

## Approving Electronic Requisitions

Once a requisition is entered, it must be approved before the Purchasing Department creates purchase orders on behalf of the campus. Requisitions may be entered for any amount; however, the approver must have the appropriate Delegation of Authority level for the requisition to be processed.

Use this guide to view the line, schedule and distribution information for each requisition using a query. Then search and find, and approve the requisition. If modifications are required, submit changes to the requestor. Requisitions can be edited any time prior to Approval.

**Navigation:** Purchasing > Reporting Tools > Query > Query Viewer

- 1) In the Search By field/box, select Query Name.
  - a) In the begins with field/box, type “**LB%PO\_003D**”.
- 2) Click “**Search**”.
- 3) Optional: Click Favorite to add to your list of favorites so you will not need to search for the query in future.
- 4) Select “**HTML**” on the right of the table to run the query to a new window.
- 5) Ensure the Business Unit field is populated with “**LBCMP**”
- 6) Next to the Requestor field/box, select the magnifying glass. Select the Requestor ID (40 + 9 digit campus ID). Optional: you may type the entire ID if known to get immediate results.
- 7) Select the “**View Results**” button.
  - a) All requisitions and lines within the requisition will be displayed with the associated chartfields and the total amount for the requisition.
- 8) Review and then minimize or close the results window.

**Navigation:** Purchasing > Requisition > Maintain Requisitions

- 1) Select the tab labeled “**Find an Existing Value**”.
- 2) In the Requisition ID field/box, type in the entire “**Requisition ID**”
  - a) Alternative 1: Type in the last five digits of the requisition number preceded by a %.  
(Example: %17982)
  - b) Alternative 2: Select contains from the drop-down value list and then type in the requisition number.

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- c) Alternative 3: Do not populate the Requisition ID and choose from all requisitions.
- 3) Select “**Search**”.
- 4) Open the appropriate requisition.
- 5) Verify the accounting date is within the same month as the date the requisition is being approved. If not, change the accounting date to the current date.
- 6) Select the **green checkmark** to Approve the requisition.
- 7) Select “**Save**”.



Requisition will process over night and the Budget Status will change from Not Chk'd to Valid and will be available to Purchasing for Buyer Assignment the following day.