

Requisition Approval

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Background

Universities can set up release codes (departments) to approve requisitions that meet certain criteria. The criteria available to specify separate approvals can be any combination of account assignment category (grant, cost center), material group (Computer Hardware), dollar amount (> \$5,000.00) and fund center (111111111).

Each release code (department) has a corresponding SAP security role. Each user that has the authority to approve with a release code must have that corresponding security role in order to apply that release. There is no limit to the number of users that can be assigned a release code role. The users assigned the role can then approve their department's requisitions using SAP transactions ME54N or ME55. Two additional methods of approving requisitions are either using the web interface (ESS Portal) or the SAP inbox (SAP transaction SWBP). In order to use either of these two methods, the SAP user must be assigned as a 'workflow approver' by the MM Team at Vartan Way. Each release code may have zero, one, or multiple SAP user (s) assigned as the workflow approver(s).

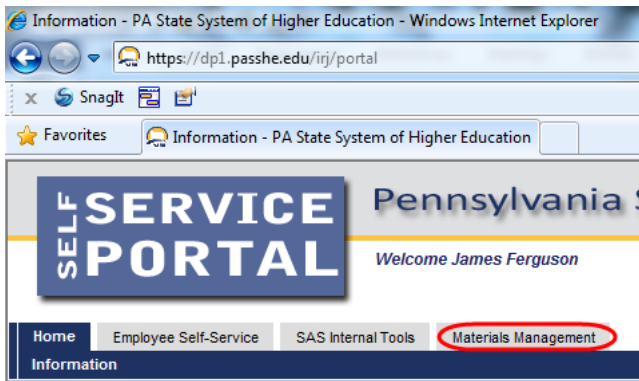
For example: 10SMITH is the Science department head and needs to approve all requisitions that are over \$5,000.00 for Fund Centers 111111111 and 222222222. The Science department is assigned release code 'P1'. 10SMITH would also like 10MILLER to approve these requisitions while he is out. 10SMITH and 10MILLER must both be assigned the SAP security role to approve requisitions with release code P1 in order to start approving. 10SMITH & 10MILLER can approve requisitions using SAP transactions ME54N or ME55.

10SMITH was assigned as the workflow person for this release code (P1), so he will receive a message in his SAP inbox (transaction SWBP) and in his university email inbox when there is a requisition requiring the 'P1' approval. He could approve the requisition from the SAP inbox message. Since the ESS Portal approval also uses the SAP inbox to determine the list of requisitions that need to be approved, 10SMITH could also approve requisitions through the ESS Portal.

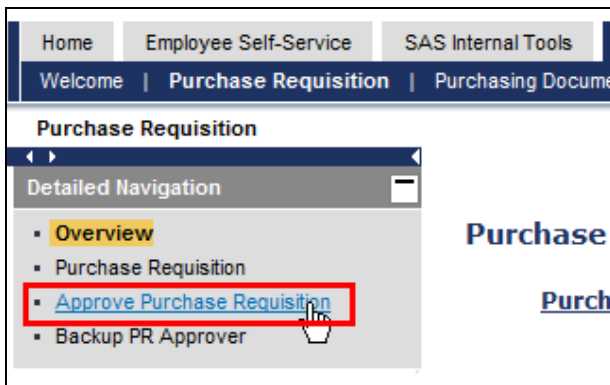
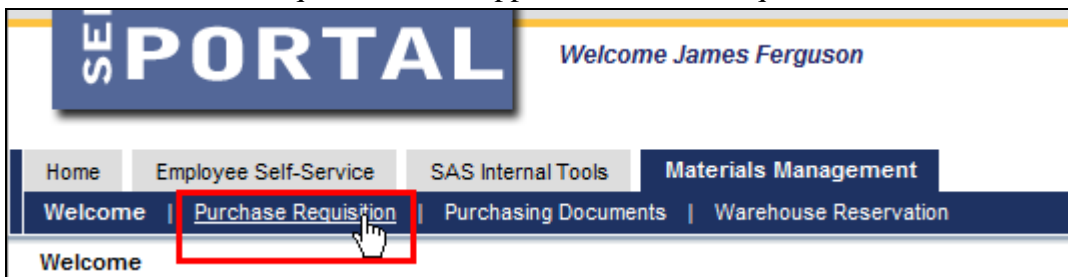
Release Purchase Requisition via the ESS Portal

Scenario: There is a requisition that needs to be approved. The approver was made aware of this requisition by a workflow message from SAP that was forwarded to his university email account.

