

PeopleSoft Training

Approving_Requisitions_9_2

Version Date: March 2016

Training Guide

Approving_Requisitions_9_2

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Approving_Requisitions_9_2

Welcome to the **PeopleSoft 9.2 Financials Workflow - Approving Requisitions** module! This module contains the tools needed to learn many of the concepts and procedures involved in approving requisitions.

Participant Objectives

At the end of this module you will be able to.....

1. Open the Worklist; and
2. Approve, Deny or Hold a requisition.

NOTE to ALL:

The functions in this guide must be performed in the Financials Production Database.

The Budget Check process **must** be run after approval of the requisition. The Budget Check process “freezes” the ChartString in the requisition. Each Department should decide who will assume responsibility for the Budget Check process (i.e. the Requester or Approver).

NOTE to LSUSH and LSUNO ONLY:

Requisitions must be Budget Checked by the Department prior to Purchasing sourcing (i.e. generating) the requisition to a Purchase Order or RFQ - Request for Quote (for bid). Any requisition that does not have a Valid Budget Check Status will be returned to the Department to run the Budget Check process and ensure that it is Valid. This will speed up the processing of a PO or RFQ.

See the “Budget Check a Requisition” manual for instructions on how to run the Budget Check process and how to change the ChartString(s) on a Budget Checked requisition prior to the requisition being sourced to a PO or RFQ.

Contacts for Assistance

- For **technical assistance** with PeopleSoft (e.g. problems accessing PeopleSoft, assistance with changing password, etc.), contact the Help Desk as follows:

Long Distance: 1-800-303-3290

Local Calls: 1-504-568-HELP (4357)

or

Email: helpdesk@lsuhsc.edu

- For **functional assistance** with PeopleSoft (e.g. questions about approving requisitions), contact your Buyer or Purchasing Superuser if your Buyer is not available.

Workflow - Approving Requisitions

Opening Your Worklist

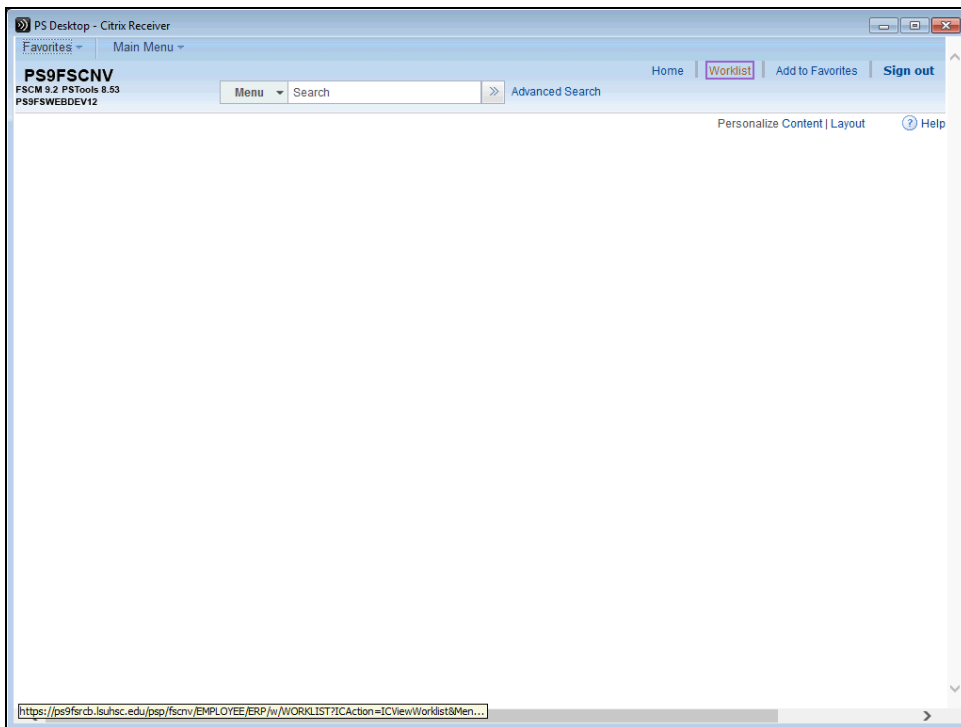
Procedure


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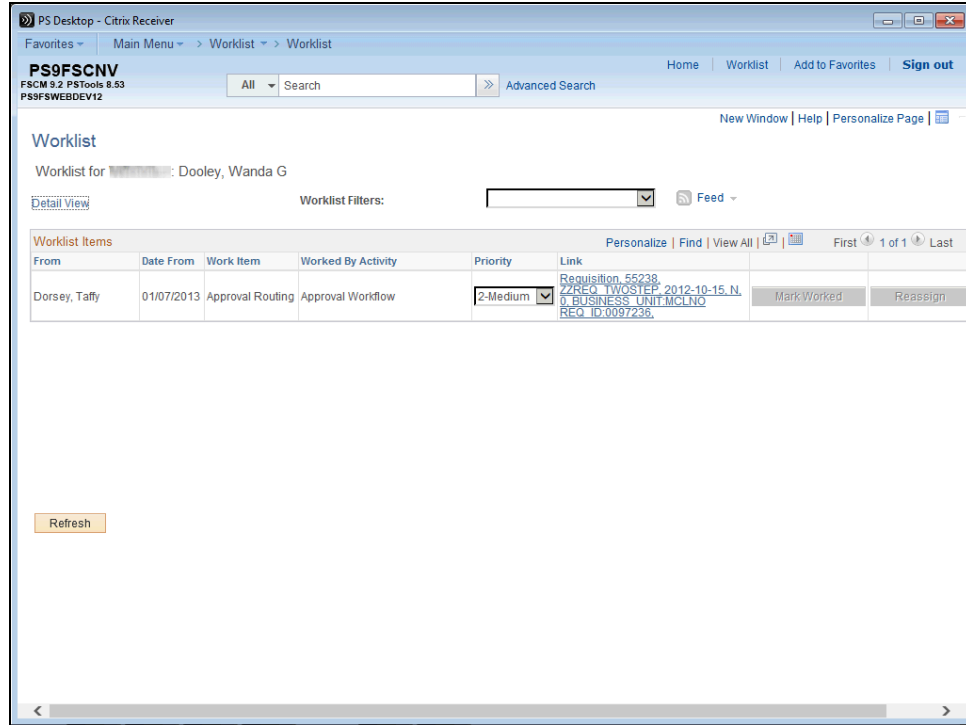
Approving_Requisitions_9_2

In this topic you will learn how to **Open Your Worklist**.

Step	Action
1.	<p>When an Approver logs into PeopleSoft, a Worklist is ready with the requisitions awaiting approval.</p> <p>NOTE for LSUNO and LSUSH: <i>If an Approver at the campus level has the ability to enter a requisition, his/her requisition will not appear on the Worklist. Unchecking the Hold from Further Processing flag and saving the requisition will change the status of the requisition to Approved.</i></p> <p>NOTE for HCSD: <i>If an Approver at the HCSD level has the ability to enter a requisition, his/her requisitions will not appear in the Worklist. Unchecking the Hold from Further Processing flag and saving the requisition will move the requisition to Purchasing's worklist.</i></p>
2.	<p>Your worklist can be accessed by clicking the worklist link in the top right corner of the page, from the recently used section of Favorites, or by navigating to Worklist, Worklist from the Main Menu.</p>



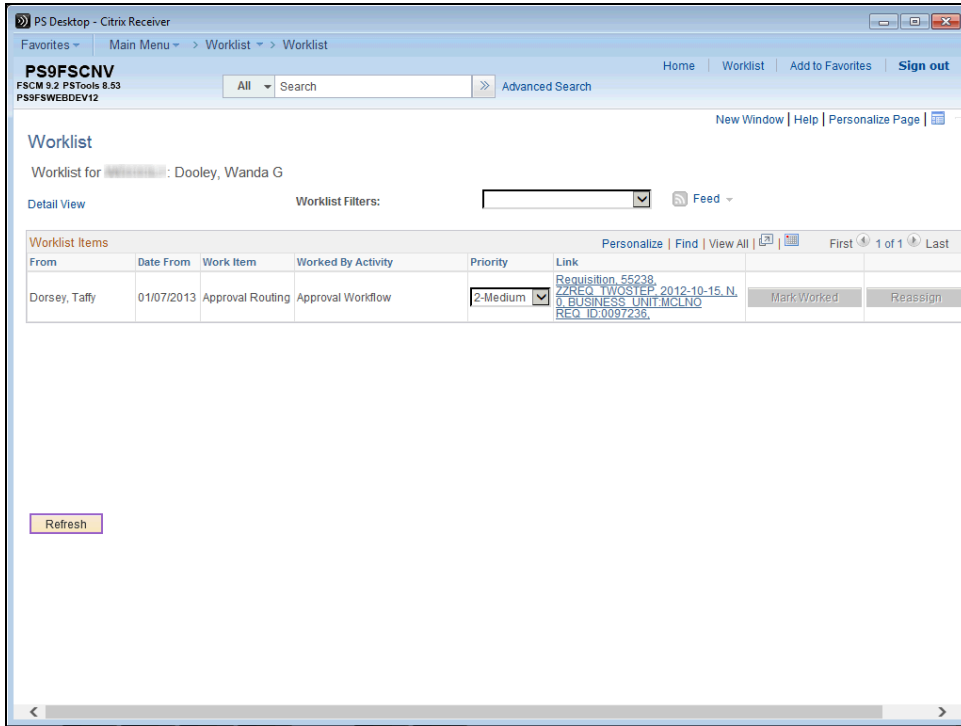
Step	Action
3.	Click the Worklist link. 



