

How to filter Jaggaer Requisitions

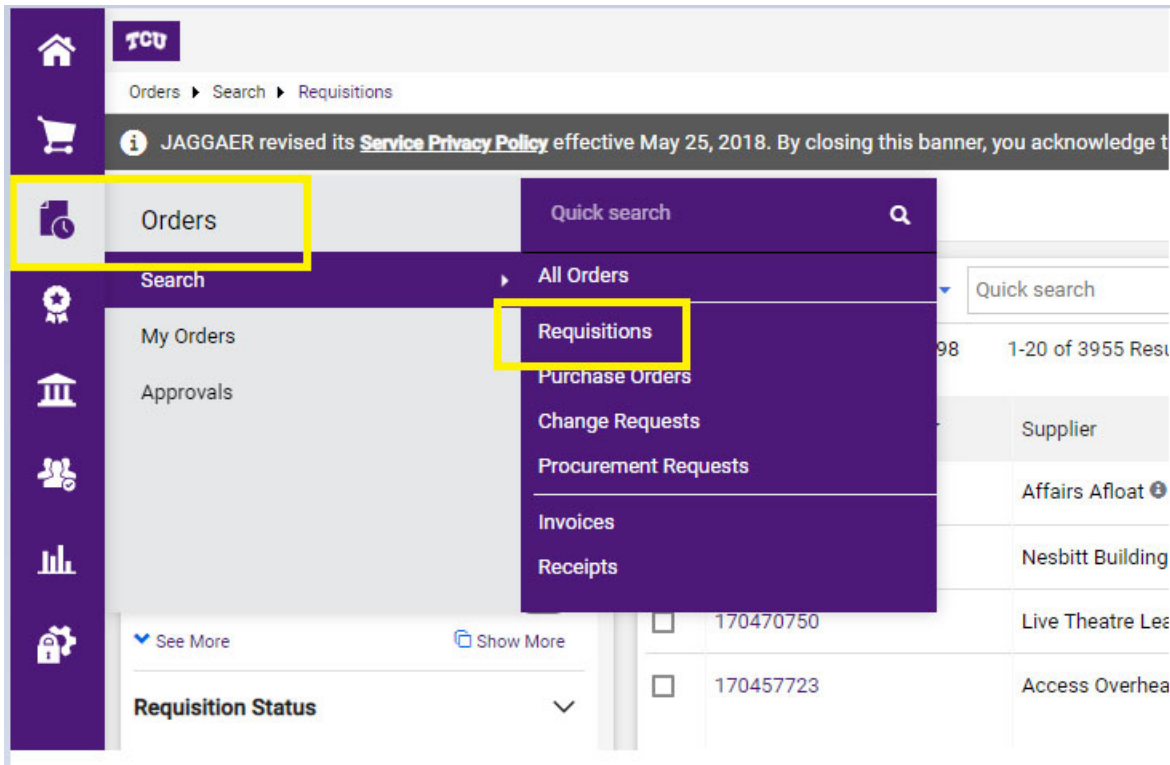
During fiscal year end, it will be very important for users to know where Non-Procurement requisitions submitted for payment are in the approval workflow.

- For FY26 expenses submitted in Jaggaer 5/29/26 or prior, Non-Procurement requisitions must be through all SDA approvals by 5:00pm CST, 5/29/26.
- For FY26 expenses submitted in Jaggaer 5/30/26 - 6/8/26, and the fiscal year review box was checked in the requisition, Non-Procurement requisitions must be through all SDA approvals by 5:00pm, CST 6/8/26.

