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.

Ribbon Access: *Procurement > Requisitions*

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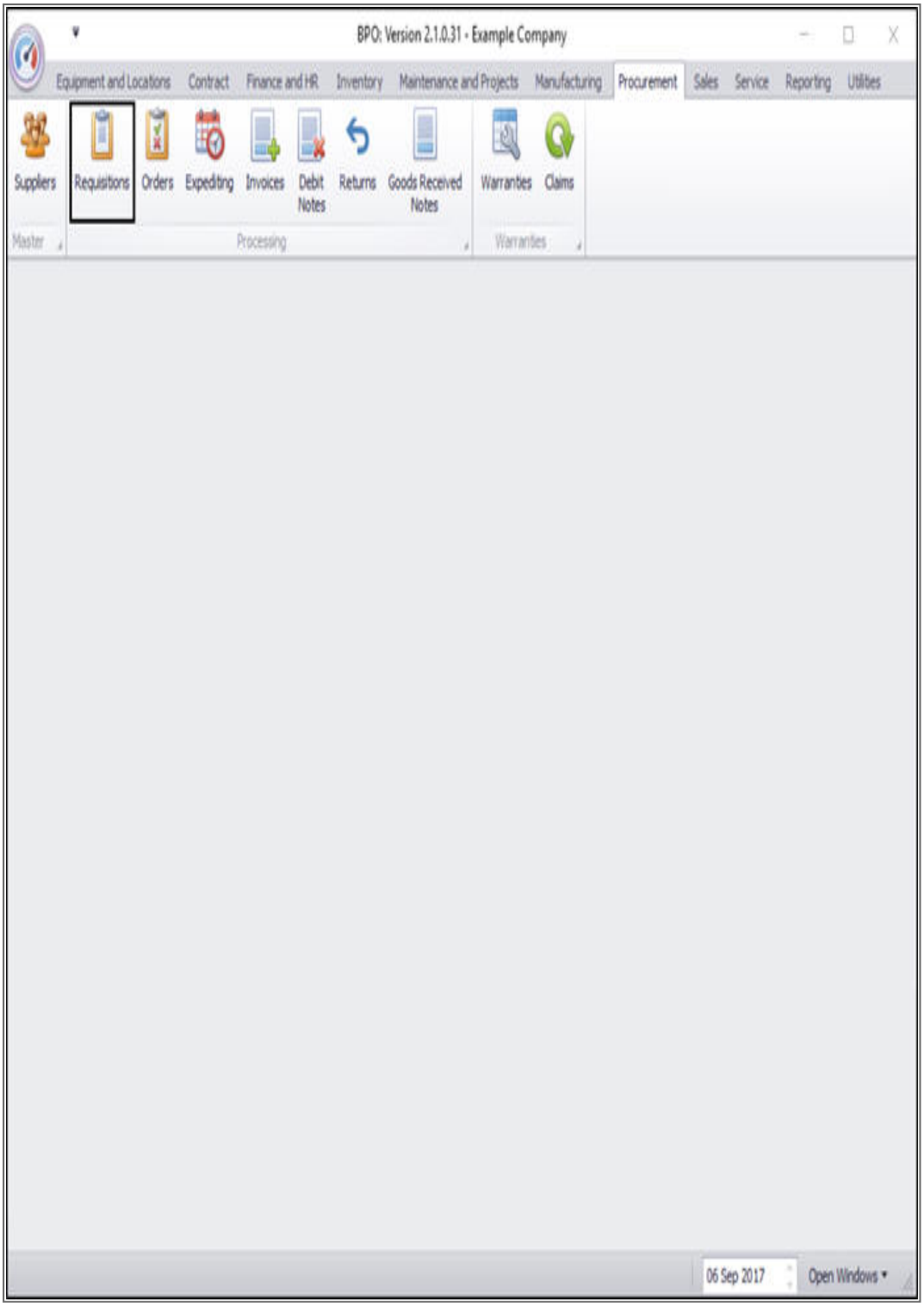

The ***Purchase Requisition Listing*** screen will be displayed.

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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.

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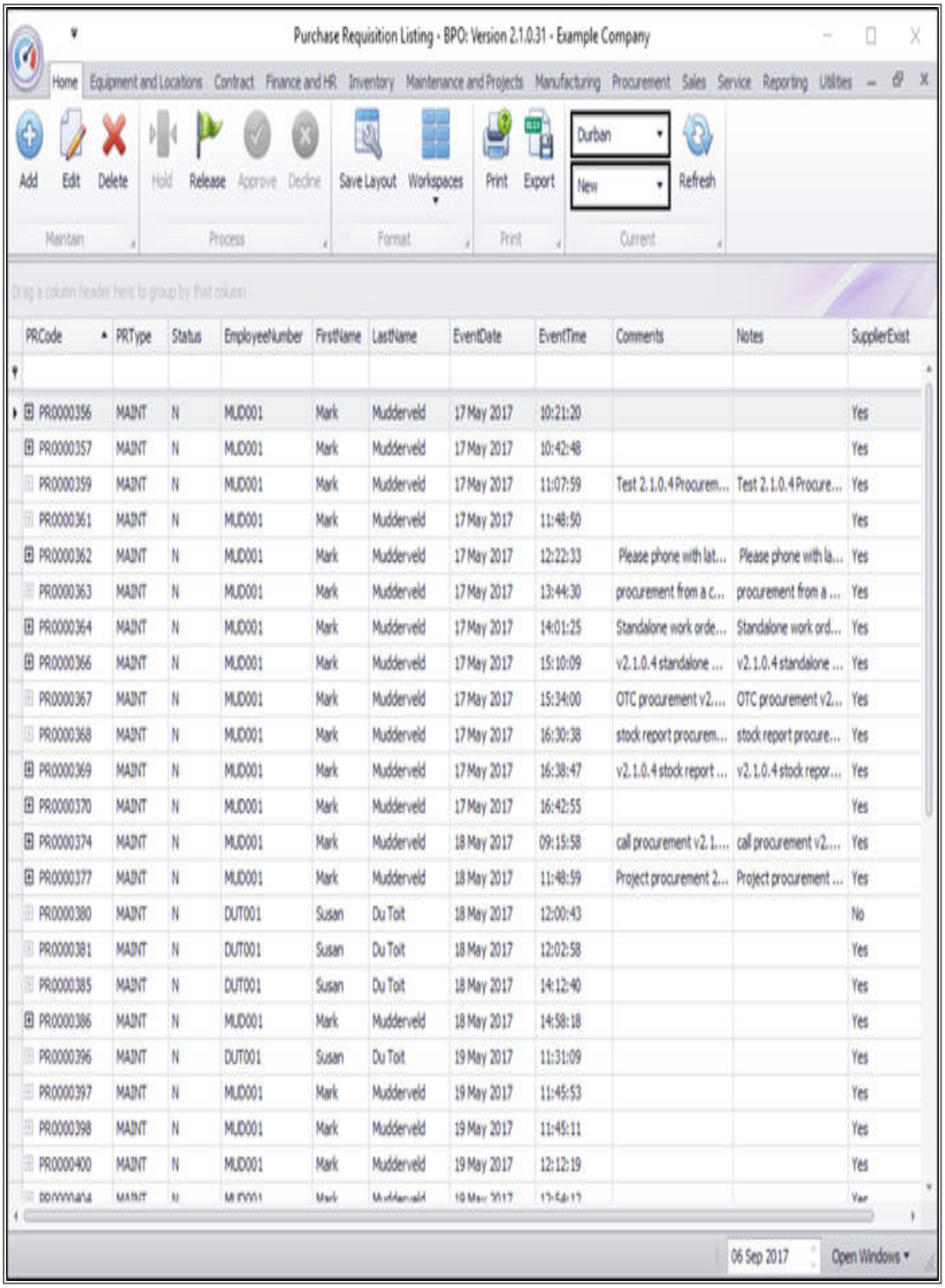

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RELEASE REQUISITION FOR APPROVAL

- 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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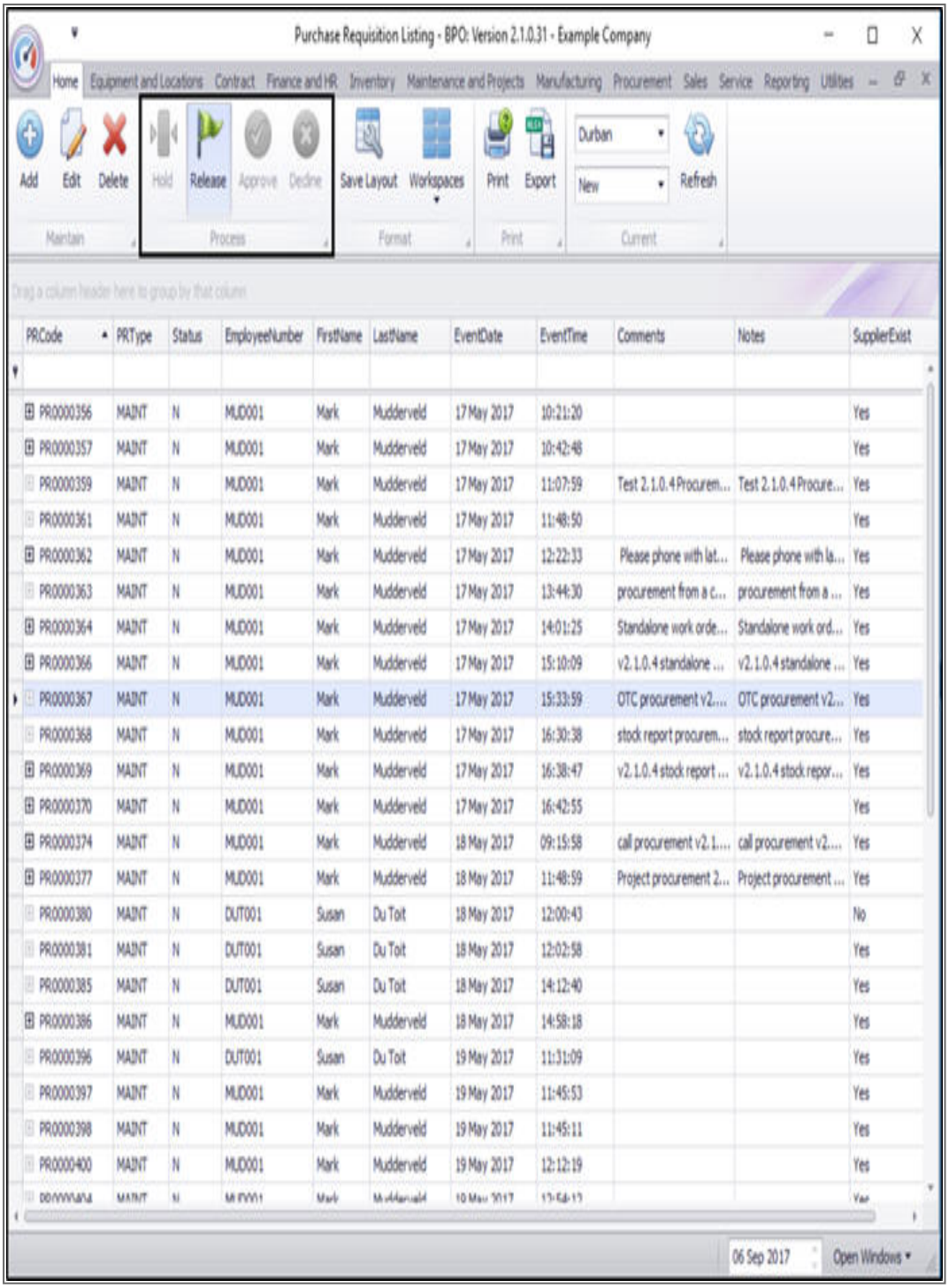

or

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- ***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.

