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
Prepared by: Aaron Dise & Denise McDonald

TABLE OF CONTENTS

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

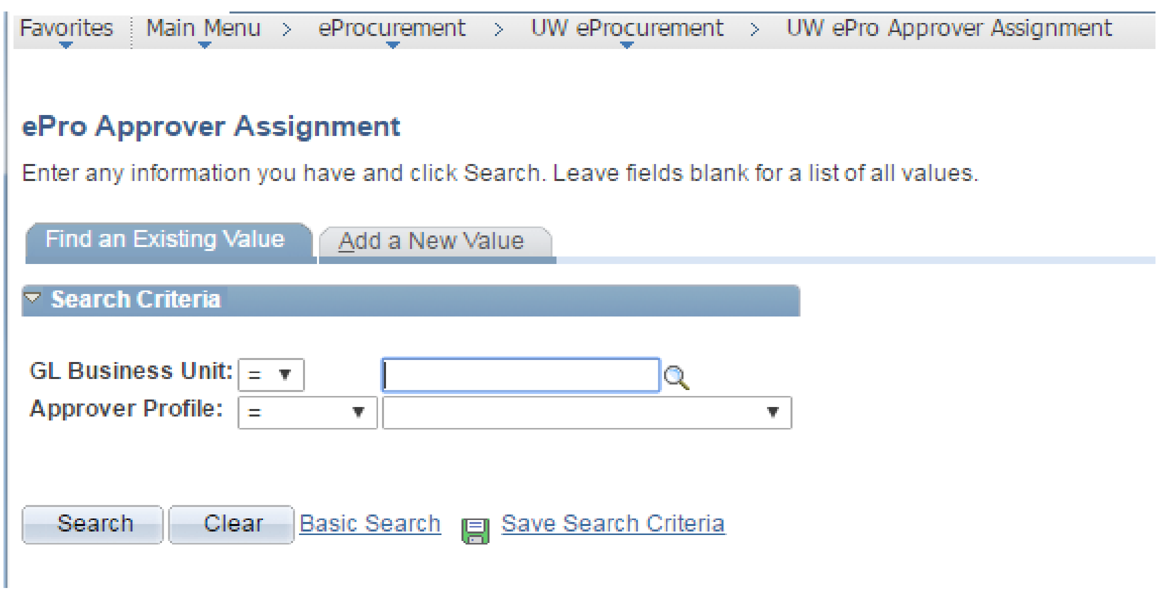
UW ePro Approver Assignment Page

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



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

3. 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

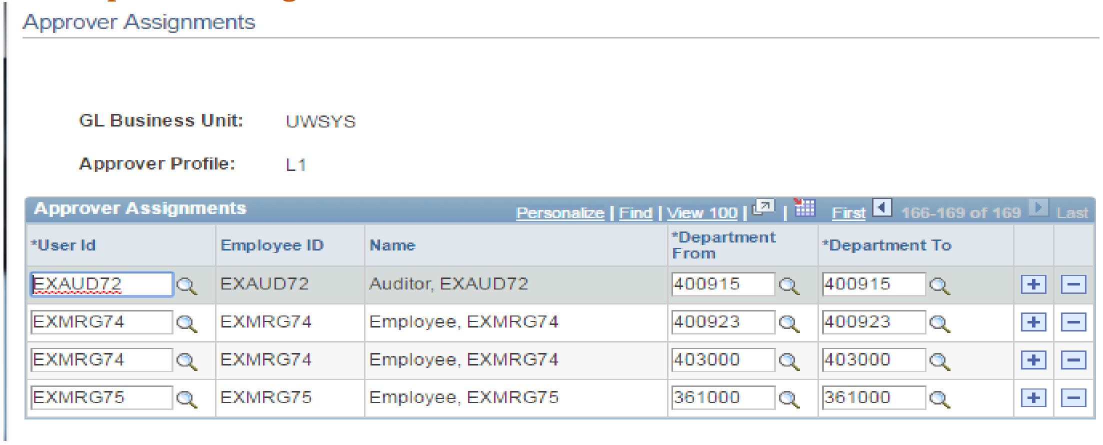
Approver Profile: L1

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

Save | Return to Search | Add | Update/Display

After Update – changed User Id from EXAUD71 to EXAUD72.