Step	Action
4.	<p>The Worklist displays the Requisitions waiting for approval. The Worklist does not include all requisitions for the Approver's Business Unit.</p> <p>The Worklist will include all Requisitions coded to the department(s) for which the Approver is set up to approve, both as a primary Approver and as a secondary (i.e. backup) Approver. Therefore, requisitions from multiple Departments (Cost Centers) may appear on an Approver's Worklist if he/she is set up to approve for more than one department.</p> <p><i>NOTE: When working in the Production database, requisitions from other Business Units will not appear on your Worklist, as depicted here.</i></p>
5.	Additional columns can be viewed by clicking the Detail View link. However, neither the Detail View nor the Work List Filters should be used by end-users.

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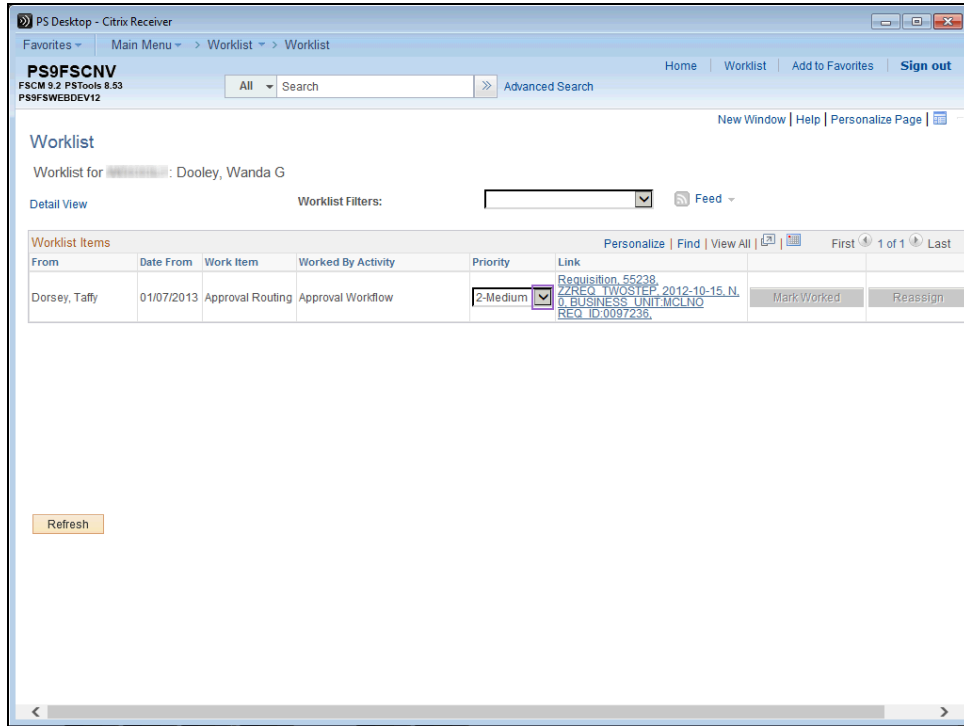
Approving_Requisitions_9_2


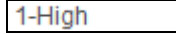


Step	Action
6.	<p>The Refresh button, located at the bottom of the list on the left side of the page will move requisitions that are ready for approval to the Worklist.</p> <p><i>NOTE: You may wish to click the Refresh button before exiting the Worklist to determine if any other requisitions are ready for approval and display on your Worklist.</i></p>

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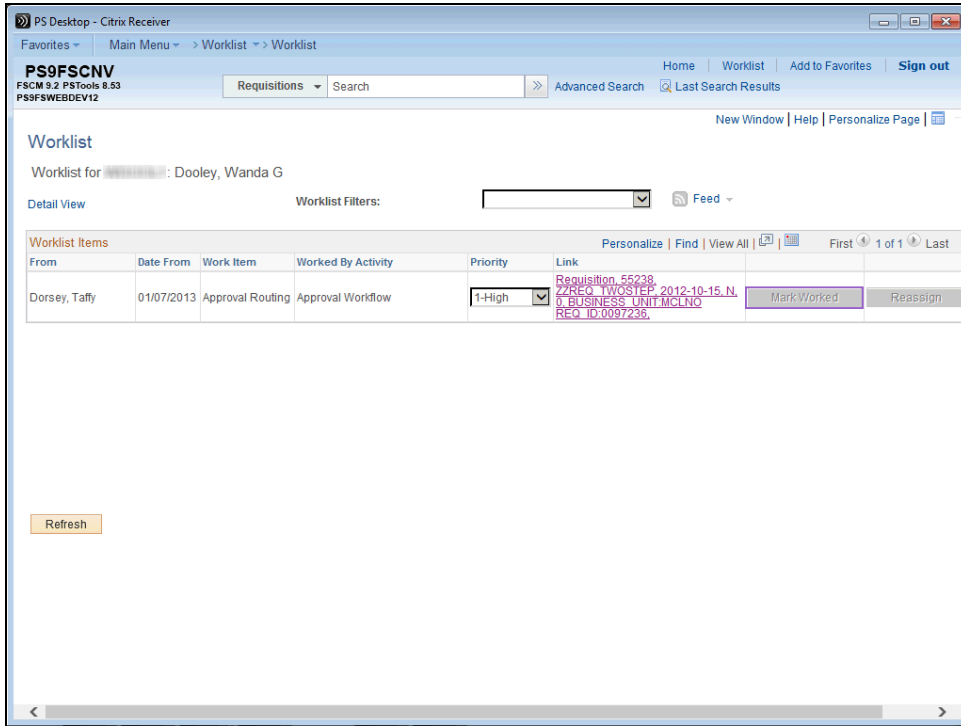
Approving_Requisitions_9_2

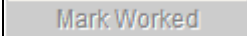


Step	Action
7.	<p>Requisitions <u>do not</u> have to be approved in any particular order. However, you may click the Priority drop-down arrow next to the requisition links to make a notation of the priority order in which you wish to approve the requisitions on your Worklist.</p> <p><i>NOTE: This <u>does not</u> reorder the requisitions on the Worklist.</i></p> <p>Click the button to the right of the Priority field.</p> 
8.	<p>Click the High list item.</p> 
9.	<p>The Link column displays link information in the following order:</p> <p>Sequencing Information, Number of Approval Levels, Business Unit, and Requisition ID.</p>

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Step	Action
10.	<p>If a requisition is approved by another user, or an approver entered the requisition, an entry may display in your worklist indicating the requisition is already approved.</p> <p>Click the Mark Worked button to remove it from your worklist.</p> <p></p>
11.	The Reassign button may not be used.
12.	This completes <i>Opening Your Worklist</i> . End of Procedure.

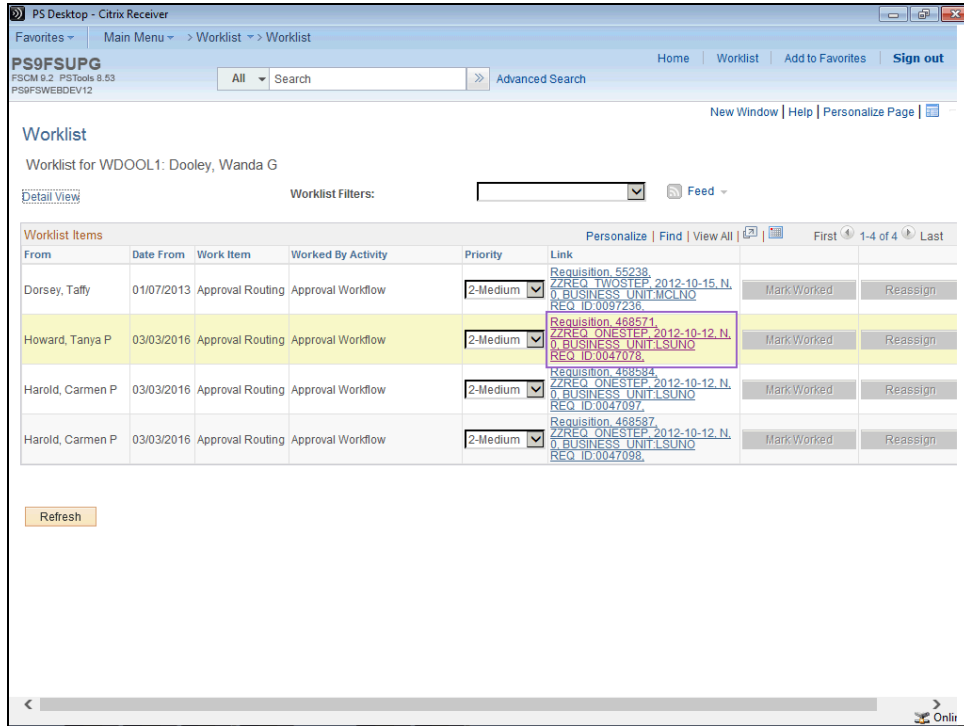
Approve a Requisition

Procedure

In this topic you will learn how to **Approve a Requisition**.