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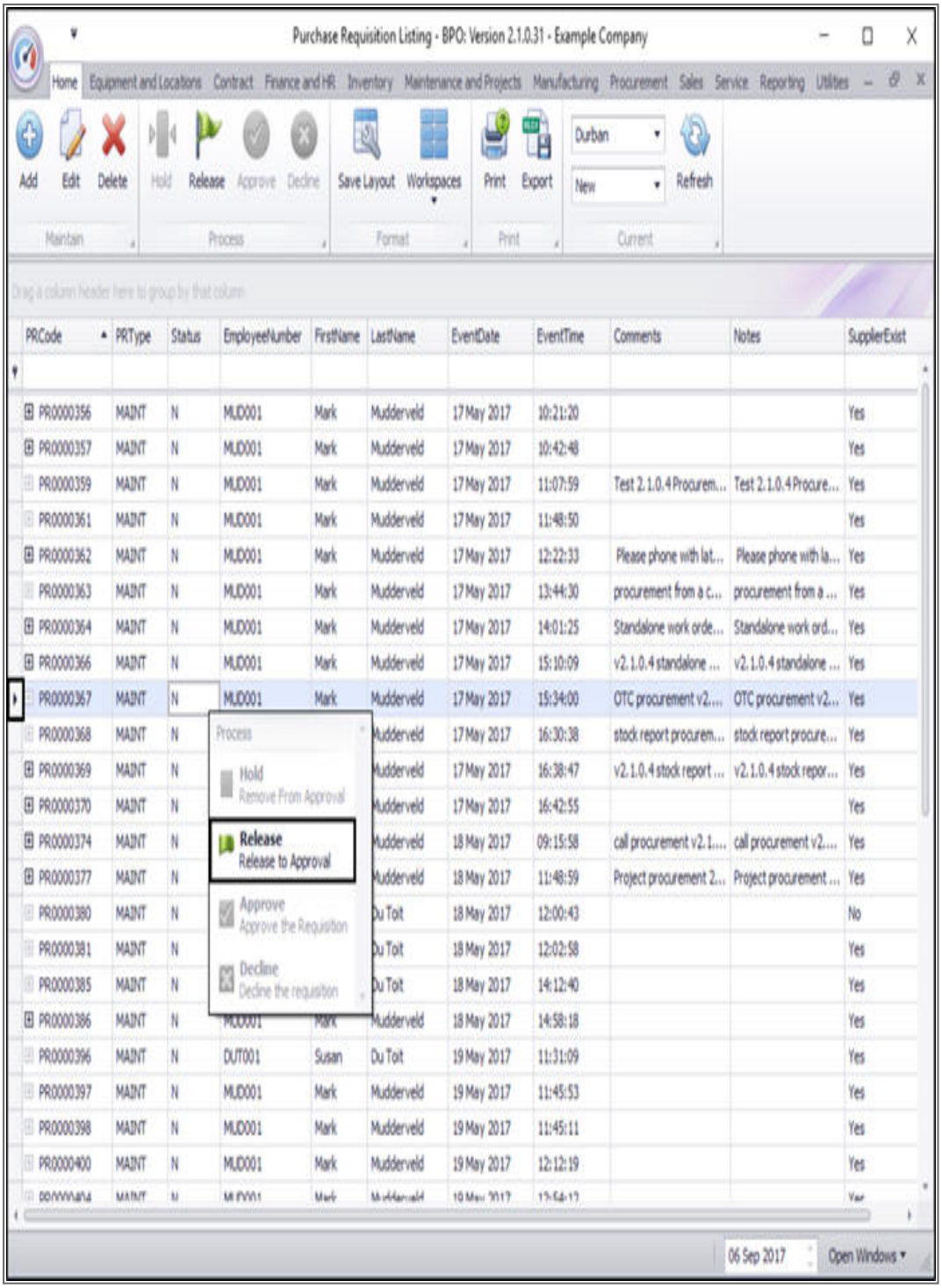

- A ***Requisition Process*** message box will pop up informing you that;

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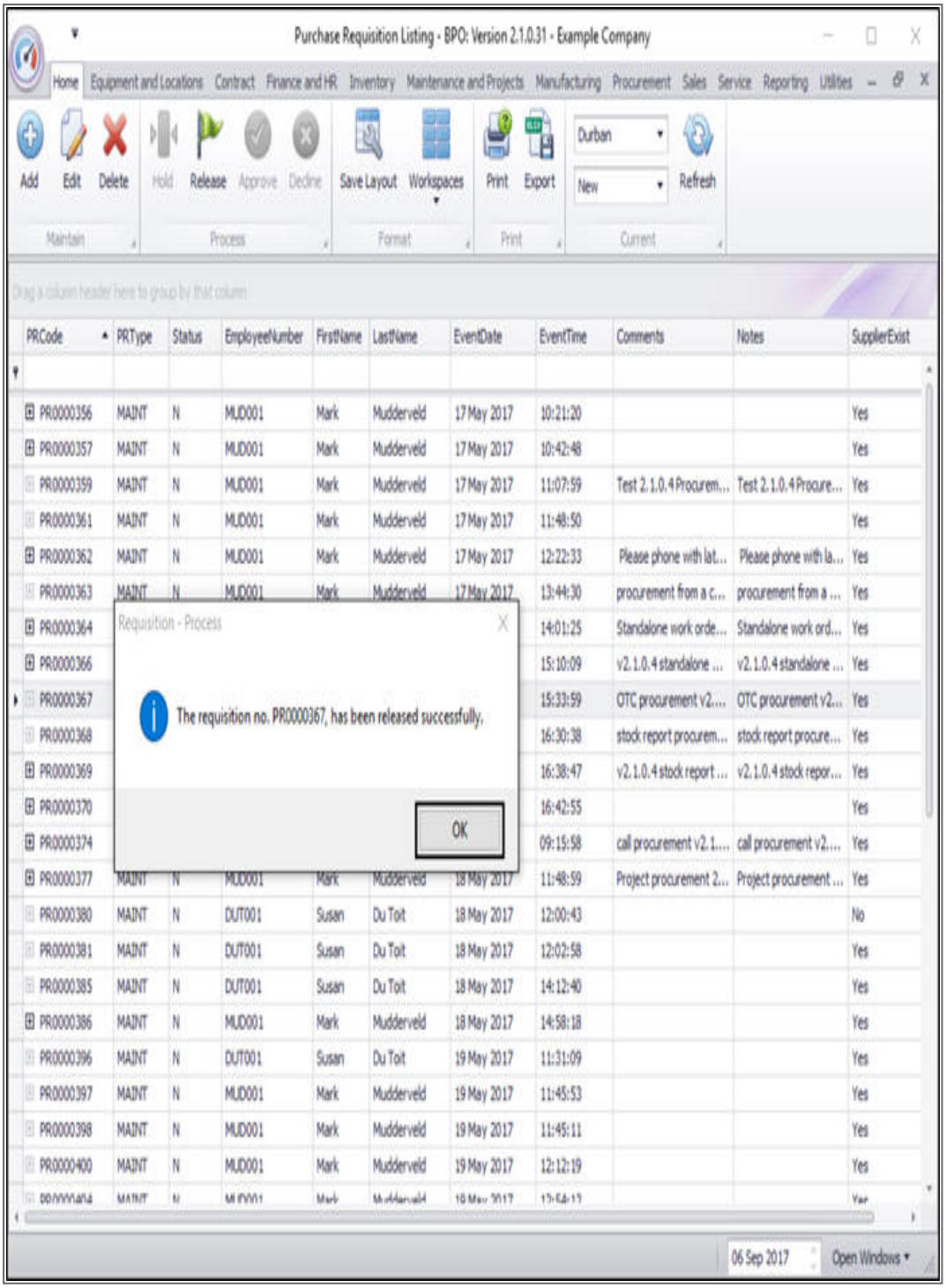
- ***The Requisition no. [] has been released successfully.***

- Click on ***OK***.



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- 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***.

