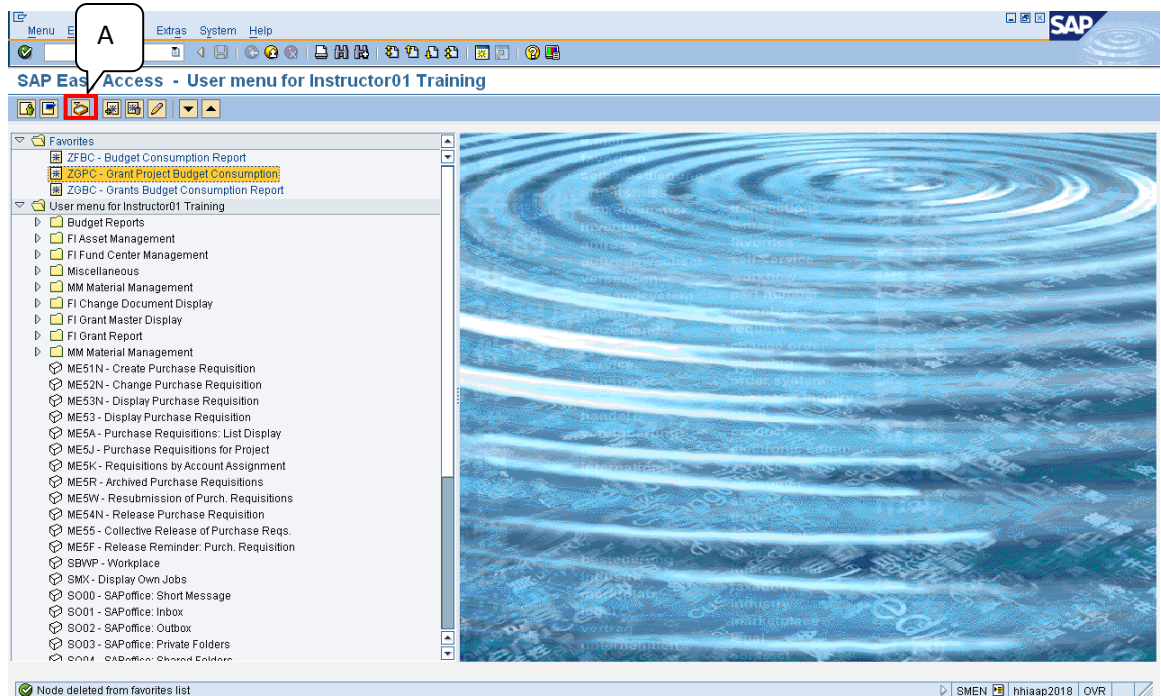


Business Workplace – Approve Requisition Line Item

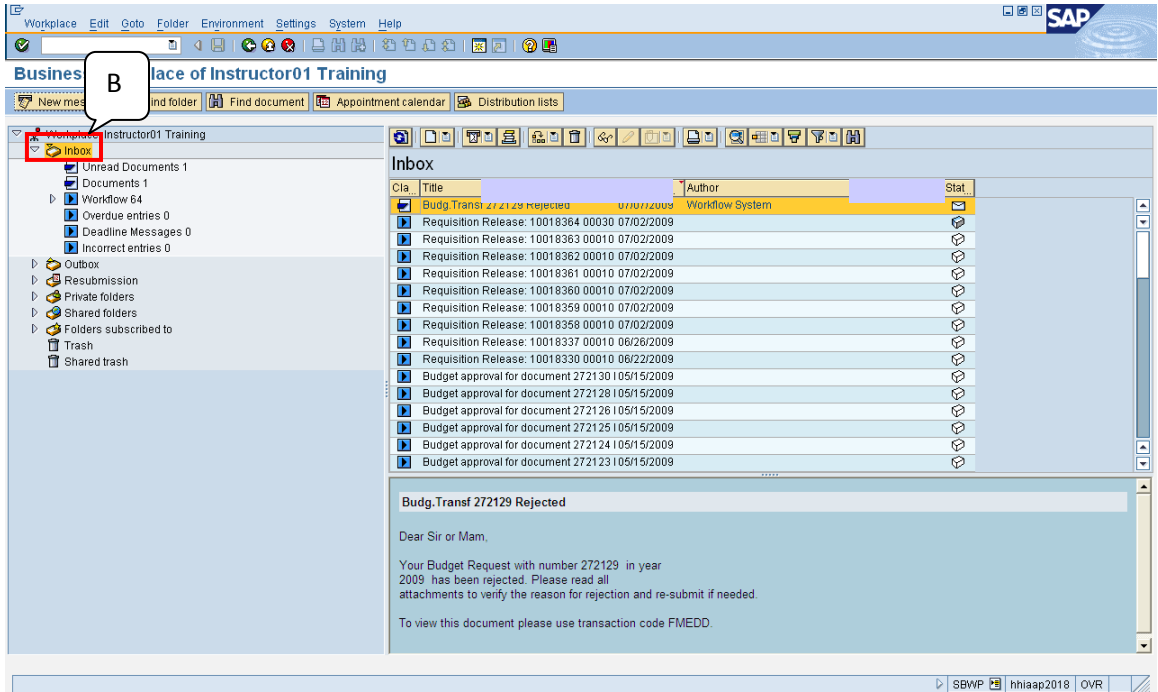
Requisition line items that are non-grant and over \$1000 require the approval of the person responsible for the cost center. All grant line