

# Purchase Requisition Approval



Rev: 7/23/12

## Background

Currently all purchase requisitions (PR' s) route directly to Procurement for assignment without review of:

- Proposed expenditure
- Approval of \$ value
- Routing/review by “special approvers”/functional areas; i.e. IT
- Selection of applicable/best matching material group



## Effective 06/22/2012

1. Special approvers are based on material group
2. Departmental approvers are based on \$ value
  - *Based on release codes (Dept) to approve requisitions that meet certain criteria.*
  - *Criteria - any combination:*
    - *Acct assignment category (grant, cost center),*
    - *Material group (Computer Hdwe),*
    - *\$ amount (> \$5,000.00) and fund center (1111111111).*
  - *Each release code (department) has a corresponding SAP security role.*
  - *User with authority to approve with a release code have that corresponding security role to do so.*
3. Approve PR' s using the web interface (Portal) or the SAP inbox (SAP transaction SWBP).
4. Approvers (and back-up approvers) will receive Microsoft Outlook email messages of an PR' s requiring their approval.

## Roles

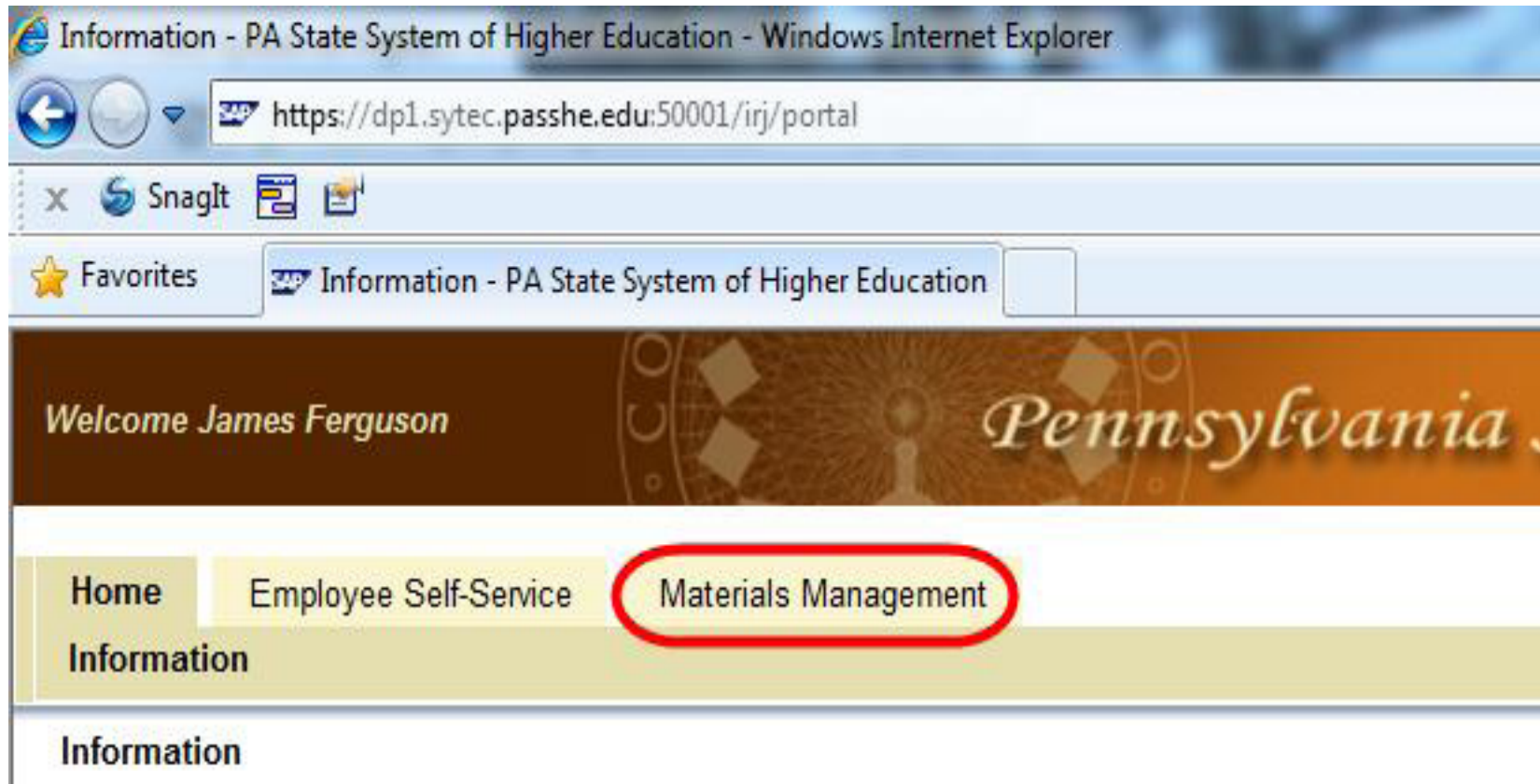
- 10SMITH is Science Dept. Head and needs to approve all requisitions >\$5,000 for Fund Centers 111111111 and 222222222. Science Dept. assigned release code „P1“. 10SMITH would also like 10MILLER to approve these requisitions while he is out.
  - 10SMITH and 10MILLER must both be assigned the SAP security role to approve requisitions with release code P1 in order to start approving.
- 10SMITH was assigned as the workflow person for this release code (P1), so will receive message in university email inbox.