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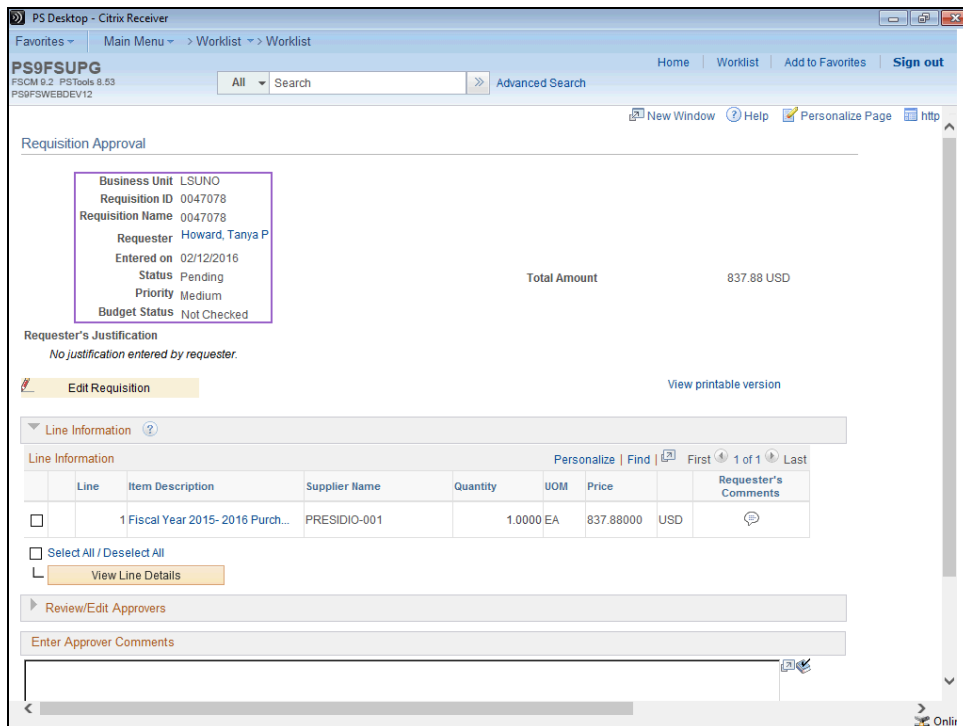
Approving_Requisitions_9_2



Step	Action
1.	<p>Click the link for the requisition you wish to approve.</p> <p>In this example, Req ID 0047078 will be used.</p> <div style="border: 1px solid black; padding: 2px;"> <p>Requisition, 468571, ZZREQ, ONESTEP, 2012-10-12, N, 0, BUSINESS UNIT:LSUNO REQ_ID:0047078.</p> </div>

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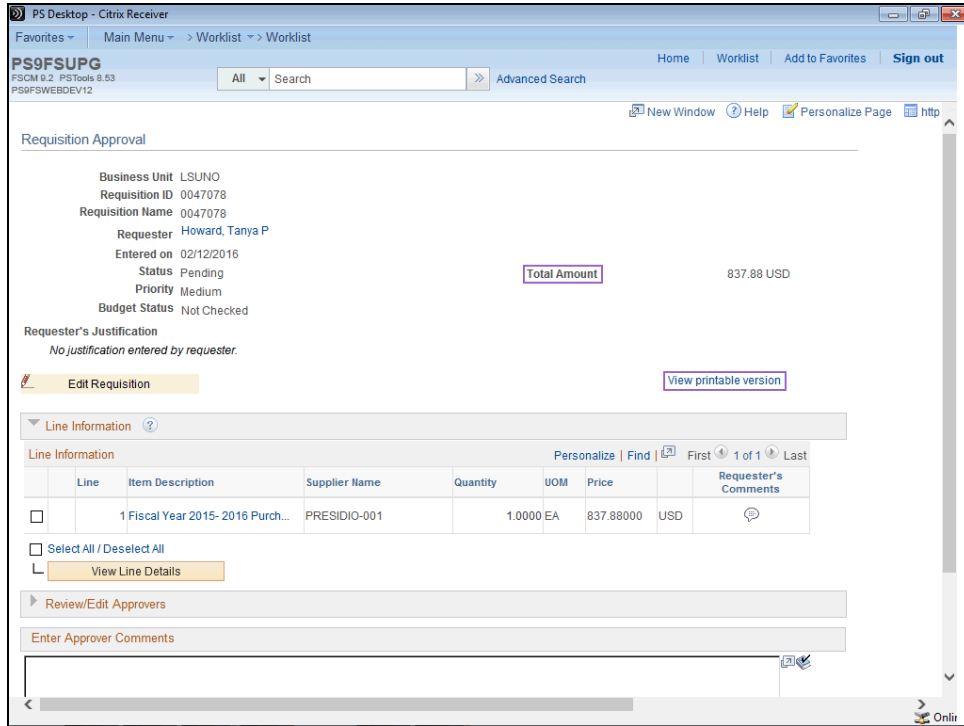
Approving_Requisitions_9_2



Step	Action
2.	<p>Requisition Approval Fields, Buttons and Links</p> <p>Business Unit - the requisition Business Unit; Requisition ID - the Requisition ID for the requisition; Requisition Name - the description of the items requested or the requisition id number; Requester - the person who entered the requisition; Entered On - the date the requisition was entered into the system; Status - the status of the requisition; Priority - the approval priority of the requisition; Budget Status - the budget check status of the requisition; Edit Requisition - a link to the requisition header;</p>

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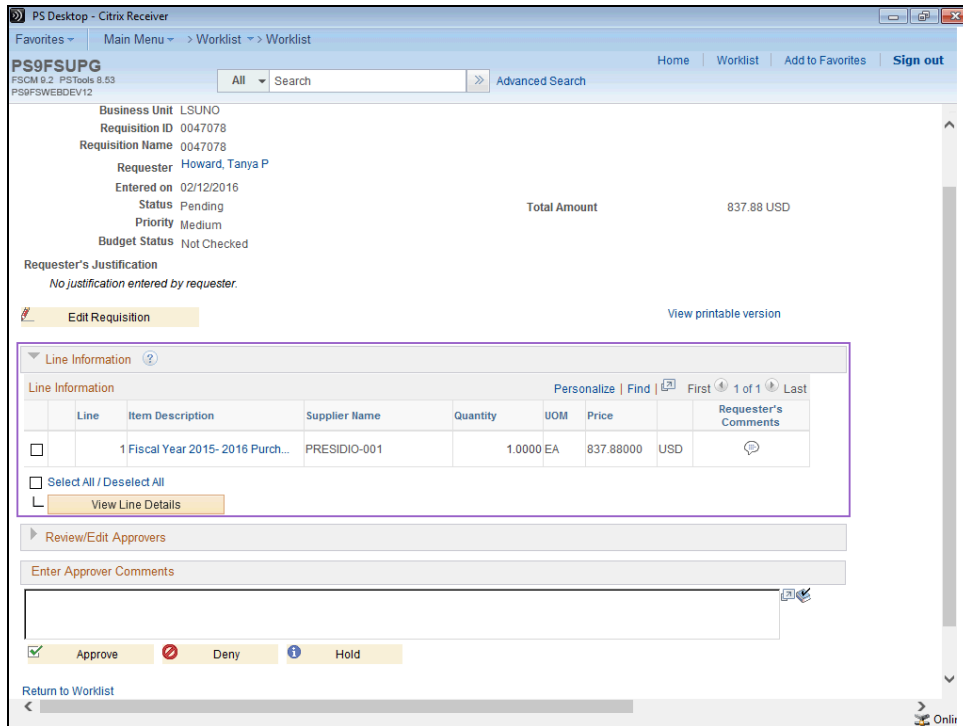
Approving_Requisitions_9_2



Step	Action
3.	<p>Requisition Approval Fields, Buttons and Links (continued)</p> <p>Total Amount - the total amount of the requisition;</p> <p>View Printable Version - cannot be used. You must print requisitions from the Report Manager. See the Uncheck Hold from Further Processing and Print a Requisition topic in the Managing Requisitions manual for detailed instructions on how to print a requisition from the Report Manager.</p>

