

# PROCUREMENT

## RELEASE FOR OR REMOVE FROM APPROVAL

A Purchase Requisition can only be **Released for Approval** if the total value is more than R0, if all items have a quantity greater than 0 and if all parts have a supplier cost linked.

Purchase Requisitions must go through an approval process before a Purchase Order is created. (This can be linked to an [Approval Matrix](#) which is set up in the [Purchasing Centre](#))

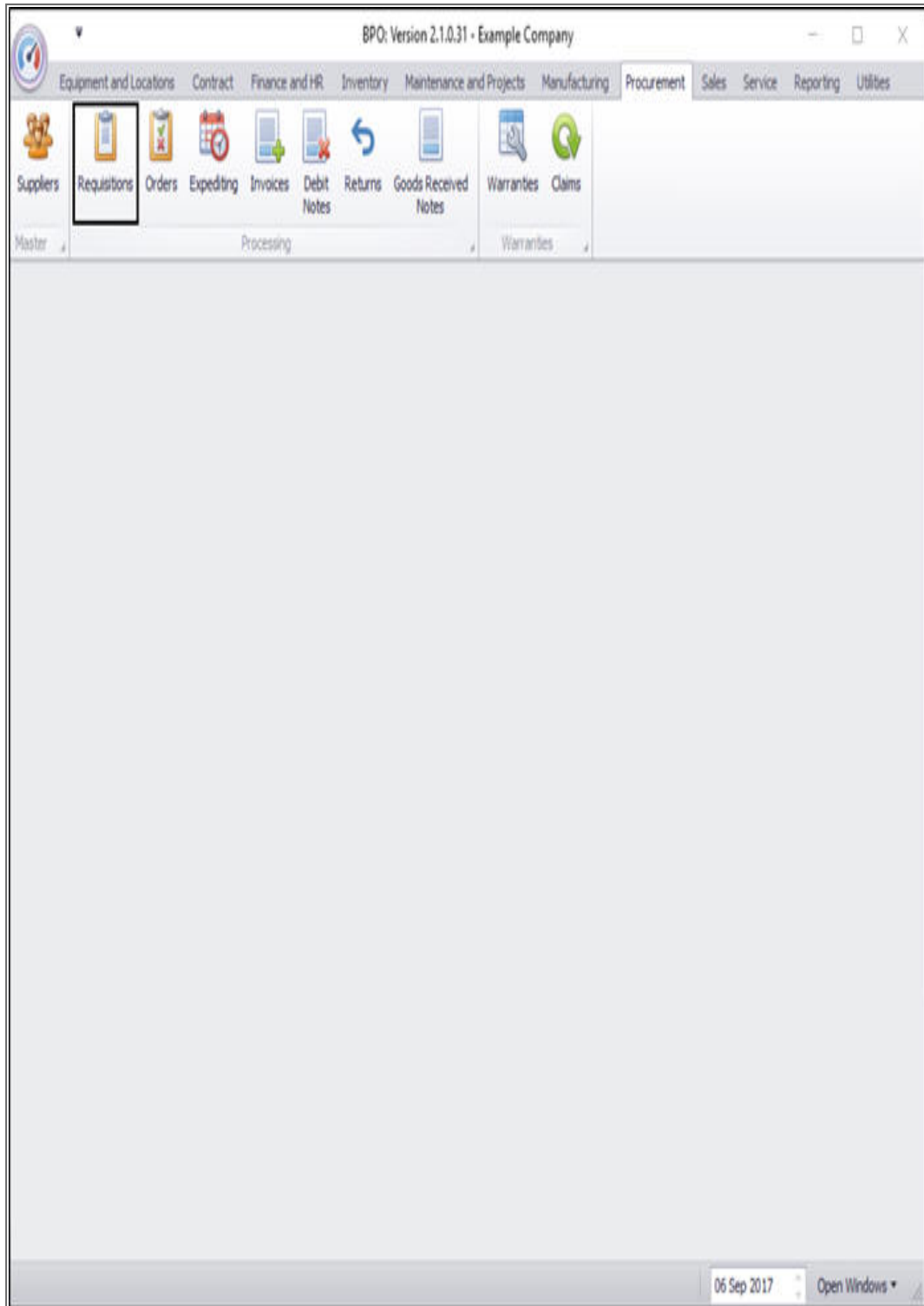
On approving a Purchase Requisition, the system will generate a Purchase Order.

Requisition Approval and Authorisation Levels are covered in [procurement configuration](#).

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**Ribbon Access:** *Procurement > Requisitions*

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The ***Purchase Requisition Listing*** screen will be displayed.

### Select the Site and Status

- Select the **Site**.
  - In this image **Durban** has been selected.
- Select the **Status**.
  - The status will need to be set to **New** as a purchase requisition can only be released in the **New** status.

Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Decline Save Layout Workspaces Print Export Durban New Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:20			Yes
PR0000357	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:42:48			Yes
PR0000359	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:07:59	Test 2.1.0.4 Procure...	Test 2.1.0.4 Procure...	Yes
PR0000361	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:48:50			Yes
PR0000362	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	12:22:33	Please phone with lat...	Please phone with la...	Yes
PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	procurement from a c...	procurement from a ...	Yes
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25	Standalone work orde...	Standalone work ord...	Yes
PR0000366	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:10:09	v2.1.0.4 standalone ...	v2.1.0.4 standalone ...	Yes
PR0000367	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:34:00	OTC procurement v2...	OTC procurement v2...	Yes
PR0000368	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:30:38	stock report procurem...	stock report procure...	Yes
PR0000369	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:38:47	v2.1.0.4 stock report ...	v2.1.0.4 stock repor...	Yes
PR0000370	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:42:55			Yes
PR0000374	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	09:15:58	call procurement v2.1...	call procurement v2...	Yes
PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Project procurement 2...	Project procurement ...	Yes
PR0000380	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:00:43			No
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58			Yes
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40			Yes
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18			Yes
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09			Yes
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			Yes
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			Yes
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000401	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000402	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000403	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000406	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000408	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000410	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000411	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000412	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000413	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000414	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
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PR0000486	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000487	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000488	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000489	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000490	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000491	MAINT	N	MUD001							

## RELEASE REQUISITION FOR APPROVAL

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- Select the **row** of the purchase requisition that you wish to **release**.

*Either*

- Go to the **Process Action Button Toolbar** and select **Release**,

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PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25	Standalone work orde...	Standalone work ord...	Yes
PR0000366	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:10:09	v2.1.0.4 standalone ...	v2.1.0.4 standalone ...	Yes
PR0000367	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:33:59	OTC procurement v2...	OTC procurement v2...	Yes
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PR0000471	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000472	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000473	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000474	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000475	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000476	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000477	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000478	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000479	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000480	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000481	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000482	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000483	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000484	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000485	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000486	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000487	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000488	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000489	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000490	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000491	MAINT	N	MUD0							

- **Right click** anywhere in the **row** of the selected requisition.
- A **Process** menu will pop up.
  - In this menu, you will have a list of the following options depending on where the requisition is in the process:
    - **Hold** Remove from Approval
    - **Release** Release to Approval
    - **Approve** Approve the Requisition
    - **Decline** Decline the Requisition
  - As this Purchase Requisition is in the **New** status, the only option available in this image, is the **Release to Approval** choice.
- Click on the **Release to Approval** option.



Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Decline Save Layout Workspaces Print Export Durban New Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:20			Yes
PR0000357	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:42:48			Yes
PR0000359	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:07:59	Test 2.1.0.4 Procure...	Test 2.1.0.4 Procure...	Yes
PR0000361	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:48:50			Yes
PR0000362	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	12:22:33	Please phone with lat...	Please phone with la...	Yes
PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	procurement from a c...	procurement from a ...	Yes
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25	Standalone work orde...	Standalone work ord...	Yes
PR0000366	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:10:09	v2.1.0.4 standalone ...	v2.1.0.4 standalone ...	Yes
PR0000367	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:34:00	OTC procurement v2....	OTC procurement v2...	Yes
PR0000368	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:30:38	stock report procurem...	stock report procure...	Yes
PR0000369	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:38:47	v2.1.0.4 stock report ...	v2.1.0.4 stock repor...	Yes
PR0000370	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:42:55			Yes
PR0000374	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	09:15:58	call procurement v2.1....	call procurement v2...	Yes
PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Project procurement 2...	Project procurement ...	Yes
PR0000380	MAINT	N	MUD001	Du Toit	Mudderveld	18 May 2017	12:00:43			No
PR0000381	MAINT	N	MUD001	Du Toit	Mudderveld	18 May 2017	12:02:58			Yes
PR0000385	MAINT	N	MUD001	Du Toit	Mudderveld	18 May 2017	14:12:40			Yes
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18			Yes
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09			Yes
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			Yes
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			Yes
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:54:13			Yes

06 Sep 2017 Open Windows

- A **Requisition Process** message box will pop up informing you that;



- *The Requisition no. [ ] has been released successfully.*
- Click on **OK**.

Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Decline Save Layout Workspaces Print Export Durban New Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:20			Yes
PR0000357	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:42:48			Yes
PR0000359	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:07:59	Test 2.1.0.4 Procure...	Test 2.1.0.4 Procure...	Yes
PR0000361	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:48:50			Yes
PR0000362	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	12:22:33	Please phone with lat...	Please phone with la...	Yes
PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	procurement from a c...	procurement from a ...	Yes
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25	Standalone work orde...	Standalone work ord...	Yes
PR0000366	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:10:09	v2.1.0.4 standalone ...	v2.1.0.4 standalone ...	Yes
PR0000367	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:33:59	OTC procurement v2....	OTC procurement v2...	Yes
PR0000368	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:30:38	stock report procurem...	stock report procure...	Yes
PR0000369	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:38:47	v2.1.0.4 stock report ...	v2.1.0.4 stock repor...	Yes
PR0000370	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:42:55			Yes
PR0000374	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	09:19:58	call procurement v2.1....	call procurement v2...	Yes
PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Project procurement 2...	Project procurement ...	Yes
PR0000380	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:00:43			No
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58			Yes
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40			Yes
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18			Yes
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09			Yes
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53			Yes
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11			Yes
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19			Yes
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:14:19			Yes

Requisition - Process

The requisition no. PR0000367, has been released successfully.

OK

06 Sep 2017 Open Windows

- The requisition will be removed from the *Purchase Requisition Listing* screen where the status is set to *New*.

### **VIEW RELEASED REQUISITION**

---

- Find the requisition by changing the status to *Released*.

Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home

Equipment and Locations

Contract

Finance and HR

Inventory

Maintenance and Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Durban

New

Refresh

Status

StatusDesc

A

Approved

C

Closed

D

Declined

I

Issued

N

New

R

Released

PRCode

PRTYPE

Status

EmployeeNumber

FirstName

LastName

EventDate

EventTime

SupplierExist

PR0000356	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:21:2	Yes
PR0000357	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	10:42:4	Yes
PR0000359	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:07:59	Test 2.1.0.4 Procure... Test 2.1.0.4 Procure... Yes
PR0000361	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	11:48:50	Yes
PR0000362	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	12:22:33	Please phone with lat... Please phone with la... Yes
PR0000363	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	13:44:30	procurement from a c... procurement from a ... Yes
PR0000364	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	14:01:25	Standalone work orde... Standalone work ord... Yes
PR0000366	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	15:10:09	v2.1.0.4 standalone ... v2.1.0.4 standalone ... Yes
PR0000368	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:30:38	stock report procurem... stock report procure... Yes
PR0000369	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:38:47	v2.1.0.4 stock report ... v2.1.0.4 stock repor... Yes
PR0000370	MAINT	N	MUD001	Mark	Mudderveld	17 May 2017	16:42:55	Yes
PR0000374	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	09:15:58	call procurement v2.1... call procurement v2... Yes
PR0000377	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	11:48:59	Project procurement 2... Project procurement ... Yes
PR0000380	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:00:43	No
PR0000381	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	12:02:58	Yes
PR0000385	MAINT	N	DUT001	Susan	Du Toit	18 May 2017	14:12:40	Yes
PR0000386	MAINT	N	MUD001	Mark	Mudderveld	18 May 2017	14:58:18	Yes
PR0000396	MAINT	N	DUT001	Susan	Du Toit	19 May 2017	11:31:09	Yes
PR0000397	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:53	Yes
PR0000398	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	11:45:11	Yes
PR0000400	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:12:19	Yes
PR0000404	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:54:12	Yes
PR0000405	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	12:56:25	retest retest Yes
PR0000407	MAINT	N	MUD001	Mark	Mudderveld	19 May 2017	13:15:14	Yes
PR0000409	MAINT	N	MUD001	Mark	Mudderveld	22 May 2017	12:11:42	Yes

