Tulane University
SciQuest

Module 4: Approval of a Requisition
Training User Guides
### 4.0 Researching the Workflow Status of Requisitions

**Target Audience: Shopper/Requester**

SciQuest provides a visual representation of the workflow or approval process for a purchase requisition. Each step in the process is represented by a box, along with a description.


2. Requisitions can be searched via Requisition Name and/or Requisition Number and can be filtered by dates. After applying search criteria, select Go.

3. Requisitions can be filtered by their workflow status using the filter in the Search Details box. Select the Pending option in the Workflow status section.

4. All requisitions with a pending workflow status will appear. For more details about the workflow status, select a requisition number.

5. Select the PR Approvals link in the Requisition panel to review purchase requisition workflow status details.

6. Details including all workflow steps and the current workflow step of the requisition will be displayed. Details about workflow steps can be seen by clicking the name of the workflow step.
4.1 Assigning Substitute Requesters
Target Audience: Shopper/Requester

When a cart is assigned to an assignee, or requester, the cart must be submitted in order for processing to begin. A requester can assign a substitute requisitioner to assist with the cart submission. The substitute is able to review the cart assigned to the original assignee.

1. Once logged into SciQuest, click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and View Draft Shopping Carts.

2. From the draft carts sub tab, click the Assign Substitute link.

3. From the User Search popup, enter the criteria to find the user that you would like to assign as the substitute requester and click Search.

4. Select the appropriate user that should be the assigned requester.

5. The requester selected is now the substitute assignee. Click End Substitution button on the draft carts to remove the substitution setting.
4.2 Navigating Approver Workflow Queues

Target Audience: requester/Approver

- **Filter Queues** offer several ways to view pending approvals including document type (e.g. requisitions, invoices, match exceptions), date range, and document attributes. (e.g. chartfield values, supplier, prepared by, status)

- **Sort Queues** allows the approval queue to be listed by a preferred order including: submit date, requisition number, folder entry date, and dollar amount.

- **Group Results** allows the approver to toggle between a list view (show all requisitions in order) or a collapsed folder view. (arranged by department org approval queues)

1. Navigate to the **Documents** icon in the left menu panel, navigate to **Orders and Documents**, select **Approvals** and **My Approvals**.

2. Within the My PR Approvals screen, **Group Results** by can be found in the top left of the screen. Selecting **Folders** shows the pending approvals by department org approval queue. As shown below. Selecting ‘List’ shows pending approvals in an expanded list view, as shown below.

3. Filters can be applied to easily navigate requisition approvals.

4. Important categories are noted below:
   - **Type**: Requisitions will show Procurement requisitions, Payment Requests, and Form-based requests. Invoices will show Match Exceptions.
   - **Supplier**: The supplier who will be providing the goods or services.
   - **Organization**: Shows the department the request originated from
   - **Prepared By**: The individual who prepared the requisition and submitted it for approval.
   - **Prepared For**: The individual that the requisition was prepared for.
   - **State**: The current status of the document. Documents can be **assigned**, **unassigned**, or **placed on hold**. The hold feature is useful for separating documents that require follow up from new requests. Assigned documents indicate an approver has taken ownership. Unassigned documents reside in a share approval queue, any participating approvers can access the document.
5. Approval documents have several sorting options that can be selected using the **Sort By** drop down menu, as shown below:

![Sorting Options](image)

**Note:** The sorting behavior will be impacted by the 'Group Results By' option as well. A list view will sort documents, a folder view will overlay the sort results into each approval queue folder.

6. Approvers can interact with multiple documents, if necessary. For example, if several requisitions have been reviewed, the approver can select those requisitions and approve them at the same time using the available drop down menu shown below. This menu includes Assign, Approve/Complete, Return to Shared Folder, Place PR on Hold, and Add Notes to History.

![Interaction Options](image)
4.3 Reviewing, Assigning and Approving Requisitions
Target Audience: requester/Approver

1. From the Navigation Menu, select the Documents icon and then select Approvals. Select My Approvals.

2. To preview the requisition, click the magnifying glass icon. The preview allows you to quickly review the requisition data, including accounting codes, product information, shipping information etc. You can also approve the requisition, if appropriate, or assign it to yourself for further review. Using the Previous and Next inks allows navigation through the approval queue from one requisition to the next, without exiting the Preview Screen.

3. All of your pending approvals will appear on the My Approvals Requisition page. Some approvals may already be assigned and others may not. Assigned approvals will have the Approve action available and unassigned approvals will have the Assign action available.

4. Before assigning or completing a requisition, you should review all components of the requisition including PR approvals and PO previews, comments, attached documents, and history. Those components are accessible via the menu bar highlighted below.

5. To assign a requisition, select the check box of a specific requisition number and click Assign.
6. Once the approval has been assigned, it will appear in your My Approvals folder and the Approve action will be available. To approve a requisition, select the checkbox of a requisition number and click Approve. If you would like to approve multiple requisitions at a time, select multiple checkboxes and select Approve/Complete from the drop down menu in the top right corner.

