REQUISITION PROCESSING STATUS

This document explains the processing status of a requisition based on the release and workflow status of the requisition. The processing status of a requisition can either be one of four values that are listed below:

1. Release Status X Blocked - Requisition created and saved, but not released – Pages 2 – 4. Associated workflow information when requisition is status "X" is also presented.

2. Release Status Y Awaiting Approval - Requisition created, saved, released to an approval official but not yet approved – Pages 5 – 9. Associated workflow information when requisition is status "Y" is also presented.

3. Release Status 2 RFQ/Purchase Order – Requisition has been created, saved, released and approved Pages 10 – 11. Associated workflow information when requisition is status "2" is also presented.

4. Release Status Purchase Requisition not subject to release strategy - Requisition has been assigned to a buyer Page 12 – 14.

WORKFLOW OVERVIEW: It is very important to note that the processing status of the requisition changes systematically based on the approval processes of the workflow program used for requisition approval. The requisition status and the workflow process work together, hand-in-hand, in the processing status of a requisition. To accurately determine the status of a requisition it is very important that you have a working knowledge of how to read the release status and know how to interpret the associated requisition workflow overview. Additional information on how to interpret workflow overview information is also presented through the following examples:

EXAMPLE 1. Requisition with more than one workflow event; requisition rejected and resubmitted. Pages 15 – 17.

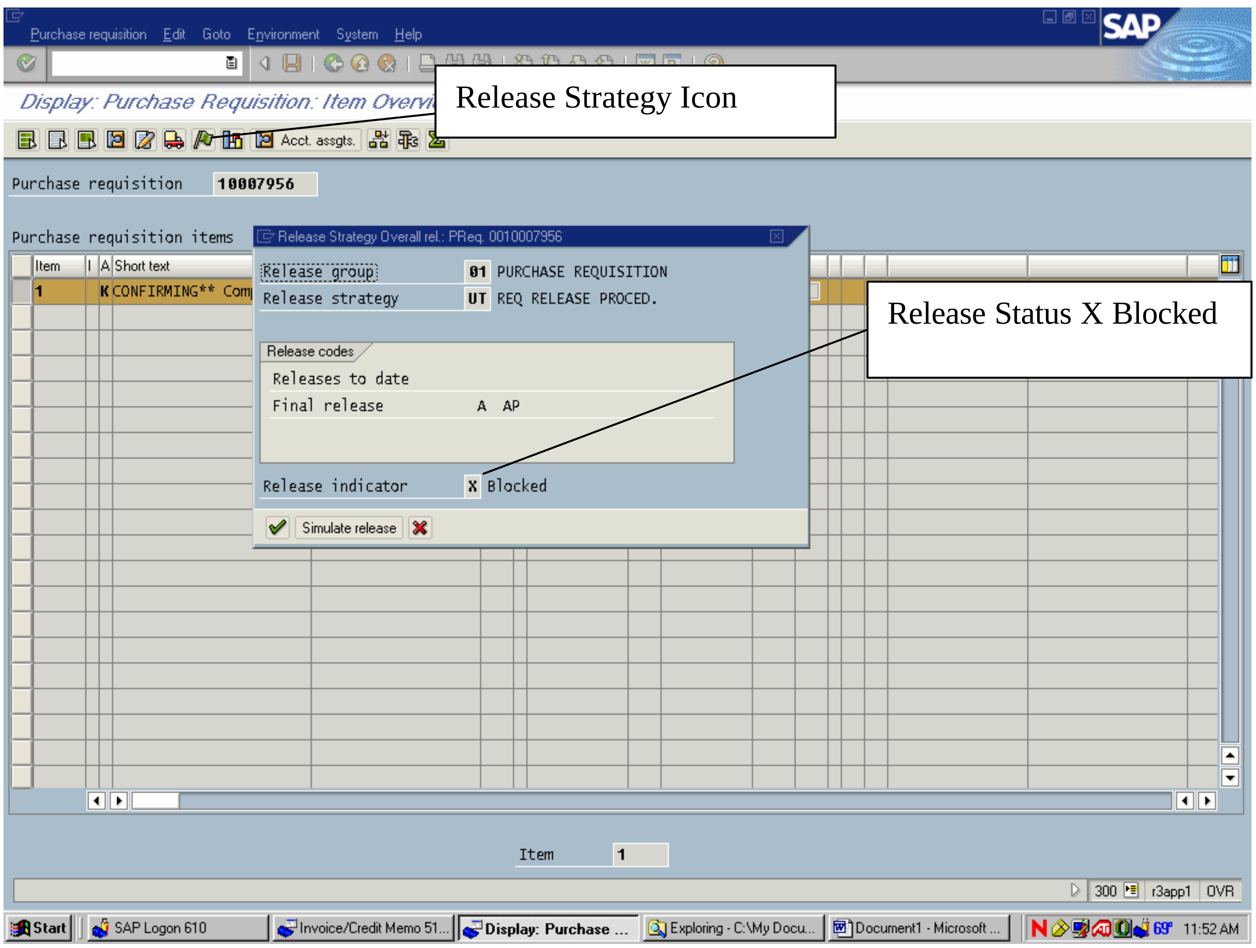
EXAMPLE 2. How to display and interpret the technical workflow logs Pages 18 – 20.

WORKFLOW APPROVERS: When the account assignment category of a requisition is either an A or a K, workflow notification is directed to approvers who are responsible/accountable for the funds listed in the account assignment of a requisition. When the account assignment category of a requisition is a U, workflow notification is directed to approvers who are responsible for the organization-funding source of the individual who created the requisition. To display the approver(s) that is associated with a fund source in IRIS, use the ZAPPS - Display Approver/Reviewer Responsibilities report transaction. The transaction is found in the SAP menu path under Tools>> Business Workflow>> Development>> Reporting>> ZAPPS - Display Approver/Reviewer Responsibilities. See Pages 21 - 22.

1. **Release Status X Blocked**- Requisition created and saved, but not released.

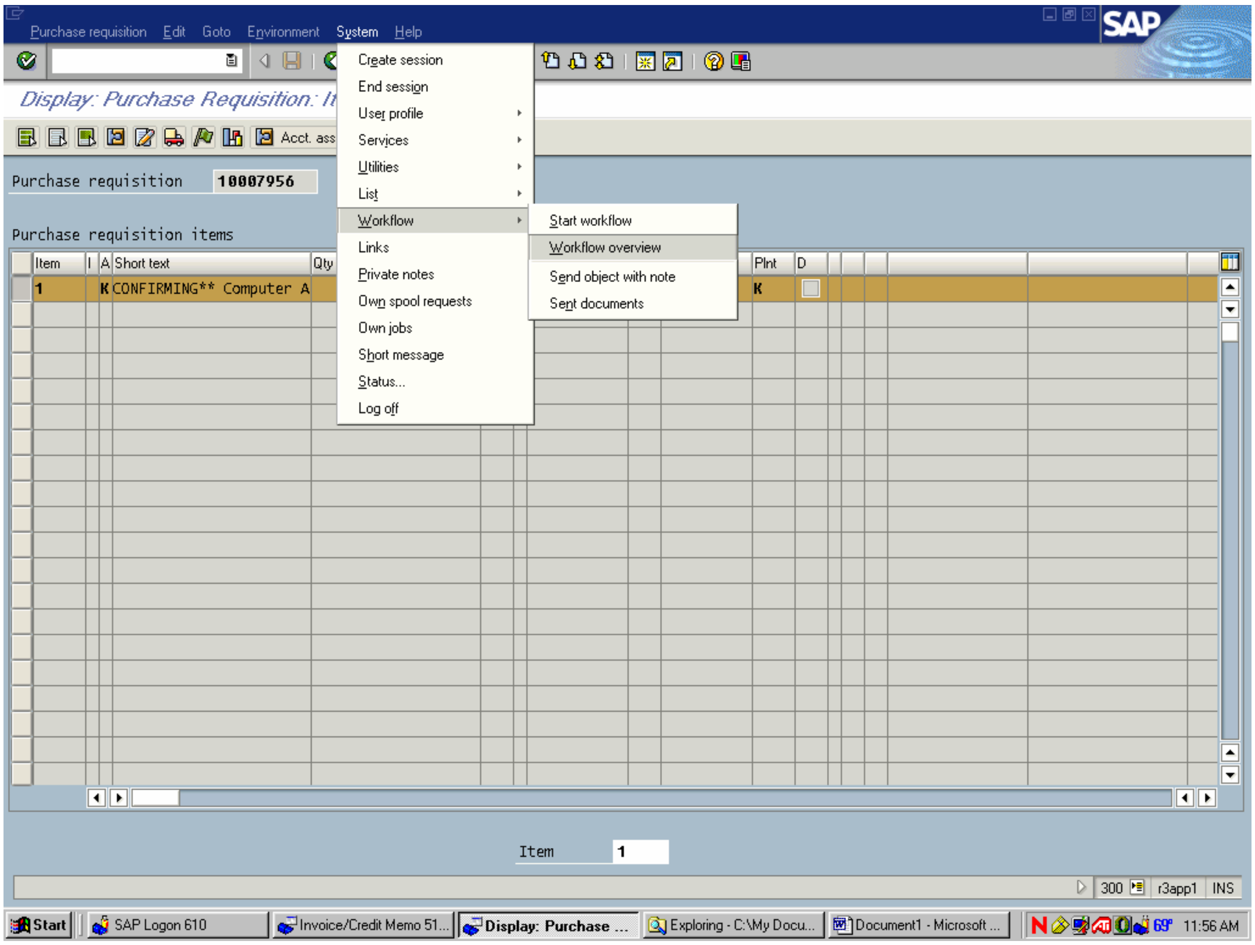
From the ME53 Display Requisition transaction, select the release strategy (green flag) icon. If the pop up box displays a status of X Blocked, in most cases this means the requisition has been created, saved, but not released. **IMPORTANT POINT: TO UNBLOCK A REQUISTION AND TO BEGIN A WORKFLOW, THE DEPARTMENT MUST RELEASE THE REQUISTION USING THE ME54 RELEASE REQUISTION TRANSATION.**

CAUTION: Be aware it is possible to have a release status of “X Blocked” even if the requisition has been released, approved and assigned to a buyer if the requisition has been returned to the department by the purchasing department. If the department desires to resend the requisition back to purchasing, the department must make the necessary changes to restart the workflow event for approval of the changes using the ME52 change requisition transaction. If the material group in line item 1 of the returned requisition is equal to "XX" change the material group to "99" along with any other changes that are necessary and save the changes. Proceed immediately to release the requisition again using the ME 54 release requisition transaction. If the material group in item 1 of the returned requisition is equal to "99" change the material group to "XX" along with any other necessary changes and save the changes. Immediately after saving, using the ME52 change requisition transaction, change the material group back to "99" and save the requisition again. Proceed immediately to release the requisition again using the ME 54 release requisition command. It is important that changes to the material group be made, as these actions are the catalyst used to start a new workflow event. ***In addition to reviewing the release status, the workflow overview should also be reviewed. See the next page for instructions on how to review the workflow overview.***



