



Requisition Approval REQ02

PeopleSoft Financials 8.4



Requisition Approval

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Overview

In PeopleSoft Purchasing, a requisition is identified by a requisition ID unique within a business unit, allowing for a consistent means of tracking all requests through the system. This manual is meant help you understand the requisition approval process.

Objectives

By the end of this Course, you will know:

- What the Pending Approval Requisition e-mail looks like
- How to check your Worklist for Requisitions Pending Approval
- How to approve/deny a Requisition
- Once approved, how to remove a requisition from your Worklist
- How to use the Requisition Inquiry tool

Requisition Process

Once a Requisition has been...

- **Saved**, set to **Pending Approval**, and passed a "**Valid**" **Budget Check**, a process will automatically assign a requisition ID # and notify you (the requester) that the requisition is waiting to be approved by an e-mail as well as a **Worklist** item.
- As the **Requester**, you will go to the **Approve Amounts** component or your Worklist to approve/deny the requisition.
- Once the Requisition is approved, it will automatically be routed to a Buyer in the Purchasing Department for processing.
- If the Requisition is Denied, a notification will be sent to the **Initiator** to make the proper changes.


Chapter 1 - Pending Approval Requisition Notice

E-mail Notice of Requisition

As Requesters, you will receive an e-mail notification when there is a requisition that requires your approval. This e-mail will appear in your lotus notes screen as follows:


	Who	Date	Size	Subject
★	mortonk	01/21/2004	2,155	Requisition 0000000229 requires your approval.

When you open up this e-mail it will look as follows:

	mortonk@fiu.edu 01/21/2004 04:34 PM	To: <input type="text" value="lia.duran@fiu.edu"/> cc: <input type="text"/> Subject: Requisition 0000000229 requires your approval.
<p>Select the following link to access the requisition approval page: http://psdevweb.fiu.edu:8300/psp/psfstrn/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQ_APPROVAL_AMT.GBL?Page=REQ_APPROVAL_AMT&BUSINESS_UNIT=FIU01&ORIGIN=PO&REQ_ID=0000000229</p>		

From this page you would click on the [link](#).

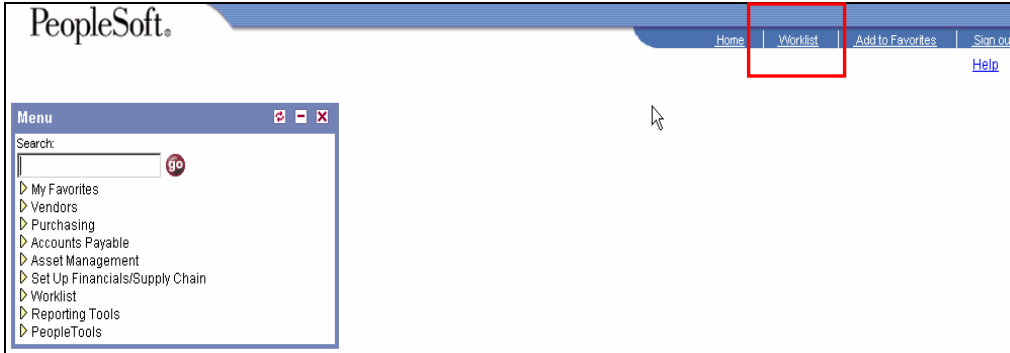
This [link](#) will take you to the Panthersoft sign on screen if you are not logged on.

	FLORIDA INTERNATIONAL UNIVERSITY STUDENT ADMINISTRATION SYSTEM
<p>Panther ID: <input type="text"/></p> <p>Password: <input type="password"/></p> <p>Look up your Panther ID by clicking here. Forgot your Password? Click Here!</p> <p><input type="button" value="Sign In"/></p>	

Once you sign on it will take you directly to the **Approve Amounts** Component for you to **Approve** or **Deny** Requisition.