## Approving via the Portal

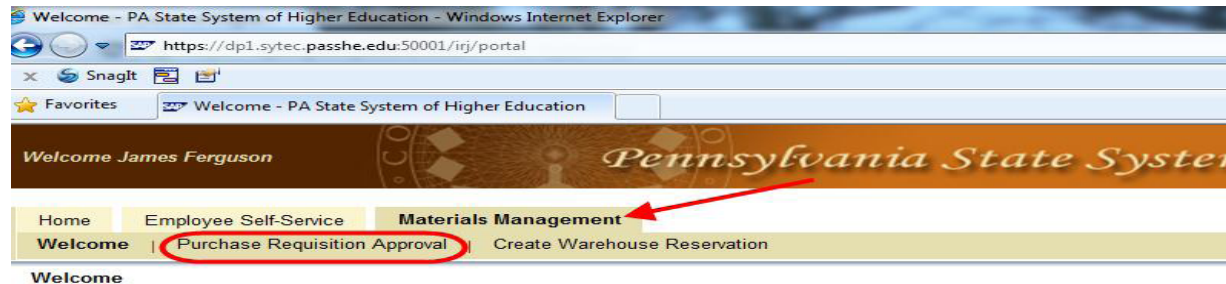
### Step 1

After logging into the Portal, click the Materials Management tab.



## Approving via the Portal cont' d

A second line of tabs may appear. Click the Purchase Requisition Approval tab.



**Step 2**

Portal screen will show list of reqs waiting for approval. To Display a req, select it by clicking on the line then click the **Display Inbox Item** button

**Step 3**

### 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.

If you need to open a purchase requisition that is not in your inbox use this link:

Select an inbox item by clicking on it, Then click the 'Display Inbox item' button (circled).

Purchase Requisitions Awaiting Processing		Refresh Inbox
<b>Display Inbox Item</b>		
Approval Requested	Task Description	
11/30/2010	Requisition release 10058050 00001	
11/30/2010	Requisition release 10058050 00002	
11/30/2010	Requisition release 10058050 00003	
11/30/2010	Requisition release 10058050 00004	

## Step 4 Approving via the Portal cont' d

Click one of the pencil icons in lower section of the screen to release the PR. Click the **Return to Business Inbox** button when finished with this req.

## Step 5

**Release Purchase Req. 0010058050**

Header Note:

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

Item text is shown on the Item Details tab

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

The Attached Documents tab appears ONLY if there are attachments

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 pencil in the "Release" column to approve this line on the req  
Click the pencil in the "Release All" column to approve ALL lines on the req

Reject Item

**Return to Business Inbox**



## Back-Up Approvers

A backup approver can now use the portal to approve without getting e-mails.

Scenario: There is a Dean of Science that is the primary approver for release code AA and the VP is the backup when the Dean is out. The VP (as backup) prefers to use the Portal to approve, however, does not want to be a workflow approver (get e-mails) when they are only the backup.

Answer: “Backup Approver” section of the portal will allow the VP to pull in the Dean’s inbox of PR’s pending approval & as long as the VP has the right security role in SAP he/she can approve the document(s).

