



# **Managing Approvals for eProcurement Requisitions**

**Version Date: May 8, 2023**

**Training Guide**  
**Managing Approvals for eProcurement**  
**Requisitions**

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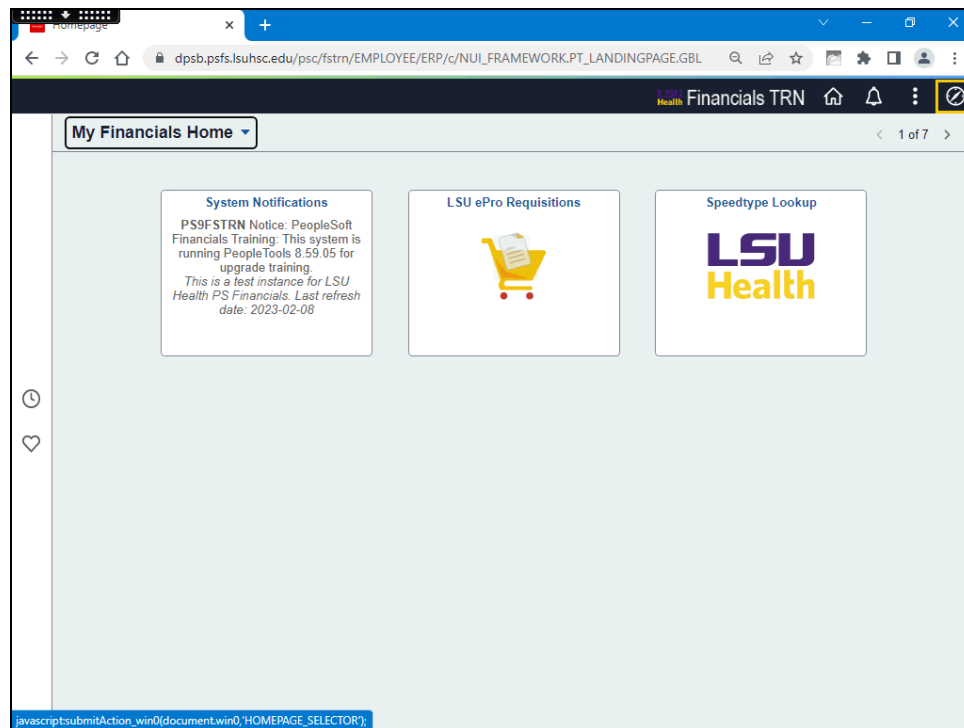
## Managing Approvals for eProcurement Requisitions

### Approve an ePro Requisition

#### Procedure

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

Step	Action
1.	<b>Approve ePro Requisitions through the Worklist</b>
2.	<p>Requisition approvals may be performed via a few methods. This document includes the methods of approving from the <b>Worklist</b> and approving from the <b>Manage Requisition Approvals</b> menu option.</p> <p>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.</p>




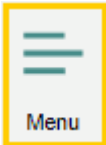

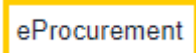



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## Managing Approvals for eProcurement Requisitions

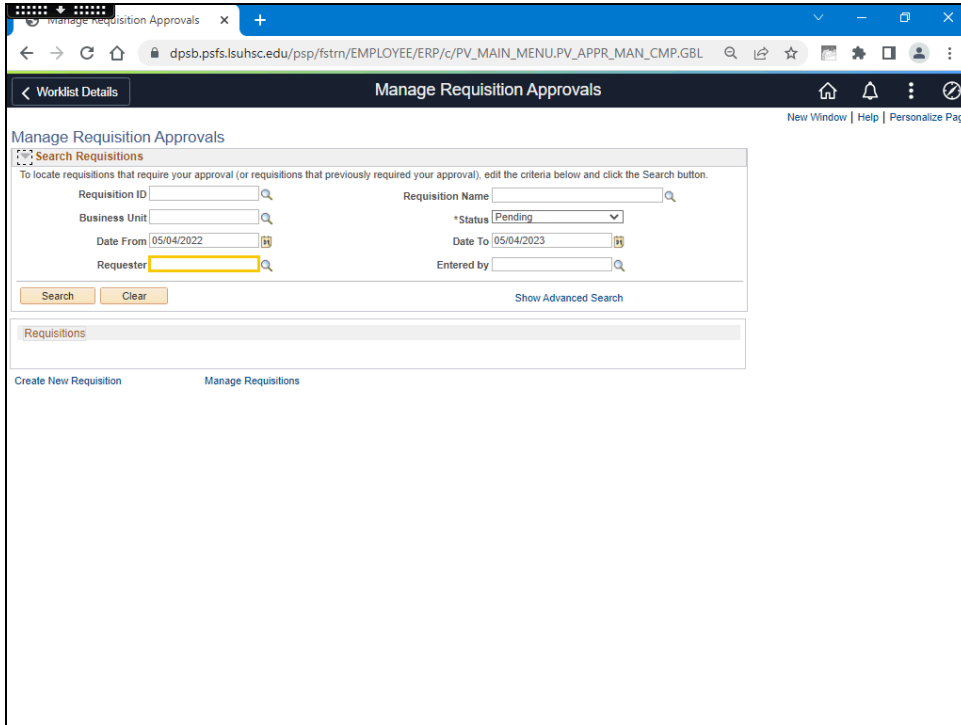
Step	Action
3.	<p>After using the launcher to log into PeopleSoft Financials, at the top right of the landing page, click the NavBar icon.</p> <p>Click the <b>NavBar</b> link.</p> 
4.	<p>Click the <b>Menu</b> button.</p> 
5.	<p>Click the <b>Down</b> scrollbar.</p> 
6.	<p>Click the <b>Worklist</b> link.</p> 
7.	<p>Click the <b>My Worklist - Detail View</b> link.</p> 
8.	<p>On the Worklist view, select an item in the list for approval.</p> <p>Click the <b>Requisition, 681201, ZZREQ_ONESTEP, 2012-10-12, N, 0, BUSINESS_UNIT:LSUSH REQ_ID:0079962</b>, link.</p> 
9.	<p>The <i>Requisition Details</i> displays.</p> <p>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.</p> <p>Enter the desired information into the <b>Enter Approver Comments</b> field. Enter "<b>Approving Example</b>".</p>
10.	<p>Click the <b>Approve</b> button.</p> 


