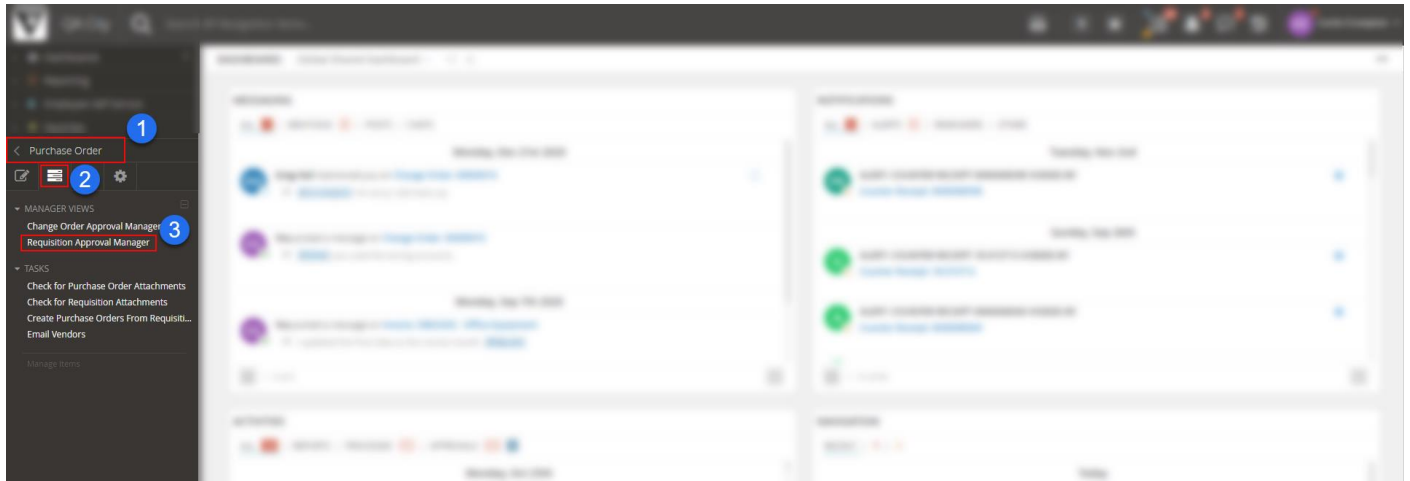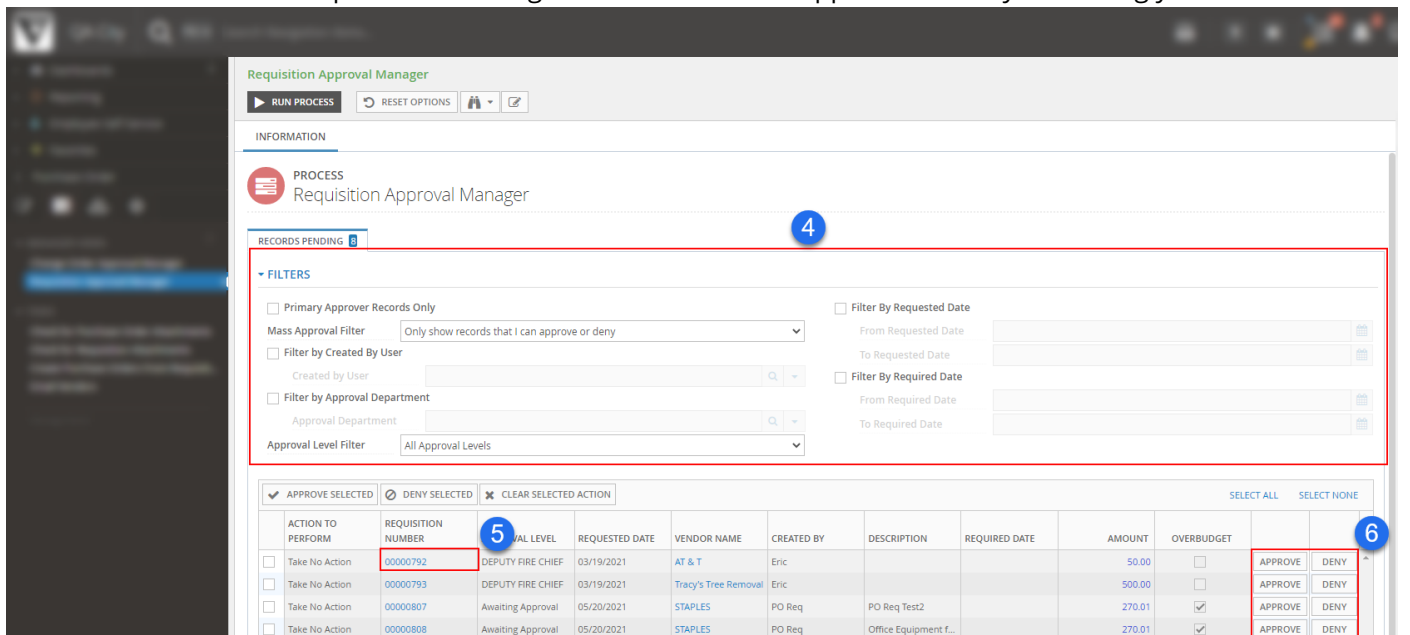7. Enter a value into the 'Notes' field (optional).
