Microsoft® Business Solutions–Great Plains® Business Portal

Requisition Management User's Guide

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Introduction

Welcome to Microsoft® Business Solutions Requisition Management. Requisition Management is a Web-based business application that you can use to create, approve, and modify purchase requests using Business Portal.

When you submit purchase requests in Requisition Management, the requests are routed to the appropriate individuals for review and approval, and then transferred to Microsoft Business Solutions–Great Plains® for processing.

This introduction includes the following sections:

- *What's in this manual*
- *Symbols and conventions*
- *Additional resources*

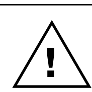
What's in this manual

The Requisition Management User's Guide is designed for users who enter or approve purchase requests, and users who convert purchase requests to purchase orders. This documentation is divided into the following chapters:

- Chapter 1, "Key Concepts," explains user roles, Requisition Management key concepts, and the purchase request life cycle.
- Chapter 2, "Creator Tasks," describes how to enter, print, and modify a purchase request.
- Chapter 3, "Approver Tasks," explains how to approve, reject, and void a purchase request.
- Chapter 4, "Purchaser Tasks," describes how to convert line items from purchase requests into purchase orders.

Symbols and conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Business Portal or the back office might be affected.

This manual uses the following conventions to refer to sections, navigation and other information.

Convention	Description
Creating a purchase request	Italicized type indicates the name of a section or procedure.
File > Print	The (>) symbol indicates a sequence of actions, such as choosing items from a menu or a toolbar or pressing buttons in a window. This example directs you to go to the File menu and choose Print.
Bold	Bold type indicates navigation, tab names, menus, commands, buttons, field names, keywords, and functions.
TAB or ENTER	Small capital letters indicate a key or a key sequence.

Additional resources

In addition to this manual, the following documentation is included with this release of Business Portal.

Manuals

The following PDF manuals are included in the Documentation folder on the Business Portal CD.

Business Portal Installation Guide The Installation Guide (BusinessPortalInstallation.pdf) provides step-by-step instructions for installing Business Portal.

Business Portal Administrator's Guide The Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure Business Portal.

Business Portal User's Guide The User's Guide (BusinessPortalUsersGuide.pdf) helps users complete day-to-day tasks in Business Portal.

Application manuals User and Administrator manuals for each application installed in Business Portal are available in the Documentation folder.

Online help

Online help is available in Business Portal by choosing the Help menu, located at the top-right corner of Business Portal. The items that appear in the Help menu are determined by your role and the applications that are installed.

Your role The help is written for two main audiences: users and administrators. If you're assigned to an administrator role, administrator help will be available to you from the **Help** menu. If you're not assigned to an administrator role, only the user help will be available to you.

Applications that are installed The applications that were installed with Business Portal also determine which items appear in the **Help** menu. For example, if you installed Requisition Management, the Requisition Management help will be available in the **Help** menu.

Keep in mind, each item shown in the **Help** menu is a self-contained help set. This means that if you're currently viewing a user help topic, the administrator help topics won't be available in the **Contents** or **Index** lists of Business Portal Help. Or, if you’re viewing a KPI help topic, the Requisition Management topics won’t be available in the **Contents** or **Index** lists. To view the topics in another help set, you must choose that set from the **Help** menu in Business Portal.

Windows® SharePoint® Services help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by Windows SharePoint Services. General information about these features is provided in Business Portal administrator help. For more detailed information, refer to Windows SharePoint Services help, which can be accessed by clicking the **Help** link at the top left side of any SharePoint page or in any SharePoint Web Part menu. A list of the SharePoint pages included in Business Portal is also provided in Business Portal administrator help.

Chapter 1: Key Concepts

This information explains concepts you need to understand when using Requisition Management. Understanding these concepts will help you manage purchase requests more effectively. Key concepts information is explained in the following sections:

- *Requisition Management overview*
- *Purchase request life cycle*
- *Approval hierarchy*
- *Requisition Management relationship with Great Plains*

Requisition Management overview

Requisition Management is an application that employees, managers, supervisors, and purchasers can use to enter and approve purchase requests in Business Portal. Purchase requests, which are requests for goods or services, are routed to the appropriate users for review and approval, and then line items are transferred to new or existing Great Plains purchase orders. Requisition Management eliminates the need for a paper-based system and provides remote employees with an easy way to enter purchase requests.

