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Course Objectives

This is the PeopleSoft Version 9.2 Requisitions Manual. This manual will review the following topics:

- Contact information for PeopleSoft and Purchasing related questions
- High level review of the various methods of purchasing goods and services
- Overview of the Life Cycle of a PeopleSoft Requisition
- Creating PeopleSoft Requisitions
- Printing PeopleSoft Requisitions
- Recalling a PeopleSoft Requisition
- Inquiring on a PeopleSoft Requisition
- Working with Invoices

The Financials Intro New User course is a highly recommended pre-requisite for this course. The PeopleSoft Requisition New User course does not cover the basics of how to use the PeopleSoft Financials system. Also, if your job requires the running of Budget Reports, Software Training Services also provides an online course titled Budget Reports and Inquiry: New User.

Security

To obtain security to PeopleSoft Requisitions, first you must complete online training. Once training has been completed, go to the online security form and complete as necessary. This form can be accessed at:

https://footprints.uakron.edu/secure/ps/
Lesson 1: Contact Information

PeopleSoft Contacts

<table>
<thead>
<tr>
<th>Office</th>
<th>Contact Information</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Desk</td>
<td><a href="mailto:supportdesk@uakron.edu">supportdesk@uakron.edu</a> OR 330.972.6888</td>
<td>Answers general questions about PeopleSoft processes and non-PeopleSoft computer processes, opens work tickets for technicians, and assists with UANet password issues. Contact if you forget your PeopleSoft password or ID</td>
</tr>
<tr>
<td>Purchasing Questions</td>
<td><a href="mailto:Purchasing@uakron.edu">Purchasing@uakron.edu</a> OR See next page for listing of contacts in the Department of Purchasing.</td>
<td>Answers specific business process questions about purchasing goods or services.</td>
</tr>
<tr>
<td>Software Training</td>
<td><a href="mailto:pstrain@uakron.edu">pstrain@uakron.edu</a></td>
<td>Answers “how to” questions about the PeopleSoft processes outlined in this manual.</td>
</tr>
</tbody>
</table>

PeopleSoft Web Sites

<table>
<thead>
<tr>
<th>Office</th>
<th>Web Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer Help Desk</td>
<td><a href="http://www.uakron.edu/support-desk/">http://www.uakron.edu/support-desk/</a></td>
</tr>
<tr>
<td>PeopleSoft Security Access Form</td>
<td><a href="https://footprints.uakron.edu/secure/ps/">https://footprints.uakron.edu/secure/ps/</a></td>
</tr>
<tr>
<td>Software Training Services</td>
<td>Main Site: <a href="http://www.uakron.edu/training/">http://www.uakron.edu/training/</a></td>
</tr>
<tr>
<td></td>
<td>PeopleSoft Training: <a href="http://www.uakron.edu/training/PsoftFin.dot">http://www.uakron.edu/training/PsoftFin.dot</a></td>
</tr>
<tr>
<td></td>
<td>Online Course Listing: <a href="https://www.uakron.edu/training/secure/course-listing.dot">https://www.uakron.edu/training/secure/course-listing.dot</a></td>
</tr>
<tr>
<td>University of Akron’s Department of Purchasing</td>
<td><a href="http://www.uakron.edu/purchasing/">http://www.uakron.edu/purchasing/</a></td>
</tr>
</tbody>
</table>
Purchasing Contacts

Below is a contact list for The Department of Purchasing. This list also includes a summary of the commodities that each buyer is associated with. This list is just a summary and does not include every category available on campus. This list is meant to be a guide to help direct you to the appropriate person.

<table>
<thead>
<tr>
<th>Name</th>
<th>Contact Information</th>
<th>Position/Commodity</th>
</tr>
</thead>
</table>
| Andy Roth     | Ext. 7340           | Director, Purchasing
                  | PeopleSoft Functional Lead                                                         |
| Denise Cool   | Ext. 6270           | **Associate Director, Purchasing**
                  | Appraisal Services, Audit Services, Automotive Parts & Supplies, Bearings, Belts, Power Transmission, Flowers, Lease/Purchase Other Equipment, Medical Expenses, Moving & Household Relocation, Musical Equipment over $5000, Office Space - Off Campus Rent, Purchase for Resale – Alcohol, Royalty Fees and Copyrights, Space, Exhibit Rental, Tents & Tarpaulins, Theatrical equip over $5000 |
| Bill Jenkins  | Ext. 6469           | **Assistant Director, Purchasing**
                  | Construction Services, Furniture                                                   |
| Matthew Beaven| Ext. 6268           | Risk Management, Insurance, Credit Card Administration                             |
| Vicki Collins | Ext. 5420           | Assistant Buyer                                                                    |
| Luba Cramer   | Ext. 6272           | Comp Hardware & Software Lease, Computer Components
<pre><code>              | &lt;$5000, Computer Hardware Maintenance, Computer Server/Equip- &gt; $5000, Computer Software, Computer Software Maintenance, Computer-PC's &gt;$5000, Copper Cable &amp; Hardware-Matsl, Data Commun &amp; Internet Access, Data Processing, Disposal Services, Dry Cleaning and Laundry Svc, G3R Telecom Equip, Grant Equipment $1500-$4999, Laboratory Equip-over $5000, Lease/Purch Computer Equipment, Medical Equipment over $5000, Radio Equipment over $5000, Rental-Comp Hardware&amp;Software, Service &amp; Maintenance Contract, Telephone Station Equipment, UA Built Equipment, Uniforms |
</code></pre>
<p>| Barbara Fuller| Ext. 6013           | Credit Card Administration and Training                                            |
| Valoree Lee   | Ext. 5965           | Artists, Entertain/Performers, Catering &amp; Event Services, Consulting Services, Envelopes, Office Supplies, Paper, Research Sub-contract, Security and traffic control, Traffic/Parking equip &gt; $5000 |</p>
<table>
<thead>
<tr>
<th>Buyers and Assistants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sue McPherson Ext. 5423</td>
</tr>
</tbody>
</table>
Lesson 2: Requisition Overview

Methods of Purchasing

The Department of Purchasing offers several different purchasing programs for use by the individual departments on campus. The method you use will vary depending on what you are trying to purchase. See the following table for details.

