

iProcurement – Requisitions Requiring Grant Approval

Some purchases that are made using Grant accounts require approval from the Sponsored Programs Office, currently that approver is Michele Mullings-Shand. If you are making a purchase that requires Michele’s approval, using iProcurement to create the requisition will not change anything about that process. During the approval process, the requisitioning department will “Approve and Forward” the requisition to Michele for final approval through the *notifications*.

Create the requisition using the Grant account.

The screenshot shows the Oracle iProcurement interface for creating a requisition. The top navigation bar includes 'Shop', 'Requisitions', 'Receiving', and 'Contractors'. The main content area is titled 'Requisition Information' and includes a 'Checkout: Requisition Information' section. A red arrow points to the 'Submit' button in the top right corner. The 'Requisition Description' field contains 'Consulting on "Audio Impluse" project, 9/15/15 - 6/30'. The 'Delivery' section includes fields for 'Urgent' (unchecked), 'Need-By Date' (19-Sep-2015 00:00:00), 'Requester' (Klein, Katherine M), and 'Deliver-To Location' (NFH 0601). The 'Billing' section includes 'Charge Account' (5692.00.22701.65910.0000.11.0000.000) and 'GL Date' (17-Sep-2015). Buttons for 'Cancel', 'Save', 'Submit', and 'Edit Lines' are visible at the bottom right.

On the Approvals and Notes screen, you may notice that your requisition will route all the way up to the President. DO NOT use Manage Approvals to insert Michele; that process will not work for Grant approvals. Instead, use the approval notification Approve & Forward option to route to Michele. In this instance, the requisition will route to the Department Head next.

The screenshot shows the Oracle iProcurement interface for the 'Approvals and Notes' screen. The top navigation bar includes 'Shop', 'Requisitions', 'Receiving', and 'Contractors'. The main content area is titled 'Approvals and Notes' and includes a 'Checkout: Approvals and Notes' section. The 'Approvals' section shows a list of approvers: Callahan, William; Woelber, Patricia; Wohlpart, Alfred; and Ruud, William. A 'Manage Approvals' button is visible. The 'Notes' section includes fields for 'Justification' and 'Note To Buyer'. Buttons for 'Save', 'Submit', and 'Back' are visible at the bottom right.

The Department Head will receive a notification that the requisition needs to be approved.

The screenshot shows the Oracle Applications Home Page. On the left is a 'Main Menu' with links like 'Budget Salary Increases', 'Budget User', 'FIN COE', 'Supervisor Self Service', 'UNI Employee Self Service', and 'UNI Workflow User'. On the right is a 'Worklist' table with columns 'From', 'Type', 'Subject', 'Sent', and 'Due'. A red arrow points to the subject of the first notification: 'Standard Purchase Order 801537 has been approved for Requisition 80472'.

| From | Type | Subject | Sent | Due |
|------------------|-------------|--|-------------|-------------|
| Westhoff, Jon | PO Approval | Standard Purchase Order 801537 has been approved for Requisition 80472 | 26-Aug-2015 | |
| Klein, Katherine | Requisition | Purchase Requisition 80735 for Klein, Katherine (4000.00 USD) | 17-Sep-2015 | 20-Sep-2015 |

Once the Department Head clicks on the notification, the screen will open that will allow the “Approve and Forward” action. At the bottom of the screen in the Response section, use the magnifying glass to search for Michele Mullings-Shand. Once she is selected, click the Approve and Forward button.

The screenshot shows the Oracle Applications requisition detail page for 'Purchase Requisition 80735 for Klein, Katherine (4000.00 USD)'. It includes a header with 'Approve', 'Approve And Forward', 'Forward', 'Reject', 'Delegate', and 'Request Information' buttons. Below is a 'Requisition Lines' table with one line for 'Consulting on "Audio Impluse" project, 9/15/15 - 6/30/16 per quote #1FS789-00'. An 'Approval Sequence' diagram shows a flow from Callahan, William P to Woelber, Patricia G, then to Wohlpart, Alfred James, and finally to Ruud, William N, who is currently 'In Process'. Below the diagram is a table of actions: Submitted (Klein, Katherine M), Reserved (Klein, Katherine M), and Pending (Callahan, William P; Woelber, Patricia G; Wohlpart, Alfred James; Ruud, William N). The 'Related Applications' section has links for 'Edit Requisition' and 'View Requisition Details'. The 'Response' section has a 'Forward To' dropdown set to 'All Employees and Users' and a search field containing 'Mullings-Shand, Michele'. A red arrow points to the search field, and another red arrow points to the 'Approve And Forward' button at the bottom.

| Line | Description | Supplier | Cost Center | Unit | Quantity | Price (USD) | Amount (USD) |
|------|---|--------------------------------------|-------------|-----------|----------|-------------|--------------|
| 1 | Consulting on "Audio Impluse" project, 9/15/15 - 6/30/16 per quote #1FS789-00 | CORE Education & Consulting Services | 22701 | US DOLLAR | 4000 | 1 | 4000.00 |

| Num | Name | Action | Action Date | Note |
|-----|------------------------|-----------|----------------------|------|
| 1 | Klein, Katherine M | Submitted | 17-Sep-2015 10:49:42 | |
| 2 | Klein, Katherine M | Reserved | 17-Sep-2015 10:49:46 | |
| 3 | Callahan, William P | Pending | | |
| 4 | Woelber, Patricia G | | | |
| 5 | Wohlpart, Alfred James | | | |
| 6 | Ruud, William N | | | |

Once this is done, the requisition will route to Michele. This can be verified by logging back into iProcurement, clicking on the Requisition tab, and clicking on the Status of the requisition. Notice the routing no longer shows going up to the President, but stops at Michele.

Approval History for Requisition 80735



| Sequence | Approver | Organization Name | Action | Action Date | Notes |
|----------|-------------------------|-------------------|-----------|----------------------|-------|
| 5 | Mullings-Shand, Michele | UNI | Pending | | |
| 4 | Callahan, William P. | UNI | Forwarded | 17-Sep-2015 10:57:36 | |
| 3 | Callahan, William P. | UNI | Approved | 17-Sep-2015 10:57:36 | |
| 2 | Klein, Katherine M. | UNI | Reserved | 17-Sep-2015 10:49:46 | |
| 1 | Klein, Katherine M. | UNI | Submitted | 17-Sep-2015 10:49:42 | |

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