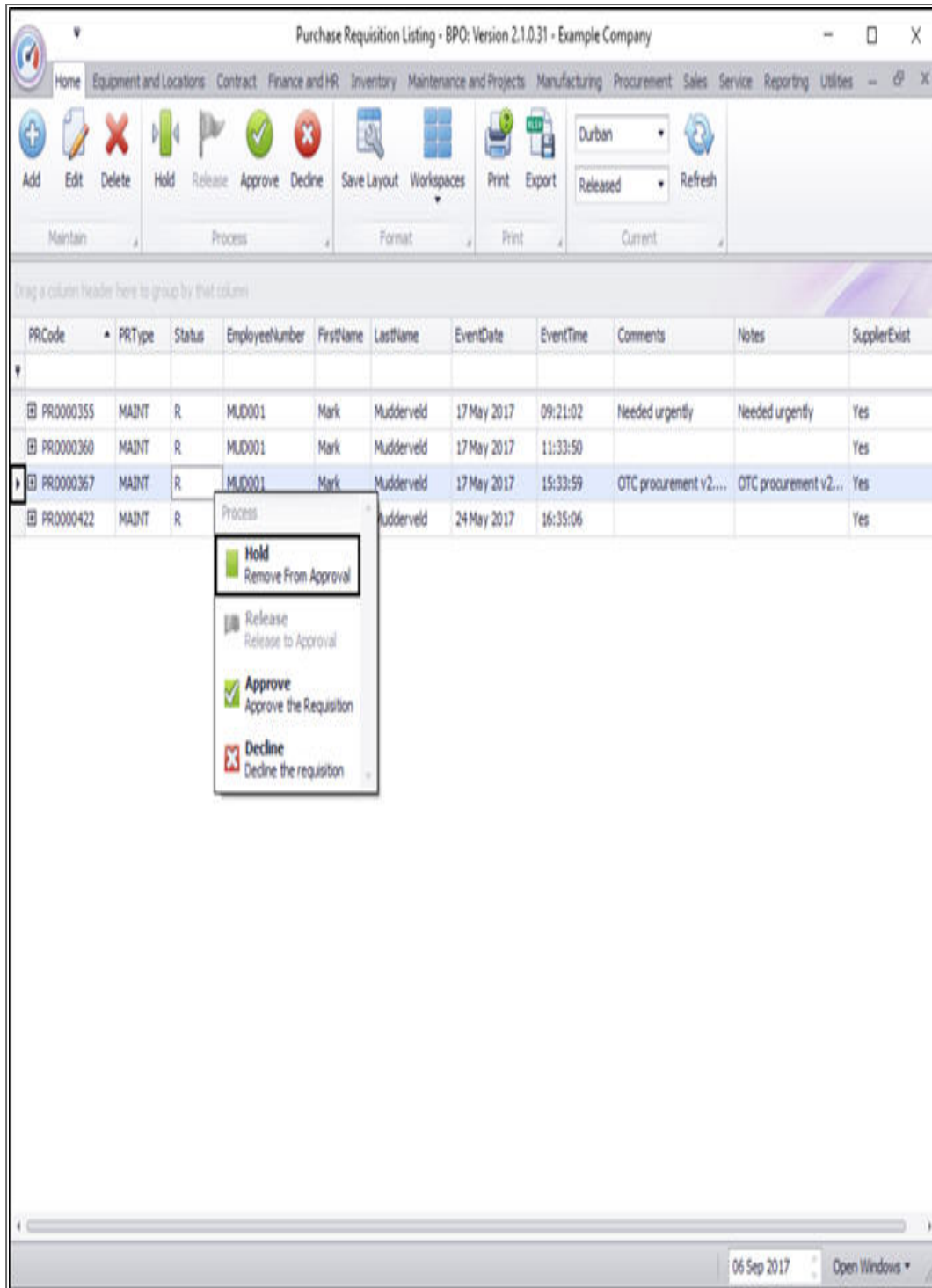
- The **Purchase Requisition Listing** screen will now only display the requisitions in the **Released** status awaiting **Approval**.

Note: In this screen, the requisition can also be **Declined** or put on **Hold**.

## REMOVE REQUISITION FROM APPROVAL (PLACE ON HOLD)

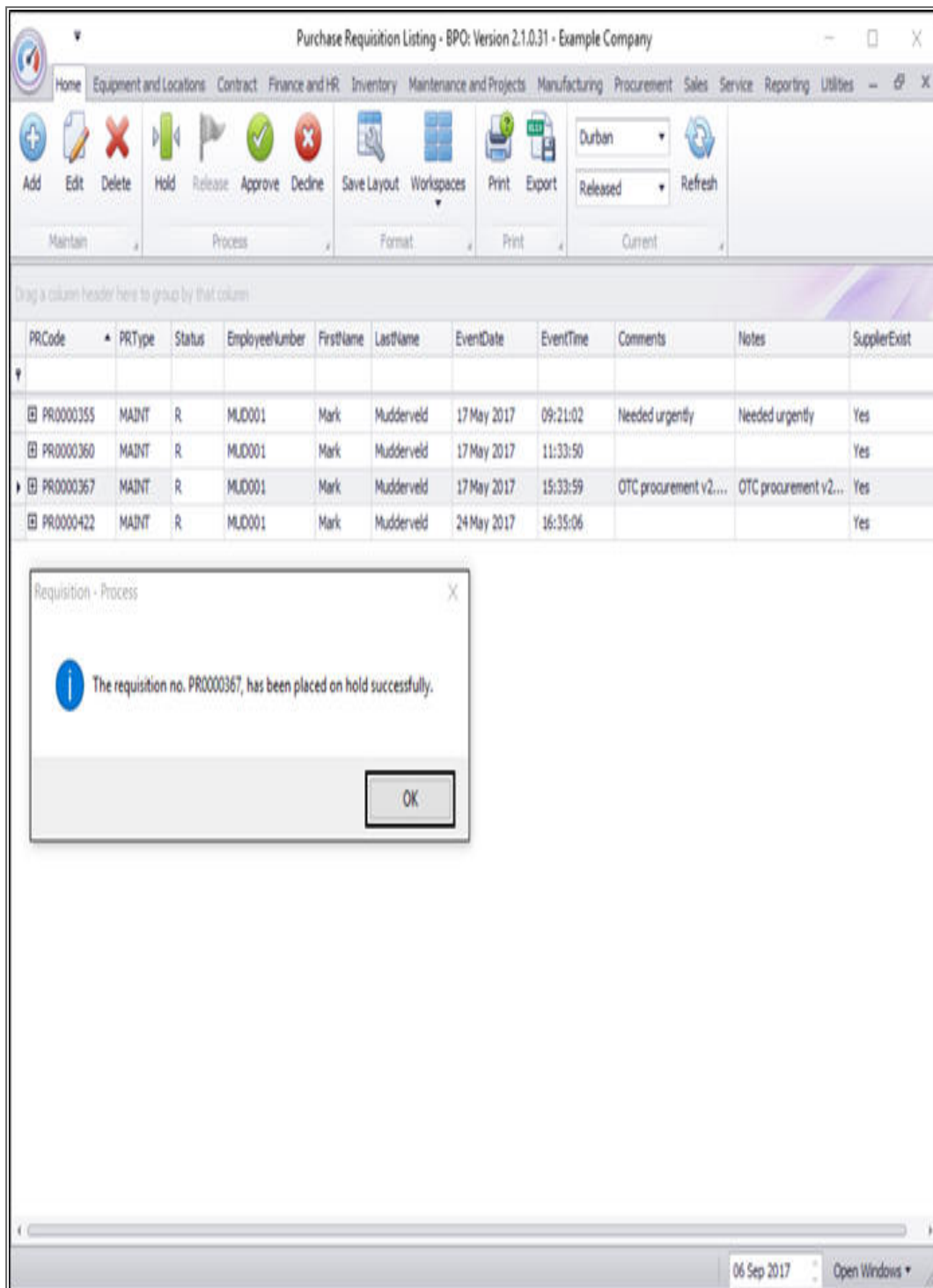
---

- Select the row of the requisition you wish to ***Remove from Approval.***
- Either click on the relevant button in the Action Button Toolbar or right click anywhere in the row of that requisition to display the pop up ***Process*** menu.
- Click on the ***Hold - Remove from Approval*** option.



- A **Requisition - Process** message box will appear informing you that;

- ***The requisition no. [] has been placed on hold successfully.***
- Click on **OK**.



The screenshot displays the 'Purchase Requisition Listing - BPO; Version 2.1.0.31 - Example Company' window. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Hold, Release, Approve, Decline, Save Layout, Workspaces, Print, Export, and Refresh. A dropdown menu for 'Durban' is also visible.