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft Requisition</td>
<td>Use PeopleSoft whenever you are ordering from external Suppliers (off-campus).</td>
</tr>
<tr>
<td>On-Campus Order Form</td>
<td>An online form that allows users to order items or services from on-campus “suppliers.” For example: Computer Store, Physical Plant (PFOC), Telecommunications, Dining Services and Printing Services. You must obtain access to use the On-Campus Order Form. Please contact the Department of Purchasing for access at x7340 or <a href="mailto:purchasing@uakron.edu">purchasing@uakron.edu</a>. To enter an On-Campus Order (after you obtain access) go to the following url: <a href="https://www.uakron.edu/forms/purchasing/OC/">https://www.uakron.edu/forms/purchasing/OC/</a></td>
</tr>
<tr>
<td>Direct Payment Form</td>
<td>A form, available on the Department of Purchasing web site, which can be used to order books, subscriptions, memberships, and pre-paid conference registrations. After the form is filled out, it can be mailed to Accounts Payable for payment. This process is also used for minor personal reimbursements. The form can be found at the following: <a href="https://www.uakron.edu/forms/purchasing/DP">https://www.uakron.edu/forms/purchasing/DP</a></td>
</tr>
</tbody>
</table>

Note: For reimbursements of $25.00 or less, complete the form and take directly to the Cashiers Window in Simmons Hall.
<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Contract</td>
<td>University Contracts are negotiated and awarded by the Department of Purchasing. All University departments are able to utilize these contracts to procure any item associated with the contract. Place your order directly with the contract supplier and have the invoice sent directly to you for approval. Once you receive the invoice, verify that you received the goods or services. If you received the desired goods or services mark the invoice “OK to Pay”, sign the invoice, write down the SpeedChart you wish to charge and forward the invoice to Accounts Payable for processing and payment. A list of Suppliers the university has contracts with can be found on the Department of Purchasing web site.</td>
</tr>
<tr>
<td>Blanket Purchase Order</td>
<td>A blanket purchase order is when an agreement is reached with a Supplier for a certain period of time, and for a certain amount of money (just encumbered). The department can utilize the blanket purchase order when working with the Supplier. Obtain an invoice for the goods or services provided. Verify the information on the invoice is correct, sign it and indicate that it is &quot;ok to pay&quot; and forward to Accounts Payable for payment processing.</td>
</tr>
</tbody>
</table>
| Office Supplies – ESM EasyPurchase | For more information visit: http://www.uakron.edu/purchasing/facultystaff/office-supplies.dot  
Contact Valoree Lee at extension 5965 if you have questions.  
**Note:** Paper ordering is done through Central Stores.                                                                                     |
| Procurement Card                   | The Procurement Credit Card allows departments to purchase certain goods costing less than $1,500. The cardholder is required to know and follow the guidelines for using the credit card.  
For more information visit: http://www.uakron.edu/purchasing/facultystaff/procurement-card.dot  
Contact Barb Fuller, Procurement Card Administrator at extension 6013.                                                                 |
Requisitions Defined

A requisition is a request for supplies, items, or services from one or several suppliers. As outlined on the previous pages there are several methods for requests of goods or services, and PeopleSoft is used for off-campus purchases.

There are many guidelines involved when making purchases on behalf of the University. The most important rule to remember is that all purchases (unless you are using another Purchasing Program) should be initiated with a requisition and must be approved by the authorized individual.

The Board of Trustees Guideline (3359-03-01) states the following:

“Contracts involving the expenditures of money within the limits fixed by board appropriation may be made on behalf of the university by the president, vice president for finance and administration and chief financial officer, director of purchasing, or senior vice president and provost and chief operating officer, within the scope of their authority, as set forth in the bylaws and regulations of the board.”

Please contact the Department of Purchasing if you have any questions regarding this guideline or if you have general questions about what purchasing program should be used.
Life Cycle of a Requisition

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

### Prior to Budget Checking
Your requisition will have a status of:
- **Not Chk'd**: Has not been Budget Checked yet.

### Budget Checking
- **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**
- **Complete**

**NOTE**: Each step in the process is contingent upon the previous step.

### 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 reviewed and IF approved, dispatched by Purchasing Department.

### STEP 6
Goods or Services Received and Invoice is Received.

### STEP 7
Voucher Created and Supplier is Paid.

**NOTE**: Voucher means “okay to pay.”

**Dispached**: Means the order has been sent to the Supplier by phone, mail, or fax. Order is “official.”

**Voucher**: Means “okay to pay.”
Lesson 3: Adding a New Requisition

Discussion

Starting Notes for Adding Requisitions

Listed below are some general guidelines that you will want to follow when adding a requisition in PeopleSoft.

- Training is required for new PeopleSoft Requisition Users. To access the Security Form, navigate to the following:
  https://footprints.uakron.edu/secure/ps/

- Do not use the Back button on the Internet Explorer Toolbar. Use the buttons found on the PeopleSoft page to move from page to page.

- Requisitions should not be entered until they are ready to be processed. Do not add a requisition and then delay processing as this creates a problem for the Department of Purchasing.

Information Needed for Completing a Requisition

Listed below is information you will need in order to successfully complete a requisition in PeopleSoft. The list is in the order in which you will enter information for your PeopleSoft Requisitions.

1. **What are you buying:** Description, Quantity, Unit of Measure, Category, and Price
2. **Supplier** Name or Number
3. **Due Date** for the items
4. **SpeedChart:** 6-digit number (previously referred to in PeopleSoft as SpeedType)
5. **Comments:** The ReqDeli Standard Comment (contact and delivery information) as well as anything you want to tell the Approver, Buyer, or Supplier.
**Entering a Basic Requisition: One Supplier, One SpeedChart**

Use this process to enter a PeopleSoft requisition when you are using one Supplier and one SpeedChart for all line items.

**Step by Step**

1. From the Main Menu, choose: **Purchasing, Requisitions, Add/Update Requisitions**

![Image of Main Menu]

2. On the Add a New Value tab, click on the **Add** button.

![Image of Add a New Value tab]
3. The Maintain Requisitions page displays:

![Image of Maintain Requisitions page]

**Note:** You can use the Tab key to move from field to field.

4. You will begin to enter information for the Requisition on this page.

**Requisition Name:** You can create your own name for the requisition which will aid in the searching of this order at a later time. Enter a name for the requisition which can be a combination of letters and numbers that will give meaning to this order.
5. **OPTIONAL STEP**: (Adjusting the Routing for Multiple Approvers)

To make a change from the default Approver, you change the **Requester** field.

**Note**: The additional Approver(s) MUST have been specified when applying for your PeopleSoft Requisition Security in order for this set-up to be in place for use.

Click on the **Requester Lookup** button.

*Requester:*

```
TRAIN01
```

Select from the list, the name of the person that you want to route this requisition to.