You can use Requisition Management to:

- Enter, approve, or reject purchase requests in Business Portal.
- Route purchase requests to a supervisor for review.
- View the status of a purchase request and its history information.
- Transfer line items to new or existing Great Plains purchase orders.
- Consolidate line items from multiple purchase requests into a single purchase order for each vendor.

Purchase request life cycle

The purchase request life cycle includes all the steps or phases a purchase request passes through: creation, submission, and conversion. The life cycle in a company is defined by the approval hierarchy, which the Requisition Administrator sets up. See *Approval hierarchy* on page 6 for more information.

Creation phase

When you enter a purchase request, you're considered the creator. You can save the request and modify it later, or you can submit it to the approver.

Approval phase

After a purchase request is submitted, it's routed to the designated approver, who can void, reject, or approve the request. An approver also can modify a request—

such as adding required information or correcting errors—and save it to act on later.

Action	Description
Void	Stops all further action on the purchase request and sends it to history.
Save	Saves any changes to the purchase request; no other action is taken and the approver can act on the request later.
Reject	Returns the purchase request to the creator, who can modify it and resend to the approver.
Modify	Opens the purchase request, allowing the approver to modify it. For example, if the quantity of the item is incorrect, the approver can enter the correct quantity.
Approve	Routes the purchase request to the next approver in the approval hierarchy.

If the approver has final approver status and the purchase request is within the specified approval limit, the approver can give the request final approval. The purchase request is routed to the purchaser.

Conversion phase

After a purchase request has received final approval, the purchaser—the user who was assigned to the Requisition Purchaser role when Requisition Management was set up—can transfer the request line items to purchase orders. A purchaser also can void or modify a line item—such as adding required information or correcting errors—and save it to act on later.

Action	Description
Void	Stops all further action on the purchase request line.
Save	Saves any changes to the purchase request line; no other action is taken and the purchaser can act on the request line later.
Modify	Opens the purchase request, allowing the purchaser to modify it. For example, if the item quantity is incorrect, the purchaser can enter the correct quantity.
Create	Transfers the purchase request line items to new or existing Great Plains purchase orders.

Approval hierarchy

The Requisition Administrator sets up the approval hierarchy, which controls the overall approval process. This approval hierarchy is the route a purchase request follows from one approver to the next until the request is converted to a purchase order. The hierarchy structure shows the roles or users who must approve a purchase request before it can become a purchase order. As a request is approved, it travels up the approval tree to the role or user in the next highest level.

The following illustration shows an example of an approval hierarchy.

Requisition Management relationship with Great Plains

After a purchase request has been created, passes through the approval process, and receives final approval, a user in the Requisition Purchaser role will transfer the purchase request line items to new or existing Great Plains purchase orders. During the transfer process, the purchaser can consolidate identical line items from multiple purchase requests into one line item for one vendor. The purchaser can transfer line items in Requisition Management without being set up as a Great Plains back office employee.

Chapter 2: Creator Tasks

As a Requisition Creator, you can create, save, modify, delete, view, and submit purchase requests.

If you create a purchase request but are not ready to submit it, you can save the request and submit it at a later time. To add or remove an item, you can return to the request, modify it, and save it again. If you later decide you don't need the purchase request, you can delete it. If you've entered all the necessary information, you can submit the purchase request to your approver.

Creator task information is explained in the following sections:

- *Creating a purchase request*
- *Additional purchase request tasks*
- *Adding a purchase request item*
- *Modifying a purchase request*
- *Viewing a saved purchase request*
- *Deleting a purchase request or line item*
- *Submitting a purchase request*
- *Copying a purchase request*
- *Voiding a purchase request or line item*
- *Resubmitting a purchase request*
- *Printing a purchase request*
- *Viewing the history for a purchase request*

Creating a purchase request

Use the **Purchase Request Details** page to create a purchase request. You can either save or submit the request. If you save it, you can return to it at a later time. If you submit it, the purchase request is routed to your approver.

