



Managing Approvals for eProcurement Requisitions

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**Training Guide
for eProcurement Requisitions**

Table of Contents

Managing Approvals for eProcurement Requisitions 1
 Approve an ePro Requisition 1
 Deny an ePro Requisition 11
 Hold an ePro Requisition 15

Managing Approvals for eProcurement Requisitions

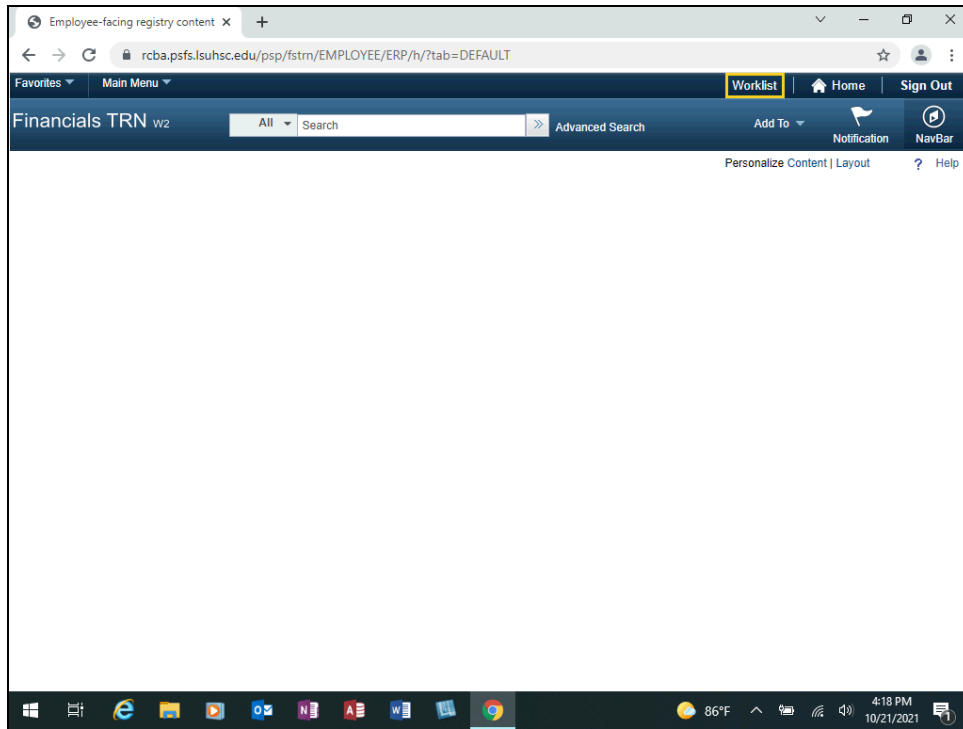
Approve an ePro Requisition


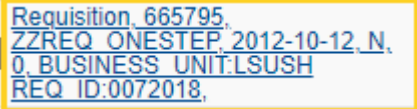
Procedure

In this topic you will learn how to [Approve and ePro Requisitions through the Worklist and eProcurement Menus](#).

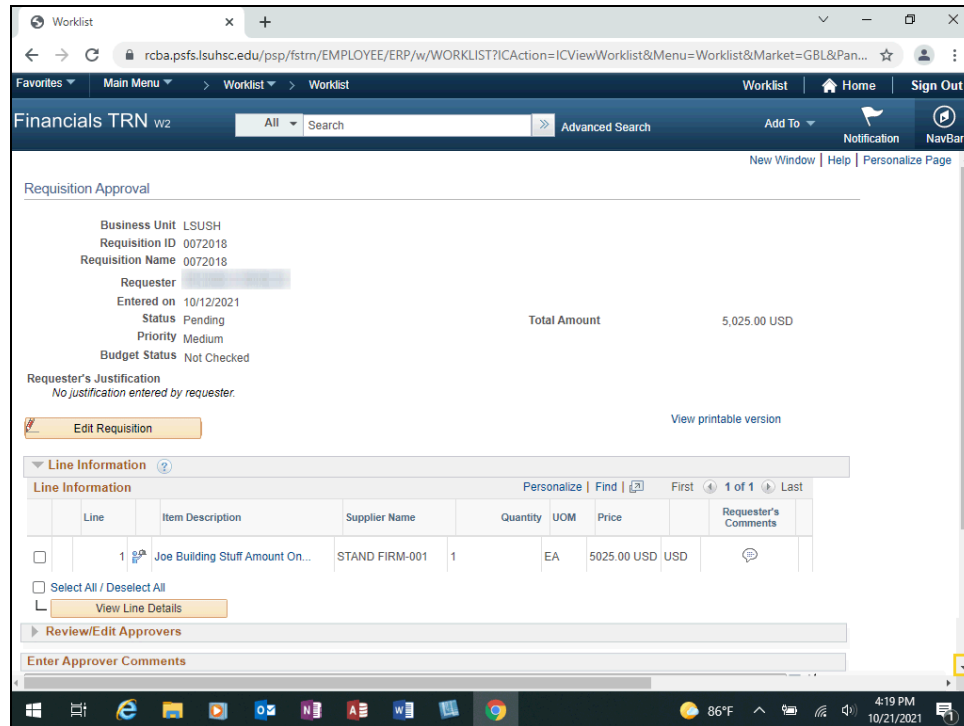
Step	Action
1.	Approve ePro Requisitions through the Worklist
2.	<p>Requisition approvals may be performed via a few methods. This document includes the methods of approving from the Worklist and approving from the Manage Requisition Approvals menu option.</p> <p>Requisition approvers, who are familiar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



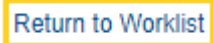
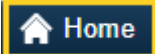
Training Guide for eProcurement Requisitions






Step	Action
3.	<p>After using the launcher to log into PeopleSoft Financials, at the top right of the Classic landing page, select the Worklist link.</p> <p>Click the Worklist button.</p> 
4.	<p>One the Worklist view, select an item in the list for approval.</p> <p>Click the Requisition, 665795, ZZREQ_ONESTEP, 2012-10-12, N, 0, BUSINESS_UNIT:LSUSH REQ_ID:0072018, link.</p> 

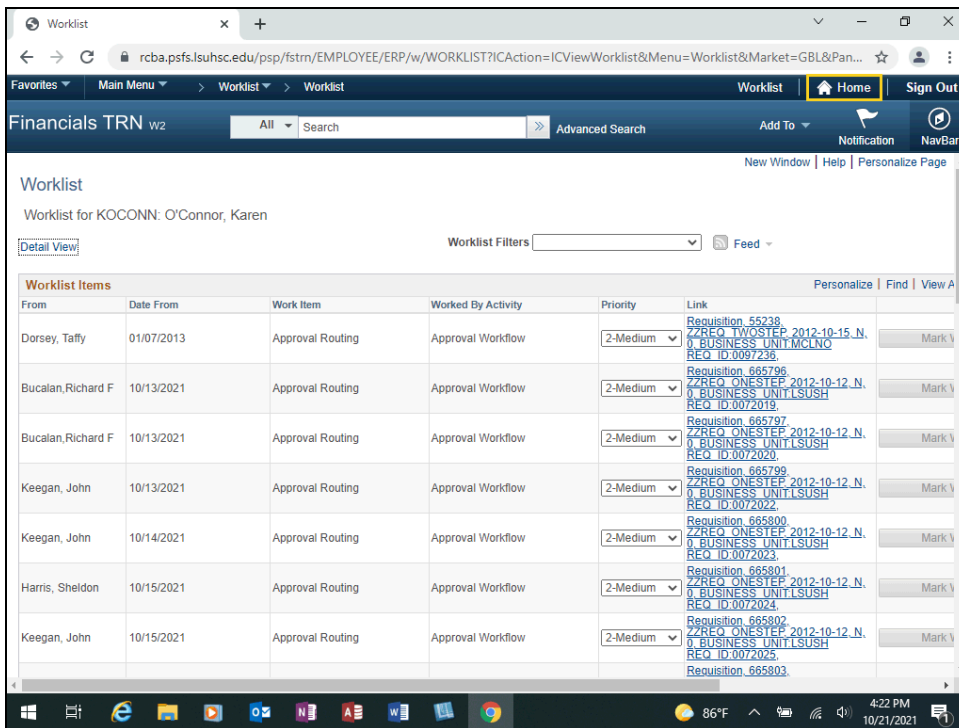
Training Guide for eProcurement Requisitions