**Message**

Changing Requester will change the default settings

- ShipTo ID to RECEIVING
- Origin to CNL
- Location Code to LRNRECDTR
- OL Business Unit to AKRON
- Relocate to existing lines? (101, 50, 147)

Changing Requester will change the default setting like ShipTo ID, Location, Origin,Department ID, Account and other Chart fields. Click 'Yes' to override the default values from Requester to the existing lines? Click 'No' to change only the default setting. Click 'Cancel' to reset the Requester to the previous value.

Click on the **Yes** button to return to the Requisition page.
6. Continue to enter information for the requisition.

   At the bottom of the page, in the Line frame, the following fields need to be completed, similar to the following:

   ![Image of requisition form]

   a. **Item**: Leave blank

   b. **Description**: Enter a specific description of the item such as an ID number, Page, SKU#, Catalog #, etc.

   c. **Quantity**: Enter the requisition quantity.

   d. **UOM**: Unit of Measure. Use the **Look Up** button to return a Unit of Measure list. Once you locate the measure, select it to return.

   ![Image of lookup window]
e. **Category**: Use the **Look Up** button to return a list of Categories. Locate the correct Category and click on any link of the Category to select it and return to the Requisition page. This field is linked to the Buyer and the Department’s Budget. *In addition to searching by description you can search by Account.*

   ![Look Up Category](image)

   **Note**: Check the View Tools to verify you are seeing all search results.

f. **Price**: Price per Item.
g. **Amount**: Will automatically calculate, you cannot enter anything in this field.

7. To enter additional items to this requisition, click on the **Add** button at the end of Line 1.

   ![Add Row](image)

Enter the number of rows that you want added to the requisition and select **OK**.

If needed, you can add additional rows later in the process.

8. To delete a line item, go to the end of the line you want to remove and click on the **Delete Row** button.

   ![Delete Row](image)

Click on the **OK** button to delete the selected row.
9. After you have entered the line items, click on the **Requisition Defaults** link.

10. The Requisitions Defaults page displays. This is where you will enter the **Supplier**, **Due Date** and **Speed Chart**.

    The only data that needs to be completed are the three items noted above, no other data should be entered on this page.
11. In the **Supplier** field, enter the Supplier ID number.

**Note:** If the Supplier is unknown or if the Supplier is not contained within the PeopleSoft database, leave the Supplier field blank and it will default to 0000001342 (Department of Purchasing).

To search for a Supplier, click on the **Look Up Supplier** button.

![Look Up Supplier](image)

In the **Short Supplier Name** field, enter the first few letters of the Supplier name and click on the **Look Up** button. The Short Supplier Name is typically the first 10 letters/characters of the company name.

Locate the Supplier, and click on any of the fields (links) to select that Supplier.

12. The Requisition Defaults page returns again.

In the **Due Date** field, enter a realistic due date for the order. You can click on the **Choose a Date** button to return a calendar for easy date selection.

![Choose a Date](image)
13. In the **SpeedChart** field, enter the department’s 6-digit SpeedChart (aka: SpeedType).

Click on the **Refresh** button to populate the required Chartfield information in the Distributions frame at the bottom of the page.

![Distributions frame](image)

**Note:** The SpeedChart will now be blank.

14. You do not need to enter any additional information on this page. If you enter information into the blank fields, your requisition may error and not move to the next step in the Requisition Life Cycle.

The Requisition Defaults page should look similar to the following:

![Requisition Defaults page](image)

After you entered the default information (Supplier, Due Date and SpeedChart), click on the **OK** button.
15. Before you return to the Requisition Home Page, a page displays that requires action.

Click on the **Mark All** link to activate the checkboxes, in the **Apply** column, for all rows of data.

**NOTE**: The result of clicking on the **Mark All** link will be a checkmark in all checkboxes in the **Apply** column. *If you do not follow this step correctly, you will not be able to save the requisition.*

Once the boxes are all checked, in the Apply column, click on the **OK** button to continue.
16. The Requisition page displays again.

17. **OPTIONAL STEP:**

To add comments per individual line, click the **Line Comment** button next to the line item for which you wish to add the comment.

**Note:** Be sure to verify the line number so that the comment is associated with the correct line. The comment will print below the line item.

Select the **OK** button to return.
18. It is a requirement, per The Department of Purchasing, to add comments to the requisition. Click on the **Add Comments** link.

All Requisitions should contain the following information in the Comments area:
- Item Ordered For
- Delivery Location (Building AND Room)
- Zip +
- Contact Name for Questions (Name AND Extension)
19. You can use the **ReqDeli** Standard Comment to add the needed information. This is a predefined entry that will provide you with a template for delivery and contact information.

   a. Click on the **Use Standard Comments** link.

   ![Standard Comments](image)

   b. In the **Comment Type** field, enter Req.

   c. In the **Comment ID** field, enter Deli.

   d. Click on the **OK** button to return.
20. The Header Comments page returns with the Standard Comment.

![Header Comments page](image)

Read the template and fill in your information where applicable. **You will have to scroll down to complete all template fields.**

21. In order for the comment to print for the Supplier, on the receipt, and in order for Accounts Payable to view the comments, be sure to check the **Send to Supplier**, **Shown at Receipt** and **Shown at Voucher** checkbox(es).

22. There may be times, when you need to enter additional free-form comments. Some examples are:
   - What attachments are being sent to Purchasing.
   - Supplier information if not found in PeopleSoft.
   - Invoice number if entering an invoice.
23. **OPTIONAL STEP:**
   If you want to add additional comments in a new row, click on the **Add a new row** button.

   You would add new rows if you want comments to be directed to different people. For example, row one comment (delivery and contact information) is intended to print for the Supplier and on the Receipt (**Send to Supplier, Shown at Receipt** checkboxes active) and row two’s comment is intended only for the Supplier (only the **Send to Supplier** checkbox is marked).

24. **OPTIONAL (but encouraged) STEP:** Adding Justification for Order
   You can add a reason for placing the order. This would be added as an Approval Justification Comment.
   a. Add a new row for the comment by clicking on the **Add a new row** button.
   b. Mark the checkbox for **Approval Justification**.
   c. Enter the justification in the large edit box.
25. **OPTIONAL STEP**: Adding Attachments

If you have electronic documents that you want to submit with the requisition, you can attach them to the order.

Click on the **Attach** button.

Click on the **Browse** button and locate the file you want to attach. Click on the **Upload** button to add the file to the requisition.

