

# Approval of Purchase Requisitions

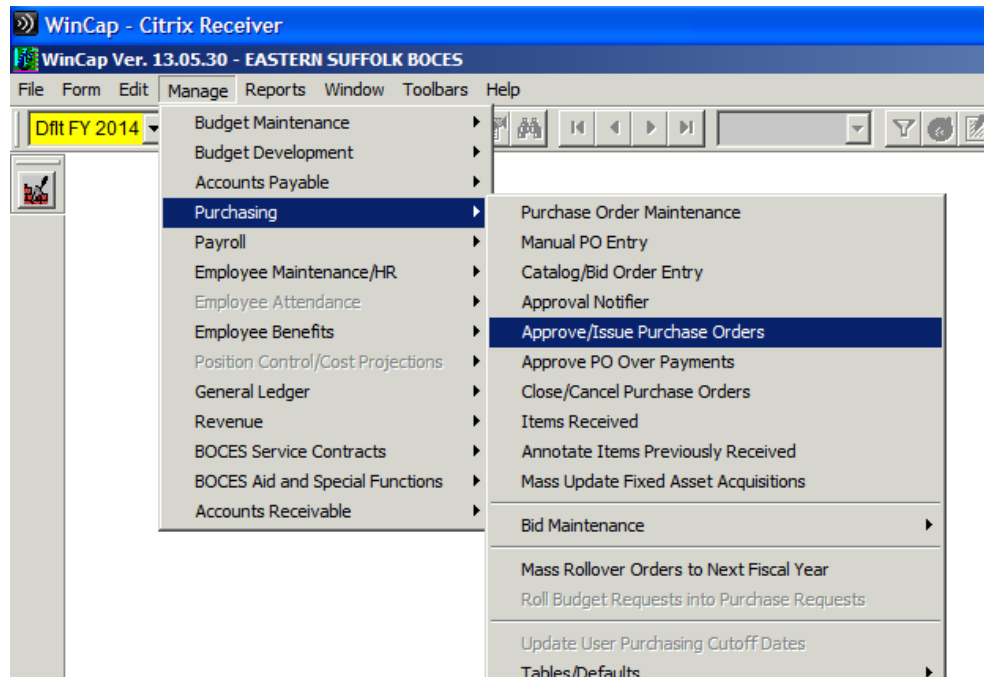
2013 Training Session

## Mass Approving Requisitions

The purpose of the Mass Approve/ Issue Purchase Order option is to allow a rapid review and dispensation of purchase requests. The three main purposes of the Mass Approval are as follows:

- Approvals have been set-up to be in line with ESBOCES Board Policy and Administrative Regulations.
- An administrator or supervisor reviewing the requests of their staff as to the appropriateness for the purchase of goods or services.

Go to: **Manage/ Purchasing/ Approve/Issue Purchase Orders**



The following selection screen will appear allowing the user to set criteria for the purchase requisitions to be displayed. **A default user criteria screen has been set-up for each approver.** There is no need to enter any dates or requisition numbers. When left blank, all requisitions pending your approval will be listed in requisition number order.

Mass Approve/Issue/Disapprove Requests

Fiscal Year: 2014 Criteria: Last Run

Document ID: From: To:

Order Date: From: To:

Bid Requests Only  
 Manual Orders Only  
 Disapproved Request(s)

Approval Level:  
 1  2  3  4  
 5  6  7  8  
 9  Entry in progress

Vendor: Blank  
Requisitioner: Blank  
Requestor: DIRBUS Dir of Business Services  
Department: Blank  
Buyer: Blank  
Catalog/Bid ID: Blank

Where:

OK Cancel

Once the appropriate criteria is displayed, **click OK**

The system will then search for all records that meet the specified criteria. In the above example, all requests that have been approved at level 6 will display.

If any records match the criteria, the following screen will appear. The first grid shows all the purchase requisitions that fit the criteria, with columns to display information about the requisitions such as pending requisition numbers, vendor name, attachments, notes, etc. The second and third grids show additional information about the highlighted requisition. Use the scroll bars to view additional fields of information for the requisitions in each of the three grids.

