

Managing Approvals for eProcurement Requisitions

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Managing Approvals for eProcurement Requisitions

Approve an ePro Requisition

Procedure

In this topic you will learn how to Approve and ePro Requisitions through the Worklist and eProcurment Menus.

NOTE: DEPT_APPROVER roles are <u>no longer</u> self-approved for requisitions. These requisitions are now routed to another person for approval.

Step	Action
1.	Approve ePro Requisitions through the Worklist
2.	Requisition approvals may be performed via a few methods. This document includes the methods of approving from the Worklist and approving from the Manage Requisition Approvals menu option.
	Requisition approvers, who are familiar with the existing Purchase Requisition approvals, will know how to approve from the Worklist and may skip this section of the document. New requisition approvers should follow the exercise.



Step	Action
3.	After using the launcher to log into PeopleSoft Financials, at the top right of the landing page, click the NavBar icon.
	Click the NavBar link.
	\oslash
4.	Click the Menu button.
	Menu
5.	Click the Down scrollbar.
6.	Click the Worklist link.
	Worklist
7.	Click the My Worklist - Detail View link.
	My Worklist - Detail View
8.	On the Worklist view, select an item in the list for approval.
	Click the Requisition , 681201, ZZREQ_ONESTEP, 2012-10-12, N, 0, BUSINESS_UNIT:LSUSH REQ_ID:0079962, link.
	Requisition. 681201. ZZREQ_ONESTEP. 2012-10-12. N. 0. BUSINESS_UNIT:LSUSH REQ_ID:0079962. ID:0079962.
9.	The Requisition Details displays.
	As the Approver, you may scroll through the requisition lines, review comments, add comments, print the requisition, and edit the requisition prior to approving or denying the requisition.
	Enter the desired information into the Enter Approver Comments field. Enter "Approving Example".
10.	Click the Approve button.
	Approve

Step	Action
11.	Return to the Worklist to view the next item.
	Click the Return to Worklist button.
	Return to Worklist
12.	The Worklist displays.
	Click the Home button
	ស
13.	Approve ePro Requisitions through the eProcurement Menu
14.	An alternative method to navigate to the Worklist is through the <i>eProcurement</i> menu option.
	Click the NavBar button.
	\oslash
15.	Click the Menu button.
	 Menu
16.	Click the Down scrollbar.
17.	Click the eProcurement link.
	eProcurement
18.	Click the Manage Requisition Approvals menu.
	Manage Requisition Approvals

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ocate requisitions that require your approva	al (or requisitions that	previously required your approval).	edit the criteria below and	d click the Search but	on.							
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Step	Action
19.	 The Manage Requisition Approvals page displays. Approvers have several options to use to search for requisitions awaiting their approval. You may use requisition ID, date range, requester, etc. to filter search results. In this example, the approver is searching for anything requested by user SROGER. NOTE: You must use all capital letters when typing ID in this field, or you can use lower case letters and then the magnifying glass to the right of the field. Enter the desired information into the Requester field. Enter "SROGER".
20.	Click the Search button.
	Search

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To locate requisitions that	t require your app	proval (or requisitions that	t previously re	quired your a	pproval), edit the	criteria below and	I click the Sea	rch button.								
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Reques	ster SROGER	٩		E	ntered by		Q									
Search C	lear				5	Show Advanced S	earch									
-																
Requisitions																
To view the complete de	tails and approve	e a Requisition, click the r	equisition ID I	ink.												
Expand All	Collapse All															
Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	То	tal								
P O Pending	0079957	0079957	LSUSH	02/08/2023	3 Rogers, Shelia	Rogers, Shelia	998.00	USD								
Create New Requisition	1	Manage Requisitions														

Step	Action
21.	In the search results, each requisition appears as a pending line. To the left of the word "pending" there is an arrow. By selecting the arrow, the requisitions information displays.
22.	To approve the requisition, select the link in the ReqID column for the same requisition. Click the Req ID 0079957 link.

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Step	Action
23.	The Approval section displays. If desired, enter comments and click Approve. If no comments are needed, just press Approve.
	Enter the desired information into the Enter Approver Comments field. Enter " Approving Example ".
24.	Click the Approve button.
	Approve

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Step	Action
25.	The approval displays. You may select the <i>Next in Line</i> to continue to go through the requisitions needing approval. Or, you may choose to <i>Return to Approve Requisitions</i> .

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Step	Action
26.	This completes Approve ePro Requisitions through the Worklist and eProcurement Menus. End of Procedure.

Deny an ePro Requisition

Procedure

In this topic you will learn how to Deny an ePro Requisition.

Step	Action
1.	The purpose of this exercise is to demonstrate the approver's ability to Deny a requisition and what occurs to the requisition.



Step	Action
2.	An alternative method to navigate to the Worklist is through the <i>eProcurement</i> menu option.
	Click the NavBar button.
	\otimes

Step	Action
3.	Click the Menu button.
4.	Click the Down scrollbar.
5.	Click the eProcurement link. eProcurement
6.	Click the Manage Requisition Approvals menu. Manage Requisition Approvals
7.	Approvers have several options to use to search requisitions awaiting their approval. You may search by requisition id, date range, requester, etc. In this example, the approver will search for anything requested by <i>BMCPHE</i> . <i>NOTE: Requester must be entered in ALL CAPS.</i> Enter the desired information into the Requester field. Enter " BMCPHE ".
8.	Click the Search button.