The main data table lists requisitions with the following columns: PRCode, PRType, Status, EmployeeNumber, FirstName, LastName, EventDate, EventTime, Comments, Notes, and SupplierExist. The table contains four rows of data:

PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000367	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	15:33:59	OTC procurement v2....	OTC procurement v2...	Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

Overlaid on the bottom of the main window is a 'Requisition - Process' dialog box. It contains an information icon and the message: 'The requisition no. PR0000367, has been placed on hold successfully.' An 'OK' button is located at the bottom right of the dialog box.

The status bar at the bottom of the main window shows the date '06 Sep 2017' and a dropdown for 'Open Windows'.



## VIEW REQUISITION IN NEW STATUS

---

- You can no longer view the selected requisition in this ***Purchase Requisition Listing*** screen as the requisition has reverted back to the ***New*** status.
- To view the requisition, change the ***Purchase Requisition Listing*** screen status back to ***New***.



Purchase Requisition Listing - BPO; Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Dedine Save Layout Workspaces Print Export Durban Released Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

06 Sep 2017 Open Windows

## APPROVE REQUISITION

---

- Find the Requisition in the *Purchase Requisition Listing* screen where the status is set to *Released*.
- Select the row of the requisition you wish to *Approve*.
- Click on *Approve*.

Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release **Approve** Decline Save Layout Workspaces Print Export Durban Released Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

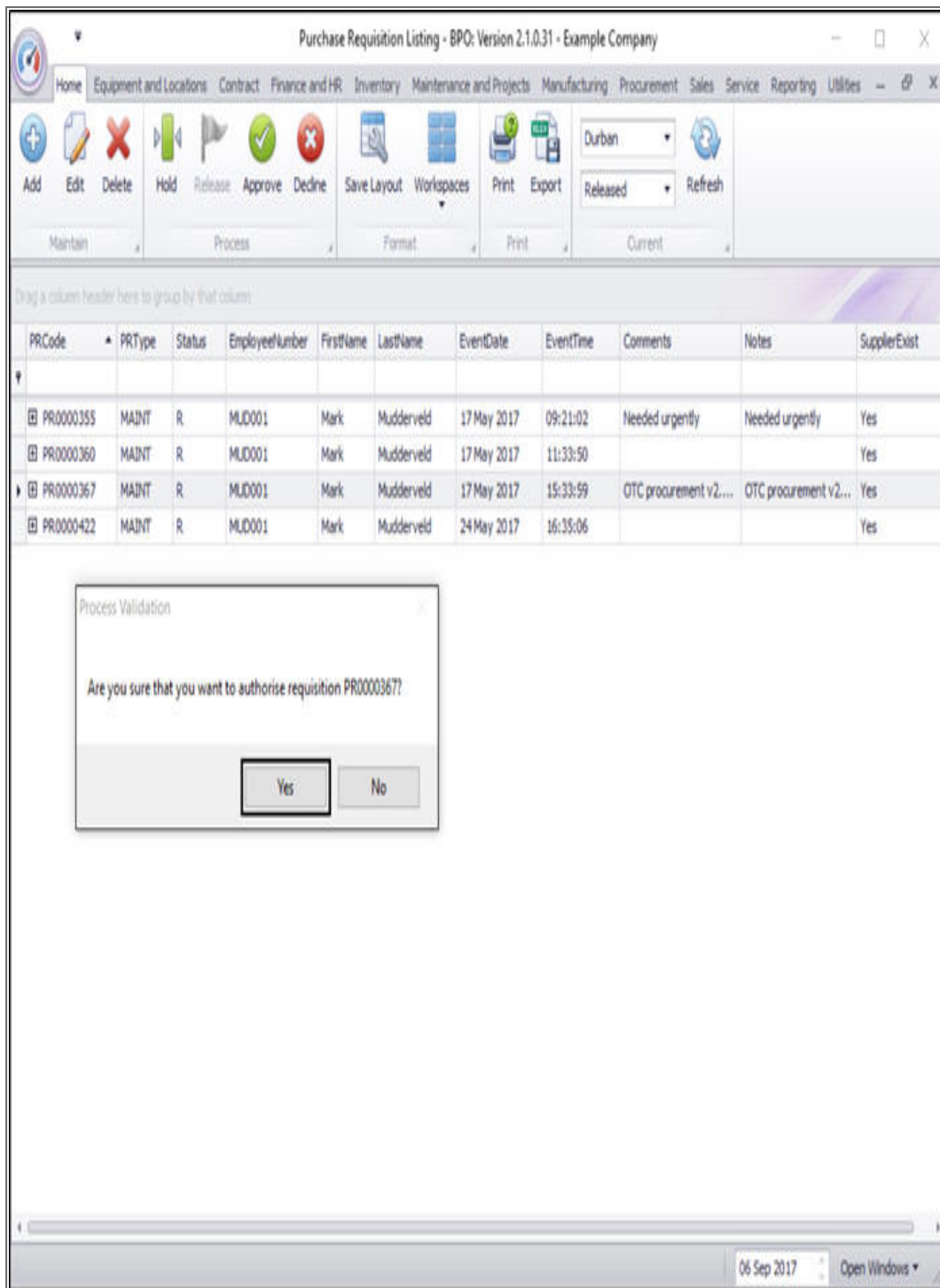
PRCode	PRTYPE	Status	EmployeeNumber	Firstname	Lastname	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000367	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	15:33:59	OTC procurement v2....	OTC procurement v2...	Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

06 Sep 2017 Open Windows

- A **Process Validation** message box will appear asking;
  - ***Are you sure that you want to authorise requisition []?***
- Click on **Yes**.

Note on Requisition Approval Matrix and corresponding Purchasing Centre Requisition Configuration

**Note:** If a second approval is required, the requisition will remain here until approval is complete. This requisition **Approval Matrix** is set up in the **Purchasing Centre Requisition configuration**.



Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Dedine Save Layout Workspaces Print Export Refresh

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000367	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	15:33:59	OTC procurement v2...	OTC procurement v2...	Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

Process Validation

Are you sure that you want to authorise requisition PR0000367?

Yes No

06 Sep 2017 Open Windows

- A **Requisition - Process** message box will appear informing you that;

- *Authorisation for requisition no. [] has been successful.*
- Click on **OK**.

Purchase Requisition Listing - BPO; Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Dedine Save Layout Workspaces Print Export Durban Released Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000367	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	15:33:59	OTC procurement v2....	OTC procurement v2...	Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

Requisition - Process

Information: Authorisation for requisition no. PR0000367, has been successful.

OK

06 Sep 2017 Open Windows



## VIEW SYSTEM GENERATED PURCHASE ORDER

---

- A **View Purchase Orders** message box will appear asking;
  - **Do you wish to view the new purchase orders?**
- Click on the **Yes**, if you want a quick link to the purchase order that has just be raised in order to view or print the order.
- Click on **No**, if you want to remain in the **Purchase Requisition Listing** screen.

To view the newly created Purchase Order later - go to

---

**Ribbon Access:** *Procurement > Purchase Orders*

---

Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Decline Save Layout Workspaces Print Export

Durban Released Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000367	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	15:33:59	OTC procurement v2....	OTC procurement v2...	Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

View Purchase Orders

Do you wish to view the new purchase orders?