Workflow Notice of Requisition

As **Requesters**, you will have access to a **Worklist**. To get to your **Worklist** you would click on the **Worklist** link on the top right corner of your screen.



Your **Worklist** will have a list of all the requisitions waiting for your approval as **Worklist** items. **Worklist** Items will have a title of “**Requisition Amount Approval**” if you have any requisitions that require your approval.

Worklist for REQAPPR1: Requester - Req Approver 1

[Detail View](#) Work List: Filters:

Customize | Find | View 100 | First 1-25 of 133 Last

From	Date From	Work Item	Worked By Activity	Priority	Link		
Lia Duran	06/16/2004	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	237.FIU01.0000000288	Mark Worked	Reassign
Lia Duran	06/16/2004	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	239.FIU01.0000000290	Mark Worked	Reassign

You may do 1 of 2 things:

Click on the [link](#) with the Requisition # on it.

Click on the button to reassign the requisition to the person who has authority to approve this requisition.

When you click the [239.FIU01.0000000290](#) link, it will take you directly to the Requisitions approval pages for you to **Approve or Deny** the Requisition.

NOTE: The last 10 numbers on the link represent the Requisition ID number.

Chartfields Page

Requester & Initiator

Approval | Details | **Chartfields**

Unit: FIU01 Req: 0000000290 Requester: REQAPPR1
Entered By: Requisition Trainer 1

Distributions/Chartfields															
Line	Sched	Distrib	Status	Amount	GL Unit	Account	Description	Alt Acct	Fund	DeptID	Description	Program Class	Bud Ref	Project	Description
1	1	1	Open	450.00	FIU01	711903	F&E Less than \$1,000	71100	857	110100001	ATHLETICS	51	1		

Customize | Find | View All | First 1 of 1 Last

Save View Worklist Next in Worklist Previous in Worklist Notify

Approval | Details | Chartfields

- **Amount** – Total Amount of the Requisition Line Item.
- **GL Unit** – (Business Unit) FIU01.
- **Account** – Account funding the Purchase (Old Object Code).
- **Description** – Account Description
- **Alt Acct** – The roll up Account for the Account chosen.
- **DeptID** – Department funding the Purchase
- **Description** - Department description

You can now click on the **Details Page** to verify the items that are being ordered.

Details Page

[Approval](#)
Details
[Chartfields](#)

Unit: FIU01 Req: 0000000290 Requester: REQAPPR1
 Entered By: Requisition Trainer 1

Line Details
Customize | Find | First 1 of 1 Last

[Amounts/Qty](#)
[Details](#)

Line	Sched	Description	Req Qty	UOM	Price	Base Amt	Currency	Base Currency	Vendor ID	Name 1
1	1	Cabinets	3.0000	EA	150.00000	450.00	USD	USD	0000000001	1 800 PATCHES

Save
 View Worklist
 Next in Worklist
 Previous in Worklist
 Notify

[Approval](#) | [Details](#) | [Chartfields](#)

- **Description** – The Item description entered by the Initiator.
- **Req Qty** – The quantity of each Item that you are requesting.
- **Unit of Measure (UOM)** - The selected UOM for the item.
- **Price** – The per-unit cost for the items.
- **Vendor ID** – This is the vendor selected by the Initiator
- **Name 1** – The name of the Vendor.

You can now click on the **Approval Page** to approve/deny the requisition.

Approval Page

Once you have verified the Dept/Project ID that is funding the requisition and what items are being ordered, you may approve/deny the requisition.