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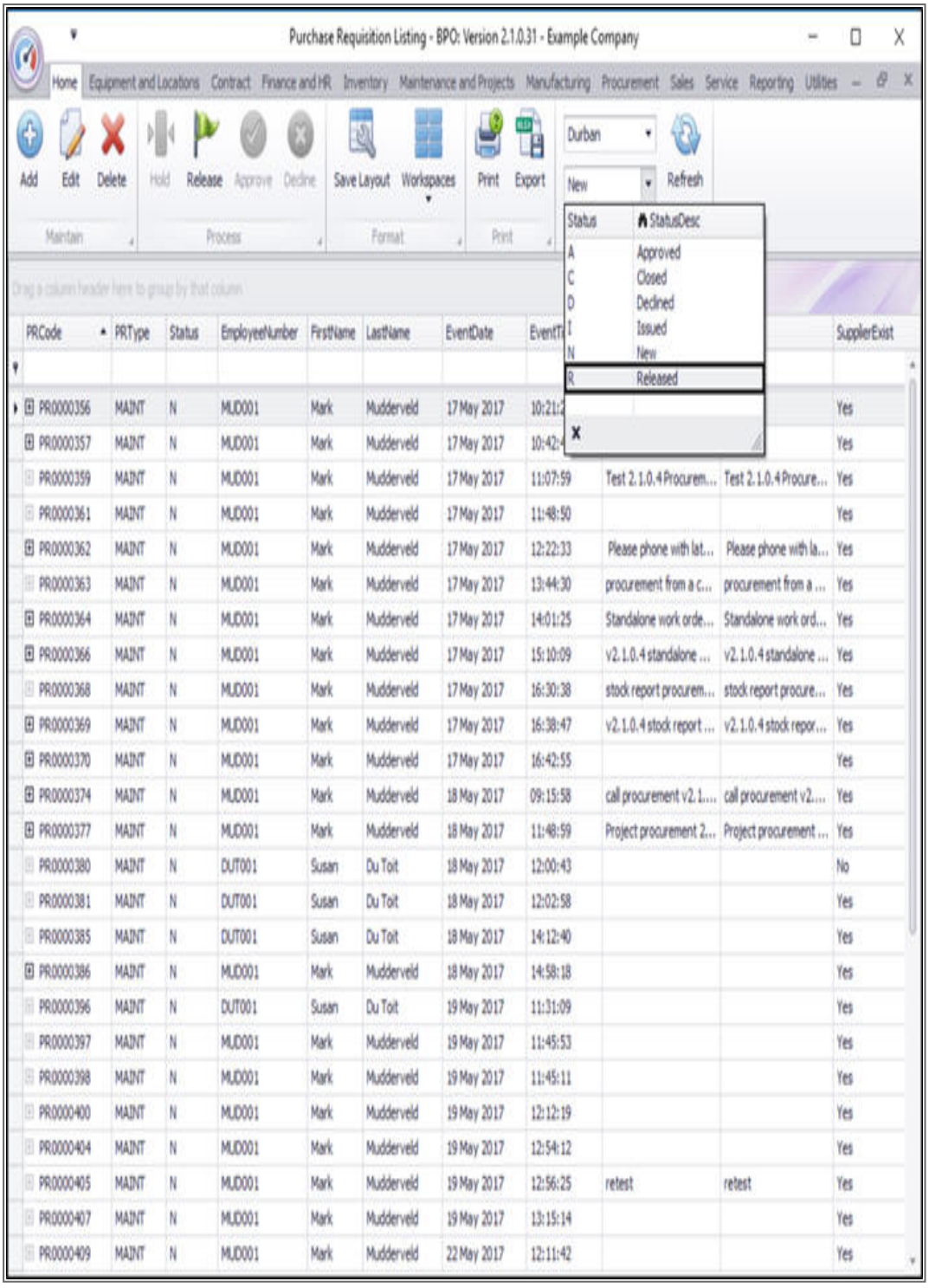

- The ***Purchase Requisition Listing*** screen will now only display the requisitions in the ***Released*** status awaiting ***Approval***.

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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.

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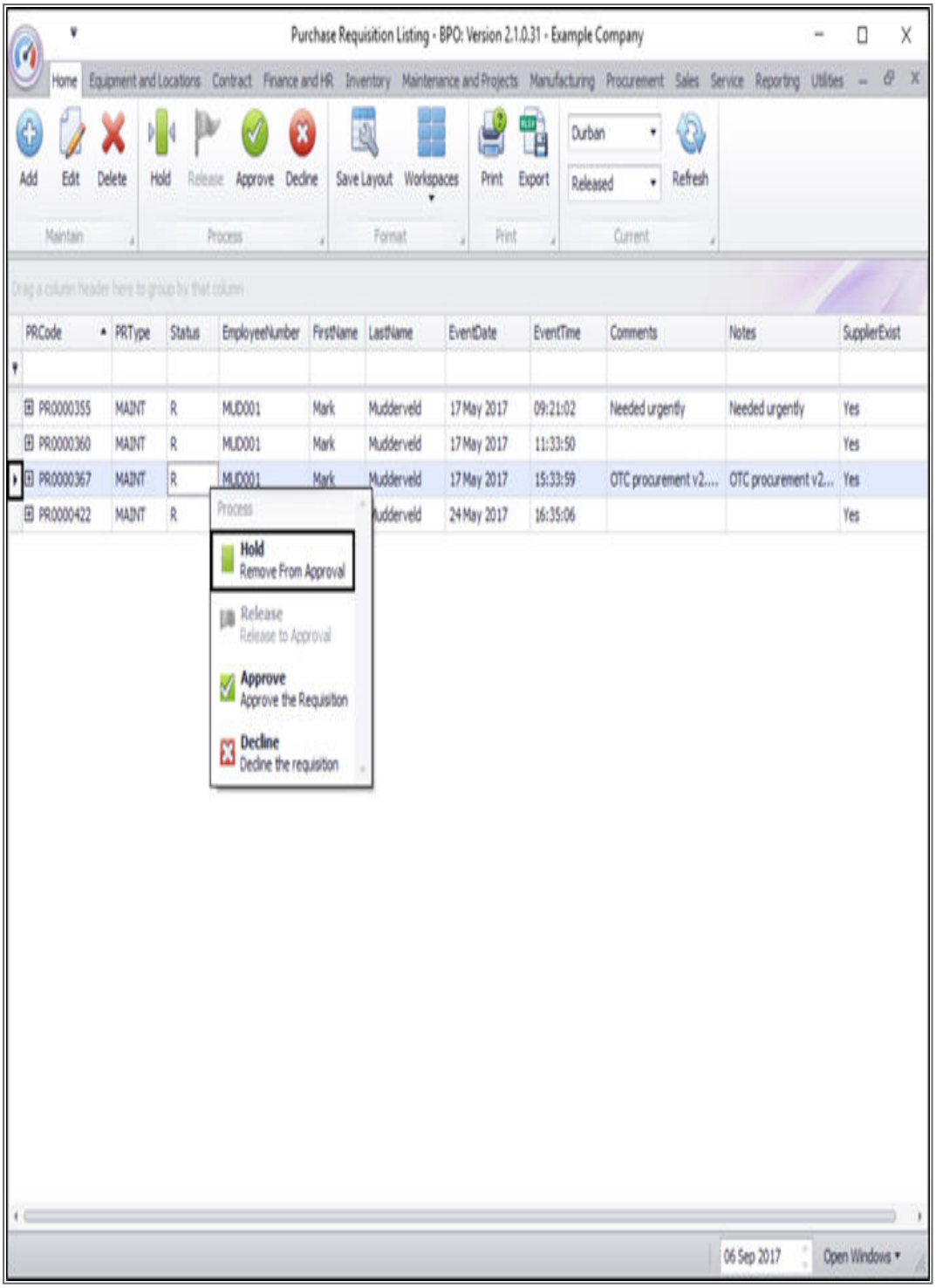

- A ***Requisition - Process*** message box will appear informing you that;

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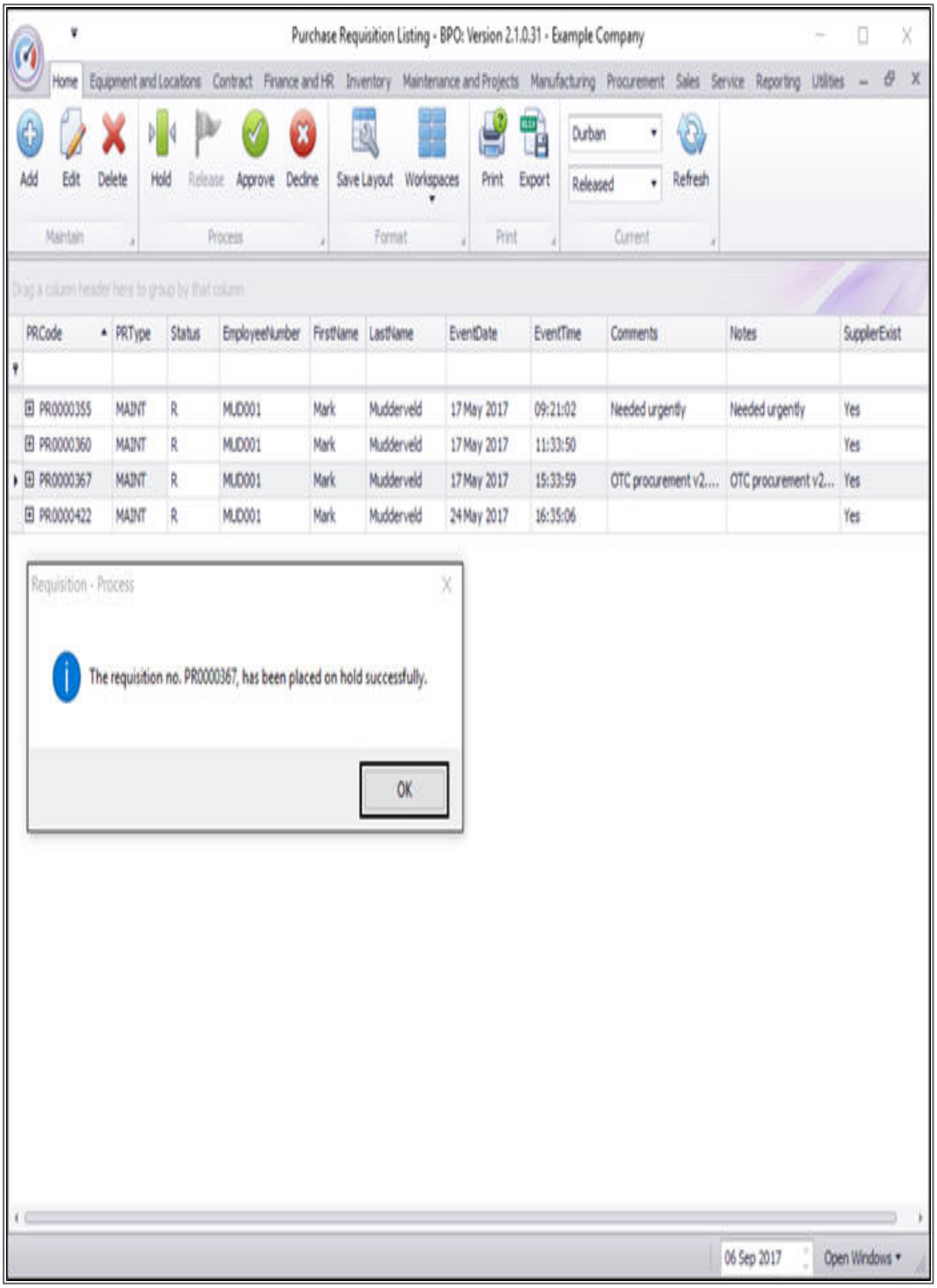
- ***The requisition no. [] has been placed on hold successfully.***

- Click on ***OK***.



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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***.

