



# **PeopleSoft Implementation Project**



## **Business Process Documentation**

### **Requisition Approval**

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

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: 000000017  
 Requisition Name: 000000017  
 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/sfqa-FD/EMPLOYEE/SFS/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_APPROVAL.GBL?Action=U&BUSINESS\\_UNIT=UWADM&REQ\\_ID=000000010&LINE\\_NBR=1](https://test.sfstest.wisconsin.edu/psp/sfqa-FD/EMPLOYEE/SFS/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=UWADM&REQ_ID=000000010&LINE_NBR=1)

### Your Worklist

#### Worklist

Worklist for CLONE\_UW\_ePro\_Approver1: SFS-13803

[Detail View](#)

Worklist Filters

Worklist Items						Personalize	Find	View All	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	<a href="#">Requisition 312 UWMIL_2016-06-15 N.O.BUSINESS_UNITUWMIL REQ ID:000000005</a>	Mark Worked				Reassign
DISE, AARON CONSULTANT	06/15/2016	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition 316 UWMIL_2016-06-15 N.O.BUSINESS_UNITUWMIL REQ ID:000000006</a>	Mark Worked				Reassign
DISE, AARON CONSULTANT	06/15/2016	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition 320 UWMIL_2016-06-15 N.O.BUSINESS_UNITUWMIL REQ ID:000000007</a>	Mark Worked				Reassign
DISE, AARON CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition 330 UWMIL_2016-06-15 N.O.BUSINESS_UNITUWMIL REQ ID:000000008</a>	Mark Worked				Reassign
DISE, AARON CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition 339 UWMIL_2016-06-15 N.O.BUSINESS_UNITUWMIL REQ ID:000000009</a>	Mark Worked				Reassign
DISE, AARON CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition 360 UWMIL_2016-06-15 N.O.BUSINESS_UNITUWMIL REQ ID:000000014</a>	Mark Worked				Reassign
DISE, AARON CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition 370 UWMIL_2016-06-15 N.O.BUSINESS_UNITUWMIL REQ ID:000000015</a>	Mark Worked				Reassign
DISE, AARON CONSULTANT	06/20/2016	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition 380 UWMIL_2016-06-15 N.O.BUSINESS_UNITUWMIL REQ ID:000000017</a>	Mark Worked				Reassign





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

### Manage Requisition Approvals

**Search Requisitions**

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID:	<input type="text"/>	Requisition Name:	<input type="text"/>
Business Unit:	<input type="text"/>	*Status:	<input type="text" value="Pending"/>
Date From:	<input type="text" value="06/22/2015"/>	Date To:	<input type="text" value="06/21/2016"/>
Requester:	<input type="text"/>	Entered by:	<input type="text"/>

[Show Advanced Search](#)

**Requisitions**

To view the complete details and approve a Requisition, click the requisition ID link.

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
⊟ Pending	<a href="#">000000005</a>	000000005	UWMIL	06/15/2016	DISE, AARON - CONSULTANT	DISE, AARON - CONSULTANT	1,000.00 USD
⊟ Pending	<a href="#">000000006</a>	000000006	UWMIL	06/15/2016	DISE, AARON - CONSULTANT	DISE, AARON - CONSULTANT	500.00 USD
⊟ Pending	<a href="#">000000007</a>	000000007	UWMIL	06/15/2016	DISE, AARON - CONSULTANT	DISE, AARON - CONSULTANT	4,500.00 USD
⊟ Pending	<a href="#">000000008</a>	000000008	UWMIL	06/20/2016	DISE, AARON - CONSULTANT	DISE, AARON - CONSULTANT	5,625.00 USD
⊟ Pending	<a href="#">000000009</a>	000000009	UWMIL	06/20/2016	DISE, AARON - CONSULTANT	DISE, AARON - CONSULTANT	4,500.00 USD
⊟ Pending	<a href="#">000000014</a>	000000014	UWMIL	06/20/2016	DISE, AARON - CONSULTANT	DISE, AARON - CONSULTANT	500.00 USD
⊟ Pending	<a href="#">000000015</a>	000000015	UWMIL	06/20/2016	DISE, AARON - CONSULTANT	DISE, AARON - CONSULTANT	500.00 USD
⊟ Pending	<a href="#">000000017</a>	000000017	UWMIL	06/20/2016	DISE, AARON - CONSULTANT	DISE, AARON - CONSULTANT	2,075.00 USD

[Create New Requisition](#)

[Manage Requisitions](#)

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



Requisition Approval

Business Unit: UWMIL  
 Requisition ID: 0000000005  
 Requisition Name: 0000000005  
 Requester: [DISE, AARON - CONSULTANT](#)  
 Entered on: 06/15/2016  
 Status: Pending Total Amount: 1,000.00 USD  
 Priority: Medium  
 Requisition's Justification:  
*No justification entered by requester.*

[View printable version](#)

Line Information ?

Line	Item Description	Vendor Name	Quantity	UOM	Price	
<input checked="" type="checkbox"/>	1 <a href="#">Adobe Acrobat</a>	ADOBESYSTE-001	2.0000	EA	500.00000	USD

Select All / Deselect All

Review/Edit Approvers

Enter Approver Comments

[Return to Approve Requisitions](#)

[Previous in List](#)

[Next in List](#)

- The above will appear. Click  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. You are done.

Requisition Approval

Confirmation

**0000000005 has been routed for further approval.**

Review/Edit Approvers

\$\$\$\$ Approval

▼ **Requisition 0000000005: Pending**

Level 1 > 5k

**Approved**

[SFS-13803](#)  
 UW\_ePro\_Approver1  
 06/21/16 - 8:53 AM