

eShop How-To Sheets

Reviewing and Actioning Pending Requisitions

This how-to sheet outlines the steps required for approvers:

- To review and action (e.g. approve) pending requisitions
- To assign pending requisitions to yourself (see step 3) so you can also edit, reject or return requisitions

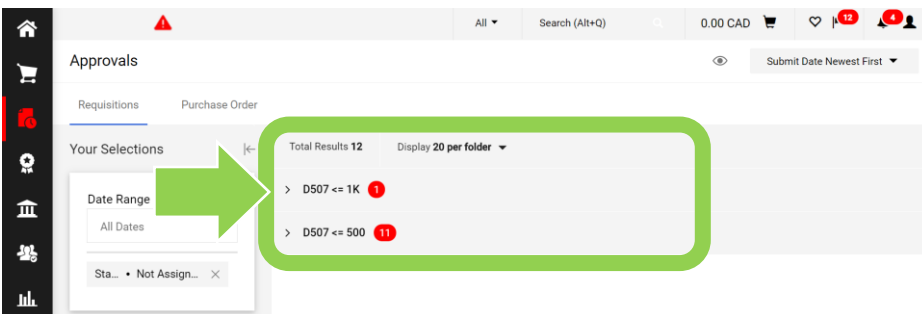
What changes can an approver make to a requisition?

- The index (i.e. funding source) (see step 5)
- Quantity of goods. While approvers can edit the quantity, Procurement Services recommends that you return the requisition to the requisitioner (i.e. to the person who created it) to edit the quantity.

THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

1. We recommend that approvers action their pending approvals on a regular basis.

On the 'Approvals' page, pending approvals are organized into collapsed buckets based the index (i.e. the funding source) and the amount of the requisition.

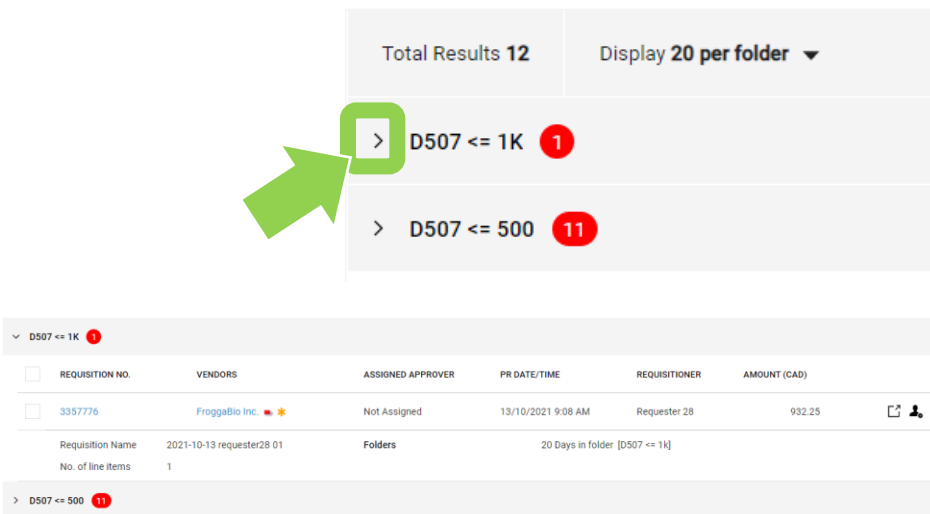


2. Click on an arrow to expand a collapsed bucket.

Tip: If you expand buckets, they will stay that way until you collapse them.

Specific requisitions in a given bucket will be listed.

Tip: If another approver has assigned a requisition to themselves, it will not appear in any of the buckets.



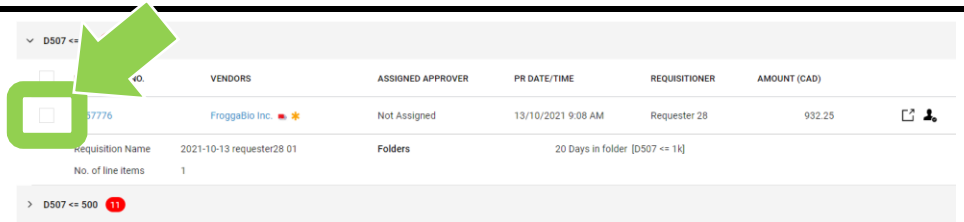
3a. Assigning a Requisition to Yourself

If there are multiple approvers for a given requisition, all approvers will receive a notification email.