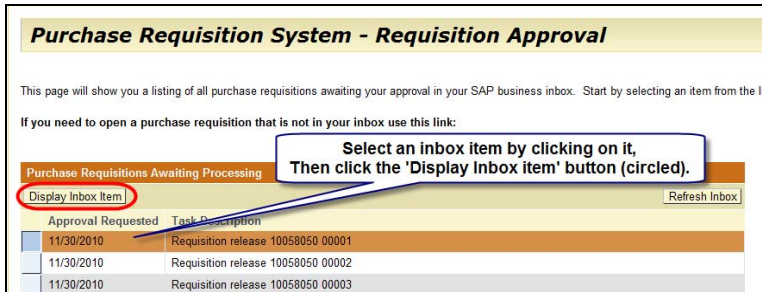
1. Access the Portal at web address: <https://portal.passhe.edu>
This is the same web page used for Employee Self Service. You will need to enter your log-in credentials to access the page.
2. After logging into the Portal, click the Materials Management tab circled below.
Note: The tabs on your screen may be different, depending upon your individual access.



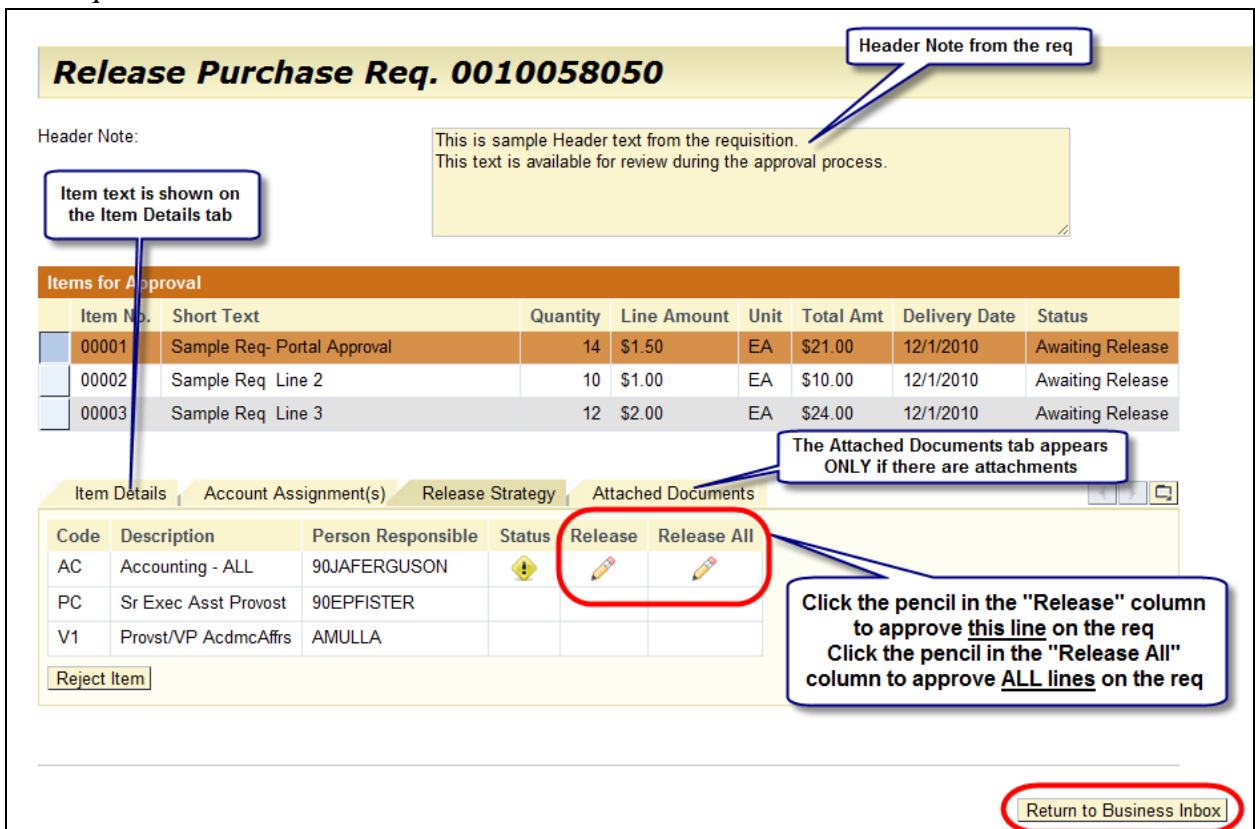
3. After you click the Materials Management tab, a second line of tabs will appear. Click the Purchase Requisition then Approve Purchase Requisition