The information that's required to create a purchase request will vary, depending on how the Requisition Administrator set up the system. For example, you may or may not have access to the **Account**, **Item Number**, **Price**, **Site ID**, or **Vendor ID** line item fields.

To create a purchase request:

1. Open the **Purchase Request**s page.
   Employee > Purchase Requests
2. Click **New Request**. The **Purchase Request Details** page is displayed.
3. Enter a title for the request.
4. Click **New Item** to add an item to the request. The **Add Item** dialog box appears. See *Adding a purchase request item* on page 10 for more information.
5. When you finish adding the items, enter any comments about the purchase request in the **Send comments to the next approver** area.

6. Choose one of the following actions:

    - Click **Save** to save the request. You can return to it at a later time and submit it.

    - Click **Submit** to submit the request to your approver.

    You also can click **Show More Tasks** to view additional tasks and more flexible routing options. See *Additional purchase request tasks* on page 10 for more information.

Additional purchase request tasks

When you're using the **Purchase Request Details** page to create or modify a purchase request, you can click **Show More Tasks** to view additional tasks and more flexible routing options for the request. You can select the following options.

Option	Description
Save as Draft	Saves the purchase request without submitting it to your approver.
Submit and send the purchase request to	Routes the purchase request to someone other than your default approver. Depending on your permissions, you might be able to select your approver.
Submit to final approver	Routes the purchase request to the next person in the approval hierarchy who has final approver status. This option is available if the purchase request amount is within your approval limit, but you don't have final approval permission.
Final Approve	Gives the purchase request final approval and sends it to the Requisition Purchaser. This option is available if the purchase request amount is within your approval limit and you have final approval permission.
Delete	Deletes the purchase request. You can delete a request only if it hasn't been submitted. See *Deleting a purchase request or line item* on page 12 for more information.

Adding a purchase request item

Use the **Add Item** dialog box to add an item to a purchase request. You can add items to a new or saved request, or to a request that was submitted by you but was rejected by an approver.

To add a purchase request item:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. Click **New Request** to add an item to a new purchase request. To add an item to an existing request, select the request and click **Edit Request**. The **Purchase Request Details** page is displayed.

3. Click **New Item** to add items to the request. The **Add Item** dialog box appears.

Depending on the permissions the Requisition Administrator gave you, you might not have access to all the fields on this page. You don't need to enter information in all the fields to save or submit the purchase request.

4. Enter or select an item number.

   If the Requisition Administrator gave you access to add non-inventoried items to purchase requests, you can enter an item number that doesn't exist in Great Plains.

5. Enter a description for the item. If you entered an item number for an existing item, the description from Inventory will appear next to the item number.

6. Enter or select the vendor for this item.

   If you select an item and then click the **Vendor** lookup button, only the vendors assigned to the item will be displayed. You can click **Show All Vendors** to display all the vendors.

7. Select an account.

8. Enter or select the site where the item should be shipped.

9. Enter the price of the item.

10. Enter the quantity to receive.

11. If the item is non-inventoried, enter the unit of measure for the item. If the item is inventoried, the unit of measure will be displayed.

    After you enter the unit of measure, the extended price is automatically calculated (Price * Quantity).

12. Enter or select the date when you need to receive the item.

13. If you have any comments about the item, enter them in the **Comments** field.

14. Click **Save and Close** to add the item to the new purchase request. Repeat steps 3 through 13 to add additional items to the request.

Modifying a purchase request

Use the **Purchase Request Details** page to make changes to a purchase request. You can modify a request if you saved it but haven't yet submitted it. You also can modify a request if it was rejected and sent back to you. However, you can't modify a request if it is being modified by another user, if it was voided, or if the line items were transferred to new or existing Great Plains purchase orders.

To modify a purchase request:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select **My saved requests** and click the arrow button.

3. Select the purchase request to modify and click **Edit Request**. The **Purchase Request Details** page appears.

4. To modify the item information, select one of the following actions:

   - To modify an item, select the item and click **Edit Item**. The **Edit Item** dialog box appears. Modify the item and click **Save and Close** when you've finished.

   - To add an item, click **New Item**. The **Add Item** dialog box appears. Add an item and click **Save and Close** when you've finished. See *Adding a purchase request item* on page 10 for more information.