To ensure that you are the approver for a particular requisition, you must assign it to yourself.

Assigning the requisition to yourself also allows you to make changes to the requisition (see step 5), return a requisition (see step 9) and reject a requisition (see step 8).

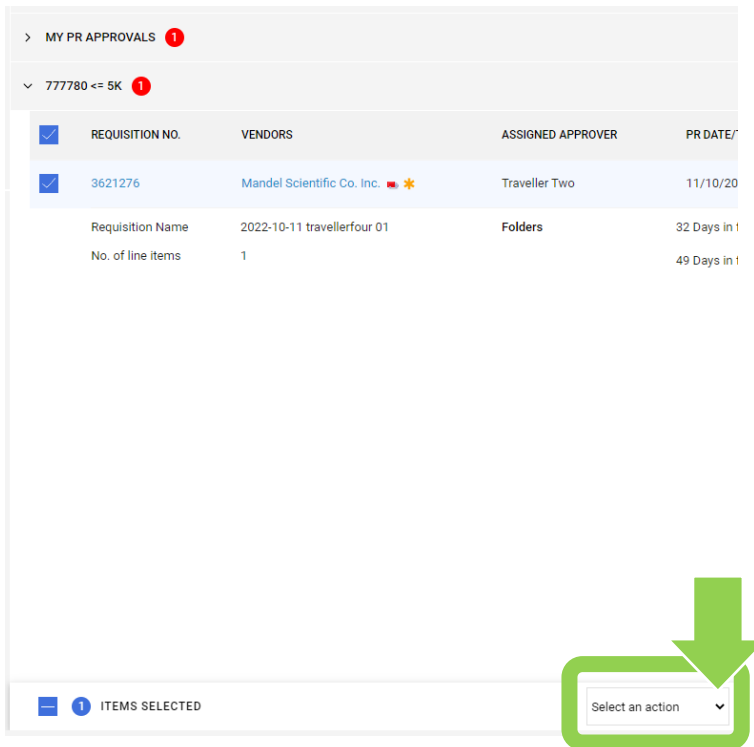
To assign a requisition to yourself, click on the box at the end of a given row.



	VENDORS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT (CAD)	
7776	FroggaBio Inc. *	Not Assigned	13/10/2021 9:08 AM	Requester 28	932.25	
Requisition Name		2021-10-13 requester28 01		Folders		20 Days in folder [D507 <= 1K]
No. of line items		1				

3b. Assigning a Requisition to Yourself

Click on the arrow beside 'Select an action' to find other options.



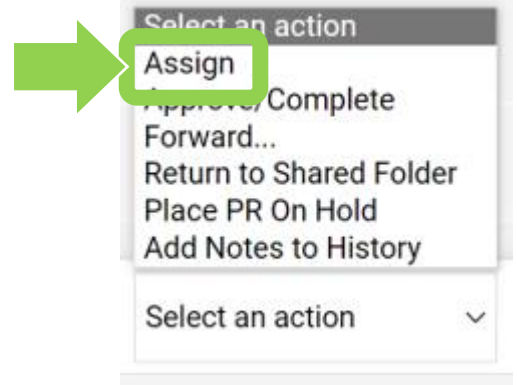
REQUISITION NO.	VENDORS	ASSIGNED APPROVER	PR DATE/TIME				
3621276	Mandel Scientific Co. Inc. *	Traveller Two	11/10/20				
Requisition Name		2022-10-11 travellerfour 01		Folders	32 Days in 1		
No. of line items		1					49 Days in 1

1 ITEMS SELECTED

Select an action

3c. Assigning a Requisition to Yourself

In the window that opens, click on 'Assign'.

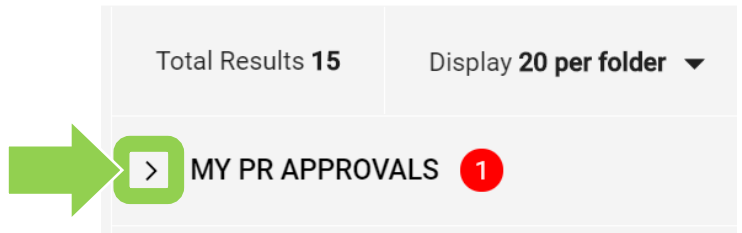


3d. Assigning a Requisition to Yourself

The requisition will now appear in a new bucket called 'MY PR APPROVALS'.

Click on the arrow to view the requisition.

Tip: Once you have assigned a requisition to yourself, it will disappear from other approvers' lists.



