Approving a Requisition

Only Users with the authority to approve requisitions can access this window. The system allows Users to Approve/Disapprove individual items on the Requisition as well as approve the entire Requisition or return it to the Originator for additional editing or deletion. If you are the first approver, then the Account Codes <u>must</u> be completed prior to approving the Requisition.

1. **Retrieving the requisition**: From **Maintenance > Approve Requisition**, requisitions needing approval display one at a time. You may review and approve this way or retrieve a particular requisition by selecting the Directory button. Enter desired criteria in the top of the Directory box to find specific Requisitions, or leave all fields blank and click Search to see all Requisitions pending approval. Select the Requisition Number in blue you wish to review.

	Purchasing Vesen 32.8.4.6.011 User dar Hote 152.2.1.10 Benare 60:52
	Maintenance > Approve Requisition Section Section Section Timer 59 min and 33 sec
	Requisition Nor: 011422 Directory
	Vendor Notes Comments Uniform Act Distr Print Path Return Skip Approve Requision Number: 011422 Originator: 003422-Phylic Proven Requision: 00422-Phylic Proven Order For: Jackie Chain Requision Per: 07 Dare Requise: 0730-0019 Dare Requise: 0730-0019 Rescon: Met Shoad Sucolles: Beference Nor: 07
	Sort Key/Vendor Name QUILL COBODATION / QUIL B Shipping Adds: ADMINISTRATION - BUSINESS OFFICE - Bid Category C
	Credit Card Code Priority: R Regular * Work Order: Prieght Cost: 0.00 Distr Freight Ams Confirm Only: Attachments: Requisition Total: 119.91
Requisitions	
Req Number:	Requestor: Vendor Number: Contract Search
From Date:	To Date: Vendor Sort Key: Cancel
Req Nbr Date F	Requested Requestor Vendor Nbr Vendor Name Vendor Sort Key Priority Reason Status
011422 07-3 011423 07-3	30-2019 Phyllis Provan 00129 QUILL CORPORATION QUILL CORPORATION R - Regular High School Supplies P - Pending to be approv 31-2019 Phyllis Provan 00129 QUILL CORPORATION QUILL CORPORATION R - Regular P - Pending to be approv

2. **Reviewing the requisition**: Review each item on the Requisition. Consider the following:

• *Vendor Notes*: a paperclip icon on this button indicates a message has been included for the vendor. This message will be printed on the PO for the vendor's use. Click to review or edit.

TREIS	Purchasing Version : 3.4 Build: 0111 User: chan Host: 10.52.4.141 Browser: GC 75.0	
Maintenance >	Approve Requisition	SessionTimer: 57 min and 42 sec
Requisition N	br: 011422 Retrieve Directory	
U Vendor	rNotes Comments Uniform Acct Distr Print Path	Return Skip Approve

• *Comments*: a paperclip icon on this button indicates a message has been included for your review. Comments are internal only and typically will not be printed on the PO. Click to review or use to enter additional or responsive comments.

Note: We recommend using the Comments button to provide explanation any time you return a Requisition.

Purchasing Version : 3.4 Build: 0111 User: chan Host: 10.52.4.141 Browser: GC 75.0	
Maintenance inquiry Next rear Otlittles Reports Maintenance > Approve Requisition	SessionTimer: 53 min and 44 sec
Requisition Nbr: 011422 Retrieve Directory	
Uniform Acct Distr Print Path	Return Skip Approve
Requisition Comments This is for a special project for Seniors. Returned for additional quantity.	

• Note: A paperclip icon on this button indicates a message has been included specific to this item. Notes are internal only and will not be printed on the PO.