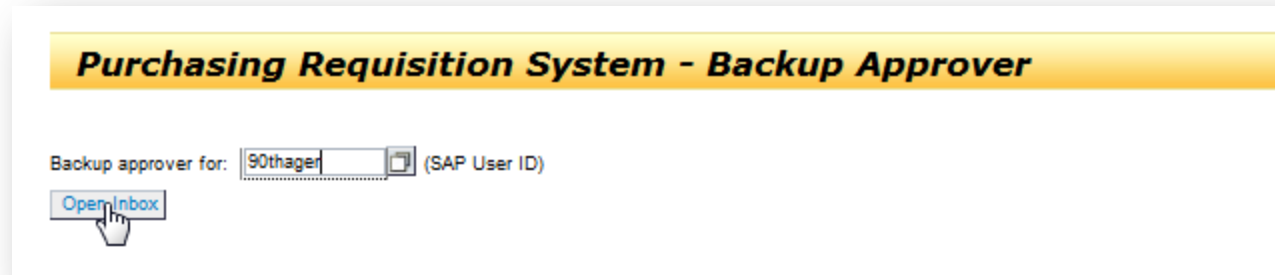
Once in ESS, click on Materials Management, Purchase Requisition, Backup approver





# Backup Approvers

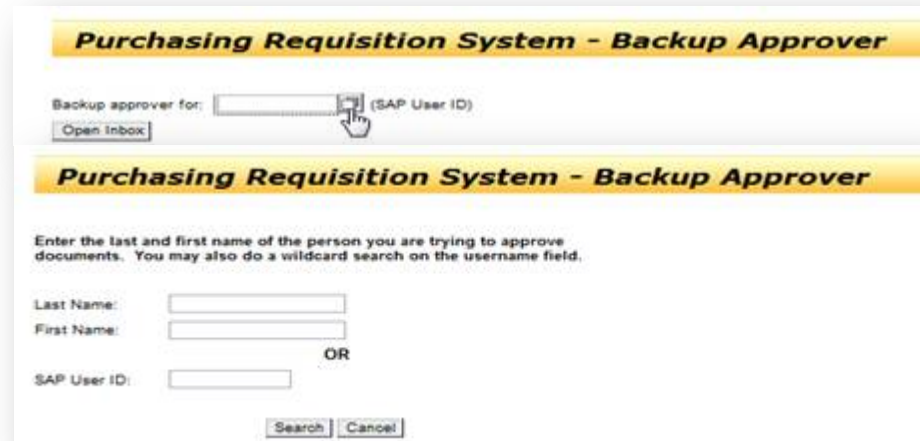
If known, enter the SAP ID of the approver you are backing up and click “Open inbox”.



If the SAP user ID is unknown, click the dropdown to search by first AND last name or by a partial SAP ID using wildcards (\*).

Note: Searching by first and last name may not always find the user you are looking for (i.e. SAP id in last name field, last and first name switched, etc.).

**Then continue with steps 1-5**



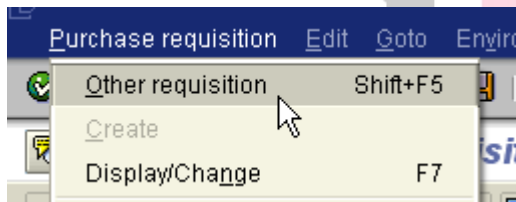
# Approval via core SAP

## Release Purchase Requisition(ME54N)

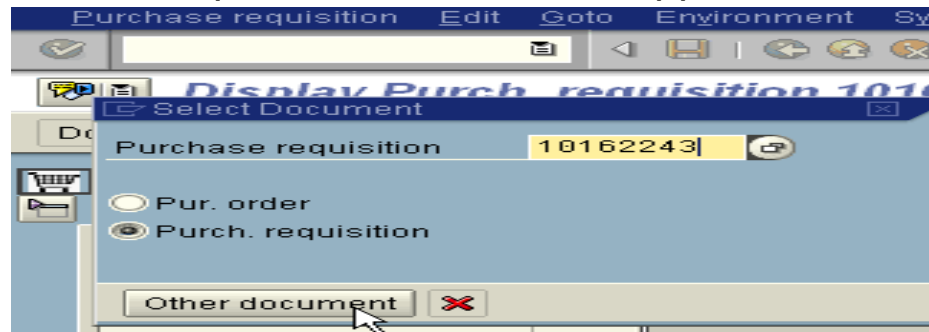
Scenario: There is a requisition that must be released (approved) right away. ME54N is a quick way to release (approve) a single requisition when you know the requisition number.