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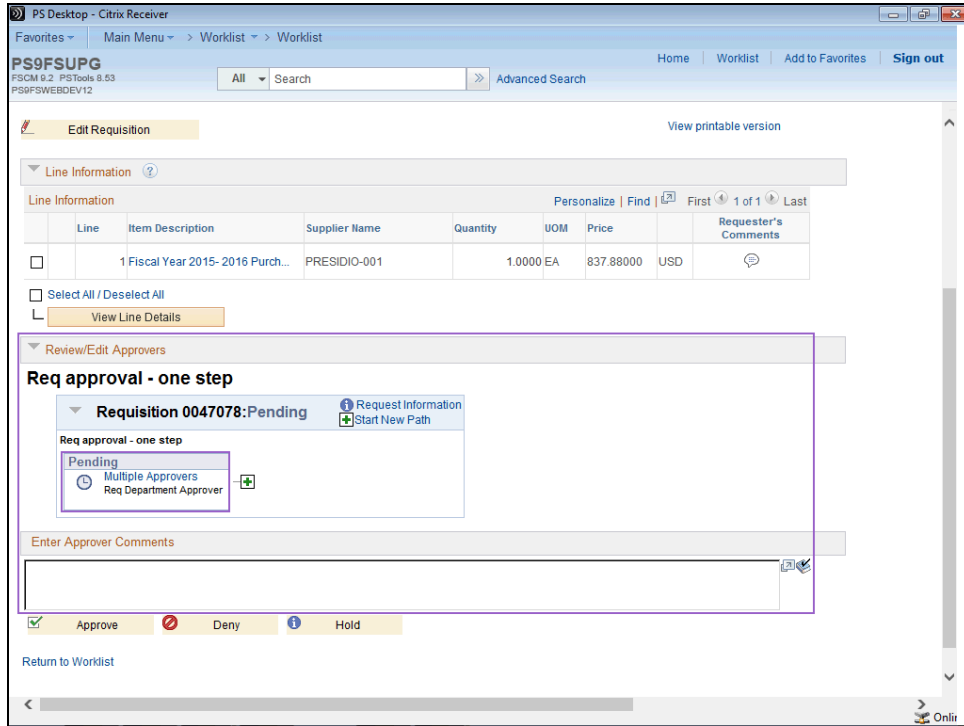
Approving_Requisitions_9_2



Step	Action
4.	<p>Requisition Approval Fields, Buttons and Links (continued)</p> <p>Line Information - requisition line number, item description, vendor name, quantity ordered, UOM (unit of measure), and price; View Line Details - contains all the information outlined above with the addition of chartfield information.</p>

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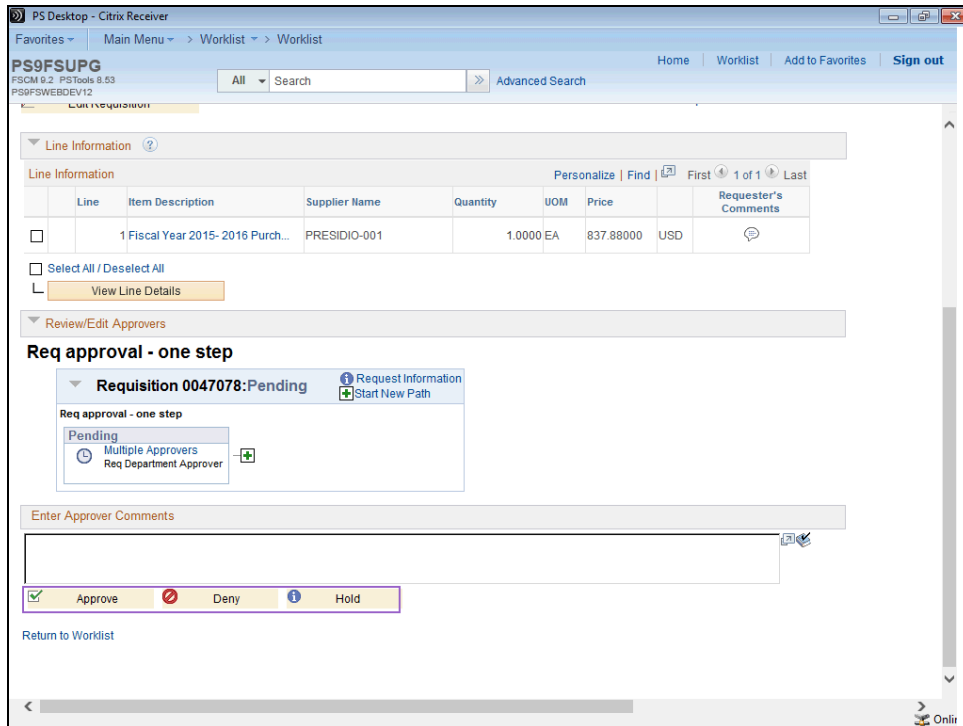
Approving_Requisitions_9_2



Step	Action
5.	<p>Requisition Approval Fields, Buttons and Links (continued)</p> <p>Review/Edit Approver - displays the number of approval steps and provides a link to view a list of users who are eligible to approve this requisition;</p> <p>Enter Approver Comments - approvers may enter comments regarding the requisition. Comments must be added whenever a requisition is denied or put on hold.</p>

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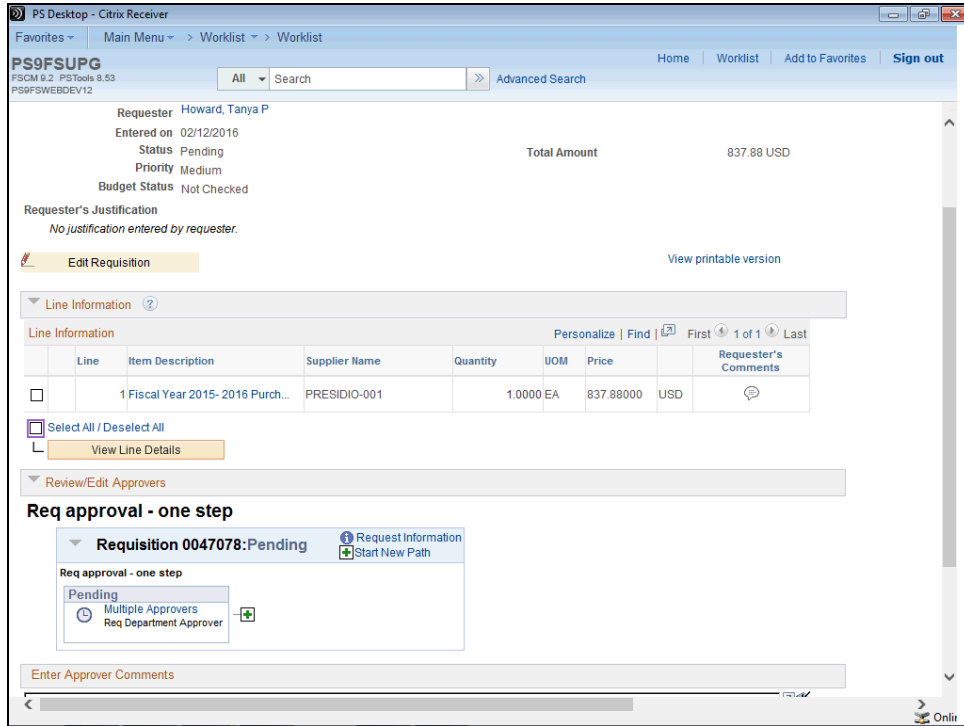
Approving_Requisitions_9_2



Step	Action
6.	<p>Requisition Approval Fields, Buttons and Links (continued)</p> <p>Approve, Deny and Hold - used to select an action to be taken on the requisition.</p>
7.	<p>You can view line details for a single line or for all lines at once.</p> <p>To view a single line, click the checkbox to the left of the line number.</p> <p>To view all lines, click the checkbox to the left of the Select All/Deselect All link.</p>

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Step	Action
8.	Click the Select All / Deselect All option. <input type="checkbox"/>
9.	Click the View Line Details button. <input type="button" value="View Line Details"/>

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Business Unit: LSUNO **Requisition:** 0047078 **Requester:** THOWAR3
Requested By: Howard, Tanya P **Status:** Pending Approval
Entered Date: 2/12/16 **Currency:** USD
Requisition Name: 0047078 **Requisition Total:** 837.88

Line: 1 **Item Description:** Fiscal Year 2015-2016 Purchase Order renewal of maintenance for the following: **Quantity:** 1.0000 **UOM:** EA **Price:** 837.88 **Line Total:** 837.88
Line Status: Pending


Line Comments:
October 30, 2016 - July 1, 2017
Serial# 001606046148
PAN-PA-200-TP-R Threat prevention subscription renewal, PA-200; Qty 1 @ \$204.48
PAN-PA-200-URLA-R PANDB URL filtering subscription renewal, PA-200; Qty 1 @ \$204.48
PAN-PA-200-WF-R Wildlife subscription renewal, PA-200; Qty 1 @ \$204.48
October 18, 2016 - July 1, 2017
Serial# 001606046148
PAN-SVC-PREM-200-R Premium support renewal, PA-100; Qty 1 @ \$224.44
LY POW 00377118
Children's Hospital
488-15-9531 - 100%

Ship Line: 1 **Ship To:** 1324000 **Address:** 433 Bolivar St
Attention: Howard, Tanya P **Due Date:** 2/12/16 **New Orleans LA 70112**
United States **Shipping Quantity:** 1.0000
Shipping Total: 837.88

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	LSUNO	1.0000	100.00	837.88	LSUNO	534555

Dept	Fund	Program	Class
1673000	113	54000	90110

Open QTY **PC BU** **Project** **Activity** **Open Amt**

Step	Action
10.	Click the Close button. 