Step	Action
5.	<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>Click the Down scrollbar.</p> 
6.	<p>Enter the desired information into the Enter Approver Comments field. Enter "Approving Example".</p>
7.	<p>Click the Approve button.</p> 
8.	<p>Return to the Worklist to view the next item.</p> <p>Click the Return to Worklist button.</p> 
9.	<p>Click the Home button.</p> 




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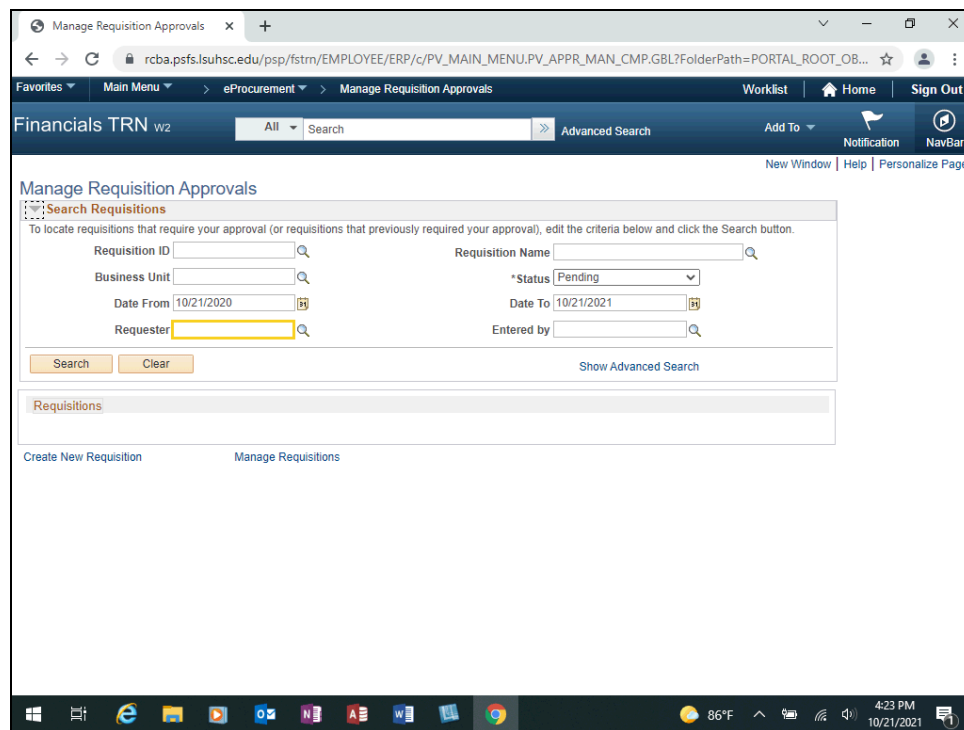
Step	Action
10.	An alternative method to navigate to the Worklist is through the <i>Classic Menu</i> . Click the Main Menu button. 
11.	Click the Worklist menu. 
12.	Click the Worklist menu. 



Step	Action
13.	The Worklist displays. Click the Home button. 
14.	Approve ePro Requisitions through the eProcurement Menus

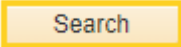
Training Guide for eProcurement Requisitions

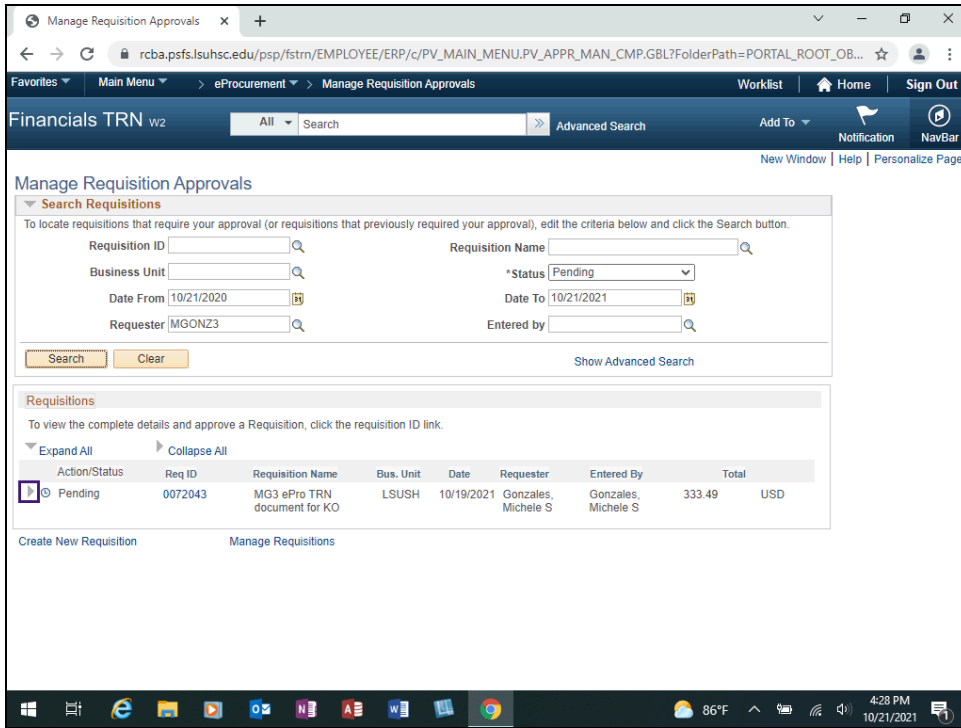
Step	Action
15.	<p>Users may also approve requisitions through the <i>eProcurement</i> menus.</p> <p>Click the Main Menu button.</p> 
16.	<p>Click the eProcurement menu.</p> 
17.	<p>Click the Manage Requisition Approvals menu.</p> 





Step	Action
18.	<p>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 <i>MGONZ3</i>.</p> <p><i>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.</i></p> <p>Enter the desired information into the Requester field. Enter "MGONZ3".</p>