Delete	e Note	ltem	Catalog Nbr	Description	Quantity Unit of Issue		Unit Price	SubTotal		Commodity Code		
				Long Description	Status		Discount % D	Discount Amt	Freight Elig	Freight %	Freight Amt	Totals
	Note	001	123444	FILING FOLDERS	3.00 EA Each Each	•	28.99000	86.97				
	Accounts			Heavy-Duty Manila File Folde	Y - Approved		0.00%	0.00	V	0.00%	0.00	86.97
	0 Note	002	45678	SCISSORS	6.00 EA Each Each	•	5.49000	32.94				
	Accounts				Y - Approved		0.00%	0.00	 Image: A second s	0.00%	0.00	32.94

- *Coding*: Account codes must be assigned by the originator or 1st approver. If you need to assign account codes, consider the following options (Option 2 is recommended):
 - Option 1: After each item is entered, add an account line in the bottom section. For each line item there is an <u>Accounts button</u> under the Note beside the Long Description of each item in Section 2 (middle). Click on <u>Accounts button</u> to select the Item Row you will be working on.

Mair Mair	ntenance	Inquiry Next Ye	ar Utilities	Reports									
intenance > Approve	Requisition					2	SessionTimer: 58 r	min and 19 sec					
equisition Nbr: 0114	122	Retrieve	Directory										
Vendor Notes Requisition Number: Date Request: Sort Key/Vendor Nam Vendor Nbr:	© Comme 011422 07-30-2019 he: QUILL COR 00129	PORATION / QUIL	Acct Distr Originator: Date Required: Shipping Addr: Campus/Dept: Credit Card Code	Print 000422 - Phyllis I 07-30-2019 ADMINISTRATIO 001 - TEST HIGH IIIIGH	Path Provan N - BUSINESS OFFIC	Requestor: Reason: CE - Bid Catego Bid Nbr:	Return 000422 - Phyl High School S ry:	Skip lis Provan upplies	Approve Order For: Reference	Jackin Nbr:	e Chan	Requisitio	on Per: 07
Priority:	R Regular	-	Work Order:			Freight Co	st: 0.0	0 Distr Freight An	nt Confirm	n Only: 🔲	Attachments: 🔲	Requisitio	on Total: 119.
Delete Note	ltem C	atalog Nbr Descr	iption	Quantity	Unit of Issue			Unit Price	SubTotal	Co	ommodity Code		
New		Long	Description	0.00	Status		-	Discount % D	iscount Amt Fre	eight Elig	Freight % Freig	ht Amt Total	s
Note	001 12	S444 FILING	FOLDERS	3.00	EA Each Each	-	•	28.99000	86.97	_			00.07
Accounts		Heav	y-Duty Manila File Fo	06	Y - Approved	•	- 1	0.00%	0.00	•	0.00%	0.00	86.97
	002 45	5/8 SCISSO	KS	6.00	EA Each Each		' L	5.49000	32.94				

In section 3 at the bottom, begin typing the account code desired. Select the desired account code from the drop down. The Description will populate based on the account code selected.

Version 3.4 Build 0111 User thematic 15.2 A 4 Bill 0111 User thematic 15.2 A 4 Bill 0111
Maintenance Inguiry Next Year Utilities Reports
Maintenance > Approve Requisition Session Timer: 59 min and 55 sec
Requisition Nbr: 011422 Directory
Vendor Notes Comments Uniform Acct Distr Print Path Return Skip Approve Requisition Number: 011422 Originator: 000422 - Phyllis Provan Requestor: 000422 - Phyllis Provan Originator: 100422 - Phyllis Provan Requestor: 000422 - Phyllis Provan Originator: 100422 - Phyllis Provan Requestor: 000422 - Phyllis Provan Originator: 100422 - Phyllis Provan Requestor: 000422 - Phyllis Provan Reques
Origin Credit Card Code: Freight Cost: 0.00 Distr Freight Ams: Confirm Only: Attachments: Requisition Total: 119.91 Priority: R Regular • Work Order:
Accounts Handbrouchers 3.00 Pittam sam 25,9000 88,97 Accounts Hany-buty Manils File Flots V-Approved 0.00% 0.00 0.00% 0.00% 0.00 86,97 & Accounts Files/buty Manils File Flots V-Approved 0.00% 0.00 0.00% 0.00 86,97 & Accounts V-Approved 0.00% 0.00 80.00% 0.00%
Refresh Totals
Image: Second for Lem 201 Description Description <thdescription< th=""> <thdescription< th=""> <thdescription< td=""></thdescription<></thdescription<></thdescription<>

The balance in the Budget for the account code displays. (*Note: a negative amount means there is money in the budget. The attached screen shot is not showing a negative amount so this account is over by* \$46.15) Items may be charged to one or more account codes. Enter either the percent **or** amount of the item to be charged to that account code. Add additional account code lines as desired.