- The Portal screen will show a list of requisitions waiting for approval in your SAP inbox. As noted on the screen image below, to Display a requisition, select it by clicking on the line then click the **Display Inbox Item** button.



- Click one of the pencil icons (circled) in the lower section of the screen to release the requisition. Click the **Return to Business Inbox** button (also circled) when finished with this req.



Notes: The Status column information changes to Released when the line is approved.

Canceling the Release in the ESS Portal

Scenario: A requisition was released in error and the approver wants to revoke or remove the approval.

- Follow Steps 1-3 above in [Release Purchase Requisition via the ESS Portal](#)

- Click the link (circled below), Open Unlisted Requisition.

Purchase Requisition System - Requisition Approval

This page will show you a listing of all purchase requisitions awaiting your approval in your SAP business inbox. Start by selecting an item from the list below and by clicking on the "View Details" button.

If you need to open a purchase requisition that is not in your inbox use this link: [Open Unlisted Requisition](#)

- If you know the requisition number, enter it in the field & click **Open Requisition**. If you DON'T know the requisition number, use the **Search Requisitions** in lower portion of the screen. The search defaults to reqs you approved during the past month.

Open Unlisted Purchase Requisition

Enter the purchase requisition number and click the 'Open Requisition' button.

Purchase Requisition Number:

If you do not know the requisition number, you may search for it using the criteria below. You must enter information in each field.

Approved / Cancelled On: * to

Approver SAP User ID: *

- Click one of the Reset "arrows" circled below to cancel the approval.

Release Purchase Req. 0010058050

Header Note: This is sample Header text from the requisition. This text is available for review during the approval process.

Items for Approval								
Item No.	Short Text	Quantity	Line Amount	Unit	Total Amt	Delivery Date	Status	
00001	Sample Req- Portal Approval	14	\$1.50	EA	\$21.00	12/1/2010	Awaiting Release	
00002	Sample Req Line 2	10	\$1.00	EA	\$10.00	12/1/2010	Awaiting Release	
00003	Sample Req Line 3	12	\$2.00	EA	\$24.00	12/1/2010	Awaiting Release	

Item Details | Account Assignment(s) | Release Strategy | Attached Documents

Code	Description	Person Responsible	Status	Release	Release All
AC	Accounting - ALL	90JAFERGUSON	✓		
PC	Sr Exec Asst Provost	90EPFISTER	⚠		
V1	Provst/VP AcdmcAffrs	AMULLA			

Click the Arrow in the "Release" column to cancel the approval for **this line** of the req
 Click the Arrow in the Release All column to cancel the approval for **ALL lines** of the req.

Rejecting a Requisition in the ESS Portal

Scenario: After a requisition line was created, the situation changed and the item on the requisition will never be ordered. The designated approver wants to ensure that the requisition line isn't processed later.

Note: After a requisition line is rejected, it cannot be changed or reprocessed. It can only be deleted (or the rejection indicator reset). Therefore, if the approver wants the requisitioner to make changes to a requisition prior to approval, the requisition should NOT be rejected.

1. Follow Steps 1-4 above in [Release Purchase Requisition via the ESS Portal](#)
2. Select the appropriate line in the requisition by clicking on it. Click the **Reject Item** button (circled)

Release Purchase Req. 0010058050

Header Note: This is sample Header text from the requisition. This text is available for review during the approval process.