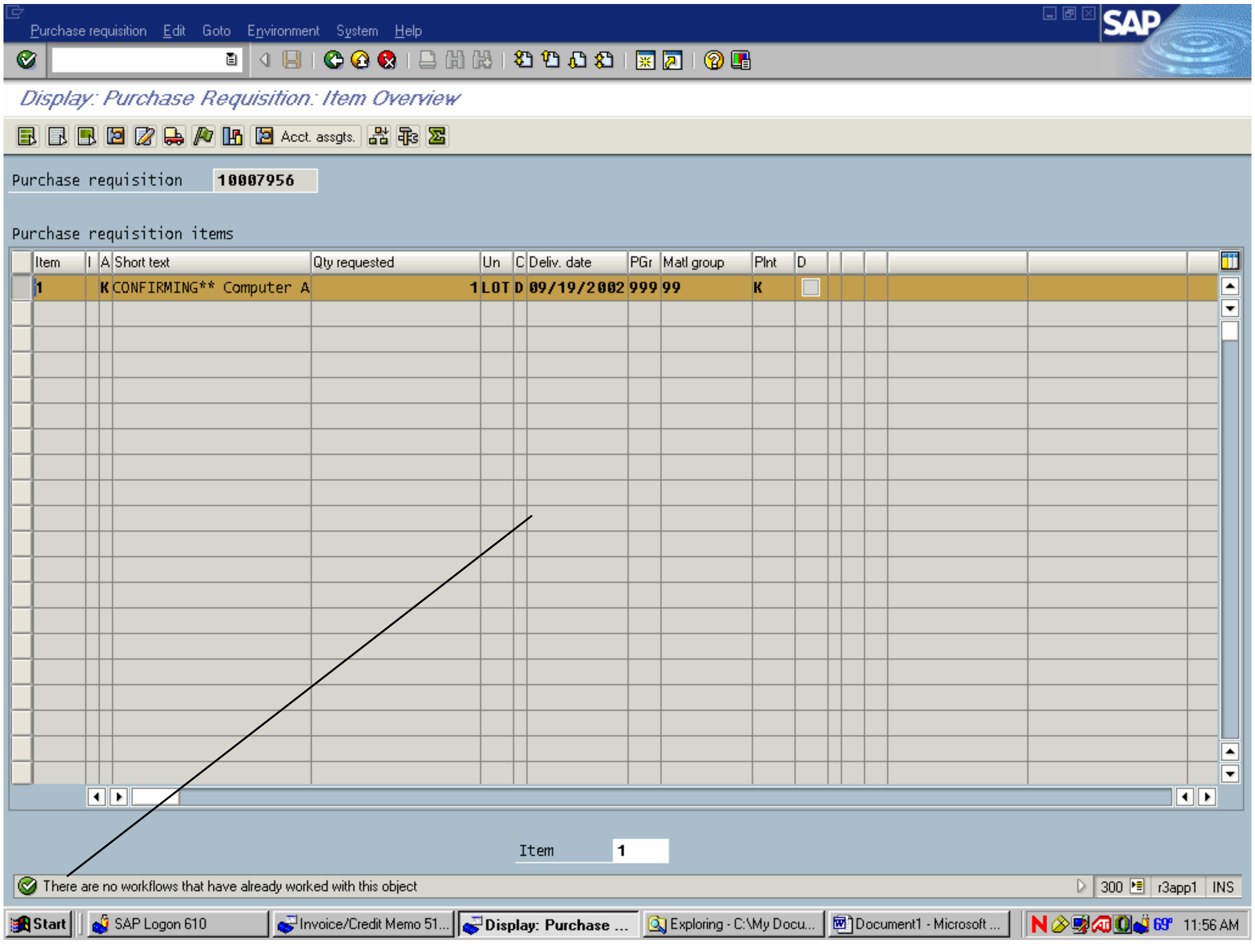
Workflow Overview for Status X - Blocked

To view the workflow overview of a requisition, use the transaction ME53 Display requisition, and select the System>>Workflow>>Workflow overview command as shown below. See the next page for display results.



If the requisition has a status of X Blocked, no workflow overview screen will be displayed and a message at the bottom of the requisition screen "There are no workflows that have already worked with this object" will be displayed.

If you have a requisition that has a release strategy of X Blocked and a workflow overview screen is displayed, this is an indicator that the purchasing department has returned the requisition. To reinitiate a workflow event, refer back to instruction in page two.

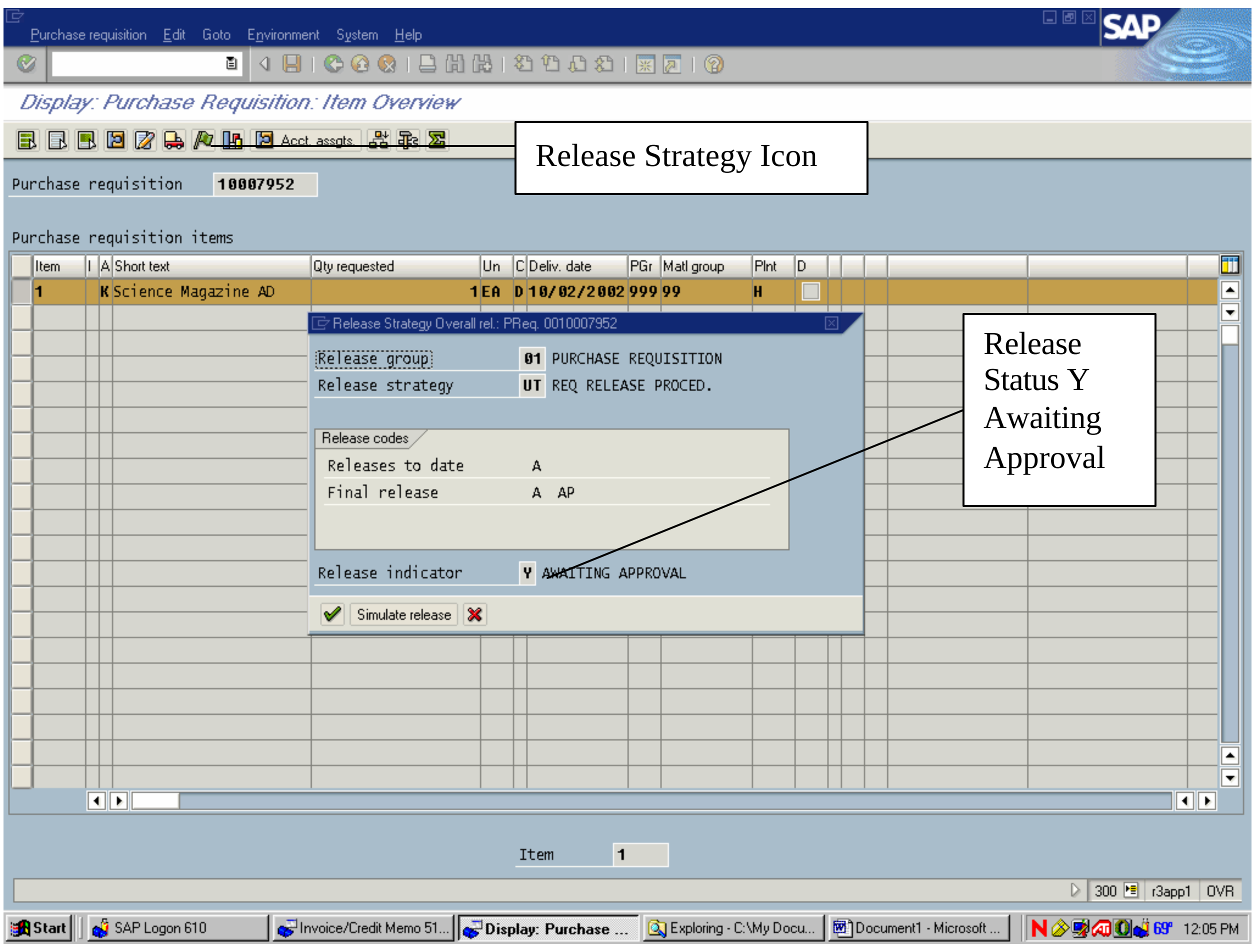


END OF INFORMATION FOR RELEASE STATUS X – BLOCKED. SEE NEXT PAGE FOR INFORMATION REGARDING RELEASE STATUS Y- AWAITING APPROVAL.

2. Release Status Y Awaiting Approval - Requisition created, saved, released to an approval official but not yet approved.

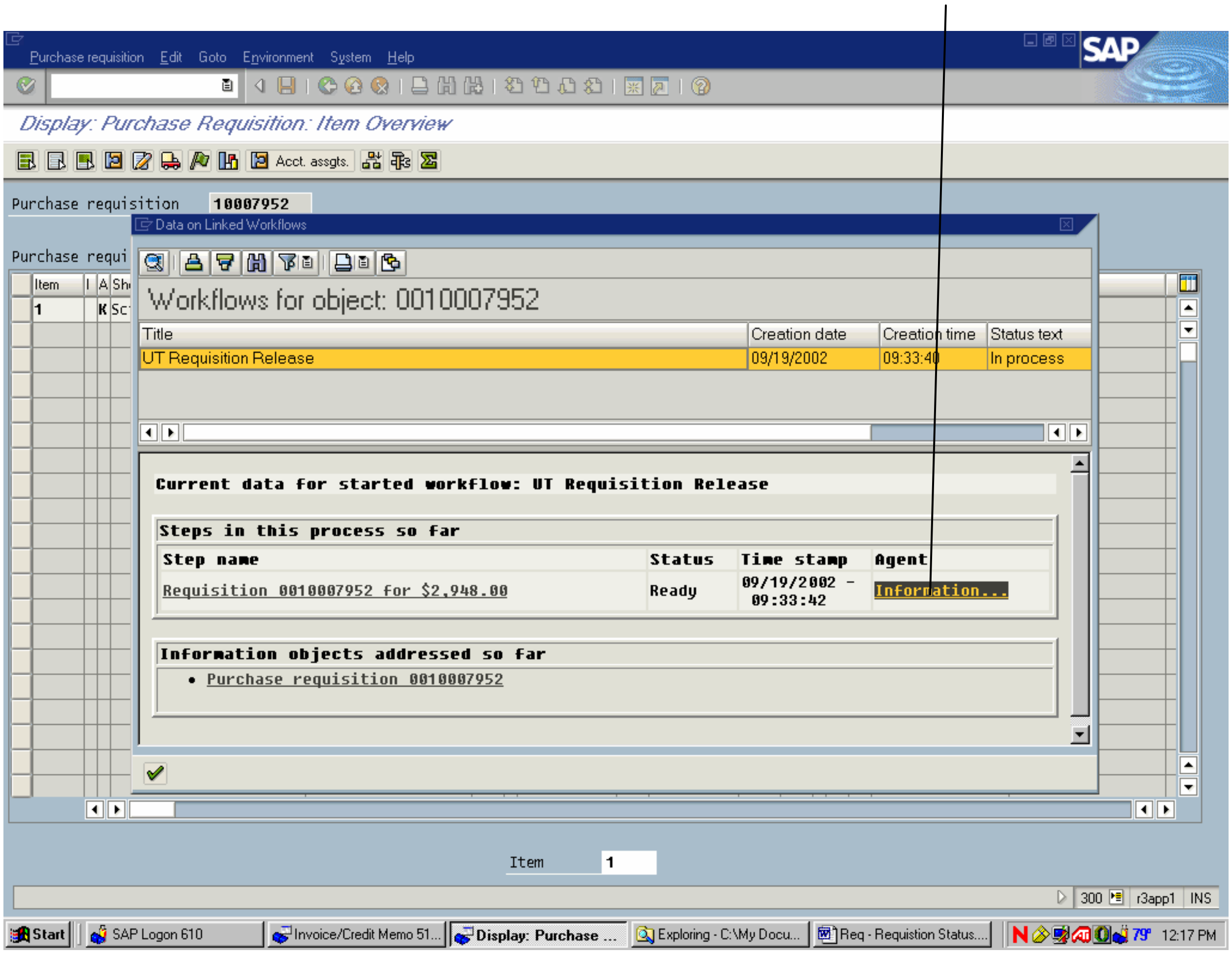
From the ME53 Display Requisition transaction, select the release strategy (green flag) icon. If the pop up box displays a status of Y Awaiting Approval this usually means the requisition has been created, saved, and released and is in the approver's workplace inbox for review.