items, regardless of the dollar amount, require the approval of the grant PI and Barb Smith in the Office of the Comptroller.

- Once logged into <https://myнку.nku.edu/iri/portal>, access Business Workplace within SAP GUI (A).

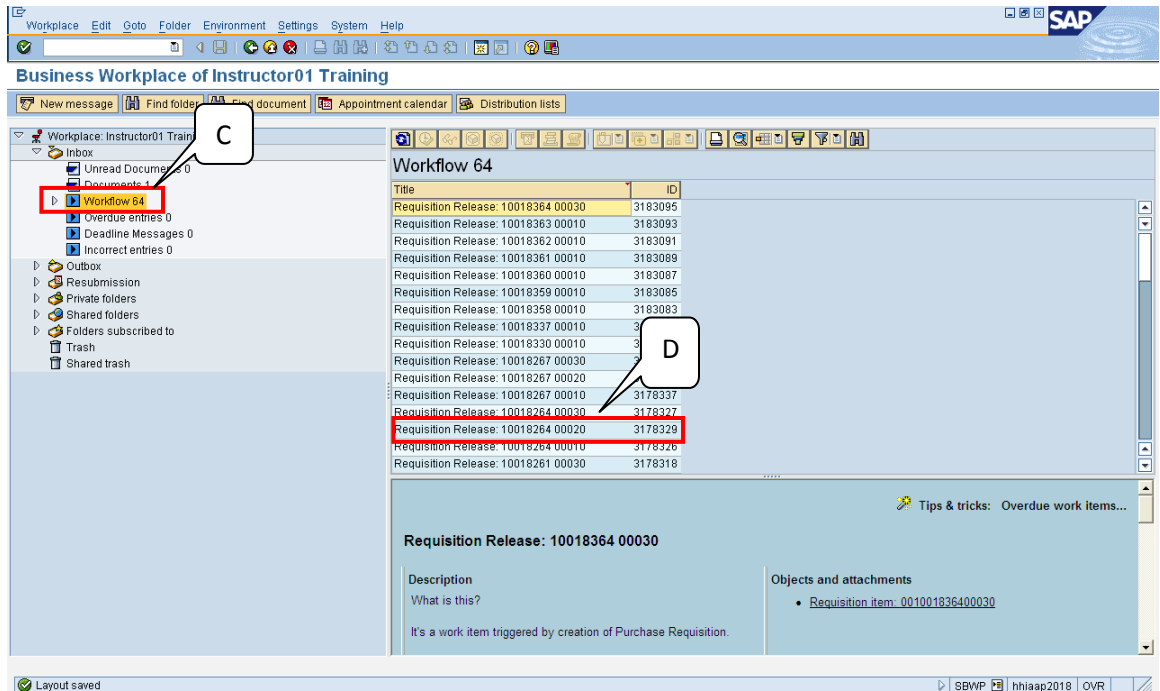


- Click Inbox (B).