7. After the final selections have been made, click Go.
4.4 Returning Requisitions to Shared Approver Folders
Target Audience: Requester/Approver

1. From the My Approvals Requisition page, select the check box of the requisition that should be returned to the Shared Approver Folder.

2. Select Return to Shared Folders option from the drop down menu in the top right corner and select Go.
4.5 Sending Comments to the requester without Returning the Requisition

Target Audience: Requester/Approver

Requesters and Approvers have the ability to add comments to the PR. In addition, a comment may be sent to other SciQuest users. Notification of a “comment” will be transmitted via email to the designated recipients.

1. From the Navigation Menu, select the Documents icon and then select Approvals. Select My Approvals.

2. Select the appropriate requisition number that should have comments added to the Requester.

3. From the Document Actions drop down menu, select Add Comment.

4. Add the comment that should be sent to the requester. The requester will receive a notification and an email regarding the requisition.
4.6 Forwarding a Requisition to Another Approver
Target Audience: Approver

1. From the My Approvals Requisition page, select the check box of the requisition that should be forwarded to another approver.

2. Select Forward from the drop down menu in the right hand corner and select Go.

3. A User Search pop up window will appear. Enter the name of the desired user and click Search.

4. If desired, enter a message for the approver that will receive this purchase requisition and click Forward.
4.7 Rejecting Requisitions
Target Audience: Approver

To reject a requisition or order, Approvers now have the ability to reject all lines of a requisition in one single action rather than line by line. Select Site also allows you to delete select line items from a requisition or order. This exercise explains how an approver can reject documents and lines from PR documents.

NOTE: If the approver enters a rejection note, this information will be sent with the rejection email to the requisitioner.

1. From the Navigation Menu, select the Documents icon and then select Approvals. Select My Approvals.

2. Select the appropriate requisition number to be rejected.

3. From the Document Actions drop down menu, select Reject Requisition. You also have the option to reject requisitions at the line item by scrolling down to the Lines section of the PR.

4. Before returning the requisition, include a reason for rejecting the requisition.
### 4.8 Removing/Editing Notifications

**Target Audience:** Approver

When actions are performed in SciQuest, emails can be generated to notify users of these actions. It’s recommended that users check these email notification boxes to increase the level of individual notification. By clicking the question mark icon, a brief definition will be displayed to assist users in making a decision.

1. Navigate to the **View My Profile** link in the top right hand corner of SciQuest.

2. Select **Notification Preferences** option and then select **Shopping, Carts & Requisitions**.

3. From the Notification Preferences screen, select **Edit Section** in the top right corner.

4. For the applicable preferences, select **Override** and choose the **Notification Type** that is desired. Select **Save Changes**.
5. In the right hand corner of the SciQuest Homepage, a notification showing your **Action Items** will appear. Select **Requisitions to Approve** for more information on the action items.

6. Notifications will remain in your action items until they have been completed. In this example, the 9 requisitions to be approved must be approved or forwarded before being removed from the list of action items.
4.9 Reviewing and Approving Form Requisitions

Target Audience: Approver

Non-catalog and special request items require reviewing and approving similar to typical catalog purchase requisitions. Approvers have the ability to review these form requisitions in the same manner of reviewing/approving catalog requisitions.


2. From the search document screen, enter the purchase requisition number from the non-catalog and/or special request form requisition.

3. Click the magnifying glass next to the purchase requisition.

4. A summary about the purchase requisition will appear. Click Close after reviewing the document.

5. From the search screen, select the Purchase Requisition number. The purchase requisition will appear in a new screen. From Document Actions, select Approve/Complete Step to approve the requisition after it has been reviewed thoroughly.
4.10 Returning Requisitions to Requesters
Target Audience: Approver

Approvers have the ability to return the requisition to the requester for modifications/changes. This action will cause the requisition to go back to a draft cart and will need to be re-submitted to restart to the first step of workflow. Search for pending requisitions that are assigned to you in the document search to return requisitions.

An Approver has the ability to return the Purchase Requisition (PR) to the requester (requisitioner) for any changes/updates that need to be made. This will allow the Approver to return rather than reject the PR.

1. From the Navigation Menu, select the Documents icon and then select Approvals. Select My Approvals.

2. Select the appropriate requisition number to be returned.

3. From the Document Actions drop down menu, select Return to Requisitioner.

4. Before returning the requisition, include a reason for returning the requisition to the requisitioner.
4.11 Assigning Substitute Approvers
Target Audience: Approver

As an Approver there may be times that you will need to assign a substitute to approve PRs. This substitute will perform Approver functions until he/she is no longer designated as a substitute. You may assign anyone as a substitute but that individual will also need to be an Approver.

1. From the Navigation Menu, select the Documents icon and then select Approvals. Select Assign Substitute Approvers.

2. The Managing Requisitions page will show all Requisition Folders. From this page, select the check box of the Requisition Folder that you would like to Assign a Substitute to then click Assign.

3. Type the name of the Substitute Approver in the text box and select Assign.