Indiana Department of Administration | **Procurement Division**

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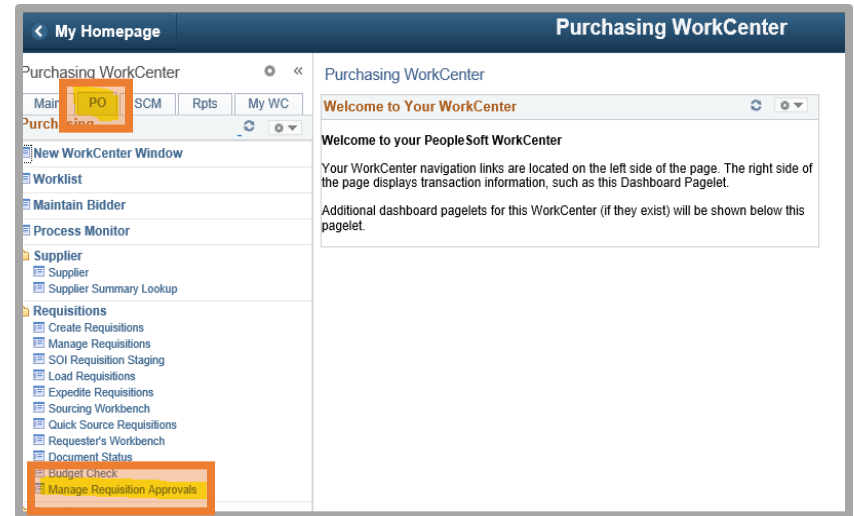
! If you click on the link in your email notification, begin with the **Header Information** step in the following approval methods.

Approving requisitions through Manage Requisition Approvals

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.
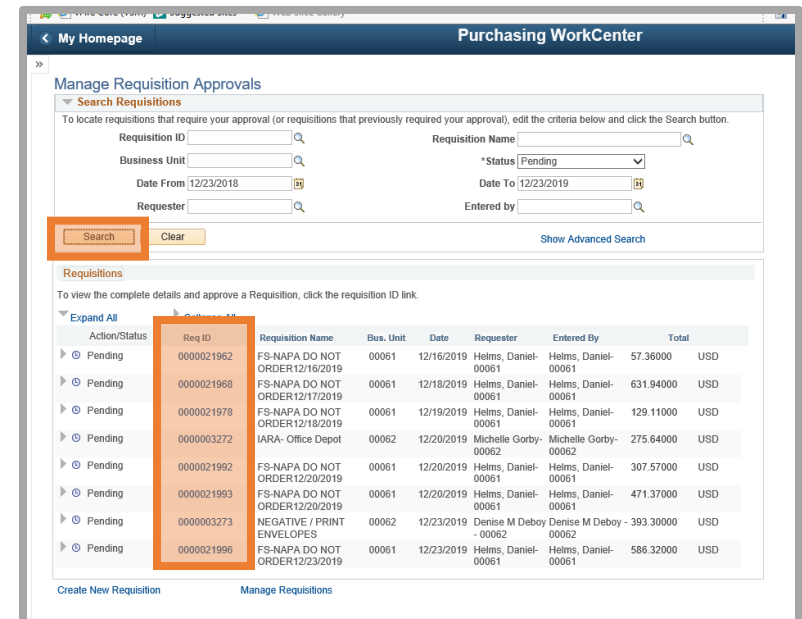
Header Information

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.

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.

