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Approving Requisition Amounts


Concept

Based on your business processes and system setup, you may be required to approve, deny or recycle a completed requisition before the process can continue. If the business unit is configured such that the requisition amount must be approved, the requisition status is set to Pending Approval. The requisition amount can then be approved, denied, or recycled on the Requisition Amount Approval page by an authorized operator.

In this topic, you have a Requisition ID for amount approval. Your goal is to change the status to Approved based on the total requisition amount.

Navigation



Step	Action
1.	Click the Worklist link located in the navigation bar at the top of your screen. 

Procedure



Step	Action
2.	On the Worklist page, click on the link for Req Approval Worklist item.

Process Document

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Requisition Amount Approval

Unit: UMS05 Req: 5000034379 Requester: Requester Name

*Approval Action: Approval Status: In Process

Comment

Amount Details

Requisition Date: 08/12/2008

Total Amount: 51,000.000 Dollar

Total Base Amount: 51,000.000 Dollar

Line Details

Line	Sched	Status	Amount	Currency	Base Amt	Base Currency	Req Qty	UOM	Revision
1	1	Active	51,000.00	USD	51000.00	USD	1.0000	EA	

Distributions/ChartFields

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	51000.000	UMS05	5745100	61000		00			

Save View Worklist Previous in Worklist Next in Worklist Notify

Step	Action
3.	<p>Use the Requisition Amount Approval page to <i>approve, deny, or recycle</i> a requisition. You can also view details of the requisition on this page. Notice that in this example, the <i>Approval Status</i> is In Process.</p> <p>The amounts that appear in the Amount Details section are the amounts you are being asked to approve. (Changes to the requisition can be made on the Maintain Requisitions - Requisition page and Maintain Requisitions - Schedule page.)</p> <p>Use the Line Details section to view the specific line information for the requisition.</p> <p>Click the Details tab to view additional details about the amount.</p> <p>Details</p>



Process Document

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MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

Requisition Amount Approval

Unit: UMS05 Req: 5000034379 Requester: Requester Name

*Approval Action: Approval Status: In Process

Comment

Amount Details

Requisition Date: 08/12/2008

Total Amount: 51,000.000 Dollar

Total Base Amount: 51,000.000 Dollar

Line Details Customize | Find | First 1 of 1 Last

Line	Sched	Status	Item	Description	Price Tot	Price Tot Under	% Prc Tot	% Prc Tot Under	Buyer	RFQ Required
1	1	Active		UPK > \$50,000	99,999,999.99999	99999999.99999	0.00		0033660	N

Distributions/ChartFields Customize | Find | View All | First 1 of 1 Last

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	51000.000	UMS05	5745100	61000		00			

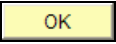
Step	Action
4.	<p>The items associated with the requisition are displayed.</p> <p>The Distributions/Chartfields section displays the chartfield combination to which the line will be charged.</p> <p>Click the item's <i>Description</i> link to view the complete description for a specific item.</p>