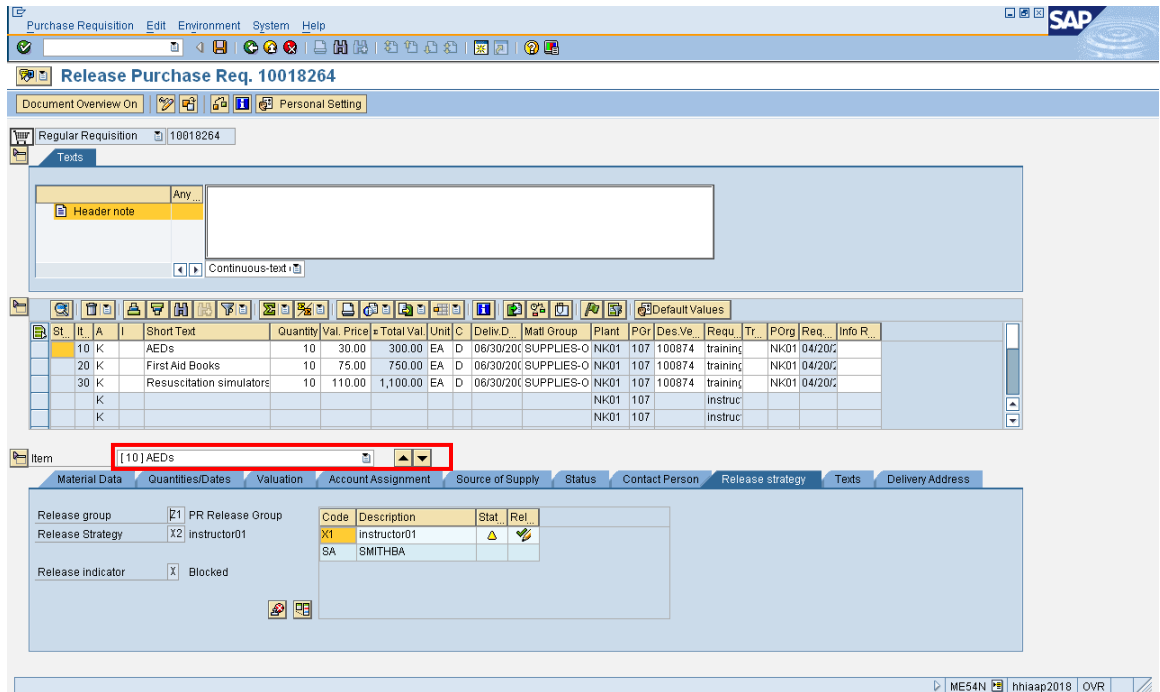
Note: The number appearing beside “Workflow” represents the number of items requiring your approval/rejection.



- Click Workflow (C).
- Double-click the appropriate requisition line item (D).



Note: The requisition will open to the Release Strategy tab for the appropriate line item.



- Click the Pencil with the Green Check Mark to approve (release) the requisition line item (E).
- Click the “Red X” (Reject) button to block the release of the requisition line item (F).

Note: Click the Texts tab and enter Release Notes with the reason for the rejection. See next screen shot.

The screenshot shows the SAP Purchase Requisition interface for document 10018264. The 'Texts' tab is active, showing a 'Header note' field. Below the text area is a table of requisition items:

St	It	A	I	Short Text	Quantity	Val	Price	Total Val	Unit	C	Deliv.D	Matt Group	Plant	PGR	Des.Ve	Requ.	Tr.	PORG	Req.	Info R...
10	K			AEDs	10	30.00		300.00	EA	D	06/30/200	SUPPLIES-O	NK01	107	100874	training		NK01	04/20/200	
20	K			First Aid Books	10	75.00		750.00	EA	D	06/30/200	SUPPLIES-O	NK01	107	100874	training		NK01	04/20/200	
30	K			Resuscitation simulators	10	110.00		1,100.00	EA	D	06/30/200	SUPPLIES-O	NK01	107	100874	training		NK01	04/20/200	
	K												NK01	107						
	K												NK01	107						

Below the table, the 'Item' details for '[10] AEDs' are shown. The 'Status' field is highlighted with a red box and a callout 'E', showing a pencil icon with a green checkmark. The 'Release indicator' is 'Blocked', highlighted with a red box and a callout 'F', with a red 'X' icon next to it.

