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Approve Warehouse Requisitions - BWH3060

Table of Contents

Approve Warehouse Requisitions - BWH3060 i
Approve Warehouse Requisitions - BWH3060 1

Approve Warehouse Requisitions - BWH3060

Warehouse > Maintenance > Approve Warehouse Requisitions

This page is used to approve line items on an inventory requisition submitted through the Create/Modify Warehouse Requisitions page. One line item at a time is displayed on the page for you to approve or delete.

For requisitions containing multiple line items, click **Post** to approve the entire requisition once all reviewers have approved it. Items must be either approved or deleted prior to posting approval to the requisition. Most of the display-only fields can be updated on the Create/Modify Warehouse Requisitions page, if necessary. Restock requisitions are processed, and purchase order numbers are assigned when the **Allow for Approval Process (Restock Requisition)** field on Warehouse Options is selected.

Approve a warehouse requisition:

Retrieve an existing record	Search for a record. **Requisition Nbr** — Type the six-digit requisition number to be retrieved, if known. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled. Click **Retrieve**. If the requisition number is not known, click Directory.

In the free-form area:

Field	Description
Originator Name	The name of the logged-on user is displayed.
Requestor Name	Type the name of the person or organization requesting the item(s). As you type the data, a drop-down list of corresponding data is displayed. Select the requestor.
Requisition Nbr	Displays AUTO if **Use Automatic CYR Requisition Number Assignment** is selected on the District Finance Options page. The requisition number will be automatically assigned when the requisition is saved.
Date Requested	Type the date of the requisition request. By default, the field is set to the current date; however, it can be changed.
Date Required	Type the date that the requisition is required. By default, the field is set to the current date; however, it can be changed.
Reason	Type the reason for submitting the requisition or edit the current reason. The field can be a maximum of 30 characters. This information is displayed on various reports and on the general ledger.
Campus/Dept	Type the name of the campus submitting the requisition. As you type the data, a drop-down list of corresponding data is displayed. Select the campus/department.
Shipping Addr	Type the address where the requisition is to be shipped or press SPACEBAR to display the list of available purchasing addresses.

Field	Description
Reference Nbr	Type the identification number for this requisition. The field can be a maximum of 15 characters.
Hold	Select to have the item(s) ordered held at the warehouse, or leave the option blank to have the item(s) ordered shipped to the requestor's shipping address.
Accounting Period	The accounting period for this transaction is displayed.

In the upper grid:

Note	Click to add or read a note for the item. If a paper clip is displayed next to the **Note** button, an item note exists. In the note window, review the existing notes or type new or additional notes (justification or instructions) about the item. **This information is for internal use only**. Click **OK** to save the note and close the window. Otherwise, click **Cancel** to close the window.
Details	Click 🔍 to select or view the account code(s) for the selected item. The account code data is displayed in the lower grid.
Seq	The order sequence of items in the requisition is displayed. The sequence number is automatically assigned when an item is added to the requisition.
Item Number	Type an inventory item number for the item to be ordered, or click ⋮ to select an item number from a list.
Item Description	The item description is displayed, which is automatically populated based on the data populated in the **Item Number** field.
Quantity	Type the quantity in units of issue for the requested item.
Unit Price	The unit price of the selected inventory item is displayed. It is automatically populated based on the inventory item record.
Unit of Issue	The unit of issue for the selected inventory item is displayed. It is automatically populated based on the inventory item record.
Long Description	The long description of the selected inventory item is displayed. It is automatically populated based on the inventory item record.
Status	Automatically populated based on the inventory record for the selected item number.
Approval Status	Automatically populated based on the inventory record for the selected item number.
Requisition Total	The calculated total cost for each item in the requisition based on the quantity ordered and unit price per item is displayed.
Click Refresh Totals ❏ Click **Refresh Totals** to update the totals if any amounts are changed in the grid.	
Click Overage Click to view a list of account code overages. The list is only populated if the requisition will cause the budget account used to go over budget. If there is more than one budget account used in the requisition, the list will display each budget account that is over budget as a result of the requisition order.	

In the lower grid:

Account Code	Type the account code components. The account code is comprised of the fund, function, object, subobject, organization, and program codes, and are the individual parts which, taken together, form an account number that uniquely identifies a specific budget category. These codes identify the account used to pay for the item(s) being ordered. The codes must exist in the general ledger and in the User Profile. You can add multiple accounts for each item.
Percent	Type the percent to charge the fund.
Amount	Type the amount to charge the fund.