8. Click 'OK'.

9. Repeat steps 4-8 for each Requisition record awaiting your approval.

Approving Multiple Requisitions

1. Click on the 'Purchase Order' Module in the Navigation Pane.
2. Click on the 'Tasks' Menu Item.

3. Click on 'Requisition Approval Manager'.
4. Set any of the filters to narrow down the specific approvals you are trying to approve (Optional).
5. Click on the hyperlink of the 'Requisition Number' and click 'View in Window' to view the Record View of the Requisition (Optional).
6. Click on one of the Requisitions in the grid control and click 'Approve' or 'Deny' accordingly.
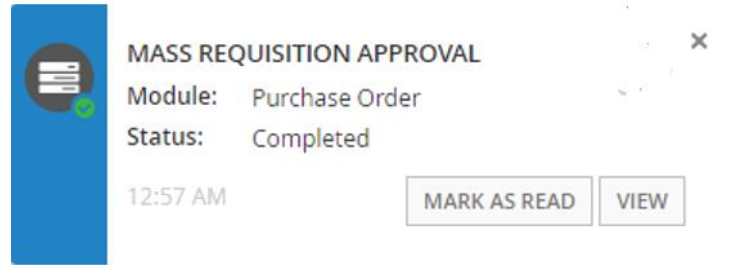
7. You can also click on the 'SELECT ALL' button and then click 'Approve Selected' to approve all of the requisitions at one time.
8. Enter a value into the 'Brief Notes' field (optional).
9. Enter a value into the 'Notes' field (optional).
10. Click 'OK'.
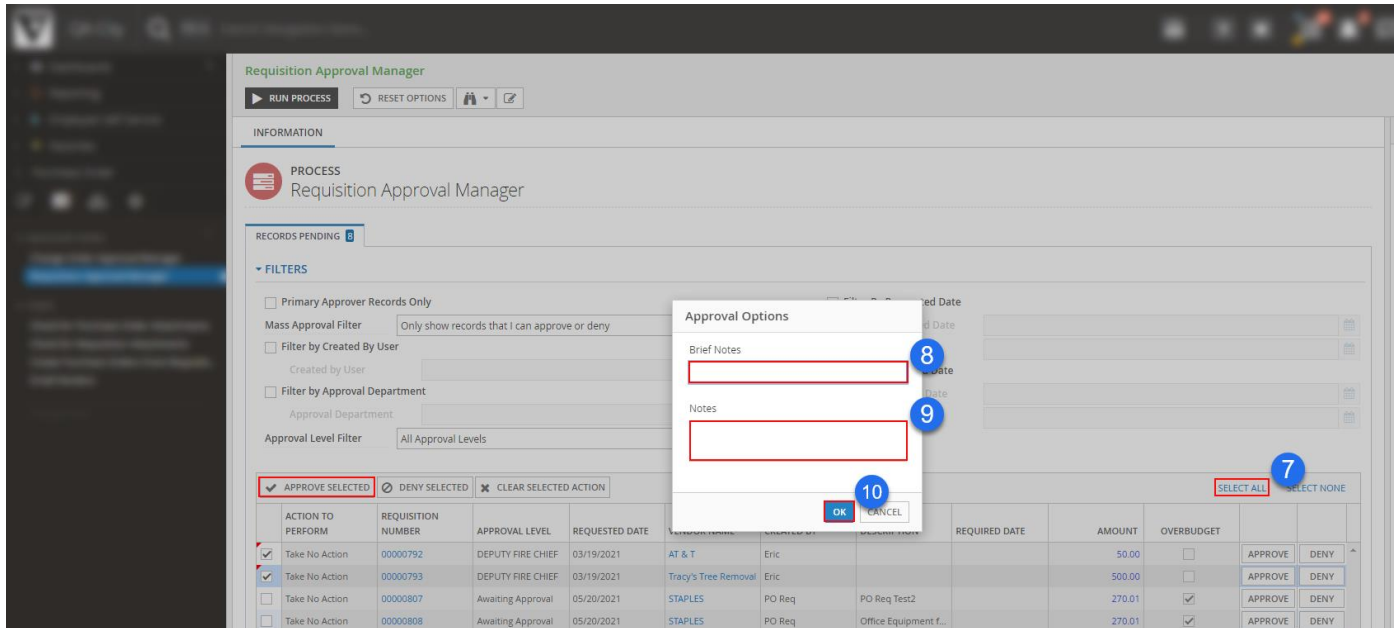
11. Verify the Action to Perform updated to 'Approve' and then click 'Run Process'.
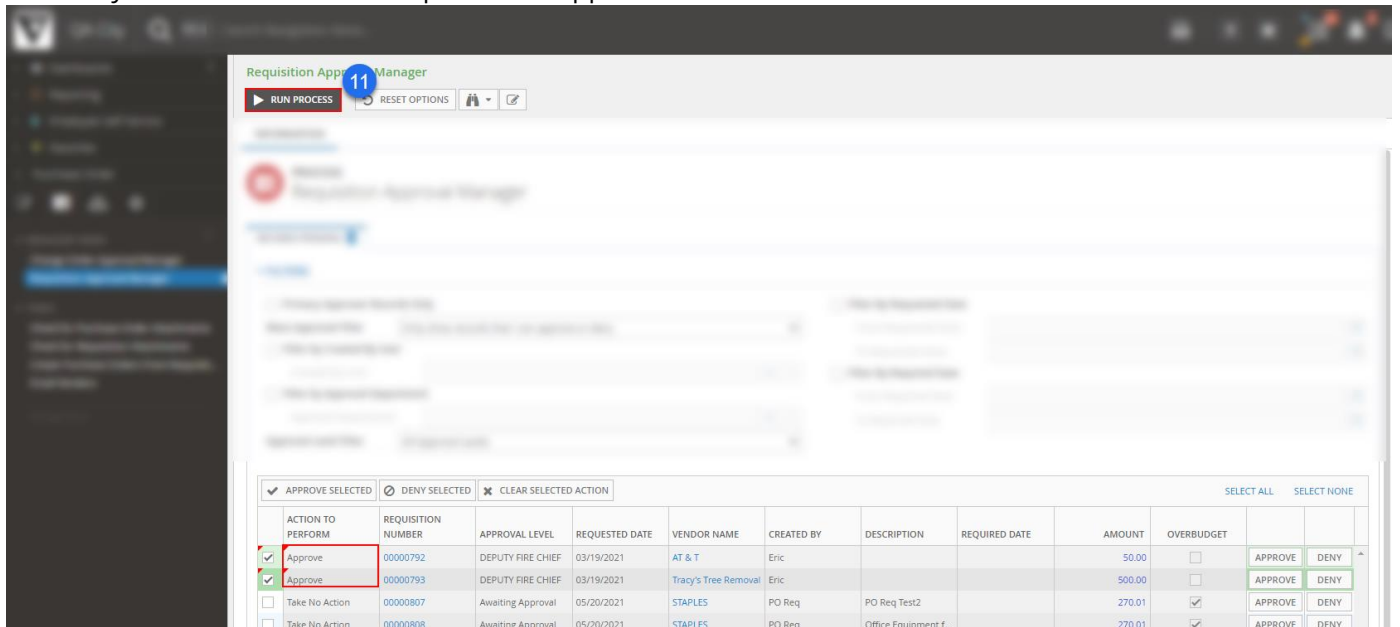
12. The process will then enter the queue. Once it is finished you will receive a notification that the process completed.