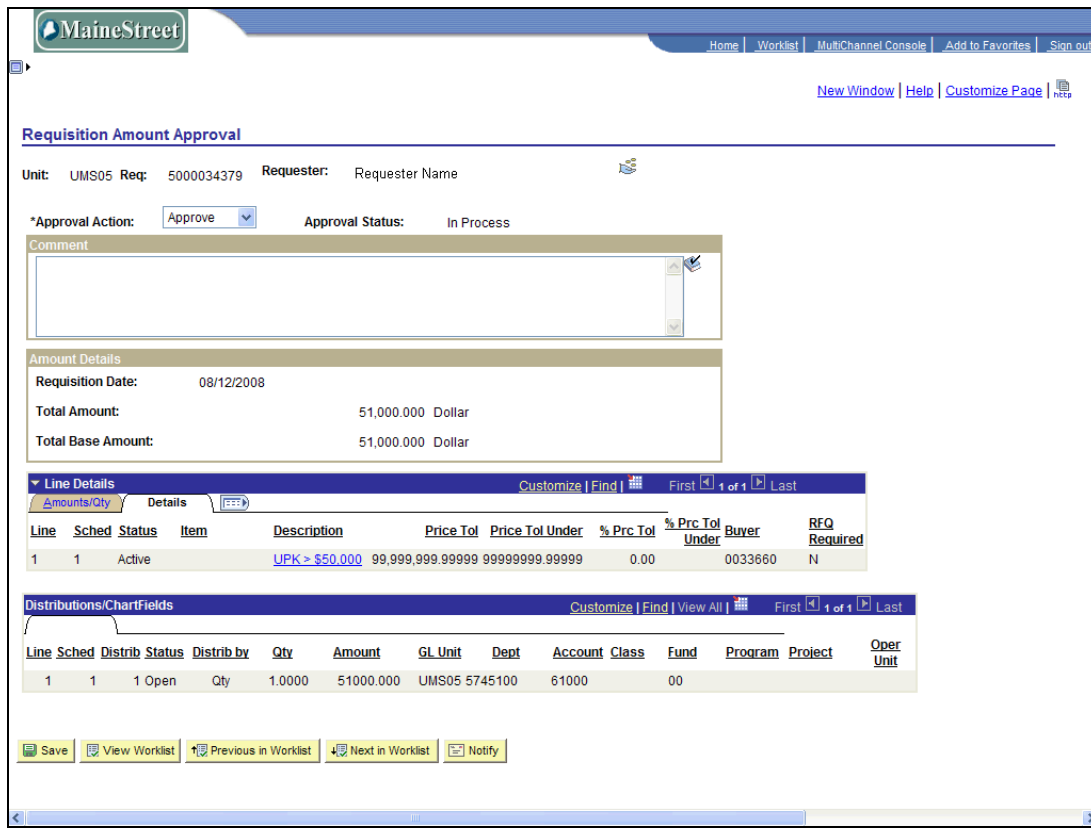
Process Document

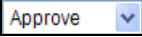

Financials 9.0: Approving Requisition Amounts



The screenshot shows a web application window titled 'MaineStreet'. The top navigation bar includes links for 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below the navigation bar, there are links for 'New Window', 'Help', 'Customize Page', and a printer icon. The main content area is titled 'Item Description' and contains a text input field with the text 'UPK > \$50,000'. Below the input field are two buttons: 'OK' and 'Cancel'.

Step	Action
5.	Click the OK button. 



Step	Action
6.	<p>In this example, we will approve the requisition. (The same process is used to <i>Recycle</i> and <i>Deny</i> the requisition)</p> <p>To Approve the requisition, simply check that the <i>Approval Action</i> is set to Approve and click the <i>Save</i> button.</p> <p>Click on the <i>Approval Action</i> drop-down arrow.</p> 
7.	<p>Click on Approve to select it.</p> 

Process Document

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MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Requisition Amount Approval

Unit: UMS05 Req: 5000034379 Requester: Requester Name

*Approval Action: Approval Status: In Process

Comment

Amount Details

Requisition Date: 08/12/2008

Total Amount: 51,000.000 Dollar

Total Base Amount: 51,000.000 Dollar

Line Details Customize | Find | First | 1 of 1 | Last

Line	Sched	Status	Item	Description	Price Tol	Price Tol Under	% Prc Tol	% Prc Tol Under	Buyer	RFQ Required
1	1	Active		UPK > \$50,000	99,999,999.99999	99999999.99999	0.00		0033660	N

Distributions/ChartFields Customize | Find | View All | First | 1 of 1 | Last

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	51000.000	UMS05	5745100	61000		00			

Step	Action
8.	<p>If you wish, you can enter a comment about this approval in the Comment section. If you Deny or Recycle a Req Amount, you should enter a comment about why you are denying or recycling the amount.</p> <p>When ready, click the Save button.</p> <p></p>



Process Document

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The screenshot shows a web application interface for 'MaineStreet'. At the top, there is a navigation bar with links for 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below this, there are links for 'New Window', 'Help', and 'Customize Page'. The main content area is titled 'PO Dispatch Routing' and contains the following information:

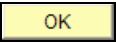
Business Unit UMS05
Requisition ID 5000034379

When the dispatch method on the PO is set to print, the employee named below will receive a pdf file containing the actual PO for printing and sending to the vendor. You can change the employee to whom the pdf file is sent by selecting another name using the prompt. Click OK when done.