Items for Approval							
Item No.	Short Text	Quantity	Line Amount	Unit	Total Amt	Delivery Date	Status
00001	Sample Req- Portal Approval	14	\$1.50	EA	\$21.00	12/1/2010	Awaiting Release
00002	Sample Req Line 2	10	\$1.00	EA	\$10.00	12/1/2010	Awaiting Release
00003	Sample Req Line 3	12	\$2.00	EA	\$24.00	12/1/2010	Awaiting Release

Item Details | Account Assignment(s) | Release Strategy | Attached Documents

Code	Description	Person Responsible	Status	Release	Release All
AC	Accounting - ALL	90JAFERGUSON	⚠		
PC	Sr Exec Asst Provost	90EPFISTER			
V1	Provst/VP AcdmcAffrs	AMULLA			

Reject Item

3. The line status is updated to show that the line was Rejected. The **Reject Item** button changes to **Cancel Rejection**. If the line was rejected in error, the rejection can be reset using this button.

Items for Approval							
Item No.	Short Text	Quantity	Line Amount	Unit	Total Amt	Delivery Date	Status
00001	Sample Req- Portal Approval	14	\$1.50	EA	\$21.00	12/1/2010	Rejected
00002	Sample Req Line 2	10	\$1.00	EA	\$10.00	12/1/2010	Awaiting Release
00003	Sample Req Line 3	12	\$2.00	EA	\$24.00	12/1/2010	Awaiting Release

Item Details | Account Assignment(s) | Release Strategy | Attached Documents

Code	Description	Person Responsible	Status
AC	Accounting - ALL	90JAFERGUSON	⚠
PC	Sr Exec Asst Provost	90EPFISTER	
V1	Provst/VP AcdmcAffrs	AMULLA	

Cancel Rejection

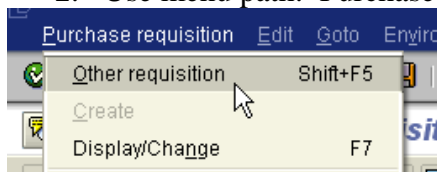
FAQ (Portal)

1. Why don't I see requisition number xxxxxxx in my inbox?
 - a. The requisition line is already approved
 - b. The requisition does not require approval with your release code(s)
 - c. Although you have security for the Release Code, you are not designated as one of the workflow approvers to receive the workflow email. Check with Procurement.
2. Why doesn't the pencil icon show up for beside my release code?
 - a. You do not have the required security role for the release code.
 - b. You have the security role for that Release Code, but you are not the workflow person.
 - c. If the "Backarrow" icon is present, the line is already approved.
 - d. Prior approvals are still pending
3. Error messages
 - a. **"Error while release item: Purchase Requisition xxxxxxx blocked."**
Another user has the document open in 'change' mode.
 - b. **"Error while release item: You have no authorization to release."**
You are listed as a Workflow approver for that release code, however the SAP security role for that release code is NOT assigned to your user ID.

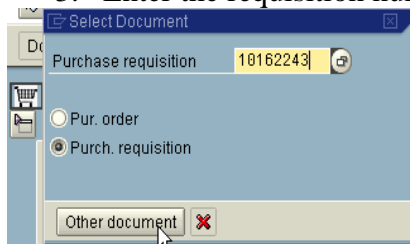
Release Purchase Requisition (ME54N)

Scenario: There is a requisition that must be released (approved) right away. ME54N is a quick way to release (approve) a single requisition when you know the requisition number.