26. After adding comments, approval justifications, and attachments click on the **OK** button to return to the Requisition page.

27. If the cost of the item is to be split between two or more SpeedCharts, see page 29.
28. The Requisition page displays again.

To save the requisition, click on the **Save** button.

The Requisition ID number will display in the top left corner of the Requisition.

**Note:** If you receive an error message, see Appendix B.
29. To print the requisition, click on the **View Printable Version** link above the Save button in the bottom left corner of the PeopleSoft window. A new window will open with the report.

**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.

**Note**: Think green and save money, consider saving the electronic PDF to your computer’s hard drive or a network drive rather than printing.

30. When the requisition is complete, you need to submit the requisition to your Approver (or to Budget Checking if you are a self-approver or a <$500 Requester).

In the top right quadrant of the page, click on the **Submit for Approval** button.

The **Status** will change to Pending. Your Approver will receive an e-mail notice that there is a requisition awaiting approval.
**Entering a Requisition with Multiple SpeedCharts per Line Item**

Use this process to enter a PeopleSoft requisition when you need to enter one PeopleSoft requisition and split the charges of one line to multiple SpeedCharts.

**Step by Step**

1. Follow the steps previously outlined for “Entering a Basic Requisition,” but stop before you save the requisition.

   Before you save the requisition, you will need to drill down on the line item that you need to make the adjustment to.

2. Click on the **Schedule** button for the line item that you need to split the charges for. This button is located on the far right, on the same line as the item you are adjusting.

3. The Schedule page displays.

   Click on the **Distribution** button.
4. The Distribution page displays.

Verify that the correct line item is displayed by reviewing the information on this page.

The default distribution method is by Quantity (Distribute By field). You can also change this value to Amount, if needed. This means you can divide the speedchart by Quantity or Dollar Amount.
5. Click on the **Multi-Speed Chart** link. The Multiple SpeedChart page displays.

![Multiple SpeedCharts](image)

In the **SpeedChart** field, reenter the default SpeedType that you previously entered on the Defaults page.

In the **Quantity (or Amount) to Distribute** field, enter either the Quantity or Amount for this SpeedChart. You can use decimals for Quantity, for example, 2.5.

Click on the **Add a New SpeedChart** button to add another row. Add the additional SpeedChart information.

![SpeedChart Selections](image)

You can continue to add rows and additional SpeedCharts, if necessary.

Click on the **OK** button.

**Note:** The totals must add up to 100% of the order (by quantity or amount) or you cannot leave this page.
6. The Distribution page displays again.

   ![Distribution page screenshot]

   Click on the OK button.

7. The Schedule page displays again.

   ![Schedule page screenshot]

   Click on the Return to Main Page link.

8. The Maintain Requisitions page displays again.

   ![Maintain Requisitions page screenshot]

9. To save the requisition, click on the Save button.

   The Requisition ID number will display in the top left corner of the Requisition.
10. When the requisition is complete, you need to submit the requisition to your Approver (or to Budget Checking if you are a self-approver or a <$500 Requester).

In the top right quadrant of the page, click on the **Submit for Approval** button.

The **Status** will change to Pending. Your Approver will receive an e-mail notice that there is a requisition waiting for approval.
Ending Notes for Adding Requisitions

After you save the requisition, an e-mail message will go to your Approver stating that there is a requisition awaiting their approval in PeopleSoft.

Also, after you save the requisition, one of the following will occur:

- If it is approved, you will receive an e-mail indicating that it was approved and forwarded to Purchasing for processing.
- If it was denied, you will receive an e-mail indicating that it was denied.
- If it was put on Hold for more information, you will receive an e-mail that additional information is needed.
- If no action was taken on the requisition in three business days, the Approver will receive an e-mail notification that states, “Reminder – Req ID # is awaiting approval”.

Note: If you are both the Requester and the Approver you will not need to follow the Approval Process Instructions. The requisition that you save will bypass the Approval Process and move on to Budget Checking (Commitment Control) per the Requisition Life Cycle.
Lesson 4: Printing a Requisition

Method 1: Printing a Requisition from the Maintain Requisitions Page

You can print a requisition right after you save it by using the **View Printable Version** link in the lower left corner of the Requisition page. You can print the requisition from this page anytime before the requisition has been approved. After a requisition has been approved, you will not be able to access this page and therefore you will need to follow Method 2 to print the requisition.

**Note:** Think green and save money, consider saving the electronic PDF to your computer’s hard drive or a network drive rather than printing.

**Step by Step**

1. Save the requisition that you are working on.

2. On the Maintain Requisitions page, click on the **View Printable Version** link.
3. 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.

   Once the process is complete, the requisition will automatically open in a new window.

   ![Departmental Purchase Requisition](image)

   **Note:** If the requisition **does not** open in a new window, you will have to follow the instructions for allowing pop-ups from The University of Akron. See Appendix A for additional information.

4. Select from the browser’s menu **File, Print.**

   **OR**

   Click on the **Printer** tool in the browser's toolbar or in Adobe Acrobat's toolbar.

5. You may opt to save the document (**File, Save As**) instead of printing if you wish to conserve paper or forward the requisition to someone else on campus electronically(**File, Send, Page by Email**).
Method 2: Printing a Requisition using the Requisition Print Page

Creating a Run Control

What is a Run Control ID?
A Run Control ID is an identification code that represents:
- your PeopleSoft ID
- the process you are running, such as printing a departmental budget report or printing a requisition

Each process that you run needs its own unique Run Control ID. If you print budget reports and print requisitions, you will create one Run Control ID for printing budget reports and one Run Control ID for printing requisitions.

When do you create a Run Control ID?
The first time that you run a process, you need to create a Run Control ID. Some examples of processes are gathering the data to print a Departmental Budget Report or gathering the data to print a requisition.

When you run the process in the future, you use the same Run Control ID as the first time that you ran the process.

What are the characteristics of a Run Control ID?
A Run Control ID can be up to 30 characters in length. It cannot contain spaces. Some examples of Run Control IDs are BudgetPrint or ReqPrint.
Step by Step: Printing a Requisition for the First Time

1. From the menu select: **Purchasing, Requisitions, Reports, Print Requisition.** OR **Process Financial Information, UA Department Inquiries, Report, Requisition Print**

   Click on the **Add a New Value** tab.

2. **Type** a RunControl ID with a maximum number of 16 characters and no spaces. For example, enter **ReqPrint**.