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

If known, enter the SAP ID of the approver you are backing up and click “Open inbox”.



3. Enter the requisition number to be approved and click the „Other document“ icon

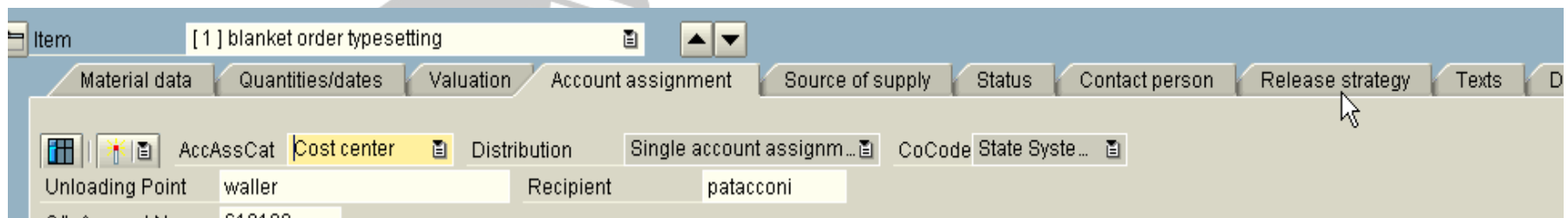


## Approval via core SAP

4. In order to release the requisition you must be in change mode. If you are in display, click on the „Display/Change“ icon in order to continue.



5. Click on the „Release strategy“ tab in the „Item“ section of the requisition (lower portion of the screen).



6. Click on the „Release“ icon in order to release the requisition



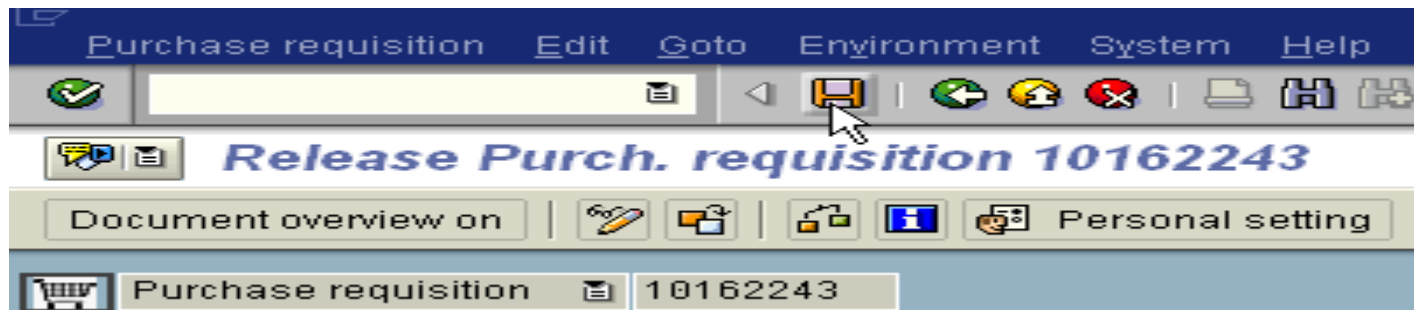
For this requisition there is only one approver required, therefore only one line appears in the release strategy section. A yellow triangle in the „Status“ block indicates that P1 release code approver has yet to release this requisition.

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

## Approval via core SAP

Code	Description	Processor	Stat...	Rel...
P1	Purchasing Director	ROBERT HAKIM	✓	🔄

