




PEOPLESFT
FINANCIALS 92

Approving Requisitions

There are multiple ways to get to the information to review prior to clicking approve for a requisition.

Included in this manual are four different ways to navigate to requisitions requiring approval, if you do not click on the link from your email notification.

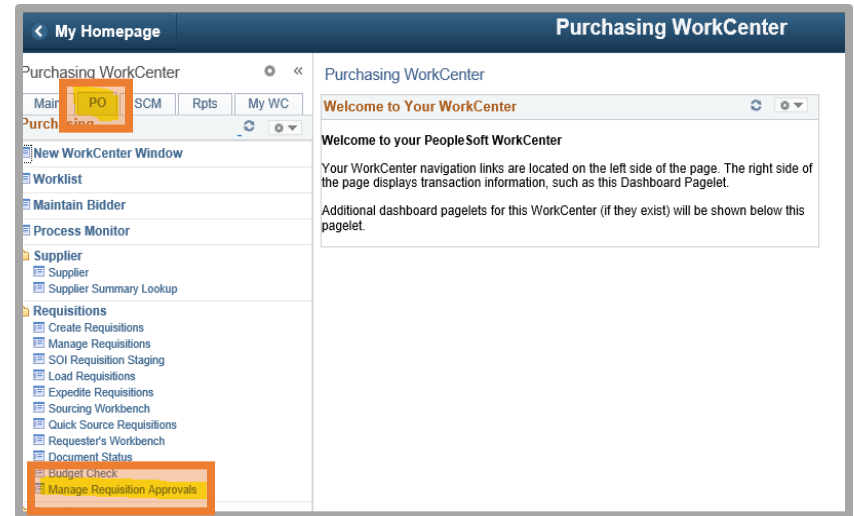
 If you click on the link in your email notification, begin with the **Header Information** step in the following approval methods.

Approving requisitions through Manage Requisition Approvals.....	3
Navigation.....	3
Header Information	4
Line Details.....	4
Approver Comments and Approval Chain	7
Approving requisitions through NavBar Approvals.....	9
Navigation.....	9
Header Information	10
Line Details.....	10
Approver Comments and Approval Chain	12
Approving requisitions through Worklist	13
Navigation.....	13
Header Information	14
Line Details.....	14
Approver Comments and Approval Chain	15
Approving requisitions through WorkCenter Pending Approvals	17
Navigation.....	17
Requisition Approval Screen.....	18
Chartfield Information	19
Approver Comments.....	19
Additional requisitions to approve	20

Approving requisitions through Manage Requisition Approvals

Navigation

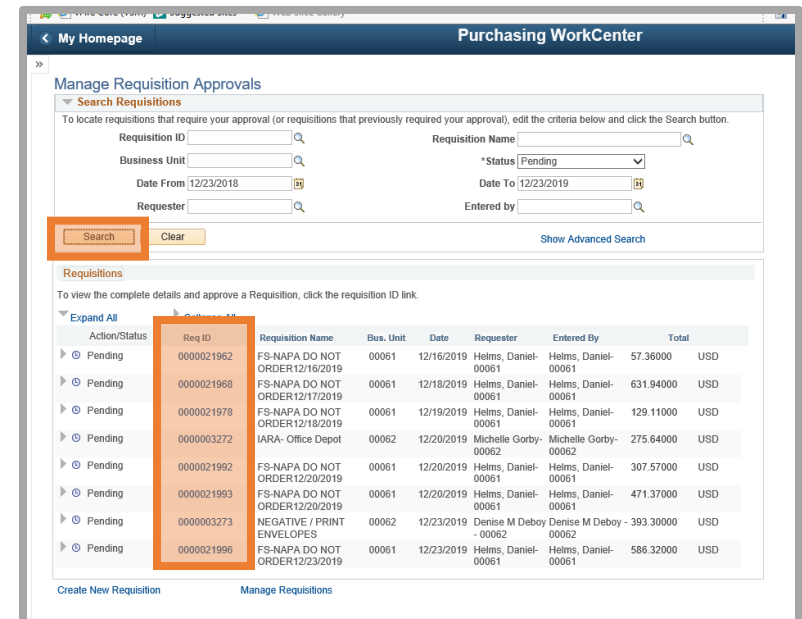
In the Purchasing WorkCenter, on the PO tab, click **Manage Requisition Approvals**.



When **Manage Requisition Approvals** opens, the **Date From**, **Date To**, and **Status** fields should auto-populate.

- ! If the Requisitions list doesn't appear, click the **Search** button to get a list of all requisitions awaiting approval in your queue.

Click on the blue **Req ID** for the requisition you want to review.



Header Information

The header information for the requisition will appear, along with the line items on the requisition.

You may wish to click on [Header comments and attachments](#) to view any comments and attachments associated with the requisition header. A new window will open displaying the information.

When you have finished reviewing, click the **X** in the top right corner of the box.

Click the arrow (>) at the end of the first row.

Home Requisition

Request for FS-NAPA DO NOT ORDER12/16/2019
57.36 USD

Approve Deny Pushback

Header is pending your approval
In Process - Multiple Approvers

Summary

Business Unit 00061 Requisition ID 0000021962
Routed Date December 16, 2019 Requisition Date December 16, 2019
Requester Helms, Daniel-00061 Entered by Helms, Daniel-00061
Approval Justification STOCK INVOICE#009936 Budget Header Status Valid
Origin

Edit Requisition

More Information

Header comments and attachments >

Lines 1 row

Line Number	Item Description	Merchandise Amount
1	NAPA: NAPA Motor Oil 5W20	57.36 USD

Approver Comments

Approval Chain >

Line Details

A new page will open with the Line Details, including Shipping Information, quantities, and pricing.

If a specific line has comments or attachments associated with it, there will be a section titled **More Information** under the **Shipping Information**. Included in that section will be a box with Line comments and attachments in it.

Click [Line comments and attachments](#) to view line comments and any included attachments for that line. A new window will open.