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

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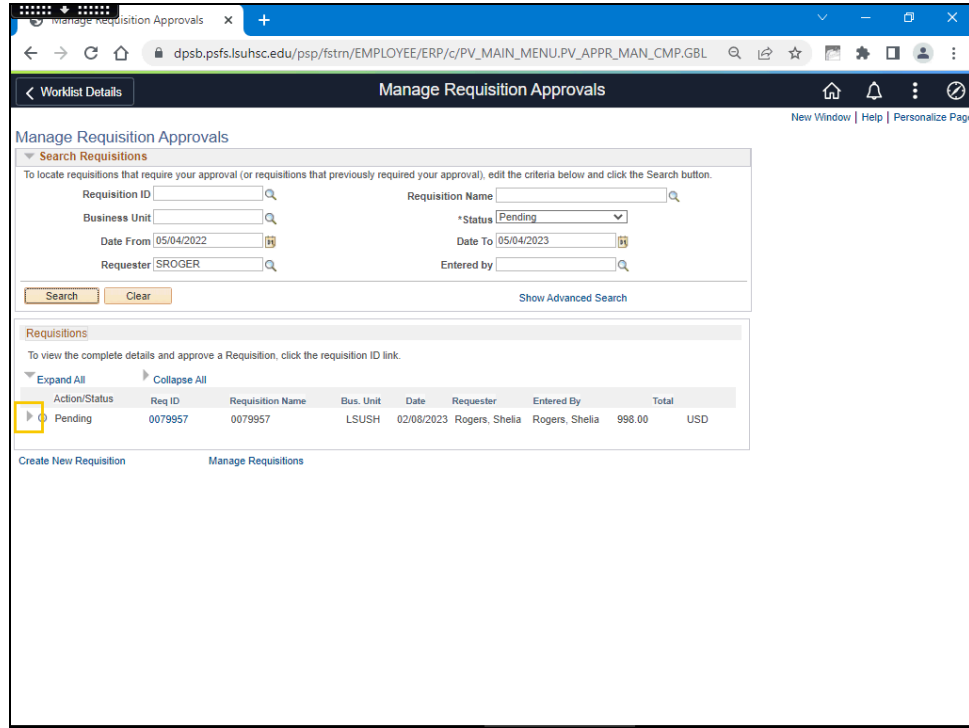
## Managing Approvals for eProcurement Requisitions



Step	Action
19.	<p>The <b>Manage Requisition Approvals</b> 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 <i>SROGER</i>.</p> <p><i><b>NOTE:</b> 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.</i></p> <p>Enter the desired information into the <b>Requester</b> field. Enter "<b>SROGER</b>".</p>
20.	<p>Click the <b>Search</b> button.</p> 

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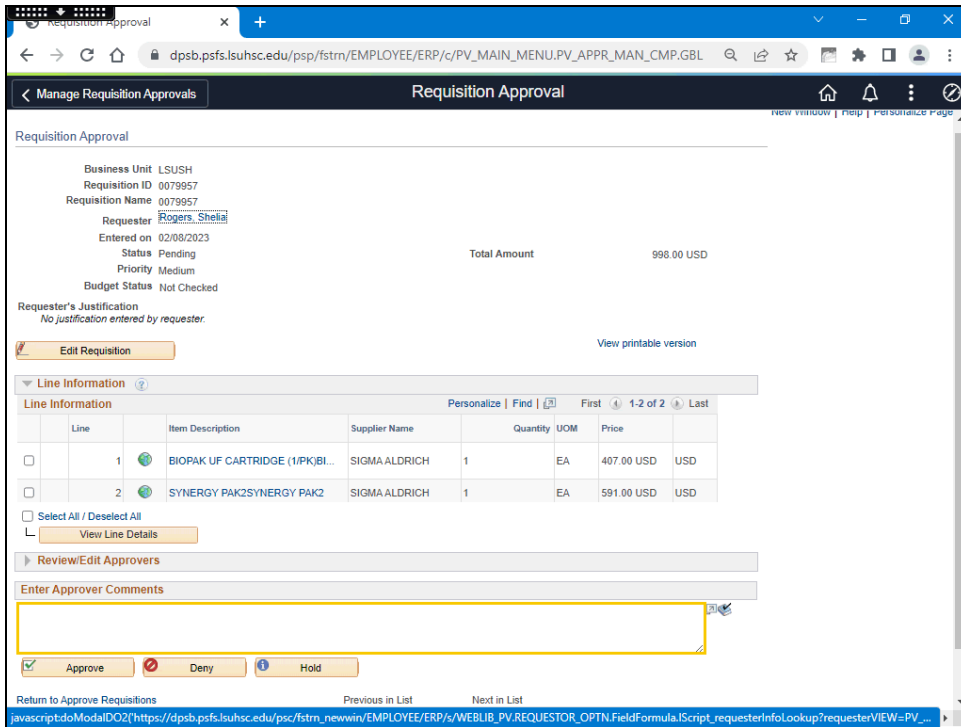
## Managing Approvals for eProcurement Requisitions

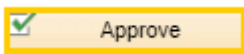


Step	Action
21.	In the search results, each requisition appears as a pending line. To the left of the word "pending" there is an arrow. By selecting the arrow, the requisitions information displays.
22.	To approve the requisition, select the link in the ReqID column for the same requisition.  Click the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

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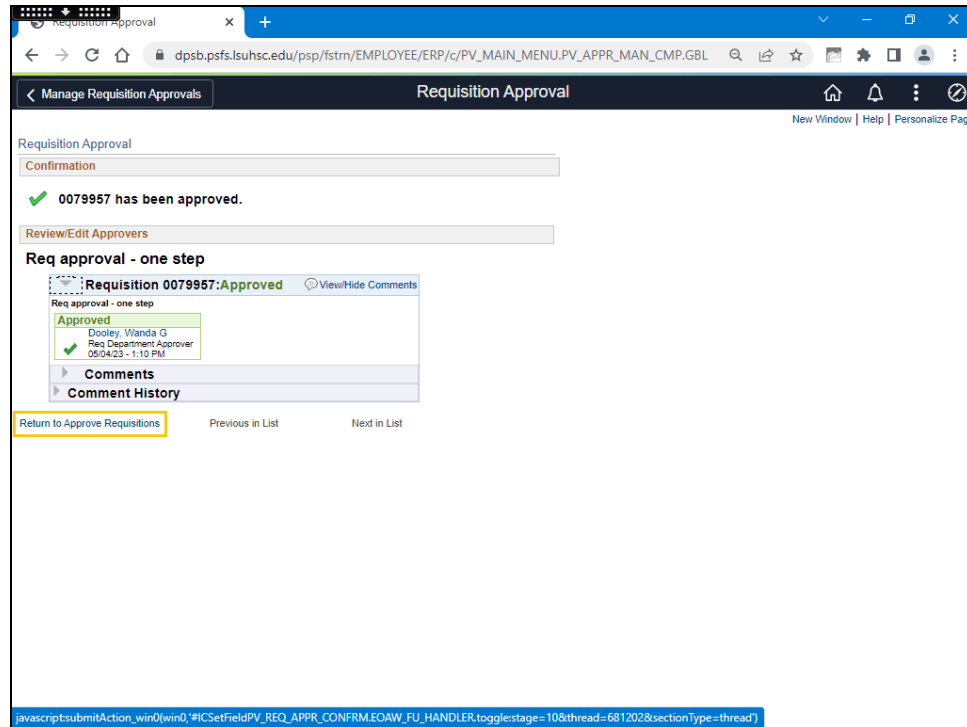
## Managing Approvals for eProcurement Requisitions