4. Reviewing a Requisition ...

Once you've expanded a folder, click on a blue requisition number to view the details (e.g. quantity, total cost, and index).

REQUISITION NO.	VENDORS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	AMOUNT (CAD)	
3357776	FroggaBio Inc. *	Abby Approver	13/10/2021 9:08 AM	Requester 28	932.25	🔗 ✓

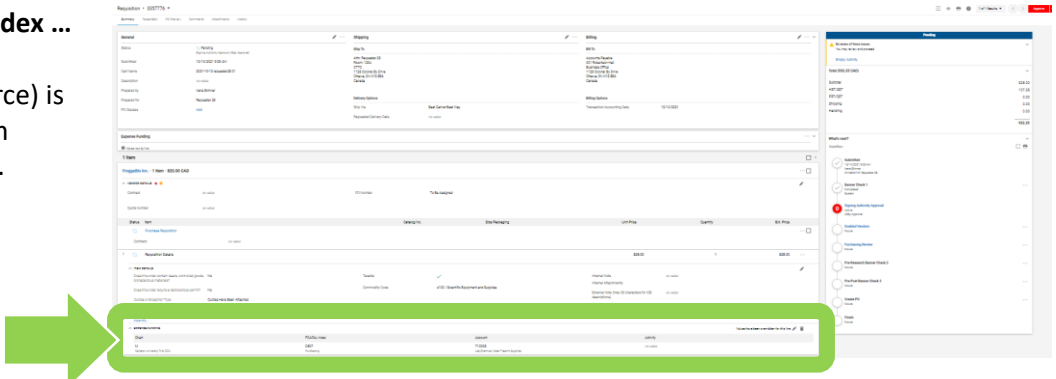
Below the table, there is a summary section:

Requisition Name	2021-10-13 requester28 01	Folders	0 Days in folder [My PR Approvals]
No. of line items	1		20 Days in folder [D507 <= 1K]

A green arrow points to the requisition number "3357776" in the table.

5a. **Reviewing & Editing the Index ...**

The index (i.e. funding source) is identified for each line item under 'EXPENSE FUNDING'.



(larger image of expense funding)

To edit the index, click on the pencil icon.

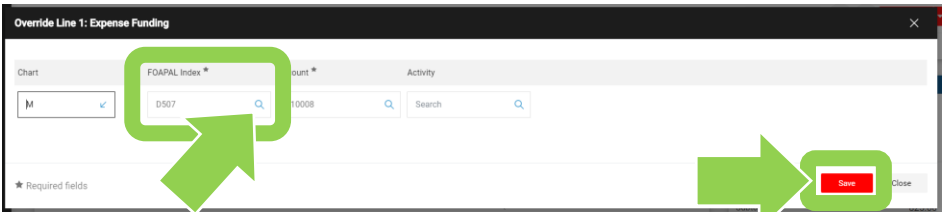
Chart	FOAPAL Index	Account	Activity
M Carleton University Trial COA	D507 Purchasing	710008 Lab,Chemical,Water Treatmt Supplies	no value

5b. **Reviewing & Editing the Index ...**

From the 'Override' window, you can change the 'FOAPAL Index*' by typing in a new index or clicking on the magnifying glass icon to view a list of the indexes that you have access to.

The 'Account*' and 'Activity' fields can also be edited.

If you make any changes, remember to click on the red 'Save' button.



6. Editing the Quantity ...

While approvers can edit quantities (i.e. for goods), Procurement Services recommends that you send the requisition back to the requisitioner (i.e. the person who created it) to edit the quantities.

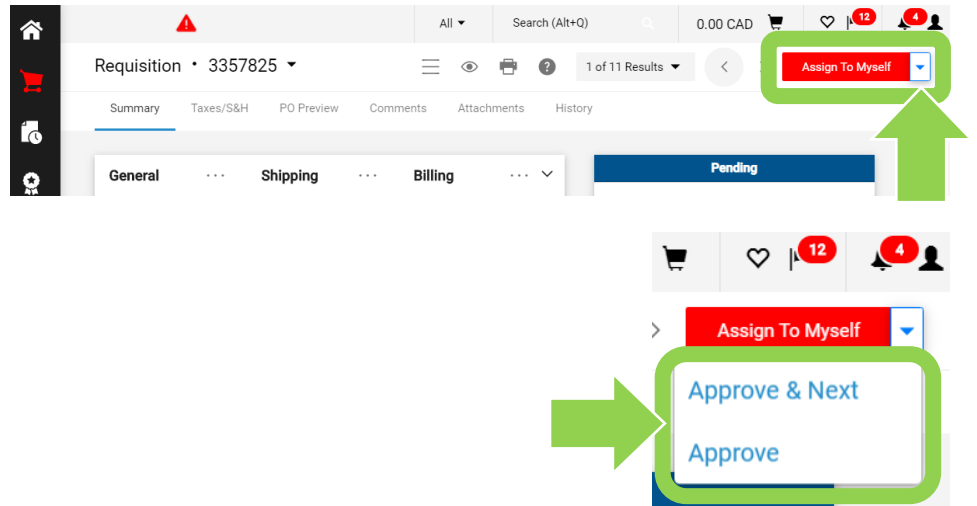
Contact eshop@carleton.ca with any questions.