Business Unit: LSUNO **Requisition ID:** 0047078
Requisition Name: 0047078 **Requester:** Howard, Tanya P
Entered on: 02/12/2016 **Status:** Pending **Total Amount:** 837.88 USD
Priority: Medium **Budget Status:** Not Checked

Requester's Justification:
No justification entered by requester.

[Edit Requisition](#) [View printable version](#)

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments
<input checked="" type="checkbox"/>	1 Fiscal Year 2015-2016 Purch...	PRESIDIO-001	1.0000	EA	837.88000	USD


Select All / Deselect All
[View Line Details](#)

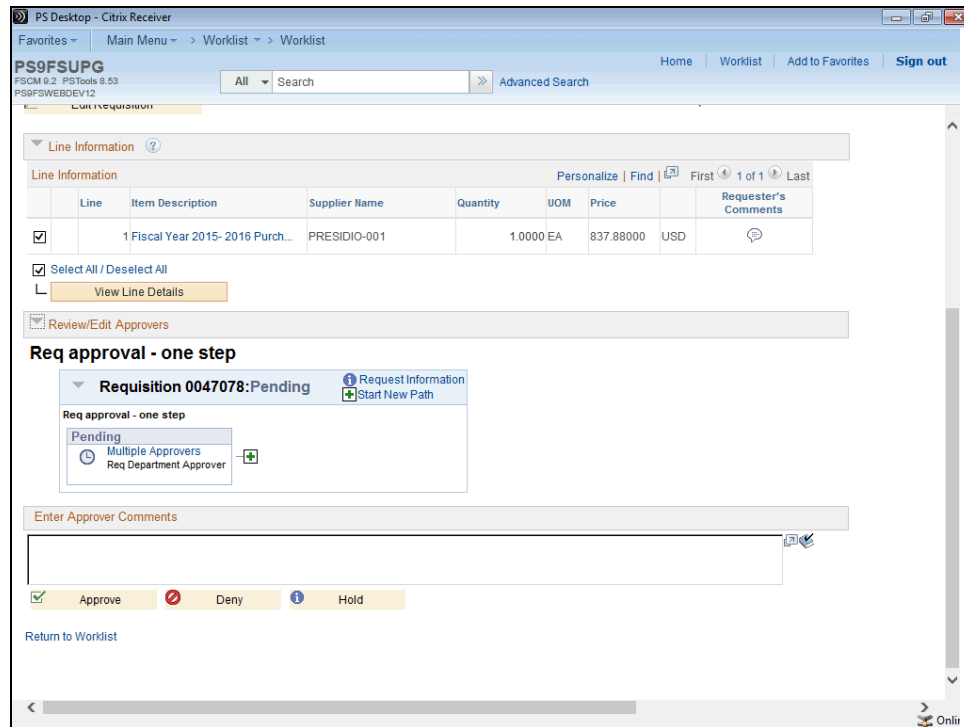
[Review/Edit Approvers](#)

Enter Approver Comments

Approve **Deny** **Hold**

[Return to Worklist](#)

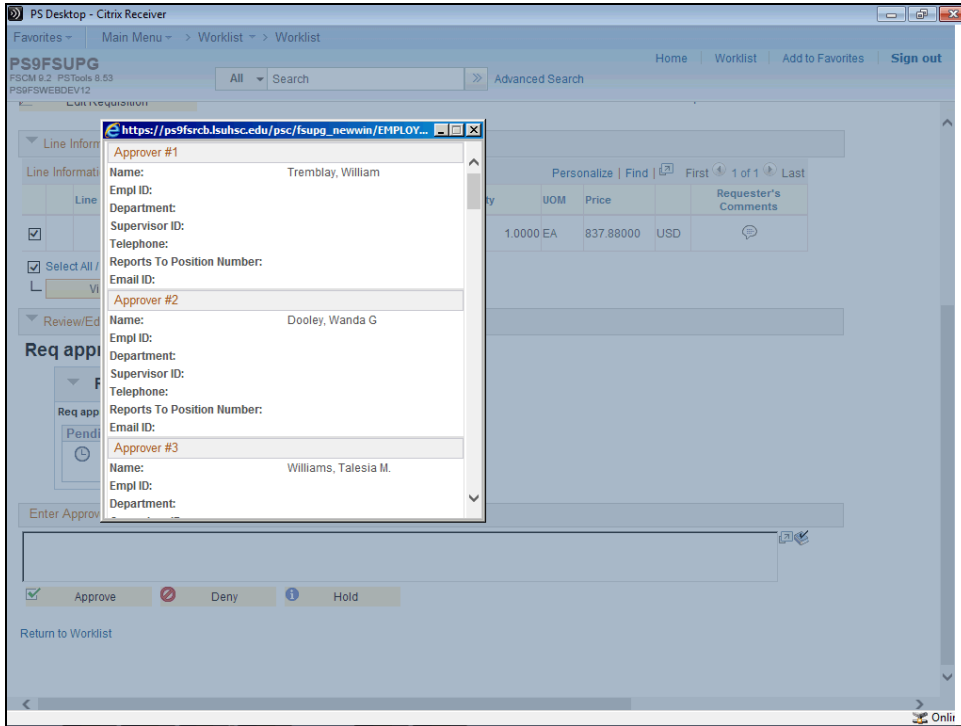
Step	Action
11.	Click the Expand section button to view the Review/Edit Approvers section. 




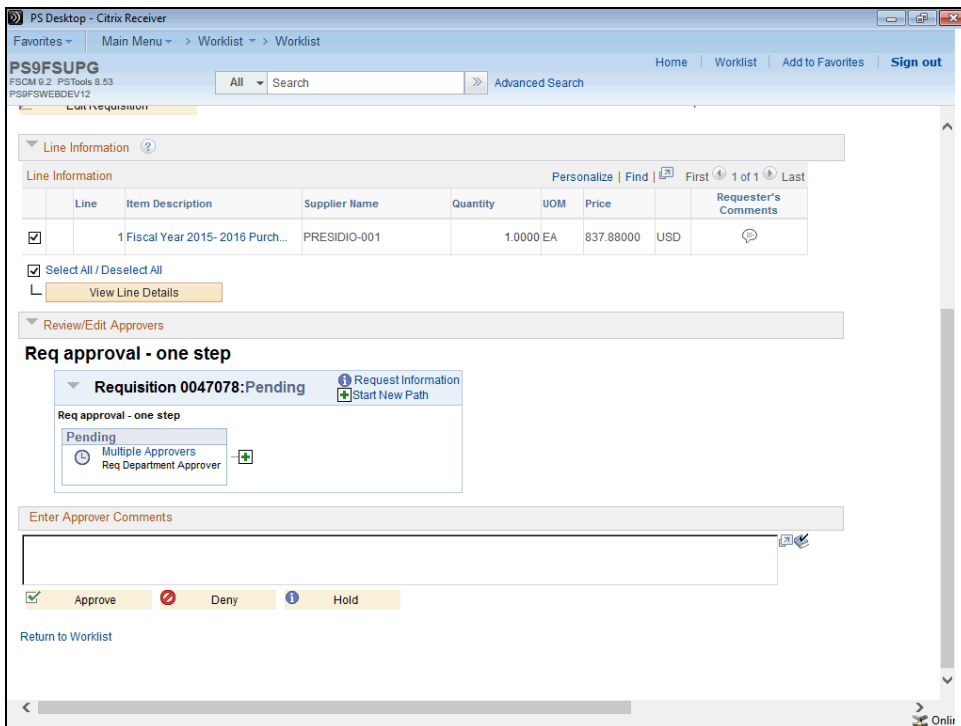
Step	Action
12.	Click the Multiple Approvers link to view the list of users who can approve the requisition. Multiple Approvers