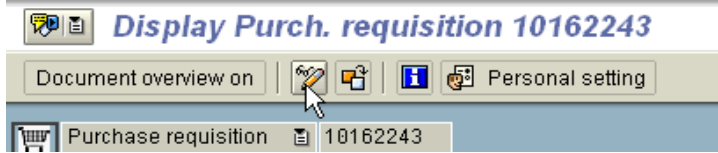
1. Execute transaction ME54N
2. Use menu path: Purchase requisition> Other requisition



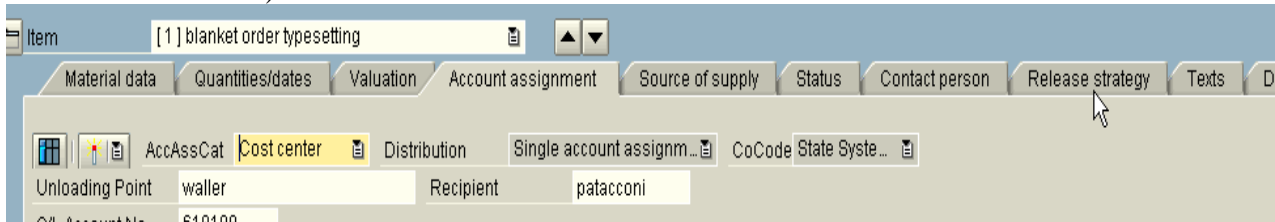
3. Enter the requisition number to be approved and click the 'Other document' button.



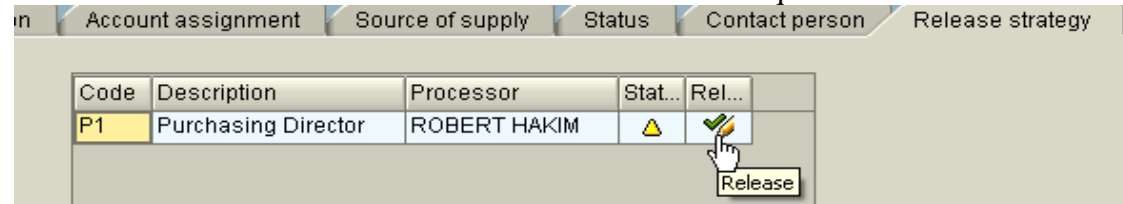
- In order to release the requisition you must be in change mode. If you are in display (screen is all grayed out), click on the 'Display/Change' icon in order to continue.



- Click on the 'Release strategy' tab in the 'Item' section of the requisition (lower portion of the screen).

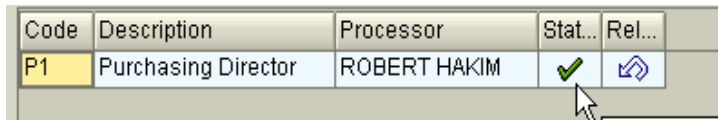


- Click on the 'Release' icon in order to release the requisition.

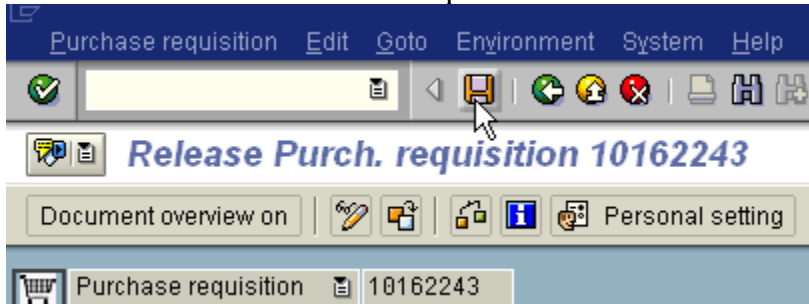


For this requisition there is only one approver required, therefore only one line appears in the release strategy section. A yellow triangle in the 'Status' block indicates that P1 release code approver has yet to release this requisition.

Note: The status box is now showing a green checkmark vs. the yellow triangle indicating that it has been released.



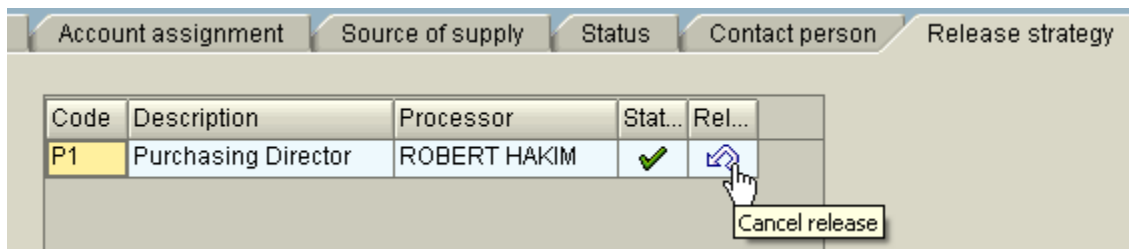
- Click on 'Save' and the requisition release is saved.