   - To delete an item, select the item and click **Delete Item**. You can delete an item only if it hasn't been submitted. See *Deleting a purchase request or line item* on page 12 for more information.

   - To void an item, select the item and click **Void Item**. You can void an item if it was previously submitted. See *Voiding a purchase request or line item* on page 14 for more information.

*Depending on the permissions the Requisition Administrator gave you, you might not have access to all the fields in the **Edit Item** and **Add Item** dialog boxes.*

5. Click **Save** to save the modified purchase request or **Submit** to submit it to your approver.

   You also can click **Show More Tasks** to select more options. See *Additional purchase request tasks* on page 10 for more information.

6. Click **OK**.

Viewing a saved purchase request

Use the **Purchase Requests** page to view purchase requests that have been saved but not submitted. Any rejected requests also will be displayed.

To view a saved purchase request:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select **My saved requests** and click the arrow button to display the purchase requests that are saved but not submitted, or that have been rejected.

   You can click the various column headings on this page to sort the purchase requests.

Deleting a purchase request or line item

You can use the **Purchase Request Details** page to delete a purchase request or line item if the request hasn't yet been submitted. The deleted request or line item will be removed from the system.

To delete a purchase request or line item:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select **My saved requests** and click the arrow button.

3. Select the purchase request you're deleting or the request that contains the line items you're deleting. Click **Edit Request**. The **Purchase Request Details** page appears.

4. Complete one of the following tasks:

   - To delete a line item, select the line and click **Delete Item**. A message appears asking if you want to delete the line. Click **Yes**. The line item is removed from the database. Click **Save** to save the modified request or **Submit** to submit it to your approver.

   - To delete the purchase request, click **Show More Tasks**. Select **Delete** and click **OK**. A message appears asking if you want to delete the purchase request. Click **Yes**. The request and all of its line items are removed from the database.

Submitting a purchase request

Use the **Purchase Request Details** page to submit a purchase request to your approver. Before you submit a purchase request, the Requisition Administrator must add you to the approval hierarchy. If you are not in the approval hierarchy, you still can create and save a request, but you won't have permission to submit it. See *Approval hierarchy* on page 6 for more information.

To submit a purchase request:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select **My saved requests** and click the arrow button.

3. Select the purchase request to submit.

4. Click **Edit Request**. The **Purchase Request Details** page appears.

5. Click **Submit** to submit the request to your approver.

   You also can click **Show More Tasks** to select more options. See *Additional purchase request tasks* on page 10 for more information.

6. Click **OK**.

Copying a purchase request

Use the **Purchase Request Details** page to create a purchase request by copying an existing request. You can copy purchase requests only if the Requisition Administrator set up the system to allow copying.

You can copy purchase requests if they've been:

- Saved but not submitted for approval
- Rejected and sent back to you
- Voided and sent to history

To copy a purchase request:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select one of the following options and click the arrow button:

   Assigned to me Displays the requests assigned to you.

   Assigned to my roles Displays the requests assigned to the role you select.

   My open requests Displays your submitted requests that haven't been transferred to purchase orders yet.

   My saved requests Displays your unsubmitted and rejected requests.

   My completed requests Displays your requests that were voided or the line items that were transferred to purchase orders.

   Assigned to my subordinates Displays the requests assigned to the subordinate you select. Subordinates are users who are lower than you in the approval hierarchy. This option is available if the Requisition Administrator set you up as an extended approver, allowing you to approve requests assigned to your subordinates.

3. Select the purchase request to copy.

4. Click **Copy Request**. The **Purchase Request Details** page appears.

5. Enter a title for the copied request.

6. To modify the copied request, click **New Item** to add an item, or select the item and click **Edit Item** or **Delete Item** to modify or delete an item. For more information, see *Adding a purchase request item* on page 10, *Modifying a purchase request* on page 11, and *Deleting a purchase request or line item* on page 12.

7. Click **Save** to save the copied request or **Submit** to it to your approver.

   You also can click **Show More Tasks** to select more options. See *Additional purchase request tasks* on page 10 for more information.