Back to Header Approval Line Detail

OFFICE_DEPOT: uni-ball(R) Gel Grip(TM) Pens, Medium Point, 0.7 mm, Clear Barrel, Red Ink, Pack Of 12
17.04 USD

Line Details

Business Unit 00061 Requisition ID 000019211
Line 1 Item ID
Supplier OFFICEDEPO-001 Quantity 2 DZN
Price 8.52 USD Ship To 061GRND

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	061GRND	2 DZN	8.52 USD	17.04 USD	Werner, Jeania-061	2019-03-12

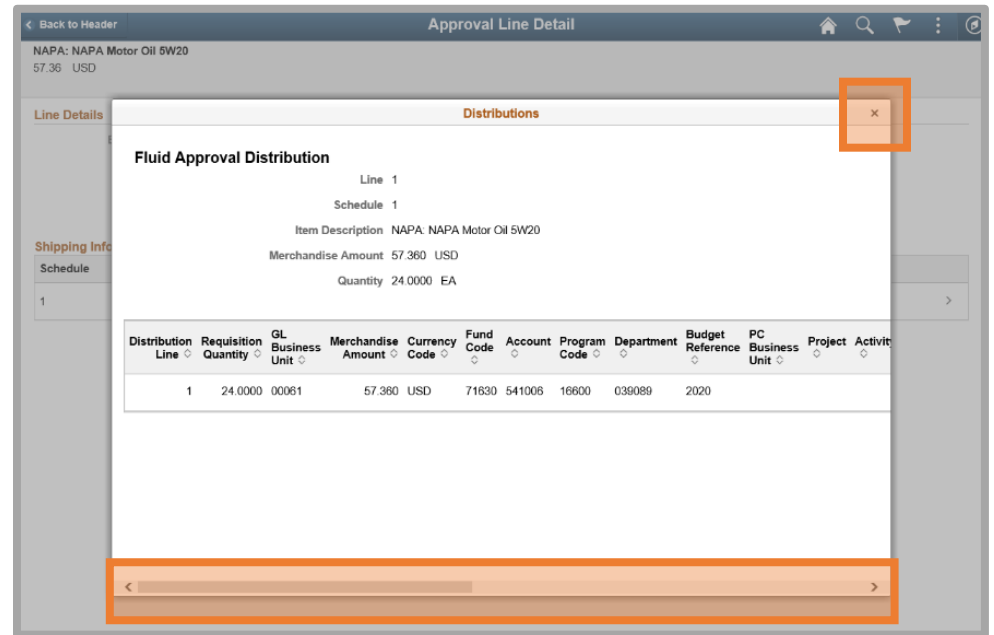
More Information

Line comments and attachments >

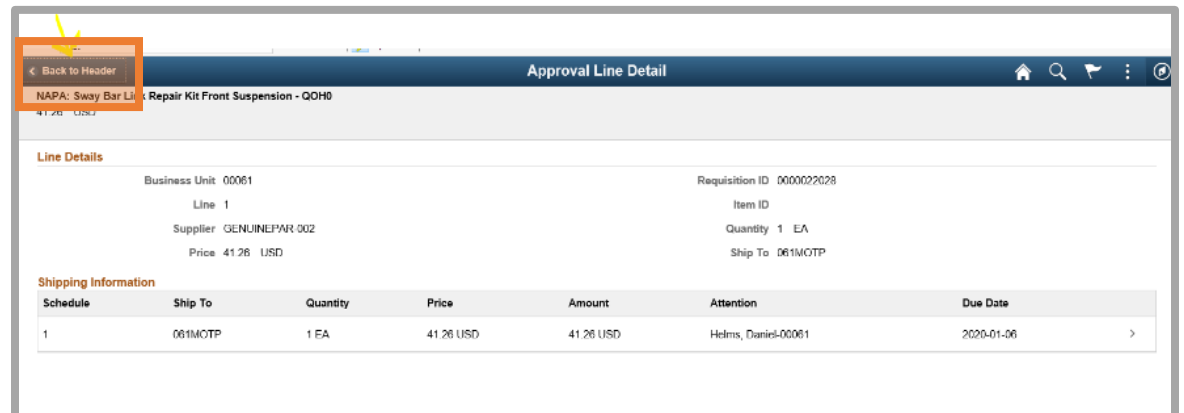
A new window will open that contains the chartfields entered for that line.

Use the scroll bar to view all chartfield information entered.

When you are finished with the window, click the **X** in the top right corner.



Click the **Back to Header** button in the top left corner of your screen to return to the requisition Header page to complete the same process with all other lines on the requisition.



Approver Comments and Approval Chain

Once you have verified the chartfields entered on each line and have returned to the header page, you are ready to approve or deny.

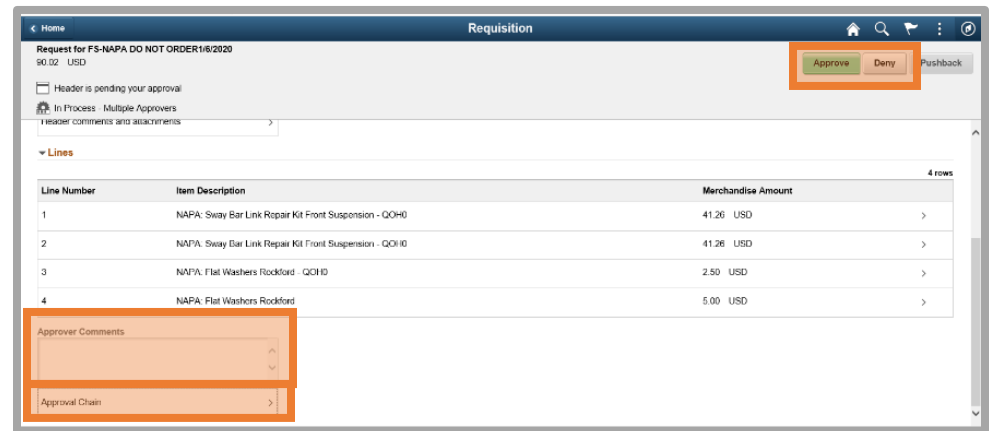
There is a field on the approval page for comments if you want to include any.

