

## Module Name: Review and Approve Requisitions

*For employees approving requisitions*

**Purpose:** Review and approve Requisitions.

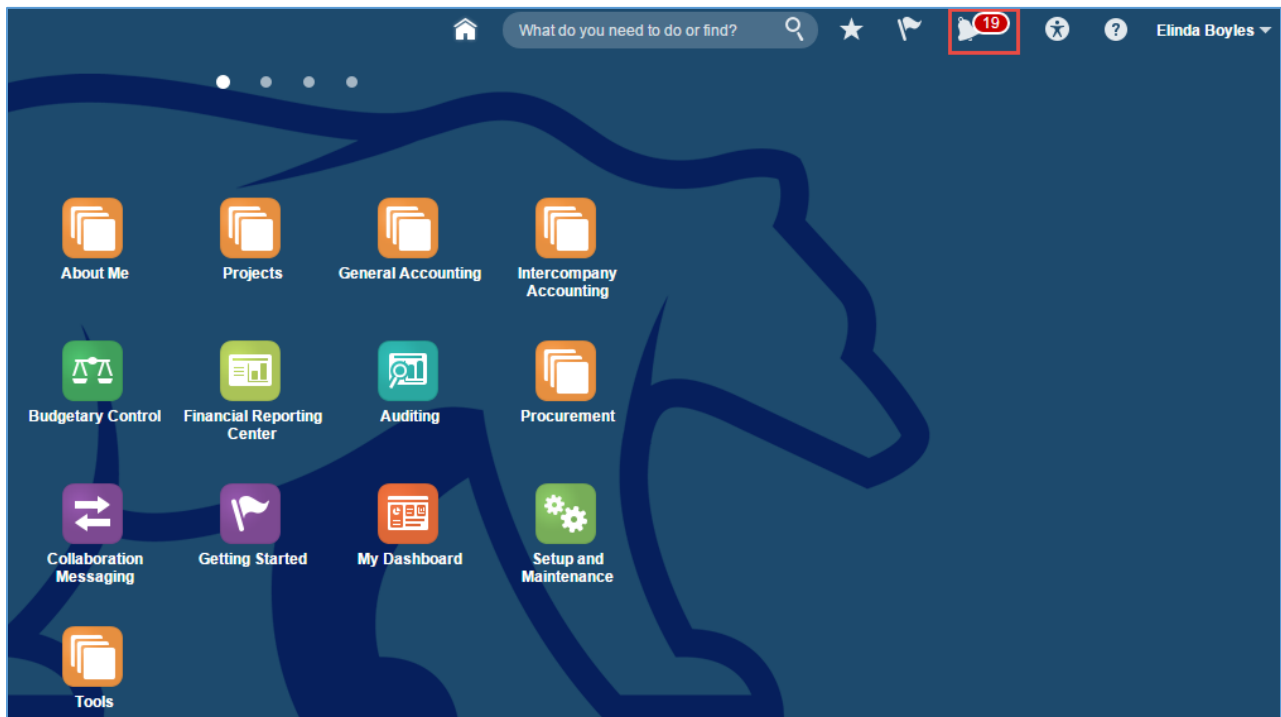
**How to Access:** Log into the [Bear Trax](#) application and enter **Purchase Requisition** in the Search field then select the **Purchase Requisitions** task in the Navigator.

