

PROCUREMENT: Requisition Approval

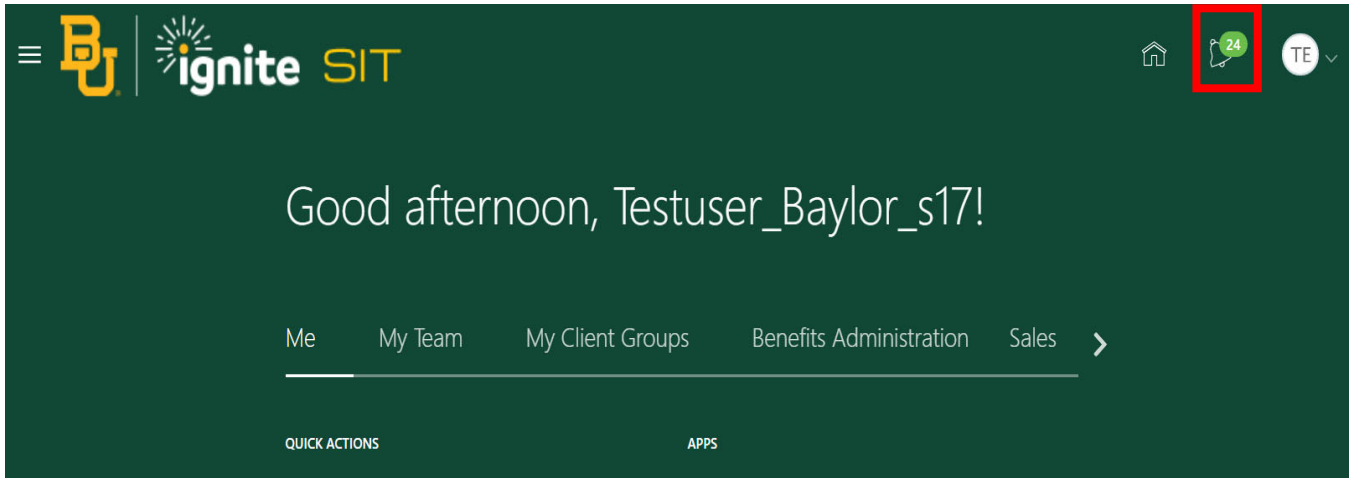
Overview

- This job aid is intended for all requisition approvers, as defined below:
 - If a requisition is under \$25,000 it will need to be approved by the Department Approver.
 - If a requisition is between \$25,000 and \$100,000 it will need to be approved by the Department Approver and the Division Approver.
 - If a requisition is over \$100,000 it will need to be approved by the Department Approver, Division Approver, and the University Approver.
- Approval criteria:
 - Is the purchase a good use of Baylor's funds?
 - Is the purchase in accordance with Baylor's policies?
 - Is a contract already in place for the requested goods and services?
 - Is the chart of accounts string entered correctly?
 - Is the delivery location correct?
 - Are additional reviews needed?
 - Are additional quotes or bids required for the purchase?

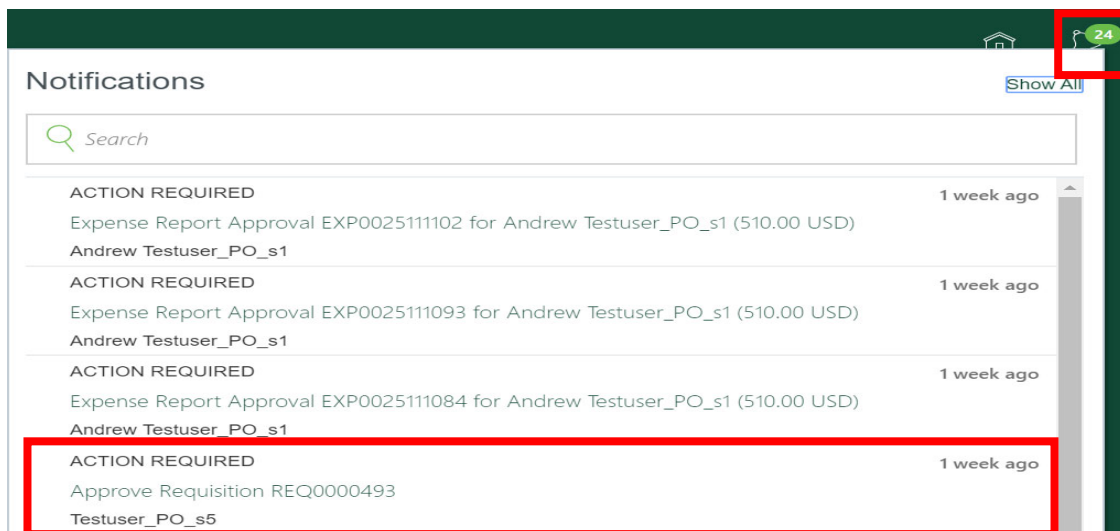
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I. Approving a Requisition via Ignite

1. Upon logging into your account, the **notification bell** icon will display new items that require your attention.



2. Click on the **notification bell** icon and select the **requisition** that is pending your approval.



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3. On the new page, review the requisition information. If all the information is correct and ready for approval, click **Approve**. See the overview page for what an approver should look for with each requisition.