7. Approving a Requisition ...

If you HAVE NOT assigned the requisition to yourself, click on the arrow beside the red 'Assign to Myself' button.

To approve the requisition, click on the blue 'Approve' text.

Click on 'Approve & Next' to approve the requisition and open the next requisition in your list.

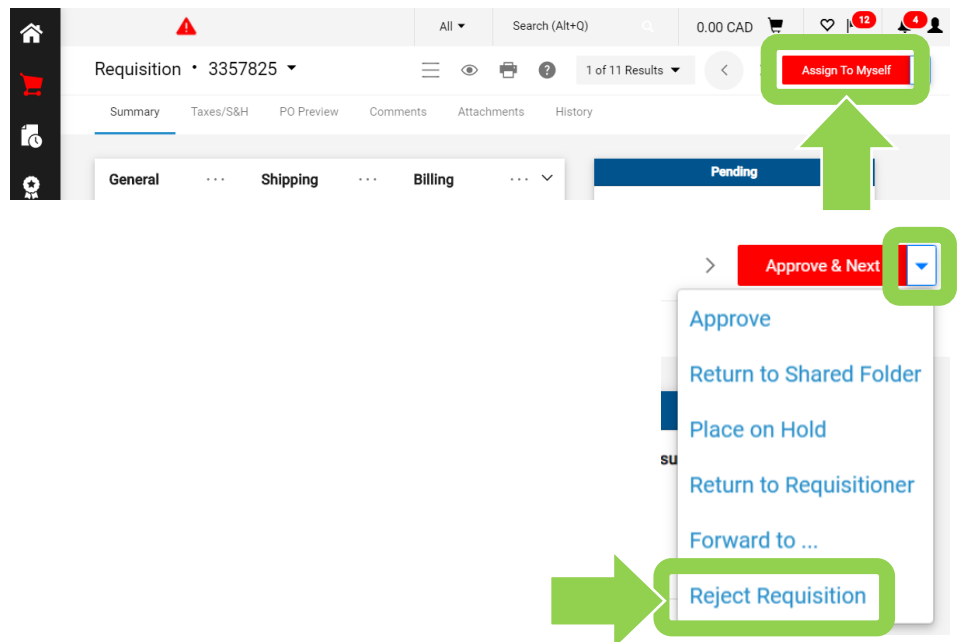


8a. Rejecting a Requisition ...

If you HAVE NOT assigned the requisition to yourself, click on the red 'Assign to Myself' button.

The button will change to either 'Approve' or 'Approve and Next'. Click on the blue arrow beside this button to view options.

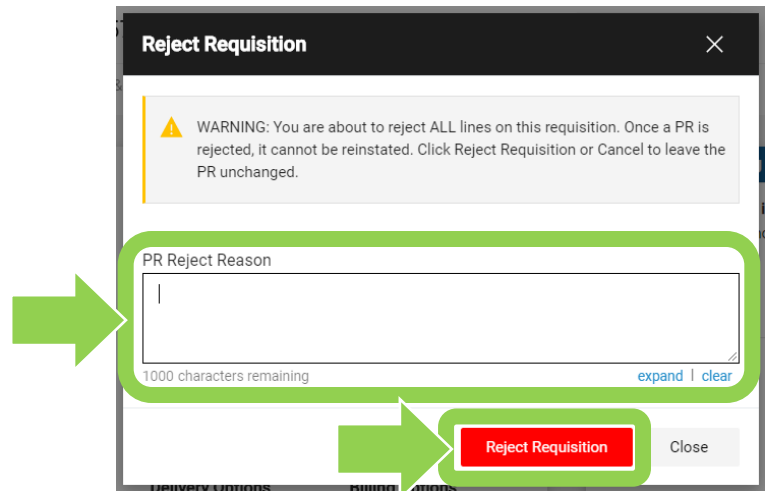
In the window that opens, click on the 'Reject Requisition' button.



