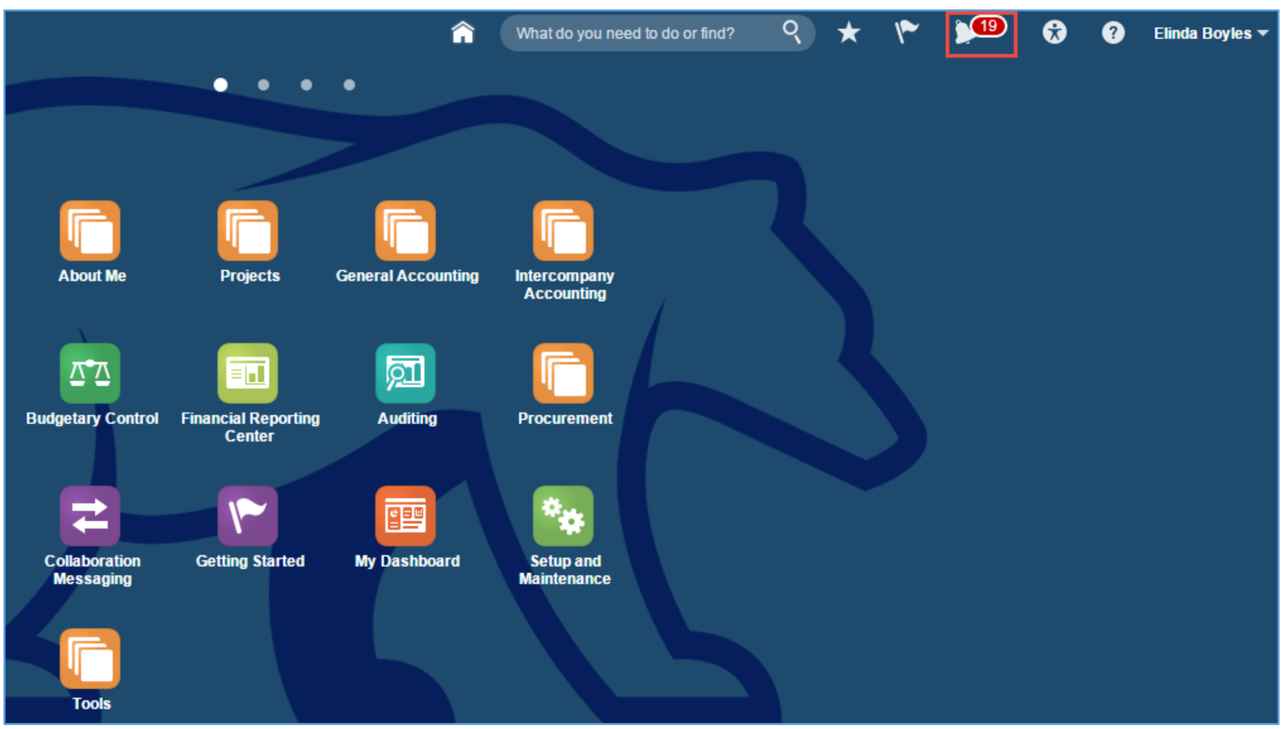
Module Name: Review and Approve Requisitions