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



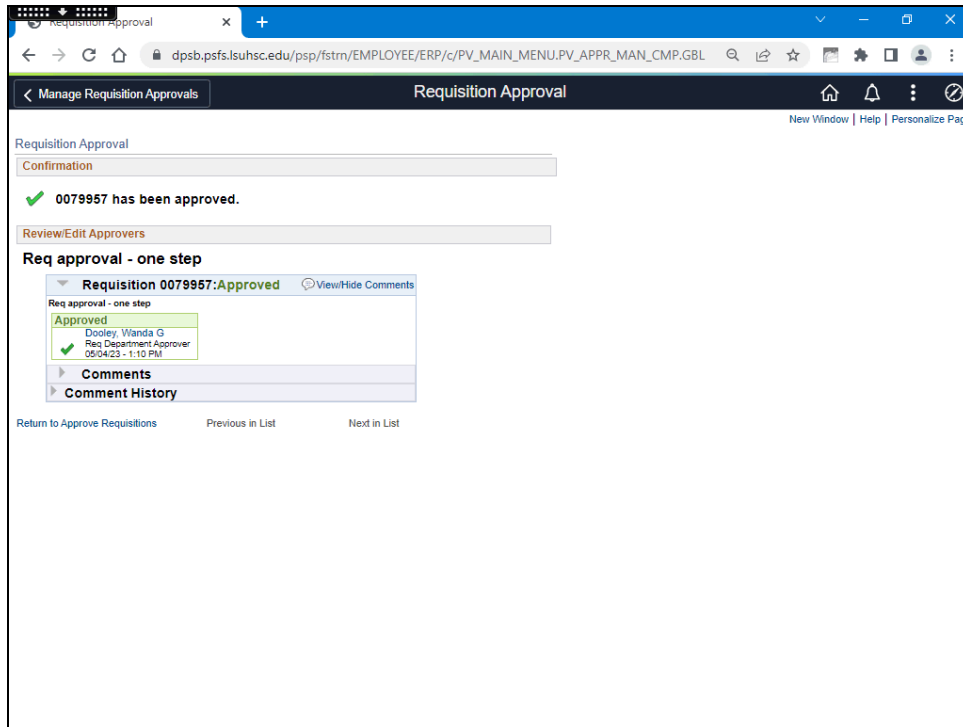
# Training Guide Managing Approvals for eProcurement Requisitions



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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## Managing Approvals for eProcurement Requisitions



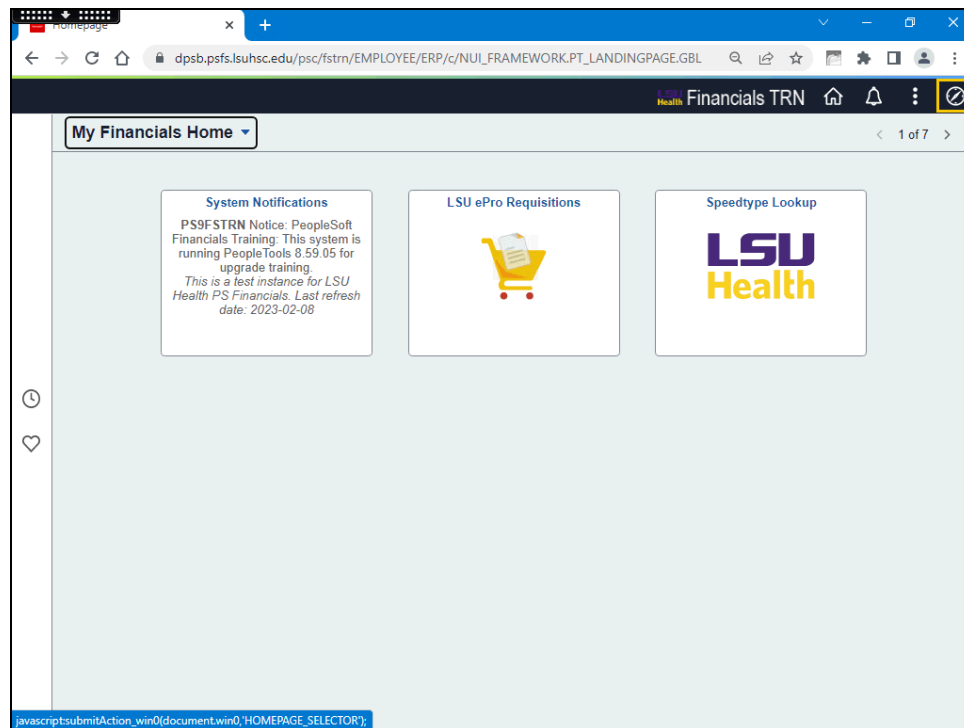
Step	Action
26.	This completes <i>Approve ePro Requisitions through the Worklist and eProcurement Menus.</i> <b>End of Procedure.</b>


## Deny an ePro Requisition

### Procedure

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

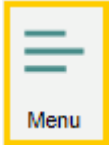

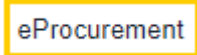


Step	Action
1.	The purpose of this exercise is to demonstrate the approver's ability to <b>Deny</b> a requisition and what occurs to the requisition.



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

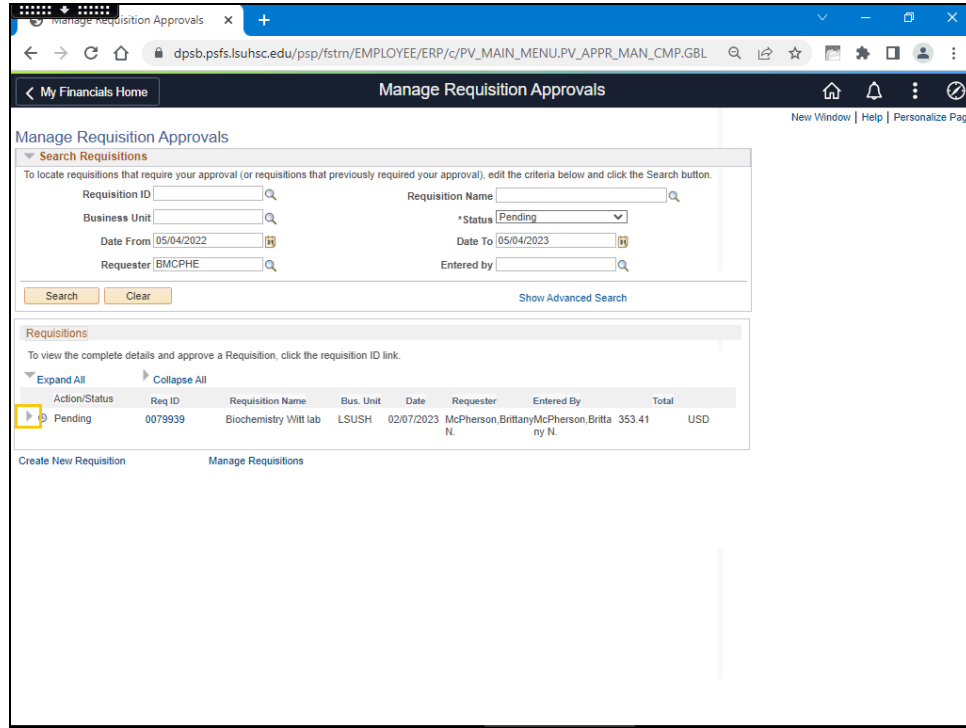
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### Managing Approvals for eProcurement Requisitions