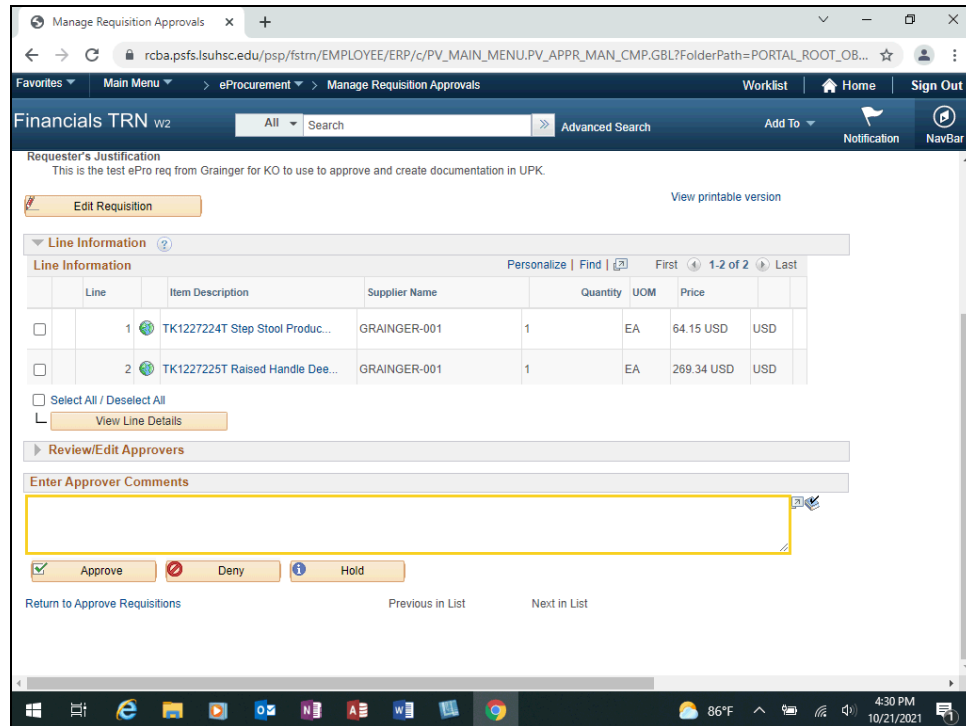
Training Guide for eProcurement Requisitions


Step	Action
19.	Click the Search button. 



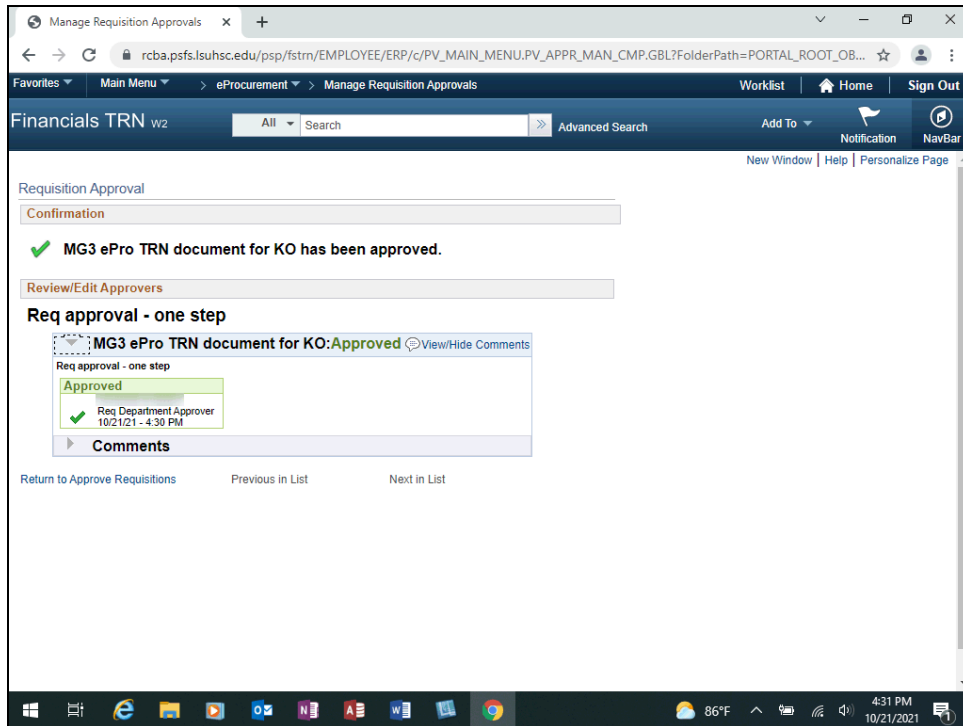
Step	Action
20.	In the search results, each requisition appears as a pending line. To the left of the word "pending" there is an arrow. By selecting the arrow, the requisitions information displays.
21.	To approve the requisition, select the link in the ReqID column for the same requisition. Click the Req ID 0072043 link. 
22.	Click the Down scrollbar. 

Training Guide for eProcurement Requisitions



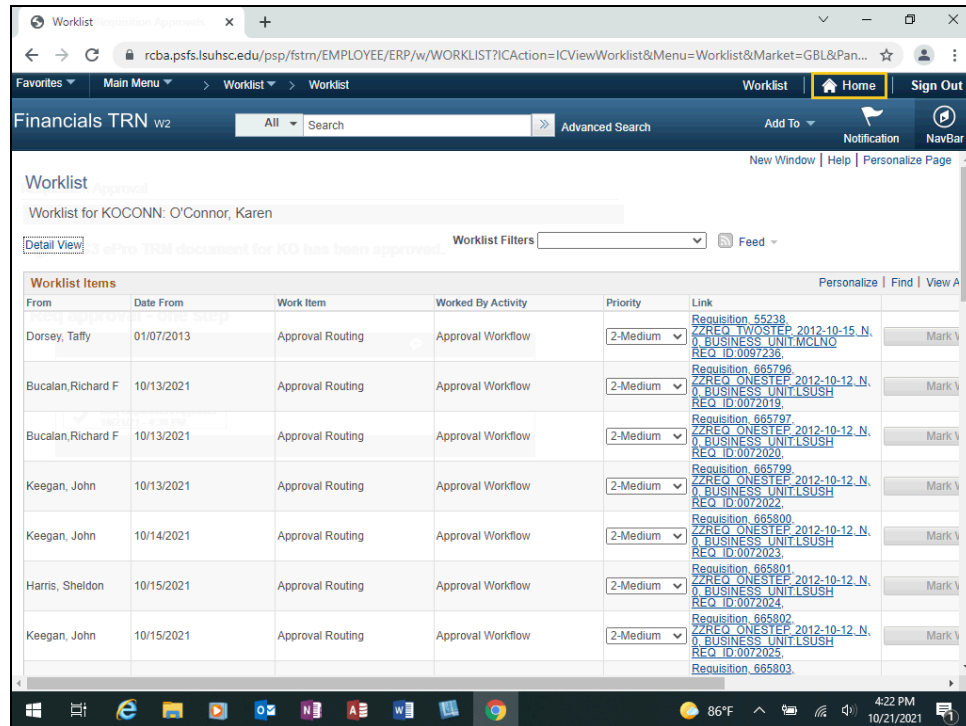
Step	Action
23.	<p>The Approval section displays. If desired, enter comments and click Approve. If no comments are needed, just press Approve.</p> <p>Enter the desired information into the Enter Approver Comments field. Enter "Approving Example".</p>
24.	<p>Click the Approve button.</p> 

Training Guide 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> .

