

Procurement Services Training Manual

An Introduction to eProcurement and GeorgiaFIRST Marketplace

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Chapter 1: eProcurement and GeorgiaFIRST Marketplace Overview

What are eProcurement and the GeorgiaFIRST Marketplace?

eProcurement (ePro) is a module in PeopleSoft Financials that has a primary function of creating electronic requisitions and routing them for approval. In this PSFIN module, ePro is used to create requisitions for goods and services. A requisition is simply an official request to purchase goods and services.

Currently, we use paper requisitions to request an item to be purchased. The hardcopy requisition is routed for approval signatures, and then sent to the Purchasing Office. The Purchasing Office keys the information into the system to create a Purchase Order to send to the supplier.

With ePro, much of this is completely automated. A requisition is created within ePro and then electronically routed for approval. The approval chain is dependent on the Chartstring charged and item type, among other things. Finally, after the last electronic approval is made, the requisition can be copied into, or sourced into an official Purchase Order that is dispatched to a supplier.

The GeorgiaFIRST Marketplace takes the use of ePro to another level. The GeorgiaFIRST Marketplace is an online shopping site that is accessed from PeopleSoft Financials. Through this online shopping site, users can shop online for contract items from a variety of state and institution approved suppliers. Users can select items by placing them in an online shopping cart. They assign these shopping carts to a designated requester when ready, and the requester then turns their shopping cart into an ePro requisition.

Benefits of ePro and the GeorgiaFIRST Marketplace

With this new system of online shopping and electronic requisitioning, you will see some immediate benefits, including:

- Reduction in paper forms routing through different offices
- Online browsing and shopping for items
- Comparison shopping
- You only need one login to shop from multiple suppliers
- You can request goods from multiple suppliers through one shopping cart
- All items in the GeorgiaFIRST Marketplace are contractually approved items
- Faster routing for approvals
- Ability to save items as 'favorites' in the GeorgiaFIRST Marketplace

Types of Roles Involved

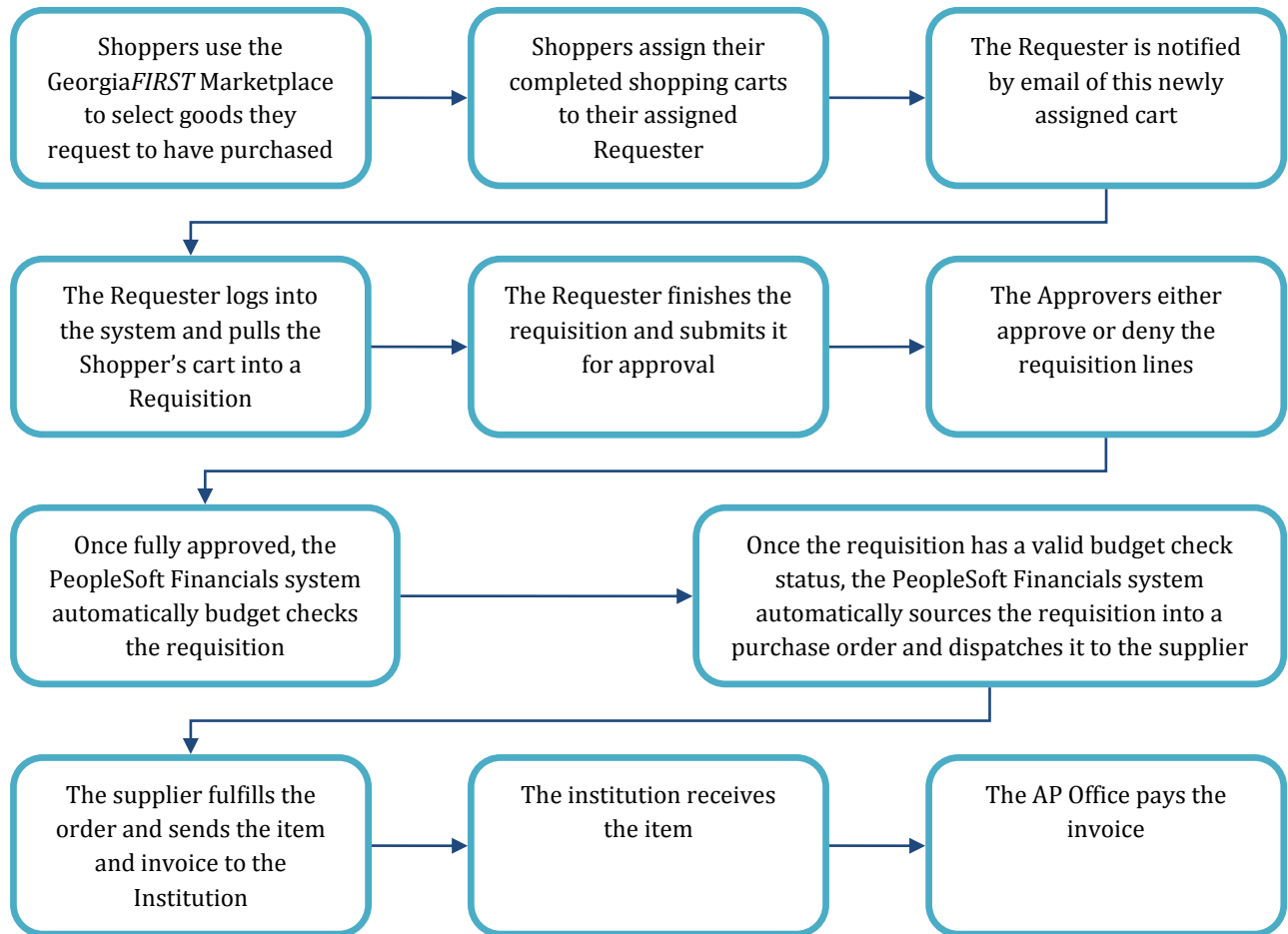
In order for the ePro and GeorgiaFIRST Marketplace functionality to work properly, users are set up with specific roles and responsibilities. They include:

- **Shoppers:** These users are the ones who select items in the GeorgiaFIRST Marketplace and place them into shopping carts to be assigned to their Requester.
- **Requesters:** These users take the shopping carts created by Shoppers and turn them into ePro Requisitions. Requesters can also build their own shopping carts, just like Shoppers.
- **Approvers:** These users are set up to approve ePro Requisitions.
- **Buyers:** These users are responsible for ensuring approved requisitions are sourced into a Purchase Order and dispatched to the supplier.
- **AP Personnel:** The AP office processes the resulting invoice from the supplier.
- **ePro Administrator:** This user monitors the approval workflow, to make sure requisitions are worked in a timely fashion
- **Local Security Administrator:** This user is responsible for setting up all users in their appropriate roles.

As a Requester, you are primarily responsible for creating ePro requisitions from shopping carts created in the GeorgiaFIRST Marketplace either created by you or by Shoppers to whom you are assigned. In addition, you are responsible for creating Special Requisitions, which are requisitions containing non-contract/non-catalog items and therefore, not initiated from a GeorgiaFIRST Marketplace shopping cart. Finally, you may be responsible for receiving items in the ePro system so that supplier invoices resulting from ePro requisitions can be paid.

Process Flow

Now that you know all of the roles involved, below is the process flow beginning with Shoppers and ending with the Accounts Payable office.



How does PSFIN pass along user information to GeorgiaFIRST Marketplace?

In order for you to begin using the GeorgiaFIRST Marketplace, your local security administrator first sets you up in the PeopleSoft Financials system, with the correct roles and authorizations. By using your PeopleSoft User ID and Password, you can access the PeopleSoft system. Once in PeopleSoft, you simply proceed to the GeorgiaFIRST Marketplace through a hyperlink.

By logging in through PeopleSoft, the system sends specific user information to the GeorgiaFIRST Marketplace, allowing you to log in only once and shop from multiple suppliers. In addition, your PeopleSoft User ID is used to store a set of default Chartfields that will be charged for your requested goods, unless otherwise specified.

How Do Approvals Work?

As mentioned earlier, once the Requester builds the requisition in ePro from a GeorgiaFIRST Marketplace shopping cart, the Requester submits it for approval. In ePro, approvals are completed through Workflow. The ePro module looks at certain values in the requisition and automatically routes it to all necessary approvers.

Once your requested items have been placed on a requisition and are routed for approvals, there are time limits in place in which each approver act on the requisition. This ensures that your requisition does not sit around waiting for a required approver for an indefinite amount of time.

When a requisition is submitted for approval, the system routes it to the appropriate approvers' Worklists accordingly, within PeopleSoft Financials. The Worklist is a queue which holds items waiting for approval. Once an approver works a transaction, it is removed from their Worklist.