Step	Action
3.	Click the <b>Menu</b> button. 
4.	Click the <b>Down</b> scrollbar. 
5.	Click the <b>eProcurement</b> link. 
6.	Click the <b>Manage Requisition Approvals</b> menu. 
7.	<p>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>.</p> <p><b>NOTE: Requester must be entered in ALL CAPS.</b></p> <p>Enter the desired information into the <b>Requester</b> field. Enter "<b>BMCPHE</b>".</p>
8.	Click the <b>Search</b> button. 

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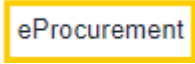


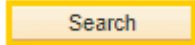
## Managing Approvals for eProcurement Requisitions



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

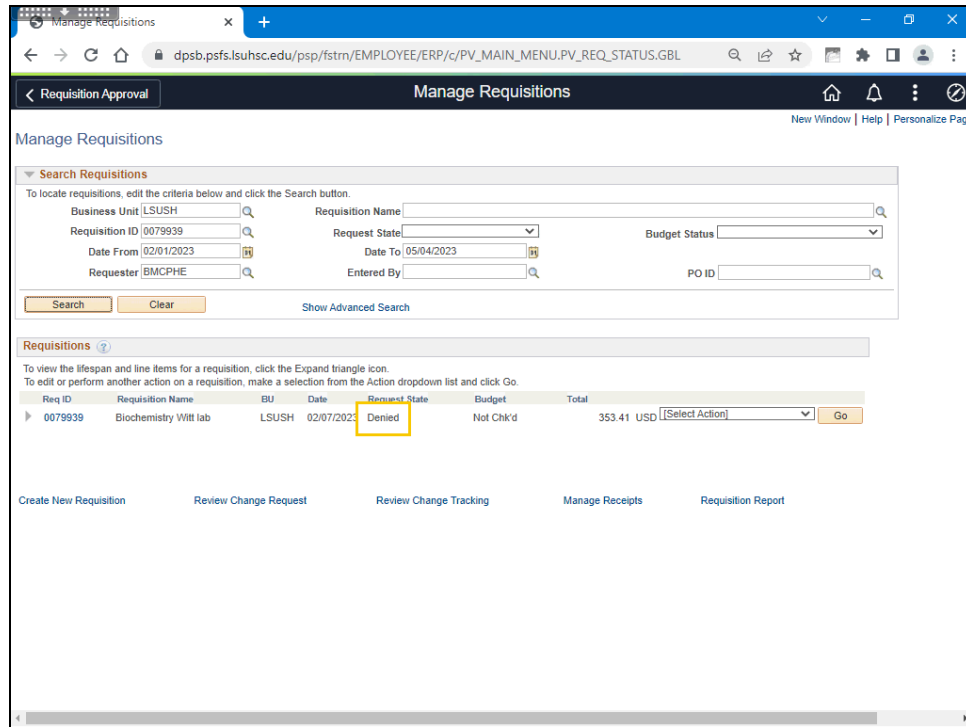
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### Managing Approvals for eProcurement Requisitions

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

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## Managing Approvals for eProcurement Requisitions



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

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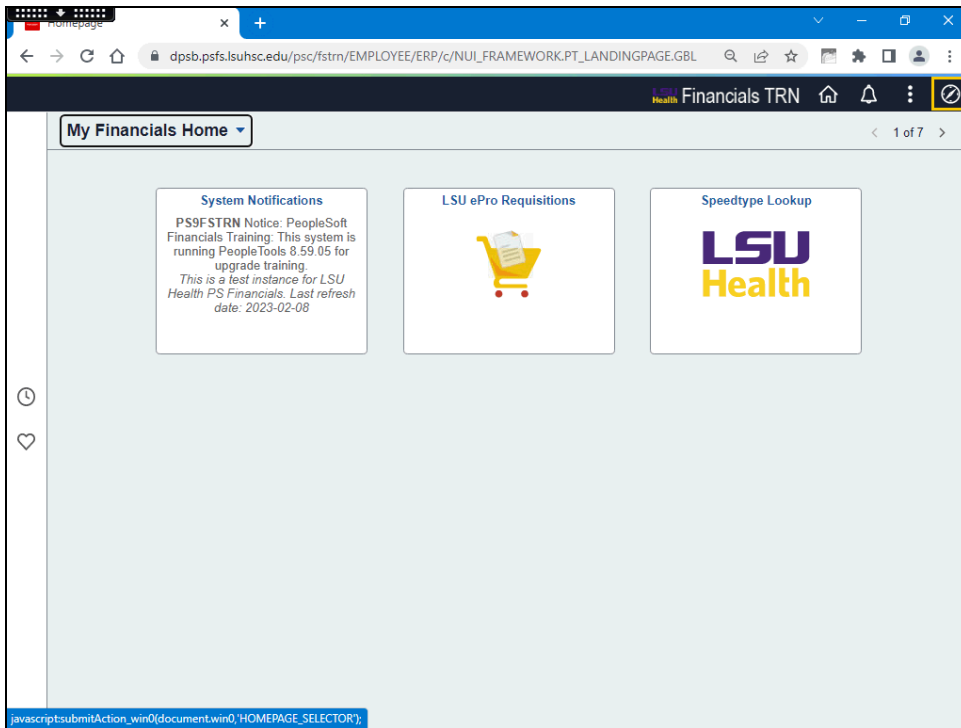
## Managing Approvals for eProcurement Requisitions


