

## Approvals: Requisitions, Purchase Orders, & Change Orders – Section 7.0

This process is for approving procurement documents over \$25.00:

- PunchOut
- Non-Catalog
- Smart Forms



Procurement Changes for:

- Increases by \$25.00 or 10%

Audience: Budget Managers & P.I.s

Additional Resources:

- Video (where applicable – insert link)
- Help Text (where applicable – insert link)
- GMHEC Website (where applicable – insert link)
- cheryl.foster@gmhec.org

Process Step & Description	Action
<p><b>7.1 Approve Requisition, Purchase Order, or Change Order</b></p>	<p>Navigation Path:</p> <ul style="list-style-type: none"> <li>➤ Oracle Home Page → Any Tab</li> <li>➤ Email</li> </ul> <div style="border: 1px solid gray; border-radius: 10px; padding: 5px; width: fit-content; margin: 10px auto;"> <p><b>Quick Tip!</b> Remember to enable your pop-ups for use in Oracle.</p> </div> <p>You can approve requisitions, purchase orders, and change orders via Oracle or your email. For Oracle, go to your home page. Click on your notifications:</p>  <p>A pop-up will appear.</p> <p>Options:</p> <ol style="list-style-type: none"> <li>Click on the approve button as shown in the pop-up. Here you can approve immediately from the notifications window.</li> </ol> 

2. Review the document by clicking on the requisition link in the pop-up.

Actions ▼ Approve Reject

⚠ Funds check upon submission has warnings. View requisition details and check funds to review the warning details.

▾ Details

<p><b>Assignee</b> Cheryl Foster</p> <p><b>From</b> Katherine Shuler</p> <p><b>Assigned Date</b> 11-Feb-2019 8:22 PM</p> <p><b>Task Number</b> 211863</p>	<p><b>Requisitioning BU</b> GMHEC BU</p> <p><b>Entered By</b> Katherine Shuler (Katherine Shuler)</p> <p><b>Requisition Amount</b> 1,000.00 USD</p> <p><b>Nonrecoverable Tax</b> 0.00 USD</p> <p><b>Approval Amount</b> 1,000.00 USD</p> <p><b>Funds Status</b> <span style="color: orange;">⚠</span> Funds check upon submission has warnings.</p> <p><b>Description</b> Internet streaming services</p> <p><b>Justification</b></p>
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Click on the Approve or Reject button in the top right corner of the screen when ready.

The requester will receive notice that their document has been approved.

To approve via email, review information in the body of the email. Reject or approve by clicking either icon.

Boomerang

Action Required: Approve Requisition GM-REQ-1276 Inbox x

Katherine Shuler (Katherine Shuler) <egqw-test.fa.sender@workflow.mail.us2.cloud.oracle.com> 8:17 PM (16 minutes ago) ☆ ↶ ⋮

to me ▾

Approval Amount: \$700.00  
 Requester: Katherine Shuler (Katherine Shuler)  
 Floral Arrangements

⚠ Funds check passed with warning.