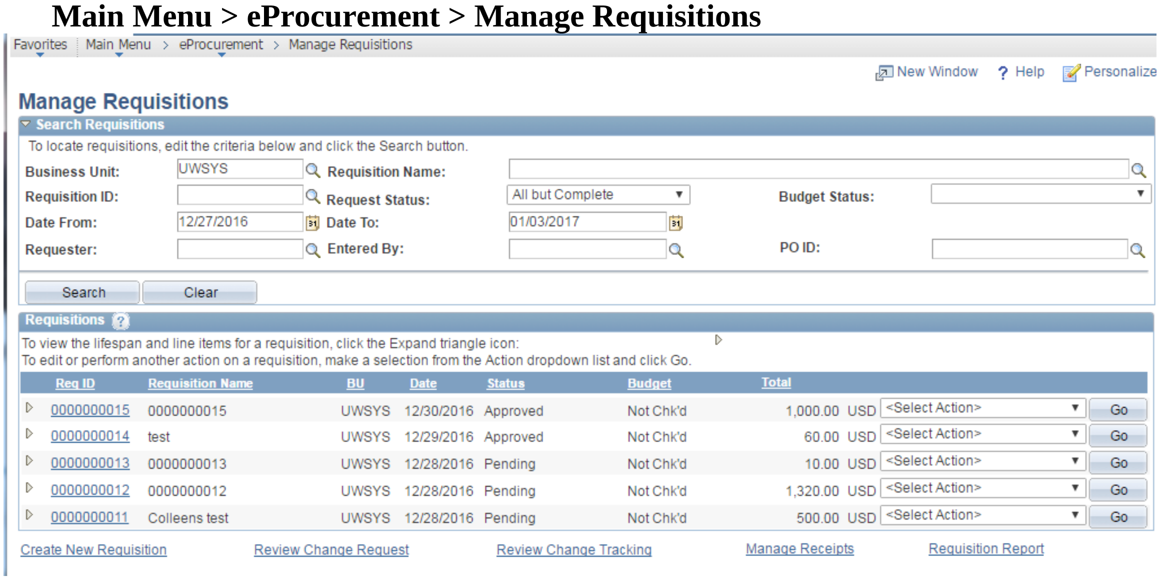


Click Save to make the update.

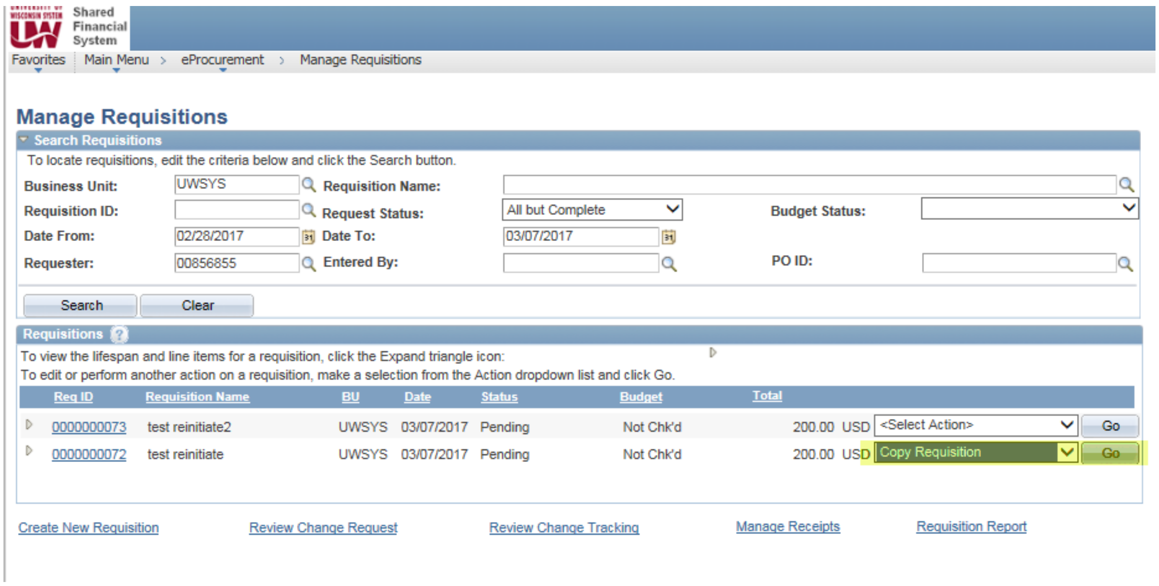
A change at this level will route NEW requisitions with this department to the new approver. Existing requisitions WILL NOT automatically route to the new user. If there is a need to re-route existing requisitions, go to step 4, other wise you are done.