You may also want to click on **Approval Chain** to view other people included in approvals for that requisition.

A new window will open with the Approval Chain.

When finished with that window, click the **X** in the top right corner.

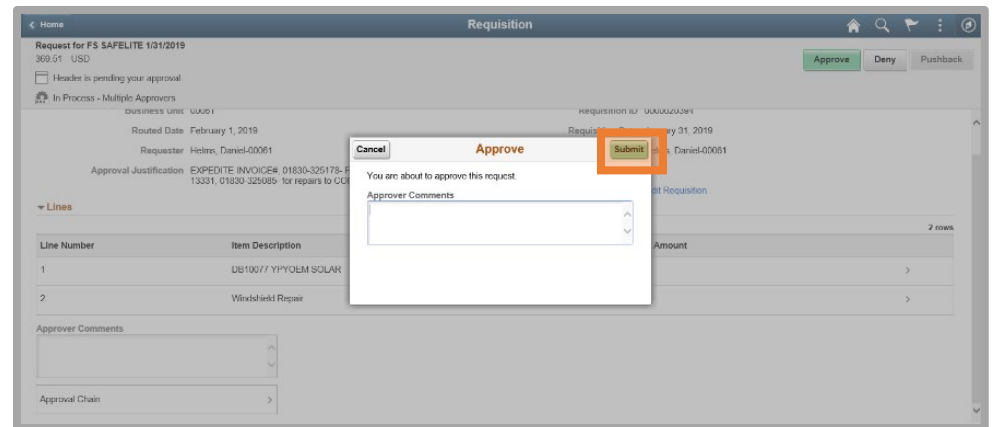
You are now ready to click **Approve** or **Deny** in the top right corner.



Once you click on **Approve** or **Deny**, a box will open with any Approver Comments you entered or a blank box to give you another opportunity to enter comments, if you would like to enter comments.

If you chose **Deny**, you will be required to enter a comment in order to proceed.

When ready, click the **Submit** button.



! If you click the **Cancel** button, Peoplesoft will send you back to the requisition header page.

Click the **Home** button in the top left corner to return to your **WorkCenter**, where you can click on the **PO** tab to begin the process again for the next item in your approval list.

The screenshot displays a web application interface for a Requisition. At the top left, a navigation bar contains a 'Home' button highlighted with an orange box and a 'Request for' button. The main header shows 'Requisition' and a breadcrumb trail: 'In Process > Nancy L.Morris > 00051'. Below the header is a 'Summary' section with the following details:

- Business Unit: 00061
- Routed Date: January 29, 2019
- Requester: Holmes, Daniel-00061
- Approval Justification: EXPEDITE INVOICE#, 733069, 732191, 732867, 732355, 732281, 733446
- Requisition ID: 000020370
- Requisition Date: January 25, 2019
- Entered by: Holmes, Daniel-00061
- Budget Header Status: Valid

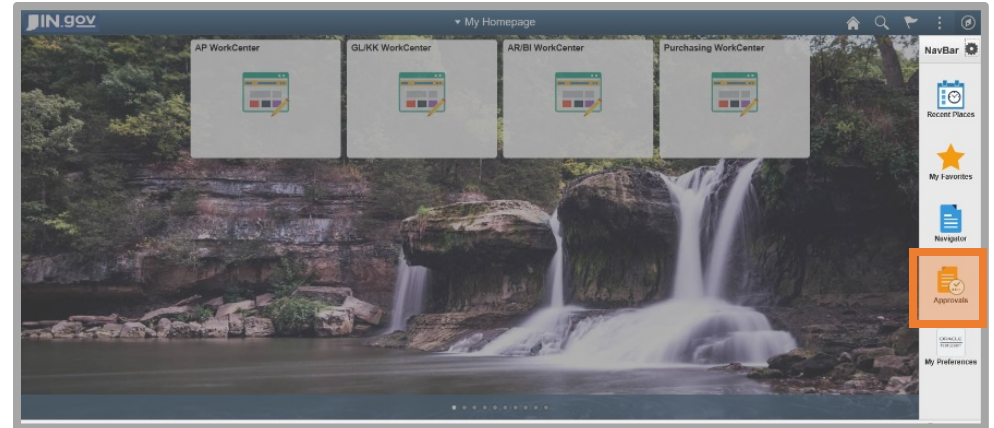
Below the summary is a 'Lines' section with a table containing 15 rows. The table has three columns: 'Line Number', 'Item Description', and 'Merchandise Amount'. The first two rows are visible:

Line Number	Item Description	Merchandise Amount
1	17528B BLADE	11.71 USD
2	5169652AC TENSION STRUT	90.45 USD

Approving requisitions through NavBar Approvals

Navigation

Click NavBar >> Approvals

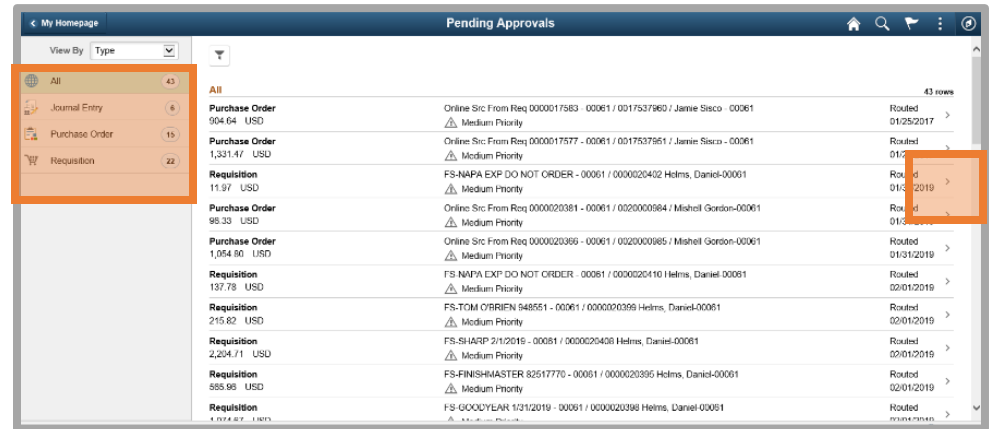


Your screen will display all items in your worklist to approve.