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Manage Requisition Approv Search Requisitions To locate requisitions that require your ap Requisition ID Business Unit Date From (05/04/2022 Requester BMCPHE Search Clear Requisitions To view the complete details and approv Collapse All Action/Status Res ID	Vals	previously r equisition ID	equired your Requis	approval), edit ti ition Name *Status Pe Date To 055 Entered by Requester	he criteria below nding 04/2023 Show Advanced Entered By	and click the	Search button.			New	r Window	y Help) Perso	onalize	Page
Create New Requisition	Biochemistry Witt lab	LSUSH	02/07/2023	McPherson,Bri	ttanyMcPherson, ny N.	Britta 353.4	H USD								

Step	Action
9.	Click the arrow next to the requisition to view the details.
	Click the Expand Section button.
10.	As the manager, you realize that these items have already been ordered and you want to deny the requisition.
	Click the Req ID 0079939 link.
	0079939
11.	Enter comments as to why you are denying the requisition.
	Enter the desired information into the Enter Approver Comments field. Enter " Denied - Duplicate order ".
12.	Click the Deny button.
	O Deny

Step	Action
13.	The requisition status is denied. You may verify this by navigating to: NavBar > Menu > eProcurement > Manage Requisitions.
	Click the NavBar button.
14.	Click the Menu button.
	Menu
15.	Click the eProcurement link.
	eProcurement
16.	Click the Manager Requisitions link.
	Manage Requisitions
17.	Enter the desired information into the Requisition ID field. Enter "0079939".
18.	Enter the desired information into the Requester field. Enter " BMCPHE ".
	NOTE: Requester must be entered in ALL CAPS.
19.	NOTE: Make sure the Date From through Date To range includes the date the requisition was created.
	Click the Calendar button.
20.	Click the Search button.
	Search

Manage Requisitions X	+					V	-	٥	×
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Manage Requisitions						New Wir	idow Hel	p Persona	lize Page
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To locate requisitions, edit the criteria below an	nd click the Search button.								
Business Unit LSUSH	Q Requisit	ion Name					1	۹	
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Requisitions (2)									
To view the lifespan and line items for a requisi To edit or perform another action on a requisitie	tion, click the Expand triang on, make a selection from t	le icon. 1e Action dropdown	list and click Go.						
Reg ID Requisition Name	BU Date	Request State	Budget	Total					
0079939 Biochemistry Witt lab	LSUSH 02/07/202	Denied	Not Chk'd	353.41 USD [[Select Ac	ion]	~	Go		
Create New Requisition Review 0	Change Request	Review Change	e Tracking	Manage Receipts Re	equisition Repo	ort			

Step	Action
21.	The requisition information displays with a Request Status of Denied .
22.	This completes <i>Deny an ePro Requisition</i> . End of Procedure.

Hold an ePro Requisition

Procedure

In this topic you will learn how to Hold an ePro Requisition.

Step	Action
1.	The purpose of this exercise is to demonstrate the approver's ability to Hold a requisition and what occurs to the requisition.



Step	Action
2.	An alternative method to navigate to the Worklist is through the <i>Purchasing</i> menu option. Click the NavBar button.

Step	Action
3.	Click the Menu button.
	Menu
4.	Click the Down scrollbar.
5.	Click the eProcurement link.
	eProcurement
6.	Click the Manage Requisition Approvals menu.
	Manage Requisition Approvals

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No search results were found. Create New Requisition	Manage Requisitions										

Step	Action
7.	Approvers have several options to use to search requisitions awaiting their approval. You may search by requisition id, date range, requester, etc. In this exercise, users will change the Date From and enter the Requester .
	Enter the desired information into the Date From field. Enter "020123".
8.	In this exercise, the approver will search for anything requested by PFITCH .
	NOTE: Requester must be entered in ALL CAPS.
	Enter the desired information into the Requester field. Enter " PFITCH ".
9.	Click the Search button.
	Search

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Step	Action
10.	Click the arrow next to the requisition to view the details.
	Click the Expand Section button.

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Step	Action
11.	As the approver, you would like to discuss alternatives with the requester. For this exercise, the approver will place the ePro requisition on Hold .
	Click the Req ID - 0079953 link.
	0079953

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Step	Action
12.	Enter comments as to why you are holding the requisition.
	Enter the desired information into the Enter Approver Comments field. Enter " Hold requisition to consider other options. ".
13.	Click the Hold button.

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Step	Action
14.	The requisition has been put on Hold. You may verify this by navigating to: NavBar > Menu > eProcurement > Manage Requisitions.
	Click the NavBar link.

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Step	Action
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Step	Action
16.	Click the Down scrollbar.

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Step	Action
17.	Click the eProcurement link.
	eProcurement
18.	Click the Manage Requisitions link.
	Manage Requisitions
19.	Enter the desired information into the Date From field. Enter "020123".
20.	Enter the desired information into the Requester field. Enter " PFITCH ".
21.	Click the Search button.
	Search

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Step Ac	tion
22. Cli Re	ick the Expand Section button to the left of the Req ID field. In this example, eq ID 0079963.

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Step	Action
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Return to Manage Requisitions									

Step	Action
24.	In rhe Review/Edit Approvers section, users can view the requisition on Hold , who placed the Hold , and the date and time of the Hold .
	Click the Return to Manage Requisitions link.
	Return to Manage Requisitions
25.	This completes <i>Hold an ePro Requisition</i> . End of Procedure.