4. 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.

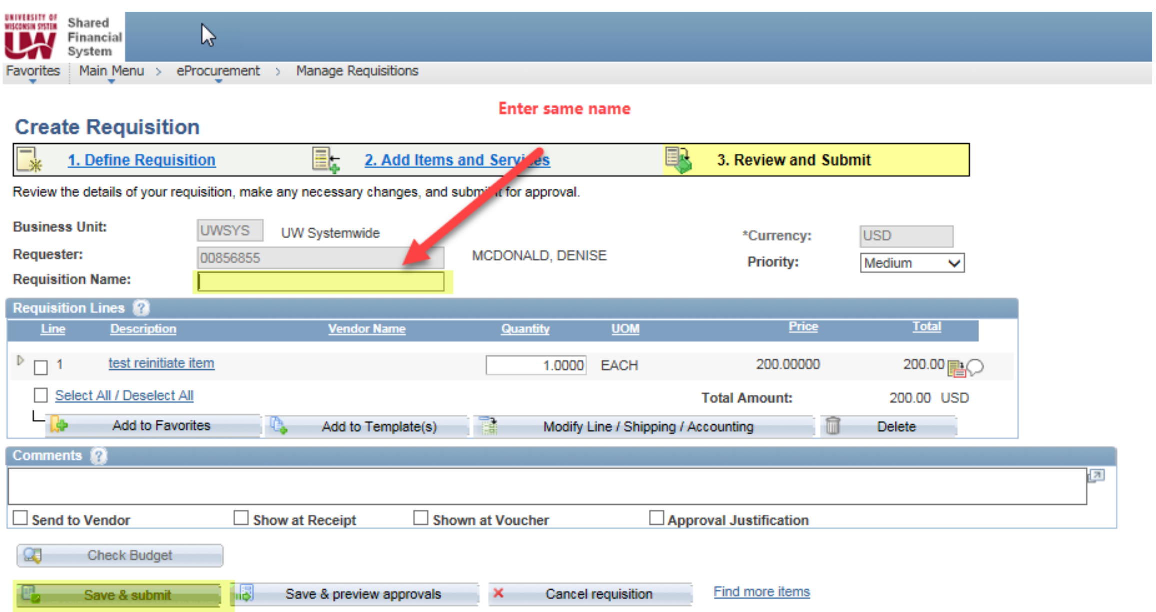
Main Menu > eProcurement > Manage Requisitions