3. **Click on the Add button.**
4. The Print Requisition page displays. Enter or verify information as follows:
   - **Business Unit**: Akron
   - **Requisition ID**: Enter ID with lead zeros.
   - **Statuses to Include Frame**: Select All and select the option “On Hold AND Not On Hold” from the drop-down list.

   Click on the **Save** button.

5. Click on the **Run** button. The Process Schedule Request Page displays.

   ![Process Scheduler Request](image)

   Note/Select the following:
   - **Server Name**: PSNT or PSUNX
   - **Run Date**: (Do not change the system date that defaults.)
   - **Run Time**: (Do not change the system time that defaults.)
   - In the Process List grid at the bottom of the page, a checkmark needs to appear in the **Select** checkbox.
   - **Type**: Web
   - **Format**: PDF
6. Click on the **OK** button.

The Print Requisition page displays again:

Note the **Process Instance** number.

7. Click on the **Report Manager** link.
8. Click on the Administration folder tab.

In the Report List grid, look in the Prcs Instance field to locate the Process Instance number for your report.

You noted that number on the Requisition Print page.

Click on the Refresh button, periodically, until the Status is Posted. After the report is Posted, the Description will become a hyperlink.

**Note:** The Report Name will become a hyperlink once the status is Posted. Use this hyperlink to view the report.
9. Click on the **Description** hyperlink for the report. The report is opened in a new window.

![Departmental Purchase Requisition](image)

10. Select from the browser's menu **File, Print**.

OR

Click on the **Printer** tool in the browser's toolbar or in Adobe Acrobat's toolbar.

11. You may opt to save the document (**File, Save As**) instead of printing if you wish to conserve paper or forward the requisition to someone else on campus electronically(**File, Send, Page by Email**).
**Printing a Requisition (after the initial set-up)**

You should have already created a Run Control ID for printing a requisition. This would have been done the first time you printed a requisition using the report method. If you have not created a Run Control ID, please refer to the previous section in this chapter, *Printing a Requisition for the First Time*.

1. From the menu select: **Purchasing, Requisitions, Reports, Print Requisition**.

   Click on the **Find an Existing Value** tab.

   ![Requisition Print](image)

   In the **Run Control ID** field, enter the ID that you created, i.e., **ReqPrint**.

   **OR**

   Click on the **Search** button.

   If you did not enter the complete Run Control ID or if you clicked on the **Search** button, you will be returned Search Results at the bottom of the page. Click on the correct Run Control ID to advance to the next step.
2. The Print Requisition page displays.

3. Data from the last requisition print will display. Modify the data for the current request and continue with the process.

   Click on the Save button.

4. Click on the Run button. The Process Schedule Request Page displays.

   Note/Select the following:
   
   - **Server Name**: PSNT
   - **Run Date**: (Do not change the system date that defaults.)
   - **Run Time**: (Do not change the system time that defaults.)
   - In the Process List grid at the bottom of the page, a checkmark needs to appear in the Select checkbox.
   - **Type**: Web
   - **Format**: PDF
5. Click on the **OK** button.

The Print Requisition page displays again:

![Print Requisition Page](image)

Note the **Process Instance** number.

6. Click on the **Report Manager** link.

![Report Manager Page](image)
7. Click on the **Administration** folder tab.

In the Report List grid, look in the **Prcs Instance** field to locate the Process Instance number for your report.

You noted that number on the Requisition Print page.

Click on the **Refresh** button, periodically, until the **Status** is Posted. After the report is Posted, the **Description** will become a hyperlink.

**Note:** The Report Name will become a hyperlink once the status is Posted. Use this hyperlink to view the report.
8. Click on the **Description** hyperlink for the report. The report is opened in a new window.

![Departmental Purchase Requisition](image)

9. Select from the browser’s menu **File, Print**.

OR

Click on the **Printer** tool in the browser’s toolbar or in Adobe Acrobat’s toolbar.

10. You may opt to save the document (**File, Save As**) instead of printing if you wish to conserve paper or forward the requisition to someone else on campus electronically(**File, Send, Page by Email**).
Lesson 5: Recall a Requisition

This chapter will outline the process for opening the pages that you used to enter a requisition. You would use this process for the following reasons:

- To review or inquire on a previously saved requisition prior to Approval
- To return to a non-approved requisition to make changes

This chapter will also outline the steps for making changes to a requisition before and after approval, deleting or canceling a requisition, and working with a recycled requisition.

Part A: Opening a Requisition Prior to Approval

1. From the Main Menu, choose: Purchasing, Requisitions, Add/Update Requisitions

2. Click on the Find an Existing Value tab.
3. Search for the requisition using one or both of the search fields below:

**Requisition ID**: Use the operator of “=” or “begins with” if you are entering the full requisition ID. Use the operator of “contains” to enter just the last digits (minus the zeros).

**Requisition Name**: Enter the name you gave to the requisition when entering it into the system. You can use the operator of “contains” if you only remember part of the name.

**Requester**: The User ID of the requester must be used instead of the requester’s last name. This is the ID that you use to log into PeopleSoft. This is not case sensitive.

**Requester Name**: Search for the requester by entering their name, or use the operator of “contains” to enter a portion of the Requester’s name.

After you filled in the search criteria, click on the **Search** button.

**Note**: If you changed the Requester field when entering the requisition for the purpose of a different approver you will need to enter that Approver’s ID or name to recall that specific requisition.

4. Depending on the search criteria you entered, you may need to locate the requisition and click on any of the links for the requisition that you want to open.

![Maintain Requisitions Page]

5. Review or inquire by locating the desired data using the Maintain Requisitions page or by using the hyperlinks on the page.

**Note**: If you try to open a requisition after it has been approved using this instruction, you will be redirected to the Requisition Inquiry page. You cannot view a requisition via the Maintain Requisitions page after it has been approved.
# Part B: Modifying a Requisition Prior to Approval

If you are a Requester/Approver (dual role) you cannot change a requisition after you save and submit it. Please contact the Department of Purchasing if you need changes made to the requisition.

If you are a Requester with the Limited Authority Class (automatic approval on requisitions under $500) and you enter a requisition under $500, you cannot make changes to a requisition after you save and submit it. Please contact the Department of Purchasing if you need changes.

If you are only a PeopleSoft Requester (enter requisitions, but do not have Approval Authority), follow the steps outlined below.

1. From the Main Menu, choose: **Purchasing, Requisitions, Add/Update Requisitions**

2. Click on the **Find an Existing Value** tab.

3. Search for the requisition. Enter criteria and click on the **Search** button.

4. Depending on the search criteria you entered, you may need to locate the requisition and click on any of the links for the requisition that you want to open.

