

Quick Reference Guide

Approving Requisitions

In the Oracle Application

APPROVING REQUISITIONS

Approvers receive notification via e-mail that a requisition requires approval. Approvers can view the notification details and approve, amend or reject the requisition.

Requisitions not approved within 4 days of receipt will either timeout and are returned to the preparer or automatically route to the next level approver (when one has been defined).

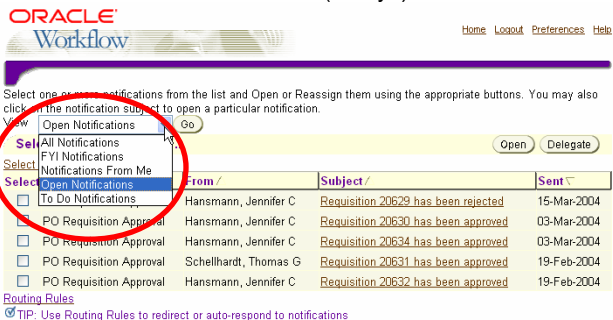
If you prepared the Requisition and are also the approver, the Requisition will automatically be approved and you will not need to complete the following steps.

REVIEW REQUISITION NOTIFICATION

- 1) Login to MEMFIS applications via MyUNiverse.
- 2) Click on UNI Workflow User



- 3) A Workflow list will appear which has defaulted to Open Requisitions. Note the directions at the top of the screen. Notifications can be viewed by type. Clicking the drop down list displays the types of notifications that can be viewed.
 - Open Notifications – includes FYI and To Do Notifications. To Do will appear in this list until action is taken or it times out (4 days). FYI, then they will move to All Notifications
 - All Notifications – displays all types of Notifications.
 - FYI Notifications – information only Notifications. These will autoclose in 5 days and purge from the list 5 days after closing.
 - Notifications from Me – Notifications routed to others from you.
 - To Do Notifications - will appear until action is taken or the notification times out (4 days)



- 4) Click on the subject of the Notification to display the details of the notification (see illustration below).

Select Notification(s) and ... Open Delegate

Select All | Select None

Select Type	From /	Subject /	Sent
<input type="checkbox"/> PO Requisition Approval	Hansmann, Jennifer C	Requisition 20629 has been rejected	15-Mar-2004
<input type="checkbox"/> PO Requisition Approval	Hansmann, Jennifer C	Requisition 20630 has been approved	03-Mar-2004
<input type="checkbox"/> PO Requisition Approval	Hansmann, Jennifer C	Requisition 20634 has been approved	03-Mar-2004
<input type="checkbox"/> PO Requisition Approval	Schellhardt, Thomas G	Requisition 20631 has been approved	19-Feb-2004

- 5) Review the Notification Details window that displays. Requisition 20659 for Whitt, Patricia B (299.40 USD) requires approval

From: Mark, Marty L
 To: Hansmann, Jennifer C
 Sent: 18-Mar-2004 14:05:26
 Due: 21-Mar-2004 14:05:26
 Notification ID: 131552

Requisition Summary

Requisition Total	299.40 USD
Description	
Forwarded From	Mark, Marty L
Created By	Whitt, Patricia B
Justification	

Requisition Lines

The first five requisition lines are summarized below. For additional information, click the [View Requisition Details](#) link.

[View Requisition Details](#) | [Edit Requisition](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	Imation CD-R Mini Disk w/jewel case 185 MB Neon. pk/5 #107-263		40011	BOX OF 5	60	4.99 USD	299.40

Approval History

Who	Action	Date	Note
Hansmann, Jennifer C			
Whitt, Patricia B	Forward	18-MAR-2004	
Whitt, Patricia B	Submit	18-MAR-2004	
Whitt, Patricia B	Reserve	18-MAR-2004	
Whitt, Patricia B	Submit	18-MAR-2004	

References

Forward To:

Note:

Return to Worklist

Display next notification after my response

REVIEW ACCOUNT NUMBER

To display the account(s) to which each line of the requisition is charged perform steps 6-10, otherwise skip to step 11 to approve.

- 6) Click on the "Reference" button in the lower part of the Notification Details window (see illustration circled above).

For questions, please contact the Help Desk at 3-5555, option #2 or email memfis-help@uni.edu.