Caution: If an approver rejects the requisition, notification of rejection is sent back to the individual who created the requisition, but the release status of the requisition will remain at "Y". The workflow overview must be reviewed to determine if the approver rejected the requisition. If a department desires to make corrective actions and resend the requisition back to the approver, the department will need to take the necessary steps to reinitiate the workflow using the ME52 change requisition transaction. Along with any changes made to the requisition, to restart the workflow the material group in line item 1 should be changed from 99 to XX and saved. Immediately after saving the requisition change, using the ME52 change requisition transaction, go back and change the requisition material group of line item one to 99 and save the requisition. After saving the requisition, release the requisition again using the ME54 release transaction. This action will start a new workflow event.



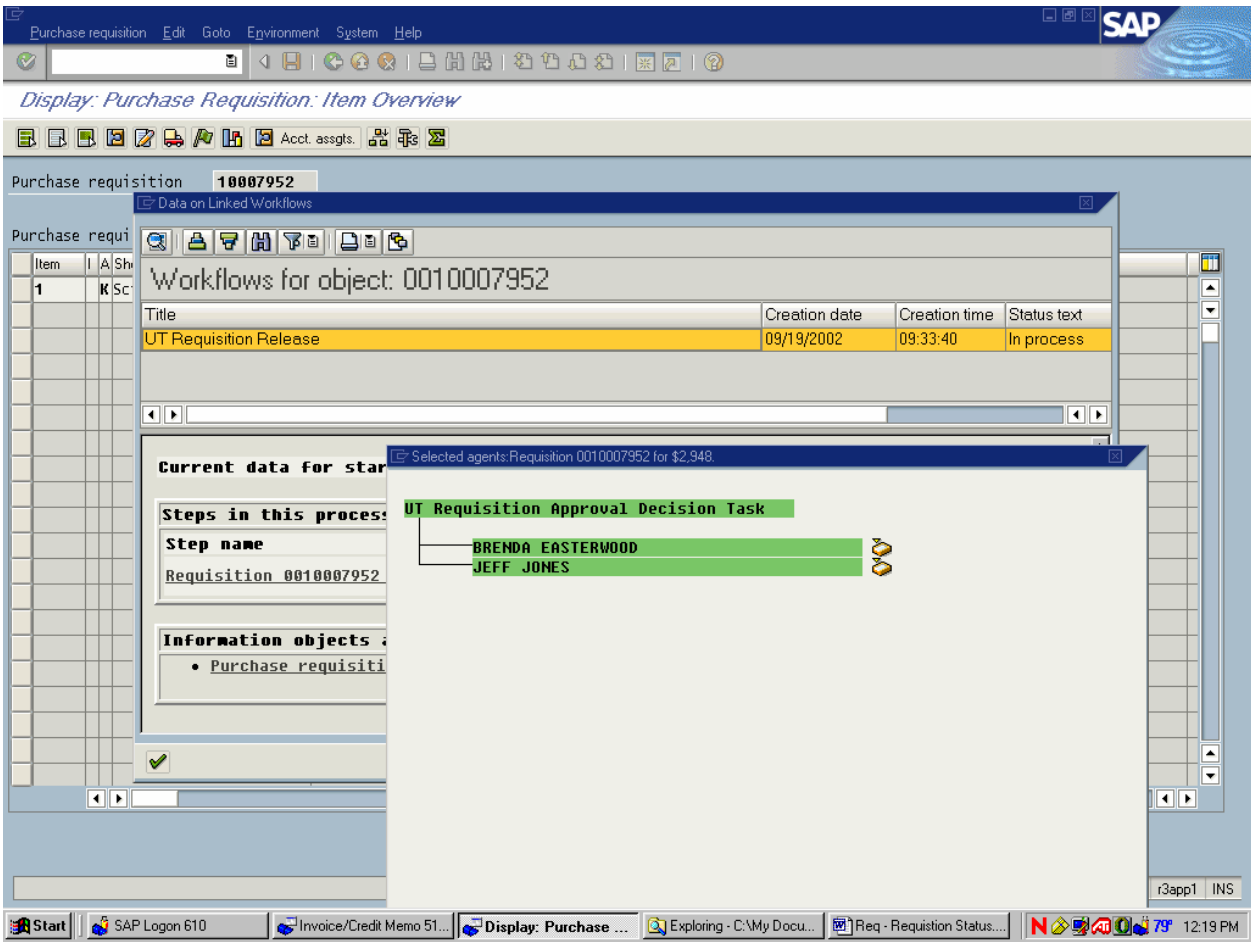
Workflow Overview for Status Y Awaiting Approval

The workflow overview is displayed with the ME53 Display requisition transaction using the System>>Workflow>>Workflow overview command. (If necessary review page 3 for additional information on displaying a workflow event) The example below shows a workflow overview when a requisition status is "Y". From the example below, one can determine that the requisition was released on 9/19/02 at 9:33 and a work item event was created occurred notifying the approver that a requisition is ready for review and approval or rejection.   To see who the approver (i.e. Agent) is for the requisition, select the Information field as shown below. See the next page for results.



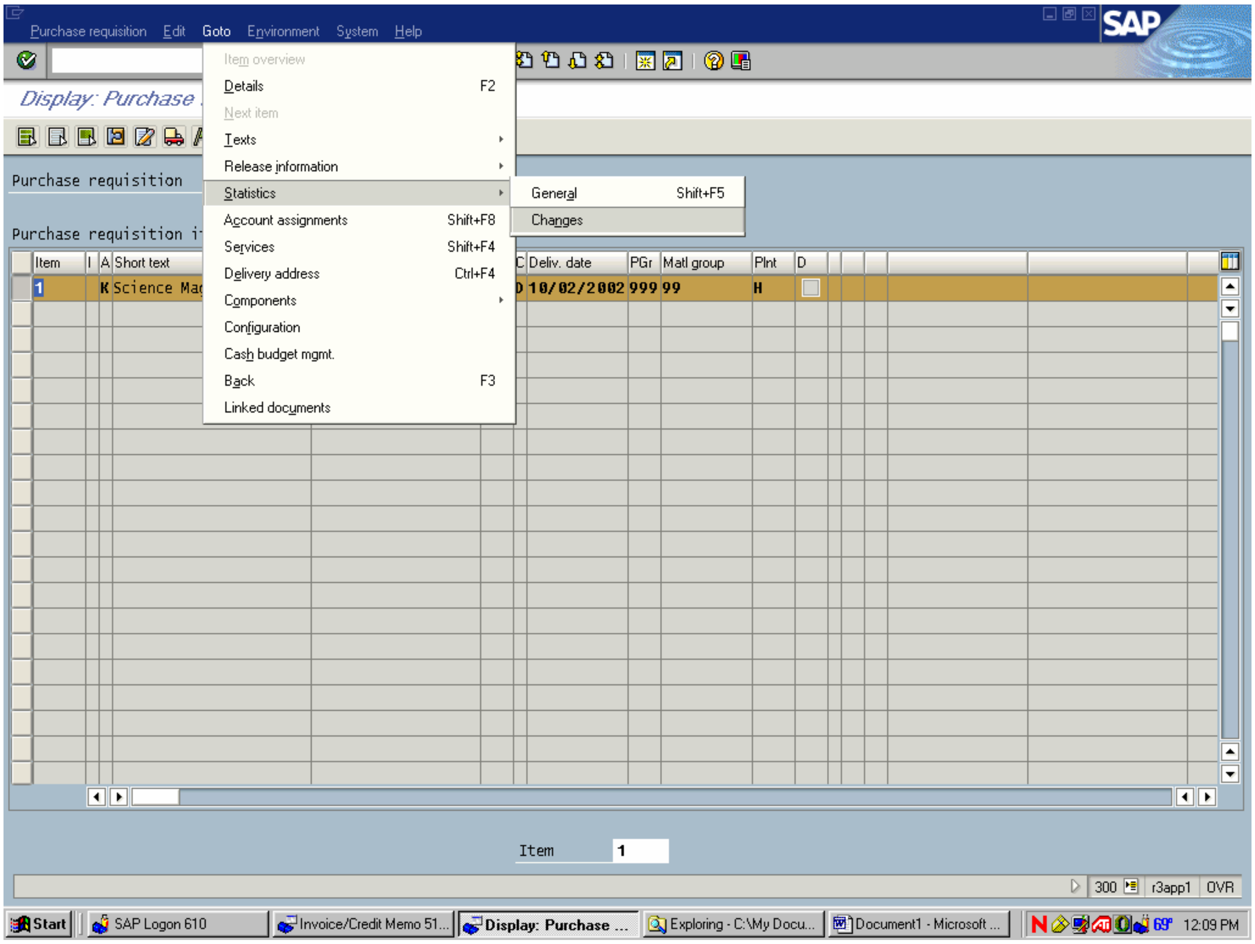
Information on Workflow Notification

A work item message has been sent to the workplace inbox of the individuals displayed below notifying them that the requisition is ready for review and approval or rejection. One of the individuals displayed will reserve and will either approve or will reject the requisition. For additional information on who approves funds used in conjunction with requisitions, see pages 20 – 22.