- Release Notes example for a rejected line item.

This screenshot shows the same SAP interface as the previous one, but with the 'Texts' tab selected. The 'Item Texts' section is highlighted with a red box, showing a list of text types: Authority Number (P), Item note, Delivery text, Material PC text, and Release Notes. The 'Release Notes' type is selected, and the text area contains the note: "Not an allowable cost for this grant."

- **Release Refused:** example of Rejected Line Item.
- Click Save (G) to return to the list of workflow items.

Purchase Requisition Edit Environment System Help

Release Purchase Requisition 10018264

Document Overview On

Regular Requisition 10018264

Texts

Header note

Continuous-text

St	It	A	I	Short Text	Quantity	Val. Price	=Total Val	Unit	Deliv.D.	Matl Group	Plant	PGR	Des.Ve	Requ.	Tr.	POrg	Req...	Info R...
	10	K		AEDs	10	30.00	300.00	EA	D	06/30/20	SUPPLIES-O	NK01	107	100874	training	NK01	04/20/	
	20	K		First Aid Books	10	75.00	750.00	EA	D	06/30/20	SUPPLIES-O	NK01	107	100874	training	NK01	04/20/	
	30	K		Resuscitation simulators	10	110.00	1,100.00	EA	D	06/30/20	SUPPLIES-O	NK01	107	100874	training	NK01	04/20/	
		K									NK01	107		instruc				
		K									NK01	107		instruc				

Item [10] AEDs

Material Data Quantities/Dates Valuation Account Assignment Source of Supply Status Contact Person Release strategy Texts Delivery Address

Release group Z1 PR Release Group Code Description Stat.
 Release Strategy X2 instructor01 X1 instructor01
 SA SMITHBA

Release indicator X Blocked

Release refused

- **Release:** example of Approved Line Item.
- Click Save (H) to return to the list of workflow items.

Purchase Requisition Edit Environment System Help

Release Purchase Requisition 10018264

Document Overview On

Regular Requisition 10018264

Texts

Header note

Continuous-text

St	It	A	I	Short Text	Quantity	Val. Price	=Total Val	Unit	Deliv.D.	Matl Group	Plant	PGR	Des.Ve	Requ.	Tr.	POrg	Req...	Info R...
	10	K		AEDs	10	30.00	300.00	EA	D	06/30/20	SUPPLIES-O	NK01	107	100874	training	NK01	04/20/	
	20	K		First Aid Books	10	75.00	750.00	EA	D	06/30/20	SUPPLIES-O	NK01	107	100874	training	NK01	04/20/	
	30	K		Resuscitation simulators	10	110.00	1,100.00	EA	D	06/30/20	SUPPLIES-O	NK01	107	100874	training	NK01	04/20/	
		K									NK01	107		instruc				
		K									NK01	107		instruc				

Item [10] AEDs

Material Data Quantities/Dates Valuation Account Assignment Source of Supply Status Contact Person Release strategy Texts Delivery Address

Release group Z1 PR Release Group Code Description Stat. Rel.
 Release Strategy X2 instructor01 X1 instructor01
 SA SMITHBA

Release indicator X Blocked

Release effected with release code X1

Procurement services will create the purchase order once all approvals have been obtained. Any rejected line item will need to be deleted from the requisition so that the funds are available in the budget. Otherwise, the funds will continue to be encumbered for the funds center.

Refer to the Quick Reference Card for Deleting a Purchase Requisition at PRISM.nku.edu for step-by-step instructions for deleting a line item. FI users are encouraged to take the monthly FI trainings to fully understand the SAP system and FI business processes at NKU.