

One Council

Quick Reference Guide

SUPPLY CHAIN

Requisition Approvals



Need help? Ask for your friendly Change Champion

Overview

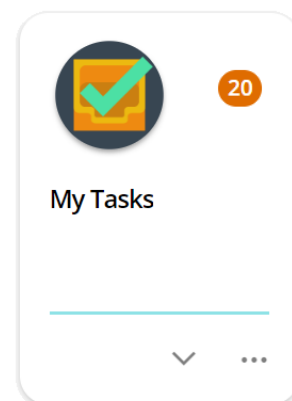
A notification and email are sent to advise a new requisition is submitted for approval. This guide will show how to approve, reject, reassign or cancel a requisition.

If a requisition is approved:

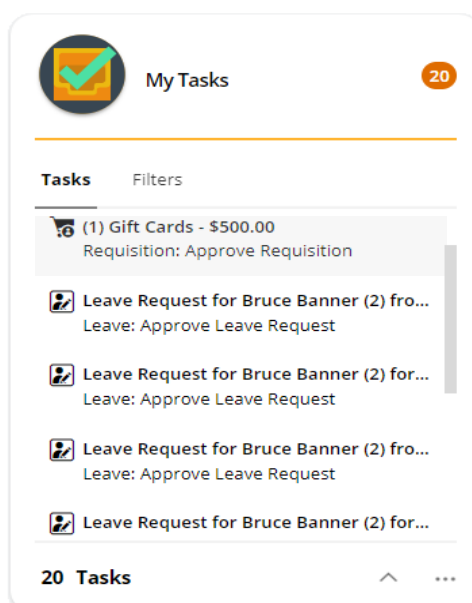
- a purchase order is automatically generated
- the person who raised the requisition receives an email notification, and
- will need to transmit the purchase order to the supplier.

Launch My Tasks

- Launch function or
 - Expand ∨ (click down arrow) to see notifications
 - Scroll and select requisition to action



- Click on the **Requisition**



③ My Tasks launches with the specific requisition selected:

The screenshot shows the 'My Tasks' interface. On the left, a list of tasks is displayed under the heading 'Assigned to me (19)'. The first task is '(1) Gift Cards - \$500.00' with a due date of 'TODAY'. Below it are several 'Leave Request for Bruce Banner (2)' tasks with due dates of 'YESTERDAY' and 'WEDNESDAY', and a 'Timesheet for Bruce Banner (2) ending 12-Jun-2022' due 'TUESDAY'. On the right, the detailed view for the 'Gift Cards' requisition is shown. It includes a 'Summary' section with 'Task Description: Approve Requisition', 'Assigned to: Peter Parker', and 'Received: 17-Jun-2022 13:30:19'. A 'Latest Comment' states: 'Created as part of a re-start: Recalled by user. (Bruce Banner, 17-Jun-2022 13:30:11)'. The 'Requisition' section shows 'Requisition Type: Purchase Requisition', 'Requisition Date: 16-Jun-2022', 'Date Required: 16-Jun-2022', 'Priority: Normal', and 'Purchasing Location: Zone Youth Centre'. At the bottom, there are 'Approve' and 'Refresh' buttons.

④ Select the Action menu:

- Open Requisition

The screenshot shows the 'Action' menu for a requisition. At the top right, there are 'Approve' and 'Refresh' buttons. The menu itself is a white box with a dark border, containing the following options: 'Reject', 'Approve and Print', 'Approve and Background Print', 'Reassign Requisition', 'Cancel Requisition', and 'Open Requisition'. The 'Open Requisition' option is highlighted at the bottom of the menu.

The Requisition launches

The screenshot shows the 'Requisition' interface. At the top, it says 'Woolworths Group Open Pay - ABN:88000014675 (RQ00000384)'. Below this, there is a 'Requested Items' section with one item: 'Gift Cards' with a quantity of 10.00 and a unit amount of 5.00, totaling 50.00. The requisition is marked as 'UNAPPROVED'. On the right, there is a 'REQUISITION' summary table with columns for 'Reference', 'Issued', 'Required', and 'Requisition User'. The 'Additional Details' section at the bottom lists various criteria and their status, such as 'Number of quotes attached: 0', 'Evaluation report attached: 0', 'Memorandum to CEO or Council: Report Attached?', 'Formal Request for Tender: Formal Request for Tender process conducted?', 'How many pre-qualified Tender: 0', 'Change Suppliers used?', 'Alternative Address Line 1', 'Alternative Address Line 2', and 'Alternative City'.

⑤ Review the **requisition**

- The correct supplier is selected

Gift Cards GOODS

Woolworths Group Open Pay | GC100 50.00

Quantity: 10.00 Unit Amount (Inclusive): 5.00

REQUIRED 16-JUN-2022 NA

45.45 (Ex) ONLY

1 DISSECTION

PURCHASE View

- Costings amount, ledger, accounts and GST are correct

Costing Summary

Costing Summary Cost Accounts

1 - 1 of 1 record.

Ledger	Account	Account Description	Amount (Exclusive)	Amount (Inclusive)
PJ	100001-1101-1001-16005	Administration, Fin - Govern, Def Activity, Office Equip -	45.45	50.00

- Ensure the quote is attached and valid for expected dates

Attachments
0 Attachments

⑥ Do one of the following:

- **Approve** or return to **My Tasks**
- Select the **Action menu** to
- Reject
- Reassign Requisition
- Cancel Requisition



The following options are reserved for the person who raised the requisition:

- Approve and Print
- Approve and Background Print

Approve

- Reject
- Approve and Print
- Approve and Background Print
- Reassign Requisition
- Cancel Requisition
- Open Requisition

Approve

- ① Select **Approve**
A notification message displays confirming the requisition is approved.
- ② The task is removed from the queue

Reject

- ① Select **Reject** (from the action menu)
Select **Reject**
 - a) Add Comments
 - b) Select **OK**
- ② The task is removed from the queue and the staff member will receive a notification.

Reject

This will complete the current task Approve Requisition. The next task is: Review Rejected

Comments

OK Cancel

Reassign Requisition

Send the requisition to another approver to review and make the decision

- ① Select **Reassign Requisition** (from the action menu)
 - a) Assign to: Select an approver
 - b) Add **Comments**
 - c) Select **OK**
- ② The task is removed from the queue

Reassign Requisition

This will assign the current task Approve Requisition to the user nominated.

Assign To *
JILL.PLANT (Jill Plant)

Comments

OK Cancel

Cancel

- ① Select **Cancel**
(from the action menu)
 - a) Add **Comments**
 - d) Select **OK**
- ② The task is removed from the queue

Cancel Requisition

This will cancel the current task Approve Requisition.

Comments