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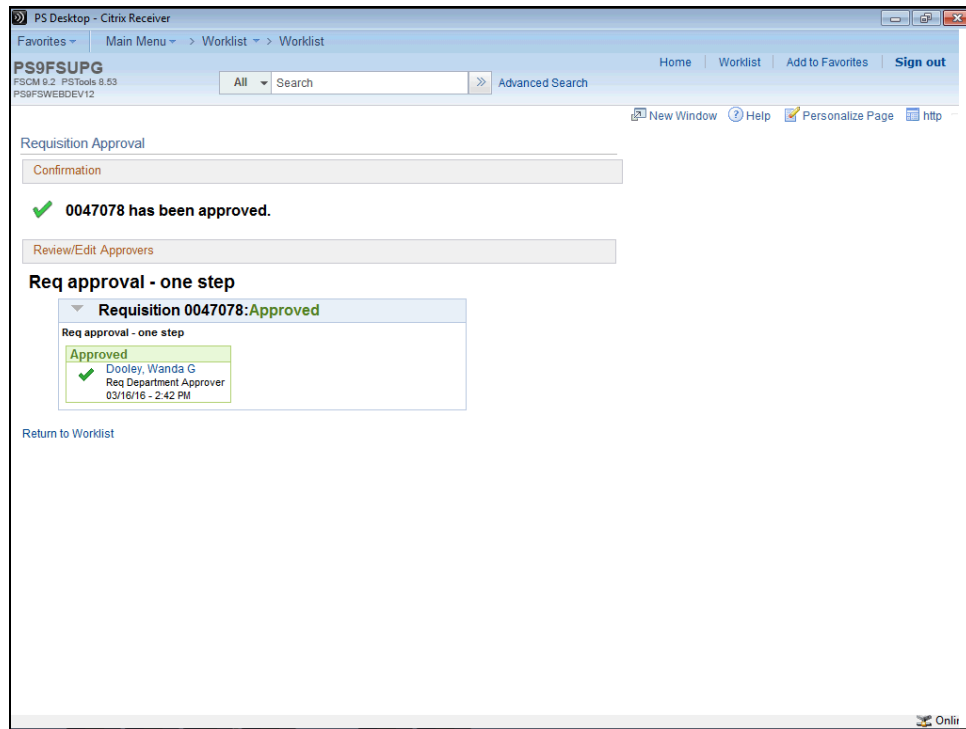
Approving_Requisitions_9_2



Step	Action
13.	Click the Close button. 



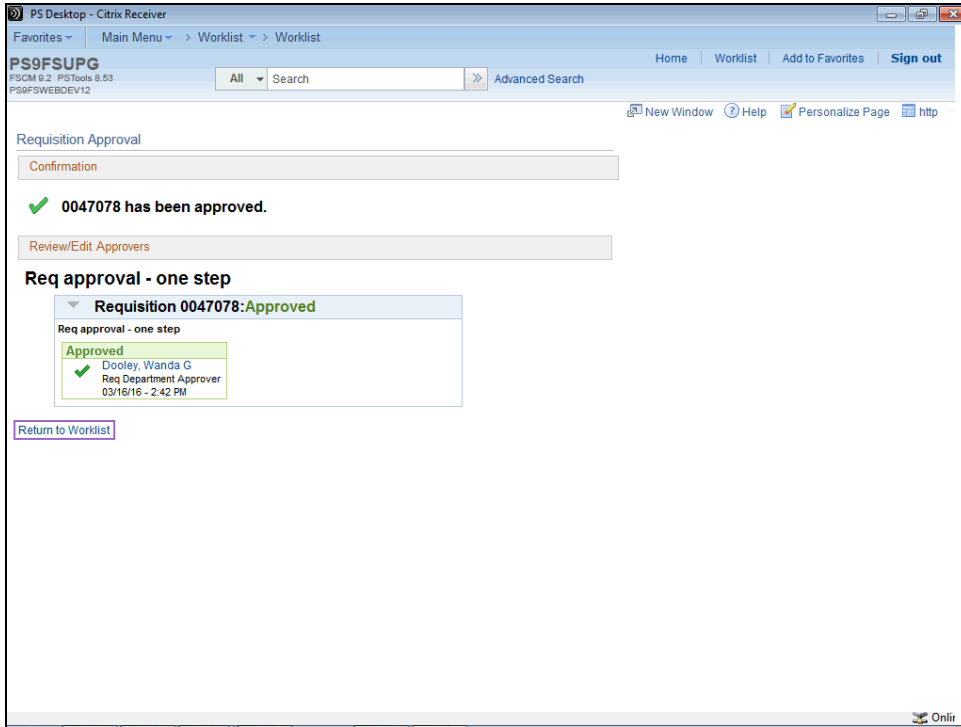
Step	Action
14.	<p>In this example, you have determined the requisition will be approved.</p> <p>Click the Approve button.</p> 



Step	Action
15.	You will receive a message stating the requisition has been approved. The system automatically saves the requisition once it is approved.
16.	<p><i>NOTE: HCSD Business Units use a two-step approval process. The requisition is first approved by a department approver and then by Purchasing.</i></p> <p>A HCSD facility is used as the Business Unit for this example. A department approver has approved the requisition. The status of the requisition will not change to Approved until someone in Purchasing approves the requisition. A message displays stating the requisition will be routed to the next level for approval.</p>
17.	<i>NOTE: You may click the Multiple Approvers link to view the list of users who can approve the requisition.</i>
18.	<i>NOTE: LSUNA, LSUNO and LSUSH use a one-step approval process. Once the department approver approves the requisition, the status changes to Approved as shown in this example and the requisition will be routed to Purchasing for sourcing.</i>

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Step	Action
19.	Click the Return to Worklist link to return to your worklist and select another requisition from the list. Return to Worklist
20.	Once the requisition has been approved and saved, it should be removed from the worklist and routed appropriately. In this example, the requisition you approved (Req ID 0047078) was the second option and it no longer displays in the worklist. <i>NOTE: When the requisition is approved, an entry will be made in the requester's worklist to indicate the requisition has been approved. The requester should click the Mark Worked button to remove the entry from their worklist.</i>
21.	This completes <i>Approve a Requisition</i> . End of Procedure.

Deny a Requisition

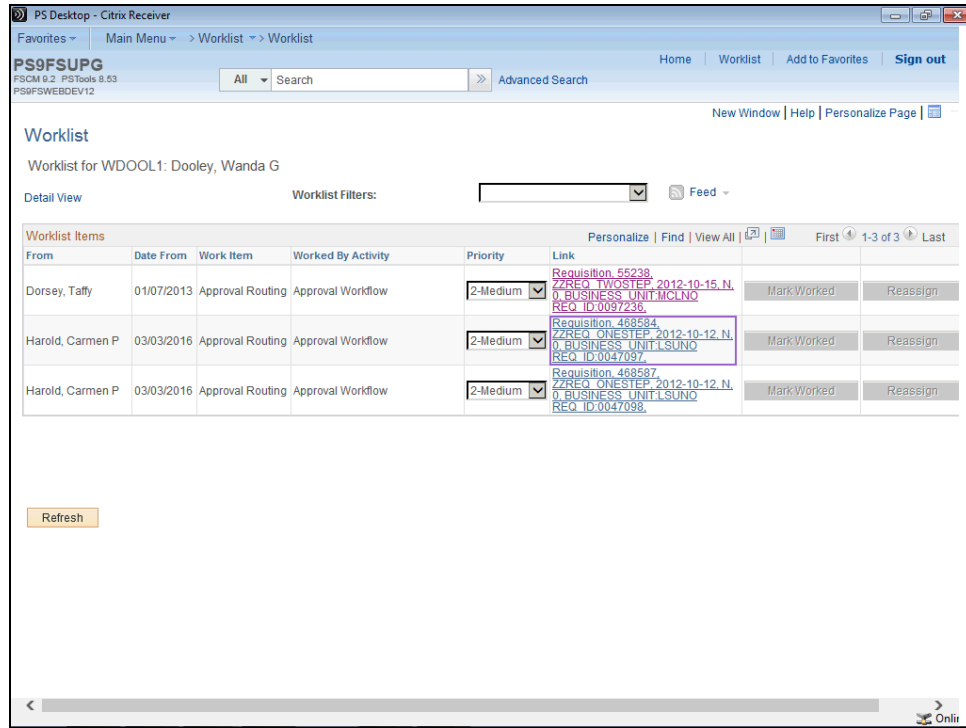
Procedure

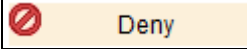
In this topic you will learn how to **Deny a Requisition**.