Training Guide for eProcurement Requisitions



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

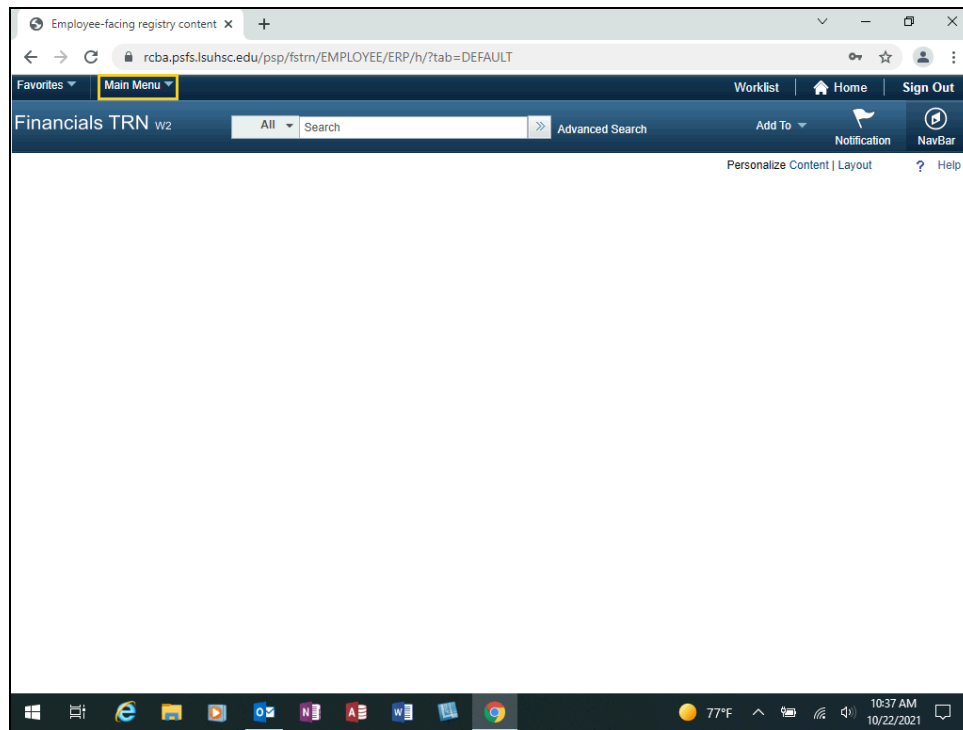
Training Guide
for eProcurement Requisitions




Deny an ePro Requisition

Procedure

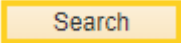
In this topic you will learn how to **Deny an ePro Requisition**.

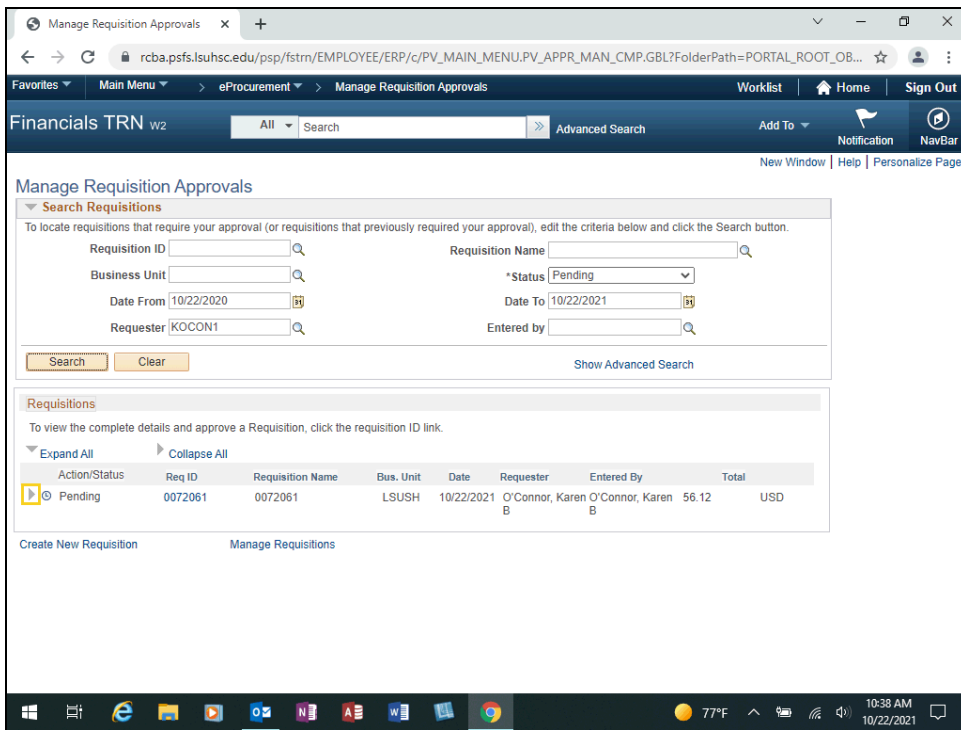
Step	Action
1.	The purpose of this exercise is to demonstrate the approver's ability to Deny a requisition and what occurs to the requisition.





Step	Action
2.	Click the Main Menu button. 
3.	Click the eProcurement menu. 
4.	Click the Manage Requisition Approvals menu. 



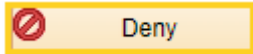
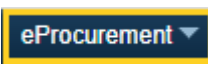
Training Guide for eProcurement Requisitions

Step	Action
5.	<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 KOCON1.</p> <p><i>NOTE: Requester must be entered in ALL CAPS.</i></p> <p>Enter the desired information into the Requester field. Enter "KOCON1".</p>
6.	<p>Click the Search button.</p> 

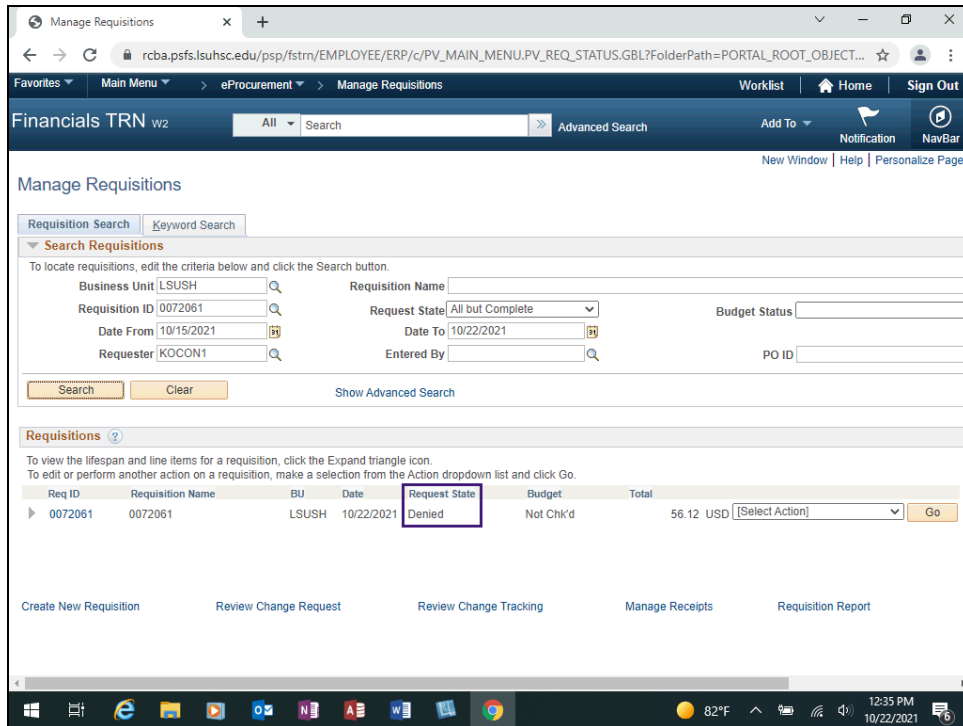


Step	Action
7.	<p>Click the arrow next to the requisition to view the details.</p> <p>Click the Expand Section button.</p> 
8.	<p>Click the Down scrollbar.</p> 