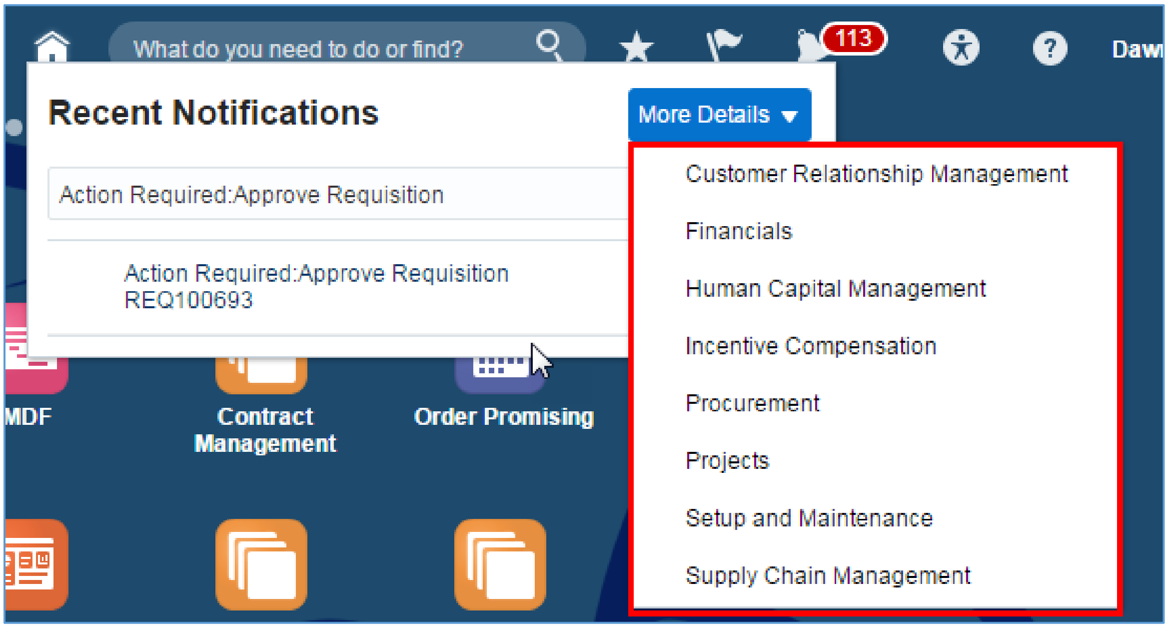
For employees approving requisitions

Purpose:	Review and approve Requisitions.
How to Access:	Log into the Bear Trax application and enter **Purchase Requisition** in the Search field then select the **Purchase Requisitions** task in the Navigator.
Helpful Hints:	Be sure to keep in mind that… • These are steps to review and approve requisitions as a manager • Managers will receive email notifications that they have approvals in Bear Trax • Make sure to check pop up blocker if the requisition window does not open • Approvers cannot make changes to the requisitions • Approvers can make comments or request more information when rejecting
Procedure:	Complete the following steps to review and approve a requisition:

1. Select the Alert Bell at the top of the home page to view notifications.

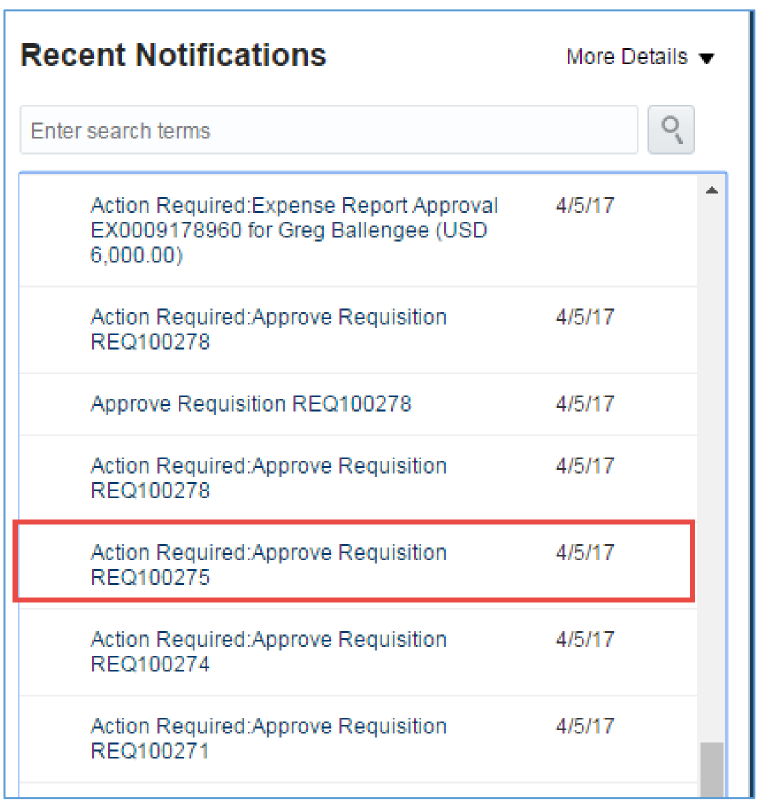


2. OPTIONAL - Click on **More Details** to search by a specific category.

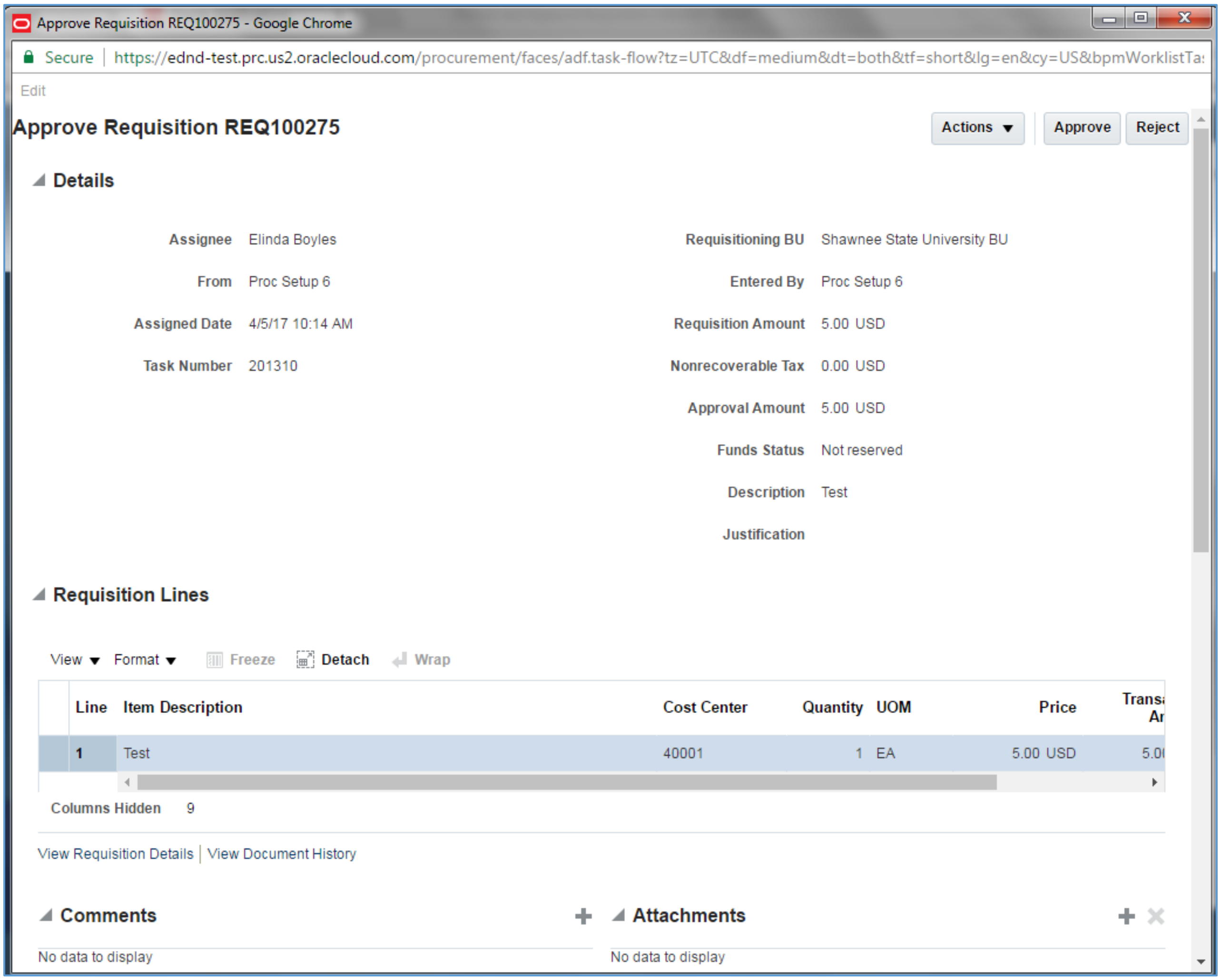


3. Select the requisition to be approved.

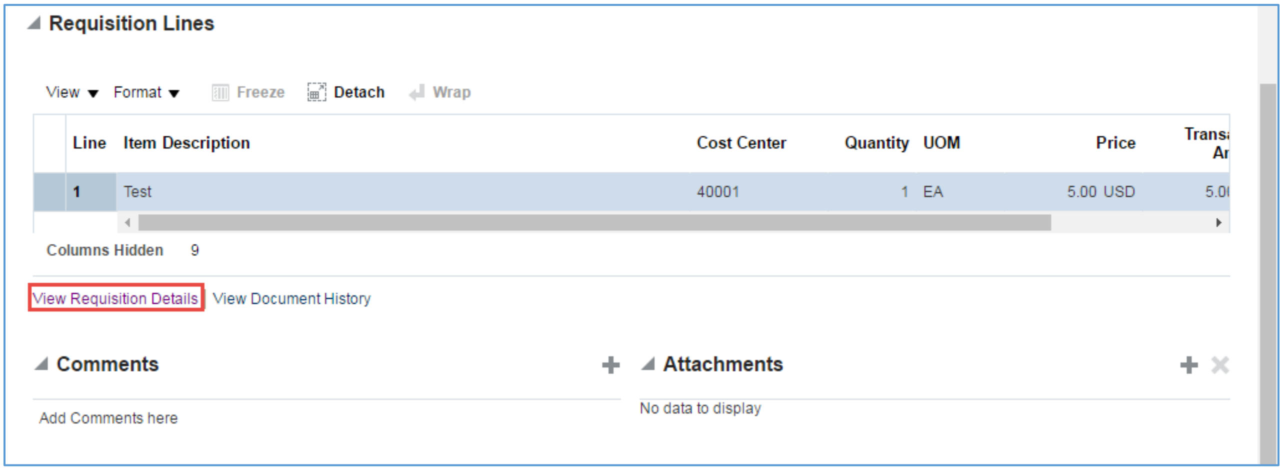
