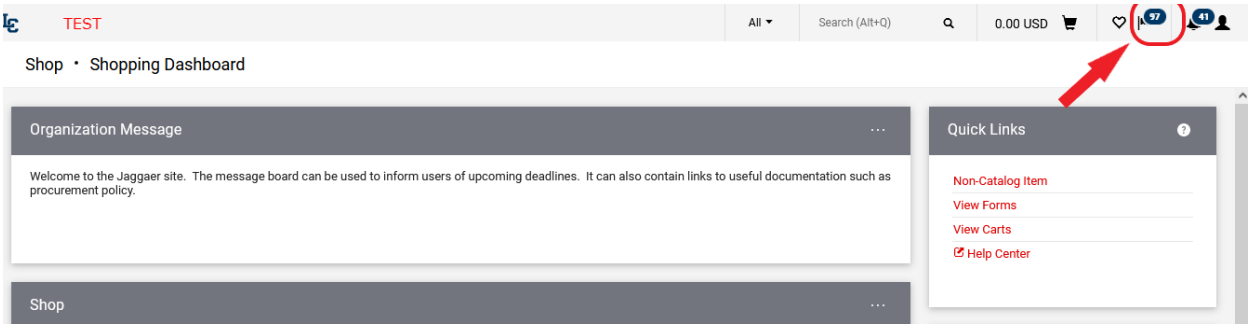
Jaggaer eProcurement System: Process Guides

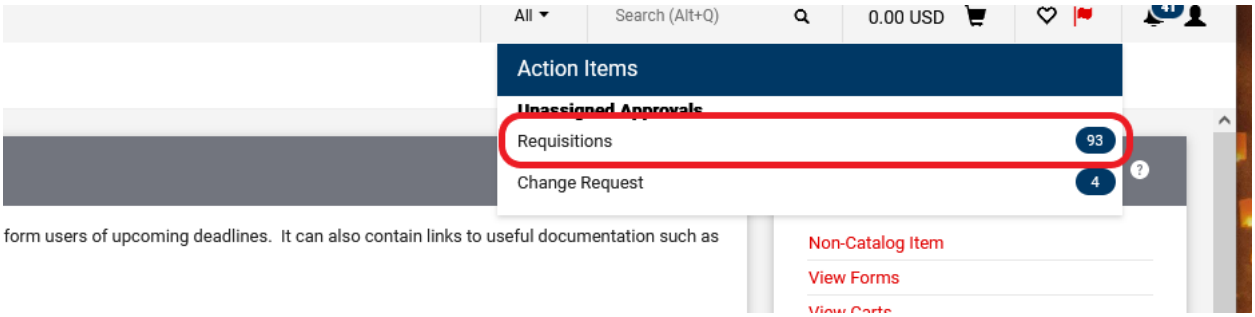
How to approve a requisition

Overview: Purchase Requisitions (PR's or Requisitions) are entered by Requesters and routed to Approvers for review and approval. Approvers can access and approve Requisitions in the Jaggaer system, or by clicking on the link in the approval email received. Requisitions can also be sent back to the Requester, for updates or corrections.