5. Make modifications to any field that you normally have access to, add new lines, or delete lines and then click on the **Save** button when you are done.

6. The requisition is ready for approval once again.
Part C: Modifying a Requisition after Approval

Requisitions may not be changed by the Requester after approval. Contact the Department of Purchasing (specifically the appropriate Buyer) if you need to make changes to the requisition.
Part D: Cancel a Requisition

Requisitions cannot be canceled by the Requester before or after approval. Contact the Department of Purchasing if you need to cancel the requisition.
Part E: Processing a Requisition put on Hold

Once you process and save a requisition it will go to your Approver to Approve, Deny or Hold. The status of Hold should be used if the Approver wants the Requester to make adjustments (of any kind) to the requisition prior to Approval, Budget Checking (Commitment Control) and then processing by the Department of Purchasing. If the requisition is on Hold, you will need to return to the requisition and make the necessary changes and save the updated requisition. Finally, it is recommended that you add a comment to the Requisition Review page so that the Approver receives notification that you took action and the requisition is again ready for their approval.

1. You will receive an e-mail message indicating that a requisition is awaiting action.

![E-mail Message](image)

Note: This link will not take you directly to the requisition that needs modifications. You will be directed to the Requisition Review page which will only allow you see the Approver’s comments and the requisition basics (you will not be able to make changes on this page, nor will there be a link to advance to the requisition). This page will also allow you to add comments that will be routed to the Approver so they are aware the requested changes have been made and the requisition is ready for approval again.
2. To go to the Requisition Review page to see the comments, click on the link at the bottom of the message.

The Requisition Review page displays:

3. Review the comments that the Approver added. You will have to navigate to the Requisitions pages to make the changes, but you are encouraged to return to the this page to add a comment once you have completed the changes so the Approver is notified that the requisition is ready for approval again.

4. From the Main Menu, choose: Purchasing, Requisitions, Add/Update Requisitions
5. Click on the **Find an Existing Value** tab.

   ![Find an Existing Value Tab](image)

6. Search for the requisition. Enter criteria and click on the **Search** button. Depending on the search criteria you entered, you may need to locate the requisition and click on any of the links for the requisition that you want to open.

7. Make modifications and then click on the **Save** button when you are done.

8. The requisition is now ready for approval once again.

9. Click on the **Worklist** link in the Navigation Header.

   ![Worklist Link](image)

10. The Worklist displays:

    ![Worklist Display](image)

    Click on the link for the Requisition in the Link column to reopen the Requisition Review page.
11. The Requisition Review page displays:

12. In the **Enter Comments** edit box, add a comment that will go back to the Approver.

Click on the **Save Comments** button. The Approver will now receive an e-mail notification, “Requested Action Taken” and will provide a link for them to navigate back to the Approval pages once again for approval.
13. The **Review/Edit** frame will also update to show your comment:

```
SARA TEST 1: Awaiting Further Approvals

On Hold
  No Self-Approval under $500
  952/9/12 - 3:01 PM

Information Request
  Training ID
  Information Request

Comments
  Training ID at 05/29/12 - 3:53 PM
  I made the changes you requested.

  Training ID at 05/29/12 - 3:01 PM
  Please change quantity to 5.
```
Lesson 6: Requisition Inquiry

Requisition Inquiry Page

Use this page to locate the following information:

- Status of the requisition
- The Date the requisition was created
- Total Amount of requisition
- Items on a requisition
- Approval History
- If a Purchase Order has been created
- If the items from the requisition have been received
- If a Voucher has been created
- If payment has been made and the check number

Step by Step

1. From the Main Menu, choose:
   Purchasing, Requisitions, Review Requisition Information, Requisitions

   The Requisition Inquiry search page is displayed.

   Use this page to enter the criteria for the requisitions on which to check the status.
2. Fill in search criteria. The use of more criteria will return a smaller group of requisitions.

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>AKRON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition ID</td>
<td>Enter Requisition ID, including any leading zeros. Example: 0000068609 To select a range of Requisition IDs, enter the beginning Req ID here and the ending Req ID in the To Req field. (Remember that search results are limited to 20 rows.)</td>
</tr>
<tr>
<td>Requisition Name</td>
<td>Enter the name you gave the requisition during the requisition entry process. This is a field that is entered by the Requester and should relate to the requisition.</td>
</tr>
<tr>
<td>Requester</td>
<td>This is the PeopleSoft ID for the person who entered the Requisition. This is a case sensitive field. Enter the ID in all capital letters. You can use the Look Up button to locate IDs. For example:</td>
</tr>
<tr>
<td>Requester Name</td>
<td>Search for the Requester by entering his/her name. The format for name is FirstName LastName. There is a space between the first name and last name. This is a case sensitive field. Use an initial capital letter for the first name and for the last name. Examples: Susan Instructor or Joseph Professor</td>
</tr>
<tr>
<td>Requisition Date</td>
<td>Enter the date on which the Requisition was entered. You can use the Choose a Date tool to display a calendar to select a date. To select a range of dates, enter the beginning date here and the ending date in the To field. (Remember that search results are limited to 20 rows.)</td>
</tr>
<tr>
<td>Supplier ID</td>
<td>Enter the Supplier ID. To lookup the Supplier ID, click on the Supplier Lookup link.</td>
</tr>
</tbody>
</table>
3. Locate the requisition you want to review. The Requisitions Inquiry Details page is displayed.

- The Show All Columns tool
- Use this tool to download the data in the grid to Excel.
- Click on the link for the Requisition ID to display the Line Details page. Use the Return button to return to the Requisition Inquiry pages.

4. You can find the following information on the Requisitions Inquiry - Details page.
   - Requisition number
   - Status (Approved, Denied, Hold, Pending Approval, Canceled, or Complete)
   - Requester
   - Requisition Date
   - Total Amount

5. Click on the Show All Columns tool.

   All the columns from the two tabs, Details and Status, are displayed on the page. There are no tabs. Scroll to see all the data.
PeopleSoft Version 9.2: Requisitions

6. Click on the **Show tabs** tool.
   The two tabs, Details and Status, are displayed, again

7. Click on the **Status** tab to review additional information.

8. On the Status page, you can find the following information.
   Use the **Return** button to go back to the Requisitions Inquiry page.

   - **If a PO has been created:**
     Click on the Y link in the **On PO** column to obtain the PO ID number.

   - **If a Receipt has been created:**
     Click on the Y link in the **Received** column to obtain the Receiver ID number.
     This requisition does not have a receipt.