Note: Make sure to check pop up blocker if the requisition window does not open.



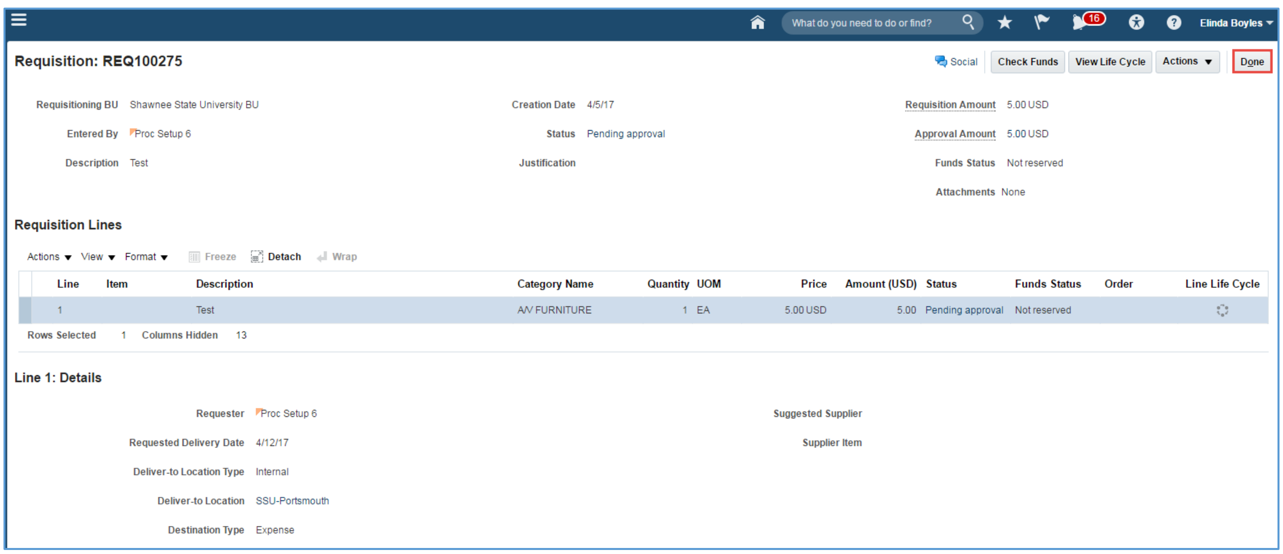
The requisition window will open and show details and actions for the requisition.



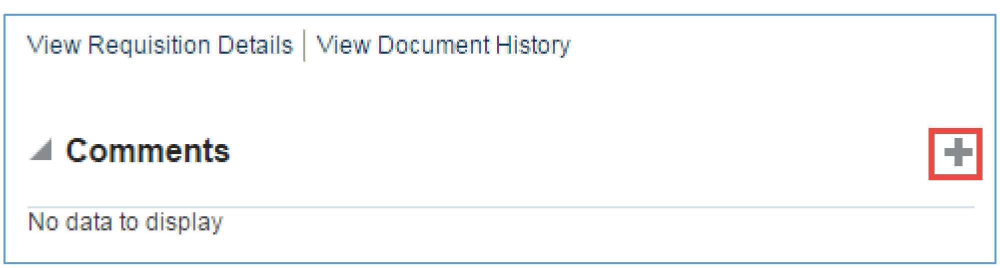
4. Click on **View Requisition Details** link to review the details of the requisition. A new window opens.