Once the requisition hits an Approver's Worklist, that approver has 5 days to either approve or deny it, before they get a reminder notification from the system. If the requisition sits in an Approver's Worklist for 7 days without being approved or denied, the system removes the requisition from that Approver's Worklist, the transaction is escalated, and the ePro Administrator reassigns the transaction to another approver. After the Approver has approved the requisition, the system automatically moves it onto the next required Approver's Worklist. If an Approver denies a requisition, the system returns it to the Requester. Denied requisition lines can be edited and resubmitted for approval, or canceled if necessary.

Approval routings are based on the individual lines in a requisition. Below is a quick summary of how approvals flow for requisitions originating from the GeorgiaFIRST Marketplace:

- First, all requisitions are routed to a Department Manager for approval. The correct Department Manager is determined by the Department Chartfield used on the requisition line.
- If a Project or Grant is indicated on the requisition line also, then the line is routed to the assigned Project Manager for approval as well.

- The following approval steps are customizable by institution. Therefore, not all of these steps will apply to your requisition line.
 - Agency Fund Approval: If an agency fund is entered on a requisition line, the line will be routed to the approver responsible for approving agency fund transactions.
 - Amount Approval: If a requisition line is over a certain amount (i.e., \$10,000 or greater), it will be routed to a special approver responsible for approving these high-amount lines. This is specified by each institution.
 - Item Type Approvals: These approvals are determined by the type of item being requested through the requisition line account number, NIGP code, or both. The special item types include:
 - Assets
 - Audio Visual Equipment
 - IT Hardware and Software

For Special Requisitions (created for non-catalog/non-contract items not in the GeorgiaFIRST Marketplace), the approval chain can be slightly different. All requisitions are still routed to a Department Manager and Project Manager (if a project is indicated on the requisition line).

If an approver will be out of the office for an extended period of time and will be unable to work the requisitions in their Worklist, they have the ability to assign an alternate to serve in their place. This way, their Worklist does not build up while they are out of the office, and requisition approval is not delayed.

Chapter 2: Approving and Denying Requisitions

In this lesson, we will walk you through the details of how to approve or deny a requisition line assigned to you.

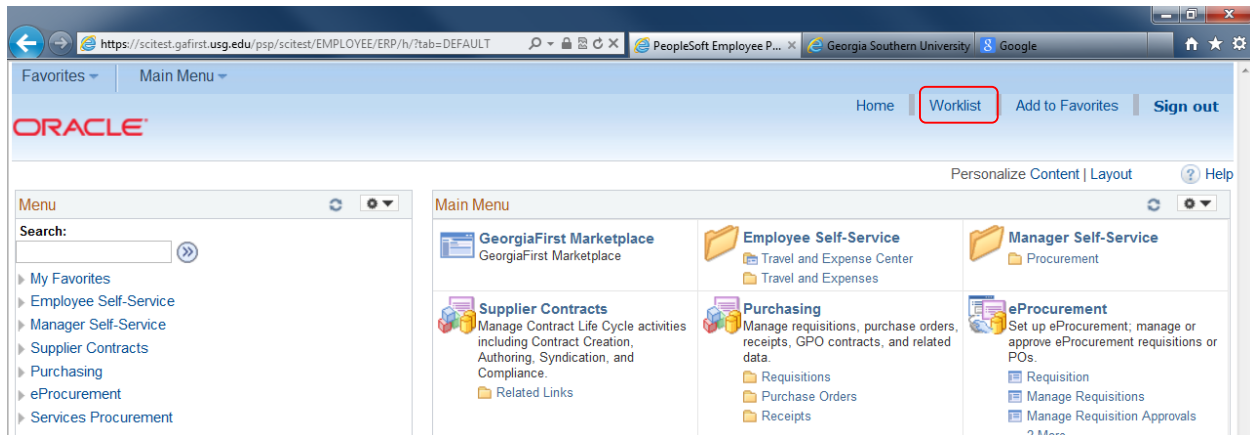
Let's log into PeopleSoft FPlay :

<https://fplay.gafirst.usg.edu/psp/fplay/?&cmd=login&errorCode=105&languageCd=ENG>

Retrieving Your Worklist

When a requisition line has been routed to you for approval, it will appear in your Worklist. You will also be notified via email that a requisition is awaiting your action. You can access your Worklist from the home page in PeopleSoft Financials Core system. Keep in mind that to approve requisitions, you must be in the Core system and not the Self Service system (used for Expenses).