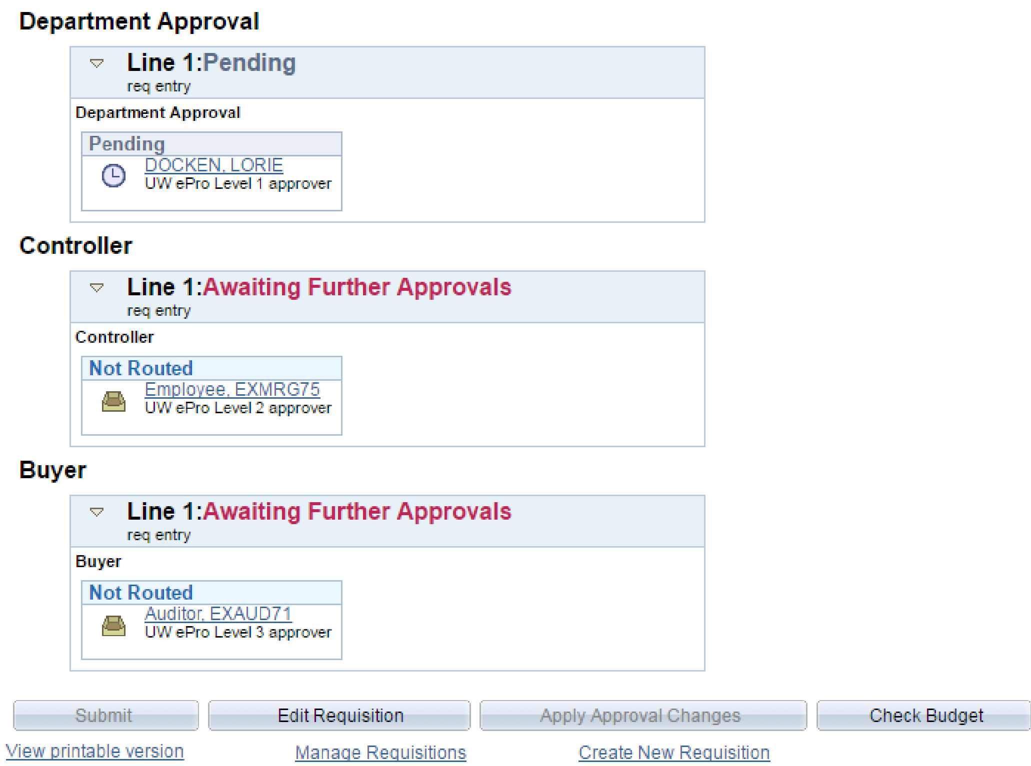
5. Find the requisition in question. Select Copy Requisition from the “Select Action” drop down menu and Select GO.