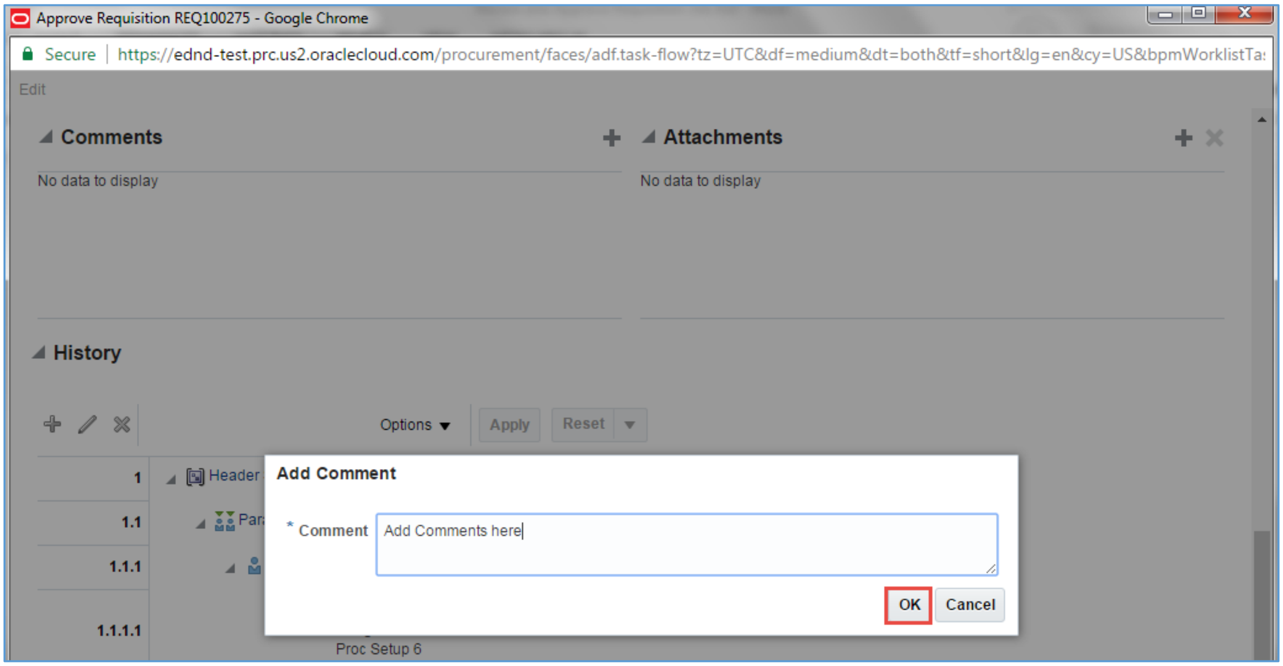
5. Review the details and click **Done** to return to previous page.