**Helpful Hints:** Be sure to keep in mind that...

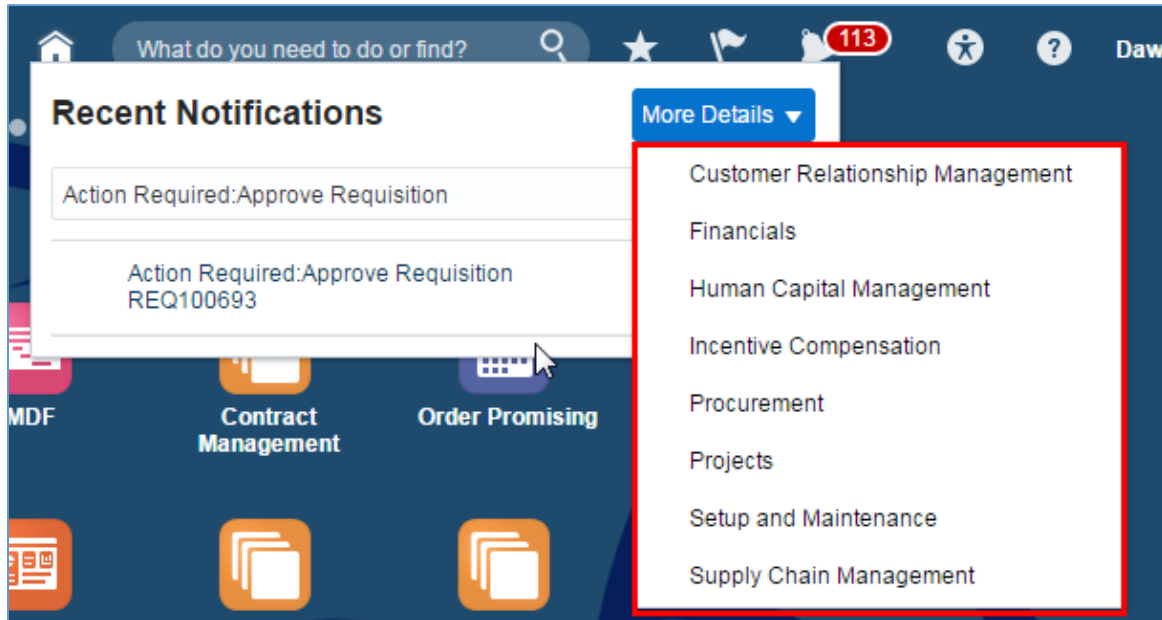
- These are steps to review and approve requisitions as a manager
- Managers will receive email notifications that they have approvals in Bear Trax
- Make sure to check pop up blocker if the requisition window does not open
- Approvers cannot make changes to the requisitions
- Approvers can make comments 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.

