

PeopleSoft Implementation Project Differentiation Business Process Documentation Requisition Approval

PeopleSoft Version: 9.1 Financials/Supply Chain Author: Aaron Dise



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VERSION	DATE	NAME	COMMENTS
1.0	12/5/2016	Aaron Dise	UAT



Steps for the System

Approve Requisitions

To access the approve requisition page you have the option to select the link from an email, your worklist, or the Manage Requisition Approvals page within PeopleSoft. Please see the below.

Email

A requisition has been entered which requires your attention.

 Requester:
 00856855

 Business Unit:
 UW System Administration

 Requisition ID:
 0000000017

 Requisition Name:
 0000000017

 Line:
 1

 Description:
 DRAWER DIVIDERS

 Date:
 2016-12-06

You can navigate directly to the approval page for more information by clicking the link below.

https://test.sfstest.wisconsin.edu/psp/sfga-FD/EMPLOYEE/SFS/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=UWADM&REQ_ID=0000000010&LINE_NBR=1_

Your Worklist

Worklist

Worklist for CLONE_UW_ePro_Approver1: SFS-13803

Detail View

Worklist Filters 💽 🔻 🔊 Feed 👻

Worklist Items	5				Pers	onalize Find View All 🖉	🐮 First 🗹 1-8 of 8 🕨 Last
From	Date From	Work Item	Worked By Activity	Priority	Link		
DISE, AARON - CONSULTANT	06/15/2016	Approval Routing	Approval Workflow	2-Medium 🔻	Requisition, 312, UWMIL, 2016-06- 15, N. 0, BUSINESS UNIT:UWMIL REQ. ID:0000000005	Mark Worked	Reassign
DISE, AARON - CONSULTANT	06/15/2016	Approval Routing	Approval Workflow	2-Medium V	Requisition, 316, UWMIL, 2016-06- 15, N, 0, BUSINESS UNIT:UWMIL REQ ID:0000000006	Mark Worked	Reassign
DISE, AARON - CONSULTANT	06/15/2016	Approval Routing	Approval Workflow	2-Medium 🔻	Requisition, 320, UWMIL, 2016-06- 15, N, 0, BUSINESS UNIT:UWMIL REQ ID:0000000007	Mark Worked	Reassign
DISE, AARON - CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium V	Requisition, 330, UWMIL, 2016-06- 15, N, 0, BUSINESS UNIT:UWMIL REQ ID:000000008	Mark Worked	Reassign
DISE, AARON - CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium 🔻	Requisition, 339, UWMIL, 2016-06- 15, N, 0, BUSINESS UNIT:UWMIL REQ ID:0000000009	Mark Worked	Reassign
DISE, AARON - CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium V	Requisition, 360, UWMIL, 2016-06- 15, N, 0, BUSINESS UNIT:UWMIL REQ ID:0000000014	Mark Worked	Reassign
DISE, AARON - CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium 🔻	Requisition, 370, UWMIL, 2016-06- 15, N. 0, BUSINESS UNIT:UWMIL REQ. ID:0000000015	Mark Worked	Reassign
DISE, AARON - CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium V	Reguisition, 380, UWMIL, 2016-06- 15, N. 0, BUSINESS UNIT:UWMIL REQ. ID:0000000017	Mark Worked	Reassign



Manage Requisition Approvals Page

Manage Requisition Approvals

Search Requisitions				
To locate requisitions that	at require your approval (or requisit	ions that previously required your approva), edit the criteria below and cli	ck the Search button.
Requisition ID:	Q	Requisition Name:		Q
Business Unit:	Q	*Status:	Pending •	
Date From:	06/22/2015	Date To:	06/21/2016	
Requester:	Q	Entered by:	Q	
Search Cle	ear		Show Advanced Search	
Poquisitions				
To view the complete d	letails and approve a Requisition of	lick the requisition ID link		
✓ Expand All	Collapse All			
Action/Status	Reg ID Requisition N	ame Bus.Unit Date Reque	ster Entered By	Total
⊠© Pending	000000005 000000005	UWMIL 06/15/2016 DISE, AA CONSUL	RON - DISE, AARON - TANT CONSULTANT	1,000.00USD
Summary:	Requisition Pending	Total Pending: 1	,000.00 USD Priority:	Medium
Justification:				
No justification ent	ered by requester.			
Lines		Personalize	Find View All 🛄 First 🗹	1 of 1 🖻 Last
Requisition Details	Item Details			
Status Line	Item Description	Vendor Name Price	Qty UC	M
Pending	1 Adobe Acrobat	ADOBE SYSTEMS INC 500.00	USD 2.0000 EA	СН
Pending	000000006 00000006	UWMIL 06/15/2016 DISE, A CONSU	ARON - DISE, AARON - JLTANT CONSULTANT	500.00 USD
Sending	000000007 000000007	UWMIL 06/15/2016 DISE, A CONSU	ARON - DISE, AARON - JLTANT CONSULTANT	4,500.00 USD
ending	000000008 00000008	UWMIL 06/20/2016 DISE, A CONSU	ARON - DISE, AARON - JLTANT CONSULTANT	5,625.00 USD
ending	000000009 000000009	UWMIL 06/20/2016 DISE, A CONSU	ARON - DISE, AARON - JLTANT CONSULTANT	4,500.00 USD
Sending	000000014 000000014	UWMIL 06/20/2016 DISE, A CONSU	ARON - DISE, AARON - JLTANT CONSULTANT	500.00 USD
Sending	000000015 000000015	UWMIL 06/20/2016 DISE, A CONSU	ARON - DISE, AARON - JLTANT CONSULTANT	500.00 USD
[▶] [©] Pending	000000017 000000017	UWMIL 06/20/2016 DISE, A CONSU	ARON - DISE, AARON - JLTANT CONSULTANT	2,075.00 USD

