How to Manage eProcurement Requisitions

This job aid shows site managers how to view, approve, and/or deny orders for goods and services placed by site staff using eProcurement Requisitions. Mar 2024

To View Requisitions

- 1. Log into PeopleSoft FIN
- 2. Click the NavBar, select Worklist .



3. Click on the Req ID link .



 General order information will display in the top section, including the person who submitted the requisition, the date, status, and budget status. In Line Information section, click View Line Details.

Note: Details will open up in a separate tab in your browser.

Business Unit SDUSD Requisition ID REQ532801 Requisition Name Staples Dry Erase markers Rm1 Kins Doe Priority Entered on 02/14/2024 Status Pending Priority Medium Budget Status Valid Requester's Justification Requester's Justification Requester's Justification Total Amount 84.36 USD Valid Image: Priority Medium Budget Status Valid Requester's Justification Requester's Justification Requester's Justification Requester's Justification Retrievestor Time Information (*) Image: Priority Image: Priority Retrievestor
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Pending
Alex Doe Single Approver for Dept
▼ Line 2:Pending
ABSENCE REPORT CANCELLATION 3-3/4 X 2-1/2 IN 20 LB. #4 BOND PINK, PRINT 1 SIDE ONLY , BLACK INK, PADDED 50 PER PAD STK # 22A0690 Department Approval - Single
Pending
Alex Doe Single Approver for Dept
Enter Approver Comments
Return to Worklist



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 Review requisition details including the budget string. When finished, click the (X) in the upper right corner of browser tab to close and return to requisition.

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dwatraining.sandi.net/	psc/fin92tm/view/%7b/	2%76/CAS#974	p92kMEQ1UWMV7dhasf0T 🛧
	Requester: 180302		Status: Pending Approval
	Requested By: Kris Doe	//	Currency: USD
Erase markers Rm1	Entered Date: 2/14/24		Requisition Total: 84.36
-622-5505, cdoe@sandi.net	t	5\	
Expo Dry Erase Markers,	Quantity: 6.0000	Important! R accuracy. Cli details tab w	leview requisition details for ck (x) to close Requisition hen done.
Ship To: 5983A Due Date: Freight Terms:DESTIN	Address: Supply Center 2351 Cardinal L	Ln BLDG K	Shipping Quantity: 6.0000 Shipping Total: 51.96
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- To approve items , continue to *next step*.
- To deny items, go to Step 8.

To Approve All Items

- 6. Make sure items to approve are checked. Click **Approve**.
- Line Information ⑦ Line Information 1-2 of 2 🗸 Ъ **耳** Q Line Item Description Supplier Name Quantity UOM Price 1 🛞 Expo Dry Erase Markers, Fine.. STAPLES DC-001 6.0000 DZ 8.66 USD USD 2 🛞 Expo Dry Erase Markers, Chis.. STAPLES DC-001 5.0000 DZ 6.48 USD USD 6 Select All / Deselect All 0 Approve Denv View Line Details
- Review confirmation. Click Return to Worklist link to manage other requisitions.

Requisition Approval

Confirmation

Staples Dry Erase markers Rm1 has been approved.

Review/Edit Approvers

Requisition Approval

Line 1:Approved Expo Dry Erase Markers, Fine Ti	o, Black, 12/Pa	ack (86001)	
ment Approval - Single			
roved			
Kris Doe			
Single Approver for Dept 03/07/24 - 10:43 AM			
Line 2:Approved			
Expo Dry Erase Markers, Chisel	lip, Black, 12/	Pack (80001)	
ment Approval - Single			
roved			
Kris Doe			
Single Approver for Dept			
	Line 1:Approved Expo Dry Erase Markers, Fine Tip ment Approval - Single roved Kris Doe Single Approver for Dept 03/07/24 - 10:43 AM Line 2:Approved Expo Dry Erase Markers, Chisel T ment Approval - Single roved Kris Doe	Line 1:Approved Expo Dry Erase Markers, Fine Tip, Black, 12/Pa ment Approval - Single roved Kris Doe Single Approver for Dept 03/07/24 - 10:43 AM Line 2:Approved Expo Dry Erase Markers, Chisel Tip, Black, 12/ ment Approval - Single roved Kris Doe	Line 1:Approved Expo Dry Erase Markers, Fine Tip, Black, 12/Pack (86001) ment Approval - Single roved Kris Doe Single Approver for Dept 03/07/24 - 10:43 AM Line 2:Approved Expo Dry Erase Markers, Chisel Tip, Black, 12/Pack (80001) ment Approval - Single roved Kris Doe Kris Doe

Additional resources and training opportunities can be found on the **PeopleSoft site**, <u>found here</u>. Or follow this navigation path: SDUSD > Staff Portal > Applications & Support >IT Department > Select PeopleSoft from the IT Resources drop down menu. PeopleSoft FIN—Site Administrators

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To Deny Items

- In the line details, check line item(s) to deny.
- Scroll to the bottom of page and enter reason for denial in Enter Approver Comments. Important! .Required to deny items.
- 10. Click Deny.
- 11. Requisition Approval displays requisition status as *"See Lines"* indicating part of the order was denied.
- Denied item details display in Requisition Approval section. Click View/Hide Comments link, or expand Comments in denied line to view comments.
- Line items that were not denied are active and checked indicating further action is necessary. Follow Approval steps (6-7) to approve pending items, or click Return to Worklist link.

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