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 line to view chartfields entered on the requisition.
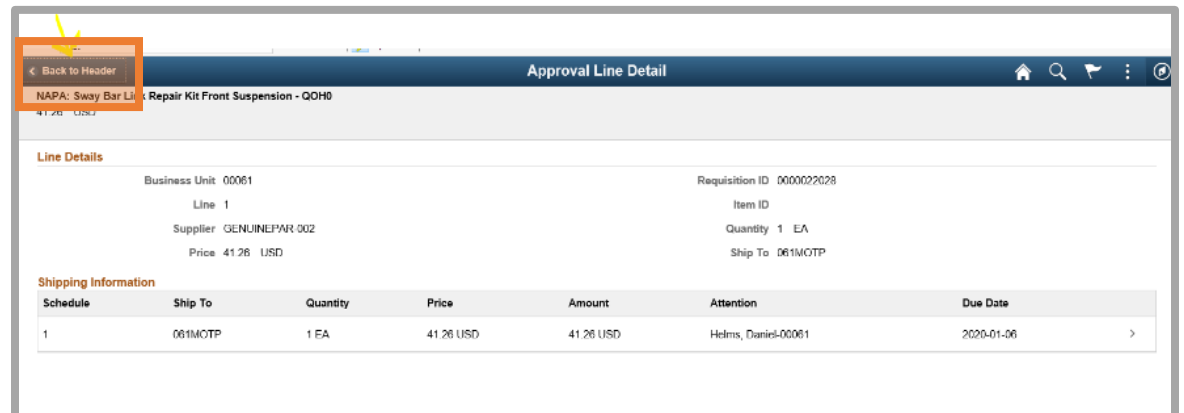
A new window will open that contains the chartfields entered for that line.

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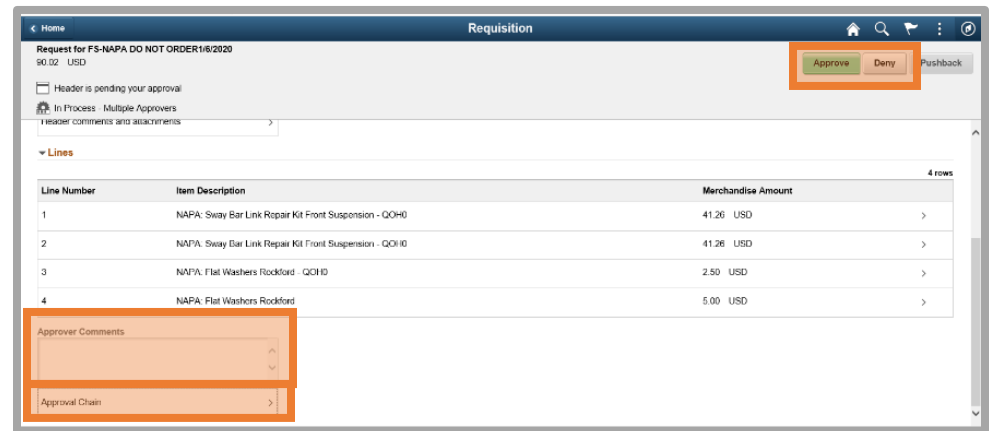
There is a field on the approval page for comments if you want to include any.

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.

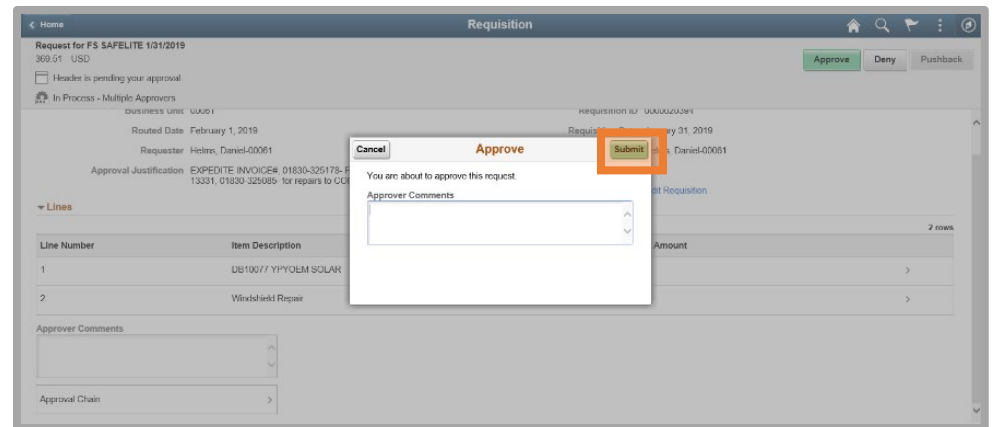When finished with that window, click the **X** in the top right corner.

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.