Actions ▾ **Approve** **Reject**

Requisition Approval
\$107.04
Dr. Smith, Jane
Staplers from School of Business.

Requisition [REQ0000306](#)
Justification [Staplers needed.](#)

Lines

| | |
|---|----------|
| Staples Desktop Stapler, Full-Strip Capacity, Black (24547-CC) | \$107.04 |
| 16 x \$6.69 Charge Account: 500-50110-100-1000000-93800-220-0000-00000-00000 | |

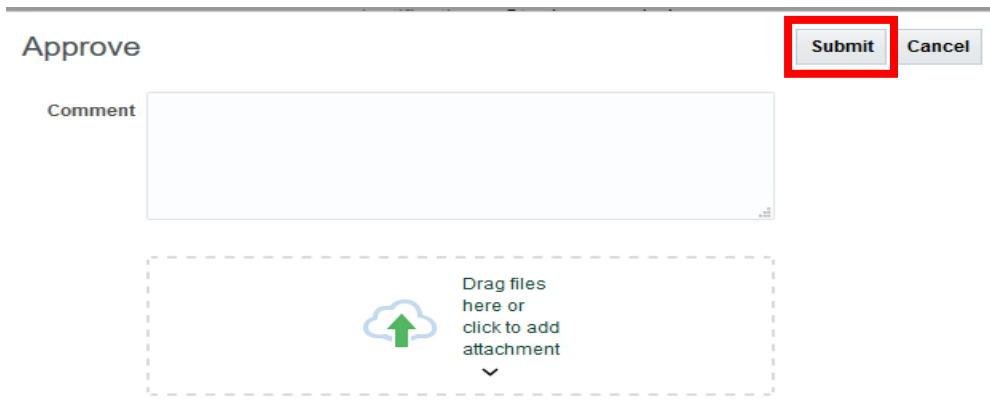
- a. The approver may also **Reject** or select the **Actions** dropdown for more options, if needed, on this page.
 - i. **Request Information:** Request additional information needed to decide whether to approve or reject
 - ii. **Delegate:** Pass the task to someone else to act on your behalf, but the task is still assigned to you
 - iii. **Reassign:** Reassign the task to someone you select
 - iv. **Route Task:** Add additional approvers to the requisition
 - v. **Add Comments:** Insert comments pertaining to the requisition
 - vi. **Add Attachment:** Add attachment pertaining to the requisition

Actions ▾ **Approve** **Reject**

- Request Information
- Delegate
- Reassign
- Route Task
- Add Comments
- Add Attachment

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- On the pop-up, the approver will add comments or attachments and click **Submit**.



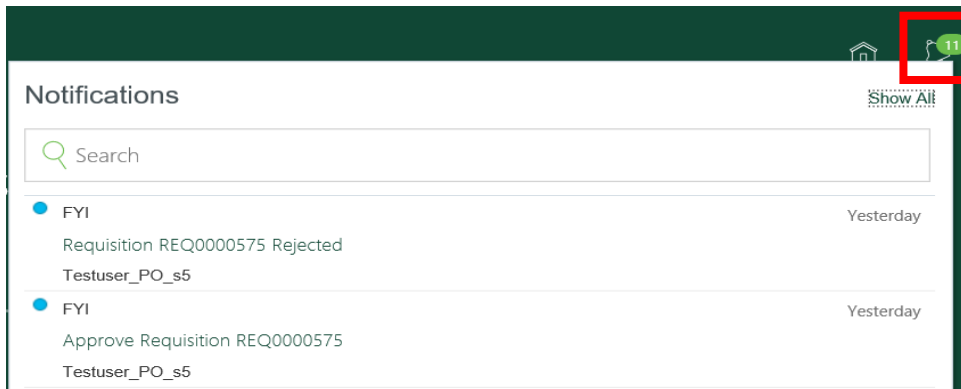
Approve

Submit Cancel

Comment

Drag files here or click to add attachment

- Notification results for requisition:
 - The *Shopper* will receive a notification on their **notification bell** icon once their purchase requisition has been acted upon by the approver. The notification will detail the status of the requisition, such as approved, rejected, or additional information requested.
 - If approved, the purchase requisition will then be sent to Procurement for purchase order creation and dispatch to the supplier.