   - **If a Voucher has been created:**
     Click on the Y link in the **On Voucher** column to obtain the Voucher ID number.
     The Voucher ID link includes additional details including the Accounting (General Ledger) entries.

     The **Payment Information** link opens a second PeopleSoft window to display the payment data such as check number (Payment Reference ID), date, total check amount and amount paid for this voucher. Close the window after your review.
9. Return to the Requisition Inquiry page. Use OK, Return, or Cancel to move back a step.

10. Click on the **Search** link to return to the Requisition Inquiry Search page.

11. If the Requisition ID number is not known or you need to search for a group of requisitions, enter the appropriate criteria.

   In this example, criteria was entered to search for the requisitions created **between 05/01/2014 and 05/31/2014** for a particular Requester.

   The Requester field is case sensitive. Type the Requester ID in all capital letters.

   ![Requisition Inquiry](image)

   *Figure 1: Requisition Inquiry page*

12. Click on **OK** to begin the search.

   The Requisitions Inquiry Details page is displayed with the search results.

   **Be sure to check the View Tools are in the grid’s header. Click on **View All** to display all the results if more than one requisition was returned.**

   ![View Tools](image)

   *Figure 2: View Tools in the grid’s header*

   In this example, after clicking on View All, all the requisitions display.
Note: If the search criteria entered returns more than 20 requisitions in the search results, this message displays.

Click on OK to proceed to the Requisitions Inquiry Details page. If you do not see the requisition(s) that you need in the search results, modify your search.
Document Status Inquiry Page

Use this page to locate the following information:

- Requisition Status
- Budget Status
- Requester Name
- Document ID’s for Purchase Order, Voucher and Payments

Step by Step

1. From the Main Menu, choose:

   **Purchasing, Requisitions, Review Requisition Information, Document Status**

   The Requisition Document Status search page is displayed.

   Use this page to enter the criteria for the requisitions on which to check the status.

2. Fill in search criteria:

   **Requisition ID:** Enter Requisition ID, including any leading zeros.
   Example: 0000068609
   **Requisition Date:** Date the requisition was entered. You can use the choose a date button.
   **Requester:** This is the PeopleSoft ID for the person who entered the Requisition
   This is a case sensitive field. Enter the ID in all capital letters. You can use the
   Look Up button to locate IDs.
   For example: [Input]

   Click on the **Search** button.
3. Locate the requisition and click on any of the links for the requisition that you want to inquire about.

The Requisition Document Status page display:

On this page you can find the following information:

- Requisition Status (Approved, Denied, Recycled, Pending Approval, Canceled, Complete)
- Budget Status (Valid, Not Chk’d, Error)
- Requester
- Document ID’s for Purchase Order, Receipt, Voucher, and Payment

Click on the DOC ID link to view the Purchase Order, Receipt, Voucher or Payment. A new page will display with the requested document’s information.

**Remember:** The Purchase Order must have a status of Dispatched to be considered a legal commitment by the University to purchase the requested goods or services.
Appendix A: Allowing Pop-Ups

Configure Pop-up Blocker

The following instructions are provided to enable pop-ups from The University of Akron web sites. This is necessary so that PeopleSoft can open new windows to display reports or to open Excel.

1. From within Internet Explorer, select the arrow to the right of the icon and select Pop-up Blocker > Pop-up Blocker Settings.

   The Pop-up Blocker Settings dialog box displays.

2. In the box for Address of Web site to allow, enter uakron.edu.

   ![Pop-up Blocker Settings dialog box]

   **Address of website to allow**: uakron.edu
   **Exceptions**: Pop-ups are currently blocked. You can allow pop-ups from specific websites by adding the site to the list below.

   ![Add button]
   **Add**

   ![Allowed sites]
   **Allowed sites**:

   ![Notifications and filter level]
   **Notifications and filter level**:
   - Play a sound when a pop-up is blocked.
   - Show Information Bar when a pop-up is blocked.
   - Filter level:
     - Medium: Block most automatic pop-ups

   ![Pop-up Blocker FAQ]
   **Pop-up Blocker FAQ**
3. Click the Add button.

*.uakron.edu displays in the Allowed sites box,

![Pop-up Blocker Settings](image)

Verify there is a check in this box.

4. Repeat steps 2 and 3 for uanet.edu.

5. Make sure there is a check in the box for Show Information Bar when a pop-up is blocked.

6. Click the Close button.

**Note:** Some browser plug-ins, such as the Yahoo search bar, Google search bar, and MSN search bar may have built-in popup blockers. While in PeopleSoft, remove these toolbars from the display at View > Toolbars.
Configure Pop-up Blocker: Windows 7 Settings

The following instructions are provided to enable pop-ups from The University of Akron web sites. This is necessary so that PeopleSoft can open new windows to display reports or to open Excel.

1. From within Internet Explorer, select the arrow to the right of the icon and select Pop-up Blocker > Pop-up Blocker Settings.

   The Pop-up Blocker Settings dialog box displays.

2. In the box for Address of Web site to allow, enter uakron.edu.

   ![Pop-up Blocker Settings dialog box](image)
3. Click the Add button.

*.uakron.edu displays in the Allowed sites box,

![Pop-up Blocker Settings](image)

Verify there is a check in this box.

4. Repeat steps 2 and 3 for uanet.edu.

5. Make sure there is a check in the box for Show Information Bar when a pop-up is blocked.

6. Click the Close button.

**Note:** Some browser plug-ins, such as the Yahoo search bar, Google search bar, and MSN search bar may have built-in popup blockers. While in PeopleSoft, remove these toolbars from the display at View > Toolbars.
Appendix B: Error Message When Saving a Requisition

If you did not follow the steps outlined, specifically step X on page X, you will get an error message that will prevent you from saving the requisition.

The error message is as follows:

UA MSG: Need fund, dept, program, class & account to add Req. Check distribution lines. Be sure to enter the Defaults/Details panel tab first, then the Requisition Form tab.

The PeopleCode program executed an Error statement, which has produced this message.

To correct the requisition do the following:

1. Click on the **OK** button.

2. Click on the **Requisition Defaults** link.

3. Re-enter the SpeedChart in the **SpeedChart** field.

4. Click on the **OK** button

5. Click on the **Mark All** link.
   **Note:** The result of clicking on the **Mark All** link will be a checkmark in all checkboxes in the **Apply** column.

6. Click on the **OK** button.

7. Click on the **Save** button again
Appendix C: Workflow Messages

Requisition in Worklist waiting to be approved- goes to Approver

Subject: Approval Requested for Req ID 0000069168

Requisition ID 0000069168 is in your worklist awaiting approval.