Maintenance Inquiry Next	ost: 10.52.4.141 Browser: GC 75.0 Year Utilities Reports	
tenance > Approve Requisition		SessionTimer: 59 min and 23 sec
uisition Nbr: 011422 skipped		
uisition Nbr: 011423 Retrieve	Directory	
/endor Notes Comments Uniform A	cct Distr Print Path	Return Skip Approve
equisition Number: 011423	Originator: 000422 - Phyllis Provan	Requestor: 000422 - Phyllis Provan Order For: Jackie Chan Requisition Per: 07
ste Request: 07-31-2019	Date Required: 07-31-2019	Reason: Reference Nbr:
ort Key/Vendor Name: OUILL CORPORATION / OUIL	Shipping Addr: ADMINISTRATION - BUSIN	INFSS OFFICE - Bid Category
andor Nbr: 00129	Campus/Dept: 001 - TEST HIGH	Bid Nbr:
	Credit Card Code:	
iority: R Regular 🔻	Work Order:	Freight Cost: 0.00 Distr Freight Amt Confirm Only: Attachments: Requisition Total: 24
elete Note Item Catalog Nbr Desc	cription Quantity Unit of I	f Issue Unit Price SubTotal Commodity Code
Note 001 Legal	Pads 2.00 EA Each E	n Each 12.49000 24.98
Accounts	Y - App	pproved 🔻 0.00% 0.00 ᢞ 0.00% 0.00 24.98
efresh Totals		
ccounts for item 001 elete Account Code Descripti	ion Balance Amt	Pct Amount
199-11-6399.00-001-911000 🔤 GEN SUP	PLIES -HS REG ED 46.15 100.000	0% 24.98
	100.000	00% 24.98

Once the account information has been entered, click on the **Refresh Totals** link to get totals in both percent and amount and to verify 100% of the line has been expensed.

Accoun	its for item 001				
Delete	Account Code	Description	Balance Amt	Pct	Amount
Ŵ	199-11-6399.00-001-911000	GEN SUPPLIES -HS REG ED	46.15	100.000%	24.98
				100.000%	24.98
<u> </u>					
Refresh	Totals Calculate Percent Calcu	ulate Amount			+ <u>Add</u>

Important Note: This option is line item driven, so the account information being entered will tie solely to the item whose <u>Accounts button</u> was selected in Section 2.

• *Option 2* (**Recommended**): Option 2 is much simpler as it will distribute costs uniformly across all items based on the percent or amount indicated. After entering all items and before you enter any account codes in the

bottom section, select the **Uniform Account Distribution** button at the top of the screen.

	Pur	Chasing Version : 3.4 Bui User: bogart Ho	ld: 0111 st: 10.52.4.141 Browser: GC	: 75.0 Decement						
N	laintenance > Approve Re	quisition	ear Oundes	Reports	See	sionTimer: 51 min and 57 sec				
	Requisition Nbr: 011422	skipped								
	Requisition Nbr: 01142	3 Retrieve	Directory							
	Vendor Notes	Comments Uniform Ac	ct Distr Pri	nt Path	Retu	rn Skip A	pprove			
	Requisition Number:	011423	Originator:	000422 - Phyllis Provan	Requestor:	000422 - Phyllis Provan	Order For:	Jackie Chan	Requisition Per:	07
	Date Request:	07-31-2019	Date Required:	07-31-2019	Reason:		Reference Nbr:			
	Sort Key/Vendor Name Vendor Nbr:	QUILL CORPORATION / QUIL	Shipping Addr: Campus/Dept:	ADMINISTRATION - BUSINESS OFFICE - 001 - TEST HIGH	Bid Category: Bid Nbr:					
			Credit Card Code:]					
	Priority:	R Regular 🔻	Work Order:		Freight Cost:	0.00 Distr Freight Amt	Confirm Only:	Attachments:	Requisition Total:	24.98

A pop-up box will display in which you will enter the account code for the entire requisition.