### 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 <b>Hold</b> a requisition and what occurs to the requisition.

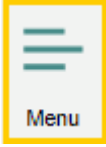


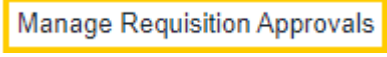


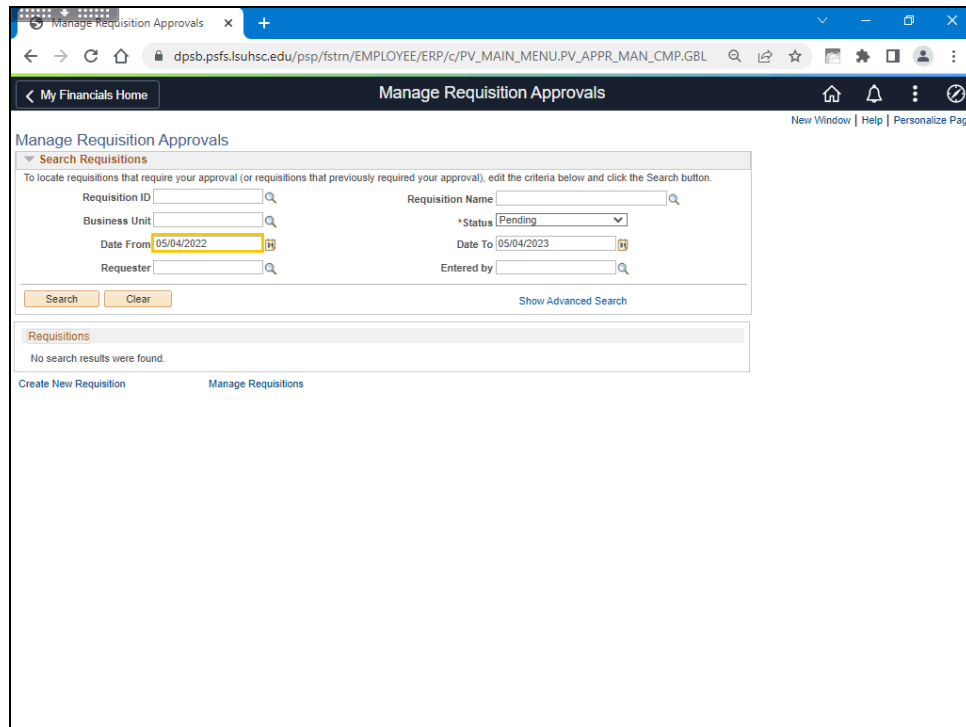
Step	Action
2.	An alternative method to navigate to the Worklist is through the <i>Purchasing</i> menu option.  Click the <b>NavBar</b> button. 



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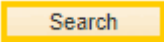
## Managing Approvals for eProcurement Requisitions

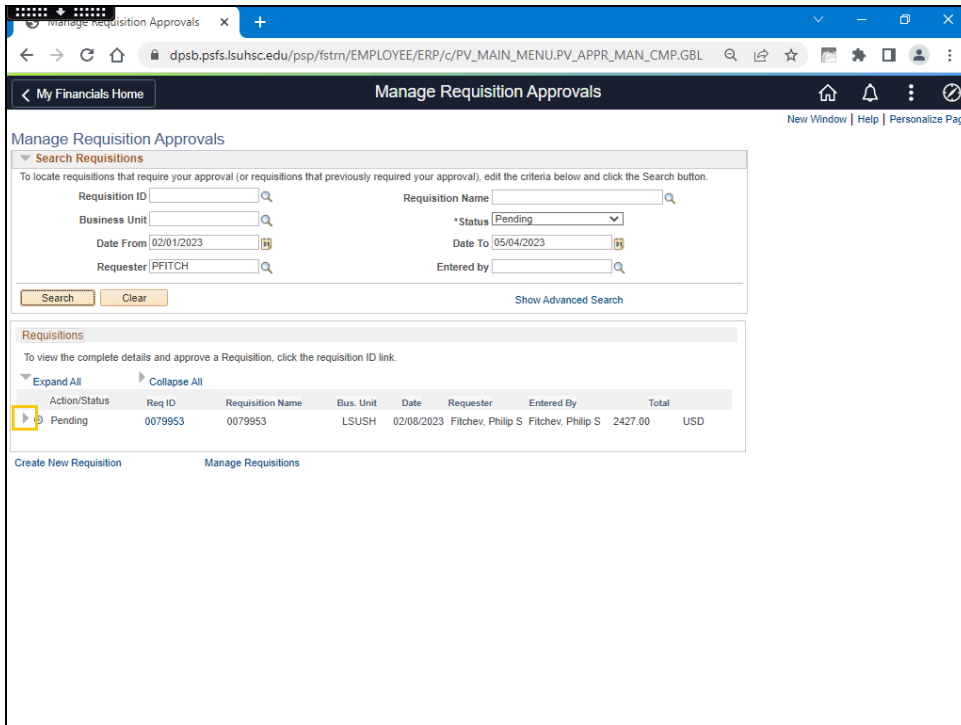
Step	Action
3.	Click the <b>Menu</b> button. 
4.	Click the <b>Down</b> scrollbar. 
5.	Click the <b>eProcurement</b> link. 
6.	Click the <b>Manage Requisition Approvals</b> menu. 




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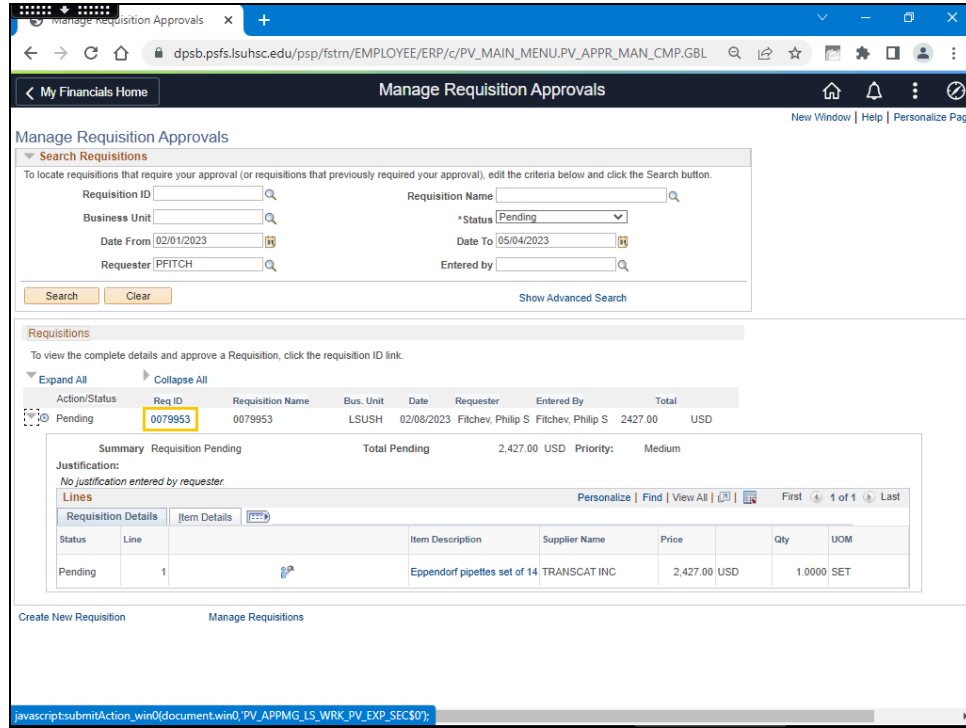
## Managing Approvals for eProcurement Requisitions