Yes No

06 Sep 2017 Open Windows

- To view the approved requisition, change the status in the Purchase Requisition Listing screen to **Issued**.
- The approved requisition is now displayed in this listing screen.

Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Decline Save Layout Workspaces Print Export

Durban

Issued Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

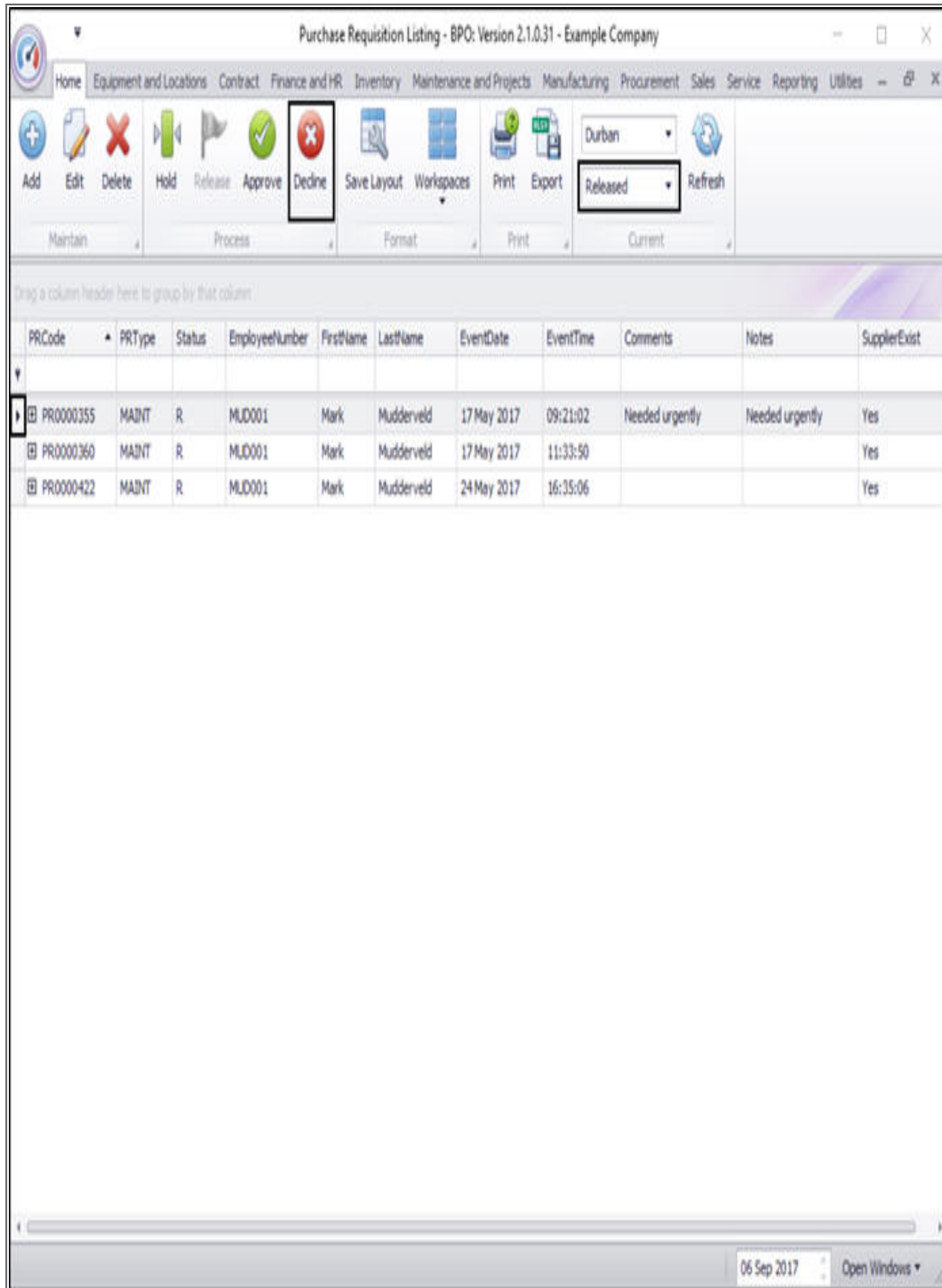
PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000328	MAINT	I	DUT001	Susan	Du Toit	15 Mar 2017	13:51:47			Yes
PR0000334	MAINT	I	DUT001	Susan	Du Toit	16 Mar 2017	13:55:10			Yes
PR0000336	CAP	I	MUD001	Mark	Mudderveld	03 Apr 2017	16:26:31			Yes
PR0000337	MAINT	I	DUT001	Susan	Du Toit	10 Apr 2017	15:18:49			Yes
PR0000339	MAINT	I	DUT001	Susan	Du Toit	11 Apr 2017	11:21:52			Yes
PR0000341	MAINT	I	DUT001	Susan	Du Toit	13 Apr 2017	11:12:32			Yes
PR0000342	MAINT	I	DUT001	Susan	Du Toit	13 Apr 2017	11:16:02			Yes
PR0000343	MAINT	I	DUT001	Susan	Du Toit	13 Apr 2017	11:18:04			Yes
PR0000347	MAINT	I	MUD001	Mark	Mudderveld	24 Apr 2017	14:54:55			Yes
PR0000348	CAP	I	DUT001	Susan	Du Toit	02 May 2017	15:54:44			Yes
PR0000349	CAP	I	DUT001	Susan	Du Toit	02 May 2017	15:59:17			Yes
PR0000350	CAP	I	DUT001	Susan	Du Toit	04 May 2017	09:13:33			Yes
PR0000354	MAINT	I	DUT001	Susan	Du Toit	04 May 2017	15:41:17			Yes
PR0000365	MAINT	I	MUD001	Mark	Mudderveld	17 May 2017	14:27:16			Yes
PR0000367	MAINT	I	MUD001	Mark	Mudderveld	17 May 2017	15:33:59	OTC procurement v2....	OTC procurement v2...	Yes
PR0000372	MAINT	I	MUD001	Mark	Mudderveld	18 May 2017	09:05:55			Yes
PR0000373	MAINT	I	MUD001	Mark	Mudderveld	18 May 2017	09:08:15			Yes
PR0000376	MAINT	I	MUD001	Mark	Mudderveld	18 May 2017	09:34:31			Yes
PR0000379	MAINT	I	MUD001	Mark	Mudderveld	18 May 2017	11:57:21			Yes
PR0000382	MAINT	I	DUT001	Susan	Du Toit	18 May 2017	12:07:56			Yes
PR0000383	MAINT	I	MUD001	Mark	Mudderveld	18 May 2017	12:46:28			Yes
PR0000384	MAINT	I	DUT001	Susan	Du Toit	18 May 2017	13:05:45	notes	test	Yes
PR0000387	MAINT	I	MUD001	Mark	Mudderveld	18 May 2017	15:17:19			Yes