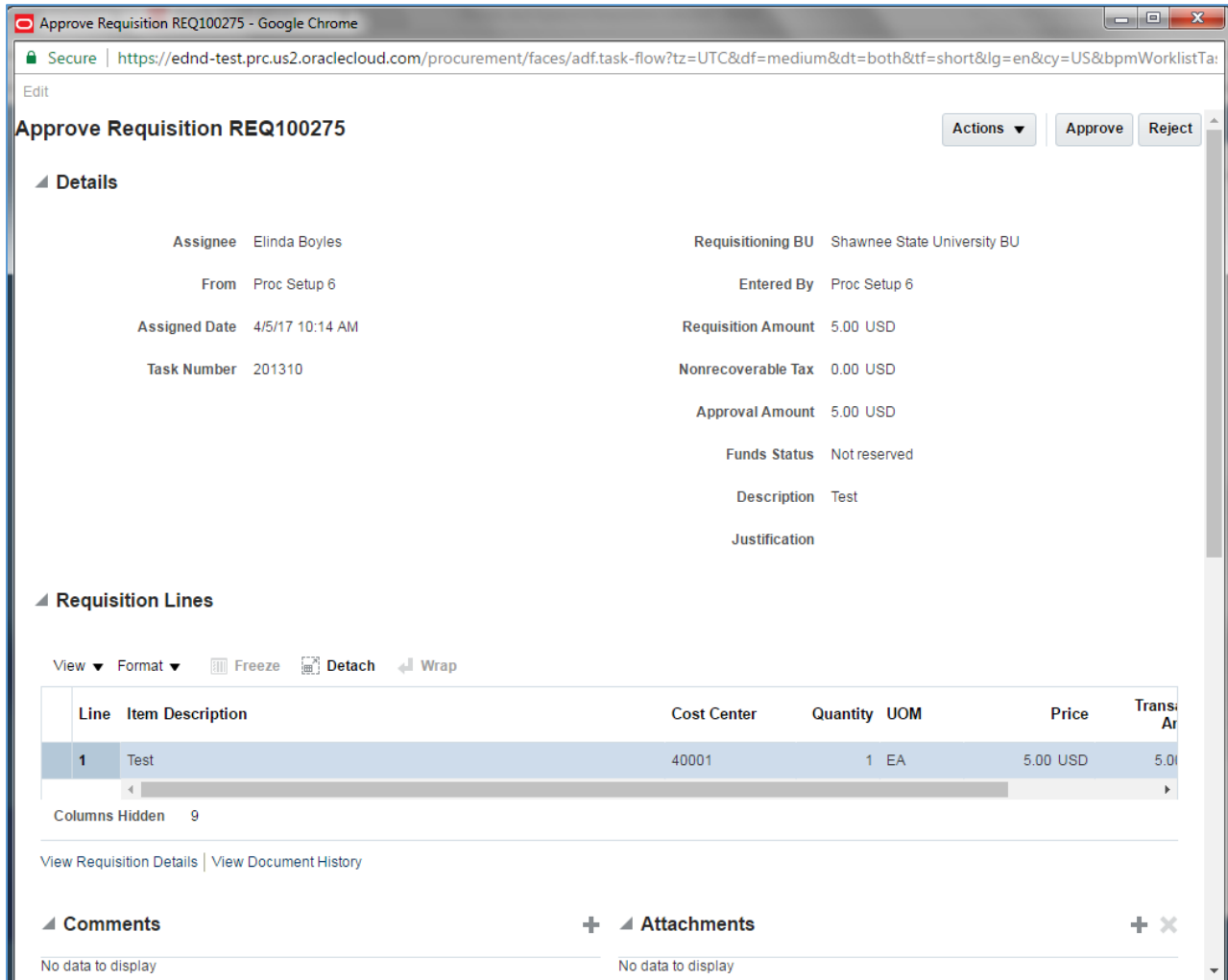


3. Select the requisition to be approved.

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

Recent Notifications		More Details ▼
Enter search terms <input type="text"/>		
Action Required:Expense Report Approval EX0009178960 for Greg Ballengee (USD 6,000.00)	4/5/17	
Action Required:Approve Requisition REQ100278	4/5/17	
Approve Requisition REQ100278	4/5/17	
Action Required:Approve Requisition REQ100278	4/5/17	
Action Required:Approve Requisition REQ100275	4/5/17	
Action Required:Approve Requisition REQ100274	4/5/17	
Action Required:Approve Requisition REQ100271	4/5/17	