2014 DocNumber Search By DocNumber

Sel	DocNumber	Description	Amount	Vendor	Vendor Order Name	Attach	Notes	Requisition
	PND-00012	Pencils	30.91	036714	W B Mason Co., Inc.		Judy Speizio 05/13/13@02:04pm:	11300
	PND-00024	Audio Visual Supplies and Equipment	836.85	030619	Pyramid School Products			11300
	PND-00028	PENS	26.00	036714	W B Mason Co., Inc.			11300
	PND-00038	Pens	33.00	036714	W B Mason Co., Inc.			17103
	PND-00066	Fine and Recycled Paper	202.20	001062	Paper Mart, Inc.			17103
	PND-00067	Fine and Recycled Paper	121.15	020135	Graphic Paper, Inc.			17103
	PND-00069	COMPUTER	300.00	000096	Dell Marketing L.P.		Linda DelPonte 05/15/13@09:59am: HELLO	15141
	PND-00075	pen	19.46	036714	W B Mason Co., Inc.		Amawasri Bottachiarri 05/15/13@11:32am:	999998
	PND-00077	pen	81.00	036714	W B Mason Co., Inc.			15521

Select To End Deselect To End Select All Deselect All

Description	Quantity	Unit Cost	Unit of Measure	Item ID	Category	Extension	Catalog
Audio, Card Reader (Language Master), Dual Speed, 2 Watt, 4"	5.00	166.3500	Each	00008	13AVSUP	831.75	CALIFON
Battery, Alkaline Duracell 9V	5.00	1.0200	Each	00012	13AVSUP	5.10	RAYOVA

Budget Code	Encumbrance	EncPct	Enc.Outstndng	Avail.Balance	Amount	Percent	Shipping	ShpPct	Discount	Ds
A001-1312-300-0001-00	836.85	0.00%	1146.07	12508.85	836.85	100.00%	0.00	0.00%	0.00	1%

If you want to view the actual purchase requisition, double click on the requisition number and the requisition will open. Double clicking on any of the fields will bring up additional information if it is available. For example, double clicking on the Vendor field will bring up the complete vendor information.

**Mass Approve/Issue/Disapprove Requests**

2014 DocNumber [ ] Search By DocNumber [ ]

SEL	DocNumber	Description	Amount	Ven
	PND-00012	Pencils	30.91	036
O	PND-00024	Audio Visual Supplies and Equipment	836.85	030
L	PND-00028	PENS	26.00	036
	PND-00029	PENS	33.00	036
		Disapprove at originator approval level	202.20	001
		Disapprove at last approval level	121.15	020
A	PND-00063	COMPUTER	300.00	000

Select To End Deselect To End

Description	Quant
Pens	4
Pencils	2

Budget Code	Encumbrance	EncPct	Enc.Outstndng	Avail.Balance	Amount	Percent	Shipping	ShpPct	Discount
A623-7014-300-0001-00	33.00	0.00%	0.00	3445.80	33.00	100.00%	0.00	0.00%	0.00

After the file has been reviewed, indicate the action to be taken in the SEL Column.

To Approve the requisition (A), simply click in the SEL box of the appropriate purchase requisition.

For other actions, right clicking will bring up a list of options:  
 O – Disapprove at Originator Level,  
 L – Disapprove at the last approval level.

When you disapprove a requisition a text box opens for you to enter a reason or note. You can cancel or enter a note and hit OK.

If an incorrect selection is made, click once to return the field to blank.

After all necessary actions have been indicated; left click on the Save Icon.





## Approver Levels

Approval levels are assigned by WinCap, based on the Signing Authority Administrative Regulation and criteria developed by the Department of Business Services. The number/identifier WinCap assigns a user denotes their approval level per the pre-established approval level hierarchy.

Approval Level Numbers are as follows:

<b><u>Level #</u></b>	<b><u>Description</u></b>
<b>8</b>	<b>Building/Program Support Staff</b>
<b>7</b>	<b>Building Principals/Program Administrators, up to \$2,000</b>
<b>6</b>	<b>Divisional Administrators, up to \$5,000</b>
<b>5</b>	<b>Administrative Council and Cabinet, over \$5,000</b>
<b>4</b>	<b>Special Approvals, Technology, Health &amp; Safety, Building Projects, Grants</b>
<b>3</b>	<b>Purchasing Office Support Staff</b>
<b>2</b>	<b>Purchasing Technicians (Buyers)</b>
<b>1</b>	<b>Purchasing Agent</b>