! You may wish to click on the type of item you are currently trying to find, e.g. Requisition, Purchase Order, etc.

By choosing one type of item, you will only see those items in your list of approvals.

Find the requisition you are interested in reviewing and click the arrow (>) at the right end of that row.



Header Information

The requisition header will come up with the line items.

You may wish to click on **Header comments and attachments** to view any comments and attachments associated with the requisition header.

When you have finished reviewing, click the **X** in the top right corner of the box.

Click the arrow (>) at the end of the first row.

Home Requisition

Request for FS-NAPA DO NOT ORDER12/16/2019
57.36 USD

Approve Deny Pushback

Header is pending your approval
In Process - Multiple Approvers

Summary

Business Unit 00061	Requisition ID 0000021962
Routed Date December 16, 2019	Requisition Date December 16, 2019
Requester Helms, Daniel-00061	Entered by Helms, Daniel-00061
Approval Justification STOCK INVOICE#009636	Budget Header Status Valid

Origin
[Edit Requisition](#)

Header comments and attachments >

Line Number	Item Description	Merchandise Amount
1	NAPA NAPA Motor Oil 5W20	57.36 USD

Approver Comments

Approval Chain >

Line Details

A new page will open with the Line Details, including Shipping Information, quantities, and pricing.

If a specific line has comments or attachments associated with it, there will be a section titled More Information under the Shipping Information.

Included in that section will be a box with **Line comments and attachments** in it. Click on it to view line comments and any included attachments for that line.

If there is an attachment, you will need to click on the Attached File link to view it.

Click on the **X** in the top right corner to close the window.

Click the arrow (>) at the end of the row.

Back to Header Approval Line Detail

NAPA: NAPA Motor Oil 5W20
57.36 USD

Line Details

Business Unit 00061	Requisition ID 0000021962
Line 1	Item ID
Supplier GENUINEPAR-002	Quantity 24 EA
Price 2.39 USD	Ship To 061MOTP

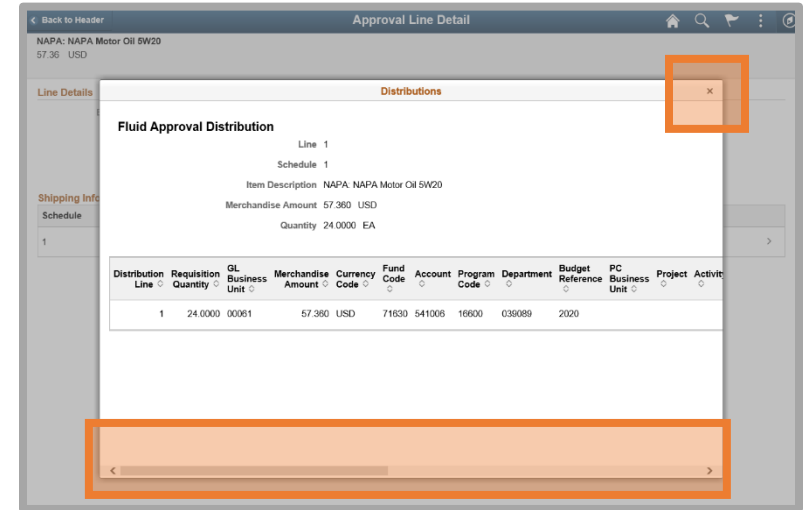
Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	061MOTP	24 EA	2.39 USD	57.36 USD	Helms, Daniel-00061	2019-12-16

A new window will open that contains all chartfields entered for that line.

Use the scroll bar to view all chartfield information entered.

When you are finished with the window, click the **X** in the top right corner.



Click the Back to Header button in the top left corner of your screen to return to the requisition Header page to complete the same process with all other lines on the requisition.



Approver Comments and Approval Chain

Once you have verified the chartfields entered on each line and have returned to the header page, you are ready to approve or deny.

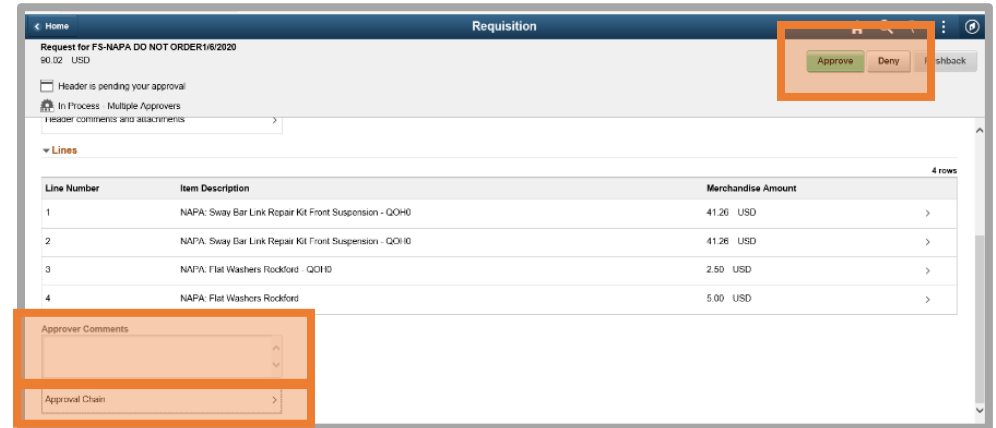
There is a field on the approval page for **Approver Comments** if you want to include any.

You may also want to click on **Approval Chain** to view other people included in approvals for that requisition.

A new window will open with the Approval Chain.

When finished with that window, simply click the **X** in the top right corner.

You are now ready to click **Approve** or **Deny** in the top right corner.