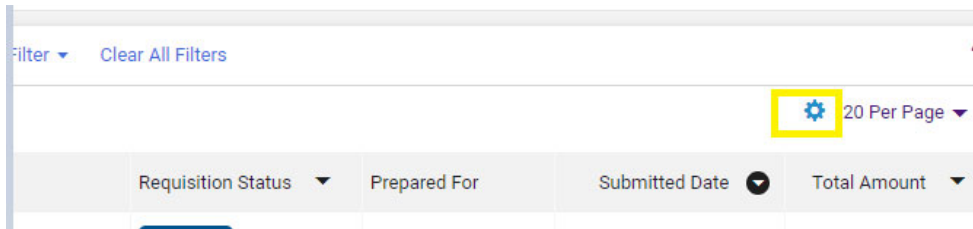
It is the department's responsibility to ensure all SDA approvals are obtained to meet the above deadlines.

To help identify where requisitions are in the approval workflow, Jaggaer users can filter the Requisition Orders listing to include a column identifying where the requisition is in workflow.

In Jaggaer, select Orders from the left-hand toolbar, then select Requisitions

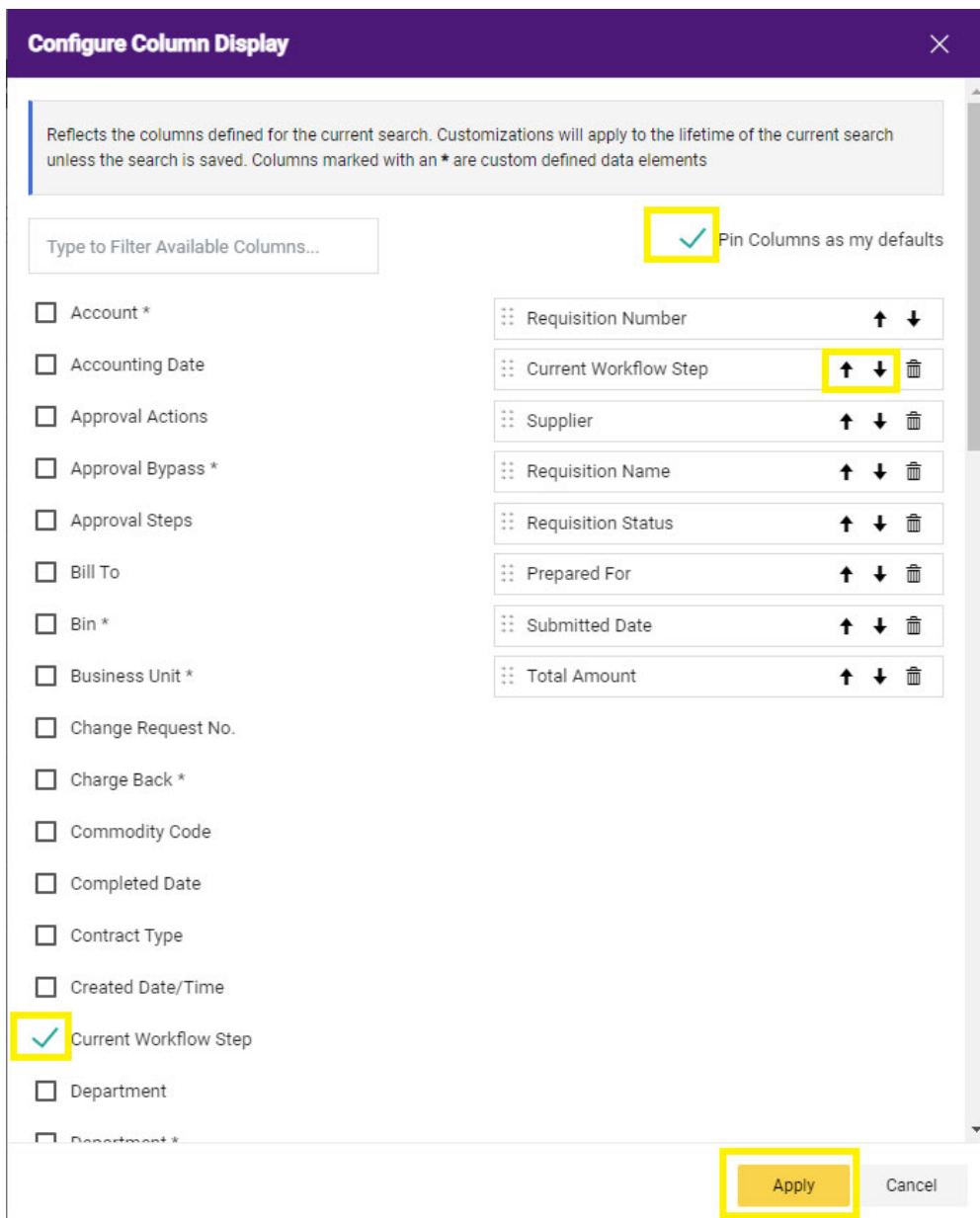


On the right side of your screen, click the settings wheel



In the pop-up box, check Current Workflow Step. Once checked, it will appear on the right where you can move it up or down in the order with the arrows. Moving it up or down changes which column the information will display in the report.

You must Pin Column as my defaults, and select Apply.





In the example below, several requisitions show a requisition status of “Pending” in purple with the current workflow step also in purple. The green requisition status indicating “Completed”, means the requisition has completed all SDA approvals.


Example: Kelly, Hart and Hallman, LLP is pending Special Approval (requisitions may be with a special approver, which is before AP’s step in the process), whereas Steven Anthony Bocanegra has been approved by AP, and is now awaiting approval by the Level 1 approver.


Example: Summus Industries, Inc. has completed all workflow, and the Requisition Status indicates “Completed”.


| Requisition Number | Current Workflow Step | Approval Steps | Supplier | Requisition Name | Requisition Status |
|--------------------|-----------------------|---------------------------|-----------------------------|-------------------------|--------------------|
| 213735256 | Special Approval | | Kelly,Hart and Hallman, LLP | 2026-03-19 106626984 03 | Pending |