Training Guide for eProcurement Requisitions

Step	Action
9.	<p>As the manager, you realize that these items have already been ordered and you want to deny the requisition.</p> <p>Click the Req ID 0072061 link.</p> 
10.	<p>Click the Down scrollbar.</p> 
11.	<p>Enter comments as to why you are denying the requisition.</p> <p>Enter the desired information into the Enter Approver Comments field. Enter "Denied - Duplicate order".</p>
12.	<p>Click the Deny button.</p> 
13.	<p>The requisition status is denied. You may verify this by navigating to: Main Menu > eProcurement > Manage Requisitions.</p> <p>Click the eProcurement button.</p> 
14.	<p>Click the Manager Requisitions link.</p> 
15.	<p>Enter the desired information into the Requisition ID field. Enter "0072061".</p>
16.	<p>Enter the desired information into the Requester field. Enter "KOCON1".</p> <p><i>NOTE: Requester must be entered in ALL CAPS.</i></p>
17.	<p>Click the Search button.</p> 

Training Guide for eProcurement Requisitions



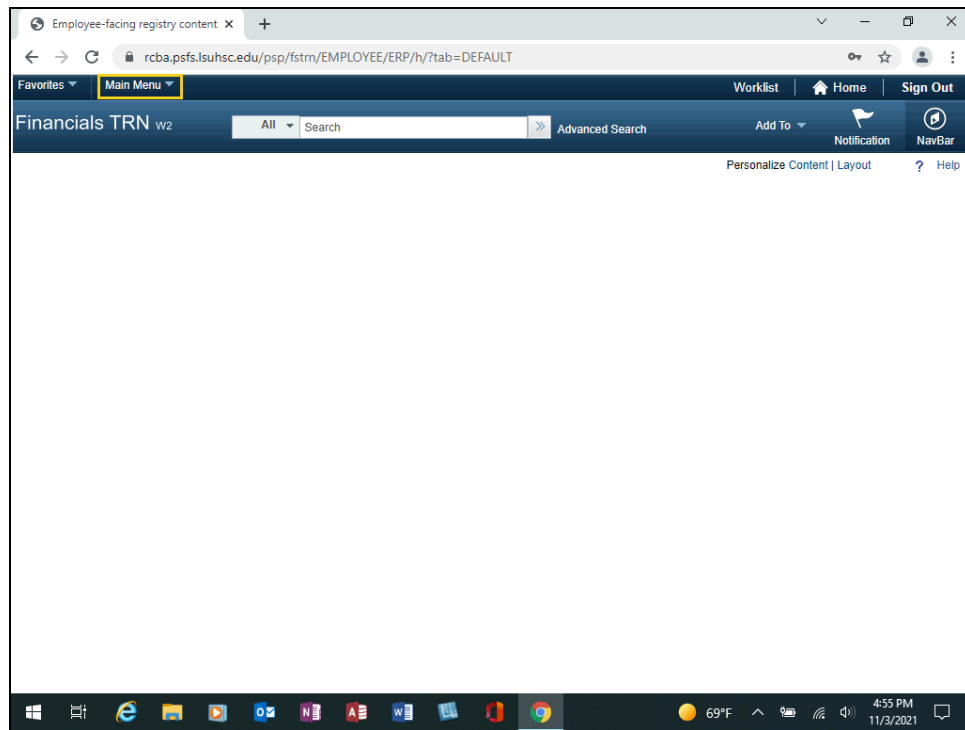
Step	Action
18.	The requisition information displays with a Request Status of Denied .
19.	This completes <i>Deny an ePro Requisition</i> . End of Procedure.




Hold an ePro Requisition

Procedure

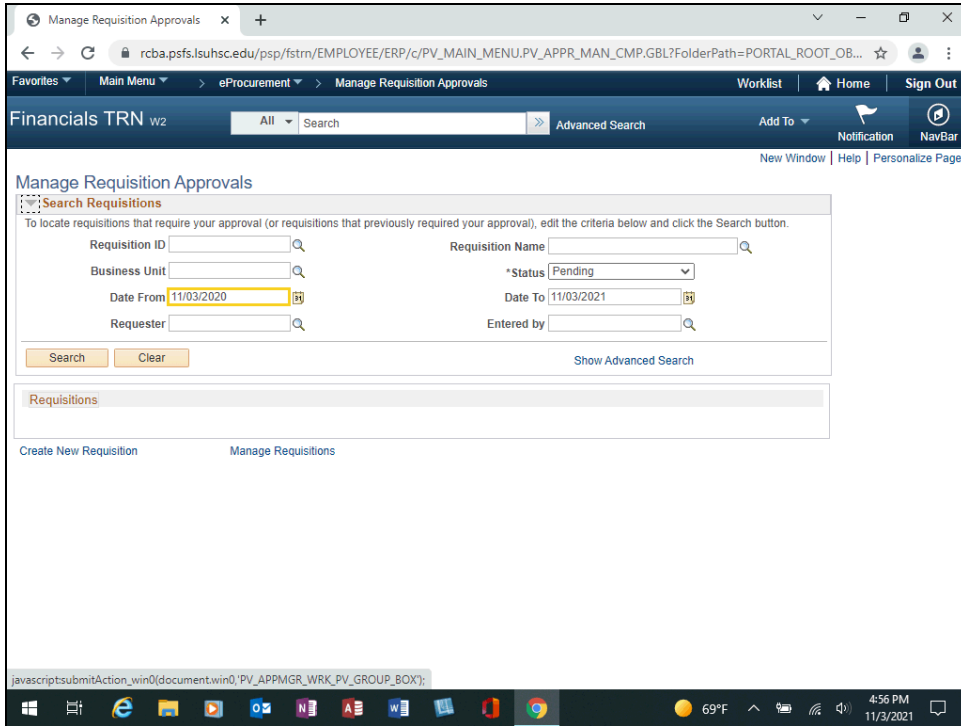
In this topic you will learn how to **Hold an ePro Requisition**.

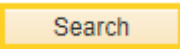
Step	Action
1.	The purpose of this exercise is to demonstrate the approver's ability to Hold a requisition and what occurs to the requisition.