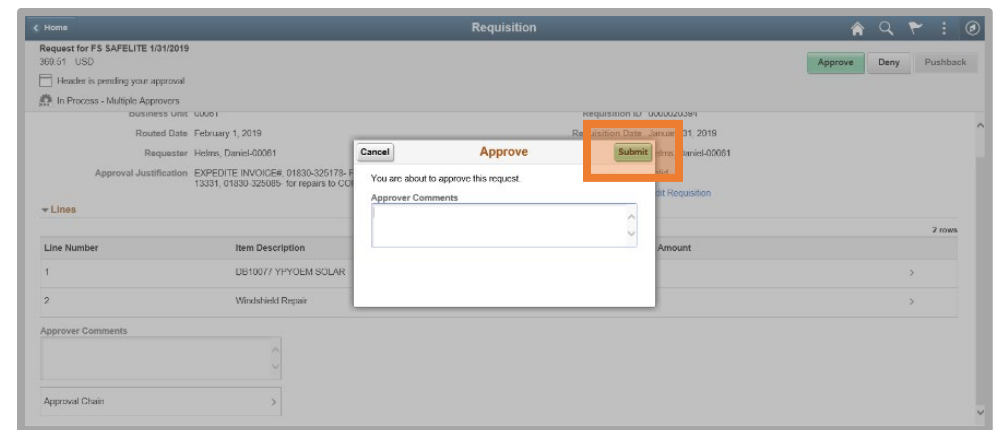


Once you click on **Approve** or **Deny**, a box will open with any Approver Comments you entered or a blank box to give you another opportunity to enter comments, if you would like to enter comments.

If you chose **Deny**, you will be required to enter a comment in order to proceed.

When ready, click the **Submit** button.

If you click the **Cancel** button, Peoplesoft will send you back to the requisition header page.



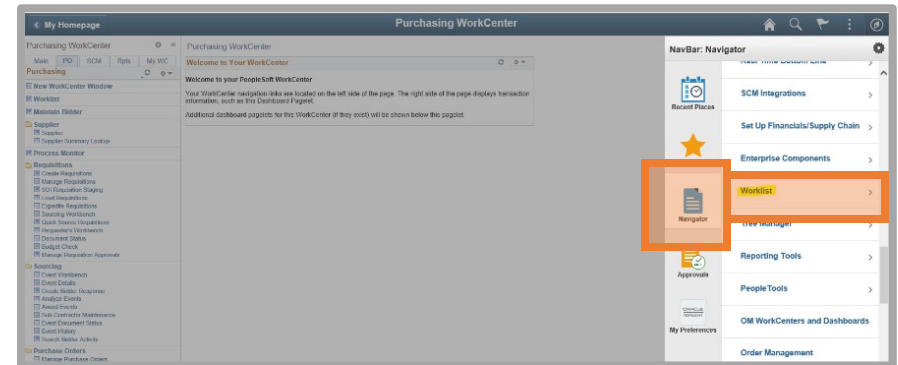
Once you click Approve or Deny and enter comments, Peoplesoft will return to the **Pending Approvals** page, showing only the category of approvals you chose previously.

You are ready to proceed to the next approval.

Requisition	Amount	USD	Description	Priority	Date
215.82	USD	FS-TOM O'BRIEN 948551 - 00061 / 0000020399 Helms, Daniel-00061	Medium Priority	Routed	02/01/2019
2,204.71	USD	FS-SHARP 21/2/2019 - 00061 / 0000020408 Helms, Daniel-00061	Medium Priority	Routed	02/01/2019
1,074.67	USD	FS-GOODYEAR 1/31/2019 - 00061 / 0000020398 Helms, Daniel-00061	Medium Priority	Routed	02/01/2019
947.30	USD	FS-GREENE'S AUTO13/1/2019 - 00061 / 0000020397 Helms, Daniel-00061	Medium Priority	Routed	02/01/2019
484.68	USD	FS-HUBLER 1/31/2019 - 00061 / 0000020396 Helms, Daniel-00061	Medium Priority	Routed	02/01/2019
491.16	USD	Rq-Evt- TC -PO comments test - 00061 / 0000020414 Helms, Daniel-00061	Medium Priority	Routed	04/19/2019
550.00	USD	Tiller - 00061 / 0000020452 Werner, Jeania-061	Medium Priority	Routed	07/09/2019
550.00	USD	Ground Tiller - 00061 / 0000020453 Werner, Jeania-061	Medium Priority	Routed	07/09/2019
10,000.00	USD	Wecc control 3 - 00061 / 0000020454 Werner, Jeania-061	Medium Priority	Routed	07/13/2019

Approving requisitions through Worklist Navigation

You can get to your worklist through NavBar >> Navigator >> Worklist >> Worklist.



When your Worklist opens, find the requisition you wish to review, and click on the blue link.

From	Date From	Work Item	Worked By Activity	Priority	Link
Helms, Daniel-00061	10/31/2018	Approval Routing	Approval Workflow	2-Medium	Requisition: 000077-00061-201808-01-0-0000020408 Helms, Daniel-00061-00061

Header Information

The header information for the requisition will appear, along with all line items on the requisition.

You may wish to click on [Header comments and attachments](#) to view any comments and attachments associated with the requisition header.

When you have finished reviewing, click the **X** in the top right corner of the box. Click the arrow (**>**) at the end of the first row.

Request for FS-NAPA DO NOT ORDER12/16/2019
57.36 USD

Approve Deny Pushback

Header is pending your approval
In Process - Multiple Approvers

Summary

Business Unit 00061 Requisition ID 0000021962
Routed Date December 16, 2019 Requisition Date December 16, 2019
Requester Helms, Daniel-00061 Entered by Helms, Daniel-00061
Approval Justification STOCK INVOICE#009936 Budget Header Status Valid
Origin
[Edit Requisition](#)

More Information

Header comments and attachments >

▼ Lines 1 row

Line Number	Item Description	Merchandise Amount
1	NAPA NAPA Motor Oil 5W20	57.36 USD

Approver Comments

Approval Chain >

Line Details

A new page will open with the Line Details, including [Shipping Information](#), quantities, and pricing.

