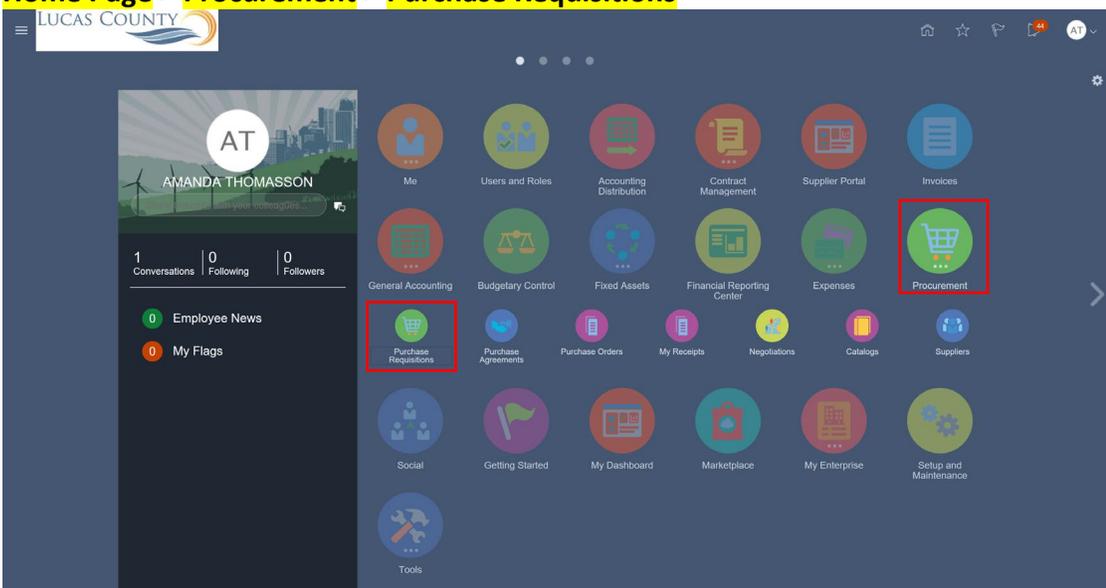
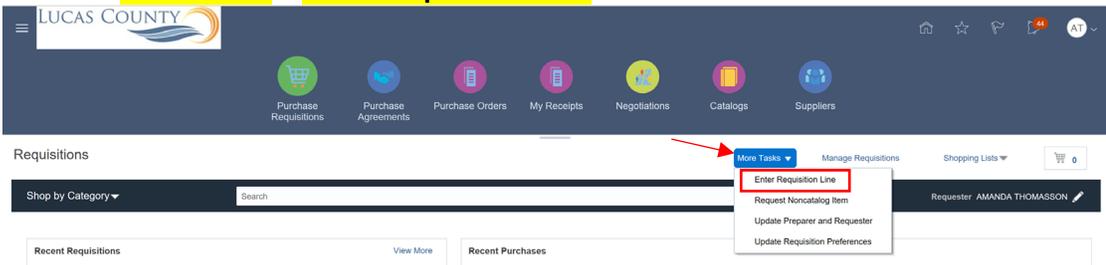