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

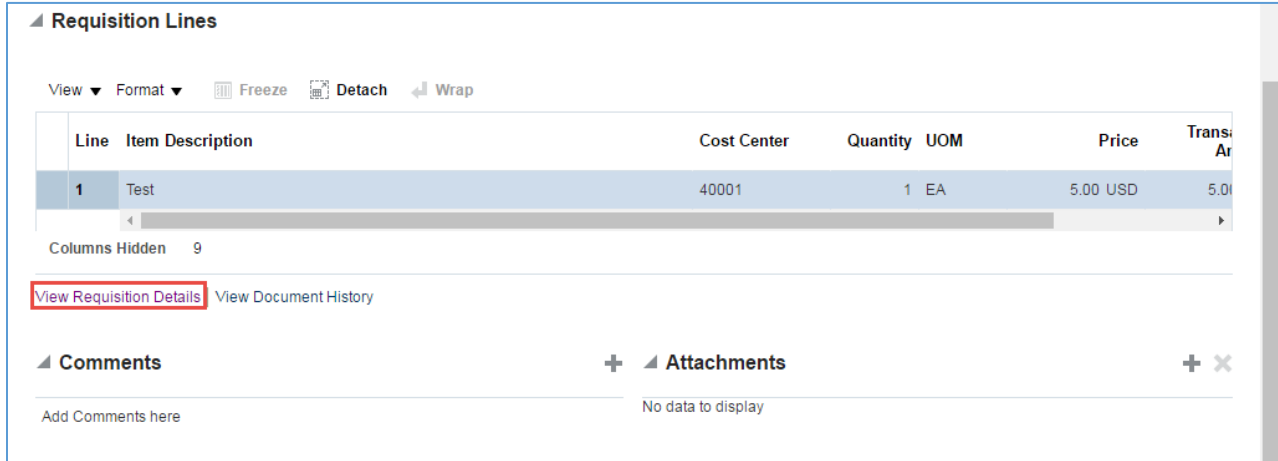


The screenshot shows a web browser window titled "Approve Requisition REQ100275 - Google Chrome". The URL is <https://ednd-test.prc.us2.oraclecloud.com/procurement/faces/adf.task-flow?tz=UTC&df=medium&dt=both&tf=short&lg=en&cy=US&bpmWorklistTa>. The page content includes:

- Header:** "Approve Requisition REQ100275" with an "Edit" link and "Actions", "Approve", and "Reject" buttons.
- Details Section:**
  - Assignee: Elinda Boyles
  - From: Proc Setup 6
  - Assigned Date: 4/5/17 10:14 AM
  - Task Number: 201310
  - Requisitioning BU: Shawnee State University BU
  - Entered By: Proc Setup 6
  - Requisition Amount: 5.00 USD
  - Nonrecoverable Tax: 0.00 USD
  - Approval Amount: 5.00 USD
  - Funds Status: Not reserved
  - Description: Test
  - Justification:
- Requisition Lines Section:**
  - View, Format, Freeze, Detach, Wrap options.
  - Table with columns: Line, Item Description, Cost Center, Quantity, UOM, Price, Trans Ar.
  - Table content:

Line	Item Description	Cost Center	Quantity	UOM	Price	Trans Ar
1	Test	40001	1	EA	5.00 USD	5.00
  - Columns Hidden: 9
  - Links: View Requisition Details | View Document History
- Comments and Attachments:**
  - Comments: No data to display
  - Attachments: No data to display

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



**Requisition Lines**

View Format Freeze Detach Wrap

Line	Item Description	Cost Center	Quantity	UOM	Price	Trans Ar
1	Test	40001	1	EA	5.00 USD	5.00

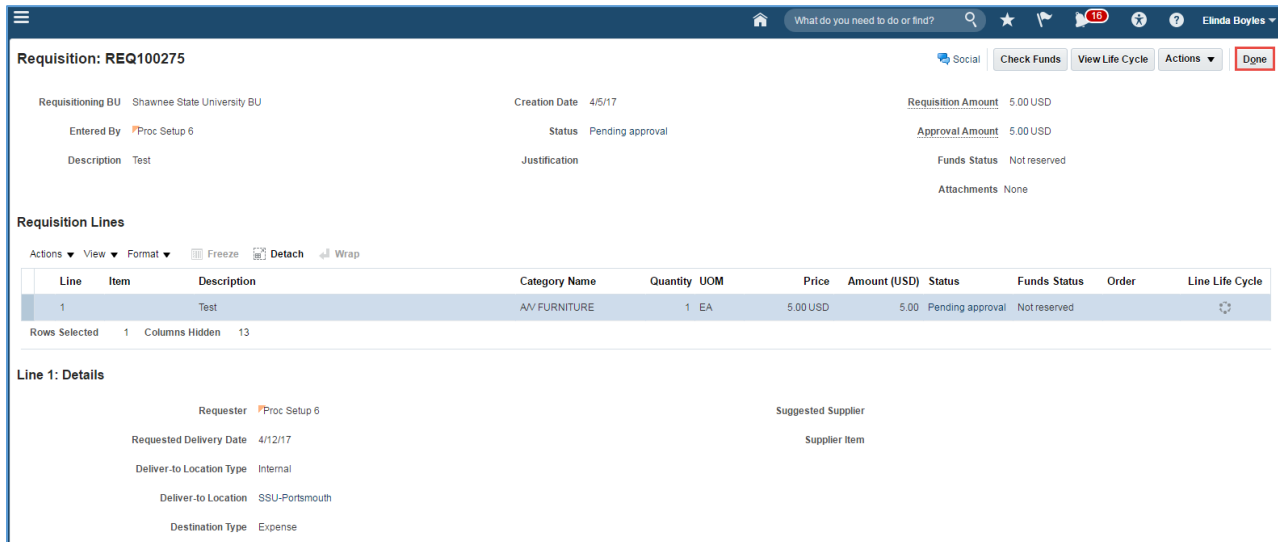
Columns Hidden 9

[View Requisition Details](#) [View Document History](#)