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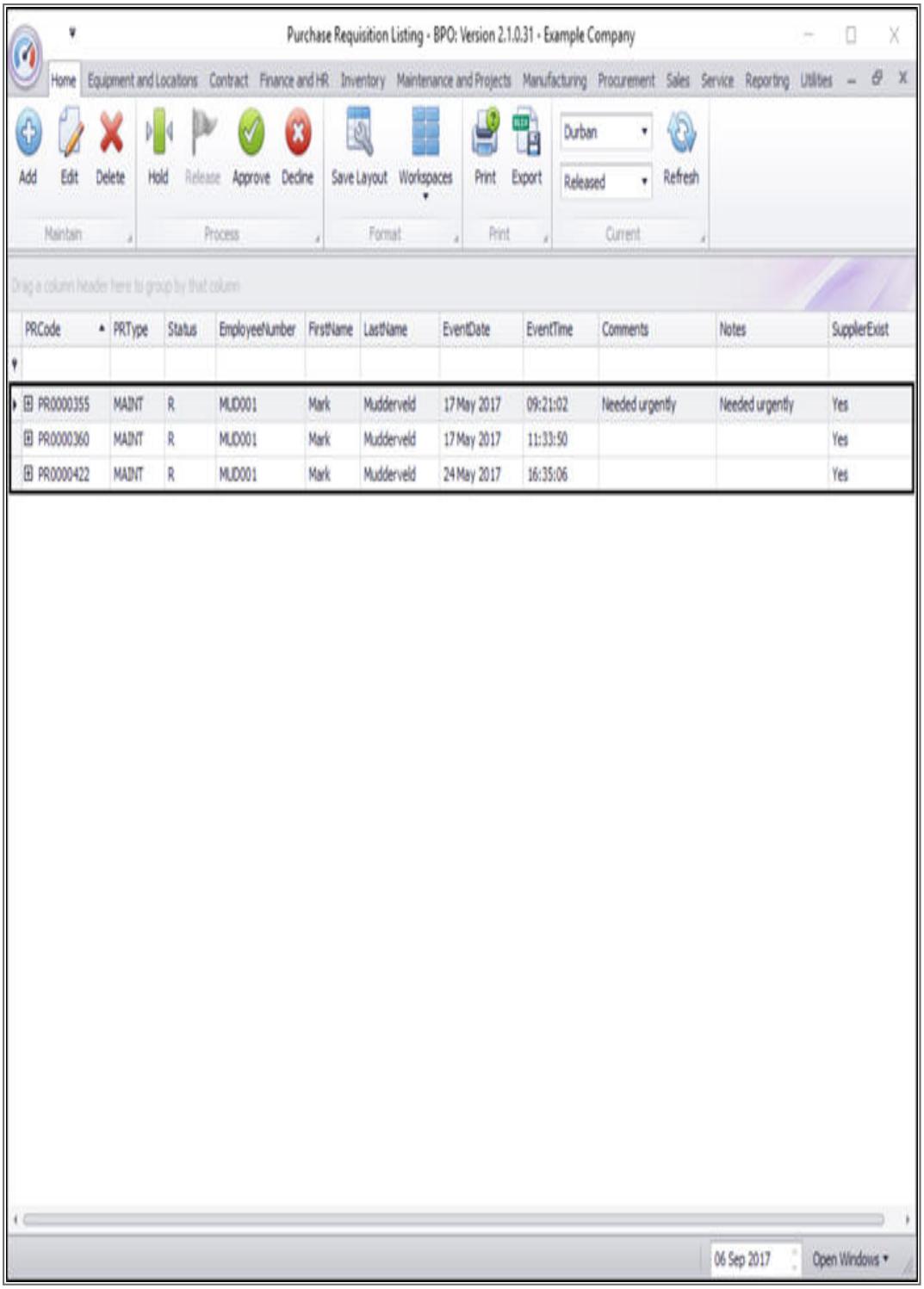

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APPROVE REQUISITION

- 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***.

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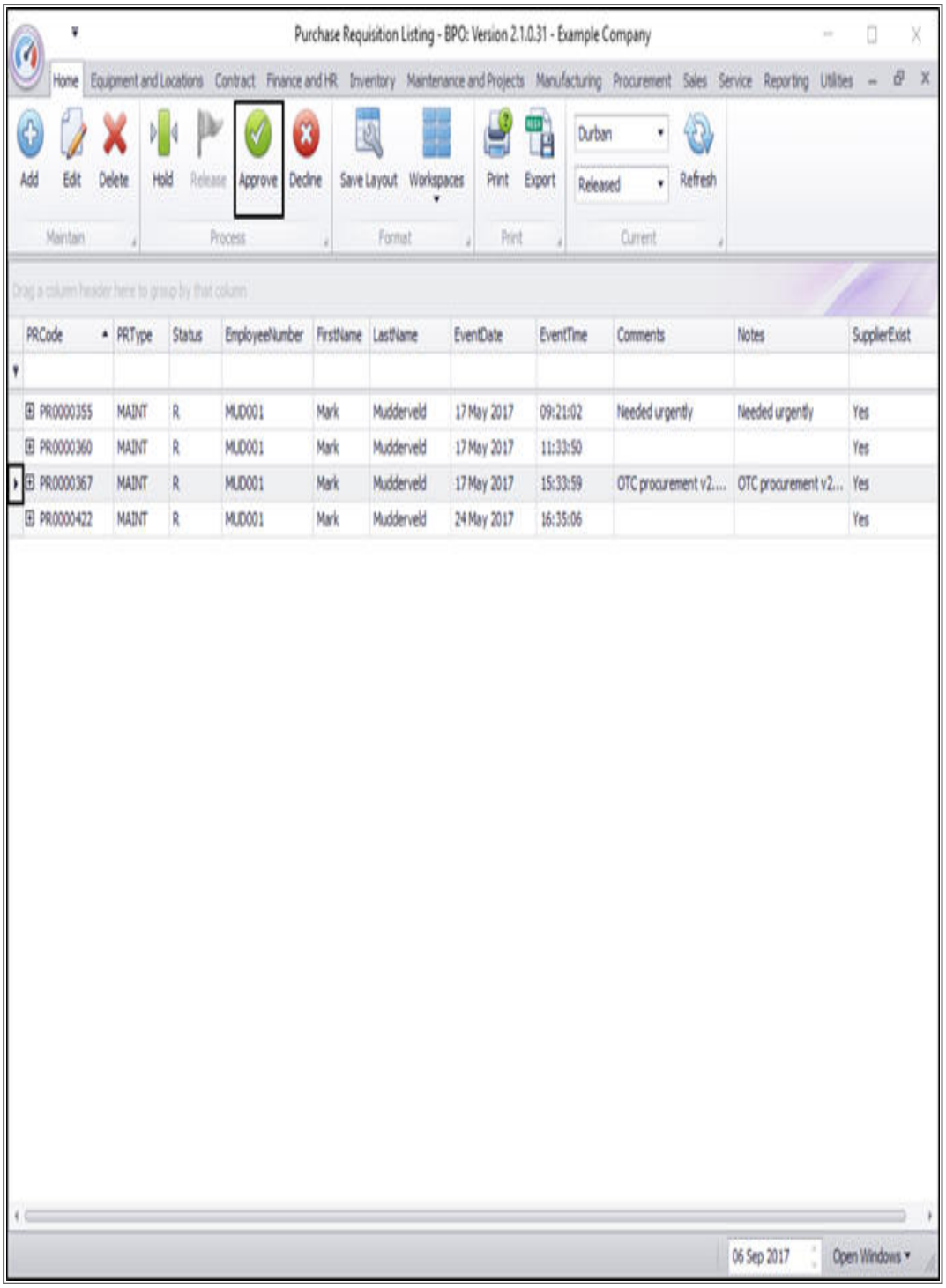

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- A ***Process Validation*** message box will appear asking;
    - ***Are you sure that you want to authorise requisition []?***
- Click on ***Yes***.

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.

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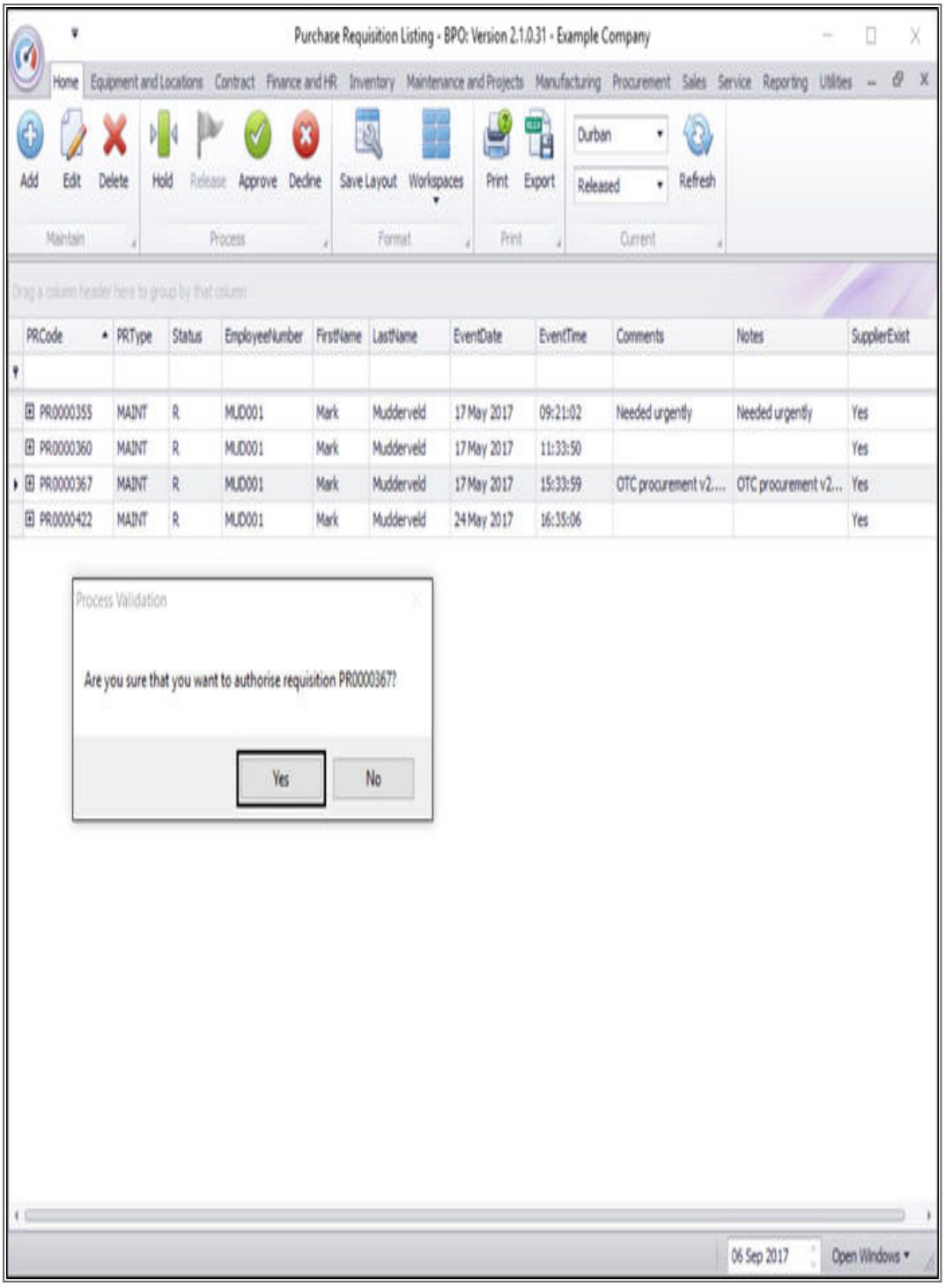

- A ***Requisition - Process*** message box will appear informing you that;

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

- Click on ***OK***.