Approving requisitions through NavBar Approvals

## Navigation

Click NavBar >> Approvals
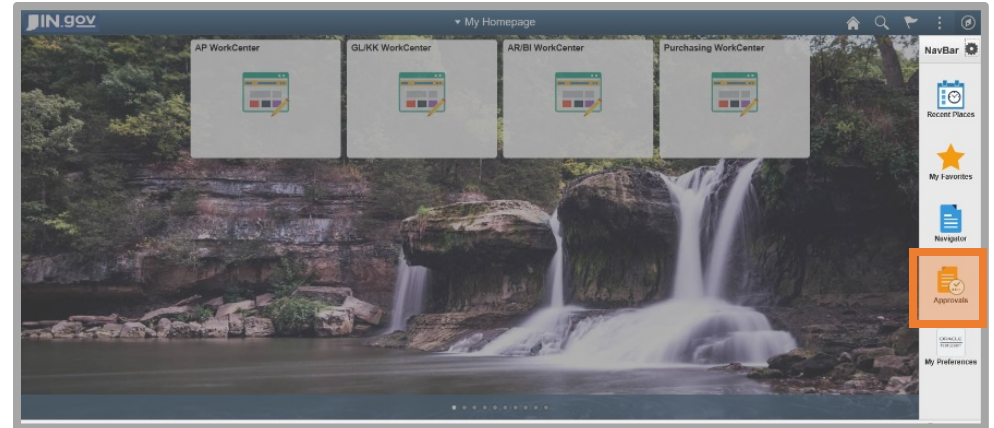
Your screen will display all items in your worklist to approve.

! 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.
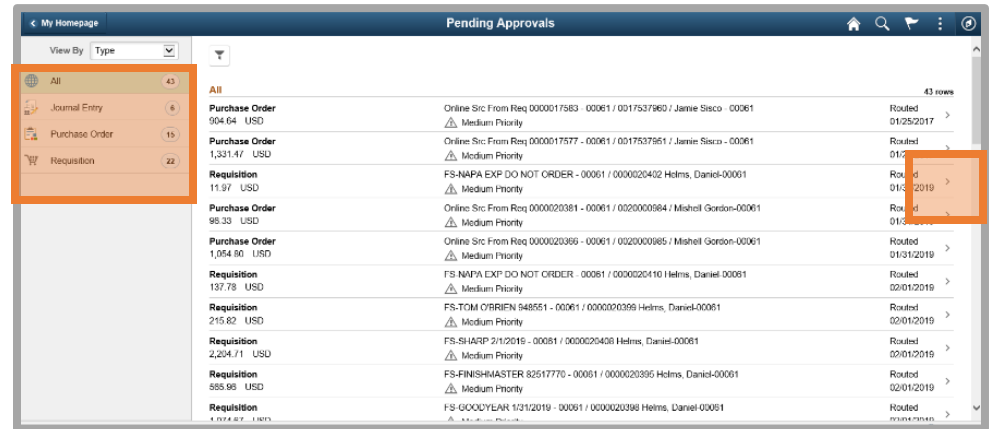
Header Information

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.

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.

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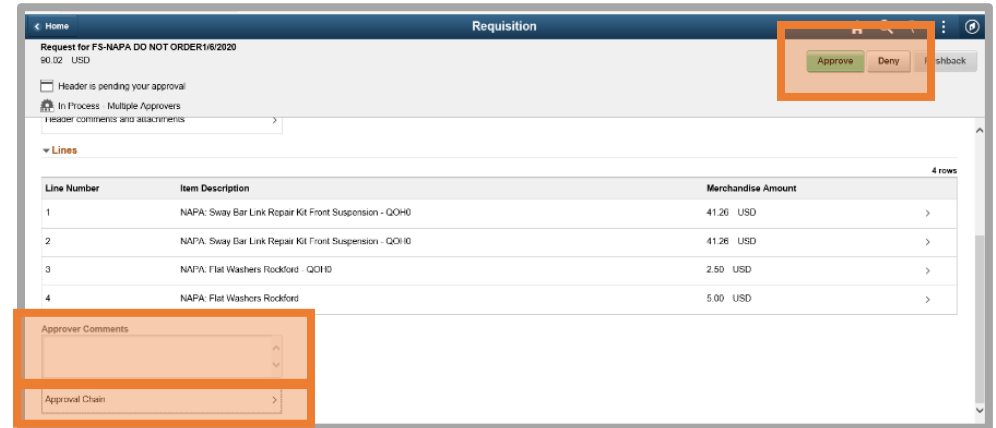
There is a field on the approval page for **Approver Comments** if you want to include any.