Step	Action
7.	<p>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 <b>Date From</b> and enter the <b>Requester</b>.</p> <p>Enter the desired information into the <b>Date From</b> field. Enter "<b>020123</b>".</p>
8.	<p>In this exercise, the approver will search for anything requested by <b>PFITCH</b>.</p> <p><i>NOTE: Requester must be entered in ALL CAPS.</i></p> <p>Enter the desired information into the <b>Requester</b> field. Enter "<b>PFITCH</b>".</p>
9.	<p>Click the <b>Search</b> button.</p> 



Step	Action
10.	<p>Click the arrow next to the requisition to view the details.</p> <p>Click the <b>Expand Section</b> button.</p> 

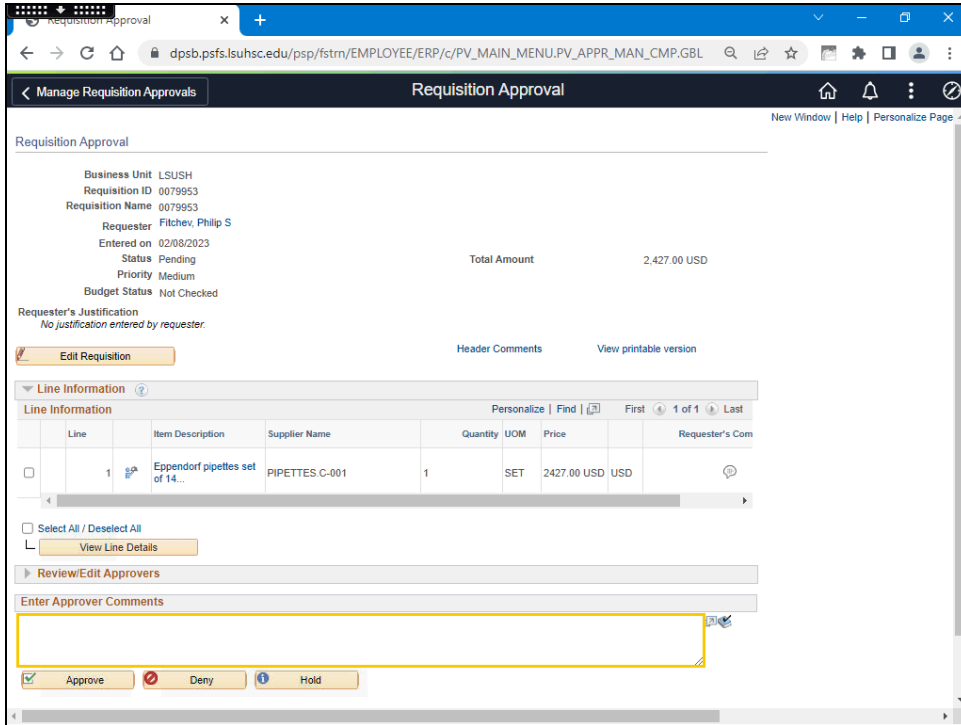
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Step	Action
11.	<p>As the approver, you would like to discuss alternatives with the requester. For this exercise, the approver will place the ePro requisition on <b>Hold</b>.</p> <p>Click the <b>Req ID - 0079953</b> link.</p> <p><b>0079953</b></p>

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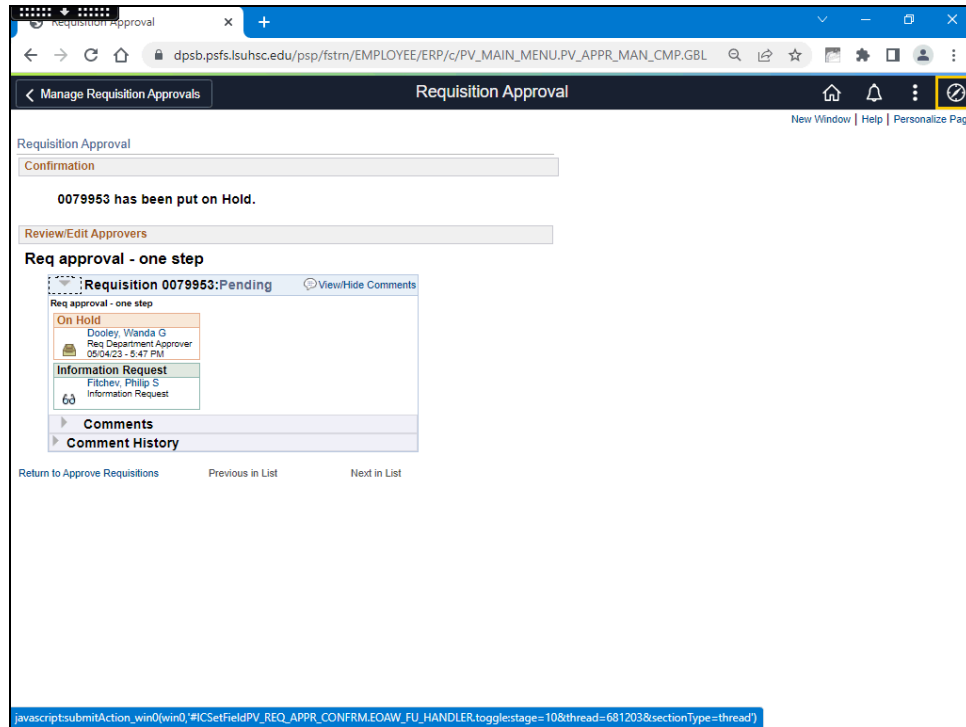
## Managing Approvals for eProcurement Requisitions