8. Click **OK**.

Voiding a purchase request or line item

You can use the **Purchase Request Details** page to void a purchase request or line item if the request has been rejected by an approver. When you void a purchase request, both the request and all of its line items are voided and moved to history. If you void a line item, it will remain on the request, but it will be designated as having been voided.

A purchase request must include at least one non-voided line item if you want to resubmit it for approval.

To void a purchase request or line item:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select **My saved requests** and click the arrow button.

3. Select the request you're voiding or the request that contains the line item you're voiding and click **Edit Request**. The **Purchase Request Details** page appears.

4. Complete one of the following tasks:

   - To void an item, select the item and click **Void Item**. A message appears asking if you want to void the line. Click **Yes**. The line item will remain on the request, but will be designated as voided. Click **Save** to save the request or **Resubmit** to resubmit it. See *Resubmitting a purchase request* on page 15 for more information about resubmitting purchase requests.

   - To void the request, click **Show More Tasks**. Select **Void** and click **OK**. A message appears asking if you want to void the purchase request. Click **Yes**. The request and all of its line items are voided and moved to history.

Resubmitting a purchase request

You can use the **Purchase Request Details** page to resubmit a purchase request if it has been rejected by an approver. You also can select a specific user or role to resubmit the request to, if you have permission to change your approver and you have more than one approver in the hierarchy.

To resubmit a purchase request:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select **My saved requests** and click the arrow button.

3. Select the request to resubmit and click **Edit Request**. The **Purchase Request Details** page appears.

4. Make any necessary changes to the request. See *Modifying a purchase request* on page 11 for more information.

5. Complete one of the following tasks:

   - To resubmit the request to your default approver, click the **Resubmit** button.

   - To resubmit the request to a specific user or role, click **Show More Tasks**. Select **Resubmit and send the purchase request to** and select a user or role from the list. Click **OK**.

Printing a purchase request

You can use the **Printer-Friendly Version** page to print a purchase request. You don't need to save the request before printing it.

To print a purchase request:

1. Open the **Purchase Request**s page.
   Employee > Purchase Requests

2. In the **Filter by** list, select one of the following options and click the arrow button:

   Assigned to me Displays the requests assigned to you.

   Assigned to my roles Displays the requests assigned to the role you select.

   My open requests Displays your submitted requests that haven't been transferred to purchase orders yet.

   My saved requests Displays your unsubmitted and rejected requests.

   My completed requests Displays your requests that were voided or the line items that were transferred to purchase orders.

   Assigned to my subordinates Displays the requests assigned to the subordinate you select. Subordinates are users who are lower than you in the approval hierarchy. This option is available if the Requisition Administrator set you up as an extended approver, allowing you to approve purchase requests assigned to your subordinates.

3. Select the request to print and click **View Request**. The **Purchase Request Details** page appears.

4. Click **Printer-Friendly Version** to display a printer-friendly version of the request.

   Voided items appear in strikethrough text.

5. Choose **File** > **Print** to print the request.

Viewing the history for a purchase request

You can use the **Purchase Request Approval History** page to view history information for purchase requests that have been submitted, approved, submitted to the final approver, final approval, returned, rejected, resubmitted, or voided. When you view history for a submitted request, you can see when the request was approved, who approved it, when the line items were transferred to new or existing Great Plains purchase orders, and who transferred them.

To view the history for a purchase request:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select **My completed requests** and click the arrow button to view your voided purchase requests or the requests that have been transferred to Great Plains as a purchase order.

3. Select the request to view and click **View Request**. The **Purchase Request Details** page appears.

4. Click **Approval History**. The **Purchase Request Approval History** page appears. The **Approval history record** list displays who has taken action on the request and what the last action was.

5. To view an earlier version of the request, select an approval history record from the list.

6. Close the page when you’ve finished.

Chapter 3: Approver Tasks

If you're assigned to the Requisition Approver role and a purchase request is submitted to you, you'll review the request and, if needed, modify it by adding, modifying, or voiding line items. Then you'll approve, final approve, return, void, or reject the request.