1. Navigate to the Jaggaer site.
2. Click on the **Action Item flag** in the top right corner of the screen.

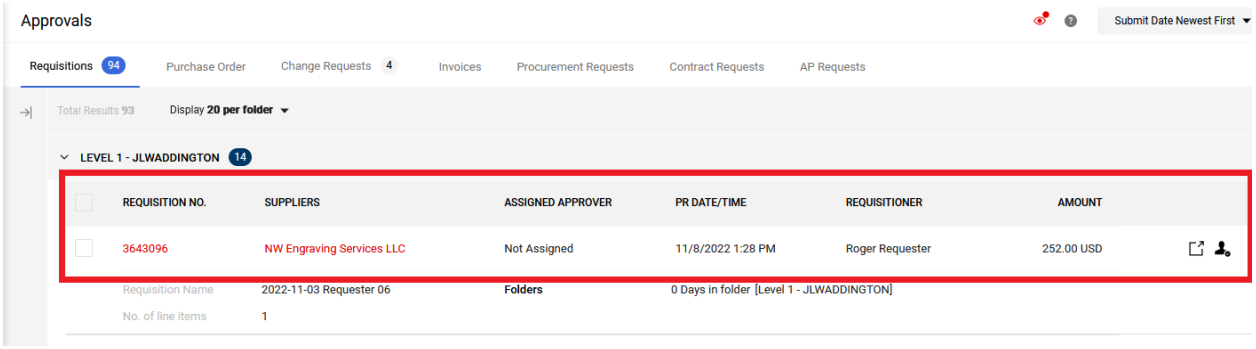


3. The **Action Items** window will open. Click on the type of item to approve, most commonly **Requisitions**.

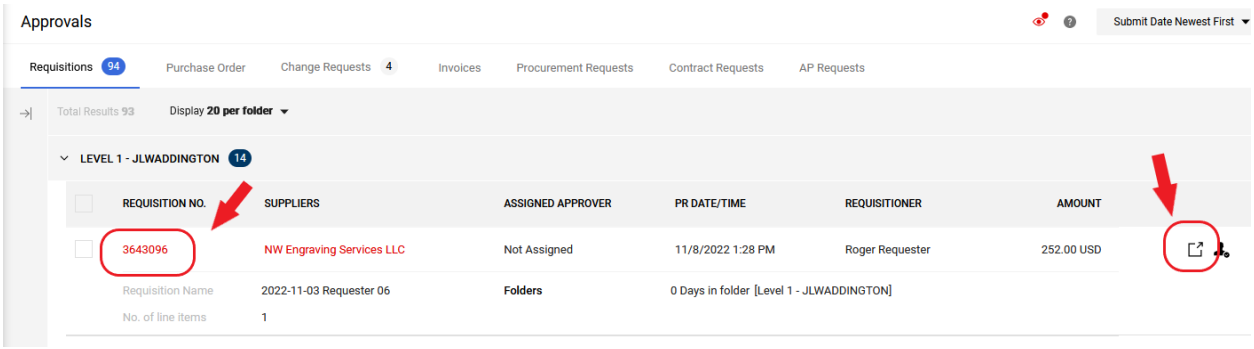


4. The Approvals section will now load, displaying all of the requisitions that need approval.
5. From this Approvals view, the following details are present for each Requisition.

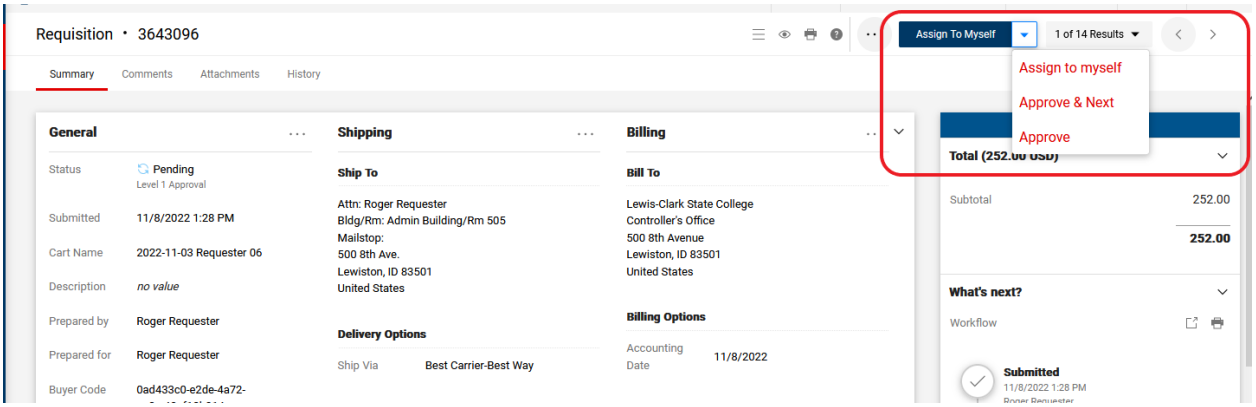
a. The Requisition No, Supplier, Assigned Approver, Purchase Requisition (PR) date and time of creation, the Requisitioner (the user who entered the Requisition) and the amount.