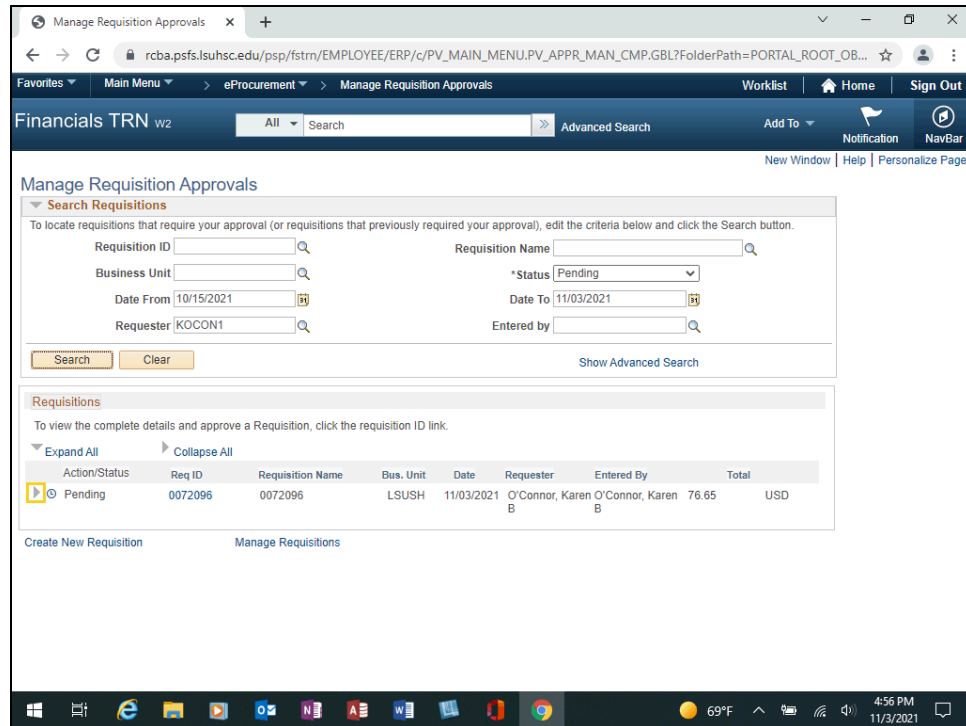
Step	Action
2.	Click the Main Menu button. 
3.	Click the eProcurement menu. 
4.	Click the Manage Requisition Approvals menu. 


Training Guide for eProcurement Requisitions



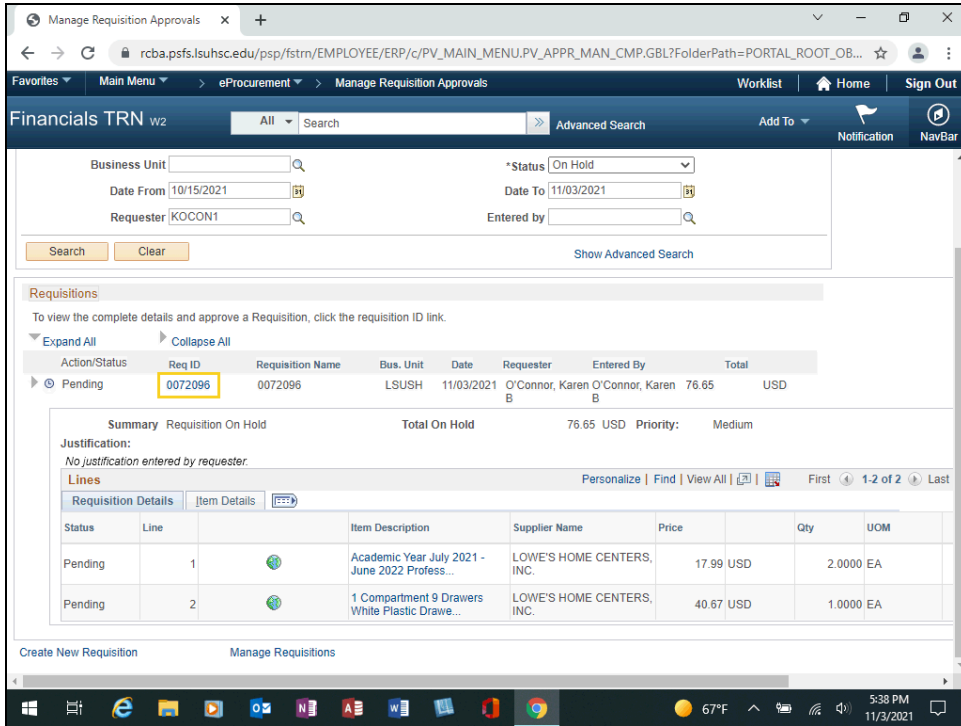
Step	Action
5.	<p>Approvers have several options to use to search requisitions awaiting their approval. You may search by requisition id, date range, requester, etc. In this exercise, users will change the Date From and enter the Requester.</p> <p>Enter the desired information into the Date From field. Enter "101521".</p>
6.	<p>In this exercise, the approver will search for anything requested by KOCON1.</p> <p>NOTE: Requester must be entered in ALL CAPS.</p> <p>Enter the desired information into the Requester field. Enter "KOCON1".</p>
7.	<p>Click the Search button.</p> <p></p>

Training Guide for eProcurement Requisitions



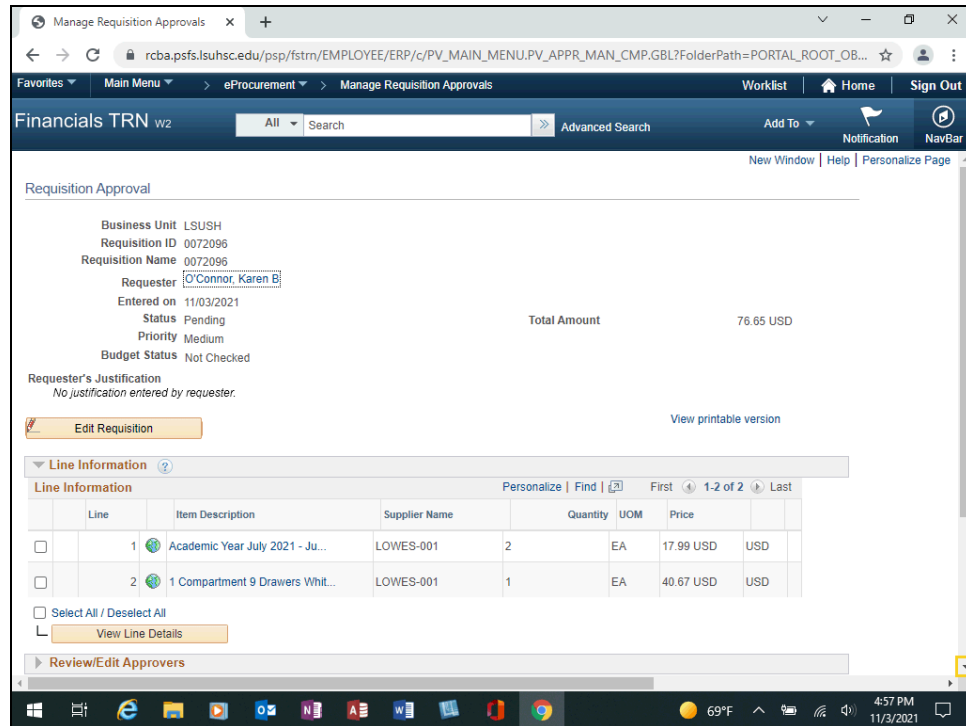
Step	Action
8.	<p>Click the arrow next to the requisition to view the details.</p> <p>Click the Expand Section button.</p> 