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.

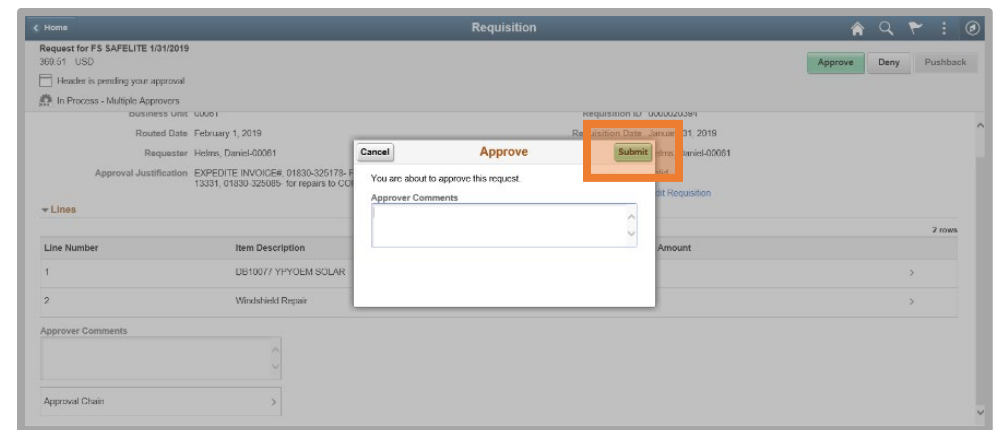You are now ready to click **Approve** or **Deny** in the top right corner.

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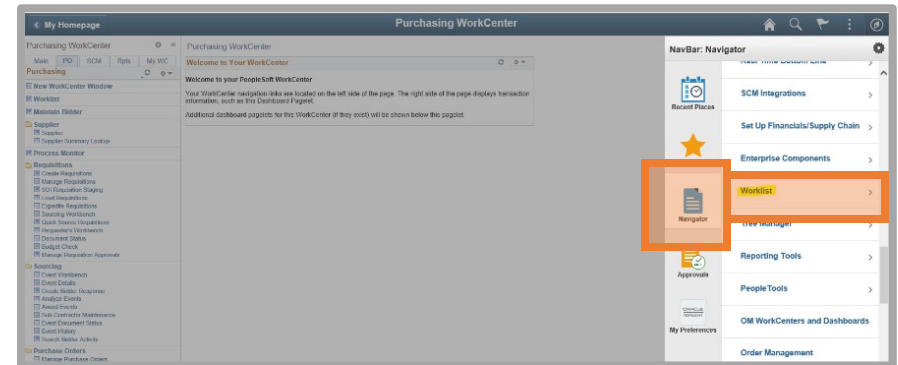
Once you click Approve or Deny and enter comments, Peoplesoft will return to the **Pending Approvals** page, showing only the category of approvals you chose previously.

You are ready to proceed to the next approval.

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.

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.

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.

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.