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

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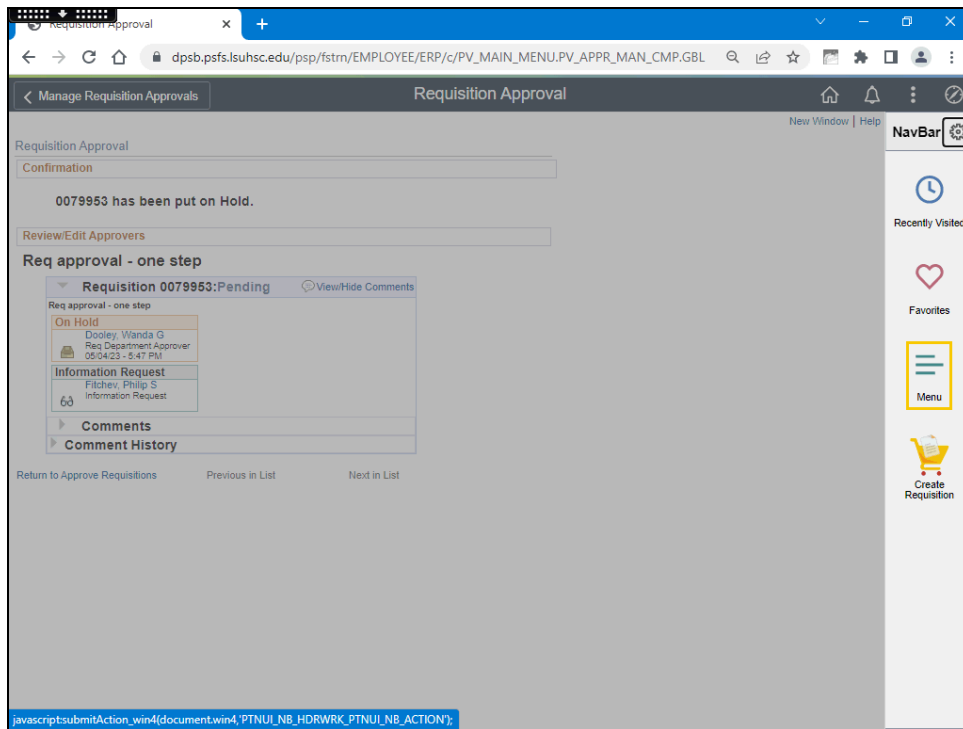
## Managing Approvals for eProcurement Requisitions




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

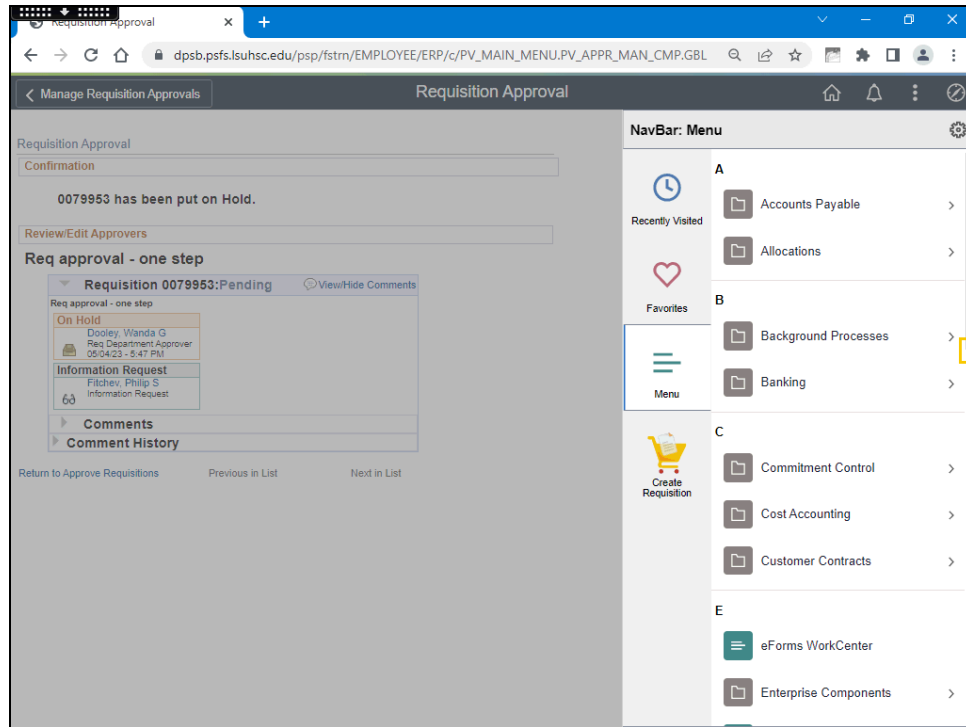
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Step	Action
15.	Click the <b>Menu</b> link. 

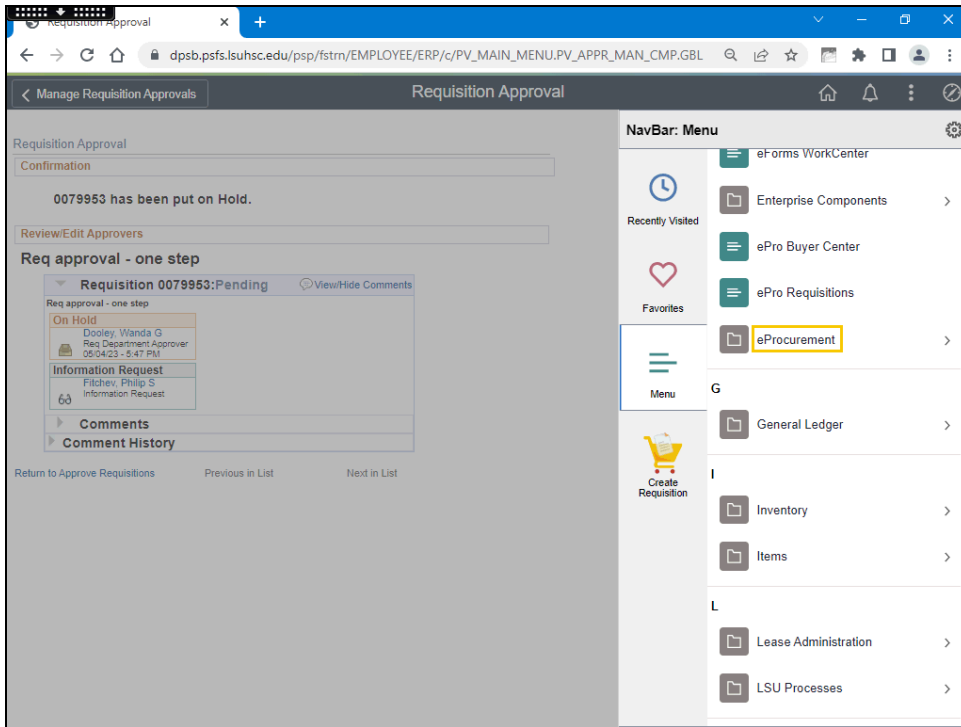
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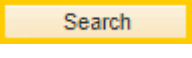


Step	Action
16.	Click the <b>Down</b> scrollbar. 