**Comments** + **Attachments** + X

Add Comments here No data to display

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



Requisition: REQ100275

Requisitioning BU Shawnee State University BU Creation Date 4/5/17 Requisition Amount 5.00 USD

Entered By Proc Setup 6 Status Pending approval Approval Amount 5.00 USD

Description Test Justification Funds Status Not reserved Attachments None

**Requisition Lines**

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life Cycle
1	Test		AV FURNITURE	1	EA	5.00 USD	5.00	Pending approval	Not reserved		

Rows Selected 1 Columns Hidden 13

**Line 1: Details**

Requester Proc Setup 6 Suggested Supplier


Requested Delivery Date 4/12/17 Supplier Item

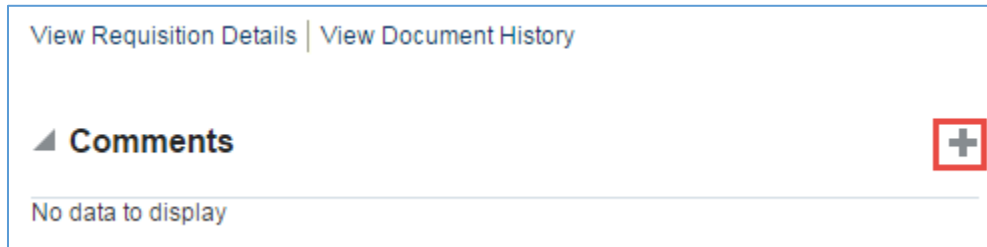
Deliver-to Location Type Internal

Deliver-to Location SSU-Portsmouth

Destination Type Expense

Social Check Funds View Life Cycle Actions Done

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

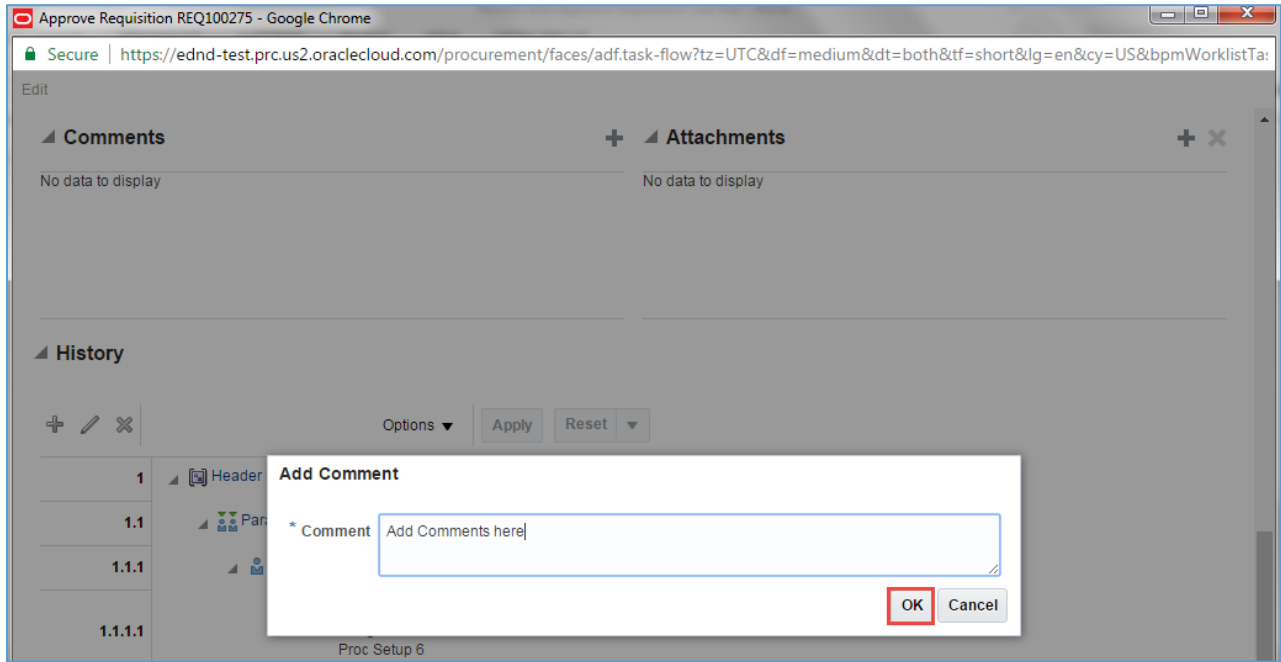


[View Requisition Details](#) | [View Document History](#)

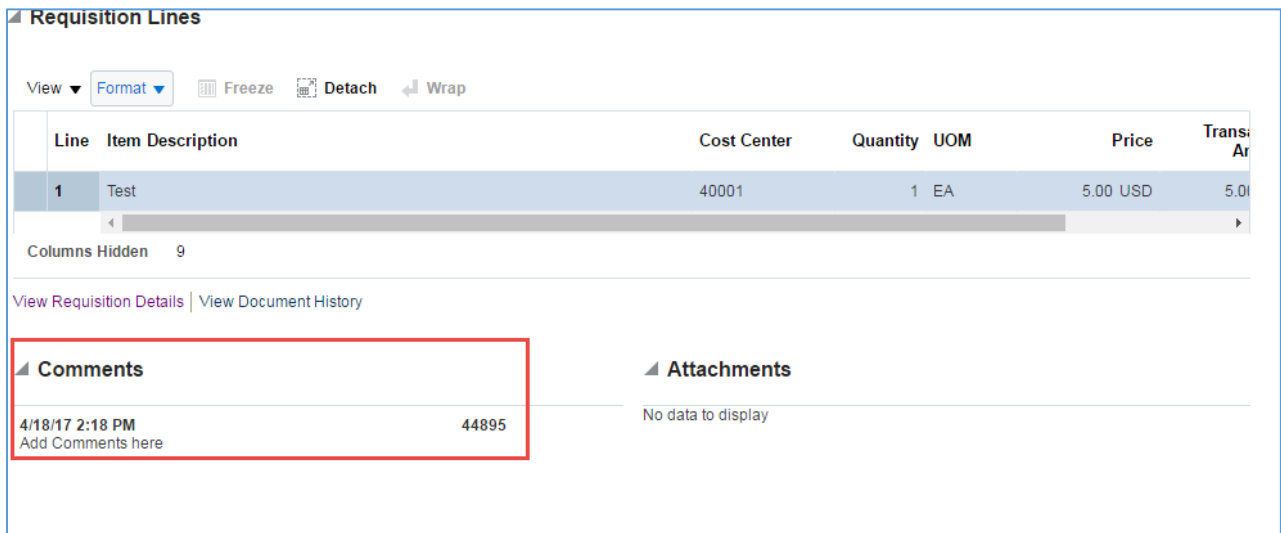
**Comments** +

No data to display

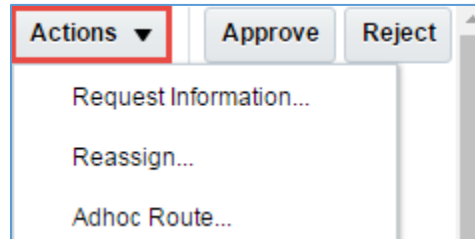
7. Add comments, then click **OK**.