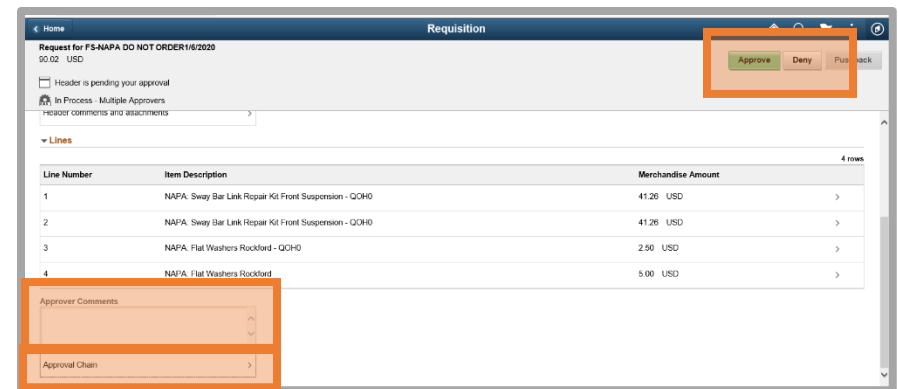## Approver Comments and Approval Chain

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.
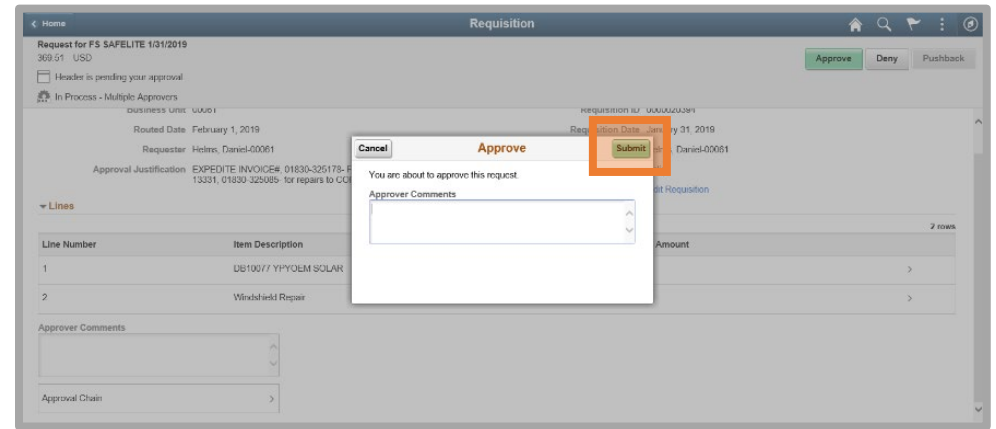
Once you click on Approve or Deny, a box will open with any **Approver Comments** you entered or a blank box to give you another opportunity to enter comments, if you would like to enter comments.
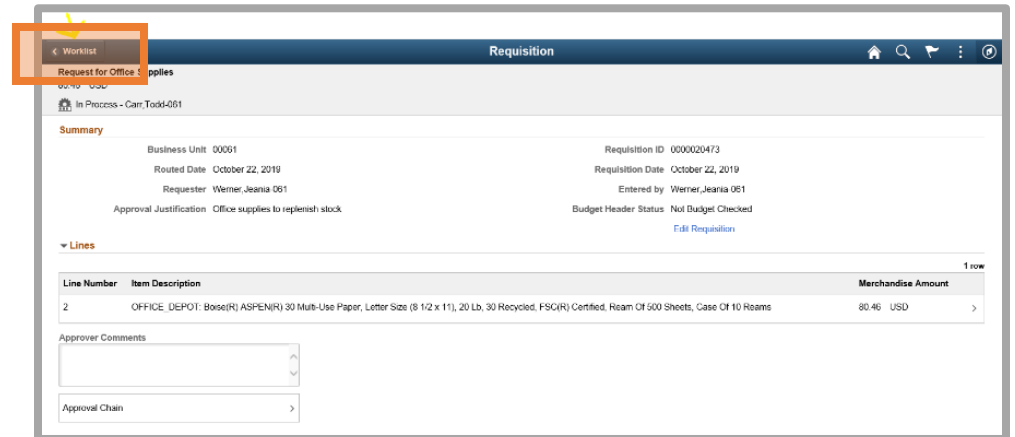
If you chose Deny, you will be required to enter a comment in order to proceed.

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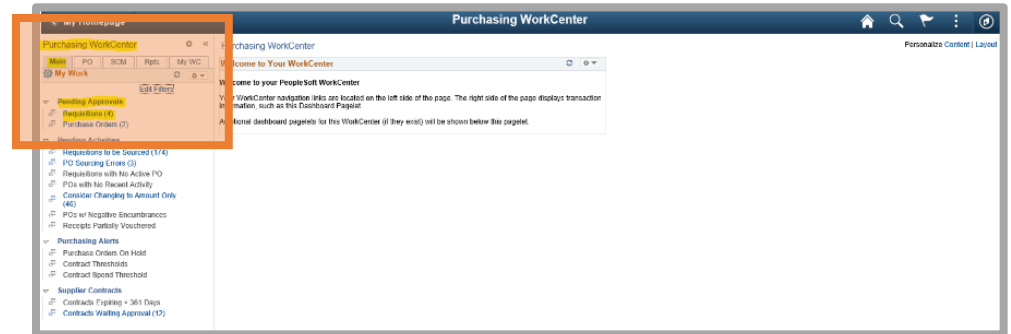
! You may need to change the date parameters that defaulted in the Date From and Date To fields.