Approval | [Details](#) | [Chartfields](#)

Unit: FIU01 Req: 0000000290 Requester: REQAPPR1

Entered By: Requisition Trainer 1

*Approval Action: Approval Status: In Process

Comment

Amount Details

Requisition Date:	04/21/2004
Total Amount:	450.000 Dollar
Total Base Amount:	450.000 Dollar

[Approval](#) | [Details](#) | [Chartfields](#)

On the requisition **Approval Page** the approver has 2 options:

- **Approve** – Choose an **Approval Action** of '**Approve**' and save the page. The **Approval Status** will be changed to '**Complete**'. The requisition will be set to '**Approved**' and sourced to a Purchase Order.
- **Deny** – Deny the requisition by choosing an **Approval Action** of '**Deny**' and save the page. A comment should be entered in the **Comment Section** explaining the reason for the denial. A workflow notification along with the comment entered will be sent to the Initiator that entered the requisition. The Initiator should then modify or cancel the requisition; whichever is appropriate.
- **Recycle** – FIU has chosen not to use this option.
- **Comments** – You may enter comments or explanations in the Comments section.

NOTE: If more detailed information is needed before approving the requisition, Review Requisition Information (Chapter 3) will provide that information.

Do not forget to click on the  **Save** button before navigating away from this page.

Removing Items from your Worklist

Once you have approved or denied the requisition, go back to your **Worklist** and click the




button. This will remove this requisition from your **Worklist**.

Worklist for REQAPPR1: Requester - Req Approver 1

[Detail View](#) Work List

Filters:

Worklist Customize | Find | View 100 |  First 1-25 of 133 Last

From	Date From	Work Item	Worked By Activity	Priority	Link		
Lia Duran	06/16/2004	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	237_FIU01_0000000288	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>
Lia Duran	06/16/2004	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	239_FIU01_0000000290	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>

Chapter 2 - Requisition Approve Amounts

You may also use the **Approve Amounts** page to search for the Requisition that needs your approval. You will need the Requisition ID #, or the Requesters Panthersoft ID # to use this component.

Navigation

- Purchasing
- Requisitions
- Approve Amounts

Amount Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Business Unit: [=]

Requisition ID: [begins with]

Requester: [begins with]

Case Sensitive

[Basic Search](#)

Search Results

[View All](#)
First
◀
1-100 of 163
▶
[Last](#)

Business Unit	Requisition ID	Requester
FIU01	0000000456	REQAPPR1
FIU01	0000000455	REQAPPR1

Once you find the Requisition you would like to approve just click on the link, and it will take you to the **Charfields Page** as shown in Chapter 1.

To approve/deny the requisition simply follow the same steps illustrated in the previous chapter.



Activity

1. You have just received an e-mail notification that says:

“Requisition 0000000### requires your approval”.

Research before Approving the Requisition by using the “Review Requisition Information” Component.

(You may use “New Window” to open up another window to work with).

Approve the Requisition.

2. You have just received an e-mail notification that says:

“Requisition 0000000### requires your approval”.

Research before Approving the Requisition by using the “Review Requisition Information” Component.

(You may use “New Window” to open up another window to work with).

Deny the Requisition.

Chapter 3 – Using the Requisition Inquiry Tool

Navigation

- Purchasing
- Requisitions
- Review Requisition Information
- Requisitions
 - Accounting Entries
 - Workbench
 - Change History
- Enter the Requisition ID

Click "OK"

Enter your Requisition ID number in the field and click on **OK**.
(Example Req. ID # 000000327)

The following page will appear.

Requisitions					
Req Inquiry					
Details		Status			
Unit	Requisition	Status	Requester	Req Date	Total Amt Currency
<input checked="" type="checkbox"/>	FIU01	000000327	Approved	Requester - Req Approver 1	05/18/2004 4800.000 Dollar

[Search](#) [Approval History](#) Header Comments [Document Status](#)
 Show RFQ [Show PO](#) Show Receipts Show MSR Show Voucher / Payment

If the Requisition has been assigned to a **Purchase Order** the Show PO link would be active as shown above.

Click on [Show PO](#) to view the **Purchase Order** information.