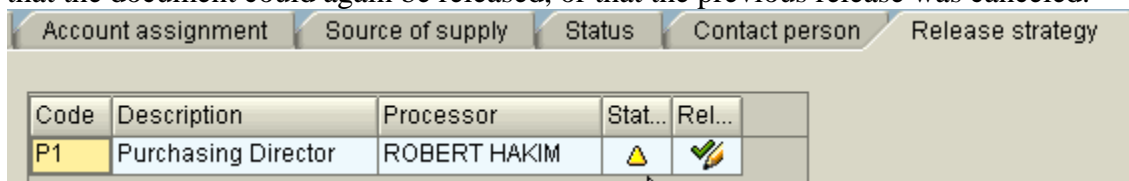
Canceling the Release (ME54N)

Scenario: The requisition should not have been released (approved) and the release needs to be cancelled.

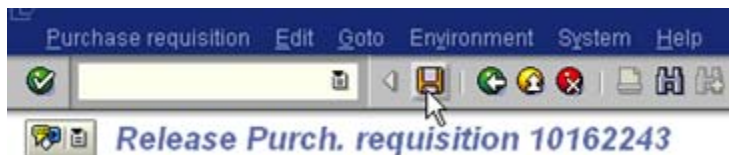
1. Follow steps 1 – 5 above ([Release Purchase Requisition](#))
2. Click on the ‘Cancel release’ icon in order to cancel the release.



Note: The green checkmark in the ‘Status’ box changes back to the yellow triangle indicating that the document could again be released, or that the previous release was canceled.



3. Click on ‘Save’ and the release is now cancelled.



Collective Release (ME55)

Scenario: The Science department head logs into SAP each morning to see what requisitions there are to approve for his department.

1. Transaction ME55
2. Enter the release code for the release along with the release group (see Note below). Click on ‘Execute’ as shown.

Collective Release of Purchase Requisitions

Release Code: 5I
 Release group: 40 to []

Release Prerequisite Fulfilled
 Requises for Overall Release
 Requises for Item-Wise Release

Note1: If Release Code is unknown see [FAQ](#) section. Release group is the plant (university) number, except for Shippensburg (99) and Office of the Chancellor (OC).

Note2: The approver can set a default value for the Release Code, using Parameter ID BFC.

- A list of ALL requisitions needing approval with this release code/group will be displayed.

Release	Purch....	I...	A	I	Short Text	Qu...	Unit	Valn Price	Total Value	Deliv. Date	Matl Gr...	Plant	PGr	Requirn.	Trackin...	Des.V...	Name of D
									4,707.88								
✓	10353431	1	K		Acme Parts Planos	5	BX	36.19	180.95	20130930	00100	40	408	40REQU...		1076769	ROAD RUN
✓		2	K		Acme Parts Safes	100	EA	12.69	1,269.00	20130930	00100	40	408	40REQU...		1076769	ROAD RUN
✓		3	K		Acme Parts Boulders	20	EA	8.13	162.60	20130930	00100	40	408	40REQU...		1076769	ROAD RUN
✓		4	K		Acme Parts Road Runner Traps	3	EA	9.94	29.82	20130930	00100	40	408	40REQU...		1076769	ROAD RUN

Note: If you need additional details not shown on the screen, double-click on the requisition number in the second column to display that requisition document. Click the green ‘back arrow’ to return to the list to approve the requisitions.

- To approve the requisition, click the Checkmark/Pencil icon in the first column. It will change to a Checkmark to indicate that the item is approved. No “save” is required.