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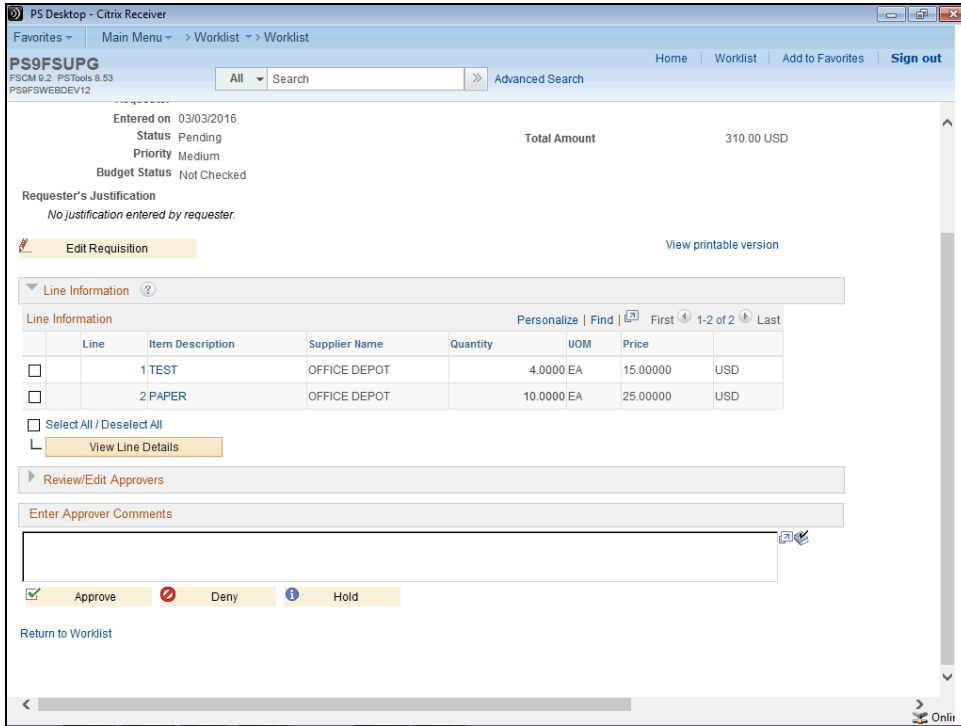
Step	Action
1.	There are many reasons a requisition may be denied including that the items are no longer needed. If you determine the items are needed you can modify the denied requisition and it will route back to the worklist for approval.




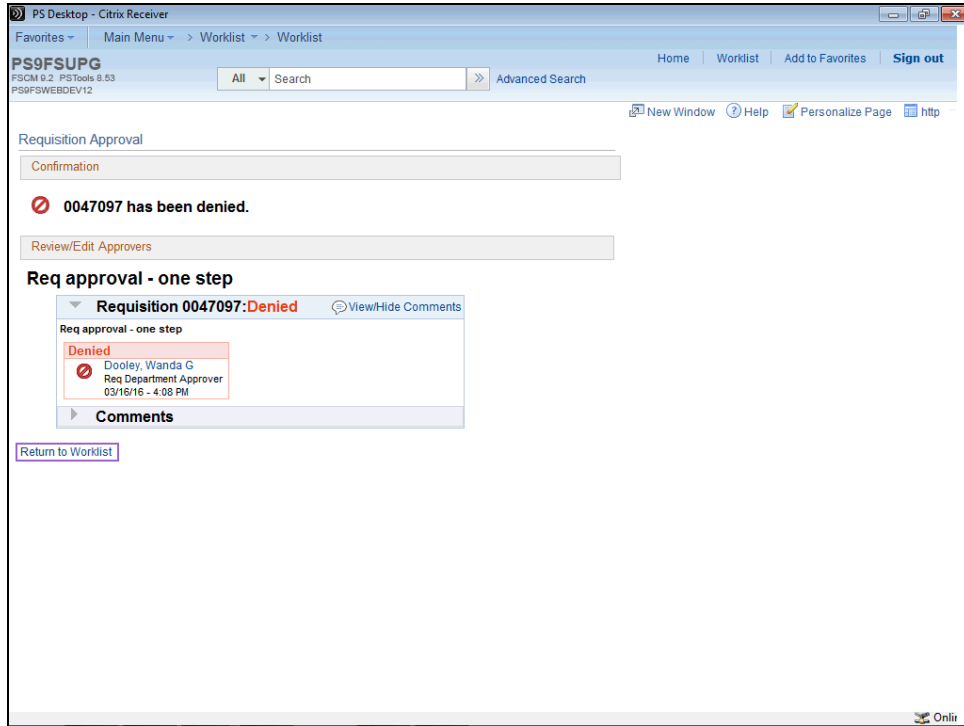
Step	Action
2.	<p>Click the link for the requisition you wish to deny.</p> <p>In this example, Req ID 0047097 will be used.</p> <div style="border: 1px solid black; padding: 2px;"> <p>Requisition 468584, ZZREQ ONESTEP, 2012-10-12, N, 0 BUSINESS UNIT:LSUNO REQ ID:0047097</p> </div>
3.	<p>In this example, you have determined the requisition will be denied because the items are no longer needed.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;">  </div>

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Step	Action
4.	<p>Comments explaining why the requisition is denied will be entered into the Enter Approver Comments section.</p> <p>Enter the desired information into the Enter Approver Comments field. Enter "The requisition is denied because the items are no longer needed".</p>
5.	<p>Click the Deny button.</p>  Deny

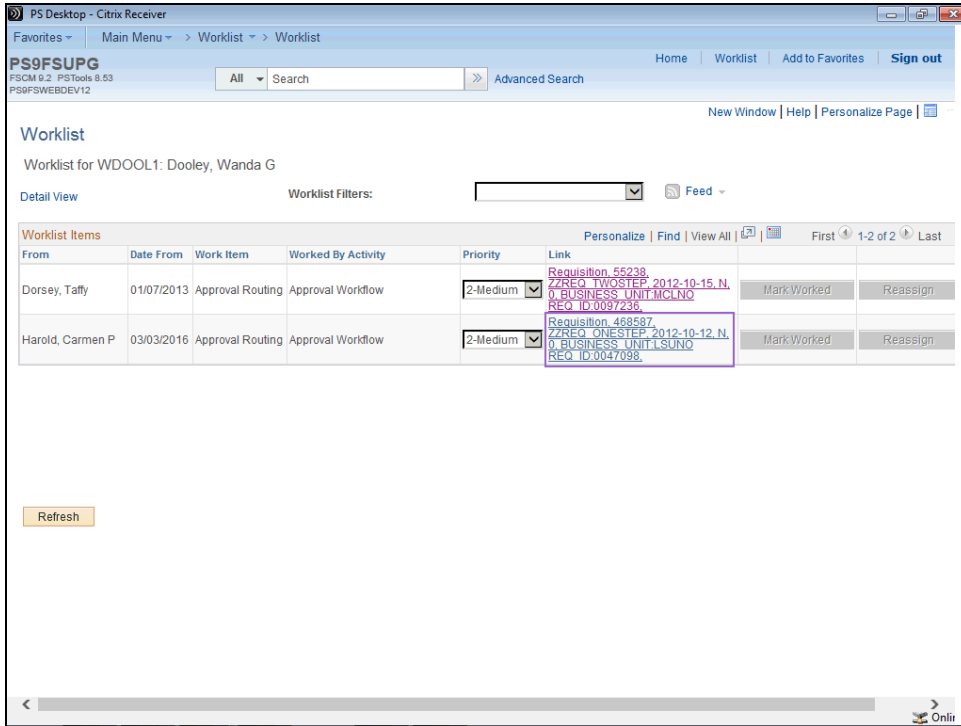


Step	Action
6.	<p>A message displays confirming the requisition has been denied.</p> <p>Click the Return to Worklist link.</p> <p>Return to Worklist</p>
7.	<p>In this example, the requisition you denied (Req ID 0047097) was the second option and it has been removed from the worklist.</p> <p><i>NOTE: Individual requisition lines cannot be selected to deny, you will need to deny the entire requisition. Enter comments explaining why the requisition is denied and if the requisition should be corrected and resubmitted. Budget checking the requisition will resubmit it to the worklist for approval.</i></p> <p><i>NOTE: The requisition can be modified, budget checked, and routed back to the worklist for approval, if desired.</i></p>
8.	<p>This completes <i>Deny a Requisition.</i></p> <p>End of Procedure.</p>

Hold a Requisition Procedure

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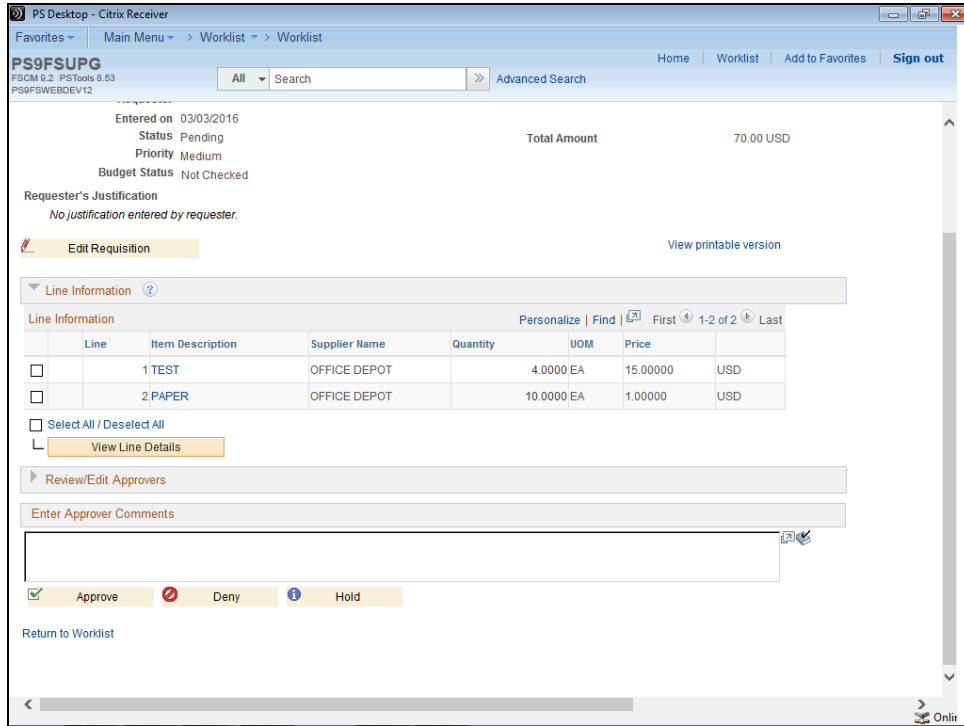
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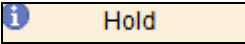