This information describes the steps you need to follow when approving purchase requests. Approver task information is explained in the following sections:

- *Approving a purchase request*
- *Additional approval tasks*
- *Modifying a purchase request before approving it*
- *Returning a purchase request to another user*
- *Rejecting a purchase request*
- *Voiding a purchase request or line item*

Approving a purchase request

You can use the **Purchase Request Details** page to approve a purchase request. You also can use this page to return, reject, or void the request.

To approve a purchase request:

1. Open the **Purchase Requests** page.
   Manager > Purchase Requests

2. In the **Filter by** list, select one of the following options:

   Assigned to me Displays the requests assigned to you.

   Assigned to my roles Displays the requests assigned to the role you select.

   Assigned to my subordinates Displays the requests assigned to the subordinate you select. Subordinates are users who are lower than you in the approval hierarchy. This option is available if the Requisition Administrator set you up as an extended approver, allowing you to approve purchase requests assigned to your subordinates.

3. Select the request to approve and click **Edit Request**. The **Purchase Request Details** page appears.

4. If you have any comments about the request, enter them in the **Comments** field.

5. Click **Approve** to approve the request.

   You also can click **Show More Tasks** to view additional tasks and more flexible routing options. See *Additional approval tasks* on page 20 for more information.

   Before you give the request final approval, be sure all the item fields are completed.

6. Click **OK**.

Additional approval tasks

When you're using the **Purchase Request Details** page to approve or modify a purchase request, you can click **Show More Tasks** to view additional tasks and more flexible routing options for the request. You can select the following options.

Option	Description
Save for later	Saves the request without approving it.
Approve and send the purchase request to	Approves the request and routes it to someone other than your default approver. Depending on your permissions, you might be able to select your approver, or the Requisition Administrator might assign a default approver to you.
Submit to final approver	Routes the request to the next person in the approval hierarchy who has final approver status. This option is available if the purchase request amount is within your approval limit, but you don't have final approval permission.
Final Approve	Gives the request final approval and sends it to the Requisition Purchaser. This option is available if the purchase request amount is within your approval limit and you have final approval permission.
Return purchase request to	Returns the request to the user you select. See *Returning a purchase request to another user* on page 21 for more information.
Reject	Returns the request to its creator. See *Rejecting a purchase request* on page 22 for more information.
Void	Voids the request and sends it to history. See *Voiding a purchase request or line item* on page 22 for more information.

Modifying a purchase request before approving it

You can use the **Purchase Request Details** page to modify a purchase request before approving. You should modify the request if it is missing information or has incorrect information. For example, if the creator entered the incorrect vendor or didn't enter the item number for an item, you can add the correct information.

To modify a purchase request before approving it:

1. Open the **Purchase Requests** page.
   Employee > Purchase Requests

2. In the **Filter by** list, select one of the following options:

   Assigned to me Displays the requests assigned to you.

   Assigned to my roles Displays the requests assigned to the role you select.

   Assigned to my subordinates Displays the requests assigned to the subordinate you select. Subordinates are users who are lower than you in the approval hierarchy. This option is available if the Requisition Administrator set you up as an extended approver, allowing you to approve purchase requests assigned to your subordinates.

3. Select the request to modify and click **Edit Request**. The **Purchase Request Details** page appears.

4. To modify the item information, select one of the following actions:

   - To modify an item, select the item and click **Edit Item**. The **Edit Item** dialog box appears, where you can modify the item. Click **Save and Close** when you've finished.

   - To add a new item to the request, click **New Item**. The **Add Item** dialog box appears, where you can add an item. Click **Save and Close** when you've finished.

   - To void an item on the request, select the item, click **Void Item**, and click **Save**. The voided item is moved to history.

5. If you have any comments about the request, enter them in the **Comments** field.

6. Click **Approve** to approve the request.

   You also can click **Show More Tasks** to view additional tasks and more flexible routing options. See *Additional approval tasks* on page 20 for more information.

Returning a purchase request to another user

You can use the **Purchase Request Details** page to return a purchase request to another user for changes or additional information. For example, you might return a request to another user for changes if you need clarification, if you think an item should be removed, or if you think a different vendor should be used.

You can return a purchase request to a user only if the request has already been approved at least once.

The user you're returning the purchase request to will receive a notification that the request has been returned. When any necessary changes are made, that user can again submit the request.