1. Follow the path to approve a requisition from the Manage Requisition Approval page.

Main Menu > eProcurement > Manage Requisition Approvals

Manage Requis	ition Approva	ls					
Search Requisitions							
To locate requisitions the	at require your approv	al (or requisition	s that previously required your appr	roval), edit the criteria be	low and click the Search button.		
Requisition ID:		Q	Requisition Name:		٩		
Business Unit:		Q	*Status:	Pending	T		
Date From:	06/22/2015	31	Date To:	06/21/2016	31		
Requester:		Q	Entered by:		Q		
Search Cl	Search Clear Show Advanced Search						
Requisitions							
Create New Requisition	Mana	age Requisitions					



2. Click Search to view all requisitions requiring approval. Change Date From and Date To fields as required.

Manage Requis	ition Approv	als							
Search Requisitions									
To locate requisitions the	at require your appro	oval (or requisitions that	at previously ree	quired your a	pproval), edi	t the criteria below a	and click the	Search bu	itton.
Requisition ID:		Q	Requisition	on Name:				Q	
Business Unit:		Q	*Status:		Pe	nding	•		
Date From:	06/22/2015	31	Date To:		06/2	21/2016	31		
Requester:		Q	Entered b	y:			Q		
Search Cl	ear					Show Advanced S	earch		
Requisitions									
To view the complete	details and approve	a Requisition, click the	e requisition ID I	ink.					
	▷ Collapse All								
Action/Status	Reg ID	Requisition Name	<u>Bus. Unit</u>	Date	Requester	Entered By		<u>Total</u>	
e Pending	000000005	000000005	UWMIL	06/15/2016	DISE, AARO	ON - DISE, AARON		1,000.00	USD
S Pending	000000006	000000006	UWMIL	06/15/2016	DISE, AARO	ON - DISE, AARON NT CONSULTANT		500.00	USD
Image: Pending	000000007	000000007	UWMIL	06/15/2016	DISE, AARO CONSULTA	ON - DISE, AARON		4,500.00	USD
Image: Sending	00000008	000000008	UWMIL	06/20/2016	DISE, AARO	ON - DISE, AARON NT CONSULTANT		5,625.00	USD
Image: Pending	000000009	000000009	UWMIL	06/20/2016	DISE, AARO	ON - DISE, AARON NT CONSULTANT		4,500.00	USD
Image: Pending	000000014	000000014	UWMIL	06/20/2016	DISE, AARO	ON - DISE, AARON	-	500.00	USD
Image: Pending	000000015	000000015	UWMIL	06/20/2016	DISE, AARO CONSULTA	ON - DISE, AARON		500.00	USD
S Pending	000000017	000000017	UWMIL	06/20/2016	DISE, AARO CONSULTA	ON - DISE, AARON NT CONSULTANT		2,075.00	USD
Create New Requisition	Ma	nage Requisitions							

3. Click requisition number. Per the above example if approving first item listed, select 000000005 to approve/deny the requisition.



Business L Requisition Requisition Requester: Entered on: Status: Priority: Requester' No just	Jnit: n ID: n Name: : : s Justifica tification en	UWMIL 000000005 DISE, AARON - CON 06/15/2016 Pending Medium tion: tered by requester.	<u>ISULTANT</u>	Total Amount:	:		1,00	0.00 USD
							View printable	version
Line Information	rmation 👔)			_			
Line inform	Line	Item Description	Vendor Name		<u>Per</u>	sonalize	Find First 1 o	f 1 🗳 Last
	Line	item Description	venuor mame		Quantity	UOM	Flice	
	1	Adobe Acrobat	ADOBESYSTE-001		2.0000	EA	500.00000	USD
Select All / Deselect All Wew Line Details								
Enter Appr	rover Com	ments						
A	.pprove	🔗 Deny						1
Return to Ap	pprove Reg	uisitions	Prev	vious in List	<u>Next in List</u>			

4. The above will appear. Click Approve to approve the requisition. The below will appear after you click Approve. The requisition will be either routed for further approval or will be completed and ready for PO creation and dispatch from the Buyer. Your are done.

Requisition Approval	
Confirmation	
✓ 000000005 has been routed for further approval.	
Review/Edit Approvers	
\$\$\$\$ Approval	
Requisition 000000005:Pending	
Level 1 > 5k	
Approved	
SFS-13803 UW_ePro_Approver1 06/21/16 - 8:53 AM	