1.1 Your Tasks

When a requisition is saved which requires your approval, you will receive a workflow task in Your tasks list. The number next to the tick on the application toolbar shows how many tasks you have. Click the tick to open Your tasks list.

Your tasks – the requisitions are shown in Your tasks list. The title of the task contains a description of the type of approval required (in this example Budget Holder), and the order number (OrderNo). Click a task to open it.

1.2 Requisition Approval Screen

The requisition opens in the Requisition approval screen. The Requisition information section shows the name of the requisitioner, the Requisition number and the delivery address.

The Workflow log provides a transcript of all the steps the requisition has taken since its initial submission into workflow. If the requisition has previously been rejected and resubmitted, this information will be shown here.

The Requisition details table shows the information about the products on the requisition. This includes the Product description, Supplier, Quantity and Price. Hover your mouse cursor above a field to view the full text in the field.

The GL Analysis table shows the coding information for the currently active row in the Requisition details table. This includes the Analysis and Workord codes and the Tax information. The Amount field shows the amount that has been coded to the work order.
2.1 Approving Requisitions in Simple Mode

The Requisition approval screen opens in Simple mode by default and the whole requisition is approved or rejected using the Approve and Reject buttons at the bottom of the screen.

1. After reviewing the information in the Requisition details table and the GL Analysis table for each item on the requisition:
   - Click Approve to approve the requisition.
   - Click Reject to reject the requisition.

2. If you click Reject, a window opens containing an Enter your comment field. Enter the reason that you are rejecting the requisition and click Reject.

2.2 Approving Requisitions in Advanced Mode

Multi-row requisitions can be processed in Advanced mode. Advanced mode allows you to process individual rows, for example to approve one row and reject another row on a requisition.

1. Click Advanced mode at the bottom of the Requisition approval screen to switch to Advanced mode.

2. Click a row in the Requisition details table to activate the row. Review the information for that row in the Requisition details table and the GL Analysis table. Click the Approve or Reject button beneath the Requisition details table. The Status for that row will update to show Approve or Reject.

3. If you reject a row, you must enter the reason that you have rejected the row in the (Enter your comment) field in the Workflow log. Ensure that the rejected row is active in the Requisition details table.

4. When all of the rows have been processed, scroll to the bottom of the screen and click Save.