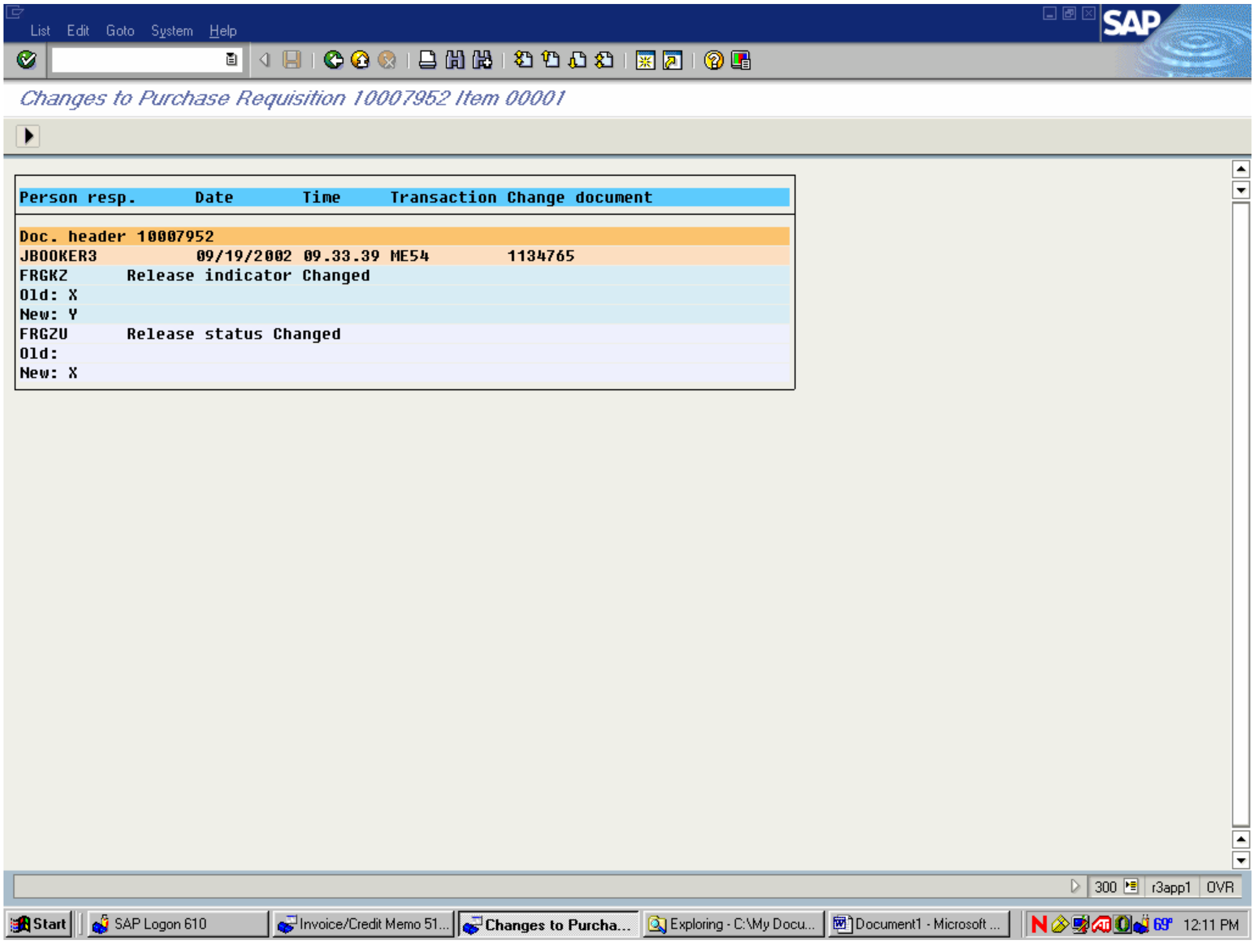
Additional Information: How to determine if a requisition has been released. You can determine if a requisition is released by using the Goto>>Statistics>>Changes Command while in the ME53 display requisition command. See the next page.

Requisition Release: Using the ME53 Display transaction, Select the Goto>>Statistics>>Changes Command to determine if the requisition has been released – See the next page for results of the command.



Requisition Changes Shown Below:

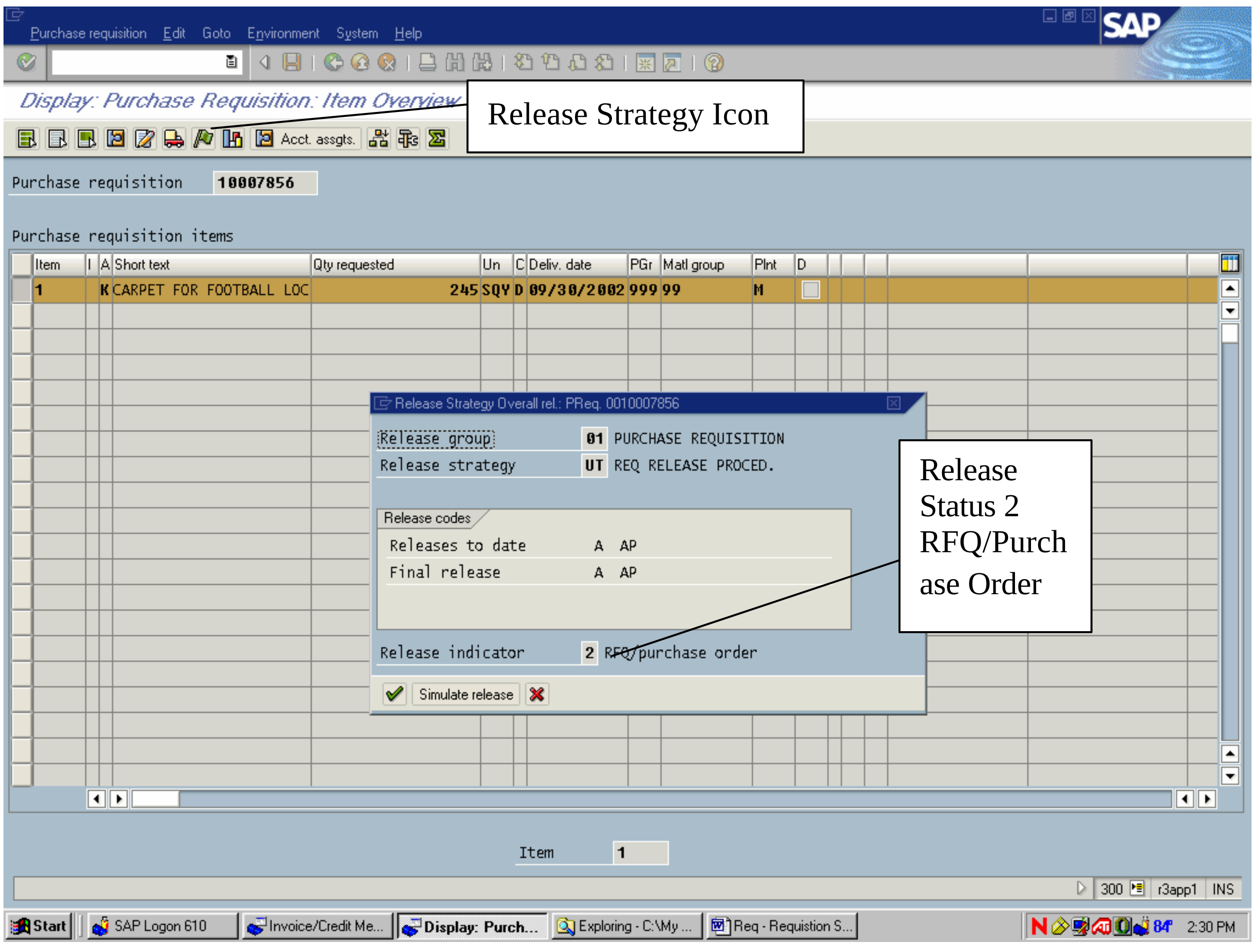
From the display below, one can determine that the requisition was released. On 9/19/02, an individual with a user ID of JBOOKER3 released the requisition using the ME54 transaction. The release status was changed from an X to a Y.



END OF INFORMATION FOR RELEASE STATUS Y – AWAITING APPROVAL. SEE NEXT PAGE FOR INFORMATION REGARDING RELEASE STATUS 2 RFQ/Purchase Order

3. Release Status 2 RFQ/Purchase Order – Requisition has been created, saved, released and approved.

From the ME53 Display Requisition transaction, select the release strategy (green flag) icon. If the pop up box displays a status of 2 RFQ/Purchase order this usually means the requisition has been created, saved, released, approved and is ready for assignment to a buyer. Only requisitions with a release status of "2" can be processed by the purchasing department. To view the associated workflow overview, select the System>>Workflow>>Workflow overview command. See next page for display of workflow overview.

