Budget Holder Tasks: Approving a Requisition

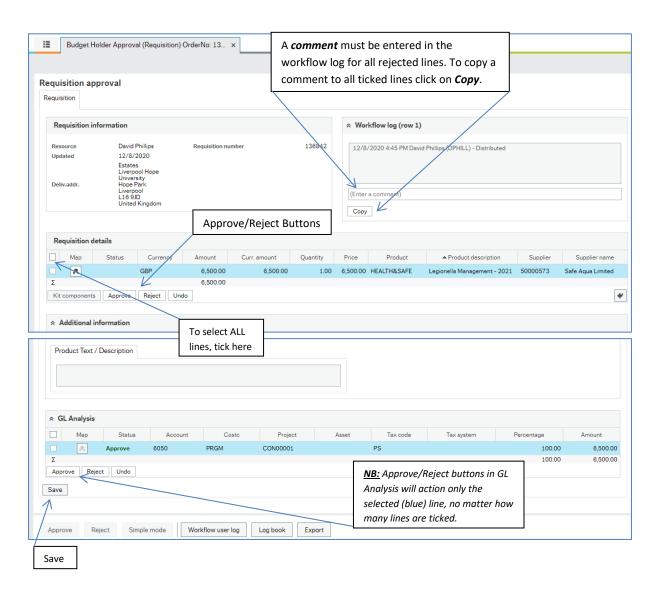Tasks can be found in the top right corner of the screen:

When you click on the Tick, a list of outstanding tasks will be displayed. This example shows the user has three tasks to action.

A requisition awaiting approval will show as *Budget holder Approval (Requisition) OrderNo: XXXXXX*

Click on the task to view the requisition.

Budget Holder Approval (Requisition) OrderNo: 136842

A *comment* must be entered in the workflow log for all rejected lines. To copy a comment to all ticked lines click on *Copy*.

Approve/Reject Buttons

To select ALL lines, tick here

NB: Approve/Reject buttons in GL Analysis will action only the selected (blue) line, no matter how many lines are ticked.

Save

Approve / Reject: Select the line(s) to be actioned and click approve or reject button as required.

Only the highlighted line (blue) will be actioned unless you select multiple lines using the boxes to the left of the lines, before clicking on Approve or Reject.

Any rejected requisition lines will be returned to the administrator for them to amend and resubmit or reject. A PO will not be generated until all lines have been actioned.