After entering your PeopleSoft User ID and Password, you can sign into the system. Remember, your User ID and Password are case sensitive. Also, if you attempt to sign-in five times with the incorrect login information, the system will lock you out. To unlock your account, notify your Local Security Administrator.



You can access the Worklist through either the link in the upper right corner of the page or in the Main Menu.

Reviewing Your Worklist

ORACLE							
All		Search		Advanced Search			
Worklist							
Worklist for jbaraby: Barnaby,James							
Detail View		Worklist Filters		Feed			
Worklist Items							
From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
Cody,Susan	11/06/2015	Approval Routing	Approval Workflow	2-Medium	Requisition_3345800.71000.1906-01-01.N.0.BUSINESS_UNIT:71000.REQ_ID:0000502647.	Mark Worked	Reassign
Whitaker,Julius E	11/06/2015	Approval Routing	Approval Workflow	2-Medium	Requisition_3332588.71000.1906-01-01.N.0.BUSINESS_UNIT:71000.REQ_ID:0000502190.	Mark Worked	Reassign
Bryant,Robert G	11/06/2015	Approval Routing	Approval Workflow	2-Medium	Requisition_3340320.71000.1906-01-01.N.0.BUSINESS_UNIT:71000.REQ_ID:0000502603.	Mark Worked	Reassign
Johnson,Sonya L.	11/06/2015	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_385268.71000.1901-01-01.N.0.BUSINESS_UNIT:71000.PO_ID:0000512381.	Mark Worked	Reassign
Williams,Aprille J	11/06/2015	Approval Routing	Approval Workflow	2-Medium	Requisition_3346160.71000.1906-01-01.N.0.BUSINESS_UNIT:71000.REQ_ID:0000502649.	Mark Worked	Reassign
Johnson,Sonya L.	11/06/2015	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_384435.71000.1901-01-01.N.0.BUSINESS_UNIT:71000.PO_ID:0000512188.	Mark Worked	Reassign

Your Worklist is separated into different columns. First, the person who submitted the requisition is listed in the “**From**” Column. The “**Date From**” column indicates when the requisition was submitted. The “**Work Item**” column indicates what action is required. The “**Priority**” column is not used. And the “**Link**” column displays the link to the Requisition needing approval. Note that the “**Reassign**” button has been inactivated on this page.

On your Worklist, you can sort the page by clicking on a column heading. For example, if you wanted to sort your Worklist by the Requester, you would click the “**From**” column heading.

In each Requisition link, there are certain pieces of information used to identify it. The link begins with the type of transaction needing approval, “**Requisition**” in the example below. Your institution’s Business Unit and the transaction ID is also listed. In the example, the Requisition ID is 0000502647. To go to the Requisition Approval page, simply click on that Requisition link.

[Requisition_3345800.71000.1906-01-01.N.0.BUSINESS_UNIT:71000.REQ_ID:0000502647.](#)

Requisition Approval

Business Unit 71000
 Requisition ID 0000502647
 Requisition Name FY2016 GVargis Order #3
 Requester Brown, Mary Nancy
 Entered on 11/06/2015
 Status Pending
 Priority Medium
 Budget Status Not Checked

Requisition Alert
 •Special Request Requisition

Total Amount 182.46 USD

Requester's Justification
 Need by November 30 for final exams.

[Edit Requisition](#) [View printable version](#)

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Com
1	882-E Scantron Answer Sheet,...	SCANTRONCO-001	1.0000	PKG	65.95000 USD	
2	X-101864-PAR-L ParScore Comb...	SCANTRONCO-001	2.0000	PKG	52.00000 USD	
3	Shipping/Freight Cost	SCANTRONCO-001	1.0000	FEE	12.51000 USD	

Select All / Deselect All
[View Line Details](#)

Review/Edit Approvers

Enter Approver Comments

Approve Deny

[Return to Worklist](#)

Here's a brief description of what is on the **Requisition Approval** page:

- If the Requester gave the requisition a specific name, it will be listed. If not, the Requisition ID will be listed next to Req Name.
- The Requisition total amount is listed.
- The Requester is listed. If you select the Requester's Name link, the system will display the Requester's Name, Employee ID and Department.
- The date the Requisition was entered in the system is listed.
- The Requisition Status is listed.
 - Pending: The requisition is pending approval
- Requester entered a business purpose, it will be listed under Requester's Justification **(mandatory)**.
- The Business Unit, Requisition ID, and Priority are also listed.

- For some approvers, the “Edit Requisition” button will be available above the Line Information section so that they can modify the requisition. After an approver modifies and saves the requisition, Workflow approvals may need to be restarted, depending on their role action security.