✔ Approve ✘ Reject

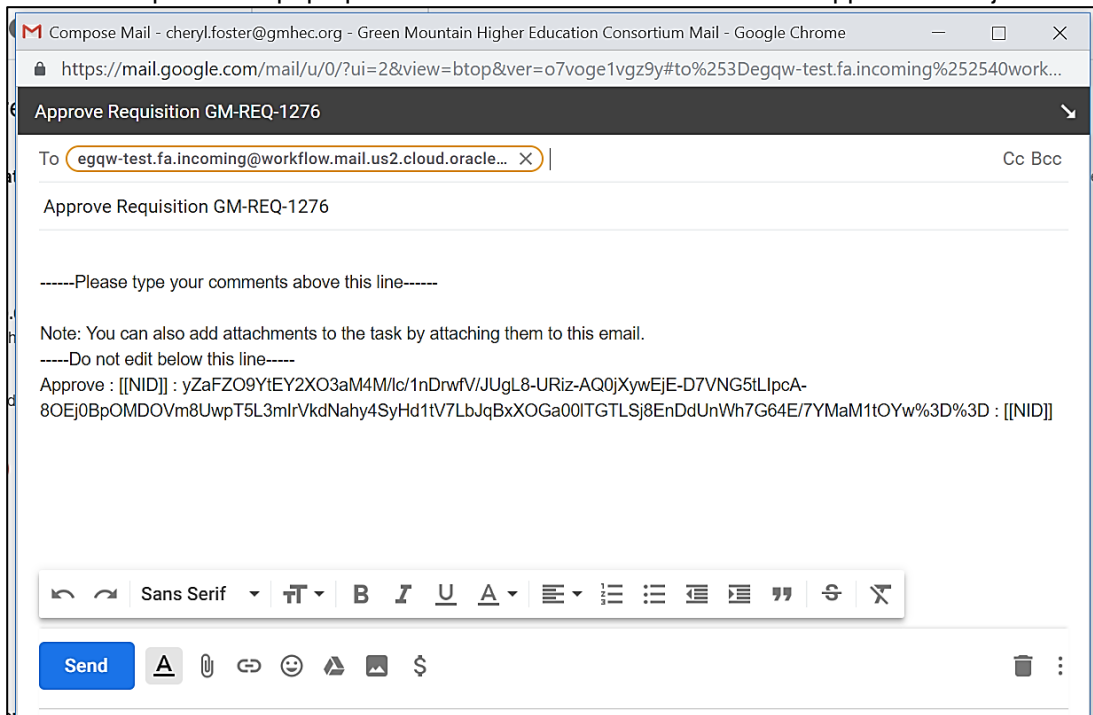
Lines

**Floral Arrangements**  
 Cost Center: 1100  
 10 x \$70.00 / EA \$700.00

**Action History**

Approval request submitted  
 11-Feb-2019 8:17:00 PM

An email response will pop-up. Hit send and the document has been approved or rejected.

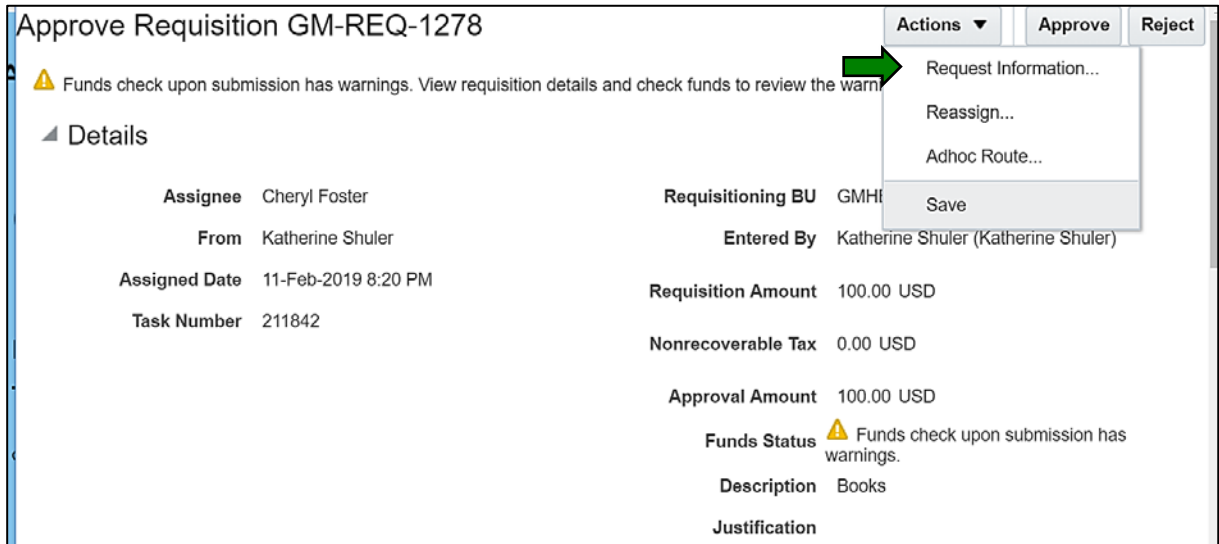


**Important Note:**  
If you choose to approve requisitions via email, the notifications in Oracle will not be removed even though the requisition has already been approved.

**7.2 Send back a Requisition**

Navigation Path:  
➤ Oracle Home Page → Any Tab

In your notifications, open up requisition needing approval. Go to “Actions” and choose “Request Information”:



A pop-up will appear where you can add comments in the field below. Add your text and hit “OK”

**Request More Information** ✕

From  Participant  ▼

Other users  🔍

Comments: 

Please provide more detail for your request!

Return Options  Route directly back to me

Require subsequent participants to retake action

The requisition has now been returned back to the requester for more information. In Oracle, requester can:

- Comment back in Oracle
- Withdraw & Edit

Once the requester resubmits their requisition, you will receive another notification requesting approval. Open the requisition as you did before under your notifications, and you will see it returned with comments:

**Comments** +

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31-Jan-2019 4:53 PM cheryl.foster@gmhec.org  
Needed for large-scale project

31-Jan-2019 4:29 PM corinna.noelke@gmhec.org  
Please provide more detail for your request.

You can approve, reject, or return again if needed.

▼

<b>7.3 Managing Your Notifications</b>	<p>Should you decide that you would like to create email rules due to Oracle notifications, please see the links below instructing you how</p> <p>Outlook Email Rules <a href="https://support.office.com/en-us/article/manage-email-messages-by-using-rules-c24f5dea-9465-4df4-ad17-a50704d66c59">https://support.office.com/en-us/article/manage-email-messages-by-using-rules-c24f5dea-9465-4df4-ad17-a50704d66c59</a></p> <p>Google Email Rules <a href="https://support.google.com/mail/answer/6579?hl=en">https://support.google.com/mail/answer/6579?hl=en</a></p>
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