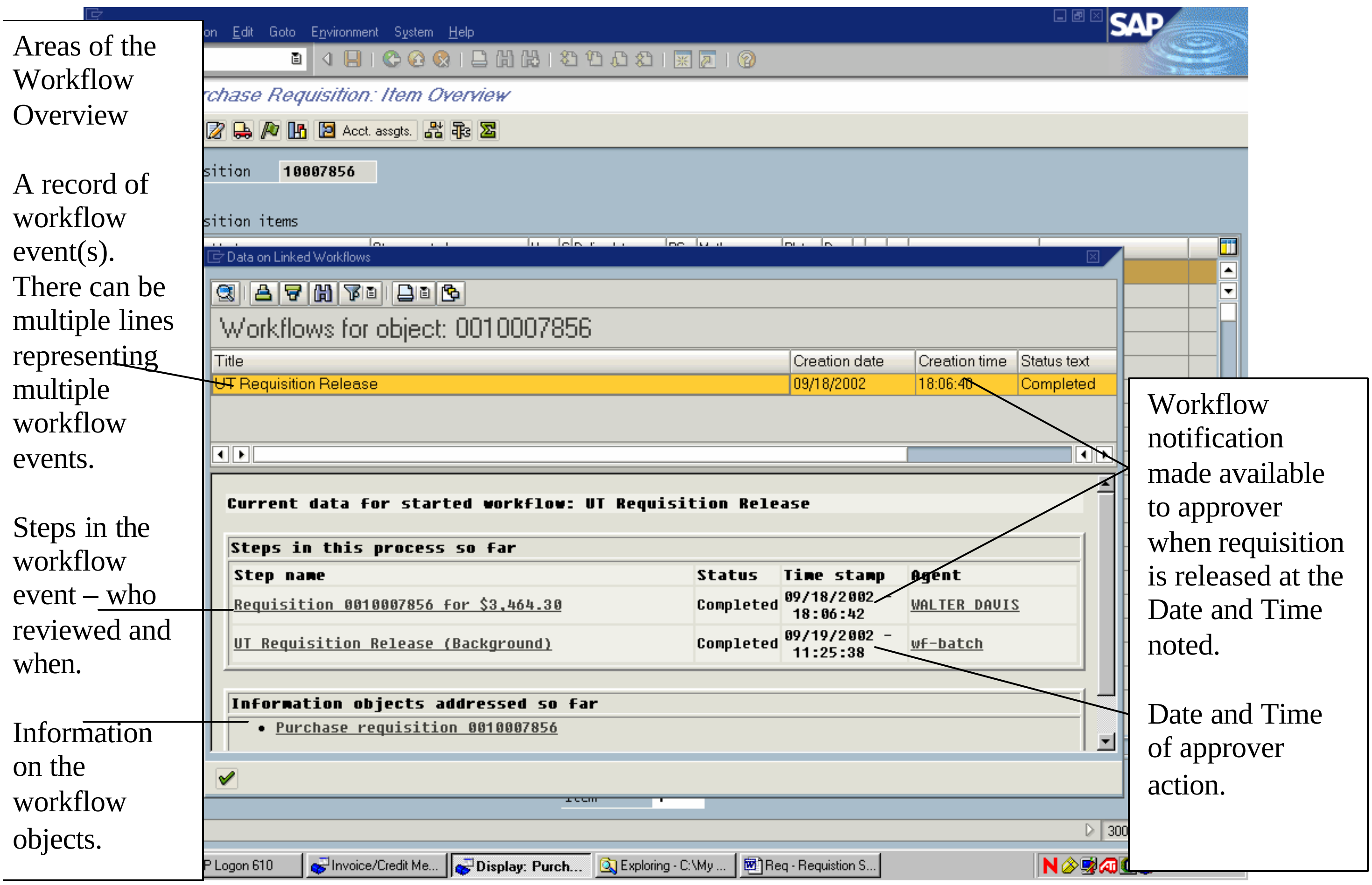


Workflow Overview for Status 2 RFQ/Purchase Order

The workflow overview is displayed with the ME53 Display requisition transaction using the System>>Workflow>>Workflow overview command. (If necessary review page 3 for additional information on displaying a workflow event) The example below shows a workflow overview when the requisition processing status is “2”.

The following pertinent information can be interpreted by reviewing the workflow overview displayed below:

A work item was created at 18:06 on 9/18/02. This is the date and time the workflow notification went to the approver’s inbox. In the example below Davis is the approver. The approver approved the requisition on 9/19/02 at 11:25 – the status of the requisition would than be changed to a “2”. The earliest that a requisition can be processed by the purchasing department is when the requisition status is changed to “2”.

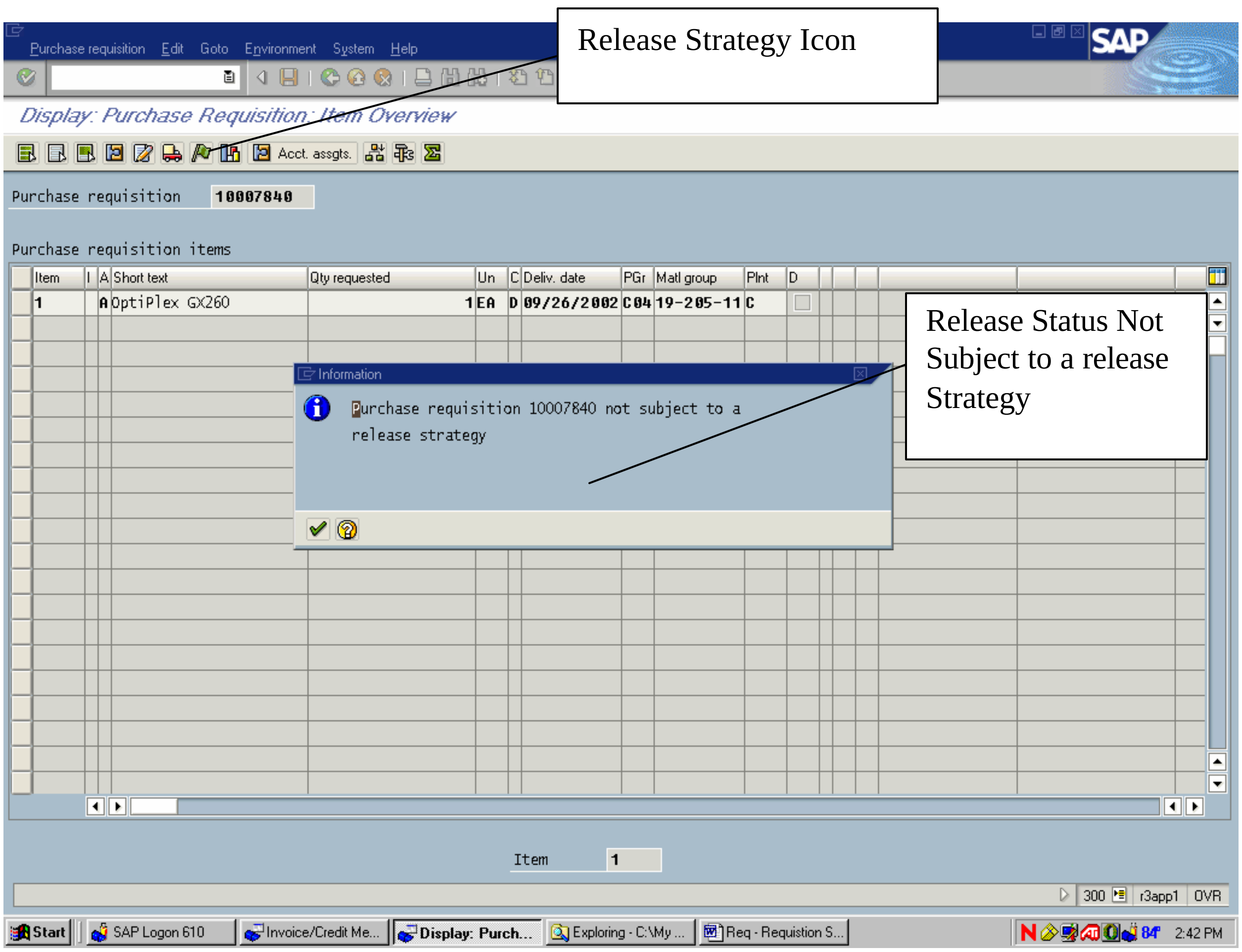


END OF INFORMATION FOR RELEASE STATUS 2 – RFQ/Purchase Order. SEE NEXT PAGE FOR INFORMATION REGARDING NO RELEASE STRATEGY STATUS.

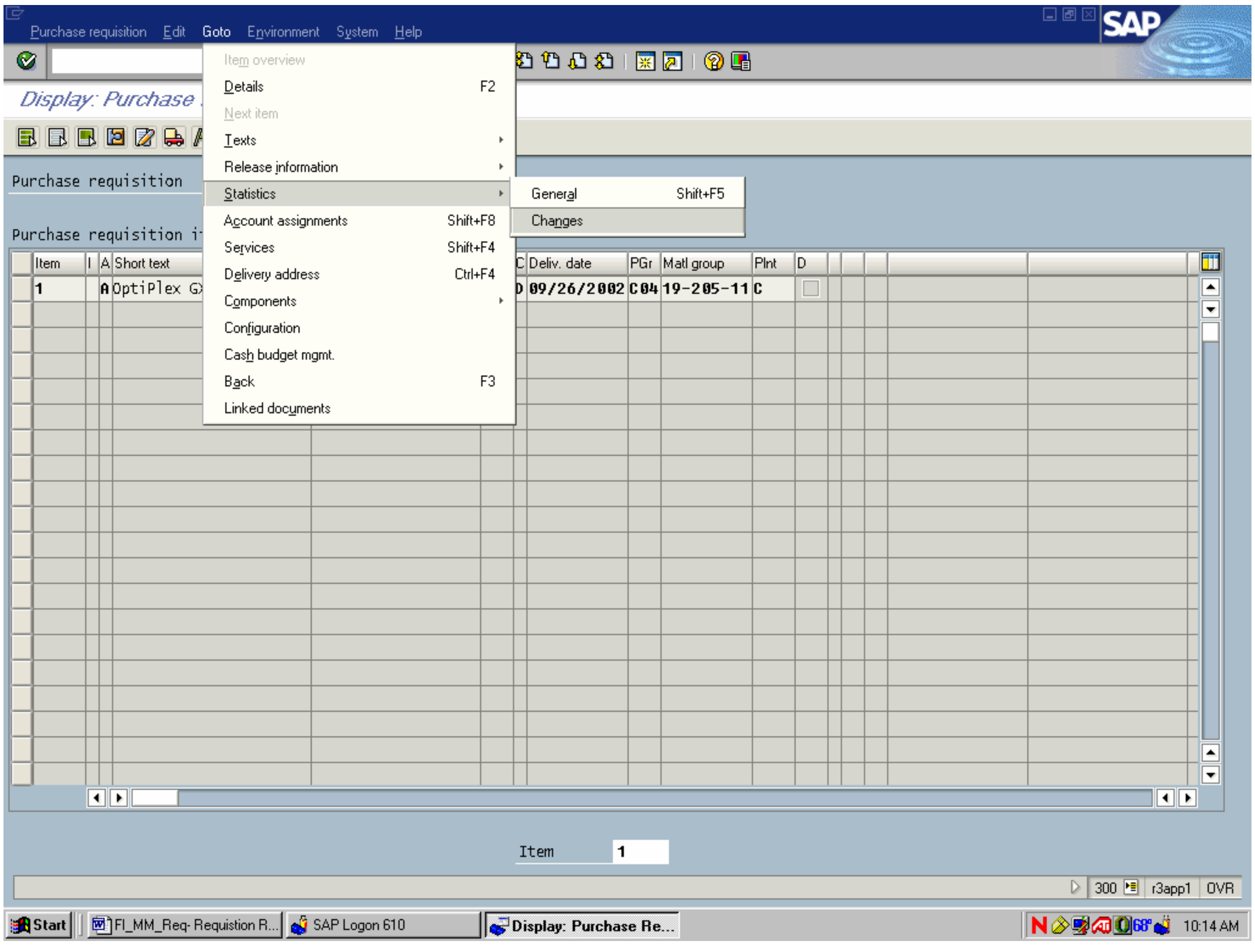
4. **Purchase Requisition not subject to release strategy**.

From the ME53 Display Requisition transaction, select the release strategy (green flag) icon. If the pop up box displays a status of Purchase Requisition not subject to release strategy this usually means that the requisition has been assigned to a buyer. The workflow log is available for review and can be reviewed with the ME53 Display Requisition transaction and using the System>>Workflow>>Workflow overview command. (If necessary review page 3 for additional information on displaying a workflow event) The workflow overview screen should look like the overview screen when the requisition processing status is equal to "2".

To determine when purchasing assigned a buyer to the requisition please see the next page.

