



PeopleSoft eProcurement Implementation Project



BU Admin re-route of Requisitions, Buyer Preference and Entering Requisitions for More than one BU

**PeopleSoft Version: 9.1 Financials/Supply Chain
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Revision Control

VERSION	DATE	NAME	COMMENTS
1.0	12/28/2016	Aaron Dise	UWSYS Updates
1.5	3/7/2017	Denise McDonald	Using Copy Function to Reinitiate Requisition



UW ePro Approver Assignment Page

The steps below describe the business process of updating the UW ePro Approver Assignment Page. This is needed for permanent HR changes or for temporary updates to the Approver Assignment table. Temporary changes may be due to vacations or employees taking some type of leave.

Steps 1 thru 3 can be followed if you are making a permanent change and there is no need to change the routing on existing requisitions. Continue to step 4 if the change is needed to move existing requisitions with an old department assignment through the system.

1. Follow the path below to the UW ePro Approver Assignment page.

Main Menu > eProcurement > UW eProcurement > UW eProcurement Approver Assignment

Favorites Main Menu > eProcurement > UW eProcurement > UW ePro Approver Assignment

ePro Approver Assignment

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

GL Business Unit: =

Approver Profile: =

Search Clear Basic Search Save Search Criteria

2. Enter or use the magnifying glass to select the GL BU. Use the drop down menu to select the Approver Profile. In most cases the Approver Profile will be Level 1. You could also select Level 2 or Level 3 if changes are needed at those Approval Levels.

Click Search.



Approver Assignments

GL Business Unit: UWSYS
 Approver Profile: L1

Approver Assignments						Personalize	Find	View 100	First	1-15 of 169	Last
*User Id	Employee ID	Name	*Department From	*Department To							
00027748	00027748	SEOW, ROSALIND	953000	953000							
00027748	00027748	SEOW, ROSALIND	986000	986000							
00047699	00047699	STACK, DAVID	503200	503200							
00047699	00047699	STACK, DAVID	503250	503250							
00047699	00047699	STACK, DAVID	503800	503800							
00047699	00047699	STACK, DAVID	503850	503850							
00047699	00047699	STACK, DAVID	503900	503900							
00047699	00047699	STACK, DAVID	503950	503950							
00047699	00047699	STACK, DAVID	505600	505600							
00053941	00053941	RADUE, JANE	301000	301000							
00067098	00067098	DOCKEN, LORIE	601500	601500							
00067098	00067098	DOCKEN, LORIE	601600	601600							
00076244	00076244	TREIS RUSK, DIANE	205000	205000							

- Click Find to search for the appropriate Department to update. In this example we will change Dept ID 400915.

Before Update – User Id is EXAUD71

Approver Assignments

GL Business Unit: UWSYS
 Approver Profile: L1

Approver Assignments						Personalize	Find	View 100	First	166-169 of 169	Last
*User Id	Employee ID	Name	*Department From	*Department To							
EXAUD71	EXAUD71	Auditor, EXAUD71	400915	400915							
EXMRG74	EXMRG74	Employee, EXMRG74	400923	400923							
EXMRG74	EXMRG74	Employee, EXMRG74	403000	403000							
EXMRG75	EXMRG75	Employee, EXMRG75	361000	361000							



After Update – changed User Id from EXAUD71 to EXAUD72.

Approver Assignments

GL Business Unit: UWSYS

Approver Profile: L1

*User Id	Employee ID	Name	*Department From	*Department To		
EXAUD72	EXAUD72	Auditor, EXAUD72	400915	400915	+	-
EXMRG74	EXMRG74	Employee, EXMRG74	400923	400923	+	-
EXMRG74	EXMRG74	Employee, EXMRG74	403000	403000	+	-
EXMRG75	EXMRG75	Employee, EXMRG75	361000	361000	+	-

Click Save to make the update.

A change at this level will route NEW requisitions with this department to the new approver. Existing requisitions WILL NOT automatically route to the new user. If there is a need to re-route existing requisitions, go to step 4, other wise you are done.

- Workflow for existing requisitions with the old department assignment have to be re-initiated to route to the new department approver. Use the below path to access requisitions and re-initiate the workflow.

Main Menu > eProcurement > Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: UWSYS Requisition Name: Request Status: All but Complete Budget Status: Date From: 12/27/2016 Date To: 01/03/2017 Requester: Entered By: PO ID:

Search Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000015	0000000015	UWSYS	12/30/2016	Approved	Not Chk'd	1,000.00 USD	<Select Action> Go
0000000014	test	UWSYS	12/29/2016	Approved	Not Chk'd	60.00 USD	<Select Action> Go
0000000013	0000000013	UWSYS	12/28/2016	Pending	Not Chk'd	10.00 USD	<Select Action> Go
0000000012	0000000012	UWSYS	12/28/2016	Pending	Not Chk'd	1,320.00 USD	<Select Action> Go
0000000011	Collens test	UWSYS	12/28/2016	Pending	Not Chk'd	500.00 USD	<Select Action> Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report



5. Find the requisition in question. Select Copy Requisition from the “Select Action” drop down menu and Select GO.

Shared Financial System
Favorites | Main Menu > eProcurement > Manage Requisitions

Manage Requisitions

Search Requisitions
To locate requisitions, edit the criteria below and click the Search button.