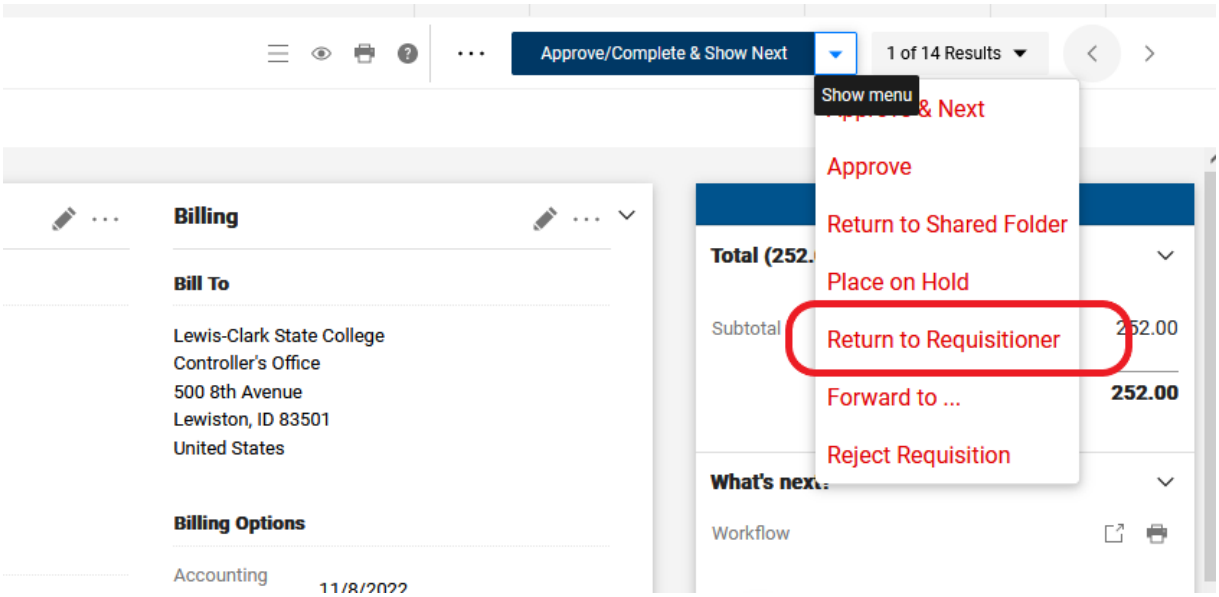
6. Click on the **Requisition number** or the **Quick View icon** to view the requisition details.