06 Sep 2017 Open Windows

## DECLINE A REQUISITION

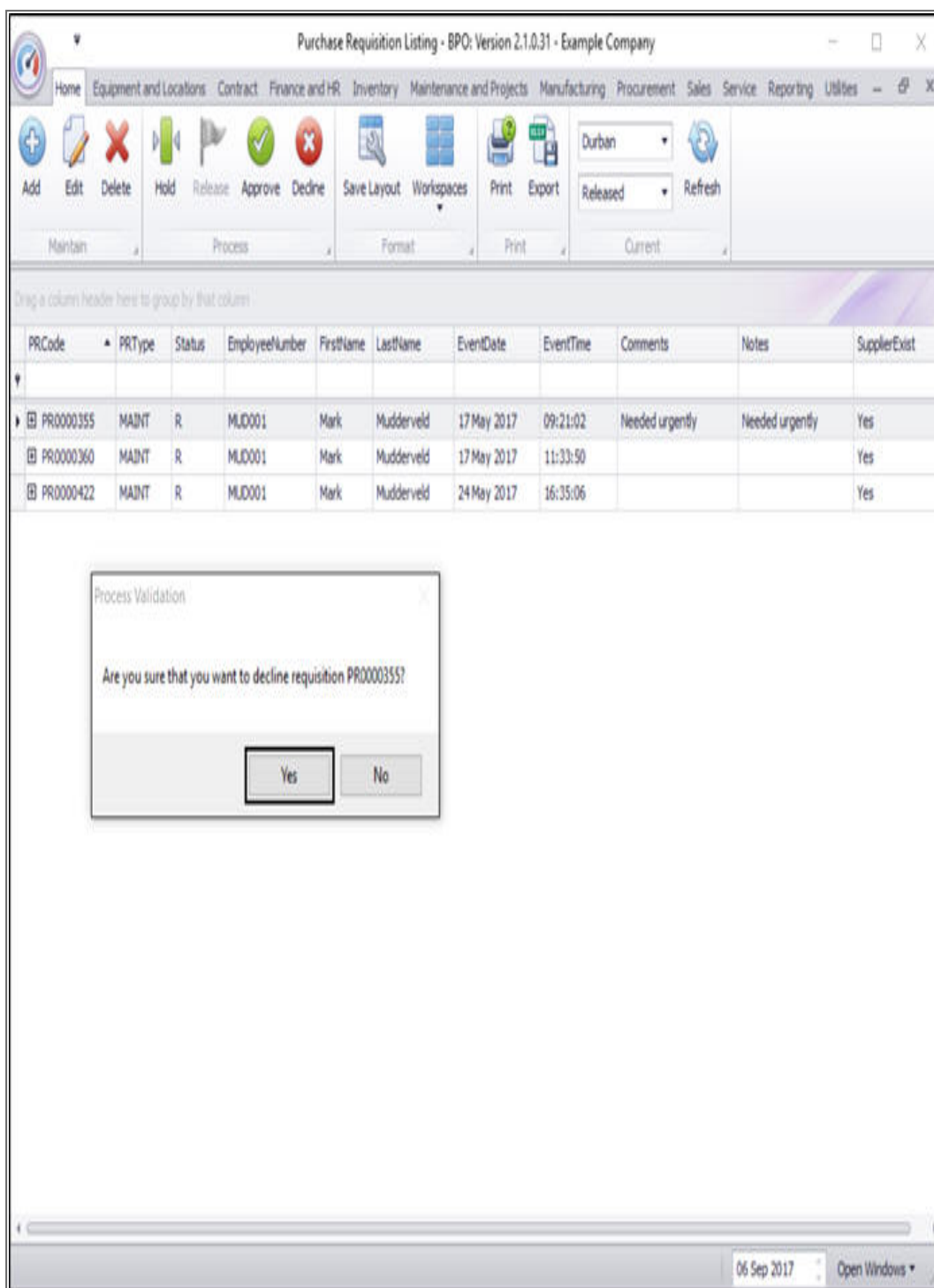
---

- Open the *Purchase Requisition Listing* screen and set the status to *Released*.
- Select the row of the requisition you wish to *decline*.
- Click on *Decline*.



- A **Process Validation** message box will appear, asking;
  - **Are you sure that you want to decline requisition [ ]?**

- Click on **Yes**.



The screenshot shows the 'Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company' application. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Hold, Release, Approve, Decline, Save Layout, Workspaces, Print, Export, and Refresh. A table displays a list of purchase requisitions with columns: PRCode, PRTYPE, Status, EmployeeNumber, FirstName, LastName, EventDate, EventTime, Comments, Notes, and SupplierExist. The table contains three rows of data. A 'Process Validation' dialog box is open, asking 'Are you sure that you want to decline requisition PR0000355?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box.

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

Process Validation

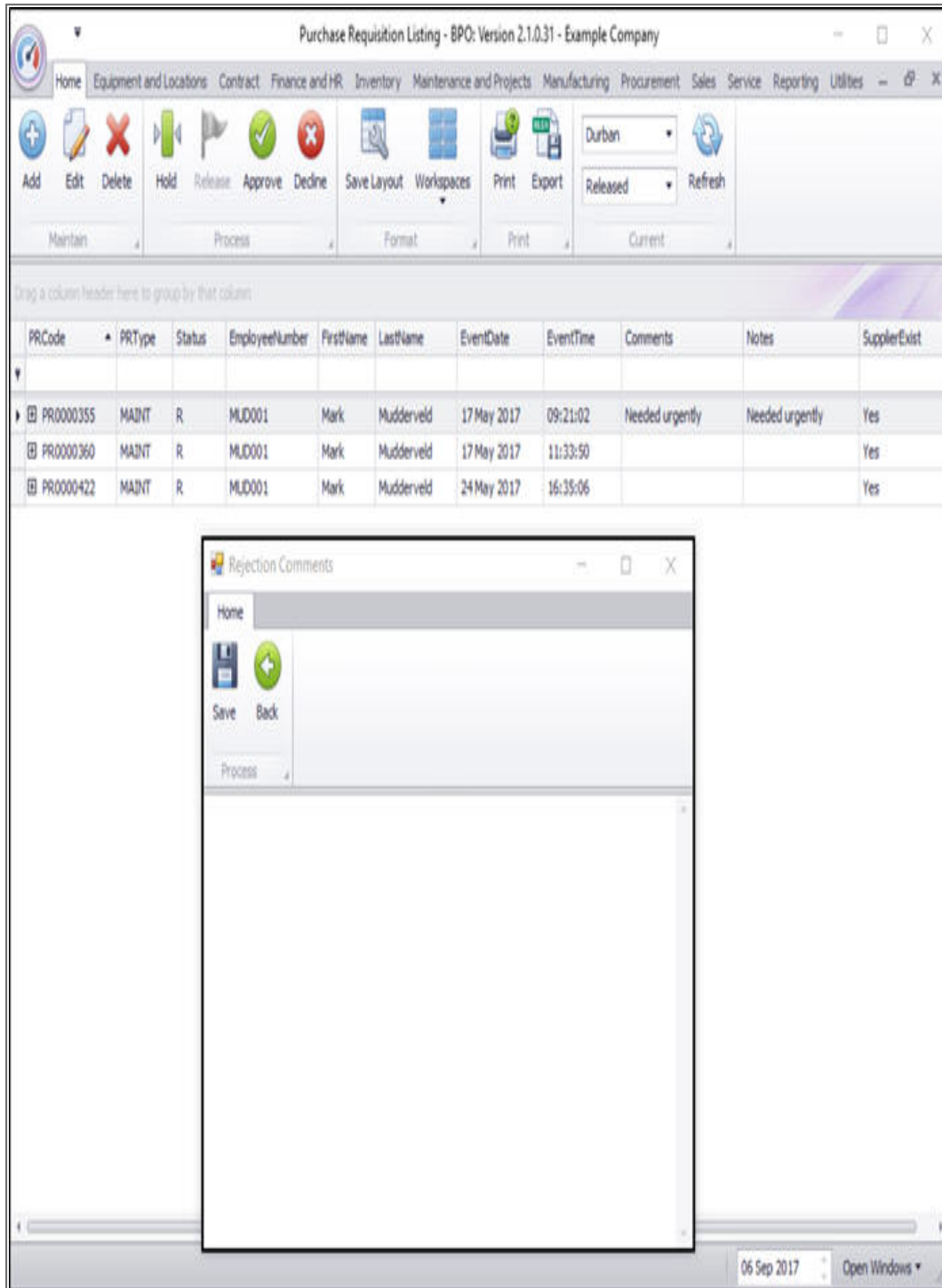
Are you sure that you want to decline requisition PR0000355?

