

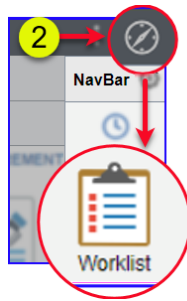
How to Manage eProcurement Requisitions

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**.

Worklist Items					
From	Date From	Work Item	Worked By Activity	Priority	Link
Kris Doe	02/14/2024	Approval Routing	Approval Workflow	2-Medium	Requisition_5951187_SDUSD_2021-09-03_N_0_BUSINESS_UNIT:SDUSD_REQ_ID:REQ532801
Kris Doe	02/14/2024	Approval Routing	Approval Workflow	2-Medium	Requisition_5951190_SDUSD_2021-09-03_N_0_BUSINESS_UNIT:SDUSD_REQ_ID:REQ532802

4. 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.

Requisition Approval

Business Unit: SDUSD
Requisition ID: REQ532801
Requisition Name: Staples Dry Erase markers Rm1
Requester: Kris Doe
Entered on: 02/14/2024
Status: Pending
Priority: Medium
Budget Status: Valid
Total Amount: 84.36 USD
Requester's Justification: No justification entered by requester.

[Header Comments](#) [View printable version](#)

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price
1	Expo Dry Erase Markers, Fine...	STAPLES DC-001	6.0000	DZ	8.66 USD
2	Expo Dry Erase Markers, Chis...	STAPLES DC-001	5.0000	DZ	6.48 USD

Select All / Deselect All

[View Line Details](#) Approve Deny

Review/Edit Approvers

Requisition Approval

Line 1: Pending
ABSENCE EXCUSE FOR PARENTS SIGN SECONDARY 5 X 3-1/2 IN PRINT 1 SIDE 2 PART NCR BLUE/WHITE 50 PER PK P/S#3371 STK # 22A0300
Department Approval - Single
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](#)

How to Manage eProcurement Requisitions

- 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.

Business Unit: SDUSD Requester: 180302 Status: Pending Approval
 Requisition: REQ532801 Requested By: Kris Doe Currency: USD
 Requisition Name: Staples Dry Erase markers Rm1 Entered Date: 2/14/24 Requisition Total: 84.36
 Header Comments:
 Chris Doe, Adams Elem, ph 858-622-5505, cdoe@sandi.net

Line	Item Description	Quantity
Line 1	Expo Dry Erase Markers, 12/Pack (86001)	6.0000

Ship Line: 1 Ship To: 5983A Address: Shipping Quantity: 6.0000
 Attention: Kris Doe Due Date: Supply Center Shipping Total: 51.96
 Ship Via: UPS REG Freight Terms: DESTIN 2351 Cardinal Ln BLDG K
 San Diego CA 92123-3743
 United States

- To approve items , continue to **next step**.
- To deny items, go to **Step 8**.

To Approve All Items

- Make sure items to approve are checked. Click **Approve**.

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price
<input checked="" type="checkbox"/>	1 Expo Dry Erase Markers, Fine...	STAPLES DC-001	6.0000	DZ	8.66 USD USD
<input checked="" type="checkbox"/>	2 Expo Dry Erase Markers, Chis...	STAPLES DC-001	5.0000	DZ	6.48 USD USD

Select All / Deselect All

- 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 Tip, Black, 12/Pack (86001)
 Department Approval - Single
 Approved
 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)
 Department Approval - Single
 Approved
 Kris Doe
 Single Approver for Dept
 03/07/24 - 10:43 AM

[Return to Worklist](#)

How to Manage eProcurement Requisitions

To Deny Items

8. In the line details, check line item(s) to deny.
9. 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.
12. Denied item details display in **Requisition Approval** section. Click **View/Hide Comments** link, or expand Comments in denied line to view comments.
13. 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.

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price
1	ABSENCE REPORT CANCELLATION	GRAPHIQUES	10.0000	PAD	2.00 USD
2	ABSENCE EXCUSE FOR PARENTS	GRAPHIQUES	15.0000	PK	3.00 USD

Buttons: Select All / Deselect All, View Line Details, Approve, Deny

Review/Edit Approvers
Requisition Approval

Enter Approver Comments
Found extra box of forms in storage closet. No longer needed on this req. Other item is OK

Requisition Approval

Business Unit: SDUSD
Requisition ID: REQ532803
Requester: Kris
Created on: 03/07/2024
Status: See Lines
Total Amount: 65.00 USD
Priority: Medium
Requester's Justification: Valid

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price
1	ABSENCE REPORT CANCELLATION	GRAPHIQUES	10.0000	PAD	2.00 USD
2	ABSENCE EXCUSE FOR PARENTS	GRAPHIQUES	15.0000	PK	3.00 USD

Buttons: Select All / Deselect All, View Line Details, Approve, Deny

Review/Edit Approvers
Requisition Approval

Line 1: Denied View/Hide Comments

Department Approval - Single

Denied
Alex Doe
Single Approver for Dept
03/07/24 - 11:07 AM

Comments
Alex Doe at 03/07/24 - 11:07 AM
Found extra box of Parent Absence Excuse forms in storage closet. No longer needed. Other item is OK

Line 2: Pending

Enter Approver Comments

Return to Worklist