

Forward a REQUISITION

If you need to send a Requisition to another Approver, you can forward it to them.

1. **Open the Requisition**, click on the Requisition link, and from the drop-down menu A new set of options will now be available; select **Forward to**.

The screenshot shows the 'Requisition 3002769' interface. A dropdown menu is open, displaying various actions: 'Approve & Next', 'Approve', 'Return to Shared Folder', 'Place on Hold', 'Return to Requisitioner', 'Forward to ...', 'Copy to New Cart', 'Add Comment', 'Add Notes to History', and 'Reject Requisition'. A red arrow points to the 'Forward to ...' option. The background shows the 'General' tab with fields like Status, Submitted, Cart Name, Description, Prepared by, Ad-Hoc Approver, Blanket/Service Order, and Purchasing BU. The 'Billing' section shows 'Bill To' information for McMaster University and 'Billing Options' with an Accounting Date of 7/10/2020.

2. A user search window will appear. Search for the user using the name, username, or email address. Enter a note and press the **Forward** button.

The screenshot shows a 'User Search' modal window. It contains input fields for 'Last Name' (WETTON), 'First Name' (Teresa), 'User Name', and 'Email'. There is a 'Role' dropdown menu and a 'Results Per Page' dropdown menu set to 10. At the bottom, there are 'Search' and 'Close' buttons.

Forward To ...

Forward To - Wetton, Teresa Carmel

as discussed, please review |

972 characters remaining

expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Forward

Cancel

Billing Options

The user will receive an email and in-system notification to approve this Requisition.