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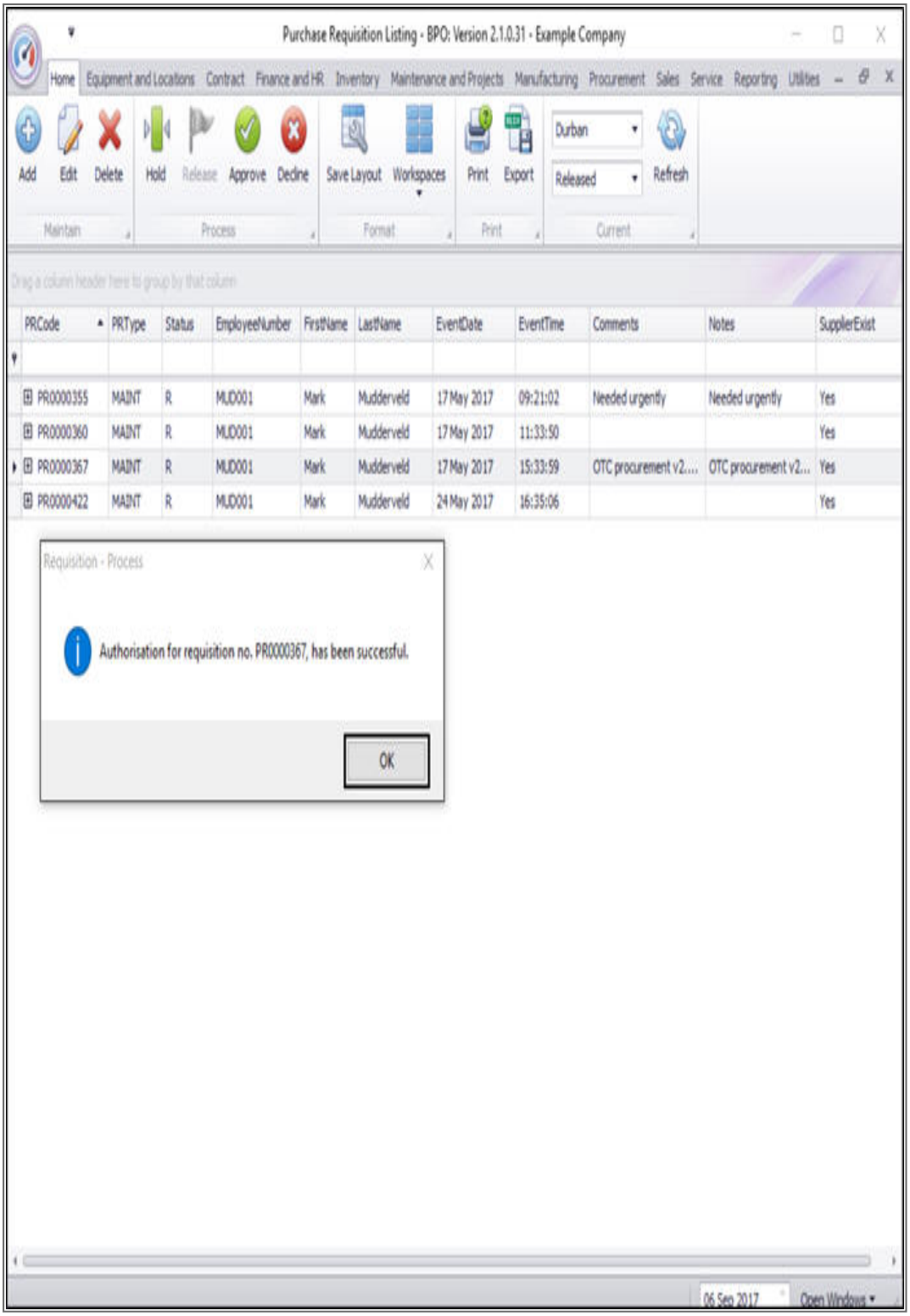

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VIEW SYSTEM GENERATED PURCHASE ORDER

- 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*

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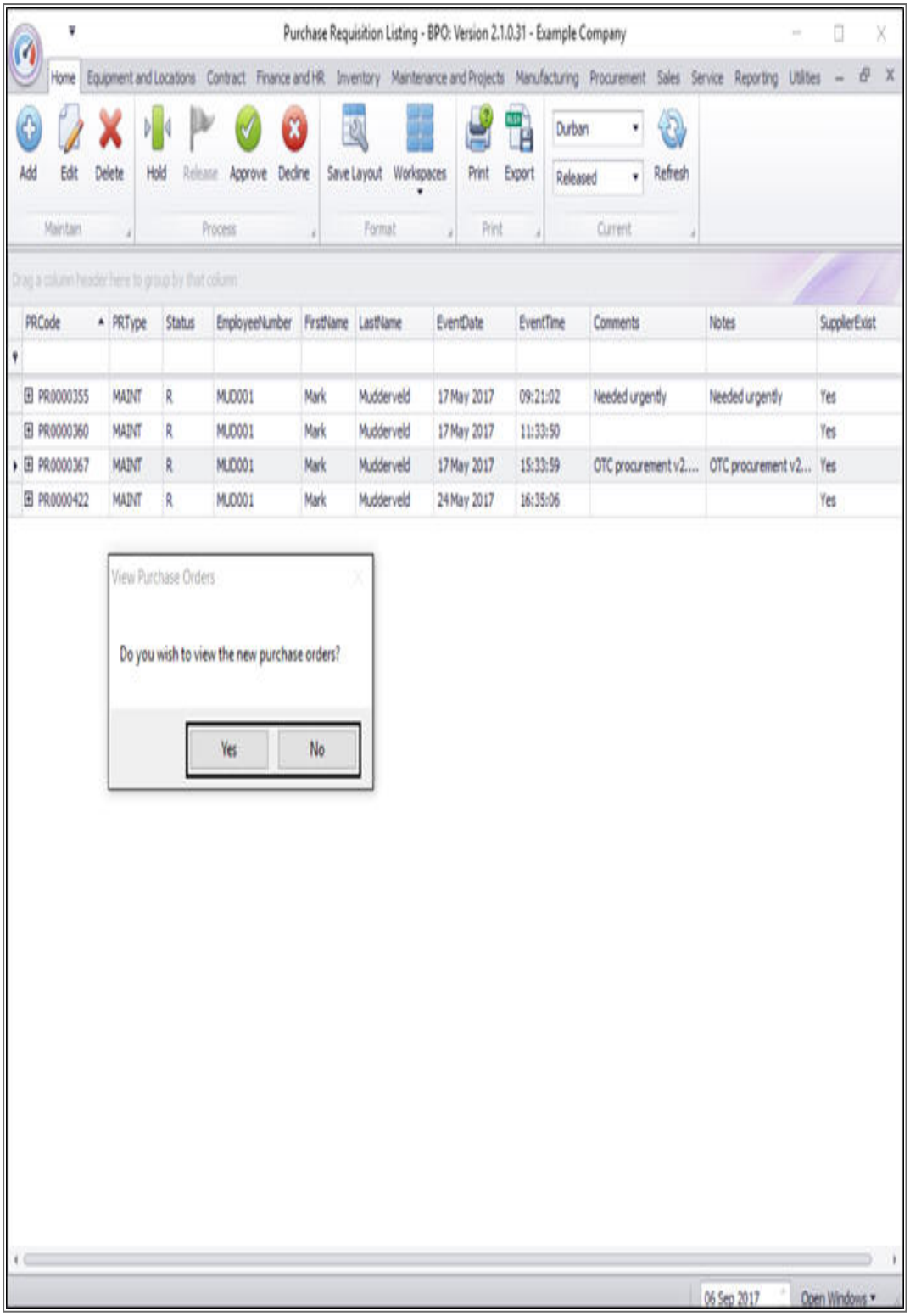