Yes No

06 Sep 2017 Open Windows

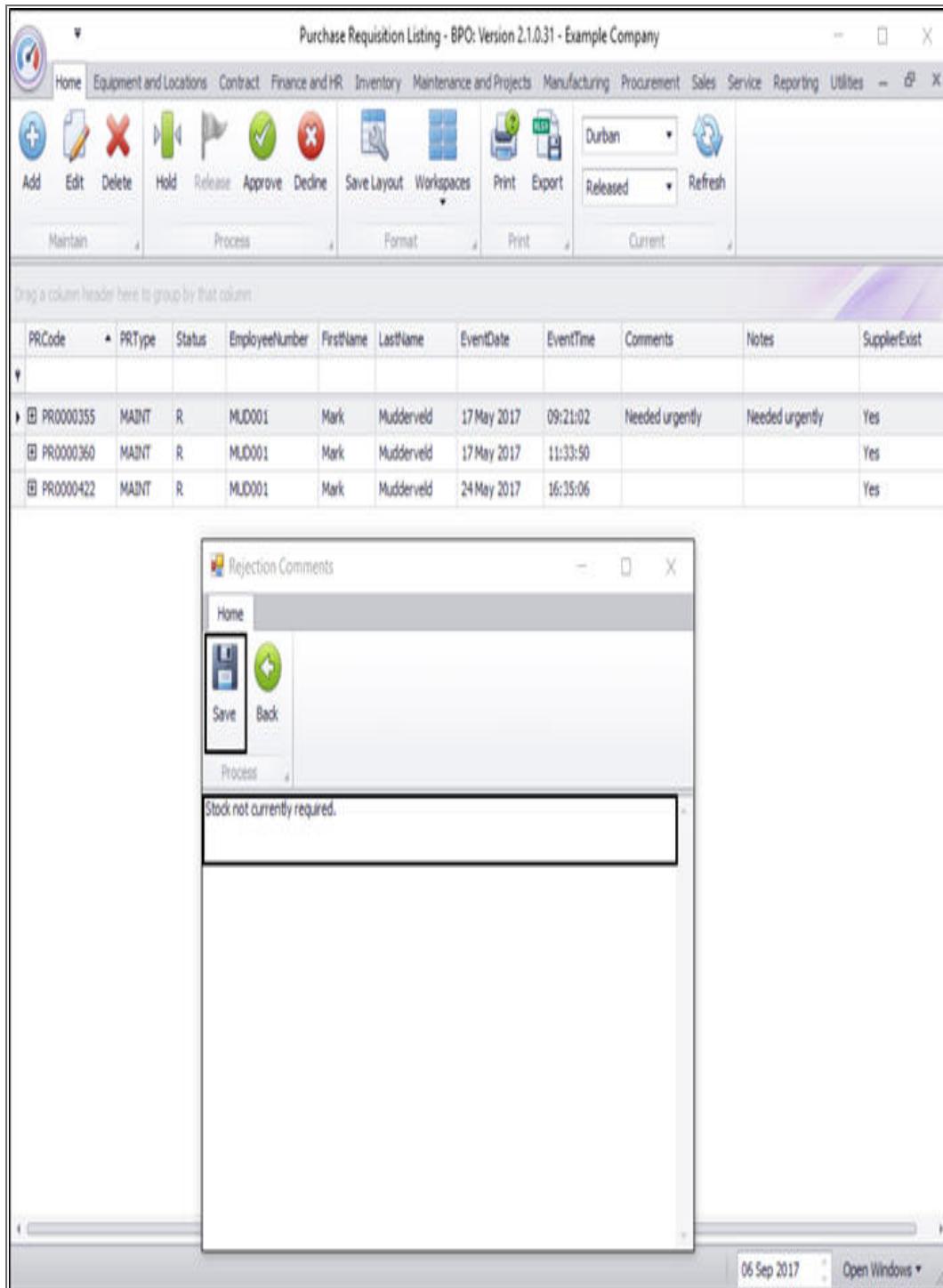
## DECLINE / REJECTION COMMENTS

- A **Rejection Comments** message box will appear.





- Type in any **Rejection Comments** concerning this requisition.
- Click on **Save**.



The screenshot shows the 'Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company' application. The main window displays a table of requisitions with columns: PRCode, PRTYPE, Status, EmployeeNumber, Firstname, Lastname, EventDate, EventTime, Comments, Notes, and SupplierExist. Three requisitions are listed:

PRCode	PRTYPE	Status	EmployeeNumber	Firstname	Lastname	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

A 'Rejection Comments' dialog box is open, showing a 'Home' tab with 'Save' and 'Back' buttons. The 'Process' tab is selected, and the text 'Stock not currently required.' is entered in the comment field.

- A **Requisition Process** message box will appear informing you that;
  - ***Requisition no. [] has been declined.***
- Click on **OK**.

Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Decline Save Layout Workspaces Print Export Durban Released Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	Firstname	Lastname	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000355	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000360	MAINT	R	MUD001	Mark	Mudderveld	17 May 2017	11:33:50			Yes
PR0000422	MAINT	R	MUD001	Mark	Mudderveld	24 May 2017	16:35:06			Yes

Requisition - Process

Requisition no. PR0000355, has been declined.

OK

06 Sep 2017 Open Windows

## VIEW DECLINED REQUISITION STATUS

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- The requisition will be **removed** from this **Purchase Requisition Listing** screen.
- To view the declined requisition, change the **status** in this listing screen to **Declined**.
- The declined requisition is now displayed in this **Declined** status.

