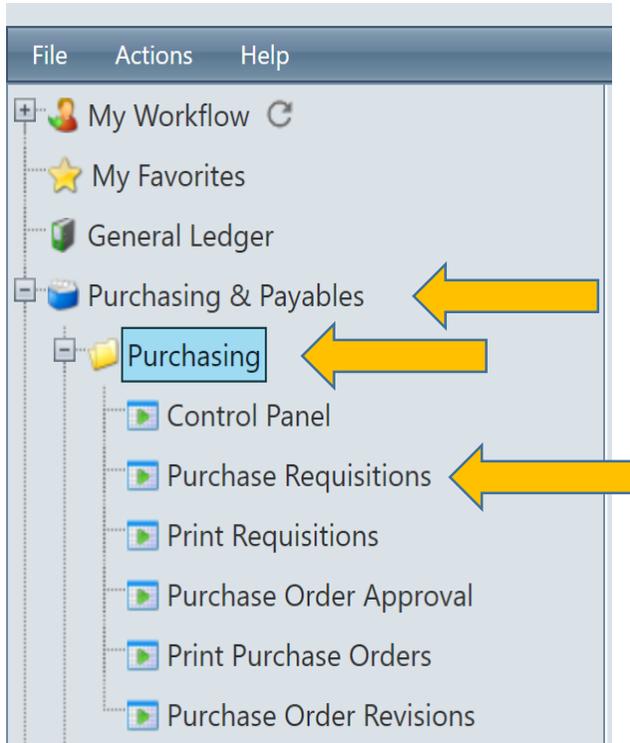


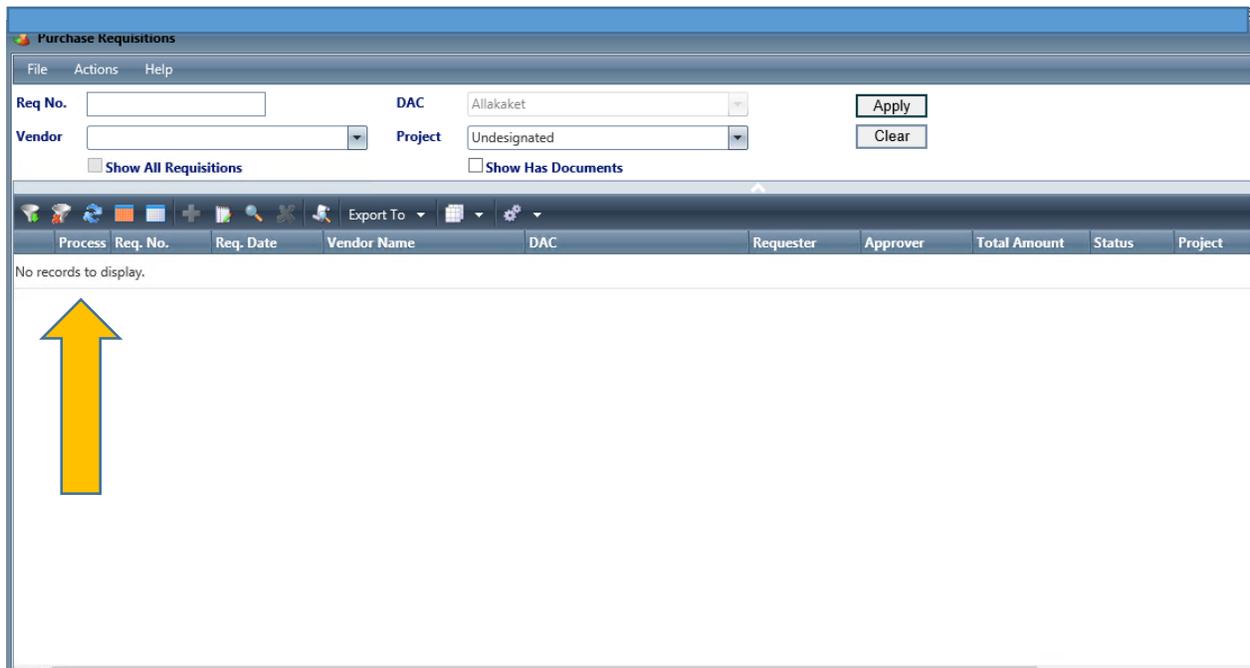
APPROVING PURCHASE REQUISITIONS

Login to iVisions Workflow to approve Purchase Requisitions waiting for your approval.