Training Guide for eProcurement Requisitions



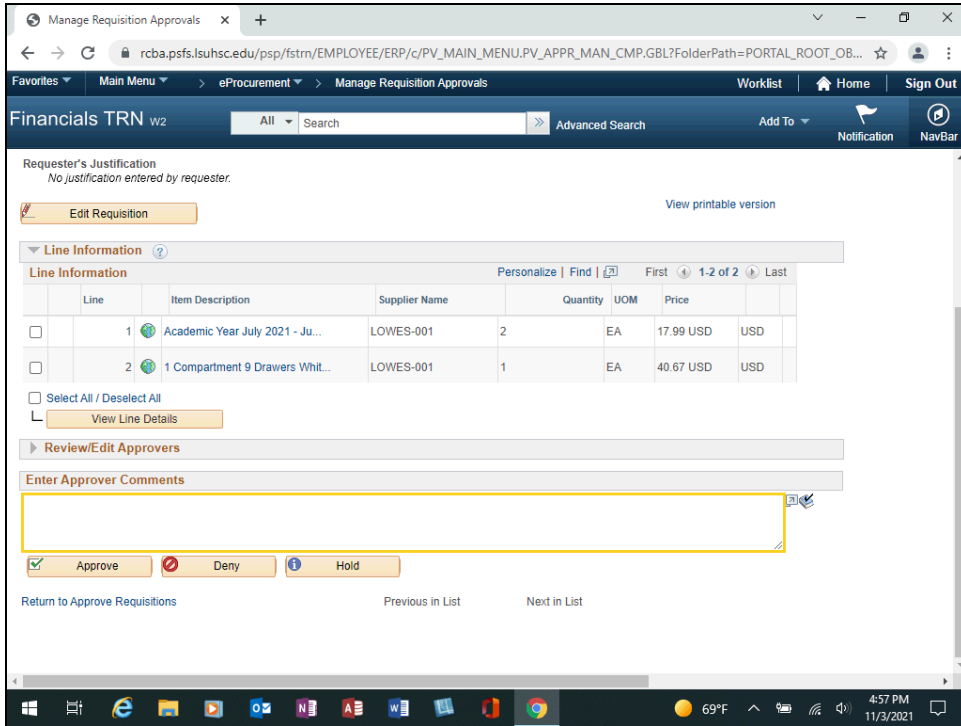
Step	Action
9.	<p>As the approver, you would like to discuss alternatives with the requester for the 9-drawer cabinet. For this exercise, the approver will place the ePro requisition on Hold.</p> <p>Click the Req ID - 0072096 link.</p> <p>0072096</p>

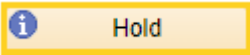
Training Guide for eProcurement Requisitions



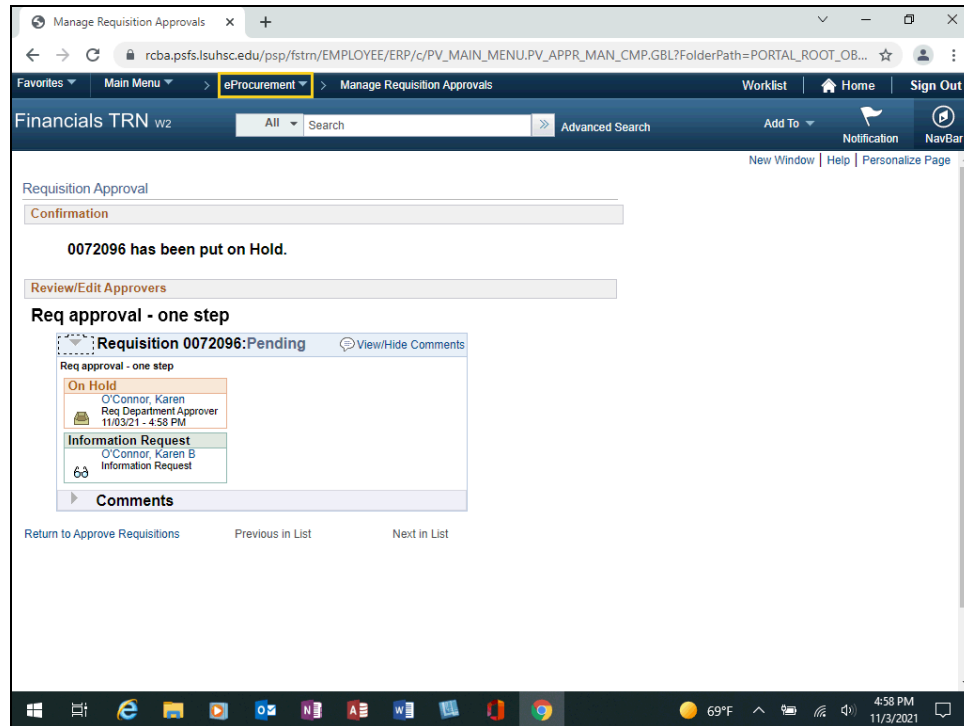
Step	Action
10.	Click the Down scrollbar box. 

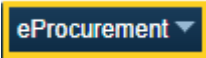

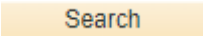
Training Guide for eProcurement Requisitions



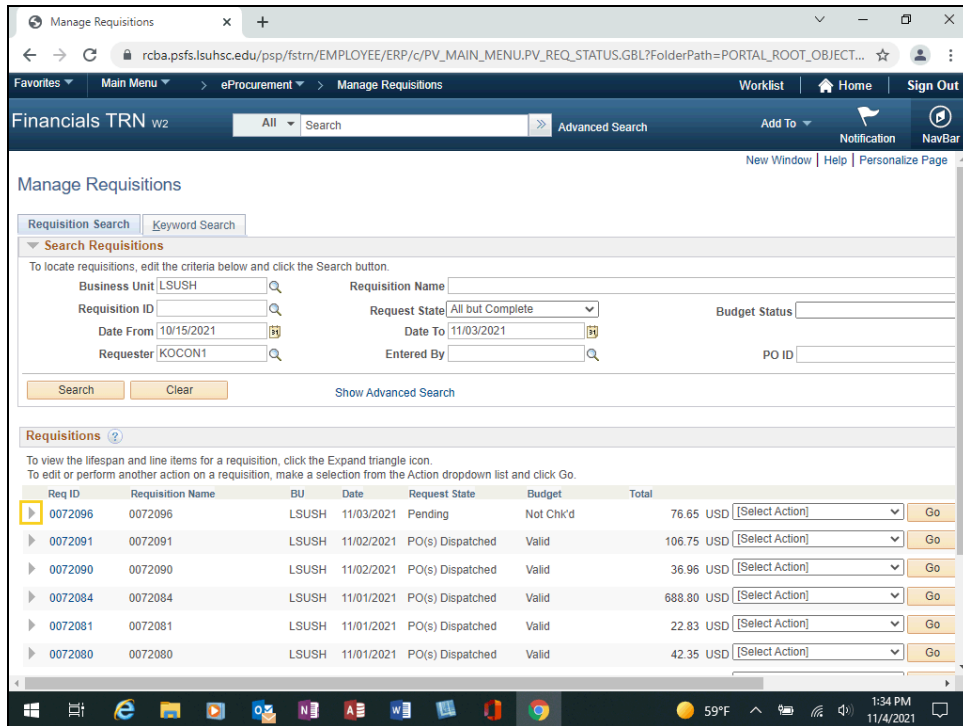
Step	Action
11.	Enter comments as to why you are holding the requisition. Enter the desired information into the Enter Approver Comments field. Enter " Hold requisition to consider other options for drawers. ".
12.	Click the Hold button. 

Training Guide for eProcurement Requisitions



Step	Action
13.	The requisition has been put on Hold. You may verify this by navigating to: Main Menu > eProcurement > Manage Requisitions. Click the eProcurement link. 
14.	Click the Manage Requisitions link. 
15.	Enter the desired information into the Date From field. Enter " 101521 ".
16.	Enter the desired information into the Requester field. Enter " KOCON1 ".
17.	Click the Search button. 