Purchase Requisition Listing - BPO: Version 2.1.0.31 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Hold Release Approve Decline Save Layout Workspaces Print Export Durban Declined Refresh

Drag a column header here to group by that column

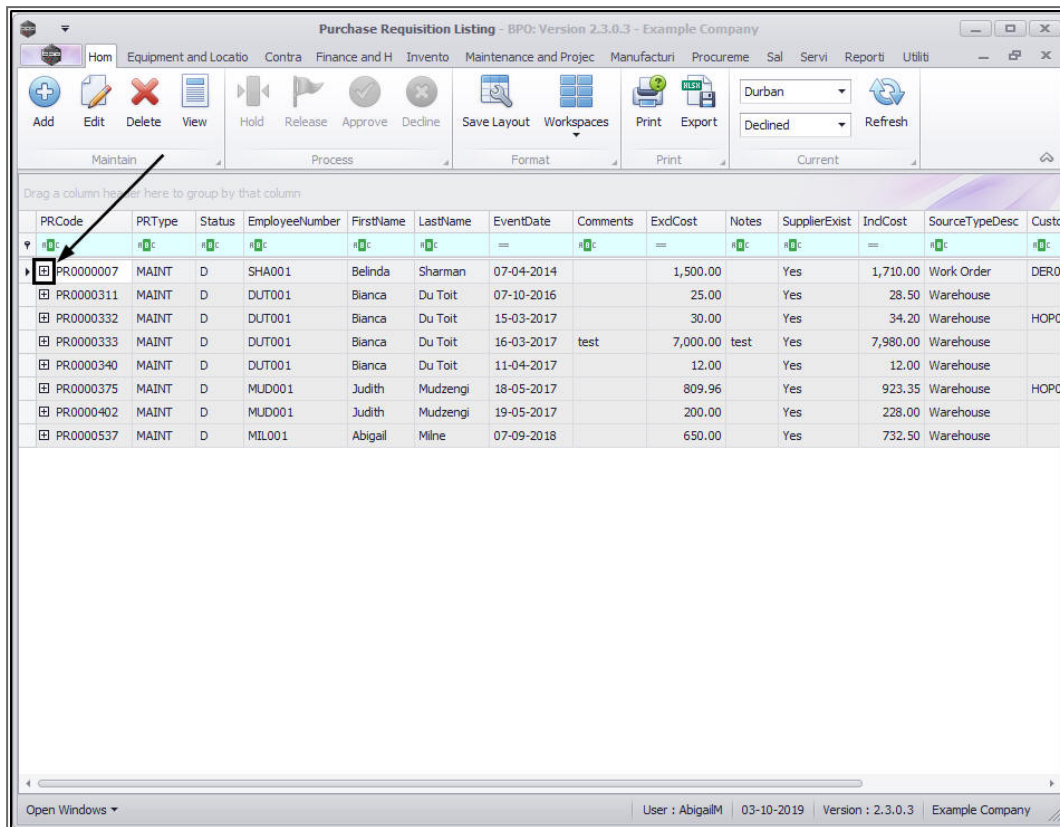
PRCode	PRTYPE	Status	EmployeeNumber	Firstname	Lastname	EventDate	EventTime	Comments	Notes	SupplierExist
PR0000007	MAINT	D	SHA001	Belinda	Sharman	07 Apr 2014	15:35:29			Yes
PR0000311	MAINT	D	DUT001	Susan	Du Toit	07 Oct 2016	13:52:51			Yes
PR0000332	MAINT	D	DUT001	Susan	Du Toit	15 Mar 2017	16:20:33			Yes
PR0000333	MAINT	D	DUT001	Susan	Du Toit	16 Mar 2017	08:59:16	test	test	Yes
PR0000340	MAINT	D	DUT001	Susan	Du Toit	11 Apr 2017	11:43:48			Yes
PR0000355	MAINT	D	MUD001	Mark	Mudderveld	17 May 2017	09:21:02	Needed urgently	Needed urgently	Yes
PR0000358	MAINT	D	MUD001	Mark	Mudderveld	17 May 2017	10:56:15	Please phone with lat...	Please phone with la...	Yes
PR0000375	MAINT	D	MUD001	Mark	Mudderveld	18 May 2017	09:22:33			Yes
PR0000402	MAINT	D	MUD001	Mark	Mudderveld	19 May 2017	12:17:09			Yes

06 Sep 2017 Open Windows

## VIEW DECLINED REQUISITION REASON

You can view the reason for the refusal of any requisition.

- Click on the expand icon in front of a selected requisition.



PRCode	PRType	Status	EmployeeNumber	FirstName	LastName	EventDate	Comments	ExdCost	Notes	SupplierExist	IndCost	SourceTypeDesc	Custc
PR0000007	MAINT	D	SHA001	Belinda	Sharman	07-04-2014		1,500.00		Yes	1,710.00	Work Order	DERO
PR0000311	MAINT	D	DUT001	Bianca	Du Toit	07-10-2016		25.00		Yes	28.50	Warehouse	
PR0000332	MAINT	D	DUT001	Bianca	Du Toit	15-03-2017		30.00		Yes	34.20	Warehouse	HOP0
PR0000333	MAINT	D	DUT001	Bianca	Du Toit	16-03-2017	test	7,000.00	test	Yes	7,980.00	Warehouse	
PR0000340	MAINT	D	DUT001	Bianca	Du Toit	11-04-2017		12.00		Yes	12.00	Warehouse	
PR0000375	MAINT	D	MUD001	Judith	Mudzengi	18-05-2017		809.96		Yes	923.35	Warehouse	HOP0
PR0000402	MAINT	D	MUD001	Judith	Mudzengi	19-05-2017		200.00		Yes	228.00	Warehouse	
PR0000537	MAINT	D	MIL001	Abigail	Milne	07-09-2018		650.00		Yes	732.50	Warehouse	

1. The Approval Matrix frame will expand.
2. Here you can view the authority responsible and the reason for declining the requisition.

**Purchase Requisition Listing - BPO: Version 2.3.0.3 - Example Company**

Home Equipment and Location Contra Finance and H Invento Maintenance and Projec Manufacturi Procureme Sal Servi Reporti Utiliti

Add Edit Delete View Hold Release Approve Decline Save Layout Workspaces Print Export

Durban Declined Refresh

Drag a column header here to group by that column

PRCode	PRTYPE	Status	EmployeeNumber	FirstName	LastName	EventDate	Comments	ExclCost	Notes	SupplierExist	IndCost	SourceTypeDesc	Cust
PR0000007	MAINT	D	SHA001	Belinda	Sharman	07-04-2014		1,500.00		Yes	1,710.00	Work Order	DERO

Approval Matrix

AccessType	CodeDescription	ApprovalCode	Approved	Comment
PROC	General Manager	GNMN	No	cancelled in error

PR0000311	MAINT	D	DUT001	Bianca	Du Toit	07-10-2016		25.00		Yes	28.50	Warehouse	
PR0000332	MAINT	D	DUT001	Bianca	Du Toit	15-03-2017		30.00		Yes	34.20	Warehouse	HOP0
PR0000333	MAINT	D	DUT001	Bianca	Du Toit	16-03-2017	test	7,000.00	test	Yes	7,980.00	Warehouse	HOP0
PR0000340	MAINT	D	DUT001	Bianca	Du Toit	11-04-2017		12.00		Yes	12.00	Warehouse	
PR0000375	MAINT	D	MUD001	Judith	Mudzengi	18-05-2017		809.96		Yes	923.35	Warehouse	HOP0
PR0000402	MAINT	D	MUD001	Judith	Mudzengi	19-05-2017		200.00		Yes	228.00	Warehouse	
PR0000537	MAINT	D	MIL001	Abigail	Milne	07-09-2018		650.00		Yes	732.50	Warehouse	

Open Windows User : AbigailM 03-10-2019 Version : 2.3.0.3 Example Company

MNU.053.002