Requisition Approval

Business Unit 71000
 Requisition ID 0000502647
 Requisition Name FY2016 GVargis Order #3
 Requester Brown, Mary Nancy
 Entered on 11/06/2015
 Status Pending
 Priority Medium
 Budget Status Not Checked

Requisition Alert
 •Special Request Requisition

Total Amount 182.46 USD

Requester's Justification
 Need by November 30 for final exams.

[View printable version](#)

Line Information Personalize | Find | ^[2] First 1-3 of 3 Last

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Com
1	882-E Scantron Answer Sheet...	SCANTRONCO-001	1.0000	PKG	65.95000 USD	
2	X-101864-PAR-L ParScore Comb...	SCANTRONCO-001	2.0000	PKG	52.00000 USD	
3	Shipping/Freight Cost	SCANTRONCO-001	1.0000	FEE	12.51000 USD	

Select All / Deselect All

In the **Line Information** section, the system will display all requisition lines you are required to act upon. The ‘clock’ icon indicates the line is pending your approval.

Line Information Personalize | Find | ^[2] First 1-3 of 3 Last

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Com
1	882-E Scantron Answer Sheet...	SCANTRONCO-001	1.0000	PKG	65.95000 USD	
2	X-101864-PAR-L ParScore Comb...	SCANTRONCO-001	2.0000	PKG	52.00000 USD	
3	Shipping/Freight Cost	SCANTRONCO-001	1.0000	FEE	12.51000 USD	

Select All / Deselect All

If you select the Item Description’s hyperlink in a line, the **Item Description** page is displayed.

882-E Scantron Answer Sheet; 100Q 5 Chc Alpha (500/PKG)

No Image Available

Req Price 65.95000
 Item ID
 Category Examination and Testing
 Supplier SCANTRON CORPORATION
 Supplier Item ID N/A
 Manufacturer N/A
 Mfg Itm ID N/A
 Long Description See attachment for price quote.

[Return to Previous Page](#)


The **Item Description** page will list the item **price**, **category**, and **supplier** if listed. Select the “**Return to Previous Page**” link to return to the Requisition Approval page.

To see the **line details**, select the requisition line through its **checkbox** and then select the **View Line Details** button. You can select multiple lines at one time to view those line details simultaneously.

Business Unit: 71000		Requester: mnbrown		Status: Pending Approval			
Requisition: 0000502647		Requested By: Brown, Mary Nancy		Currency: USD			
Requisition Name: FY2016 GVargis Order #3		Entered Date: 11/6/15		Requisition Total: 182.46			
Header Comments: See attached price quote from Scantron. Need by November 30 for final exams.							
Line: 1	Item Description: 882-E Scantron Answer Sheet; 100Q 5 Chc Alpha (500/PKG)	Quantity: 1.0000	UOM: PKG	Price: 65.95	Line Total: 65.95		
					Line Status: Pending		
Line Comments: <<See attachment for price quote.>>							
Ship Line: 1		Ship To: CB2200		Shipping Quantity: 1.0000			
Attention: Mary Brown		Due Date: 11/30/15		Shipping Total: 65.95			
Ship Via: VENDOR		Freight Terms: FOB:DEST		Georgia Perimeter College 555 North Indian Creek Dr. Building CB Room 2200 Clarkston GA 30021 United States			
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	CB2200	1.0000	100.00	65.95	71000	751110
Dept	Fund	Program	Class	Budget Ref			
0101100	10000	11100	11000	2016			
Open QTY	Open Amt						
1.0000	0.000						
GL Base Amount	Currency	Sequence					
65.95	USD	0					

A new window will open and the **shipping and distribution** information will be displayed. You will be able to see the **Chartfields** that are charged for that requisition line. When you are done reviewing the line details, you can close the pop-up window.

The “Requester’s Comments” call-out icon appears for those lines that have line comments or attachments. To review these comments, you can select the call-out icon.

Line Information								
Line	Item Description	Supplier Name	Quantity	UOM	Price			Comments
1	882-E Scantron Answer Sheet,...	SCANTRONCO-001	1.0000	PKG	65.95000	USD		

Here, you can review the line comments and attachments. To return to the line information, select the “Return to Previous Page” link.