Business Unit: UWSYS Requisition Name: Request Status: All but Complete Budget Status: Date From: 02/28/2017 Date To: 03/07/2017 Requester: 00856855 Entered By: PO ID:

Search Clear

Requisitions
To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total		
0000000073	test reinstantiate2	UWSYS	03/07/2017	Pending	Not Chk'd	200.00 USD	<Select Action>	Go
0000000072	test reinstantiate	UWSYS	03/07/2017	Pending	Not Chk'd	200.00 USD	Copy Requisition	Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

6. The requisition will appear. Everything will be the exact same, except the Requisition Name will be blank. Fill in the Same name.

Shared Financial System
Favorites | Main Menu > eProcurement > Manage Requisitions

Create Requisition

Enter same name

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit for approval.

Business Unit: UWSYS UW Systemwide *Currency: USD
Requester: 00856855 MCDONALD, DENISE Priority: Medium
Requisition Name:

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	test reinstantiate item		1.0000	EACH	200.00000	200.00

Select All / Deselect All Total Amount: 200.00 USD

Add to Favorites Add to Template(s) Modify Line / Shipping / Accounting Delete

Comments

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget

Save & submit Save & preview approvals Cancel requisition Find more items

7. Click Save & Submit.



Department Approval

Line 1: Pending
req entry

Department Approval

Pending
DOCKEN, LORIE
UW ePro Level 1 approver

Controller

Line 1: Awaiting Further Approvals
req entry

Controller

Not Routed
Employee_EXMRG75
UW ePro Level 2 approver

Buyer

Line 1: Awaiting Further Approvals
req entry

Buyer

Not Routed
Auditor_EXAUD71
UW ePro Level 3 approver

[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#) [Check Budget](#)

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

8. The Approval levels should now include the new department approver

Going forward requisitions with this department will automatically be routed to the new approver.

9. Now that the requisition has been recreated, cancel the requisition with the old department approver.

Main Menu > eProcurement > Manage Requisitions



10. Find the Old requisition to cancel. Select Cancel Requisition from the “Select Action” drop down menu and Select GO.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To:

Requester: Entered By: PO ID:

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	Action
0000000074	test again	UWSYS	03/07/2017	Pending	Not Chk'd	200.00 USD	Cancel Requisition <input type="button" value="Go"/>
0000000073	test reinstate2	UWSYS	03/07/2017	Pending	Not Chk'd	200.00 USD	<Select Action> <input type="button" value="Go"/>
0000000072	test reinstate	UWSYS	03/07/2017	Pending	Not Chk'd	200.00 USD	<Select Action> <input type="button" value="Go"/>

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

11. The below screen will appear. Click Cancel Requisition.

Requisition Details for: MCDONALD, DENISE

Business Unit: UWSYS Date: 03/07/2017

Requisition Name: test again Status: Pending

Requisition ID: 0000000074 Total: 200.00 USD

Line Details

Line	Item Description	Status	Price	Qty	Total
1	test reinstate item	Pending Approval	200.00000 EACH	1.0000	200.00

[Return to Manage Requisitions](#)



12. The below screen will appear. You will notice the requisition is now Canceled. The new one you copied should be pending.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: UWSYS Requestion Name:

Requestion ID: Request Status: All but Complete Budget Status:

Date From: 02/28/2017 Date To: 03/07/2017

Requester: 00856855 Entered By: PO ID:

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total		
0000000074	test again	UWSYS	03/07/2017	Canceled	Valid	0.00 USD	<Select Action>	Go
0000000073	test reinitiate2	UWSYS	03/07/2017	Pending	Not Chk'd	200.00 USD	<Select Action>	Go
0000000072	test reinitiate	UWSYS	03/07/2017	Pending	Not Chk'd	200.00 USD	<Select Action>	Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

You are done.



Required Buyer Preference

If a Buyer is unable to process requisitions, the issue may be with the Procurement Preference. Ensure the below is populated with the Buyer's Empl ID.

The screenshot shows the 'Define User Preferences' page for Procurement. The 'Buyer' field is highlighted in yellow. The page includes a navigation breadcrumb: Favorites > Main Menu > Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences. The 'User Preferences' tab is active, and the 'Procurement' sub-tab is selected. The form contains fields for User, Location, Origin, Department, Ship To Location, Requester, and Buyer. Below the form are several links: Contract Process, Payables Online Vouchering, Purchase Order Authorizations, Rebate Authorizations, Receiver / RTV Setup, Vendor Processing Authority, Request for Quote Process, Requisition Authorizations, and Doc Tolerance Authorizations. At the bottom, there are buttons for Save, Return to Search, Previous in List, Next in List, Notify, and Refresh.

Entering Requisitions for More than One BU

If an individual needs to have the ability to enter requisitions for more than one BU, the Overall Preferences have to be updated.

The screenshot shows the 'Define User Preferences' page for Overall Preferences. The 'Business Unit' field is highlighted in yellow. A red text overlay reads: LEAVE BLANK TO ENTER IN REQUISITIONS FOR MORE THAN ONE BU. The page includes a navigation breadcrumb: Favorites > Main Menu > Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences. The 'User Preferences' tab is active, and the 'Overall Preferences' sub-tab is selected. The form contains fields for User ID, Name, Business Unit, SetID, As of Date, and Localization Country. Below the form are checkboxes for Alternate Character Enabled and Display Debit/Credit Amounts in Subsystems. At the bottom, there are buttons for Save, Return to Search, Previous in List, Next in List, Notify, and Refresh.