To return a purchase request to another user:

1. Open the **Purchase Requests** page.
   Manager > Purchase Requests

2. In the **Filter by** list, select one of the following options:

   Assigned to me Displays the requests assigned to you.

   Assigned to my roles Displays the requests assigned to the role you select.

   Assigned to my subordinates Displays the requests assigned to the subordinate you select. Subordinates are users who are lower than you in the approval hierarchy. This option is available if the Requisition Administrator set you up as an extended approver, allowing you to approve purchase requests assigned to your subordinates.

3. Select the request to return and click **Edit Request**. The **Purchase Request Details** page appears.

4. Enter your comments about the request in the **Comments** field.

5. Click **Show More Tasks**.

6. Select **Return purchase request to** and select a user or role.

   Only the users or roles who previously approved the request are included in the list. If the purchase request was previously rejected, only the users who approved the request since it was resubmitted will be listed.

7. Click **OK**. The user you're returning the purchase request to will receive a notification and can resubmit the request for approval.

Rejecting a purchase request

You can use the **Purchase Request Details** page to reject a purchase request. For example, you might want to reject a request if you don't think the purchase is necessary.

When you reject a request, it will be routed back to its creator. That user then can void the request or resubmit it for approval.

To reject a purchase request:

1. Open the **Purchase Requests** page.
   Manager > Purchase Requests

2. In the **Filter by** list, select one of the following options:

   Assigned to me Displays the requests assigned to you.

   Assigned to my roles Displays the requests assigned to the role you select.

   Assigned to my subordinates Displays the requests assigned to the subordinate you select. Subordinates are users who are lower than you in the approval hierarchy. This option is available if the Requisition Administrator set you up as an extended approver, allowing you to approve purchase requests assigned to your subordinates.

3. Select the request to reject and click **Edit Request**. The **Purchase Request Details** page appears.

4. Enter any comments about the request in the **Comments** field.

5. Click Show **More Tasks.**

6. Select **Reject**.

7. Click **OK**. The request will be routed to its creator.

Voiding a purchase request or line item

You can use the **Purchase Request Details** page to void a purchase request or line item if the request or line item is no longer valid. You can void a request or line item only if the request has been submitted and none of the line items have been transferred to a purchase order.

When you void a purchase request, both the request and all of its line items are voided and moved to history. If you void a line item, the line item will remain on the purchase request, but the line item will be designated as having been voided.

The purchase request must include at least one non-voided line item before it can be approved.

To void a purchase request or line item:

1. Open the **Purchase Requests** page.
   Manager > Purchase Requests

2. In the **Filter by** list, select one of the following options:

   Assigned to me Displays the requests assigned to you.

   Assigned to my roles Displays the requests assigned to the role you select.

   Assigned to my subordinates Displays the requests assigned to the subordinate you select. Subordinates are users who are lower than you in the approval hierarchy. This option is available if the Requisition Administrator set you up as an extended approver, allowing you to approve purchase requests assigned to your subordinates.

3. Select the request you're voiding or the request that contains the line item you're voiding and click **Edit Request**. The **Purchase Request Details** page appears.

4. Complete one of the following tasks:

   - To void an item, select the item and click **Void Item**. A message appears asking if you want to void the line. Click **Yes**. The line item will remain on the request, but the line item will be designated as having been voided. Click **Save** to save the request or **Approve** to approve it.

   - To void the request, click **Show More Tasks**. Select **Void** and click **OK**. A message appears asking if you want to void the purchase request. Click **Yes**. The request and all of its line items are voided and moved to history.

Chapter 4: Purchaser Tasks

Use the following information to convert purchase requests from Business Portal into purchase orders in the Great Plains back office system. Purchaser task information is explained in the following sections:

- *How purchase requests are converted to purchase orders*
- *Converting purchase request items to a purchase order*
- *Modifying a purchase request line item*
- *Voiding a purchase request line item*

How purchase requests are converted to purchase orders

When an approver gives a purchase request final approval, the request is routed to the purchaser, who can convert the request line items into new or existing purchase orders in Great Plains.