Step	Action
1.	<p>Click the link for the requisition you wish to place on hold.</p> <p>In this example, Req ID 0047098 will be used.</p> <div style="border: 1px solid black; padding: 2px;"> <p>Requisition 468587, ZZREQ ONESTEP, 2012-10-12, N, 0 BUSINESS UNIT:LSUNO REQ ID:0047098</p> </div>

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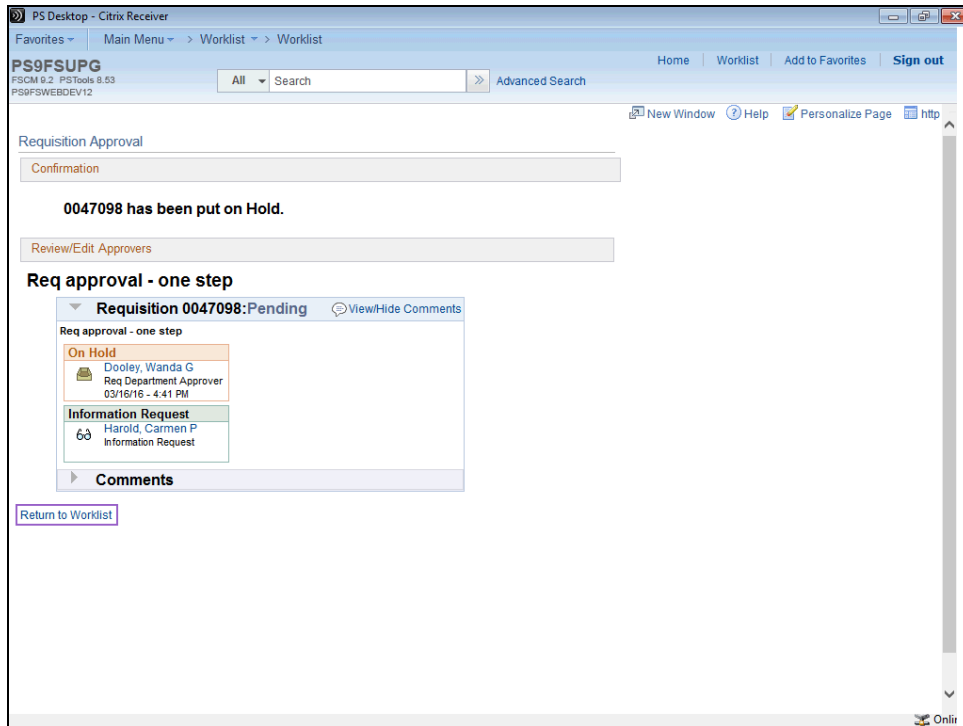
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Step	Action
2.	In this example, you have determined the requisition will be placed on hold so that alternative options can be explored. Enter the desired information into the Enter Approver Comments field. Enter "The requisition is being placed on hold so alternative options can be explored" .
3.	Click the Hold button. 
4.	The requisition approval is On Hold.

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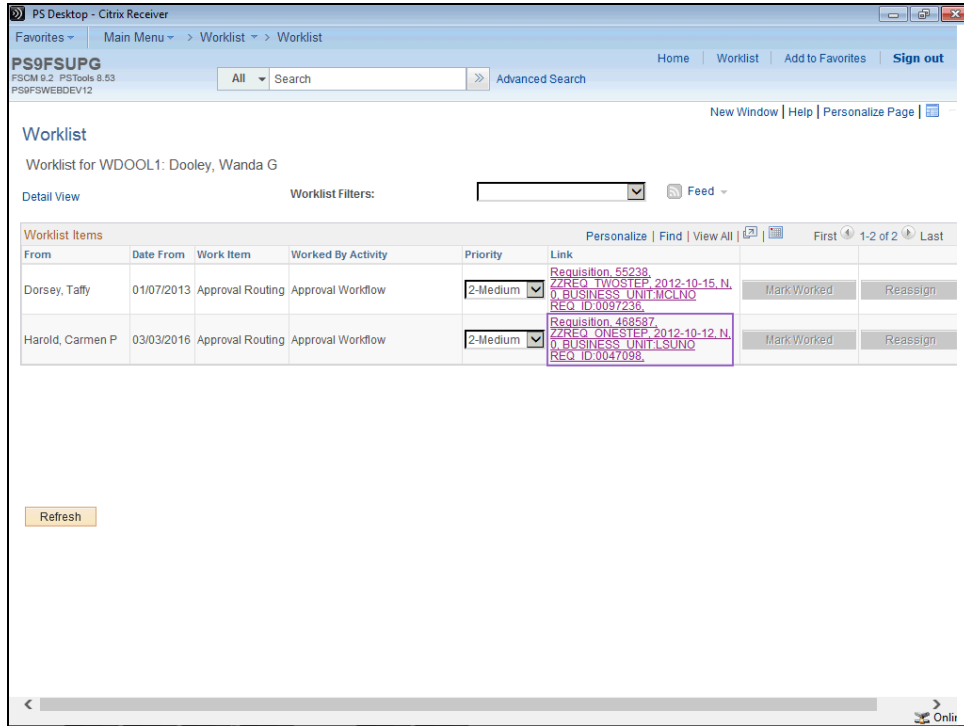
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Step	Action
5.	Click the Return to Worklist link. Return to Worklist
6.	The requisition on hold will remain in your worklist.

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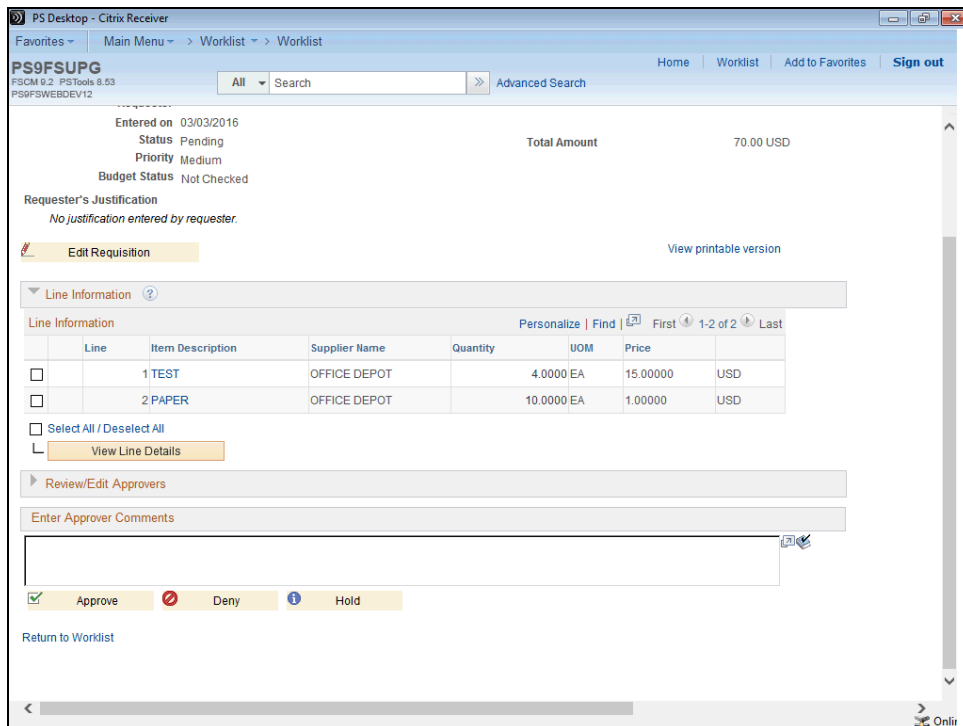
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Step	Action
7.	<p>When you are ready to take action on an On Hold requisition, simply click the link for the requisition you wish to take off hold.</p> <div style="border: 1px solid black; padding: 2px;"> <p>Requisition, 468587, ZZREQ, ONESTEP, 2012-10-12, N, 0, BUSINESS UNIT:LSUNO, REQ ID:0047098,</p> </div>

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Step	Action
8.	Click the Expand section button for the Review/Edit Approvers section to confirm the requisition is on hold. 
9.	Click either the Approve or Deny button to take the requisition off hold and complete the process.
10.	If you wish for the requisition to remain on hold, click the Return to Worklist link.
11.	This completes Hold a Requisition . End of Procedure.