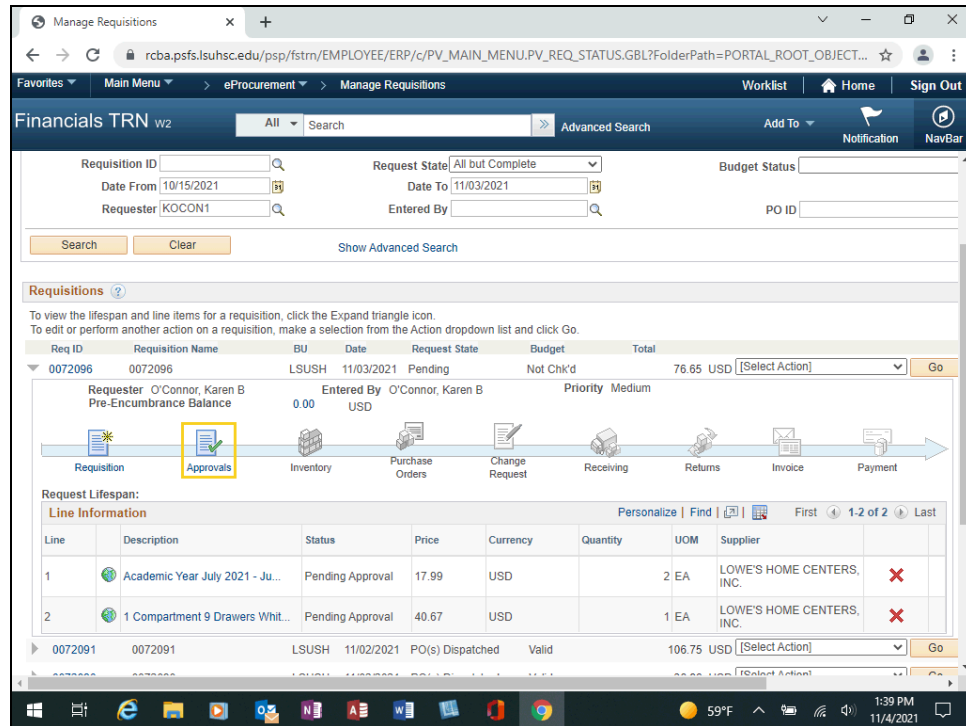
Training Guide for eProcurement Requisitions




Step	Action
18.	Click the Expand Section button to the left of the Req ID field. In this example, Req ID 0072096.

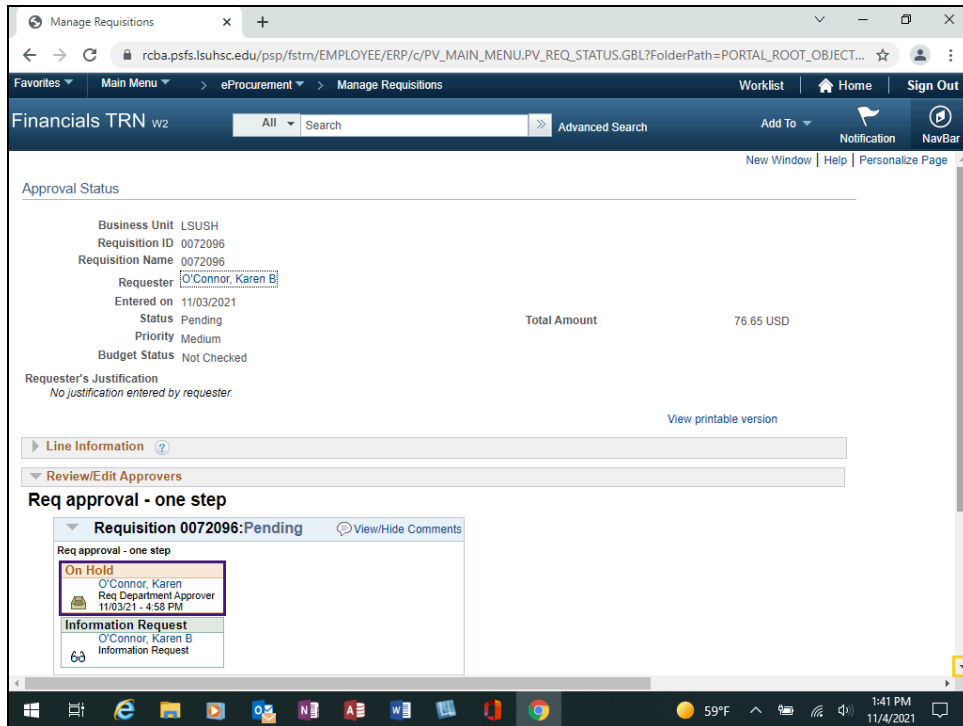



Training Guide for eProcurement Requisitions



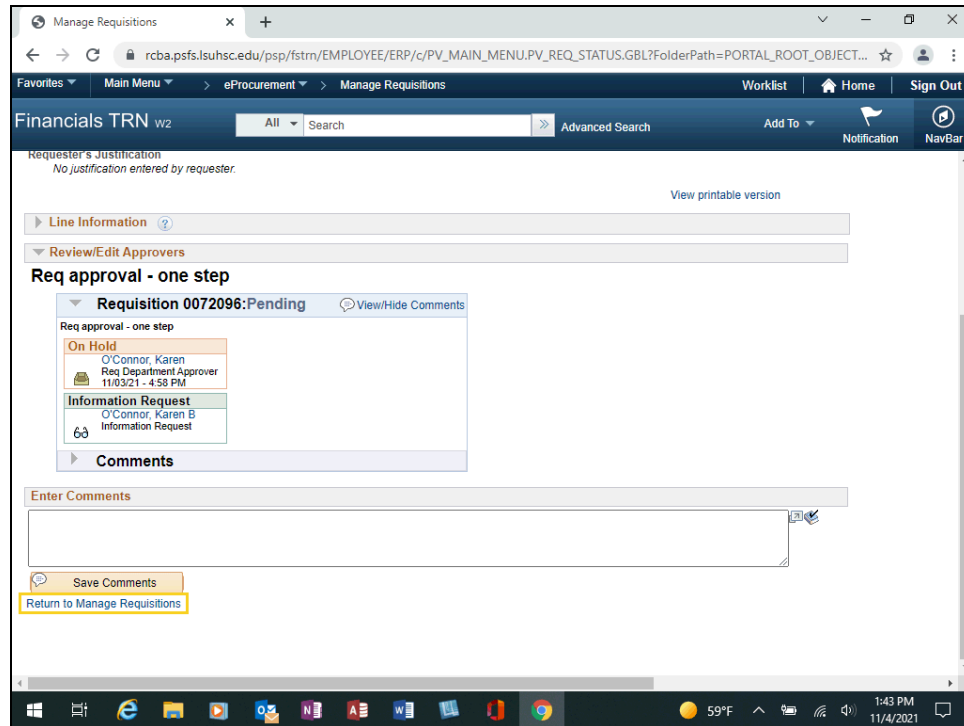
Step	Action
19.	Click the Approvals button. 


Training Guide for eProcurement Requisitions



Step	Action
20.	<p>In the Review/Edit Approvers section, users can view the requisition is on hold, who placed the hold, and the date and time of the hold.</p> <p>Click the Down scrollbar.</p> 

Training Guide for eProcurement Requisitions



Step	Action
21.	Click the Return to Manage Requisitions link. 
22.	This completes <i>Hold an ePro Requisition</i> . End of Procedure.