Release	Purch.Req.	I...	A	I	M...	Short Text
✓	10353431	1	K			Acme Parts Planos
✓		2	K			Acme Parts Safes
✓		3	K			Acme Parts Boulders
✎		4	K			Acme Parts Road Runner Traps
✎		5	K			Acme Parts Planos
✎		6	K			Acme Parts Safes

**The first three items are Released.
The next three items are not.**

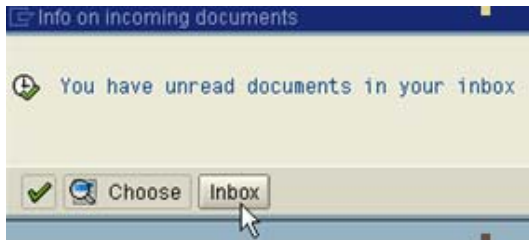
SAP Inbox Approval (SWBP)

Scenario: Each release code can have zero, one or many ‘workflow approvers’ assigned. The workflow approvers are the users designated to receive a message in their SAP inbox letting them know they have a requisition to release (approve). You can view these messages and approve the requisitions from the SAP inbox.

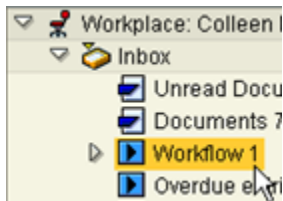
1. Transaction SBWP or click on the inbox icon as shown.



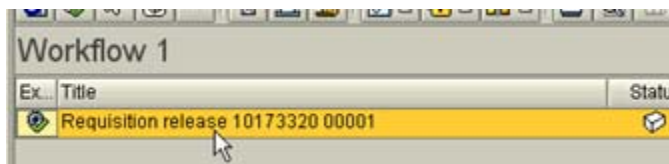
Note: Each time you logon to SAP, if there are unread messages in your inbox, the pop-up box below will be displayed. Clicking on the 'Inbox' icon on that pop-up will also take you to your SAP inbox.



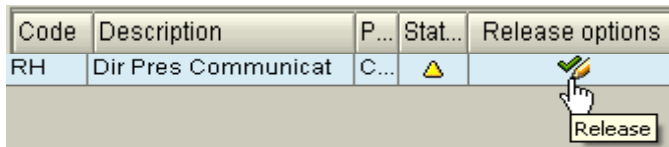
2. Click on the 'Inbox' folder and then 'Workflow' to see requisitions for release.



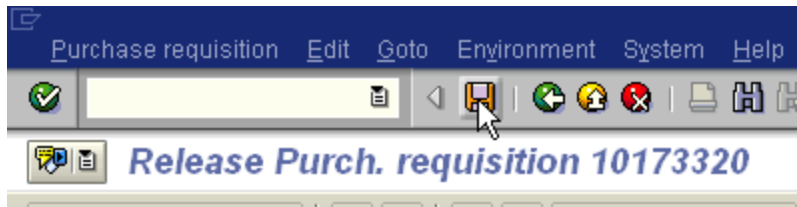
3. Double click on the requisition workflow message to see the requisition.



4. Review the requisition as necessary. Click on the 'Release Strategy' tab and then the 'Release' icon to release the requisition.



5. Click 'Save' in order to save the release. Repeat these steps for any other workflow messages for requisitions needing released.



FAQ

1. What if I receive the message 'Purchase Requisition xxxxxxxx cannot be released'?

Display the requisition using ME53N to see what issue below fits the situation.

- You are using ME54N and the message appears as soon as the transaction is entered. In this case ME54N is pulling in the last requisition reviewed and probably not the one you are looking to approve. Press Enter to bypass the message and continue with the steps under [approving with ME54N](#).
 - Requisition is on hold. The header of the requisition will read 'Display Purch. Requisition xxxxxxxx Held'.
 - Requisition has not been released by the release code before yours. Click on the Release Strategy tab to see if an approval is pending.
 - No authority to approve on behalf of the release code in the requisition. Click on the Release Strategy tab to see if your release code appears.
2. What if I receive the message 'No authorization for fund xxxxxxxxxx authorization group xx activity Post'?

The user is attempting to approve a requisition for another plant (university). Check the requisition number again.

3. What if I forget my release code that I can release on behalf of?

Check with your security administrator.

4. Who is assigned as (alternate) workflow approver(s) for my release code?

Check with your finance department or the MM Team at Vartan Way.