Notifications

Show All

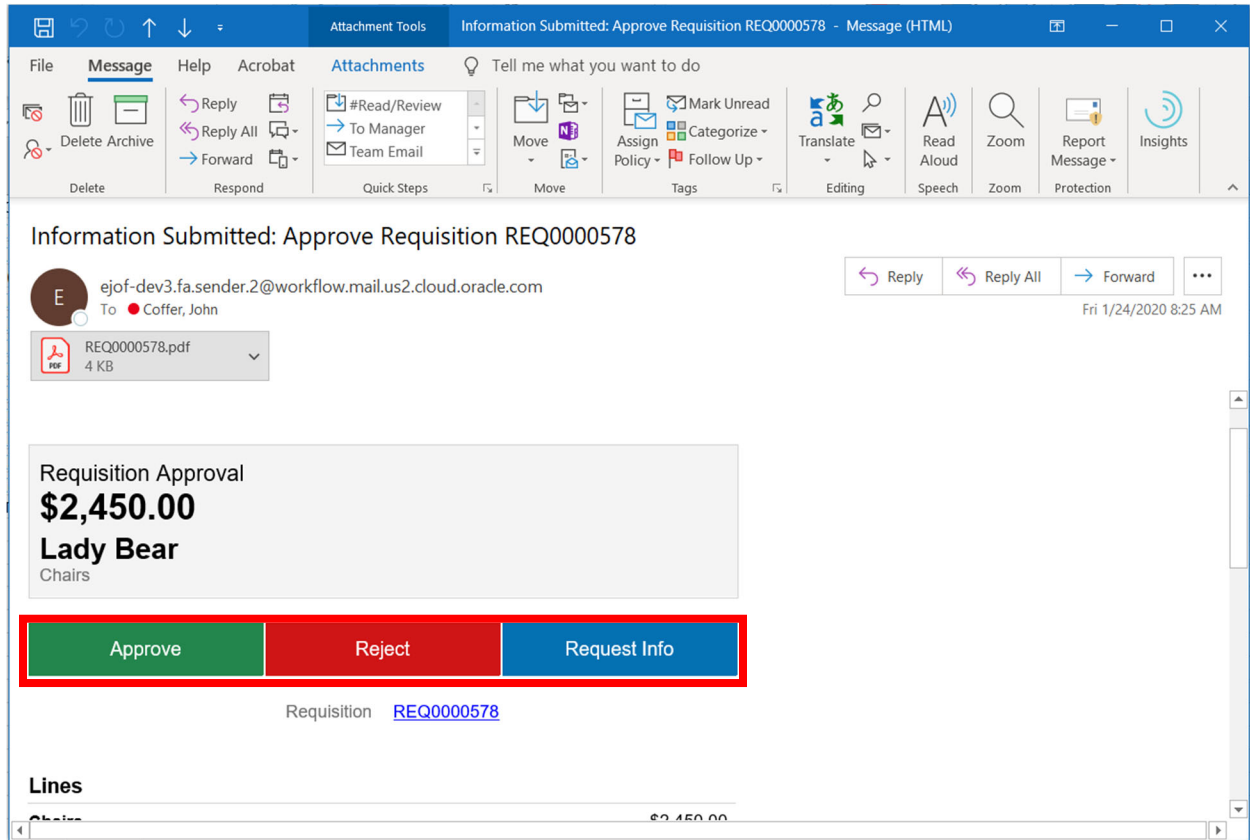
Search

| | | |
|-----|---|-----------|
| FYI | Requisition REQ0000575 Rejected Testuser_PO_s5 | Yesterday |
| FYI | Approve Requisition REQ0000575 Testuser_PO_s5 | Yesterday |

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2. Approving a Requisition via Email

1. Approvers can also approve requisitions through email. Approvers will receive an email stating a requisition requires their approval. The approver can **Approve**, **Reject**, or **Request Info** via the email notification.



The screenshot shows an email client window titled "Information Submitted: Approve Requisition REQ0000578 - Message (HTML)". The email is from "ejof-dev3.fa.sender.2@workflow.mail.us2.cloud.oracle.com" to "Coffer, John". It includes an attachment "REQ0000578.pdf" (4 KB). The main content of the email is a requisition approval notification for "Lady Bear Chairs" with a value of "\$2,450.00". Below the notification are three buttons: "Approve" (green), "Reject" (red), and "Request Info" (blue), which are highlighted with a red border. The email also includes a "Requisition" link to "REQ0000578" and a "Lines" table at the bottom.

| Lines | |
|--------|------------|
| Chairs | \$2,450.00 |