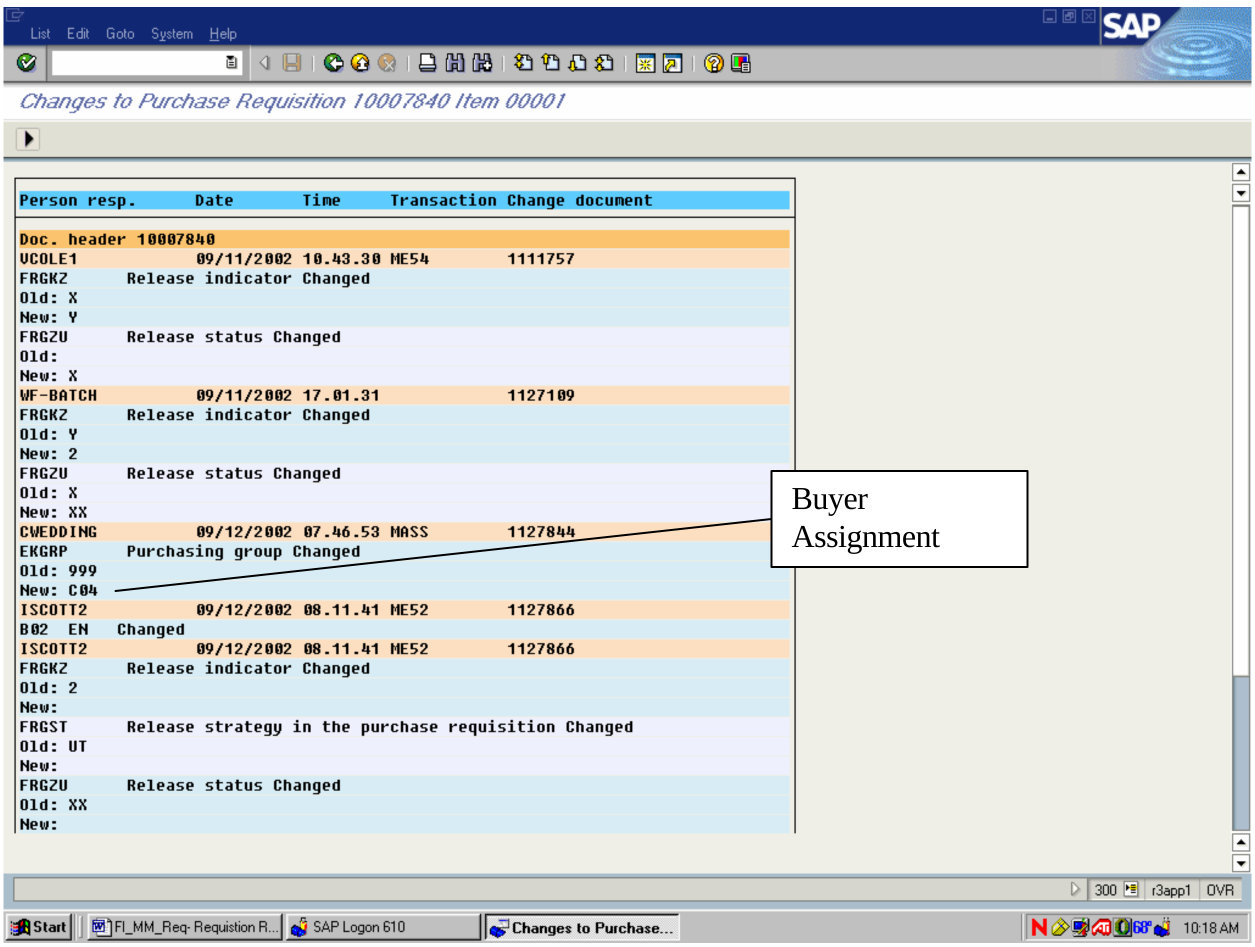


Using the ME53 Display requisition transaction select the Goto>>Statistics>>Changes command as shown below. Results of the command are displayed on the next page.



Requisition Changes – Buyer Assignment

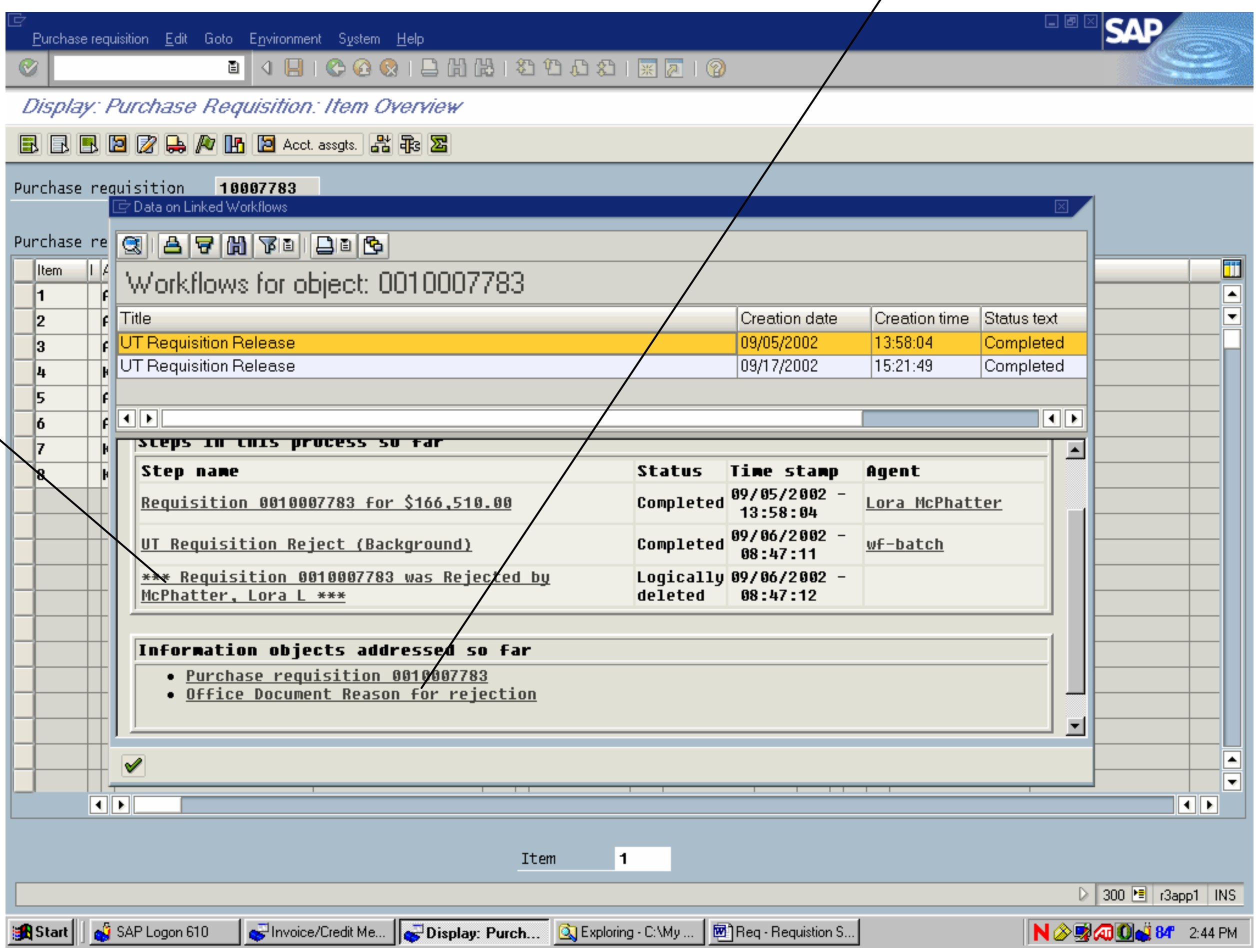
Find the change event that changes the purchasing group from 999 to a valid buyer code. From the display below, the requisition was assigned to a buyer on 9/12/02 at 7:46. Note the release status is changed from “2” to blank.



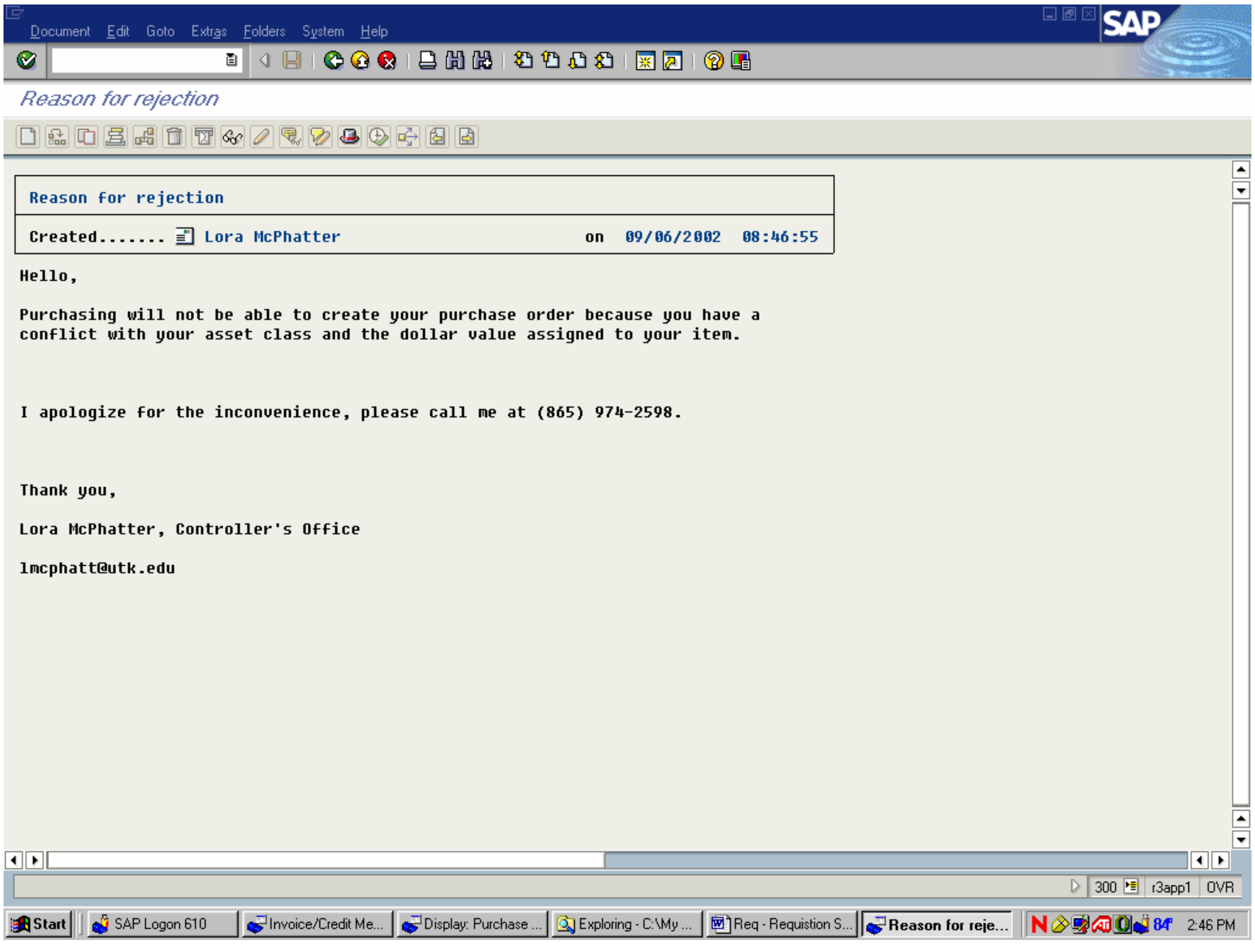
ADDITIONAL EXAMPLES OF WORKFLOW OVERVIEW EVENTS

An example of a requisition that has been rejected and resubmitted is shown below. Usually if there is more than one workflow event, it is a good indicator that the requisition has either been rejected by the approver or returned from purchasing and resubmitted for processing. Each workflow event stands on its own. In the example below, because the requisition was rejected and resubmitted, two workflow events appear.