8b. Rejecting a requisition ...

You will be prompted to enter the reason you've rejected the requisition in the 'PR Rejected Reason' field. The requisitioner (i.e. the person who submitted the requisition) will see this.

Click on the red 'Reject Requisition' button.

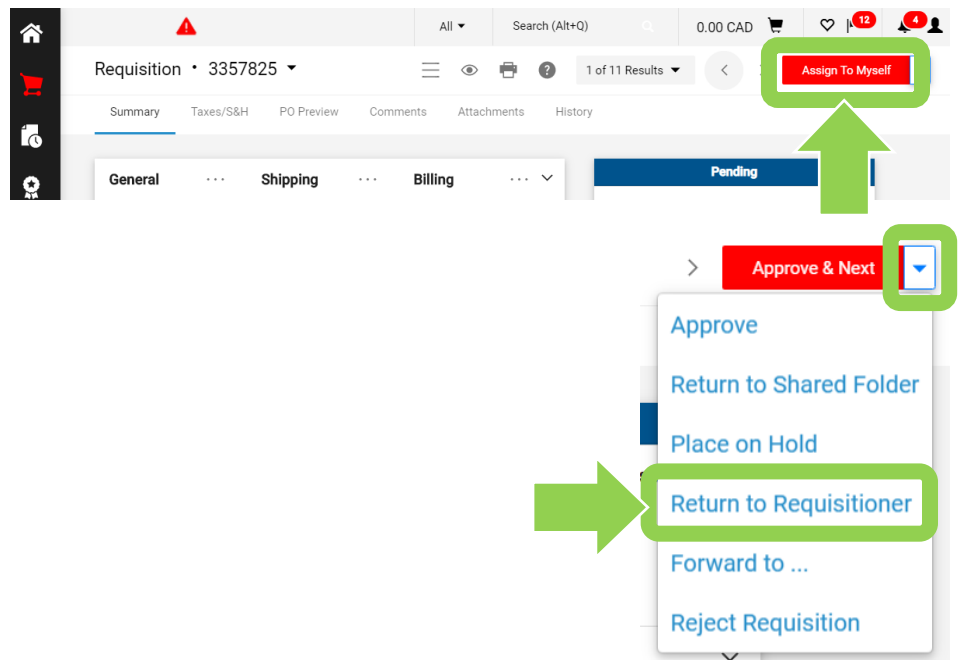


9a. Returning a Requisition

If you HAVE NOT assigned the requisition to yourself, click on the red 'Assign to Myself' button.

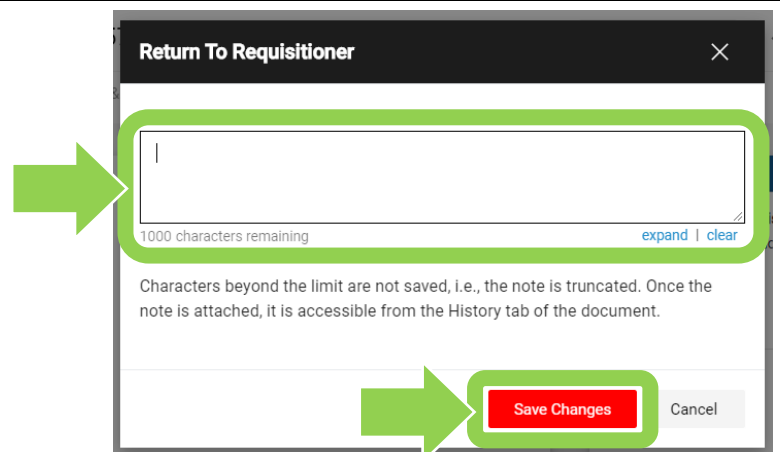
The button will change to either 'Approve' or 'Approve and Next'. Click on the blue arrow beside this button to view the options.

In the window that opens, click on the 'Return to Requisitioner' button.



9b. You will be prompted to enter the reason you are returning the requisition in the 'Return to Requisitioner' field. Use this field to tell the requisitioner why the requisition was not approved (e.g. what needs to be fixed).

Click on the red 'Save Changes' button.



What next?

- Visit carleton.ca/facts/eshop to find more how-to sheets.
 - Questions about the system? Email eshop@carleton.ca or call 613-520-2600 ext.3311.
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