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



7. Click Save & Submit.

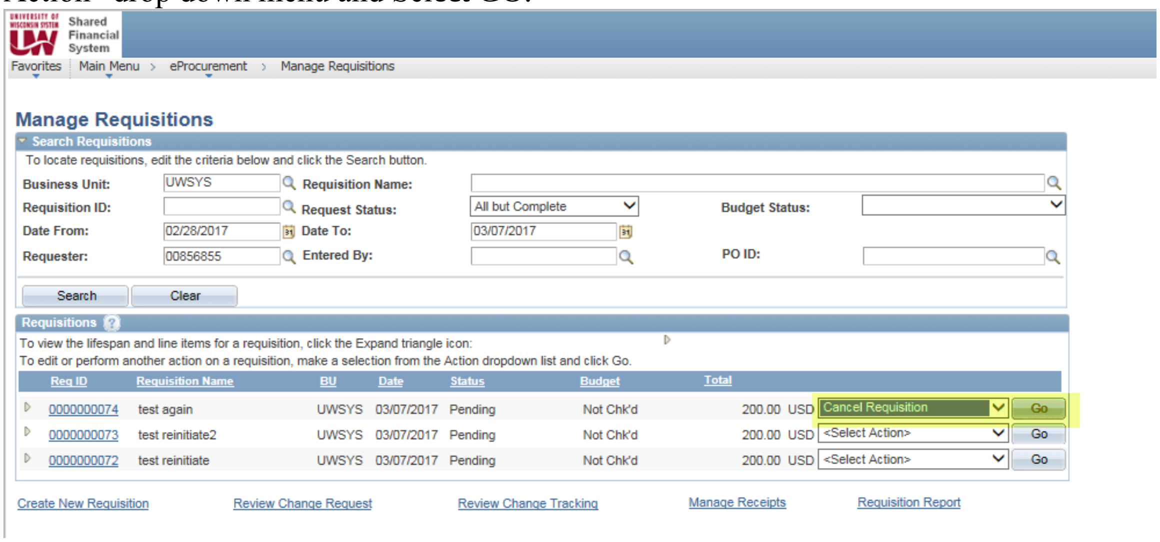


8. The Approval levels should now include the new department approver

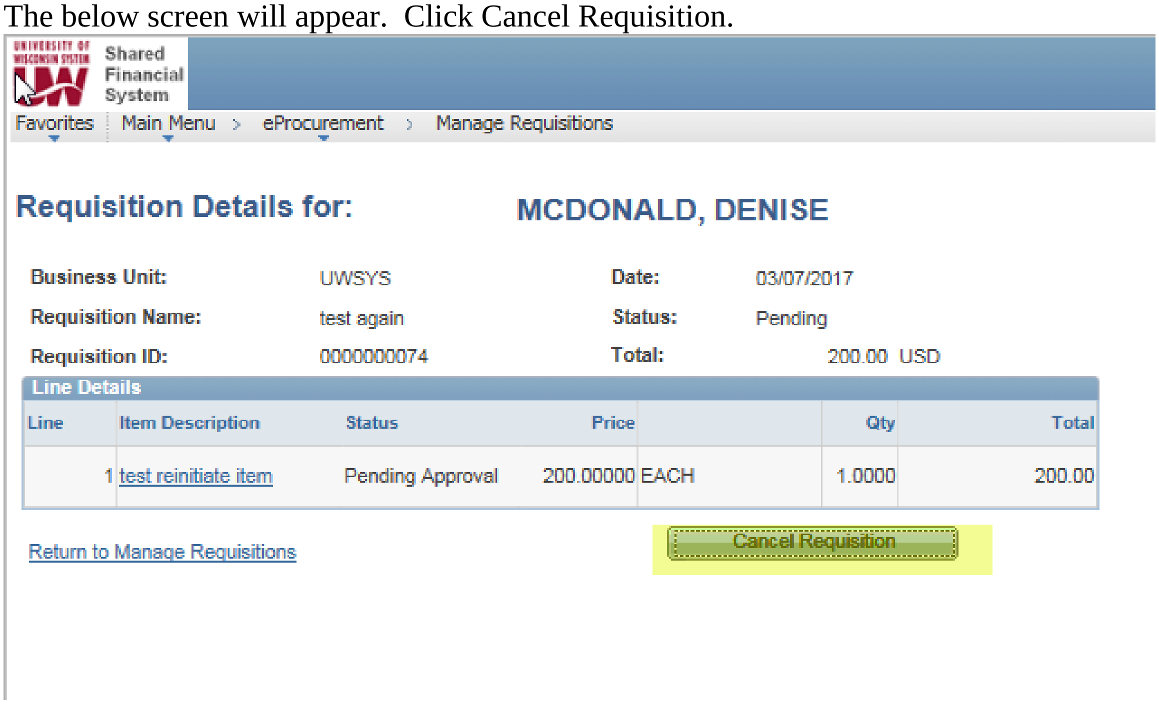
   Going forward requisitions with this department will automatically be routed to the new approver.

9. Now that the requisition has been recreated, cancel the requisition with the old department approver.
   Main Menu > eProcurement > Manage Requisitions

