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Course Objectives

In this manual for *PeopleSoft Requisitions: Approval Process*, several procedures are reviewed. These procedures are outlined for those that have Approver authority in PeopleSoft.

Procedures outlined:
- Approving a Requisition via E-mail Notification
- Approving a Requisition via the Manage Requisition Approvals page
- Approving a Requisition via the Worklist
- Reassigning a Requisition
- Assigning an Alternate Approver
Approving a PeopleSoft Requisition

Discussion

If you are an Approver of PeopleSoft Requisitions, you will have a choice as to how you will start the Approval Process. You can start from the e-mail notification you receive, from the new Manage Requisition Approvals page, or via the PeopleSoft Worklist.

Regardless of how you choose to start the approval process, you will eventually be on the same page, from which you will Approve, Deny or Hold a requisition. This is the Requisition Approval page.

Requisition Approval Page:
PeopleSoft Requisitions: Approval Process

If you are both the Requester and the Approver, you will not need to follow this process. The requisition that you save and submit will bypass the Approval Process and move directly to Budget Checking. You only need to follow these procedures to review requisitions submitted to you by people that have you specified as their PeopleSoft Approver.

As an Approver, you have three options available:

- **Approve**: If you Approve a requisition, you are agreeing to all of the contents of the document. You are also moving the requisition to the next step in the Requisition Life Cycle, Budget Checking.
- **Deny**: If you Deny a requisition, you are stopping the requisition from moving to the next step in the Requisition Life Cycle. Denied requisitions will be closed.
- **Hold**: If you Hold a requisition, you are sending it back to the Requester for additional information or modification. Once the Requester responds with information or changes, you will again receive notification and be able to review and approve, or deny once again.

**Note**: See Appendix A for the Requisition Life Cycle.
Approve Requisitions using a Wireless Device

Approvals may only be done using the Rootown wireless network or a direct on-campus connection. If you wish to use a wireless device for approval purposes, the following guidelines apply:

- Smartphones are NOT supported devices for approving requisitions.
- IPads (or other tablet devices) may be used to approve requisitions. Keep in mind, the View Printable Version link on the Approval page will NOT work on a tablet device.
- Your wireless device must be using the Rootown wireless network. Instructions are provided in Appendix B for connecting to Rootown using an iPad.
- Additional instructions for setting up the Rootown wireless network on various devices/operating systems can be found on the Support Desk wiki.

Note: See Appendix B for more information.
Approving a Requisition via E-mail

As an Approver, you will receive an e-mail notification every time a requisition needs your approval. If you get requisition notifications periodically, this method is a good choice for how you will open the requisition for approval. This process will allow you to navigate and open a specific requisition for review and approval directly from the e-mail notification.

1. As the Approver, you will receive an e-mail message indicating that you have a requisition awaiting approval in your PeopleSoft Worklist.

![E-mail notification example]

As the Approver, you will receive an e-mail notification indicating that a requisition is awaiting your approval. The notification includes details about the requisition, such as the request ID, requestor, and requisition name.

2. Click on the link at the bottom of the e-mail message.
3. You will be prompted to log into PeopleSoft, if you are not already logged in. Enter your User ID and Password. The Requisition Approval page displays.

4. To view the requisition, click on the link for **View printable version** in the top right quadrant of the window.

   A separate window will open - **DO NOT close this window.** Closing the window will cancel the report process.

   **Note:** It may take up to 30 seconds for this screen to appear – please be patient and do not click the View Printable Version link a second time.

   You can close the report window when you are finished reviewing the requisition.
5. Add comments in the large edit box prior to selecting an action. Comments are required for Deny and Hold.

![Enter Approver Comments]

---

6. Click on the **Approve**, **Deny** or **Hold** button.

7. If you approved the requisition, a similar page will display:

![ORACLE Requisition Approval Confirmation]

Test Requisition- Software ABC has been approved.

![Approval Process]

The Requester will now receive an e-mail message stating the requisition was approved.
8. If you denied the requisition, a similar message will display:

The Requester will now receive an e-mail message stating the requisition was denied.
9. If you placed a requisition on hold, because the requisition needed revised, you will see a similar page:

The Requester will now receive an e-mail message stating the requisition was put on Hold. For Holds and Denials, requesters are directed to review the Approver’s comments on the Approval Page by clicking the link provided.

Requested action has been taken on requisition ID 0000669115.