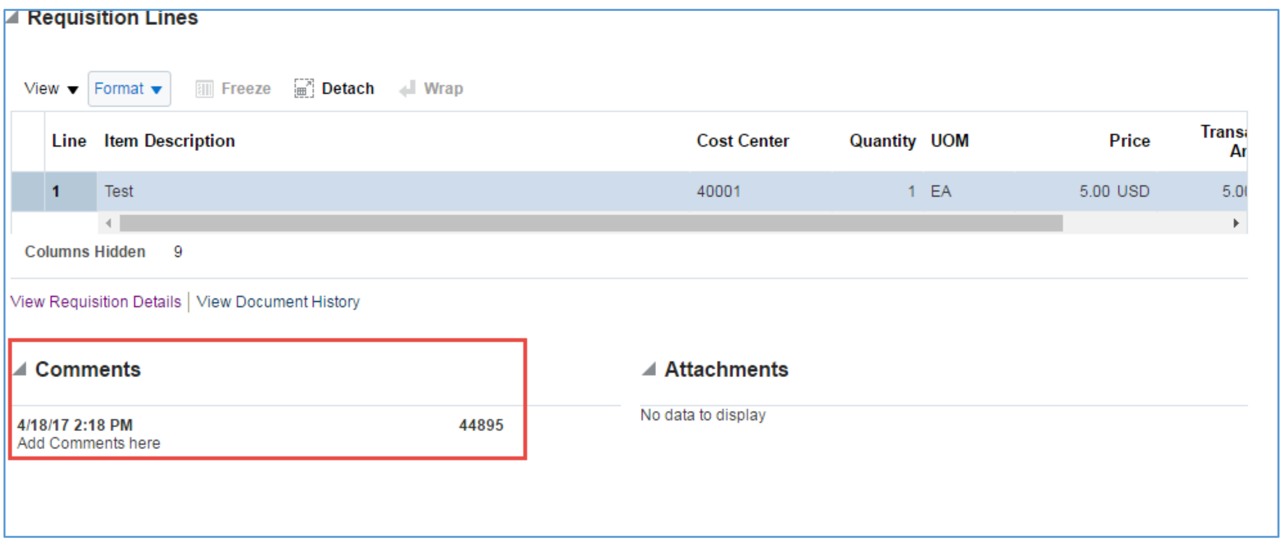
6. To add comments to the requisition, click on the plus sign to open the comments window.



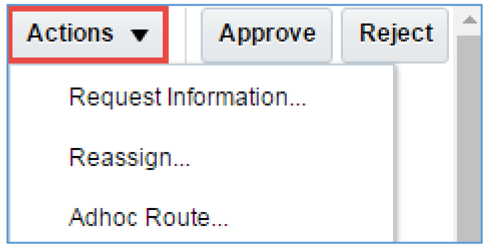
7. Add comments, then click **OK**.



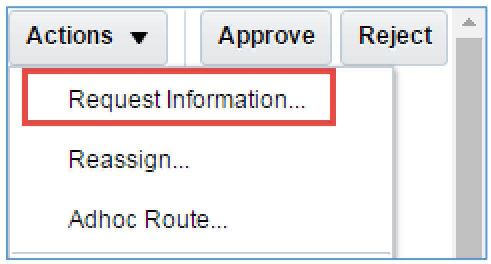
The notes will show under the **Comments** section.



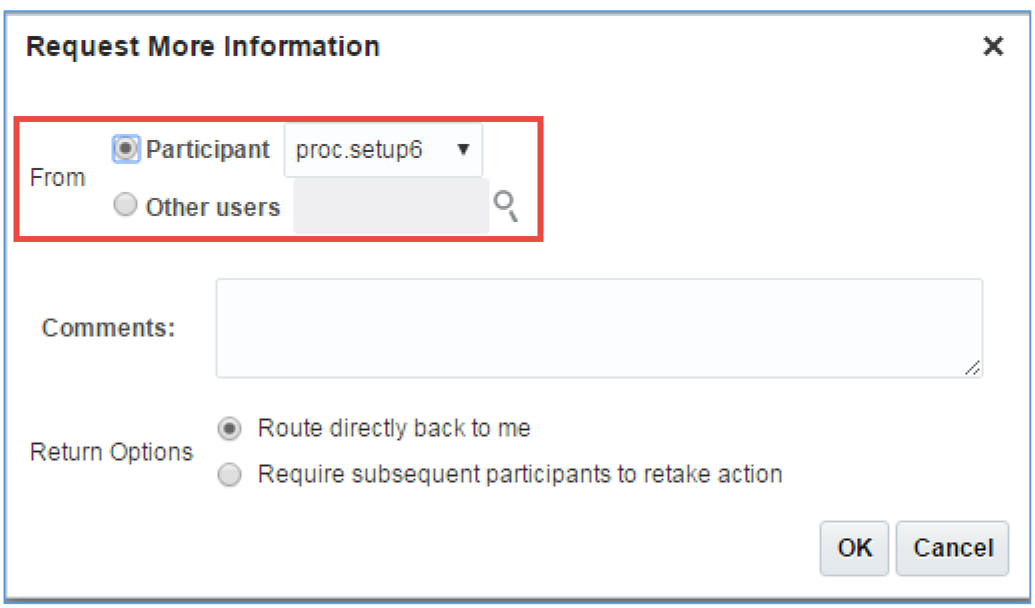
8. Click on the **Actions** drop-down menu to view several options. Action items may vary based on user profile.