Requestor ID: PEGGYD
Requester Name: Peggy Drennen, IS Test ID
Requisition Name: test for sara
Date: 2012-06-05

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

https://uadevi-fs2.uakron.edu/psp/akrfmbps/EMPLOYEE/ERP_FBP5/v/VIEW/Main Menu.PV_REQ_APPROVAL.GBL?
Action=U&Business_UNIT=AKRON&Req_ID=0000069168

Requisition has been approved- goes to Requester

Subject: Req ID 0000069168 Has Been Approved

Requisition ID 0000069168 has been approved.

Requestor ID: PEGGYD
Requester Name: Peggy Drennen, IS Test ID
Requisition Name: test for sara
Date: 2012-06-05

You will receive an email from the Department of Purchasing when this requisition has been successfully sourced to a purchase order.

Requisition has been denied- goes to Requester

Subject: Req ID 0000069053 Has Been Denied

Requisition ID 0000069053 has been denied.

Requestor ID: PEGGYD
Requester Name: Peggy Drennen, IS Test ID
Requisition Name: Test
Date: 2012-04-10

Please review the approver’s comments on the approval page. You can navigate directly to the approval page for more information by clicking the link below.

https://uadevi-fs2.uakron.edu/psp/akrfmbps/EMPLOYEE/ERP_FBP5/v/VIEW/Main Menu.PV_REQ_APPROVAL.GBL?
Action=U&Business_UNIT=AKRON&Req_ID=0000069053

Requisition was put on Hold (requisition needs changes)- goes to Requester

Subject: Action is Requested on Req ID 0000069053

Action has been requested on requisition ID 0000069053.

Requestor ID: PEGGYD
Requester Name: Peggy Drennen, IS Test ID
Requisition Name: Test
Date: 2012-04-10

Please review the approver’s comments on the approval page. You can navigate directly to the approval page by clicking the link below.

https://uadevi-fs2.uakron.edu/psp/akrfmbps/EMPLOYEE/ERP_FBP5/v/VIEW/Main Menu.PV_REQ_APPROVAL.GBL?
Action=U&Business_UNIT=AKRON&Req_ID=0000069053
**Requested action taken- goes to Approver**

Subject: Requested Action Taken on Req ID 0000069053

Requested action has been taken on requisition ID 0000069053.

Requester ID: PEGGYD
Requester Name: Peggy Drennen, IS Test ID
Requisition Name: Test
Date: 2012-04-18

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://uakronfs2.uakron.edu/psp/akriskbpx/EMLOYEE/EBP_FBP5/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?
Action=U&BUSINESSUNIT=AKRON&REQ_ID=0000069053

**Adding an additional Approver- goes to added (new) Approver**

Subject: Approval Requested for Req ID 0000069169

Requisition ID 0000069169 is in your worklist awaiting approval.

Requester ID: PEGGYD
Requester Name: Peggy Drennen, IS Test ID
Requisition Name: Testing
Date: 2012-06-05

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

https://uakronfs2.uakron.edu/psp/akriskbpx/EMLOYEE/EBP_FBP5/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?
Action=U&BUSINESSUNIT=AKRON&REQ_ID=0000069169

**Additional Reviewer added - no approval required, FYI- goes to added Reviewer**

Subject: Add'l Review Requested on Req ID 0000069170

Additional review was requested for Requisition ID 0000069170 by the original approver. It is in your worklist awaiting review.

Requester ID: PEGGYD
Requester Name: Peggy Drennen, IS Test ID
Requisition Name: Test
Date: 2012-06-05

You can navigate directly to the requisition review page by clicking the link below.

https://uakronfs2.uakron.edu/psp/akriskbpx/EMLOYEE/EBP_FBP5/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?
Action=U&BUSINESSUNIT=AKRON&REQ_ID=0000069170

**Timeout /Escalation notice- goes to Approver**

Subject: Reminder - Req ID 0000071118 is awaiting approval

Reminder Notice:

Requisition ID 0000071118 is in your worklist awaiting approval.

Requester ID: PEGGYD
Requester Name: Peggy Drennen, IS Test ID
Requisition Name: Test
Date: 2012-06-05

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

https://uakronfs2.uakron.edu/psp/akriskbpx/EMLOYEE/EBP_FBP5/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?
Action=U&BUSINESSUNIT=AKRON&REQ_TD=0000071118
There are three ways to initiate approving a requisition in PeopleSoft.

1. From the e-mail notification you receive.
2. From the new Manage Requisition Approvals page.
3. From the PeopleSoft Worklist.

**Note:** Smartphones are NOT supported devices for approving PeopleSoft requisitions.

**Method 1: E-mail Notification**

1. As the Approver, you will receive an e-mail message indicating that you have a requisition waiting approval in your PeopleSoft Worklist.
2. Click on the link at the bottom of the message.
3. You will be prompted to log into PeopleSoft, if you are not already logged in. Enter your User ID and Password.
4. The Requisition Approval page displays.
5. Once on the Requisition Approval page, see reverse side for step by step instructions.

**Method 2: Manage Requisitions Approvals Page**

1. In PeopleSoft, navigate using the menu to: **Purchasing, Requisitions, Manage Requisition Approvals.**
2. Click on the **Search** button to retrieve requisitions awaiting your review. You may have to adjust the search criteria at the top of the page prior to clicking on the Search button.
3. To approve a requisition, click on the link for the requisition in the **Req ID** column.
4. The Requisition Approval page displays.
5. Once on the Requisition Approval page, see reverse side for step by step instructions.

**Method 3: PeopleSoft Worklist**

(This was the method used in the prior version of PeopleSoft Financials)

1. To open the Worklist, click on the **Worklist** link in the Navigation Header in the top right of the PeopleSoft window.
2. Your Worklist will open and will display requisitions awaiting your approval.
3. To review a requisition, click on the link for the requisition in the **Link** column.
4. The Requisition Approval page displays.
5. Once on the Requisition Approval page, see reverse side for step by step instructions.

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.
Regardless of the method you choose to initiate the Approval Process, you will end up at the Requisition Approval page.

Requisition Approval Page:

1. 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. 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.

2. Add comments in the large edit box prior to selecting an action.

   ![Comment Box]

   **Note:** Comments are required for Deny and Hold.

3. Click on the Approve, Deny or Hold button.

   The page will update and reflect the action just taken. For example, if the requisition was approved:

   ![Requisition Approved]

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