Go to Purchase Requisitions (Purchasing & Payables / Purchasing / Purchase Requisitions).



The following window will open. You will see in the example below there are “no records to display”. This means you do not have any Purchase Requisitions in your approval queue to review and approve or disapprove.



If you have requisitions to approve they will be listed when you click on “Purchase Requisitions” from the Workflow Menu. In the example below, an approver has four Purchase Requisitions in their queue to review and approve or disapprove.

The screenshot shows the 'Purchase Requisitions' application window. At the top, there are search filters for 'Req No.', 'Vendor', 'DAC', and 'Project'. Below these is a table with the following columns: Process, Req. No., Req. Date, Vendor Name, DAC, Requester, Approver, Total Amount, Status, Project, Internal Notes, and Pur. The table contains four rows of data:

Process	Req. No.	Req. Date	Vendor Name	DAC	Requester	Approver	Total Amount	Status	Project	Internal Notes	Pur
<input type="checkbox"/>	10113	01/02/2018	STAPLES	Business			\$1,041.16	Open	Undesignated		
<input type="checkbox"/>	10051	12/21/2017	QUALITY SALES FOOD SERVICE	District			\$614.06	Open	Undesignated		
<input type="checkbox"/>	10038	12/19/2017	WRIGHT AIR SERVICE, INC.	District			\$2,500.00	Open	Undesignated		
<input type="checkbox"/>	10035	01/01/2018	WRIGHT AIR SERVICE, INC.	District			\$1,540.00	Open	Undesignated		

A yellow arrow points to the 'Approver' column, which is currently empty for all items. Text next to the arrow states: "Your ID will display in the 'Approver' column".

Double click on any part of a Purchase Requisition line to review the details of the order, such as items, price and account code. If you are ready to take “Action” on the Purchase Requisition, then check the “Process” box to the left of the requisition number (see example below for Purchase Requisition #10113).

The screenshot shows the 'Purchase Requisitions' application window with the same table as above. The 'Process' checkbox for requisition #10113 is now checked. A yellow arrow points to this checkbox. Another yellow arrow points to the left side of the table, indicating that double-clicking on a row will open a detailed view.

Process	Req. No.	Req. Date	Vendor Name	DAC	Requester	Approver	Total Amount	Status	Project	Inte
<input checked="" type="checkbox"/>	10113	01/02/2018	STAPLES	Business			\$1,041.16	Open	Undesignated	
<input type="checkbox"/>	10051	12/21/2017	QUALITY SALES FOOD SERVICE	District			\$614.06	Open	Undesignated	
<input type="checkbox"/>	10038	12/19/2017	WRIGHT AIR SERVICE, INC.	District			\$2,500.00	Open	Undesignated	
<input type="checkbox"/>	10035	01/01/2018	WRIGHT AIR SERVICE, INC.	District			\$1,540.00	Open	Undesignated	

After checking the “Process” box or boxes click on “Action” from the menu at the top and select the action you wish to take on the Purchase Requisition or group of Purchase Requisitions selected. You can return the requisition to the originator, return the requisition to the prior approver, or approve the Purchase Requisition. You can even check the budget for the account code used for the PR and check the approval log.

Req No	Vendor	Vendor Name	DAC	Requester	Approver	Total Amount	Status	Project	Internal Notes
1		STAPLES	Business	Jenny Martens	419968,jmartens	\$1,041.16	Open	Undesignated	
2		QUALITY SALES FOOD SERVICE	District			\$614.06	Open	Undesignated	
3		WRIGHT AIR SERVICE, INC.	District	Trevor Bridgewater	419968,jmartens	\$2,500.00	Open	Undesignated	
4		WRIGHT AIR SERVICE, INC.	District	Chane Beam	419968,jmartens	\$1,540.00	Open	Undesignated	

Once you have approved or returned a Purchase Requisition it will no longer show in your approval queue.

If you return the Purchase Requisition to the originator or prior approver you will have the opportunity to send an email and/or internal note. It is recommended you send at least an email to the person letting them know why you are returning the Purchase Requisition.