For questions about this document, please contact Pat Whitt, MEMFIS Trainer, at 3-6881.

Quick Reference Guide

Approving Requisitions

In the Oracle Application

- 7) After clicking the Reference button be patient! This action will load j-initiator. The Notifications to Requisitions form will display **behind** your Notification list. Minimize your list to reveal form. Click the Distributions button to reveal the charge account to which this expense has been charged.

Notifications to Requisitions (UNIA) - 158

Number: 158, Type: Purchase Req, Status: In Process, Re, Preparer: Student68, lma J, Total: USD 5250.00

Num	Type	Item	Rev	Category	Description	UOM	Q
1	Goods			10500	check supplies	BOX	1

Destination Type: Expense, Source: Supplier, Requestor: Student68, lma J, Organization: University of Northern Iowa, Location: GIL 224

Distributions

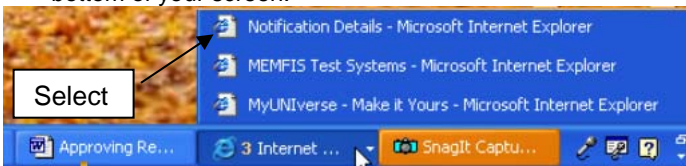
- 8) Review the charge account field.
- The charge account displayed is for the line of the requisition selected.
 - If the requisition line is charged to more than one account the Distribution form will display multiple distribution lines.
 - After viewing distributions close the forms.

Distributions (University of Northern Iowa) - 16950

Num	Quantity	Charge Account	Recovery Rate	GL Date	Budget Account
1		0011.04.40011.62010.0000.61.0		13-AUG-2003	0011.04.40011.62010. N

Account Description: Charge: Gnl Educ Fund.APY 2004.VP Administ, Budget: Gnl Educ Fund.APY 2004.VP Administ, Accrual: Gnl Educ Fund.-UNI.Accrued Expens, Variance: Gnl Educ Fund.APY 2004.VP Administ

- 9) Return to the Notification Details browser icon to take action on the Notification. The browser icon can be seen at the bottom of your screen.



APPROVE, FORWARD, REJECT, DELEGATE, REQUEST INFO

- 10) In the upper and lower sections of the Notification Details screen there are six action buttons (see circled below).

Approval History

Who	Action	Date	Note
5 Hansmann, Jennifer C			
4 Whitt, Patricia B	Forward	18-MAR-2004	
3 Whitt, Patricia B	Submit	18-MAR-2004	
2 Whitt, Patricia B	Reserve	18-MAR-2004	
1 Whitt, Patricia B	Submit	18-MAR-2004	

References

Response

Forward To: [Text Field]

Note: [Text Area]

Return to Worklist

Display next notification after my response

Approve, Approve And Forward, Forward, Reject, Delegate, Request Information

- 11) Select the appropriate action button. Choices of actions available are: Approve, Approve and Forward, Forward, Reject, Delegate and Request Information.

Action Meanings

Approve - As far as my authority allows, I approve this requisition. Click Submit button.

Approve and Forward - As far as my authority allows, I approve this requisition. However, I would like further approval from the person to whom I am forwarding. Use the flashlight to select the name of the person to receive the notification. Search by Display Name using last name%. Select the person to populate the Forward to box. Click Submit button.

Forward - I am not approving this requisition without someone else seeing it. I am forwarding on. Use the flashlight to select the name of the person to receive the notification. Search by Display Name using last name%. Select the person to populate the Forward to box. Click Submit button.

Reject - I am not approving this requisition. I am sending it back to the originator for correction. Use the flashlight to select the name of the person to receive the notification. Search by Display Name using last name%. Select the person to populate the Forward to box. Click Submit button. You may type a message in the Note field explaining why you are rejecting. Click Submit button.

Delegate - I am delegating this notification to another person. This can be an FYI, To Do or Open Notification.

Request Information - I would like more information about this transaction.

Once the requisition has the final approval, it will route to Purchasing and they will create a Purchase Order.

For questions, please contact the Help Desk at 3-5555, option #2 or email memfis-help@uni.edu.

For questions about this document, please contact Pat Whitt, MEMFIS Trainer, at 3-6881.