Uniform A	account Distribution				2
Delete	Account Code	Description	Balance Amt	Pct	Amount
1	199-11-6399.00-001-911000	GEN SUPPLIES -HS	REGED 46.15	0.000%	0.00
				0.000%	0.00
Refresh	Totais Calculate Percent Calculate Amo	unt			+ Add
					OK Cancel



A list of account codes matching your search components is displayed. Select the desired account code from the list. Otherwise, click **Cancel** to close the Account Codes lookup.

Account Codes		×
Fund Func Obj Sobj	Org X Image: X X Image: X X Image: X X Image: X Search Cancel	
ID	Description	_
<u>199-11-6399.00-001-911000</u>	GEN SUPPLIES -HS REG ED	
<u>199-11-6399.00-001-921000</u>	GEN SUPPLIES - G/T	
199-11-6399.00-001-923000	GEN SUPPLIES - SP ED	
199-11-6399.00-001-924000	GEN SUPPLIES - COMP	
<u>199-11-6399.00-001-931000</u>	HIGH SCHOOL ALLOTMENT	
199-11-6399.00-041-911000	GEN SUPPLIES	
199-11-6399.00-101-911000	GEN SUPPLIES - ELEM REG ED	
199-11-6399.00-101-921000	GEN SUPPLIES - G/T	
<u>199-11-6399.00-101-923000</u>	GEN SUPPLIES - SP ED	
199-11-6399.00-101-930000	GEN SUPPLIES- COMP	
199-11-6399.01-101-923000	ADDITIONAL SP ED SUPPLIES	
<u>199-11-6399.09-001-911000</u>	GEN SUPPLIES - BAND	
199-11-6399.13-001-922000	GEN SUPPLIES- VOC AG	
<u>199-11-6399.17-001-922000</u>	GEN SUPPLIES-VOC BUSINESS	-

You are able to enter the account code or click the elipses button just as in option #1, you will see the balance for the account and you must assign the percent or amount of the entire requisition you want charged to that account. Add additional account codes as desired.

velete	Account Code	Description	Balance Amt	Pct	Amoun
199-	11-6399.00-001-911000	GEN SUPPLIES -HS	8 REG ED 46.15	0.000%	0.00
				0.000%	0.00
	Online the Descent Online to A				
Refresh Totals	: <u>Calculate Percent</u> <u>Calculate Ar</u>	nount			+ <u>Ada</u>
Refresh Totak	Calculate Percent Calculate An	nount			+ <u>Ad</u>

Once all accounts codes have been entered, select the Calculate Percent or Calculate Amount link. (If you entered by amount, calculate the percent; If by percent, calculate amount.) Your percent must equal 100% and the amount must equal the total for the requisition. Once it does, click OK.

Uniform Account Distribution							
Delete	Account Code		Description	Balance Amt	Pct	Amount	
Ŵ	199-11-6399.00-001-911000	•••	GEN SUPPLIES -HS REG ED	46.15	50.000%	12.49	
Ŵ	199-11-6399.00-001-921000	•••	GEN SUPPLIES - G/T	10.12	50.000%	12.49	
					100.000%	24.98	
Refresh	<u>Totals Calculate Percent Calculate Amoun</u>	t				+ <u>Add</u>	
						OK Cancel	

Important Note: Unless expressly allowed, TxEIS will not allow a requisition to be approved if the purchase will exceed the budget for that account code. Instead, a message will display indicating the total encumbrance amounts are greater than budget amount for the account code. If this is the account that you want to use, you will need to contact the Business Office. If the items no longer will be ordered because of lack of money, then RETURN the requisition. If arrangements are made with the Business Office, then the approval process can continue.