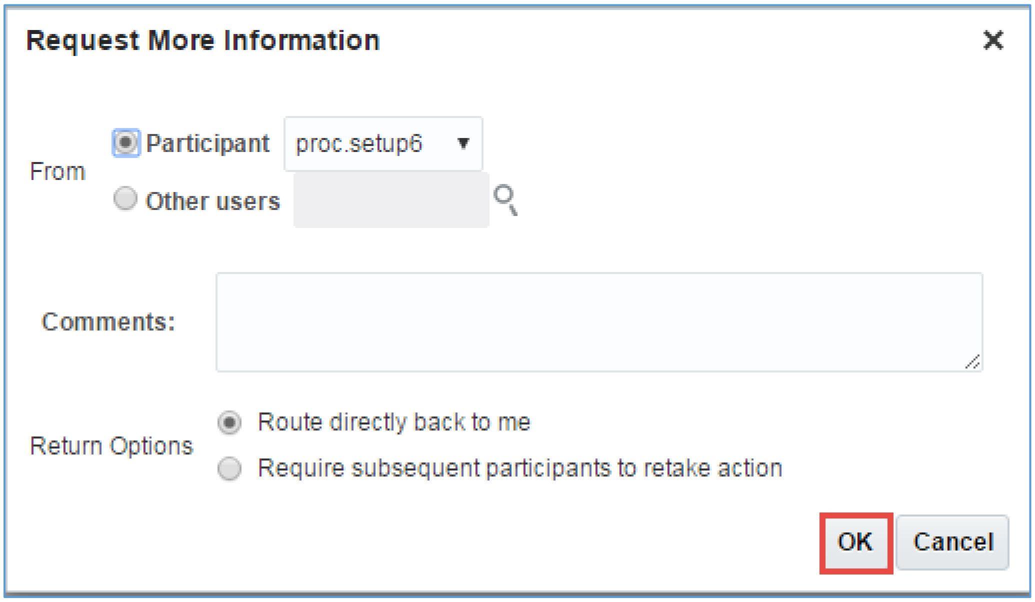
9. Click on **Request Information** to request further detail from anyone in the requisition work flow on the requisition.



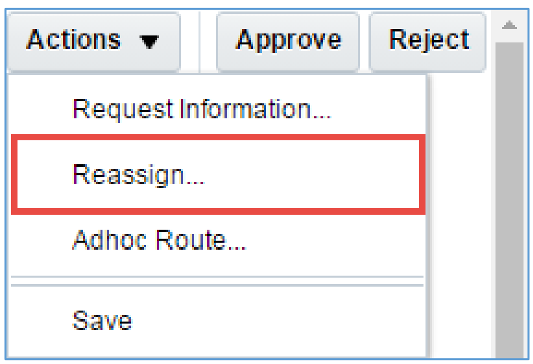
10. Select the drop-down arrow next to **Participant** and choose OR click the radio button next to **Other** users and do a search for the name of the person to request more information from.