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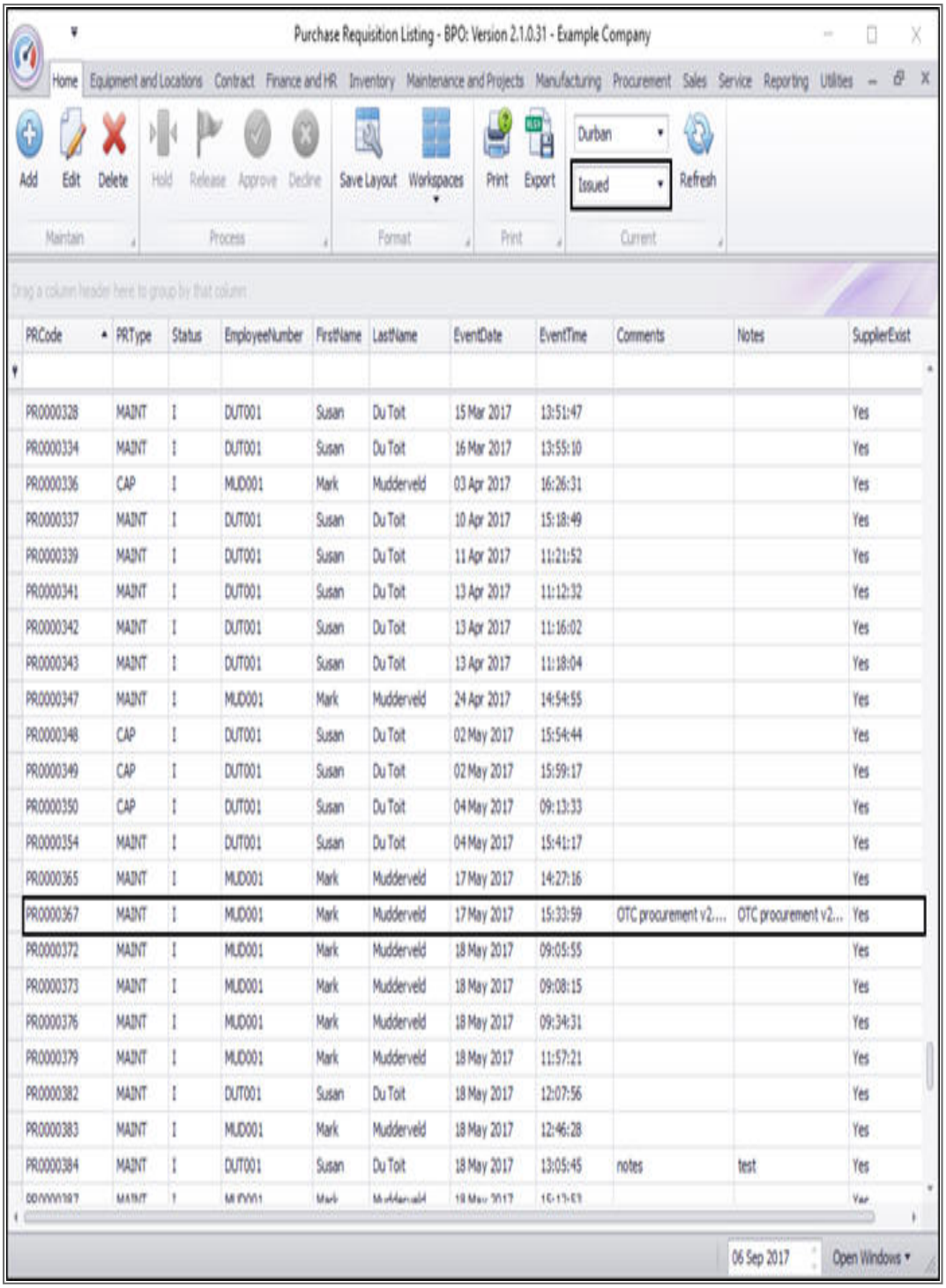
- To view the approved requisition, change the status in the Purchase Requisition Listing screen to ***Issued***.
- The approved requisition is now displayed in this listing screen.



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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***.

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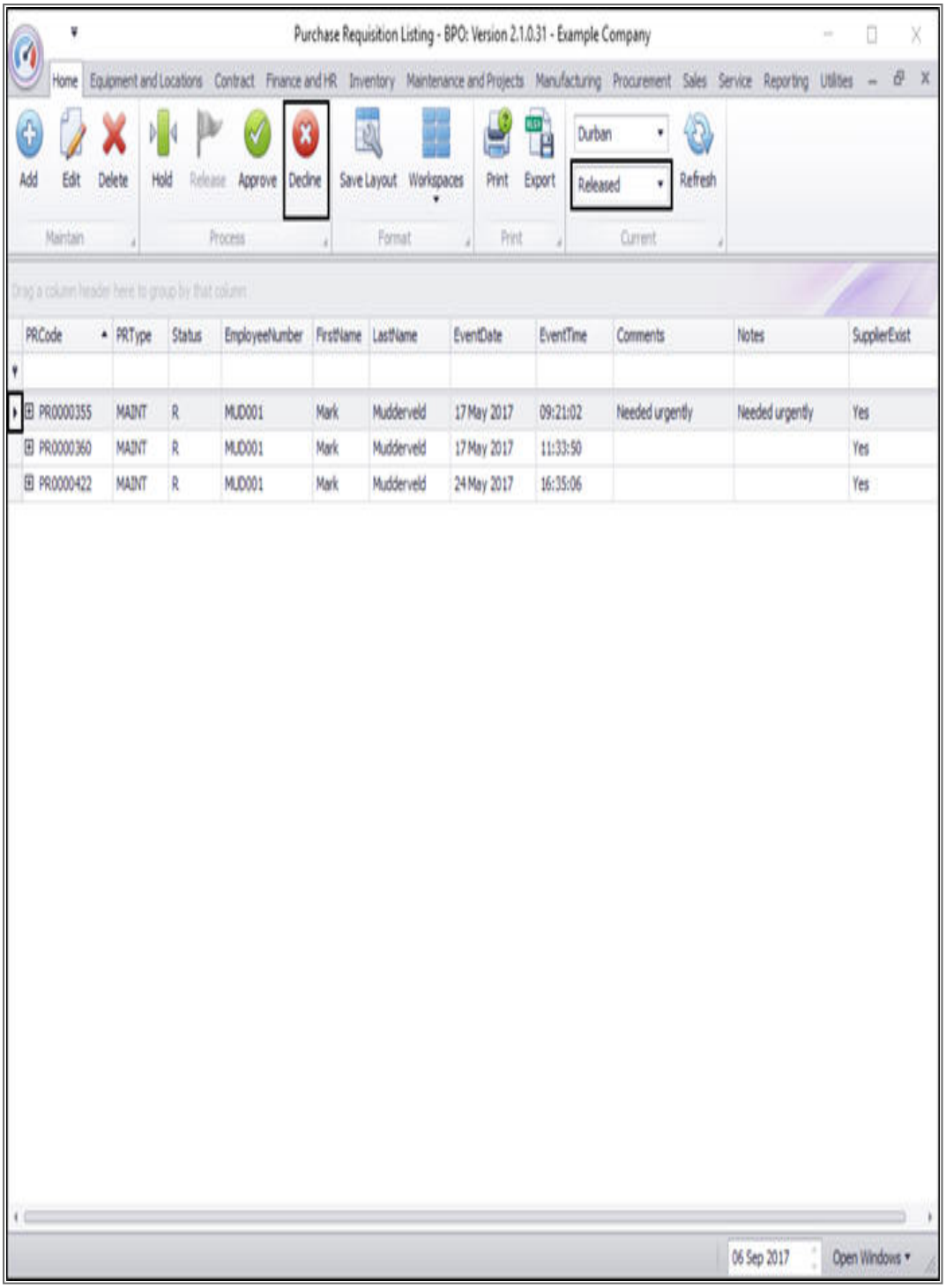

- A ***Process Validation*** message box will appear, asking;
  - ***Are you sure that you want to decline requisition []?***

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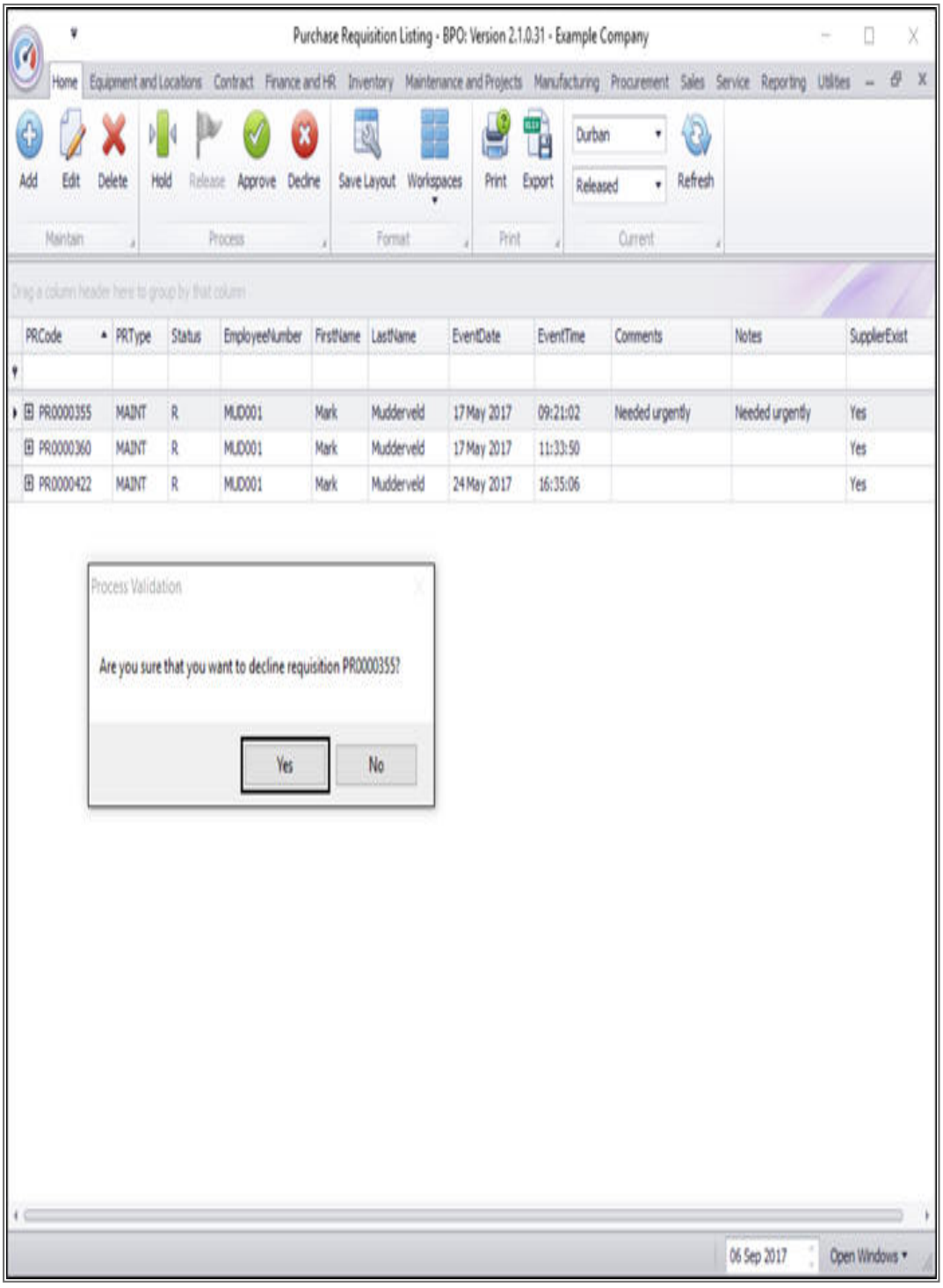
- Click on ***Yes***.