Vertion : 3.4 Rule	14-0111					
Purchasing User: pprovan H	ost: 10.52.4.141 Browser: GC 75.0					
Maintenance Inquiry Next Y	ear Utilities Reports					
Maintenance > Create/Modify Requisition			SessionTimer: 59 min and 3	39 sec		
Save Delete						
The surrent requisition amount is greater than the m	ay limit for for the Pequester					
the current requisition amount is greater than the m	ax mile for for the kequestor.					
Requisition Nbr: 011424 Retrieve	Directory					
Add - Clear All Add - Clear Vendor	Add - Clear Detail Vendor Notes	Comments Uniform Ac	ct Distr Print	Submit		
Requisition Number: 011424	Originator 000422 - Phyllip R	Requestor:	000422 - Phyllis Provan	Order For: BAt	ND DIRECTOR Requisition Per	07
Date Pennest: 07-31-2019	Date Required: 07-31-2019	Peacon		Reference Nikri	Requisitor Per.	
bate negacia	bate nequired.	100001.		Reference Nor.		
Sort Key/Vendor Name: WAL-MART STORE #01-0535	Shipping Addr: ADMINISTRATION	- BUSINESS OFFICE - Bid Category				
Vendor Nbr: 00710 ···	Campus/Dept: 001 - TEST HIGH	Bid Nbr:				
	Credit Card Code:					
						10.00
R Regular	Work Urder:	Freight Cost:	0.00 Distr Freight An	t Confirm Unly:	Attachments:	10.00
Delete Note Item Catalog Nbr Desc	ription Quantity	Unit of Issue	Unit Price	SubTotal	Commodity Code	
Long	Description 1.00	Status	Discount % Di	scount Amt Freight Elig	Freight % Freight Amt Totals	
Accounts	TROCEREEFE	X - Approved T	0.00%	0.00	0.00% 0.00 100.00	
		1 - Approved -	0.00%	0.00	0.001	
Refresh Totals					+ <u>Add</u>	
Accounts for item 001						
Delete Account Code Description	n Balance Amt	Pct Amount				
W 199-11-6399.00-001-911000 GEN SUPF	LIES -HS REG ED 21.17	100.000% 100.00				
		100.000% 100.00				
Refresh Totals Calculate Percent Calculate Amount		+ <u>Add</u>				

_3. Approving or Returning the requisition.

To Approve: Click the Approve button to send the requisition to the next approver. You will see a message saying "Submission for approval completed". If you are the final approver, then the message will say a PO number has been assigned.

To Return: Select the Return button to disapprove the Requisition. This will return it to the Originator for editing or deleting. We recommend using the Comments button to tell the Originator why you are returning the Requisition. The Originator can then delete the requisition or make changes and re-submit for approval.

To Skip: Select Skip to skip the current Requisition and move to the next.

-	Version: 3.4 Build: 0111 User: bogert Hott: 10.52.4.141 Browser: GC 75.0 Maintenance Inquiry Next Year Utilities							
Maintenance > Approve Requisition SessionTimer: 59 min and 26 sec								
Requisition Nbr: 011422 Directory								
Vendor Note	S Comments Uniform Acct Distr Print Path	Return Skip Approve						

Path: Clicking this button displays the approval path and allows the Approver to Insert and/or Add an Approver in the path for this Requisition. Click to view the approval path for the requisition. The Approval Path window is displayed.

- Under **Insert Approver**: In the **Approver** field, click I to select an approver name to insert before or after your name.
- Select **Before** or **After** to indicate if you want the approver's name to be inserted before or after your name in the approval path.
- If an approver is inserted before you, the requisition is available to the new approver. Once the new approver approves the requisition, the requisition is available for your approval.
- If an approver is added after you, you can add additional approvers in the requisition flow or add an approver at the end of the approval process.

Click **OK** to accept the changes.

Click **Cancel** to close the window without saving the changes.

	Approval Path					×
	Approver	Title	Alternate Approver	Approval Status	Approved Date	Print Name
BUSINE:	Phyllis Provan	undefined		Submitted	07-31-2019	
	JACKIE CHAN	HIGH SCHOOL PRINCIPAL		Approved	08-01-2019	
	HUMPHREY BOGART	SUPERINTENDENT		Pending		\$
	Phyllis Provan	undefined		Pending		
hit of Is:						
atus						
Each Ea						
- Appr						
Each Ea						
1000						
- Appr						
	Insert Approver					
	Before		_			
	After Approv	ver: SANDRA BULLOCK				
Pc					ок	Cancel