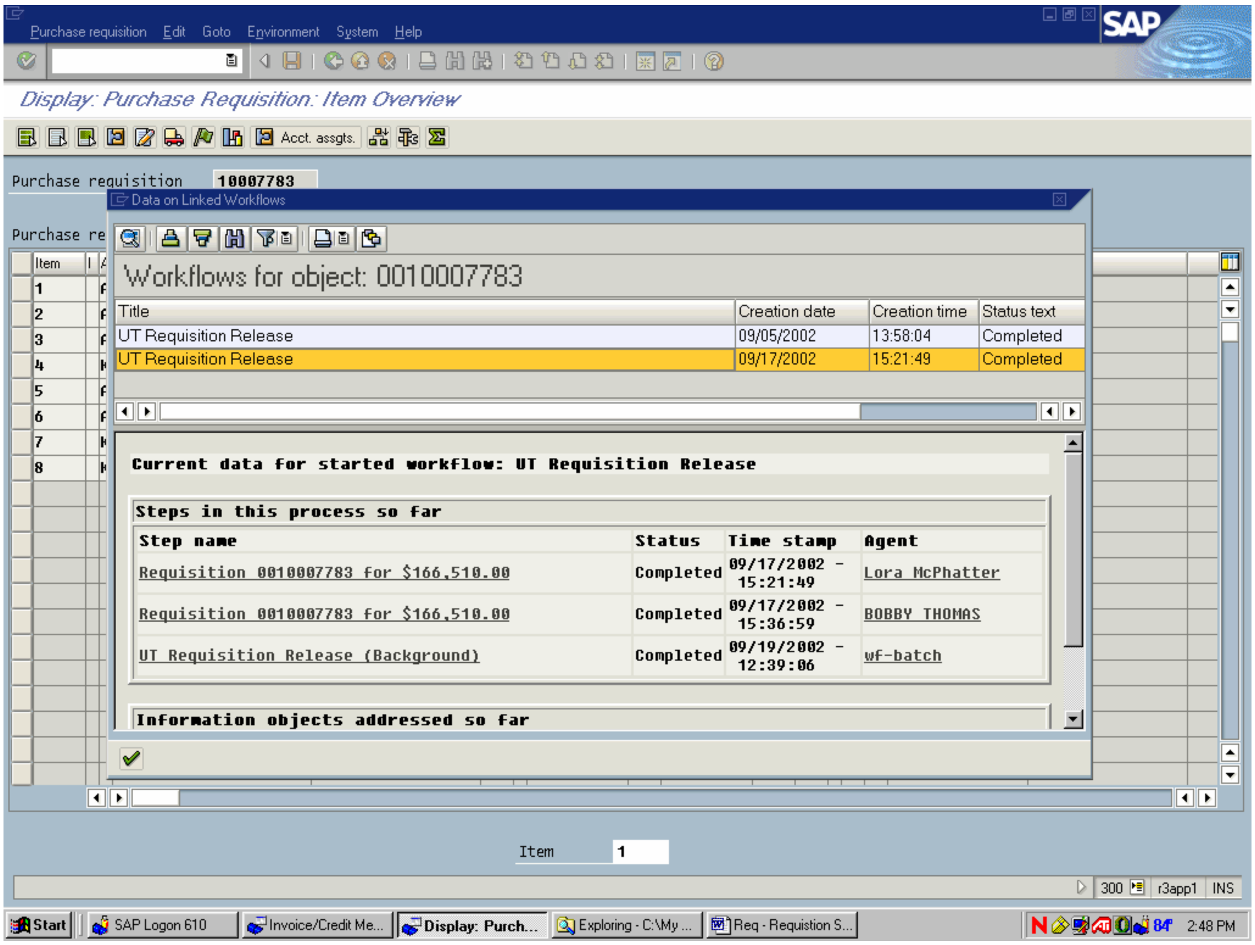
To display a particular workflow overview event, place your cursor on an event line and highlight the workflow event. The highlighted event with a creation date of 9/5/02 shows that the requisition has been rejected during review by asset management and returned to the department. There is also a message that explains why the requisition was rejected. Click on the Office Document Reason for rejection. See the next page for rejection notification document.



Reason for rejection is furnished. See the next page for display of the second workflow overview event for the requisition.

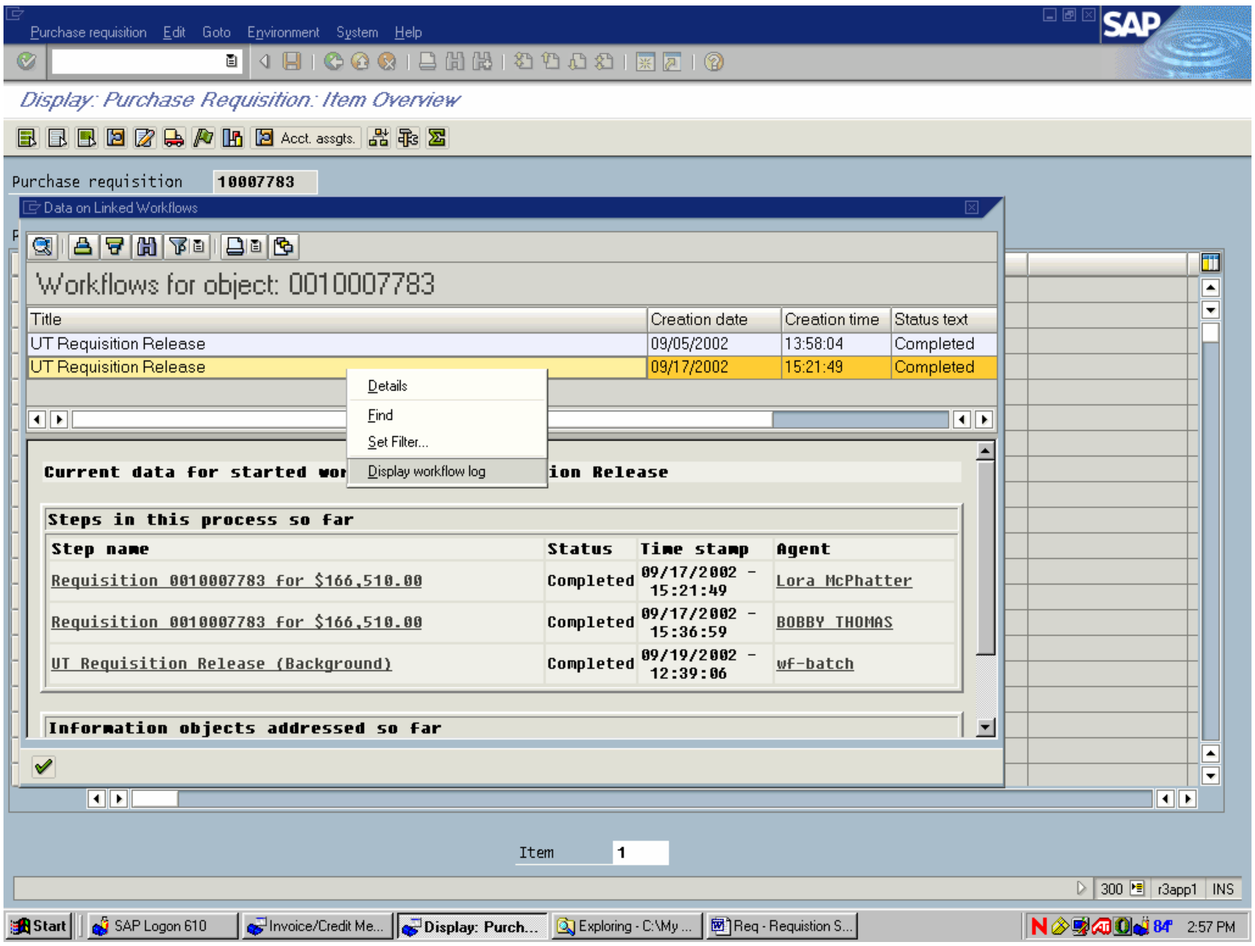


Note that the second event line is highlighted. This is the workflow overview event that shows the requisition resubmitted for approval. The workflow overview displayed below shows that the workflow event started on 9/17/02 at 15:21with notification to asset management. Asset management reviewed, approved and released notification to the final approver's workplace inbox at 9/17/02 at 15:36. The approver made final approval on 9/19/02 at 12:39. When approved, the requisition processing status is changed to "2".