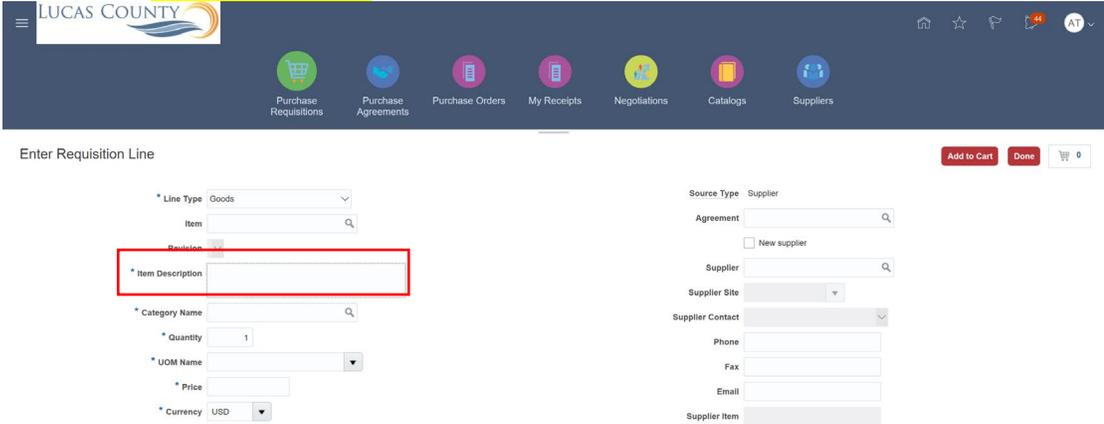
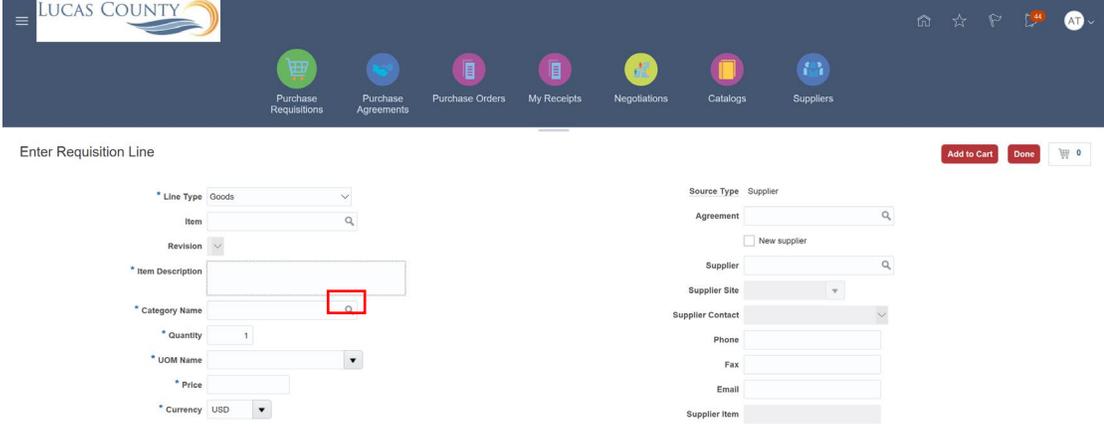
## Add Approver to Requisition Approval Path

**Audience:** Requester, Approver

**Purpose:** Your company policies determine the approver for your requisition. You cannot change the default approver list, but if you have been given access you can add approvers. You cannot delete system generated approvers. You can add approvers anywhere within your existing approval list. For example, your existing approval list is Manager A, Manager B, and then Manager C. You add Manager X. The approval now routes through Managers A, B, C, and then X, stopping at X. This job aid will provide steps to add an approver to the approval path.

**Department policy determines who has authority to approve your requisition(s). System generated approvers cannot be deleted, but approvers can be added anywhere within your approval list per requisition.**

| Step | Action  |
|------|---|
| 1    | <p>Log into Oracle.<br/> <b>Home Page &gt; Procurement &gt; Purchase Requisitions</b></p>  <p>The screenshot shows the Oracle Home page for user AMANDA THOMASSON. The navigation path 'Home Page &gt; Procurement &gt; Purchase Requisitions' is highlighted in yellow. The 'Procurement' icon, represented by a shopping cart, is highlighted with a red box. Other icons for various Oracle modules are visible in the background.</p>  |
| 2    | <p>Click the <b>More Tasks &gt; Enter Requisition Line</b> link.</p>  <p>The screenshot shows the Oracle Requisitions page. The 'More Tasks' dropdown menu is open, and the 'Enter Requisition Line' option is highlighted with a red box. A red arrow points from the 'More Tasks' dropdown to the highlighted link. The page header includes 'Purchase Requisitions', 'Purchase Agreements', 'Purchase Orders', 'My Receipts', 'Negotiations', 'Catalogs', and 'Suppliers'.</p> |
| 3    | <p>Click the <b>Line Type</b> list.</p>   |