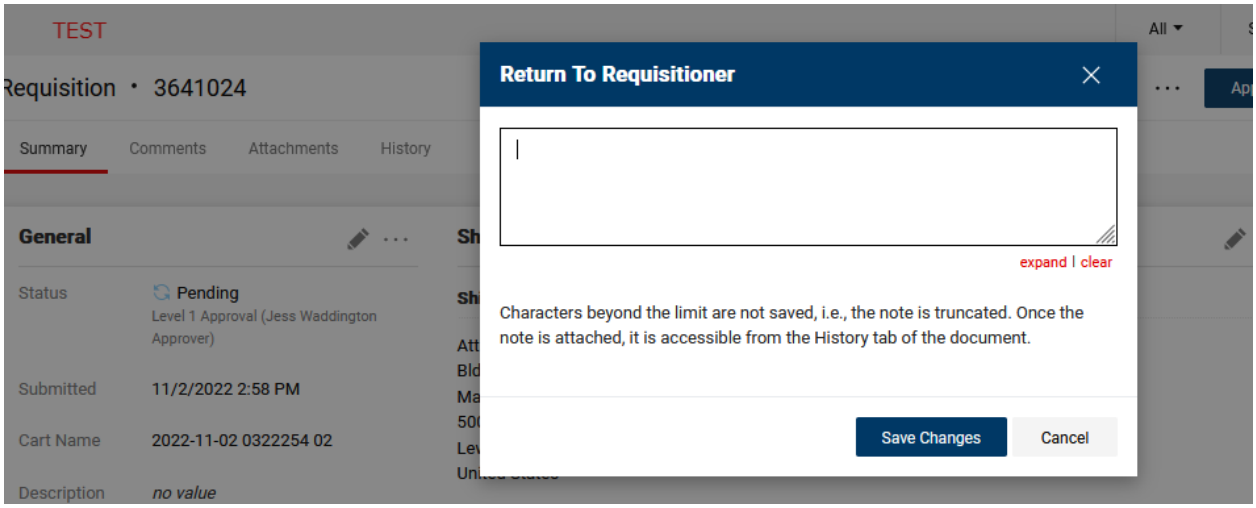


7. Click on the Requisition number to open the full requisition. This action allows an Approver to select **Approve** (approves the Req and returns to the Approvals queue) or **Approve & Next** (approves the Req and loads the next). **Assign to myself** can also be selected to edit or return the Req.

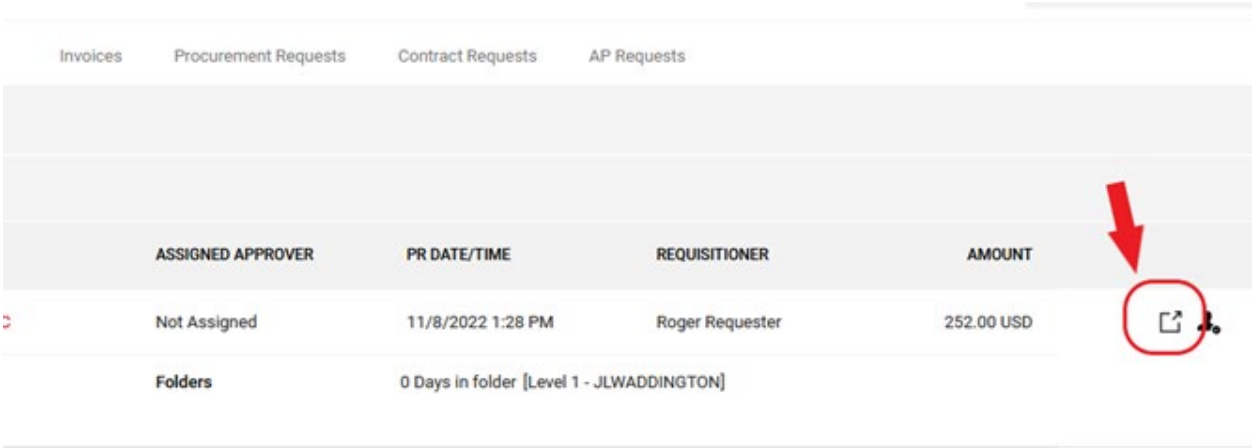


8. If **Assign to myself** is selected, the Approver can then choose **Return to Requisitioner**. This action allows the Approver to add comments for the Requester, and send the Req back to them.