Requester ID: TRAIN02
Requestor Name: Training ID
Requisition Name: Test 3: Software 123
Date: 2012-09-09

Please review the requester’s response on the approval page and either approve or deny the requisition. You can navigate directly to the approval page by clicking the link below.

https://advisors-f2.uakron.edu/poa/akrinfhp05/EMPLOYEE/ERP_FRPS/c/PV_MAIN_MENU/PV_REQ_APPROVAL.GBL?Amtrc=GBUSINESS_UNIT=AKRON&REQ_ID=0000669115
10. Once on the Requisition Approval page, the approval path will indicate that this requisition was previously put on hold and will display the comments that were added.
Approving a Requisition via the Manage Requisition Approvals Page

If you approve a large amount of requisitions, it may be time advantageous to use the Manage Requisition Approvals page when you know there are multiple requisitions to be reviewed. A benefit to using this page, that you do not have available using the other methods, is a **Next in List** link that will allow you to quickly advance from one requisition to the next. This page will also be convenient if you are a regular PeopleSoft Financials user and you are in the system frequently. You can quickly navigate to this page to see if any requisitions need your attention.

1. As the Approver, you will receive an e-mail message indicating that you have a requisition awaiting approval in your PeopleSoft Worklist.

   ![Email Message](image)

   **Note:** As previously outlined, you can use the link in the e-mail to go into PeopleSoft for the approval process. You can also, however, go to the Manage Requisitions Approval Page to review requisitions.
2. In PeopleSoft, navigate using the menu to: **Purchasing, Requisitions, Manage Requisition Approvals.**

![PeopleSoft Requisitions: Approval Process](image)

3. Click on the **Search** button to retrieve requisitions awaiting your approval.

![PeopleSoft Requisitions: Approval Process](image)

**Note:** You may have to adjust the search criteria at the top of the page prior to clicking on the Search button.
4. To review a requisition, click on the link for the requisition in the **Req ID** column. The Requisition Approval page displays:

5. To view the requisition, click on the link for **View printable version** in the top right quadrant of the window.

   A separate window will open - **DO NOT close this window**. Closing the window will cancel the report process.

   **Note**: It may take up to 30 seconds for this screen to appear – please be patient and do not click the View Printable Version link a second time.

   You can close the report window when you are finished reviewing the requisition.

6. Add **Comments** in the large edit box prior to selecting an action. Comments are required for Deny and Hold.
7. Click on the **Approve**, **Deny** or **Hold** button.

    The Requester will receive an e-mail message, regardless of the action taken.

8. A benefit to using the Manage Requisition Approvals page is that you have a **Next in List** link available after you take action. This will allow you to automatically move to the next requisition in the list requiring review (without having to return to the list for selection.)

    For example, if the requisition is approved, a similar message will display:

    ![Oracle Requisition Approval](image)

    Click on the **Next in List** link to advance to the next requisition for review.

9. The next requisition, from the list, will return for your review.

    ![Oracle Requisition Approval](image)

    Continue with the Approval Process.
Approving a Requisition via Worklist

If you approve a large amount of requisitions, it may be time advantageous to use the Worklist when you know there are multiple requisitions to be reviewed. This page would be convenient if you are a regular PeopleSoft Financials user and you are in the system frequently. You can quickly navigate to the Worklist to see if any requisitions need your attention.

1. As the Approver, you will receive an e-mail message indicating that you have a requisition awaiting approval in your PeopleSoft Worklist.

   ![Image of email message]

   **Note:** As previously outlined, you can use the link in the e-mail to go into PeopleSoft for the approval process. You can also, however, go directly to the Worklist in PeopleSoft to review requisitions.

2. To open the Worklist, click on the **Worklist** link in the Navigation Header in the top right of the PeopleSoft window.
3. Your Worklist will open and will display requisitions awaiting your approval.

4. To review a requisition, click on the link for the requisition in the Link column.

The Requisition Approval page displays:
5. To view the requisition, click on the link for **View printable version** in the top right quadrant of the window.

   A separate window will open - **DO NOT close this window.** Closing the window will cancel the report process.

   **Note:** It may take up to 30 seconds for this screen to appear – please be patient and do not click the View Printable Version link a second time.

   You can close the report window when you are finished reviewing the requisition.

6. **Add Comments** in the large edit box prior to selecting an action. Comments are required for Deny and Hold.