|    |  |
|----|--|
| 4  | <p>Select the <b>Goods</b> list item.</p>                                   |
| 5  | <p>Click in the <b>Item Description</b> field.</p>                         |
| 6  | <p>Enter information into the <b>Item Description</b> field.</p>   |
| 7  | <p>Click in the <b>Category Name</b> field.</p>  |
| 8  | <p>Click the <b>Search icon</b>: by the <b>Category Name</b> field.</p>  |
| 9  | <p>Click in the <b>Category Name</b> field.</p>  |
| 10 | <p>Enter <b>Category Number</b> into <b>Category Name</b> field if known</p>   |

11 Click **Advance** button to search for Category Number/Description

The screenshot shows the 'Enter Requisition Line' screen with a 'Search and Select: Category Name' dialog box open. The 'Advanced' button in the dialog is highlighted with a red box. The dialog contains fields for 'Category Name' and 'Description', and buttons for 'Search', 'Reset', 'OK', and 'Cancel'.

12 Use the **Does not equal**, to get a list of all Category Name/Description

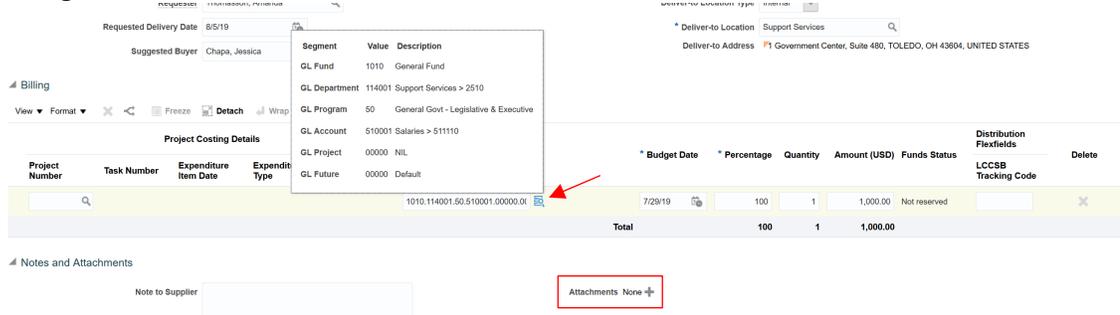
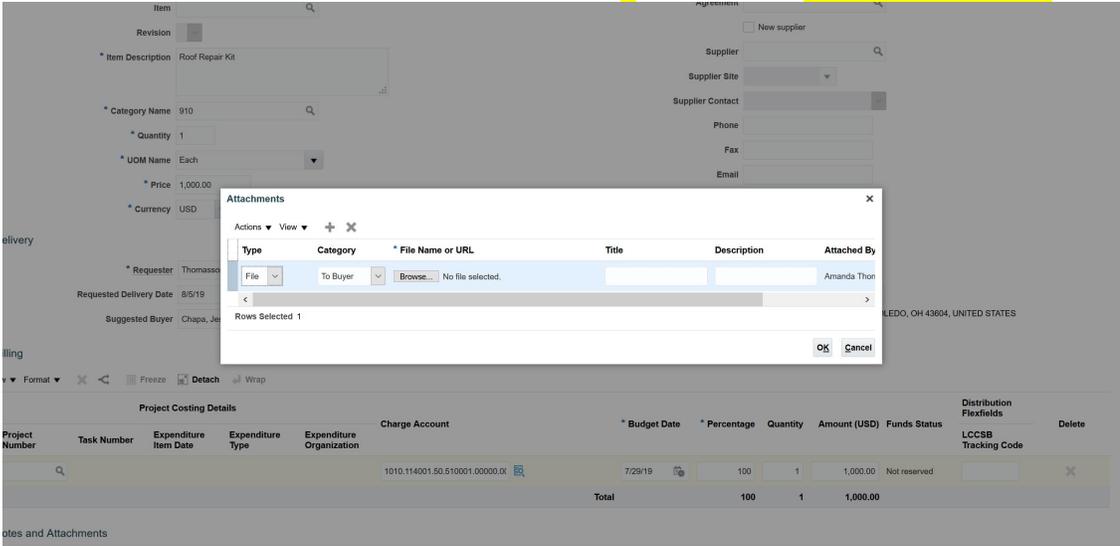
The screenshot shows the same 'Enter Requisition Line' screen with the search dialog box open. The 'Category Name' dropdown menu is set to 'Does not equal', and the 'Description' dropdown is set to 'starts with'. A red box highlights the 'Does not equal' selection. The dialog also includes 'Add Fields' and 'Reorder' buttons.