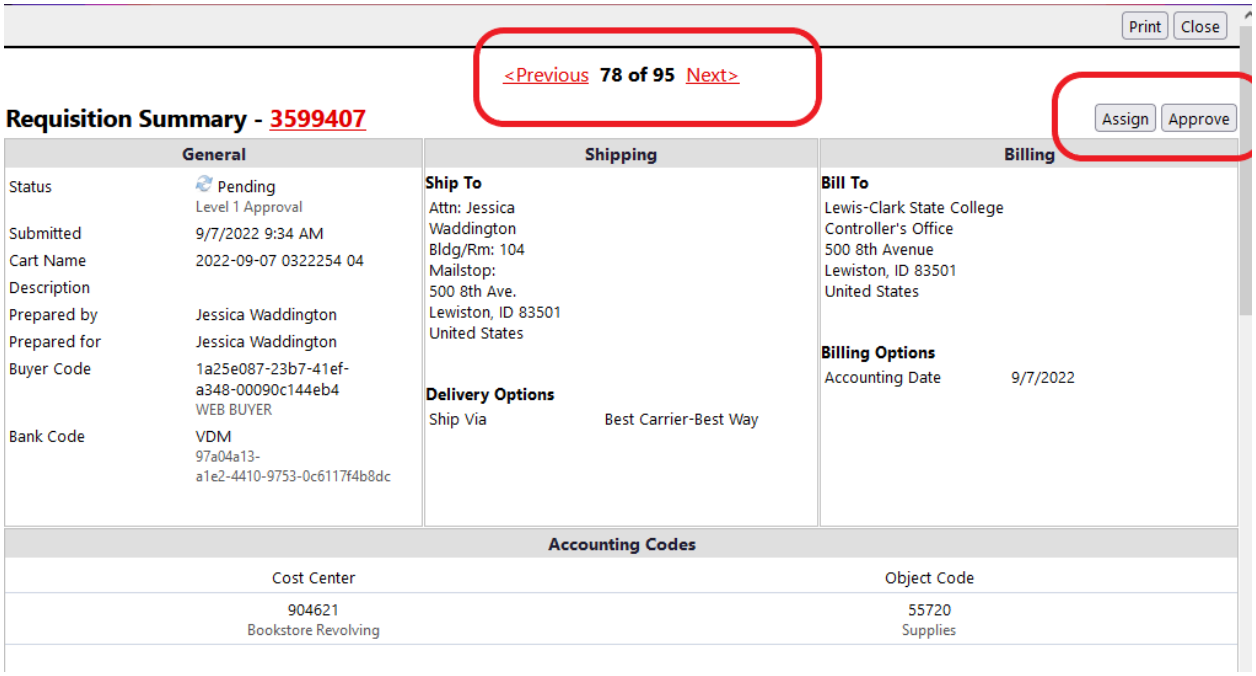




9. Alternatively, the Approver may click on the **Quick View icon** and open a summary of the Req.

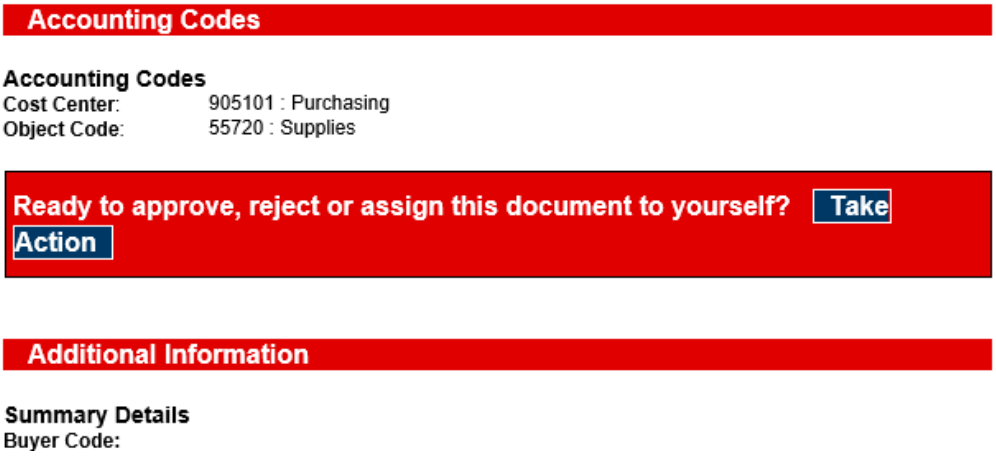


10. The Quick View launches a separate window with a summary of the Requisition details. In this window, an Approver can use the **Previous** and **Next** buttons to move through a quick view of all Requisitions pending approval. The Approve button will approve and close window.
    a. The Assign button can be selected to assign the requisition to the Approver, but it is recommended to follow the process in Step 7 & 8 above for ease of use.