If a specific line has comments or attachments associated with it, there will be a section titled [More Information](#) under the Shipping Information.

Included in that section will be a box with [Line comments and attachments](#) in it.

Click on it to view line comments and any included attachments for that line.

If there is an attachment, you will need to click on the [Attached File link](#) to view it.

Click on the **X** in the top right corner to close the window.

Click the arrow (**>**) at the end of the first row.

Back to Header Approval Line Detail

NAPA: NAPA Motor Oil 5W20
57.36 USD

Line Details

Business Unit 00061 Requisition ID 0000021962
Line 1 Item ID
Supplier GENUINEPAR-002 Quantity 24 EA
Price 2.39 USD Ship To 061MOTP

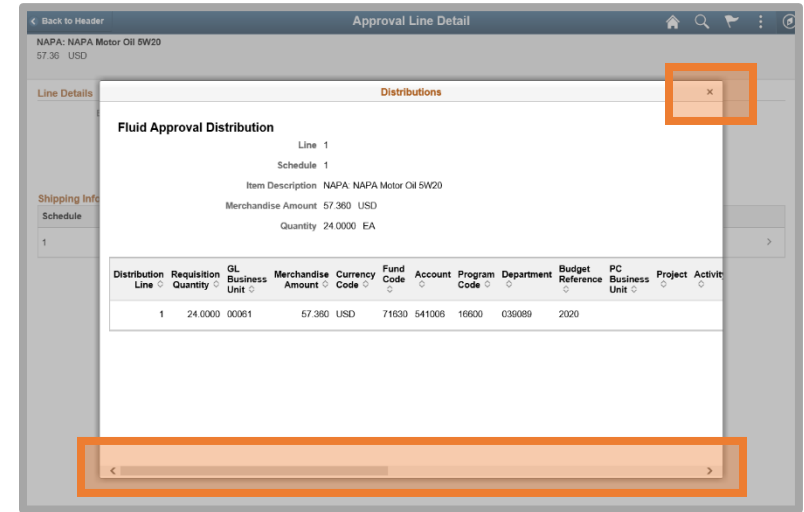
Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	061MOTP	24 EA	2.39 USD	57.36 USD	Helms, Daniel-00061	2019-12-16

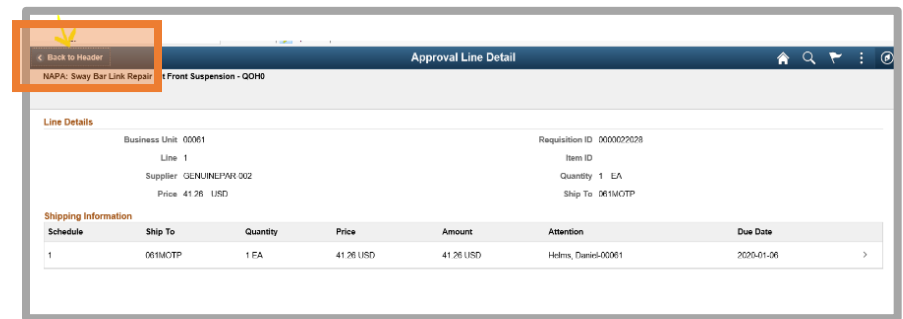
More Information

Line comments and attachments >

A new window will open that contains all chartfields entered for that line.
 Use the scroll bar to view all chartfield information entered.
 When you are finished with the window, click the **X** in the top right corner.



Click the **Back to Header** button in the top left corner of your screen to return to the requisition Header page to complete the same process with all other lines on the requisition.



Approver Comments and Approval Chain

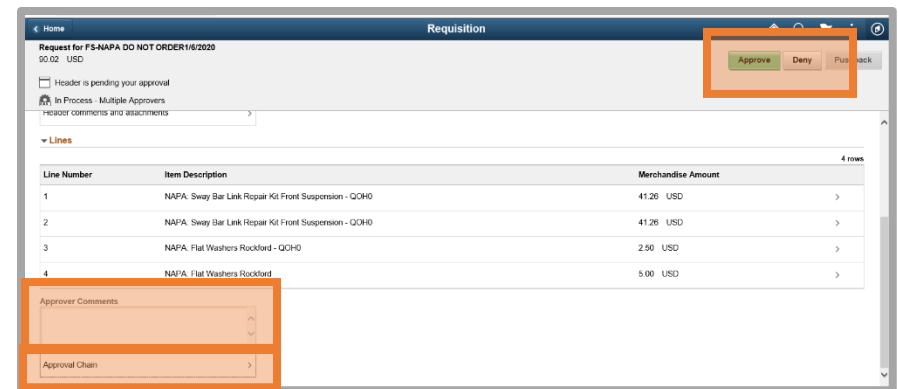
Once you have verified the chartfields entered on each line and have returned to the header page, you are ready to approve or deny.

There is a space on the approval page for comments if you want to include any.

You may also want to click on **Approval Chain** to view other people included in approvals for that requisition.

A new window will open with the Approval Chain. When finished with that window, simply click the **X** in the top right corner.

You are now ready to click **Approve** or **Deny** in the top right corner.

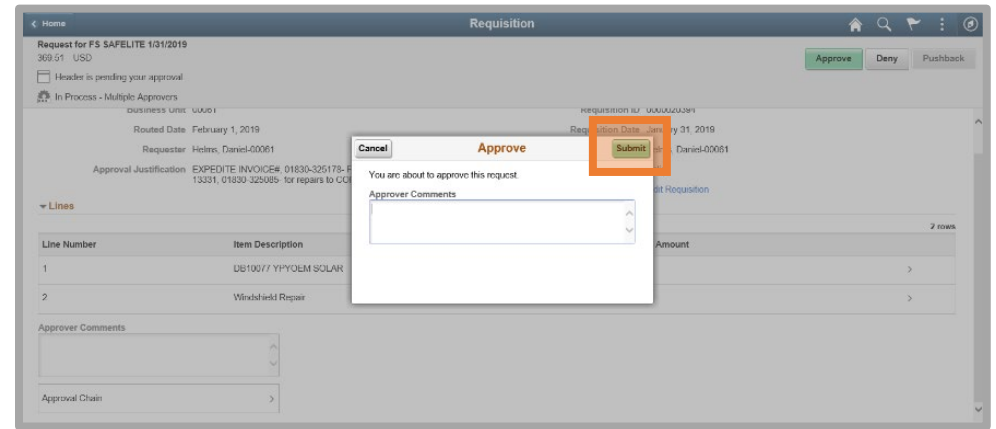


Once you click on Approve or Deny, a box will open with any **Approver Comments** you entered or a blank box to give you another opportunity to enter comments, if you would like to enter comments.