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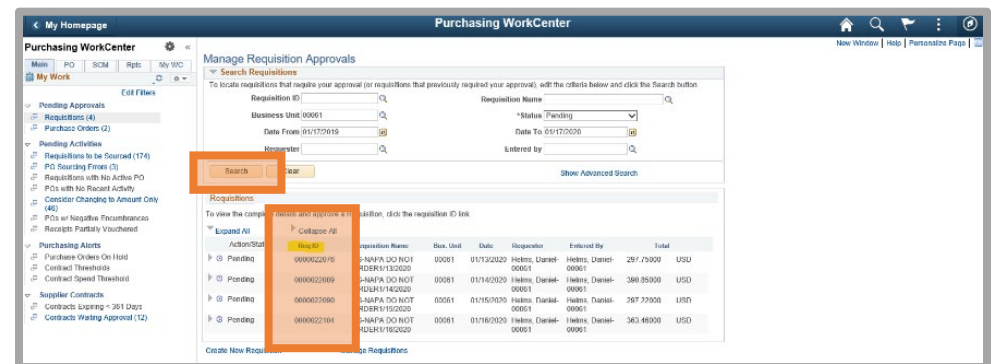
Enter the Business Unit and Requisition ID you copied from the previous screen and click Search.
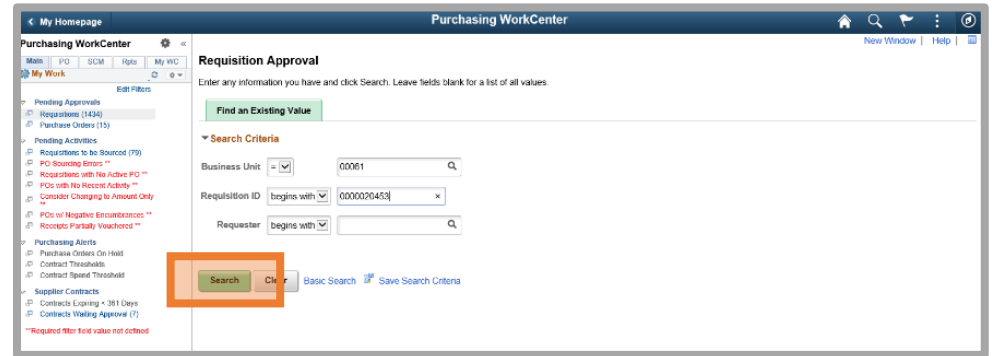
Requisition Approval Screen

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**.
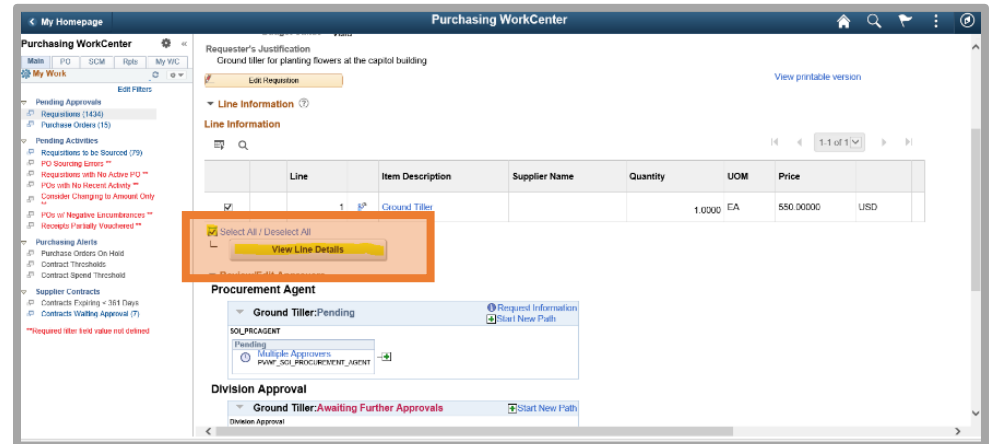
Chartfield Information

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.

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.

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**.