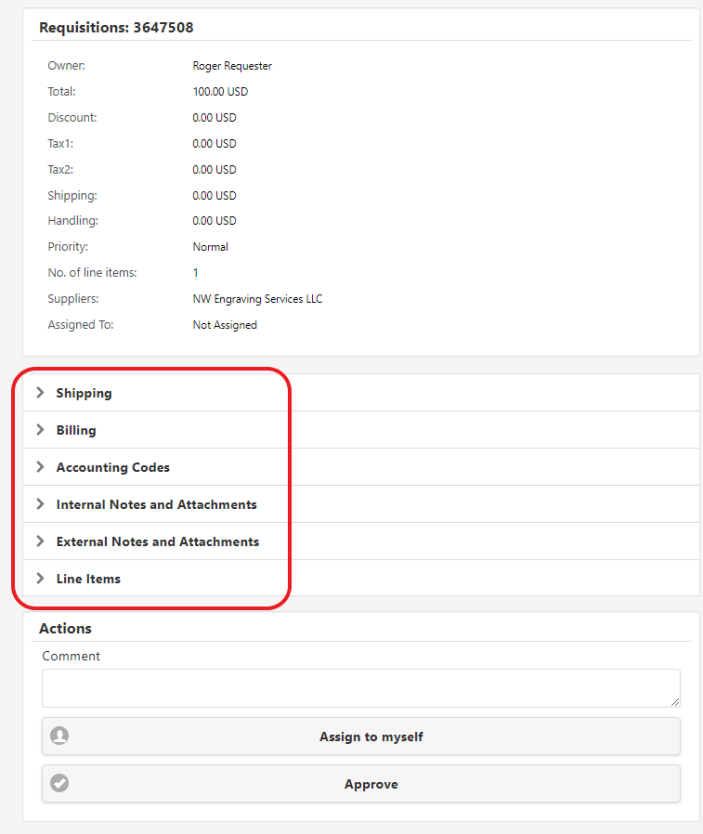
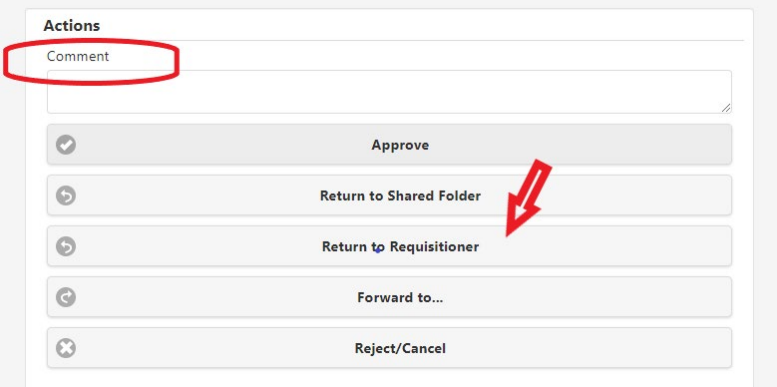


11. Approvers can also approve the Requisition via email. When a Requisition requires approval, an email is generated to the Approver.

12. Scroll down in the email and click on the Take Action button.



13. The Requisition Approval will open in a separate browser window, in a summary format. Each **section** can be clicked on to expand the information.



14. The Approver can select approve, or assign to myself**.** If **assign to myself** is selected, the available options will update. The Approver can now enter **comments** and select **Return to Requisitioner.**