| 213734714 | Level 1 Approval | Accounts Payable Approval | Bocanegra,Steven Anthony | 2026-03-19 108012223 03 | Pending |
| 213734690 | Level 1 Approval | Accounts Payable Approval | Bocanegra,Steven Anthony | 2026-03-19 108012223 02 | Pending |
| 213734403 | Level 1 Approval | Accounts Payable Approval | Bocanegra,Steven Anthony | 2026-03-19 108012223 01 | Pending |
| 213733722 | Level 1 Approval | Level 1 Approval | Summus Industries, Inc. | 2026-03-19 106626984 02 | Completed |











This column notes who has already approved

Users should click on the Requisition number to view what approvals are required.

After clicking on the requisition number, review the What’s Next section on the right-hand side of the requisition. Clicking on the Purple title of the workflow step shows *who* needs to approve.

All approvals must take place by 5/29/26 or 6/8/26 (if the Request Different Fiscal Year box was checked), to be recorded in FY26.

Example: Requisition is pending three levels of approval.

Requisition • 213735256

Summary | Comments | Attachments 1 | History

| General | Shipping | Billing | Summary |
|---|--|--|-------------------------------------|
| Business Unit TCU Texas Christian University Status Pending Special Approval | Ship To Attn: Terry Haney 3101 BELLAIRE DRIVE NORTH Fort Worth, TX 76109 | Bill To TCU-Financial Services TCU Box 297011 Fort Worth, TX 76129 | Subtotal What's next? |

What's next?

Workflow

Submitted
3/25/2024 8:20 AM
James Lehr

Accounts Payable Approval
Approved
✓ Lindsey Tullos-Rios

Level 1 Approval
Active
PROLBR - 34210 - Level 1
Abigail Jennings
ABBY.JENNINGS@tcu.edu

Level 2 Approval
Future
PROLBR - 34210 - Level 2
Daniel Williams
d.e.williams@tcu.edu
+1 817-257-5907

Level 3 Approval
Future
PROLBR - Level 3
Tracy Hull
t.hull@tcu.edu
+1 817-257-7696

Click on purple Levels for name of who must approve

All levels of SDA approvals must be completed by the deadlines