During the transfer process, you can consolidate identical line items from different purchase requests into one line item for one vendor. For example, if three users request the same filing cabinet from the same vendor, those line items can be consolidated into one line item with a quantity of 3.

To be consolidated, the following attributes of the line items must be the same:

- Item number
- Description
- Unit of measure
- Site ID
- Vendor
- Account
- Unit price
- Required-by date

If the line items aren't identical, you might be able to modify the line items so they can be consolidated into one line item, depending on how the Requisition Administrator set up the system. See *Modifying a purchase request line item* on page 26 for more information.

Converting purchase request items to a purchase order

Use the **Create Purchase Orders** page to select the line items to transfer to new or existing Great Plains purchase orders for a vendor. All purchase request line items that have been given final approval can be transferred to Great Plains. Depending on how the Requisition Administrator set up the system, you might be able to modify the line items before you convert them to purchase orders in Great Plains. See *Modifying a purchase request line item* on page 26 for more information.

To convert purchase request items to a purchase order:

1. Open the **Create Purchase Orders** page.
   Purchasing > Requisitions

2. In the **Filter by** list, select a vendor and click the arrow button to display the purchase requests that have been given final approval for that vendor.

3. Select each item to transfer to a purchase order. You can select up to 300 items at one time.

4. Verify that the information on each request is correct. To modify or void any line items, see *Modifying a purchase request line item* on page 26 and *Voiding a purchase request line item* on page 27.

5. You can select **Consolidate identical items on purchase order** to consolidate identical items. All items with the same item number, item description, unit of measure, site, vendor, account, price, and required-by date will be consolidated onto one line. See *How purchase requests are converted to purchase orders* on page 25 for more information.

   If you consolidate identical items, line item comments aren't included on the purchase order.

6. You can select **Add to existing purchase order** and select a purchase order from the list to add line items to an existing purchase order. The line items on the existing purchase order must have the same vendor and currency as the line items you're adding.

7. Click **Create**, and then remain on the page until the processing has been completed:

   - If the process is successful, the **Purchase Order Confirmation** dialog box appears, displaying the purchase order number and the vendor information.

   - If the process is not successful, the **Purchase Order Failure** dialog box appears, displaying the reason why an item was not added to the purchase order.

Modifying a purchase request line item

Use the **Create Purchase Orders** page to modify purchase request line items before transferring them to a purchase order. For example, you might modify line items if they aren't identical and you want to consolidate them into a single line item.

You can modify purchase request line items only if the Requisition Administrator set up the system to allow modifying purchase requests after they've received final approval.

To modify a purchase request line item:

1. Open the **Create Purchase Orders** page.
   Purchasing > Requisitions

2. In the **Filter by** list, select a vendor and click the arrow button to display the purchase requests that have been given final approval for that vendor.

3. Select the item to modify.

4. Click **Edit Item**. The **Edit Item** dialog box appears, where you can modify the item.

5. After you've finished modifying the item, click **Save and Close**.

   You then can convert the line item to a purchase order. See *Converting purchase request items to a purchase order* on page 25 for more information.

Voiding a purchase request line item

Use the **Create Purchase Orders** page to void a purchase request line item if it's no longer valid. You can void a line item only if it hasn't been transferred to a purchase order. When you void a purchase request line item, it will be moved to history.

You can void purchase request line items only if the Requisition Administrator set up the system to allow modifying purchase requests after they've received final approval.

When you void line items on a purchase request that has received final approval, the status of the request will depend on whether any of the line items have already been transferred to a purchase order:

- If any line items have been transferred to a purchase order, and you void the remaining line items that can be voided, the purchase request is moved to history and the status of the request is Transferred To Purchase Order.
- If no line items have been transferred to a purchase order, and you void the line items that can be voided, the purchase request is moved to history and the status of the request is Voided.

To void a purchase request line item:

1. Open the **Create Purchase Orders** page.
   Purchasing > Requisitions

2. In the **Filter by** list, select a vendor and click the arrow button to display the purchase requests that have been given final approval for that vendor.

3. Select the item to void.

4. Click **Void Item**. A message appears asking if you want to void the item. Click **Yes**. The voided item is moved to history.

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Documentation Comment Form

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January 2005

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