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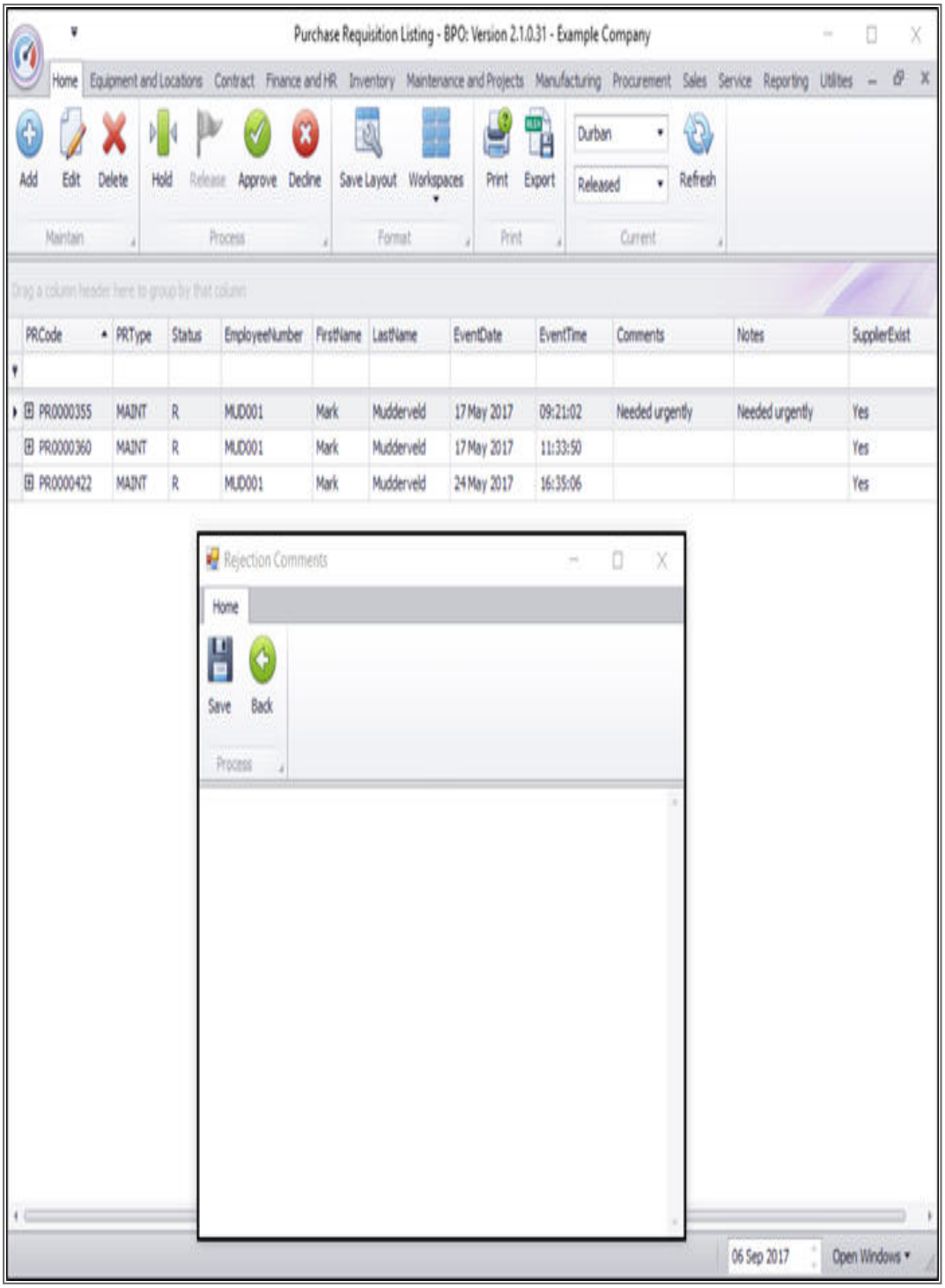
DECLINE / REJECTION COMMENTS

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



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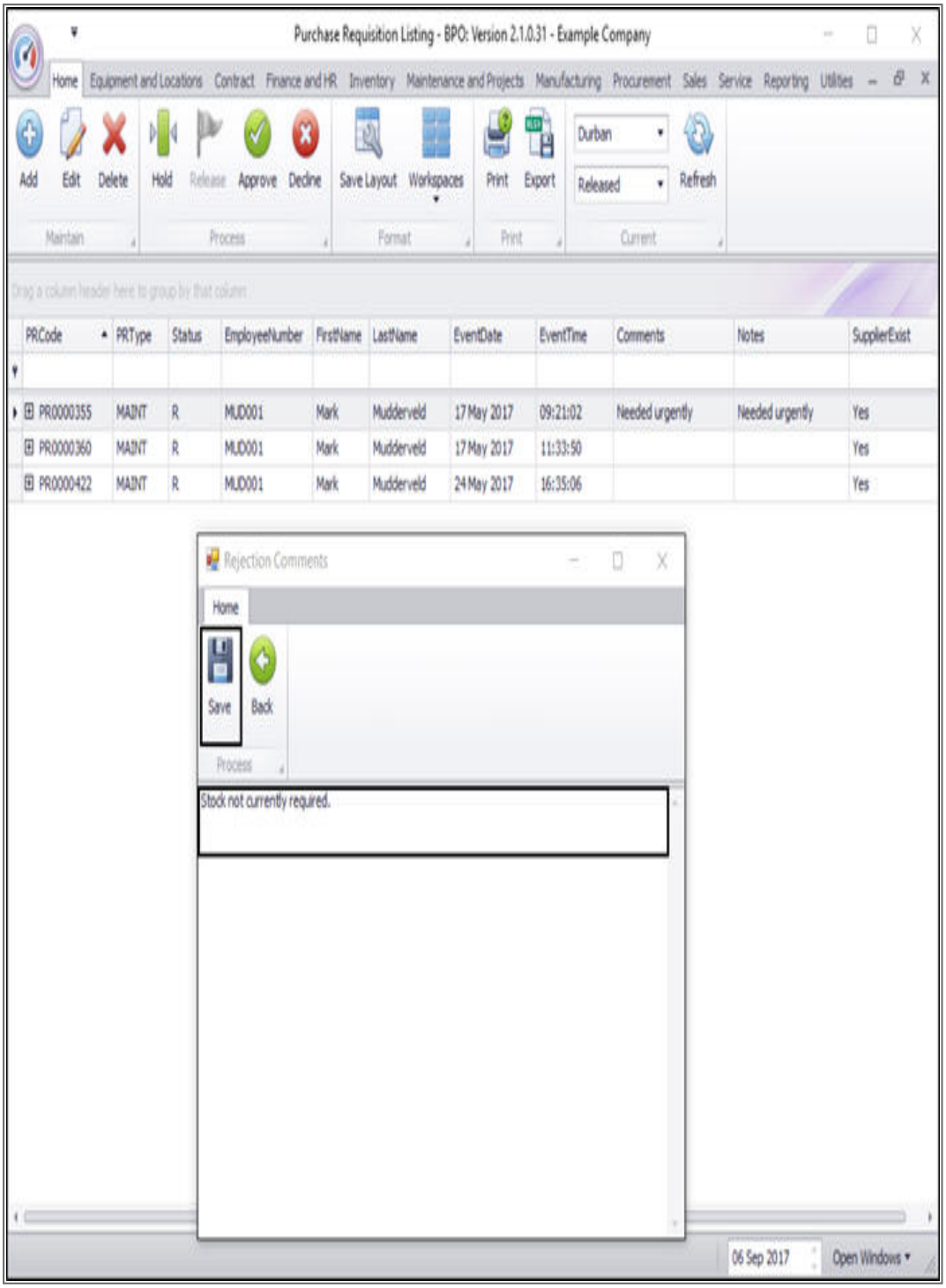
- Type in any ***Rejection Comments*** concerning this requisition.
- Click on ***Save***.



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

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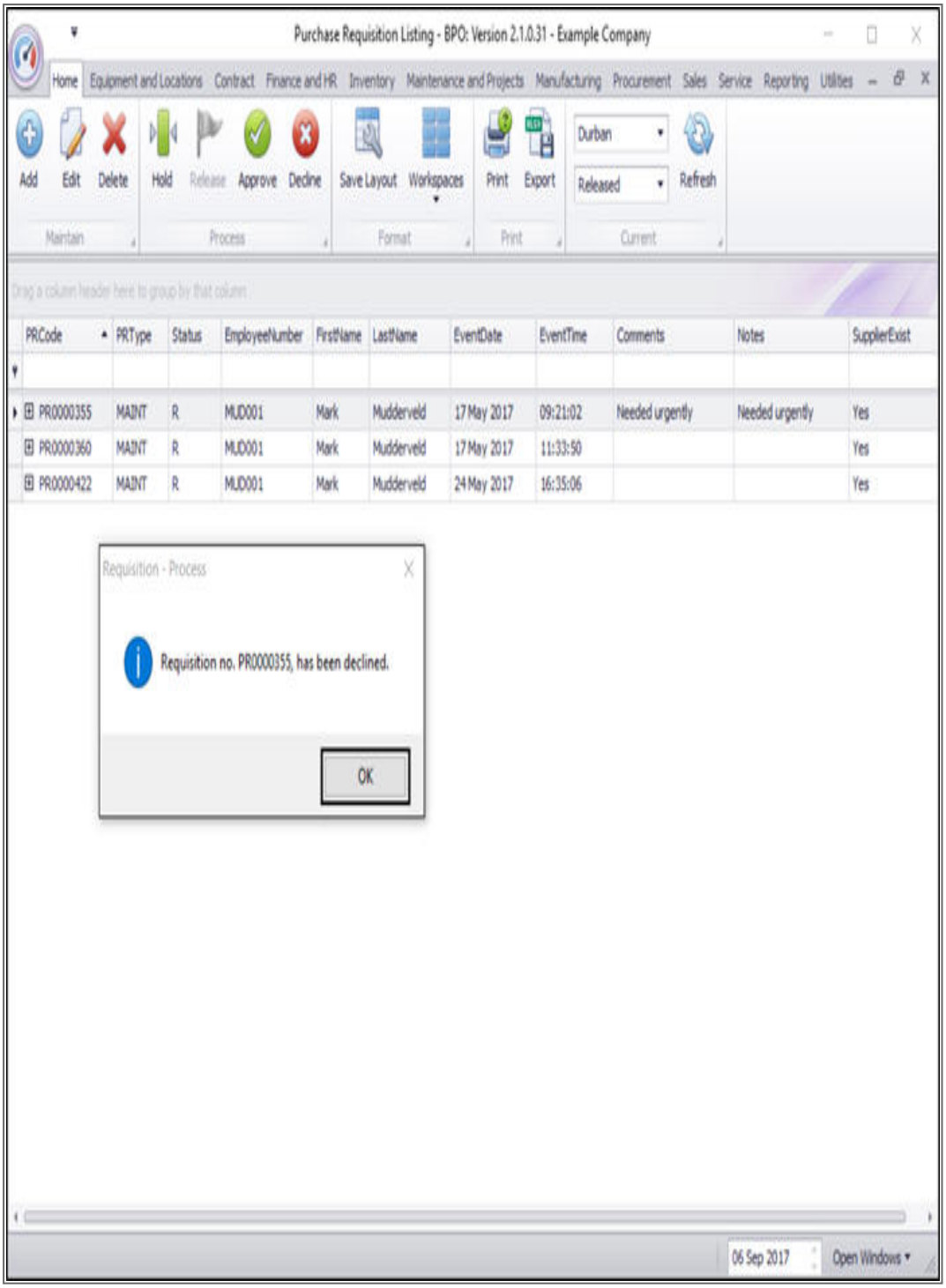

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VIEW DECLINED REQUISITION STATUS

- 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.