7. Click on „Save” and the requisition release is saved.

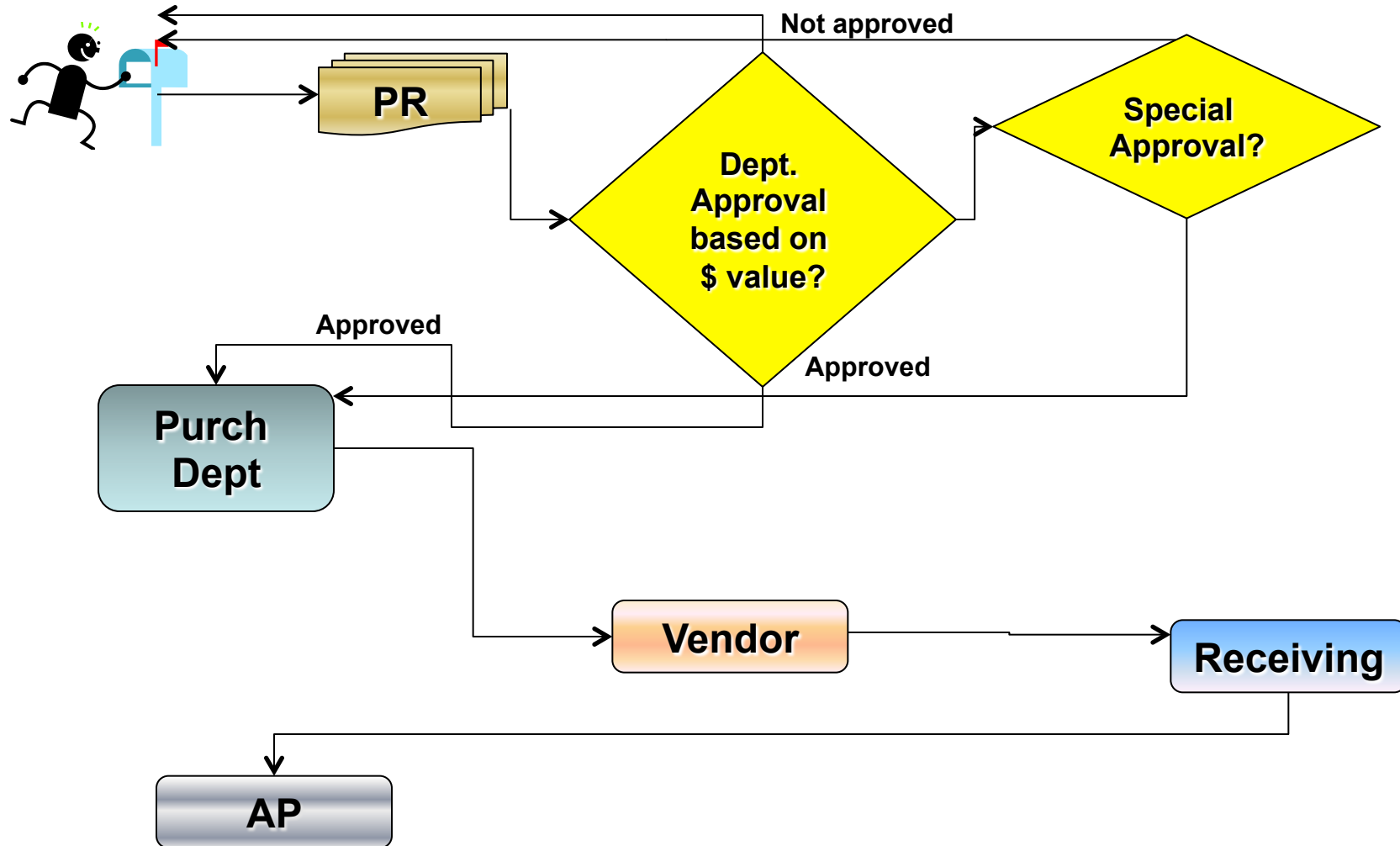


## Business Case

- Best practice used by nearly all PASSHE universities
- Internal audit/controls:
  - Lack of budgetary and fiscal review
  - Provides audit trail of approvals
- PASSHE budget constraints require tighter scrutiny of expenditures
- Drives budget responsibility to budget “owners”
- Facilitates budget reporting



# New Process





## Special Approvers

Material Group	Material Group Desc.	Special Approver	\$ Level for Approval
00172	DESKTOP PRINTERS	Celli	\$ 1,000.00
00180	COPIER-PURC RENT EQ	Celli	\$ 1,000.00
00252	COMPUTER SOFTWARE	Celli	\$ 1,000.00
00260	COMPUTER HARDWARE	Celli	\$ 1,000.00
00108	LIBRARY MATLS SUPP	Magolis	\$ 1,000.00
00124	EQ LIBRARY ARCHIVAL	Magolis	\$ 1,000.00
00908	SRVC-PRINTING PHOTO	Mandel	\$ 1,000.00
00132	SIGNS FLAGS BANNERS/(LOGOS)	McGuire	\$ 5,000.00
00140	PROMOTIONAL PRODUCTS	Rush	\$ 5,000.00
00748	SRVC-ADVERTISING	Rush	\$ 5,000.00
	GRANTS	Kaschak	\$ All