Requisition to Purchase Order List

Unit: FIU01 Req ID: 0000000327

Purchase Order Details Customize | Find | View All | First 1 of 1 Last

Details More

Sel	Line	Sched	Dist	Status	Drop Ship	PO ID	Line	Sched	Dist	Status	Due Date	Item ID	Description
<input checked="" type="checkbox"/>	1	1	1	Processed		0000000321	1	1	1	Pend Appr	05/18/2004		Desktop - Model # 140z

[PO Inquiry](#)

[Return](#)

To view more PO details click on **[PO Inquiry](#)**. The following page will show you all the information pertaining to the Purchase Order.

Form [Schedule](#)

Unit: FIU01 PO: 0000000321

Vendor: 2RPRODUCTI-001 ID: 0000000005 [Vendor Details](#) Buyer: Andrew Gordon

PO Date: 05/18/2004 PO Status: Pend Appr Receipt: Not Recvd Backorder Status: None

Budget: Not Chk'd 1 to 1 of 1

Lines Customize | Find | View All | First 1 of 1 Last

Sel	Line	Item	Item Description	Category	PO Qty	UOM	Amount	Status
<input checked="" type="checkbox"/>	1		Desktop - Model # 140z	COMPUTER_OCO	4.0000	EA	4800.00 USD	Active

Merch.: 4800.00 Adj Amt: Total: 4800.00 USD 1 to 1 of 1

[Header Details](#) [Matching](#) Header VAT [All RTV](#) Header Comments [Line Details](#) Line Comments [Document Status](#)

[Return to Search](#) [Notify](#) [RelatedLinks](#)

[Form](#) | [Schedule](#)

From the **Requisition Inquiry Page** you can also click on the Requisition link to view more information.

Requisitions

Req Inquiry Customize | Find | View All | First 1 of 1 Last

Details Status

Unit	Requisition	Status	Requester	Req Date	Total Amt	Currency
<input checked="" type="checkbox"/> FIU01	0000000327	Approved	Requester - Req Approver 1	05/18/2004	4800.000	Dollar

[Search](#) [Approval History](#) Header Comments [Document Status](#)
 Show RFQ [Show PO](#) Show Receipts Show MSR Show Voucher / Payment

The system will take you to the **Line Details Page** where you can view each Item being ordered along with the Vendor, Quantity, and Amount.

Line Details

Unit: FIU01 Req ID: 0000000327

Requisition Details Customize | Find | View All | First 1 of 1 Last

Details More

Sel	Line	Item ID	Description	Vendor ID	Name	Req Qty	UOM	Amount	Currency
<input checked="" type="checkbox"/>	1		Desktop - Model # 140z	0000000005	2 R PRODUCTIONS	4.0000	Each	4800.00	Dollar

[Schedule Details](#) Line Comments [View Hierarchy](#)

From this page you can click on the **Schedule Details** link.

The system will take you to the **Shipment Details Page** where you can view each schedule.

Shipment Details

Unit: FIU01 Req ID: 0000000327 Line: 1

Customize | Find | View All | First 1 of 1 Last

Sel	Sched	Due Date	Ship To	Price	Req Qty	Amount	Currency	Revision
<input checked="" type="checkbox"/>	1		CENTRL REC	1200.00000	4.0000	4800.00	Dollar	

[Distribution Details](#) Drop Shipment

From this page you can click on the **Distribution Details** link, the system will take you to the **Distribution Information Page** where you can view all of the above in addition to the Chartfields the charges are being made to.

Distribution Information

Unit: FIU01 Req ID: 0000000327 Line: 1 Sched Num: 1

Customize | Find | View All | First 1 of 1 Last

Details More EST

Sel	Line	Status	Location	Req Qty	Amount	Currency	GL Unit	Account	DeptID	Class	Fund	Program	Bud Ref	Project	Alt Acct	Oper Unit
<input type="checkbox"/>	1	Processed	SEE BELOW	4.0000	4800.00	Dollar	FIU01	721404	110100001	1	657	51			72100	

Account

Department

Projects Asset Information