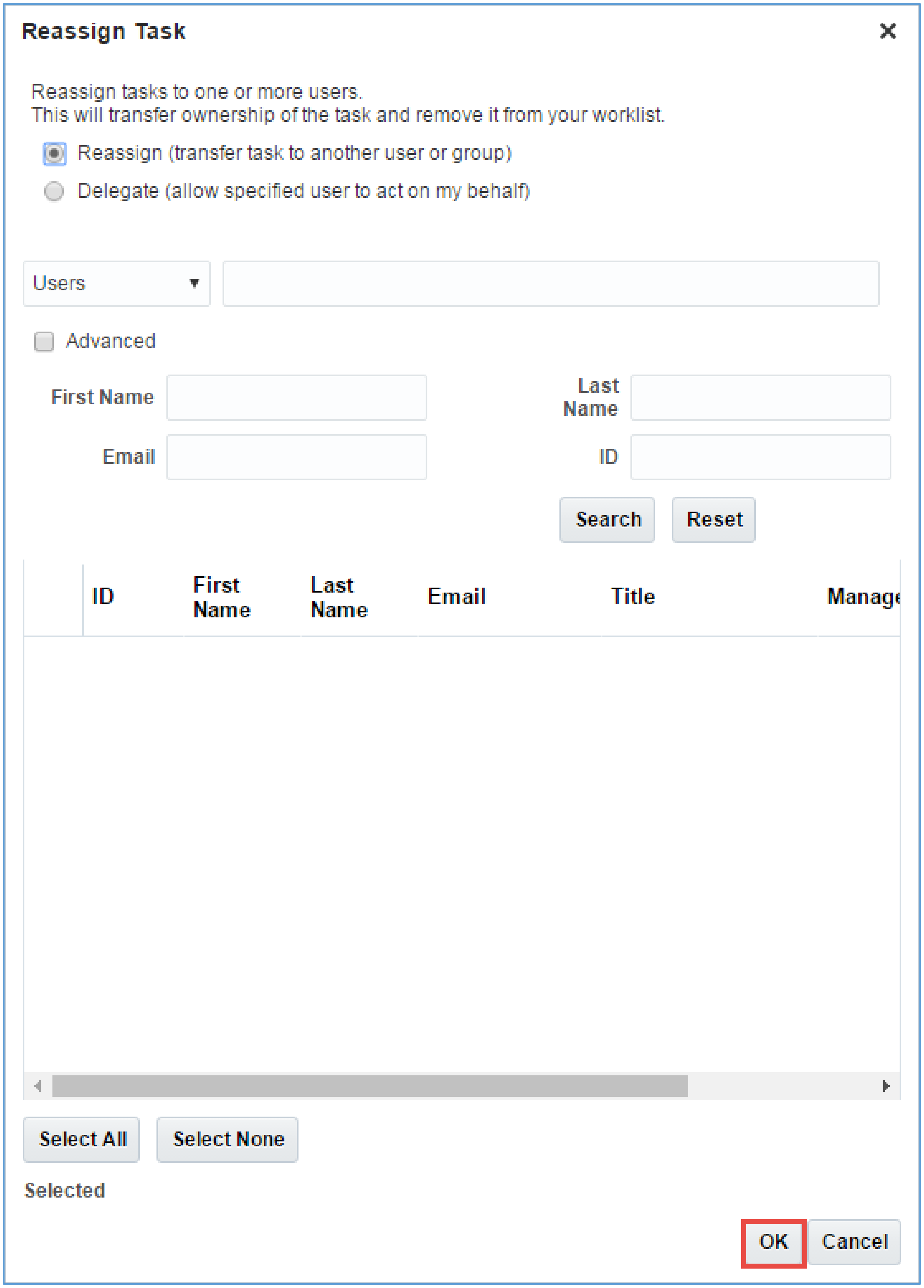
11. Click **OK.**



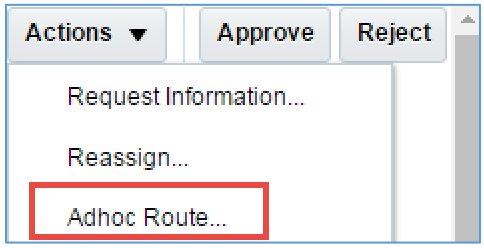
12. OPTIONAL - Click **Reassign** to transfer the task to another user or group if necessary.



13. Fill out the fields to reassign the task to another employee, or search for them. Once information is added, click **OK**.

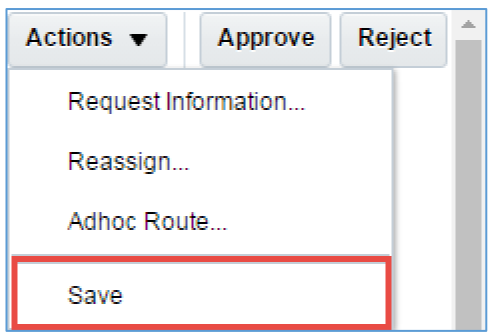


Note: Adhoc Route will not be used currently.



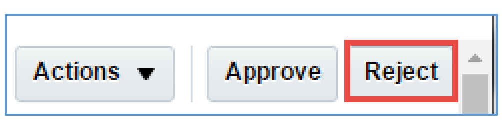
14. Click **Save** to exit to the notification page without approving or rejecting the requisition.

Note: Save allows you to exit from the page; changes will not be made to the requisition. If changes need to be made, use **Request Information** and send it back to the employee for that person to update or change information, then resubmit the requisition.



15. Click **Approve** to approve the requisition.

16. Click **Reject** if the requisition is not approved. This will send the requisition back to the initiator for edits or cancelation.



Final Notes

By following these steps, you have successfully reviewed approved, rejected, or reassigned a requisition.