Note: If the PO Type is Prepaid, the pdf file is sent to the user for your campus who is responsible for getting the check cut that needs to go with the order. This name cannot be changed.

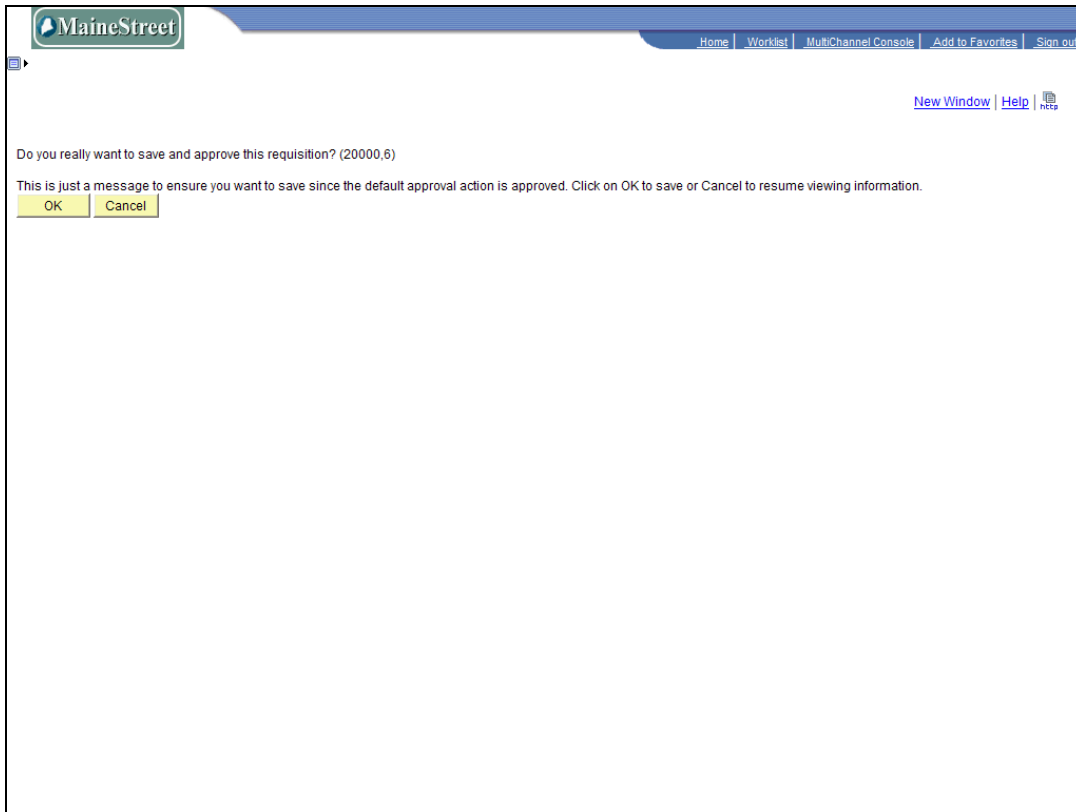
User ID

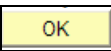
At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

Step	Action
9.	Click the OK button. 

Process Document

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Step	Action
10.	Click the OK button to confirm you wish to approve the requisition. 



Process Document

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Home | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)

[New Window](#) | [Help](#) | [Customize Page](#) |

Requisition Amount Approval

Unit: UMS05 Req: 5000034379 Requester: Requester Name

*Approval Action: Approval Status: Complete

Comment

Amount Details
 Requisition Date: 08/12/2008
 Total Amount: 51,000.000 Dollar
 Total Base Amount: 51,000.000 Dollar

Line Details Customize | Find | First 1 of 1 Last

Line	Sched	Status	Amount	Currency	Base Amt	Base Currency	Req Qty	UOM	Revision
1	1	Active	51,000.00	USD	51000.00	USD	1.0000	EA	

Distributions/ChartFields Customize | Find | View All | First 1 of 1 Last

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	51000.000	UMS05	5745100	61000		00			

Step	Action
11.	Notice <i>Approval Status</i> now displays as Complete .
12.	End of Procedure.