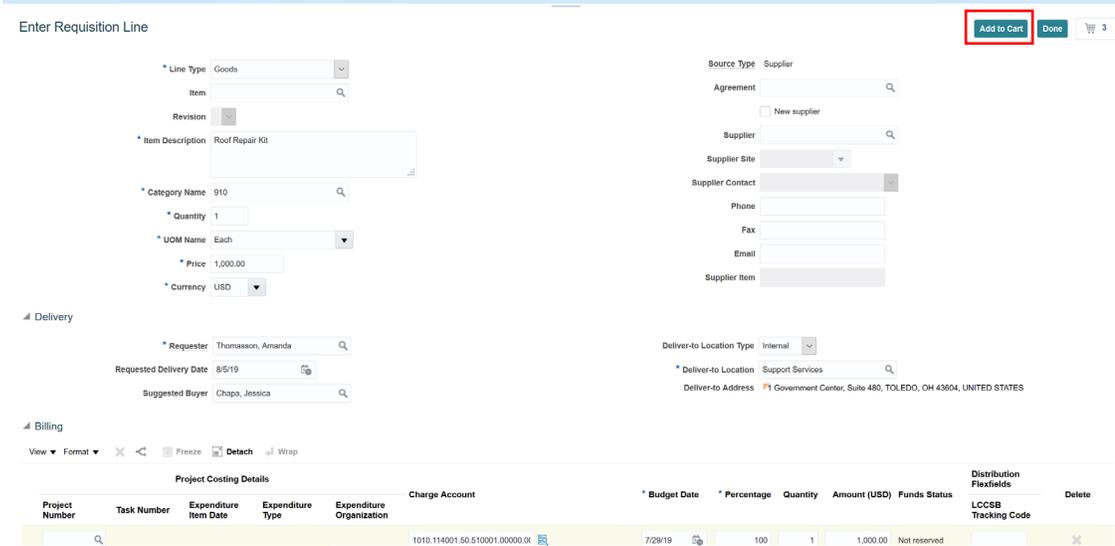
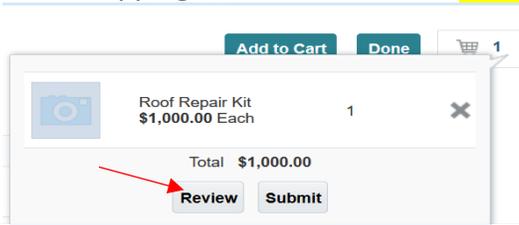
13 Enter information into the **Description** or **Category** fields.

14 Click the **Search** button.

15 Make a selection from the search results list.

The screenshot shows the search dialog box with search criteria: 'Category Name' set to 'Does not equal' and 'a', and 'Description' set to 'starts with'. The 'Search' button is highlighted. Below the dialog, a list of search results is displayed, with the first result, '005 ABRASIVES', highlighted in red. The list includes various category numbers and descriptions such as 'ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES' and 'AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SE...