Refresh Totals. ❑ Click **Refresh Totals** to update the totals if any amounts are changed in the grid.
Calculate Percent. ❑ Click **Calculate Percent** to populate the **Percent** column based on the amount entered in the **Amount** column.
Calculate Amount. ❑ Click **Calculate Amount** to populate the **Amount** column based on the amount entered in the **Percent** column.

Button	**Description**
Path	❑ Click **Path** to display the Approval Path page, which allows you to insert an approver. • Under **Insert Approver**: ◦ Click **Before** or **After** to indicate where the inserted approver will be placed. ◦ In the **Approver** field, click ⌄ to select an approver. • Click **OK** to save the inserted approver and close the window. • Click **Cancel** to close the window without inserting an approver. **Notes**: • If a row is inserted above your name and you select an approver/alternate and click **OK**, the requisition is available to the new approver. When he approves it, the requisition is then available to you for approval. A new approver/alternate cannot be inserted above a Sequence 00 Approver Name (originator/requestor). A row can only be inserted above the logged-on approver/alternate. • Only users who are set up in Security Administration with the proper permissions are displayed in the drop down.
Return	❑ Click **Return** to disapprove the requisition and return the requisition to the originator. The originator can edit the returned requisition and resubmit it.
Skip	❑ Click **Skip** to continue to the next requisition without returning or approving the displayed requisition.
Approve	❑ Click **Approve** to approve the requisition and forward the requisition to the next approver in the path.

Other functions and features:

+Add	Add a row. Click to add a new row.

🗑	Delete a row. Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.
Retrieve	Retrieve data. The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Print requisition details. **Review the report using the following buttons**: Click First to go to the first page of the report. Click ◀ to go back one page. Click ▶ to go forward one page. Click Last to go to the last page of the report. **The report can be viewed and saved in various file formats**. Click 📄 to save and print the report in PDF format. Click 📊 to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included. Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.
Comments	Add comments to the requisition. ❑ Click **Comments** to add or view requisitions comments. A Warehouse Requisition Comments window is displayed. If there is a paper clip icon next to the **Comments** button, a requisition comment exists. In the Warehouse Requisition Comments window, type comments about the requisition. • Click **OK** to save the requisition comment and close the window. • Click **Cancel** to close the window without saving the comment.

<table>
<tr>
<td>Uniform Acct Distr</td>
<td>Distribute amounts.
❑ Click Uniform Acct Distr to assign one or more account codes to the entire requisition. You can split all of the costs for a requisition item between two or more funds. The percentage split does not have to be the same for each fund, but the sum of all percentages must equal 100%.

The Uniform Account Distribution pop-up window is displayed.
❑ Complete the following fields:
<table>
<tr><td>Account Code</td><td>Type the account code to be charged. The account code must exist in the general ledger and in the user profile (the account code must be assigned to the Requestor's user profile in District Administration.).

The account code is comprised of the fund, function, object, subobject, organization, and program codes, and are the individual components that uniquely identify a specific budget category. You can add multiple accounts for each item.

Press the SPACEBAR to view a list of account codes associated with the requestor's user profile. If the account code is not known, click ⋮. The Accounts Codes lookup is displayed.
• Type data in the individual account code component fields and click Search.
• A list of account codes matching your search components is displayed.
• Select the applicable account code from the list. Otherwise, click Cancel to close the Account Codes lookup.
• The Description field is populated with the description of the account.
Note: If an account code is added or changed, click Approve to save the account code and continue with the approval process.</td></tr>
<tr><td>Description</td><td>This field is populated with the account description from the Finance chart of accounts.</td></tr>
<tr><td>Balance</td><td>Displays the fund balance available in the account. A negative balance indicates that the fund has available funds.</td></tr>
<tr><td>Pct</td><td>Type the percent of that item to charge the selected fund. Each requisition must equal 100%.

For example, the percent would be 100% if you paid from one account; however, if you paid from two accounts, you could split the amount 50/50, 75/25, or 60/40 for a total of 100%.</td></tr>
<tr><td>Amount</td><td>Type the amount to charge the selected fund. The amount that will be charged to that account according to the percent entered in the Percent Field.</td></tr>
</table>
❑ Click Refresh Totals to update the totals if any amounts are changed in the grid.
❑ Click Calculate Percent to populate the Percent column based on the amount entered in the Amount column.
❑ Click Calculate Amount to populate the Amount column based on the amount entered in the Percent column.
•
Click OK to apply the amounts.
•
Click Cancel to close the window without applying the amounts.</td>
</tr>
</table>