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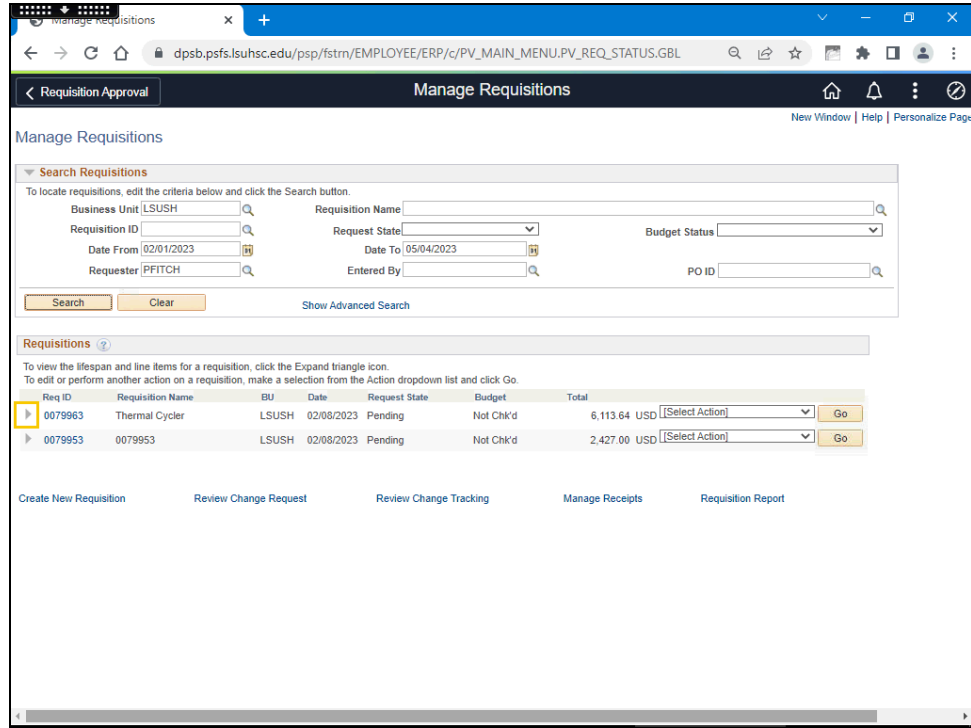
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Step	Action
17.	Click the <b>eProcurement</b> link. 
18.	Click the <b>Manage Requisitions</b> link. 
19.	Enter the desired information into the <b>Date From</b> field. Enter " <b>020123</b> ".
20.	Enter the desired information into the <b>Requester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



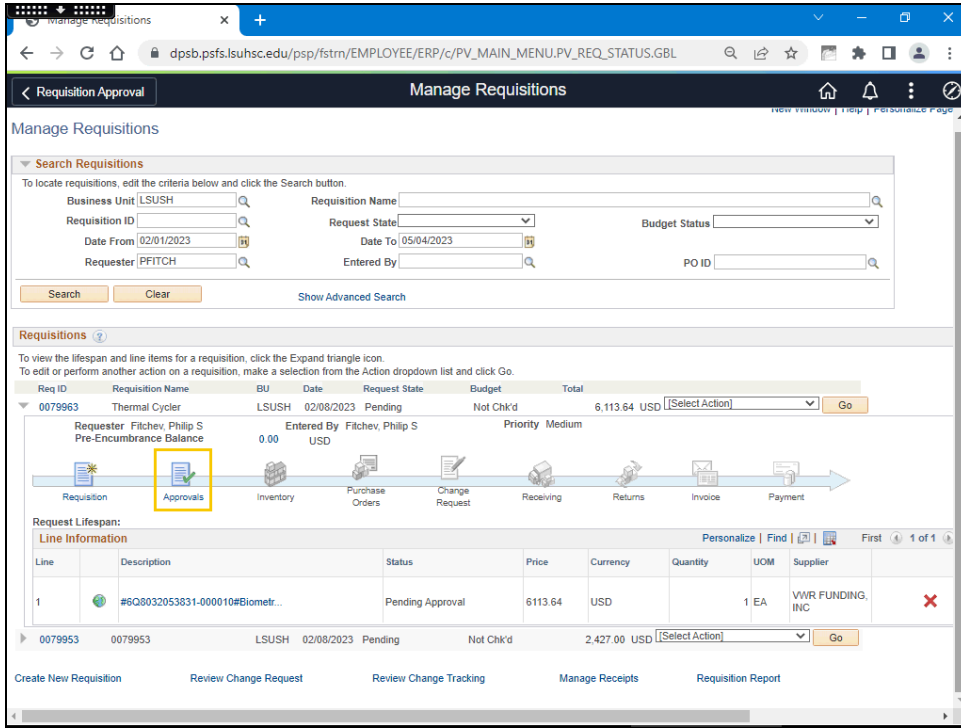
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Step	Action
22.	<p>Click the <b>Expand Section</b> button to the left of the Req ID field. In this example, <b>Req ID 0079963</b>.</p> 

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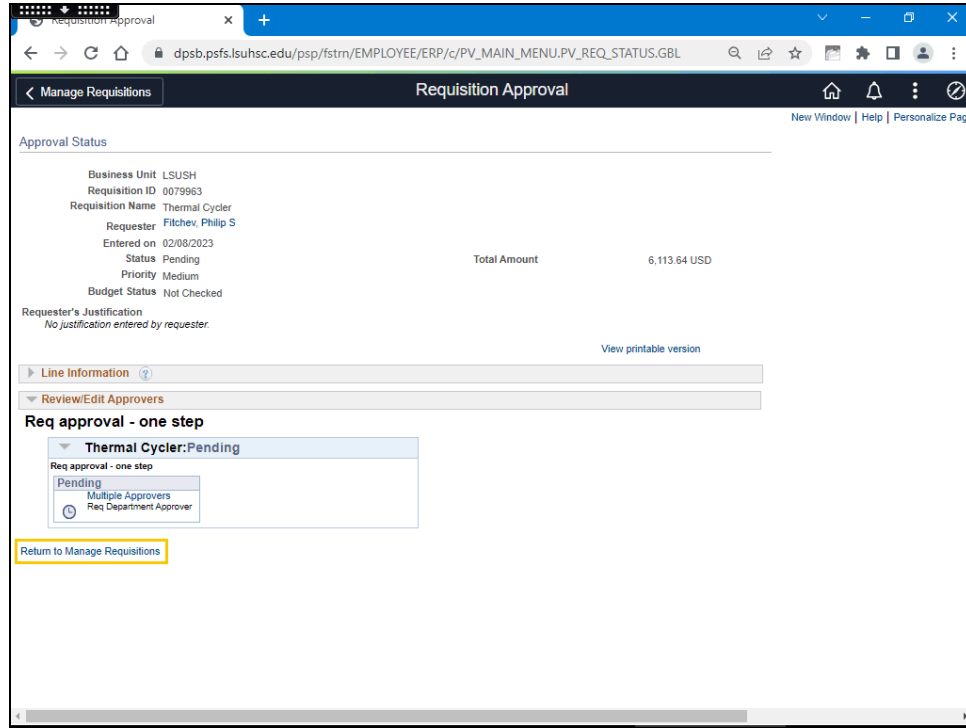
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Step	Action
23.	Click the <b>Approvals</b> button. 

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## Managing Approvals for eProcurement Requisitions



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