7. Click on the **Approve**, **Deny** or **Hold** button.

8. The Requester will receive an e-mail message, regardless of the action taken.

9. To return to the Worklist, click on the **Worklist** link in the Navigation Header at the top of the page, from the Worklist option in the breadcrumbs, or the link below the action buttons.
Reassigning a Requisition

At times, Approvers may need to reassign a requisition to a different approver when alternate SpeedCharts are used. This process is for sending select requisitions to others for approval.

Note: The Approver you want to send the requisition to MUST already be specified in PeopleSoft as an Approver.

1. Go to the Requisition Approval page for the requisition you want to reassign.
2. Click on the **Insert Approver** button.

If you know the User ID of the Approver, enter it into the **User ID** field.

3. If you do not know the User ID, click on the **Lookup** button.

In the **Name** field, enter the last name (or part of the last name) of the Approver and click on the **Search** button.

From the returned list, select the person. The Name will now display in the User ID field.
4. Click on the **Insert** button.

5. It is not required, but it is recommended, that you enter a comment in the **Enter Approver Comment** box so that the new Approver knows why this requisition has been routed to them for approval.

6. Click on the **Approve** button to reassign the requisition.
Assign an Alternate Approver (for set time period)

At times, Approvers may need to completely reassign requisitions to a different Approver for a set period of time, such as for a vacation. This process is for sending ALL requisitions to another Approver for review.

There are several guidelines that you must consider before making this change:
- The Alternative Approver must be an authorized Approver in PeopleSoft.
- The To and From dates must be specified when completing the change.
- The current Approver MUST make these changes while logged in to PeopleSoft. Other users cannot make this change. If the Approver is already out of the office, the Department of Purchasing needs to be contacted at extension 7340.

1. From the Main Menu, select **My System Profile**.
2. In the **Alternate User ID** field, enter the ID of the person that will temporarily approve your requisitions.

If you do not know the ID, click on the **Lookup Alternate User ID** button.

3. You can search by the first part of the UserID or by Description. Using the option for Description will allow you to search by last name.

   **Change the Search by field to Description to search by last name.**

   Click on the **Look Up** button.

4. The search results will display:

   **Select the person from the list to return.**
5. The General Profile Information page displays again.

6. You must enter a **From Date** and a **To Date**. You can type the dates or you can use the **Choose a Date** button.

7. Scroll to the bottom of the page and click on the **Save** button.

8. The requisitions will now be routed to the alternative approver for the specified time period.
Appendix A: Requisition Life Cycle

Prior to Budget Checking (Commitment Control), your requisition will have a status of:

**Not Chk’d:** Has not been Budget Checked yet.

**Valid:** Successful Budget Check.

**Error:** Failed Budget Check.

An Approver can do the following when reviewing a requisition:
- Approve
- Deny
- Hold (Send back for changes)

Common Statuses for requisitions:
- Approved
- Denied
- Hold
- Pending
- Approval
- Canceled

STEP 1
Requester Creates a PeopleSoft Requisition.

STEP 2
Authorized Person Approves the Order.

STEP 3
The Requisition is Budget Checked (Commitment Control).

STEP 4
Purchase Order is Automatically Created.

STEP 5
The Purchase Order is Dispatched IF approved by Department. Of Purchasing

STEP 6
Goods or Services Received and Invoice is Received.

STEP 7
Voucher Created and Vendor is Paid.

Voucher means “okay to pay.”
Appendix B: Approving Requisitions using Wireless Devices

Connect an iPad to the rootown Network

The following steps demonstrate the process of changing the Network specified on the iPad. In order to access certain applications, such as PeopleSoft, you must be using the University of Akron wireless network, rootown.

1. Tap **Settings**.
2. Tap **Wi-Fi**, if it is not already selected.
3. Make sure Wi-Fi is set to **On**. Under Choose a Network, tap **rootown**. Note: If you don’t see **rootown** listed, continue to Step 5.
4. After a few seconds, a checkmark should appear next to rootown. You are now using the rootown wireless network.
5. If this is the first time you are using the rootown network, you will need to follow a few additional steps. Under choose a Network, tap **Other**.

6. In the Name field, type **rootown**. Tap **Security** and select **WPA2 Enterprise** and then tap **Other Network** to return to the previous screen.

7. Enter your UAnetID and password in the username and password fields.

8. Tap **Join**. You are now connected to the rootown wireless network.