



Actioning a Requisition Sent To You

If you receive an e-mail notification advising you that a requisition is awaiting your approval you must action it as soon as possible, especially if it is a foreign currency requisition. The requisition will be listed in **My Notifications**.

If you are going to be absent ensure you set a vacation rule, to ensure any requisitions sent to you for approval are automatically forwarded to another colleague.

An automatic e-mail will be sent to the originator if you have not approved the requisition within 3 days, a further e-mail will be sent 2 days later to the originator to advise the document has still not been approved and a further final reminder two days later if it still has not been approved. The requisition will then return to the **Saved cart** of the person who raised it.

At the bottom of the iProcurement shop screen is **My Notifications**, which lists any requisitions awaiting your approval.

My Notifications			
			Full List
...			
Type	From	Subject	Sent
Requisition	Delegate11, Del	Purchase Requisition 2089540 for Delegate11, Del (240.00 GBP)	01-Nov-2021
Requisition		Unable to reserve Purchase Requisition 2089528	28-Oct-2021
Requisition	Delegate11, Del	Purchase Requisition 2089468 for Delegate11, Del (7,680.00 GBP)	19-Oct-2021
Requisition	Delegate11, Del	Purchase Requisition 2089451 for Delegate11, Del (84.00 GBP)	06-Oct-2021

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.

Actioning Requisitions

1. From **My Notifications**, click on the **Requisition** awaiting your approval and a screen similar to below will display with limited information, where you will have a number of actions you can carry out.



UNIVERSITY OF CAMBRIDGE iProcurement

Shop: Stores >
Purchase Requisition 2089540 for Delegate11, Del (240.00 GBP)

From Delegate11, Del Description Microscope
To SMITH, Max Total 200.00 GBP
Sent 01-Nov-2021 11:38:28 Tax (Non Recoverable) 40.00 GBP
ID 8710214 Attachments

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (GBP)	Amount (GBP)	Charge Account
1	Microscope	FISHER SCIENTIFIC UK LTD	PDAA	EA	1	200	200.00	U.PD.PDAA.AAAA.ELCO.0000

Approval Sequence

SMITH, Mr Max → Pre-Approved

Num	Name	Action	Action Date	Note
3	SMITH, Mr Max	Pending		
2	Delegate11, Del	Reserved	01-Nov-2021 11:38:28	
1	Delegate11, Del	Submitted	01-Nov-2021 11:38:19	

Related Applications

- View Requisition Details
- Edit Requisition
- Open Document

Response

Forward To: All Employees and Users

Note: [Text Area]

[Return to Worklist](#)

Edit Requisition

Enables those items within the requisition to be displayed in your shopping cart screen with a view to amending them e.g. account code was incorrect, wrong tax code or a need to split over various account codes.

- Click **Edit Requisition**.
- **Approver checkout** will display, make any relevant changes as you check the requisition.
- Once changes have been made click **Submit**.
- Click **Continue** to complete your approval response.

View Requisition Details

This enables you to view requisition lines in more detail.

- Click on **View Requisition Details** to display the details screen.
- Click on the **Details** icon for the first item line. This will show any receipts, invoices and payments made relating to the item line.
- Click **Show Additional Information** to review the requisition line supplier, account code and any attachments.
- To view the **Tax Information** click on the link in the **Item Information** section. Then click **Additional Tax Information**, click **Cancel** to display the Lines.
- Click **Return to Requisition Line Details**.



- Click **Return** and then **Return** again to display the purchase requisition screen.
- Complete your approval response.

Approval Responses

Approve	Select if requisition is correct. If the requisition was raised by a member of staff with Requisitioner responsibility, once approved the requisition will go into the pool for the department awaiting creation into an order by a buyer. If it was raised within a buyer responsibility, the system will approve it, create it into an order, approve the order and either transmit direct to the Marketplace supplier or it will be printed and faxed to supplier.
Approve and forward	Use if you wish another of member to review it even after you have approved it yourself. Ensure that you enter the Surname of the colleague in the blank Forward To field and Tab . Complete the Note field if applicable and click Approve and Forward .
Forward	Use this is you wish to forward the requisition to another colleague. Ensure you complete the Forward To and Note fields and then click Forward .
Reject	Complete the Note field and then click Reject . Requestor will receive an e-mail notification and it will display in their My Notifications and in My Requisitions
Request information	Use this If more information is required prior to approval. Click Request Information and complete the Information Requested field before clicking Submit . Requestor will get an e-mail notification and it will display in their My Notifications and in My Requisitions

Once you have carried out an action on a requisition, it will no longer be listed in My Notifications and the status will update on the requestors screen.

Actioning a requisition via remote access.

When you receive the email notification, you must click on the link '*Please click here to respond*'. You will then need to log into CUFS, and the screen where you approve or reject the requisition will display and you just simply follow the procedures above.

Some users may experience problems when actioning remotely, and their cache will need to be cleared which can usually be accessed via internet options.

Setting Vacation Rules

Set this rule up when you are going to be away from the office so that any requisitions sent to you for actioning will be sent to another colleague to action in your absence.

1. From the iProcurement Home Page, click on **Vacation Rules** and **Create Rule**.
2. Select **Next** on the Vacation Rule: Item Type screen to display the screen below.



Shop Requisitions Receiving

Requisitions Notifications Approvals

Item Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type All

Notification All

* Start Date 01-Nov-2021 11:46:52
(example: 01-Nov-2021 11:46:52)

* End Date

Message

Comments will display with each routed notification

Delegate All Employees and Users

Cancel Back Step 3 of 3 Apply

3. Complete the following fields:

- **Start Date**
- **End Date**
- **Message**

4. In the blank delegate field enter the **surname of the colleague** and **Tab**.

Ensure that the colleague you are delegating to in your absence either has the same or higher approval limit than you.

5. If there is more than one member of staff with that surname **Quick Select** the relevant one.

6. Click **Apply**.