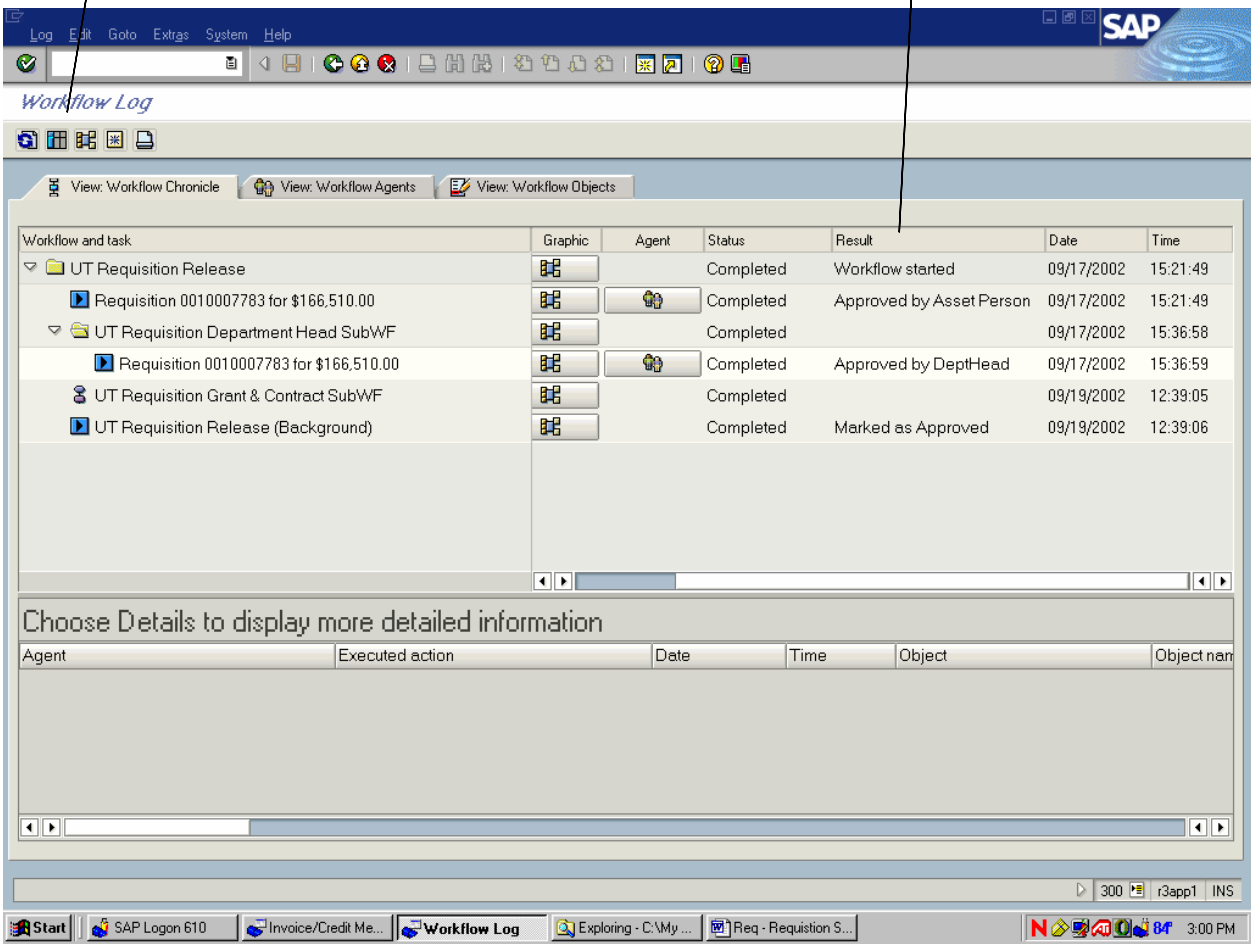


READING THE TECHNICAL LOG

It is possible to read the technical step-by-step processing log of a workflow overview if desired. To access the workflow overview log, highlight the event line item in the workflow overview then right click the mouse and select the display workflow log command. The screen as shown on the next page will be displayed when the display workflow command is executed.

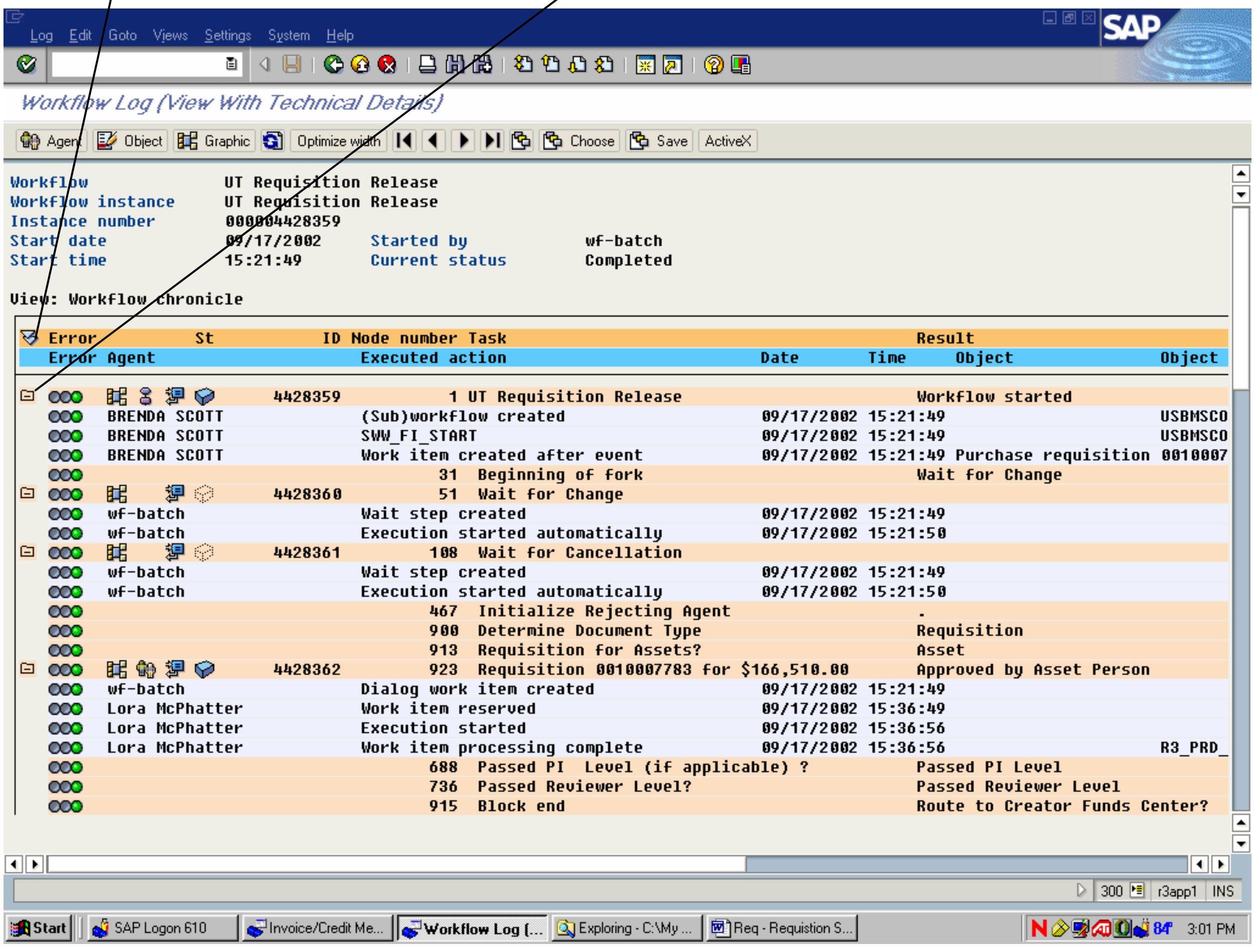


Select the technical details icon. The screen as shown on the next page will be displayed. From this screen you can also see the results of the workflow overview in the results column.



To view the workflow program step-by-step events, click opens the folders to the left.

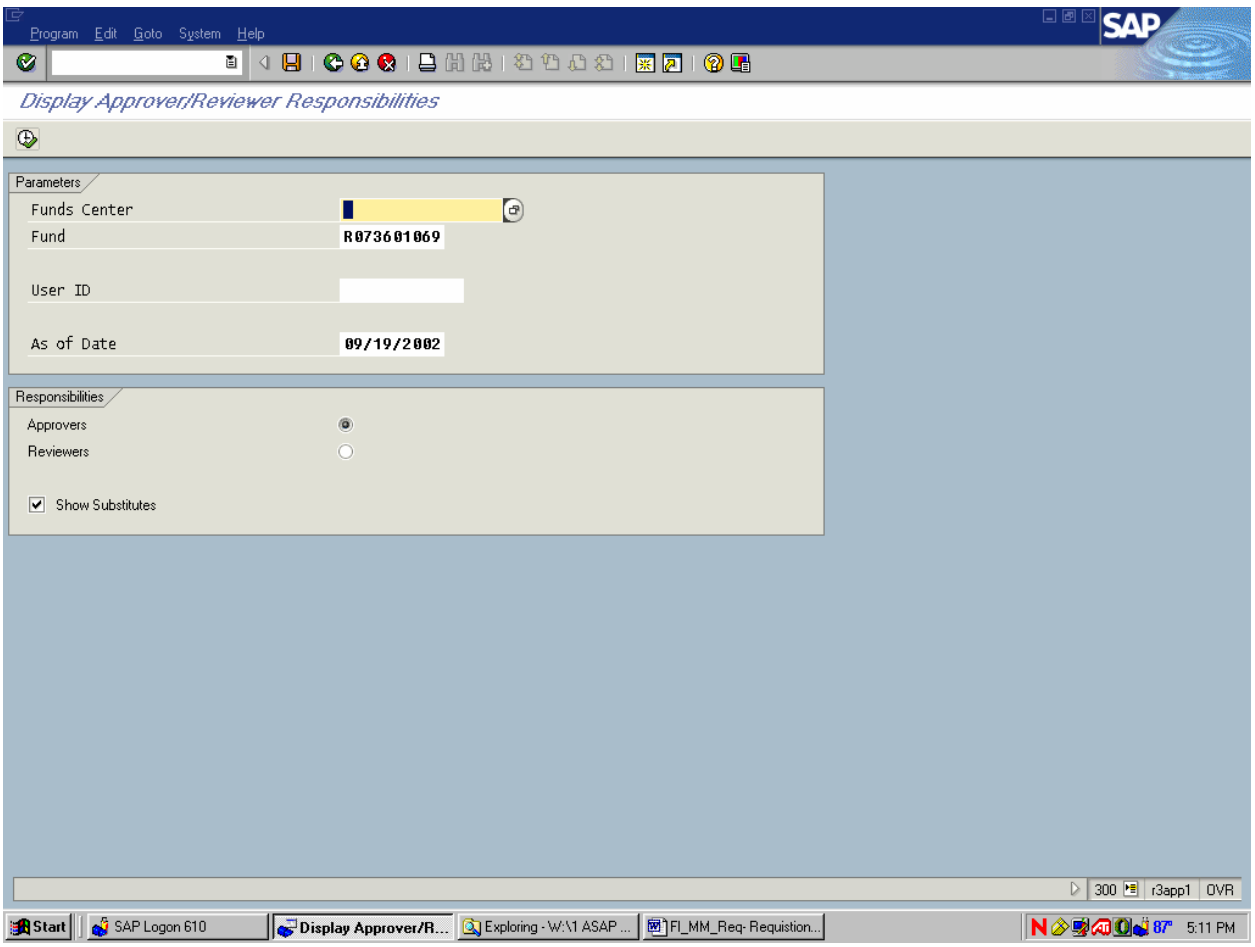
Click here to expand all folders.



HOW TO USE THE ZAPPS REPORT TO FIND APPROVERS IN IRIS

To display approver(s) associated with a fund source in IRIS, use the ZAPPS - Display Approver/Reviewer Responsibilities report transaction. The transaction is found in the SAP menu path under Tools>> Business Workflow>> Development>> Reporting>> ZAPPS - Display Approver/Reviewer Responsibilities. The screen as shown below will be displayed.

If the fund center is known, list information in the Funds Center field. If the fund center is not known, assign either a WBS element or Cost center to Fund field as shown below. If you want to also know the approver's substitutes, select the show substitutes box. Once all information is entered, select the execute button. Results of the report are displayed on the next page.



The approver(s) of any requisition line item that has an account assignment of R073601069 is displayed below.