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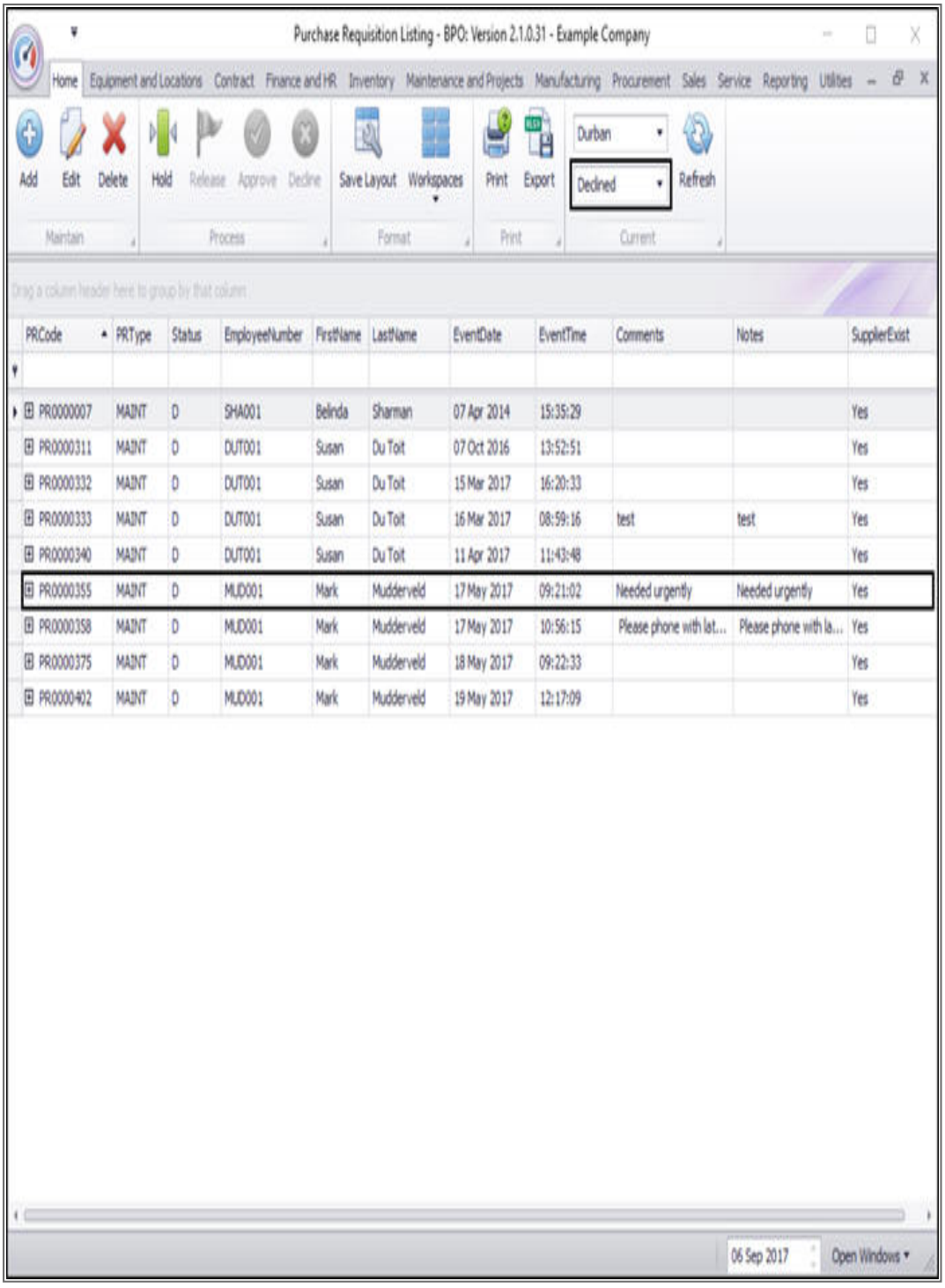

VIEW DECLINED REQUISITION REASON

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

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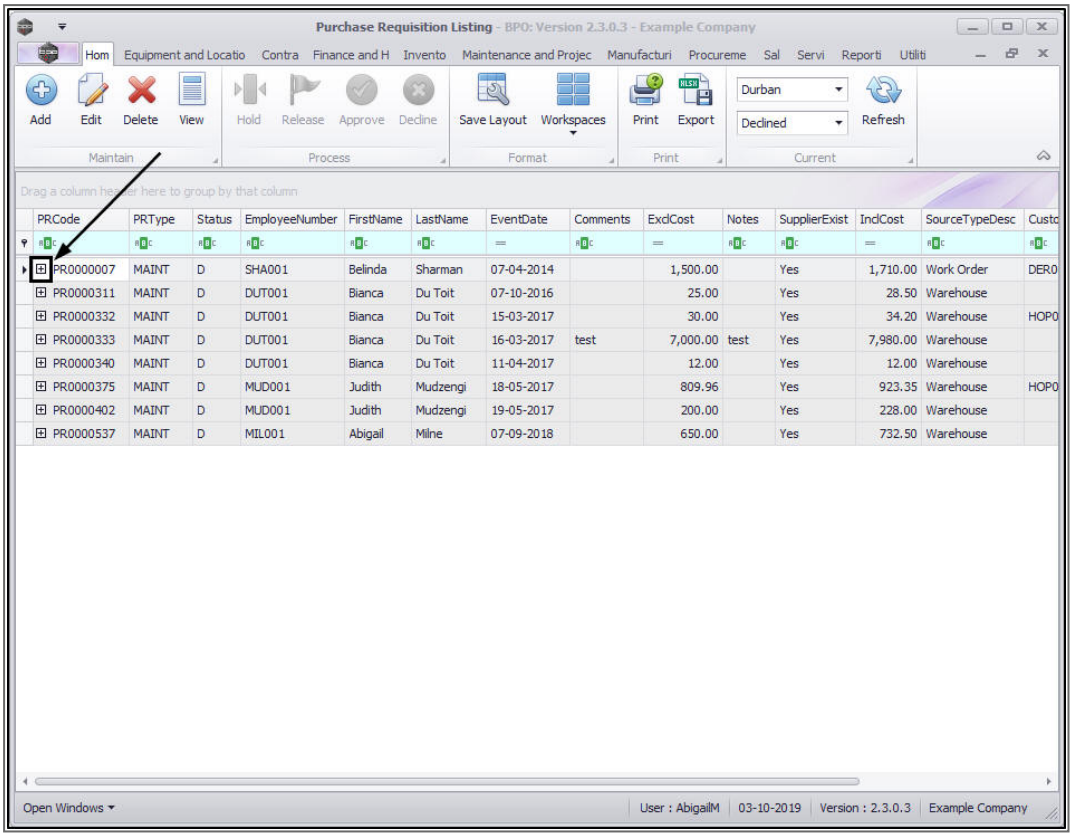
- Click on the expand icon in front of a selected requisition.



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

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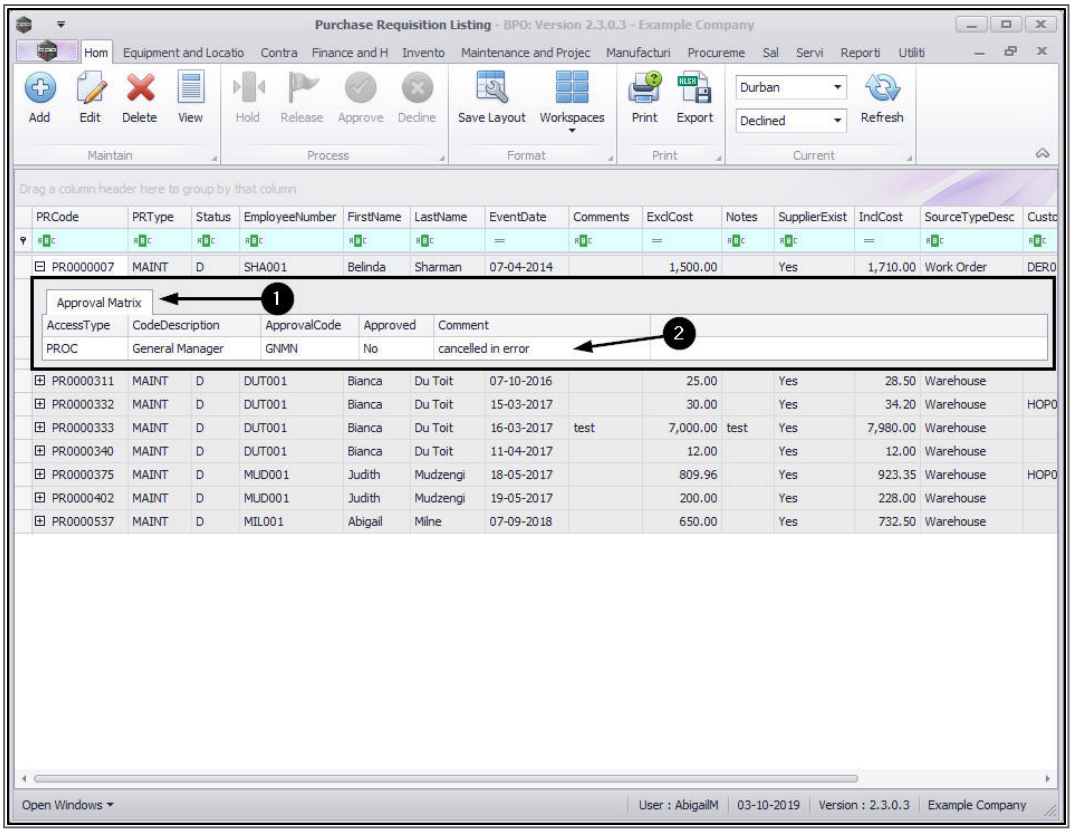

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