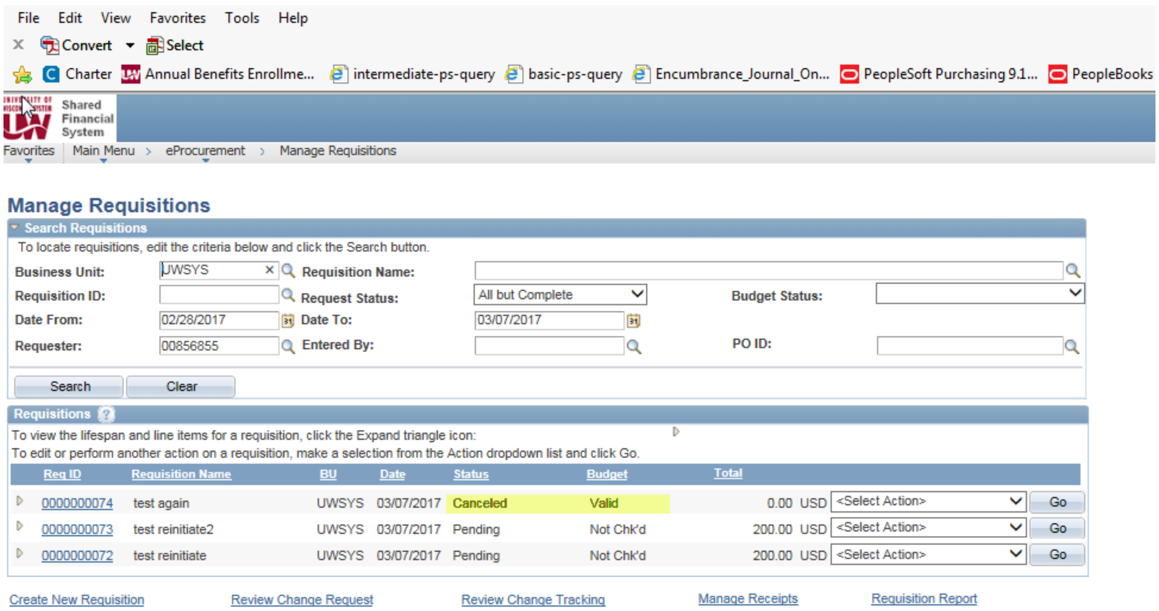
10. Find the Old requisition to cancel. Select Cancel Requisition from the “Select Action” drop down menu and Select GO.



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



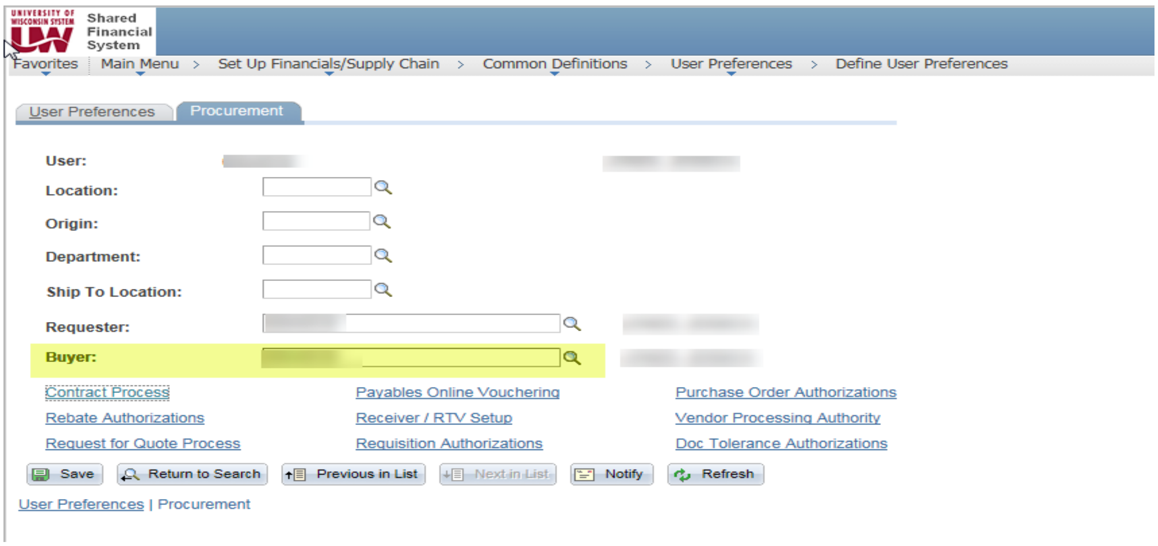
12. The below screen will appear. You will notice the requisition is now Canceled. The new one you copied should be pending.



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.



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.