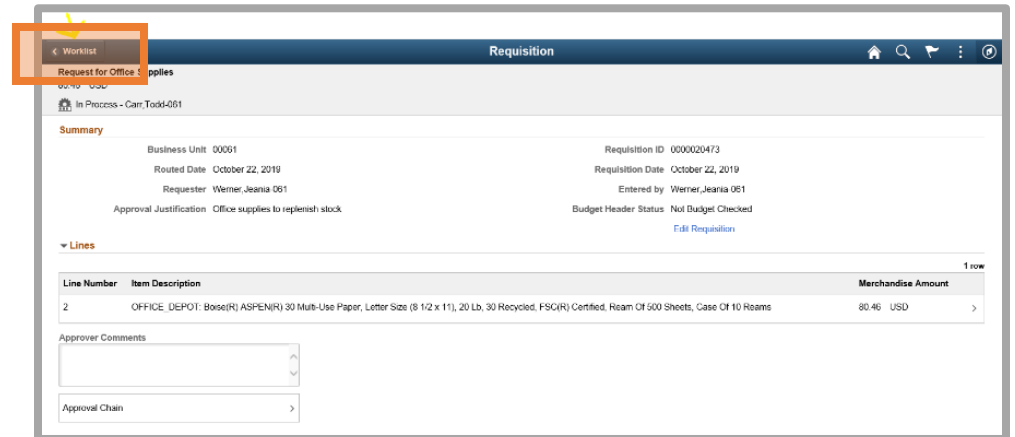
If you chose Deny, you will be required to enter a comment in order to proceed.

When ready, click the **Submit** button.

If you click the **Cancel** button, Peoplesoft will send you back to the requisition header page.



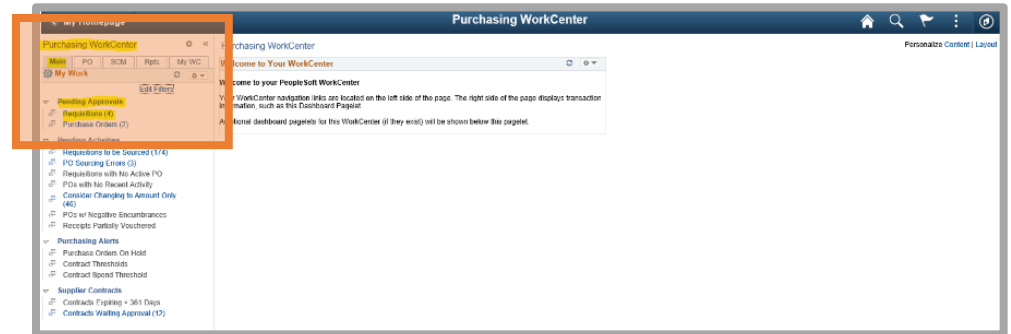
When Peoplesoft returns to the requisition header after you submit your approval, click on the **Worklist** button in the top left corner to return to your worklist.



Approving requisitions through WorkCenter Pending Approvals

Navigation

You can get to the requisitions requiring your approval through the Purchasing WorkCenter Main tab and click on Requisitions under the Pending Approvals heading.

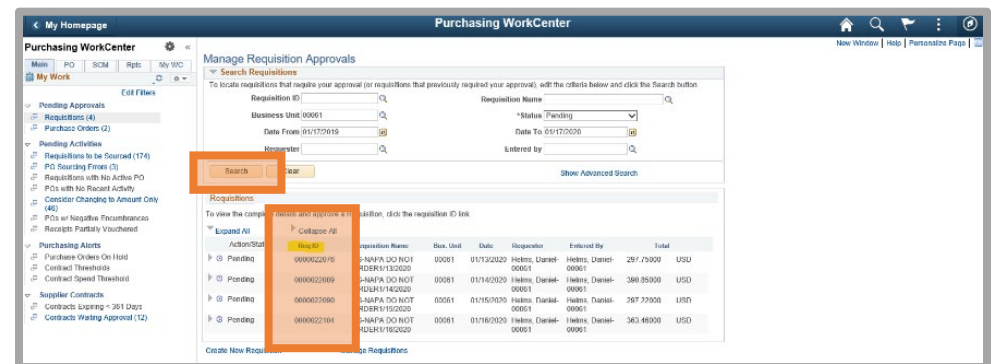


! You may need to change the date parameters that defaulted in the Date From and Date To fields.

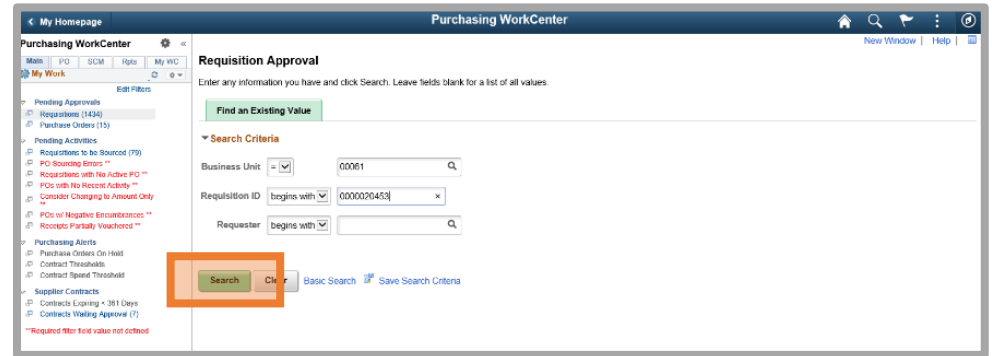
If a list of requisitions does not load, click the **Search** button.