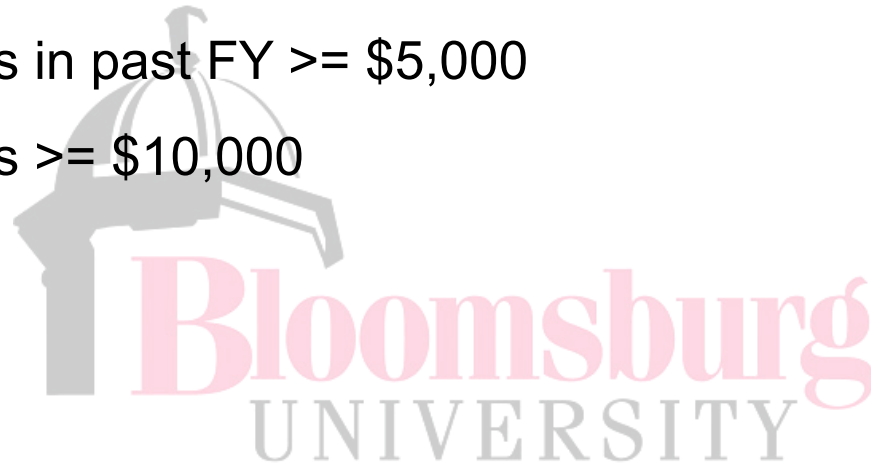




## Approval Thresholds

<u>Purchase Req Value</u>	<u>Approver</u>
<\$5,000	Requisitioner
>\$5,000	Dean/VP

- 7.2% of PR' s in past FY  $\geq$  \$5,000
- 3.5% of PR' s  $\geq$  \$10,000



## Departmental (Primary) Approvers & Backup Approvers

Description	SAP ID	Primary Approver	SAP ID	Backup Approver
All codes	10DSHAMBUR	Diann Shamburg	10ENOLTE	Evanna Nolte
Tech Support Service	10DCELLI	David Celli	10WMOHR	Wayne Mohr
Library Services	10DMAGOLIS	David Magolis	10BROBBINS	Barb Robbins
Purchasing Director	10JMANDEL	Jeffrey Mandel	10ENOLTE	Evanna Nolte
			10DSHAMBUR	Diann Shamburg
Marketing & Communications	10RRUSH	Rosalee Rush	10TMCGUIRE	Tom McGuire
			10BMARTIN	Bonnie Martin
Asst Dir Budget/Fin	10BMEYER	Barb Meyer	10DNEWMAN	Deb Newman
Asst VP Finance/Bud	10CTHRUSH	Claudia Thrush	10DNEWMAN	Deb Newman
Asst Dir Budget/Fin	10DNEWMAN	Deb Newman	10CTHRUSH	Claudia Thrush
HR Director	10JREED	Jerry Reed	10PAMARANT	Phil Amarante
Dir of Financial Aid	10JBIERYLA	John Bieryla	10AKISHBA2	Amanda Kishbaugh
Grants	10JKASCHAK	Julia Kaschak	10DNEWMAN	Deb Newman
Asst Comptroller	10KCROSSIN	Kathryn Crossin	10CTHRUSH	Claudia Thrush
VP Finance & Adm	10RRUGEN	Richard Rugan	10CTHRUSH	Claudia Thrush
Dir of Safety/Police	10TPHILLI2	Tom Phillips	10JWONDOLO	Joe Wondoloski
			10BDELEON	Belinda Deleon
VP Academic Affairs	10IBLAKE	Ira Blake	10JLINCOLN	Jonathan Lincoln
Act 101	10IWRIGHT	Irving Wright	10JLINCOLN	Jonathan Lincoln
			10MCHEESE	Melissa Cheese
Registrar	10JKISSELL	Joseph Kissell	10JLINCOLN	Jonathan Lincoln
			10LHOCK	Linda Hock
Dir PlanningResearch	10KSLUSSER	Karen Slusser	10IBLAKE	Ira Blake
Dean College of Bus	10MTIDWELL	Michael Tidwell	10JRIVERA	Joan Benek-Rivera
Dean Science/Tech	10RMARANDE	Robert Marande	10KDAVIS	Karen Davis
Dir Planning/Assesmn	10SJONES	Sheila Dove Jones	10IBLAKE	Ira Blake
Asst to Provost	10SVALENCI	Sherri Valencik	10JLINCOLN	Jonathan Lincoln
Honors Program	10SKOKOSKA	Stephen Kokoska	10JLINCOLN	Jonathan Lincoln
Continuing Education	10TFLETCHER	Thomas Fletcher	10JLINCOLN	Jonathan Lincoln
Chair Exercise/Scien	10TMCCONNE	Timothy McConnel	10TMARTUCC	Thomas Martucci
Dir Residential Life	10TKRESCH	Tom Kresch	10JMCCORMA	James McCormack
Quest	10SLAWSON	Susan Lawson		
Assc Dir Resdnt Life	10JMCCORMA	James McCormack	10JHUNSING	Jennifer Hunsinger
Dir Solve	10JDOWNING	Jean Downing	10EVALOVAG	Ed Valovage
Asst Dir Career Dev	10JFITZGER	Jeanne Fitzgerald	10AJOHNSON	Amy Johnson
Dir Athletics	10MMCFARLA	Michael McFarland	10KHEITZMA	Kathleen Heitzman
President's Office	10BCROMLEY	Brenda Cromley	10DSOLTZ	David Soltz
Telecommunications	10GMELNICK	Gary Melnick	10WMOHR	Wayne Mohr
Application Develop	10JGESSNER	Jim Gessner	10WMOHR	Wayne Mohr