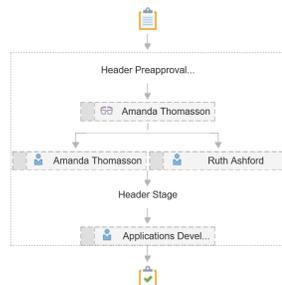
|    |  |
|----|--|
| 16 | Click the <b>OK</b> button.  |
| 17 | Click in the <b>Quantity</b> field.  |
| 18 | Enter information into the <b>Quantity</b> field.  |
| 19 | Click in the <b>UOM</b> field.   |
| 20 | Enter information into the <b>UOM</b> field.   |
| 21 | Click the <b>EA Quantity</b> Each list item.   |
| 22 | Click in the <b>Price</b> field.   |
| 23 | Enter information into the <b>Price</b> field.   |
| 24 | Click in the <b>Currency</b> field.  |
| 25 | Click the <b>Charge Account</b> icon and either accept default or add new applicable charge account information. |
|    |                               |
| 26 | In the Notes and Attachments section, click the <b>+</b> icon next to <b>Attachments None</b> .                  |
|    |                              |
| 27 | In the Attachments window click the <b>Type</b> list.  |
| 28 | Select the <b>File</b> list item.  |
| 29 | Click the <b>Category</b> list.  |
| 30 | Click to select the <b>To Buyer</b> list item.   |
| 31 | Click the <b>Browse</b> button under <b>*File Name or URL</b> field.   |
| 32 | Select a file for <b>Attachment</b> .  |
| 33 | Click in the <b>Title</b> field.   |
| 34 | Enter information into the <b>Title</b> field.   |

|    |  |
|----|--|
| 35 | Click in the <b>Description</b> field and enter information into the <b>Description</b> field. |
| 36 | Click the <b>Add to Cart</b> button.   |
|    |              |
| 37 | Click Shopping Cart icon and select <b>Review</b> .  |
|    |              |
| 38 | Select Y/N option for <b>*State Contract - If yes, please insert Contract Number.</b>          |
| 39 | Enter if 'Y' is selected enter a number in the <b>State Contract Number</b> field.             |
| 40 | Select Y/N <b>*Sole Source</b> ("If yes please attach proof of Sole Source").                  |
| 41 | Select Y/N <b>*Resolution Attached.</b>  |
| 42 | Select Y/N <b>*Will Services be performed on Lucas County property?</b>                        |
| 43 | Click the <b>Check Funds</b> button.   |
| 44 | Click the <b>View Funds Check Results</b> button.  |
| 45 | Click the <b>Done</b> button.  |
| 46 | Click the <b>OK</b> button.  |
| 47 | Click the <b>Manage Approvals</b> button.  |
|    |             |
| 48 | The <b>Manage Approvals</b> page is displayed, showing the approval path.                      |

Manage Approvals (Requisition 1195)

Options Apply Reset

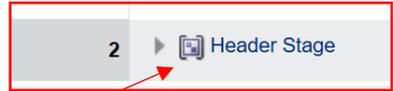
| Section | Stage or Participant  |
|---------|---|
| 1       | Header Preapproval Stage                                    |
| 1.1     | Amanda Thomasson - Requester FYI                            |
| 1.2     | Parallel  |
| 1.2.1   | Pre Approval Header First Responder Wins                    |
| 1.2.1.1 | Amanda Thomasson - Pre Approval Header First Responder Wins |
| 1.2.1.2 | Ruth Ashford - Pre Approval Header First Responder Wins     |
| 2       | Header Stage  |