! When using this navigation for req approval, you are required to enter the business unit and requisition number on a subsequent screen. You will need to copy the req number you are going to review.

Click on the blue **Req ID** link of the requisition you want to review for approval.



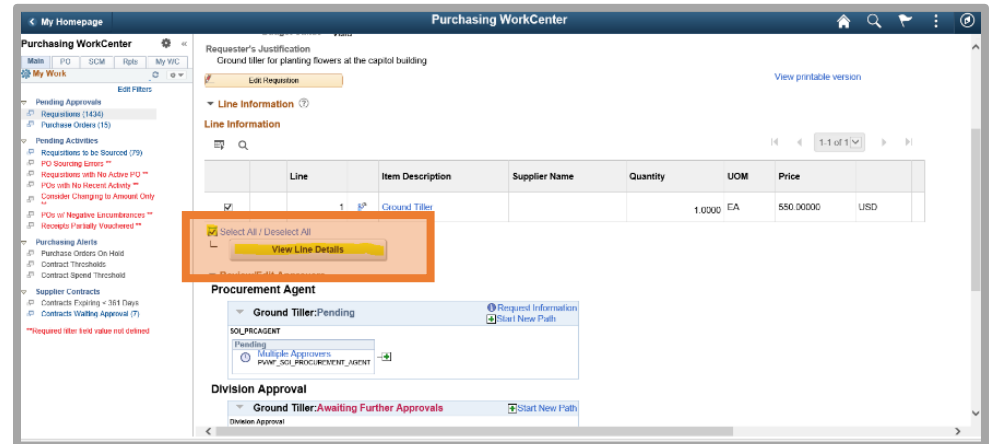
Enter the Business Unit and Requisition ID you copied from the previous screen and click Search.



Requisition Approval Screen

When the Requisition Approval screen opens, you can see the Requester, the Requester's Justification, the Total Amount of the requisition, and the Line Information.

Click the checkbox in front of **Select All / Deselect All** and click **View Line Details**.



Chartfield Information

A new window will open showing the chartfield information associated with each line item on the requisition.

When you are finished reviewing the line items and the associated chartfield information, click the **X** in the top right corner of the window.

The screenshot shows a requisition line item window with the following details:

- Business Unit:** 00061
- Requisition:** 0000020453
- Requisition Name:** Ground Tiller
- Requester:** J005563
- Requested By:** Werner, Jearnia-061
- Entered Date:** 7/9/19
- Status:** Approved
- Currency:** USD
- Requisition Total:** 550.00
- Header Comments:** Ground tiller for planting flowers at the capitol building
- Line 1:** Item Description: Ground Tiller, Quantity: 1.0000, UOM: EA, Price: 550.0000, Line Total: 550.00, Line Status: Approved
- Ship Line 1:** Attention: Werner, Jearnia-061, Ship Via: VENDOR, Ship To: 061PROC, Due Date: 7/23/19, Freight Terms: FOB DEST, Address: IDOA, Procurement Division, 402 W WASHINGTON ST RM W468, INDIANAPOLIS IN 46204, United States, Shipping Quantity: 1.0000, Shipping Total: 550.00

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Processed	061PROC	1.0000	100.00	550.00	00061	555534
		Dept			Program		Budget Ref
		039095			10000		2020
		Open QTY			Open Amt		
		0.0000			0.000		
		GL Base Amount			Currency	AM BU	Profile Id
		550.00			USD	00061	53407
						Sequence	Capitalize
						0	N

Approver Comments

Scroll down below the section that shows all approvers for this requisition to Enter Approver Comments.

If you are approving, you may choose to enter a comment. **If you are denying, a comment is required.**

Click **Approve** or **Deny** based on the results of your review of the requisition information.

The screenshot shows the Purchasing WorkCenter interface with the following details:

- My Homepage** and **Purchasing WorkCenter** tabs are visible.
- Review/Edit Approvers** section is active, showing the requisition details.
- Procurement Agent:** Ground Tiller: Pending, SOLFRAGENT, Pending, Multiple Approvers, PVMF_SOL_PROCUREMENT_ASGHT.
- Division Approval:** Ground Tiller: Awaiting Further Approvals, SOLFRAGENT, Not Routed, Carr, Todd 051, Agency Dept Level 1.
- Fiscal Approval:** Ground Tiller: Awaiting Further Approvals, SOLFRAGENT, Not Routed, Yarr, Mallawa 00061, PVMF_SOL_FISCAL_APPROVAL.
- Enter Approver Comments:** A text input field is highlighted in orange, with **Approve** and **Deny** buttons below it.

Additional requisitions to approve

If you have additional requisitions to review for approval, you may click on **Previous in List** or **Next in List** and follow this set of instructions from the beginning.

If you click on **Return to Worklist**, you will need to follow the instructions for approving from your **Worklist**.

The screenshot shows the 'Purchasing WorkCenter' interface. The main content area is titled 'Requisition Approval' and includes the following sections:

- Confirmation:** A green checkmark icon followed by the text 'paint and paint supplies has been approved.'
- Review/Edit Approvers:** A section titled 'Procurement Agent' with a dropdown menu showing 'paint and paint supplies:Approved'. Below this, a table lists the approver:

Approved
✓ Jamie Sisco - 00061 PWWF_SOL_PROCUREMENT_AGENT 02/19/20 - 11:04 AM
- Division Approval:** A section titled 'paint and paint supplies:Pending' with a dropdown menu. Below this, a table lists the pending approver:

Pending
Cart, Todd-061 Agency Dept Level 1

At the bottom of the page, there are three navigation buttons: 'Return to Worklist', 'Previous in List', and 'Next in List'. The 'Previous in List' and 'Next in List' buttons are highlighted with an orange border.