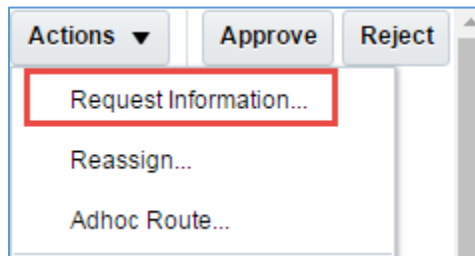
The notes will show under the **Comments** section.



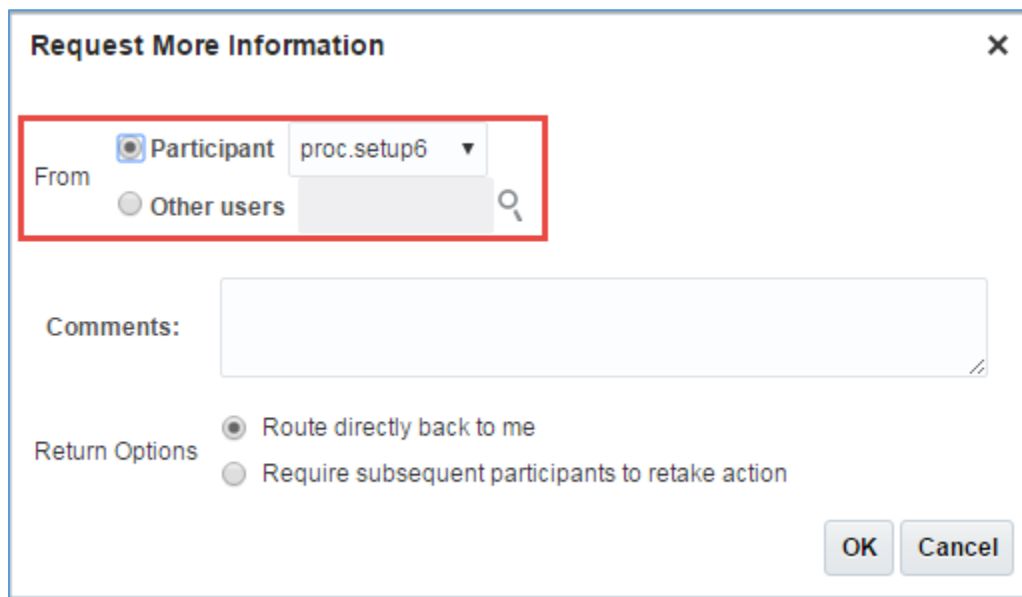
8. Click on the **Actions** drop-down menu to view several options. Action items may vary based on user profile.



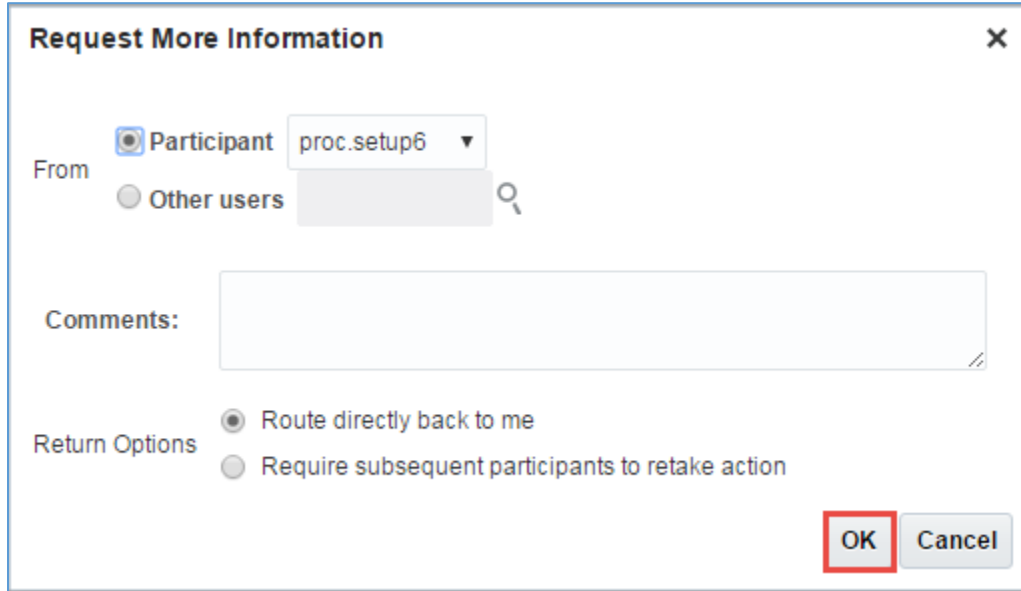
9. Click on **Request Information** to request further detail from anyone in the requisition work flow on the requisition.