## Departmental (Primary) Approvers & Backup Approvers

Description	SAP ID	Primary Approver	SAP ID	Backup Approver
Tech/Performing Arts	10RPRESSWO	Randall Presswood	10WMOHR	Wayne Mohr
Instructional Tech	10RBOBAK	Regina Bobak	10WMOHR	Wayne Mohr
Network Services	10SJOSUWEI	Sam Josuweit	10WMOHR	Wayne Mohr
Asst VP Tech/Library	10WMOHR	Wayne Mohr	10LHEMRICK	Lisa Hemrick
			10JGESSNER	Jim Gessner
			10BROBBINS	Barb Robbins
Facilities Services	10ENESS	Eric Ness	10CREITMEY	Colin Reitmeyer
			10RBANKES	Dick Bankes
			10VDILORET	Vince Diloretto
			10MPROUT	Mary Prout
			10JHOLTZMA	John Holtzman
			10CDEPOE	Carol Depoe
			10WMOHR	Wayne Mohr
Dir Social Equity	10RWISLOCK	Robert Wislock	10VRAINIS	Victoria Rainis
			10LTOMASH2	Linda Tomashefski
			10VKUPO	Leilani Kupo
			10IBLAKE	Ira Blake
Signs_Logos	10TMCGUIRE	McGuire	10RRUSH	Rosalee Rush
Community Outreach	10ASTONE	Allison Stone-Briggs		
Dean of Education	10EMAUCH	Elizabeth Mauch	10JLINCOLN	Jonathan Lincoln
Dean of Liberal Arts	10JBROWN	James Brown	10JLINCOLN	Jonathan Lincoln
Grant Coordinator	10JHARRIS	Jerrold Harris		
Asst VP Academic Aff	10JLINCOLN	Jonathan Lincoln	10IBLAKE	Ira Blake
Upward Bound	10KBAUMAN	Kate Bauman		
Asst VP Grad Studies	Position Pending	Position Pending		
Dir Student Support	10MBLOSKEY	Theresa Bloskey		
Chair Technology	10TPHILLIP	Timothy Phillips		
Dir Admissions	10CKELLER	Chris Keller	10DSOMERVI	Dione Somerville
VP Student Life	10DSOMERVI	Dione Somerville		
Student Union Aux	10EVALOVAG	Ed Valovage		
Asst VP Student Life	10JLONG	Jeffrey Long	10DSOMERVI	Dione Somerville
Dir Child Center	10JCOLEMAN	Judy Coleman Brinich	10JLONG	Jeffrey Long
Dir Multicultural	10MRODRIG2	Madelyn Rodriquez		
Comm Govt Assn	10NDAMATO	Neil D'Amato		
Dir Counseling	10WHARRAR	William Harrar	10JLONG	Jeffrey Long
VP Univ Advancement	10EEVANS	Erik Evans		
Alumni Engagement	10LMICHAEL	Lynda Michaels	10EEVANS	Erik Evans