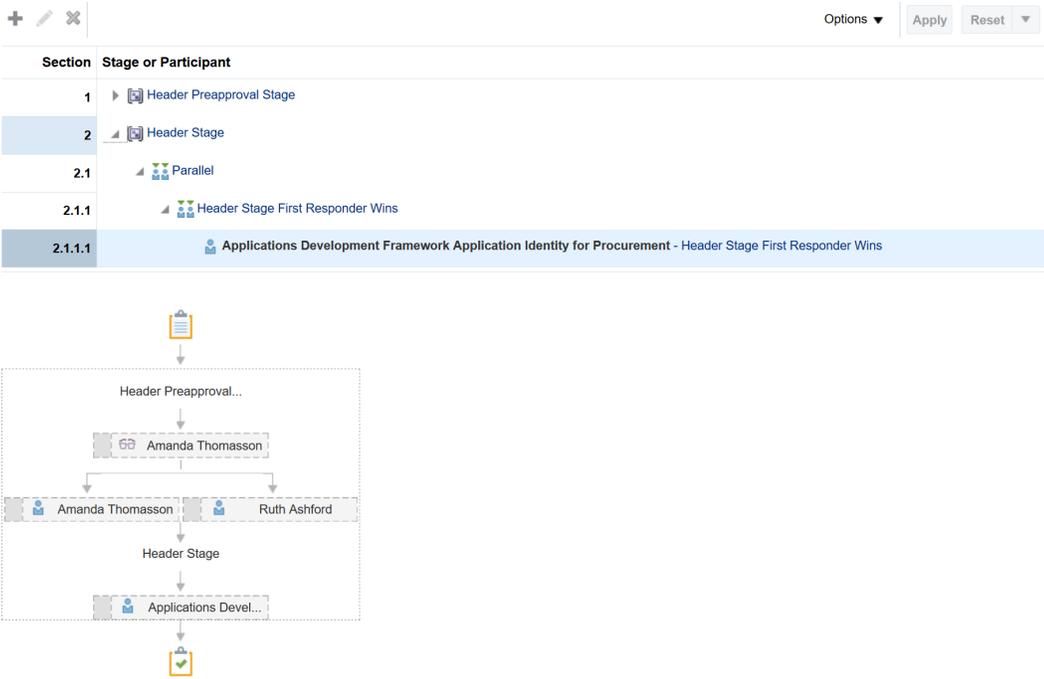
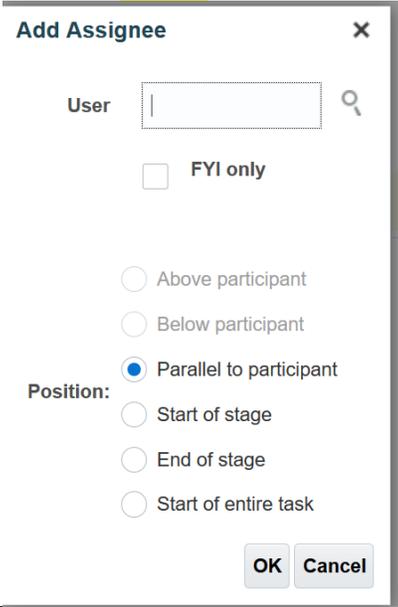
Adding additional approvers is allowed at certain stages. Drill down into the 'Header Stage'.

Click the **Expand** button.

| Section | Stage or Participant  |
|---------|---|
| 1       | Header Preapproval Stage                                    |
| 1.1     | Amanda Thomasson - Requester FYI                            |
| 1.2     | Parallel  |
| 1.2.1   | Pre Approval Header First Responder Wins                    |
| 1.2.1.1 | Amanda Thomasson - Pre Approval Header First Responder Wins |
| 1.2.1.2 | Ruth Ashford - Pre Approval Header First Responder Wins     |
| 2       | Header Stage  |



|    |  |
|----|--|
| 49 | Drill down again by clicking the <b>Expand</b> button.             |
| 50 | Highlight the row under <b>Header Stage First Responder Wins</b> . |

|    |   |
|----|---|
|    | <p>Manage Approvals (Requisition 1195)</p>   |
| 50 | <p>Click the '+' sign to begin adding an approver.<br/>Click the <b>Search</b> icon for User in the <b>Add Assignee</b> window.</p>  |
| 51 | <p>Select the <b>Approver User ID</b>.</p>  |
| 52 | <p>Select a <b>Position</b> (Start of Stage) and click <b>Ok</b>.</p>   |
| 53 | <p>Enter the first name of the <b>Approver</b> to be inserted.</p>  |
| 54 | <p>Make a note of where the user was inserted into the approval path.</p>   |
| 55 | <p>Enter the <b>Last Name of the Approver</b> to be inserted.</p>   |

|    |  |
|----|--|
| 56 | Click the <b>Apply</b> button.         |
| 57 | Click the <b>Back</b> button.          |
| 58 | Click the <b>Submit</b> button.        |
| 59 | Click the <b>OK</b> button to confirm. |