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.



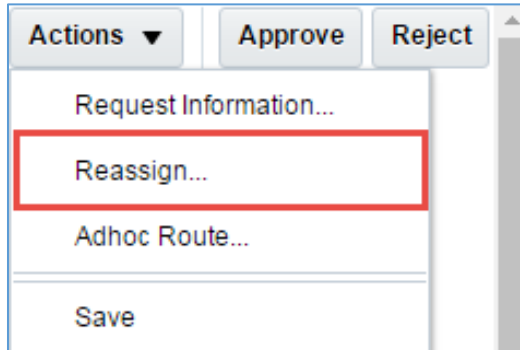
11. Click **OK**.



The dialog box is titled "Request More Information" and has a close button (X) in the top right corner. It contains the following elements:

- From:** A radio button labeled "Participant" is selected. Next to it is a dropdown menu showing "proc.setup6". Below this is another radio button labeled "Other users" followed by a search input field with a magnifying glass icon.
- Comments:** A large, empty text area for entering comments.
- Return Options:** Two radio buttons: "Route directly back to me" (selected) and "Require subsequent participants to retake action".
- Buttons:** "OK" and "Cancel" buttons are located at the bottom right. The "OK" button is highlighted with a red rectangular box.

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



The image shows a menu with the following items:

- Actions ▼
- Approve
- Reject
- Request Information...
- Reassign...** (highlighted with a red rectangular box)
- Adhoc Route...
- Save

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

### Reassign Task ✕

Reassign tasks to one or more users.  
This will transfer ownership of the task and remove it from your worklist.

Reassign (transfer task to another user or group)  
 Delegate (allow specified user to act on my behalf)

Users ▼

Advanced

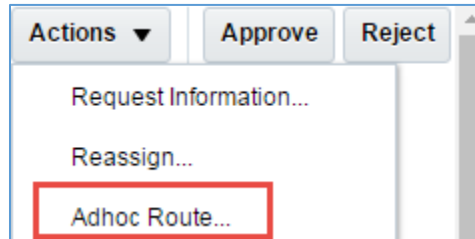
First Name  Last Name   
Email  ID

ID	First Name	Last Name	Email	Title	Manage
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Selected

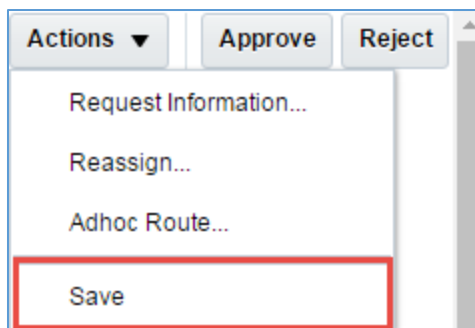


**Note:** Adhoc Route will not be used currently.

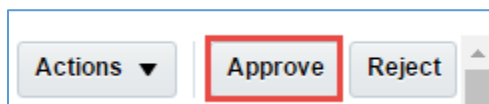


14. Click **Save** to exit to the notification page without approving or rejecting the requisition.

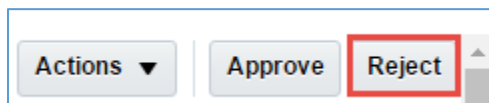
**Note:** Save allows you to exit from the page; changes will not be made to the requisition. If changes need to be made, use **Request Information** and send it back to the employee for that person to update or change information, then resubmit the requisition.



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.