MANCHESTER 1824
The University of Manchester

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Approve a requisition

iProc Approver | Oracle Financials

This guide is intended for iProc Approvers who have requisitions to approve in the iProcurement (iProc) part of the Oracle Financials system.

You can access Oracle Financials via this link: http://financelive.fin.manchester.ac.uk/

To approve a requisition you will need to:

1. Click the **PO Internet Approver (UOM)** responsibility to open iProc. A list of requisitions awaiting your approval will appear in date order, with the most recent requisitions at the top of the list.

2. You can open a requisition to see further details in one of three ways. Click on either the:
   - **Requisition** number
   - **Description**
   - **Details** icon

   Please ensure you have followed all of the approval checks that follow on every requisition before approving it.

3. Check if there's a **Justification** message. This has been input by the Requisitioner for your information. The message may require a response from you before approving the requisition (refer to the *Respond to a requisition* guide).

4. Check for any **Attachments** with this requisition. If attachments are provided there will be a clickable link labelled **View** to open the information.

> **If the total of the requisition is over £5,000 there is a need for 3 quotations as per the Financial Regulations and procedures. The Requisitioner should have attached these quotes for you to review, or added a justification as to why a single quote has been supplied.**

5. Check the **Quantity** and **Price** on all the lines and all other line details.

6. If you are not already on the *Full Requisition Detail* screen, click on any of the **Full Details** icons on any of the requisition lines. More information will be shown on the *Full Requisition Detail* screen.

7. Check the **Supplier** details to ensure that they are appropriate for the goods/services requested.

9. Check the **Charge Account** (finance code) information is correct on all lines.

Charged to a Project Code

- If the Requisitioner has charged the requisition to a **Project code**, the *Charge Account* will begin with an **R** or a **P**, then 6 numbers.
- A Project code is the research/project budget the cost will be charged to.
- The *Description* field tells you more about the Project code used and shows the 3 letter school code that the Project belongs to.
- Check that the correct Project code has been used for the requisition/requisition line.
- The *Task Number* and *Task Name* are displayed at the right of the screen. Tasks are a form of category code and the *Task* has been selected by the Requisitioner. When using Project codes only some Task codes are available due to spending restrictions placed on the funding.
- Check that the correct *Task* has been used for the requisition/requisition line.

Charged to an Activity Code

- If the Requisitioner has charged the requisition to an **Activity code**, the *Charge Account* will begin with **2 letters**, followed by **5 numbers**.
- An Activity code is made up of 6 segments. The first segment, Activity, refers to the code the requisition will be charged to. This is a General Ledger, or GL code. This code has been entered by the Requisitioner.
- The *Description* tells you more about the Activity code used and the 3 letter school code and the name of the account are shown.
- Check that the correct Activity code has been used for the requisition/requisition line.
- The second segment of the *Charge Account* is the **IE code (Income and Expenditure)**. This is driven by the *Category* that the Requisitioner selected on the requisition. Category is a way of labelling expenditure. It allows us to report accurate spends to external providers of funding, as well as allowing us to track category spend which can then be used by strategic Procurement in negotiations with suppliers. The Requisitioner chooses a Category code which drives the IE (Income and Expenditure) code in the *Charge Account*.
- Check that the IE Code is correct for the items on the requisition (the second segment of the *Description* field shows you an explanation of the IE code).

Split Charges

- If the Requisitioner has split the charge for the requisition across more than one finance code, you will see that the **same requisition line has more than one *Charge Account*** shown. Eg 70% of the total cost of the requisition (or requisition line) might be charged to one Activity/Project code & the remaining 30% of the total cost might be charged to another Activity/Project code.
- Use the fields *Charge Account*, *Description*, *Alloc Value*, *Quantity* and *Total Price* to see how the charge has been split.

10. After checking the *Charge Account* details, click on the **Approvals** tab to return to the main approvals list.

11. Click on the **Status** for the requisition you wish to view. The *Approval History* screen shows you who this requisition has been sent to for approval and who the requisition is currently pending with.

You may not be the only Approver for some requisitions because:

- more than one finance code has been used for the requisition
- the requisition total is over £5,000 or £25,000 and so it requires high-value approval, as well as your approval.

12. Click on the **Approvals** tab to return to the main approvals list.

13. If any of the details are incorrect you can either use **Respond** to send a message to the approver (refer to the *Respond to a requisition* guide), or you can **Reject** the requisition (refer to the *Reject a Requisition* guide).

14. Once you have completed all of the necessary checks and are happy the information is correct, you can approve the requisition. Select the requisition on the left and then click **Approve**.

By approving this requisition you are confirming that you are adhering to the University's Financial Regulations and Procedures and have made the necessary checks.

15. You'll receive a *Confirmation* message that you have now approved this requisition.

Remember, there may be other Approvers who need to approve this requisition before it can move onto the purchase order stage. If required, this requisition will go on for further electronic approval.

Once a requisition has gone through all the required approvals it will be sent to your Buyers to convert the requisition into a purchase order.

16. Click **Go** to refresh your approvals list. You'll notice that the requisition you have just approved will disappear from the list. This is because the default view for this screen is *Requisitions to Approve*. The view can be changed to show *Requisitions I Have Approved*, if necessary (refer to the *Viewing approved requisitions* guide).

17. Repeat from step 2 to approve another requisition.

Once approved, the requisition will be sent to the Operational Buyer for your School or Unit to be converted into a purchase order to be sent out to the supplier.

If this is an eMarketplace requisition, it will be sent automatically to the supplier once fully approved.