Requisition Comments

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price		
1	882-E Scantron Answer Sheet,...	SCANTRONCO-001	1.0000	PKG	65.95000	USD	

Comments




<<See attachment for price quote.>>

Attachments

Filename	View	Send to Supplier
1 Scantron_Price_Quote.pdf	View	<input type="checkbox"/>

[Return to Previous Page](#)

To see the approval path for a requisition, select the “**expand**” icon next to **Review/Edit Approvers**.

Line Information								
Line	Item Description	Supplier Name	Quantity	UOM	Price			Comments
1	882-E Scantron Answer Sheet,...	SCANTRONCO-001	1.0000	PKG	65.95000	USD		
2	X-101864-PAR-L ParScore Comb...	SCANTRONCO-001	2.0000	PKG	52.00000	USD		
3	Shipping/Freight Cost	SCANTRONCO-001	1.0000	FEE	12.51000	USD		

Select All / Deselect All

Review/Edit Approvers

Department and Proj. Approval

Line 1: Awaiting Further Approvals + Start New Path

882-E Scantron Answer Sheet; 100Q 5 Cnc Alpha (500/PKG)

Department and Proj. Approver

Approved

✓ Cody,Susan
 Req-Dept Mgr-Line Level
 11/06/15 - 3:49 PM

Line 2: Awaiting Further Approvals + Start New Path

X-101864-PAR-L ParScore Combo 8000/888P (500/PKG)

Department and Proj. Approver

Approved

✓ Cody,Susan
 Req-Dept Mgr-Line Level
 11/06/15 - 3:49 PM

Line 3: Awaiting Further Approvals + Start New Path

Shipping/Freight Cost

Department and Proj. Approver

Approved

✓ Cody,Susan
 Req-Dept Mgr-Line Level
 11/06/15 - 3:49 PM

Logistical Services Approval

FY2016 GVargis Order #3: Pending Request Information + Start New Path

Purchasing Manager Approval

Pending

⌚ Multiple Approvers
 Buyer Approval + Start New Path

Enter Approver Comments

✓ Approve

✗ Deny

The **Review/Edit Approvers** section expands and lists all approvers that have acted or need to act on a requisition. In addition, there will be an approval path for each requisition line, since each line can have a different set of approvers depending on their Chartfields and item type.

Under the approval path, you can enter any comments that you wish to attach to the requisition. Do not include any slashes (/) in your comments.

When you are ready to act on the requisition, you can select your requisition lines and then click the **Approve** or **Deny** button.

Once approved, the **Requisition Approval** page should update indicating that you have completed your approval action.

Requisition Approval

Confirmation

✓ **FY2016 GVargis Order #3 has been approved.**

Review/Edit Approvers

Department and Proj. Approval

Line 1: **Approved**
882-E Scantron Answer Sheet, 100Q 5 Chc Alpha (500/PKG)

Department and Proj. Approver

Approved
✓ Cody,Susan
Req-Dept Mgr-Line Level
11/06/15 - 3:49 PM

Line 2: **Approved**
X-101864-PAR-L ParScore Combo 8000/888P (500/PKG)

Department and Proj. Approver

Approved
✓ Cody,Susan
Req-Dept Mgr-Line Level
11/06/15 - 3:49 PM

Line 3: **Approved**
Shipping/Freight Cost

Department and Proj. Approver

Approved
✓ Cody,Susan
Req-Dept Mgr-Line Level
11/06/15 - 3:49 PM

Logistical Services Approval

FY2016 GVargis Order #3: **Approved**

Purchasing Manager Approval

Approved
✓ Barnaby,James
Buyer Approval
11/10/15 - 9:54 AM

[Return to Worklist](#)

A requisition line will go to “**approved**” once all approvers have acted on it. Until then, the Requisition Status is still **Pending**.

To return to your Worklist to work another requisition, select the **Return to Worklist** link.

[How To: Access your Worklist](#)

1. Log into PeopleSoft Financials Core System with your **User ID** and **Password**.
2. Click the **Worklist** hyperlink in the upper right corner of the home page.
3. Click a **Requisition link** under the “link” column to display a requisition.

[How To: Approve a Requisition](#)

1. Select the **requisition** from your **Worklist**.
2. Review each line item’s descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item’s details by selecting them with a **checkmark** and clicking the **View Line Details** button.
4. Review the **approval path** if desired. You can insert additional approvers if needed (see lesson #).
5. Enter any **comments** you wish to add to the requisition. Do not include any slashes (/) in the comments field.
6. Select the lines you want to approve with a **checkmark** and then click the **Approve** button.
7. After receiving the approval confirmation, click the **Return to Worklist** link.

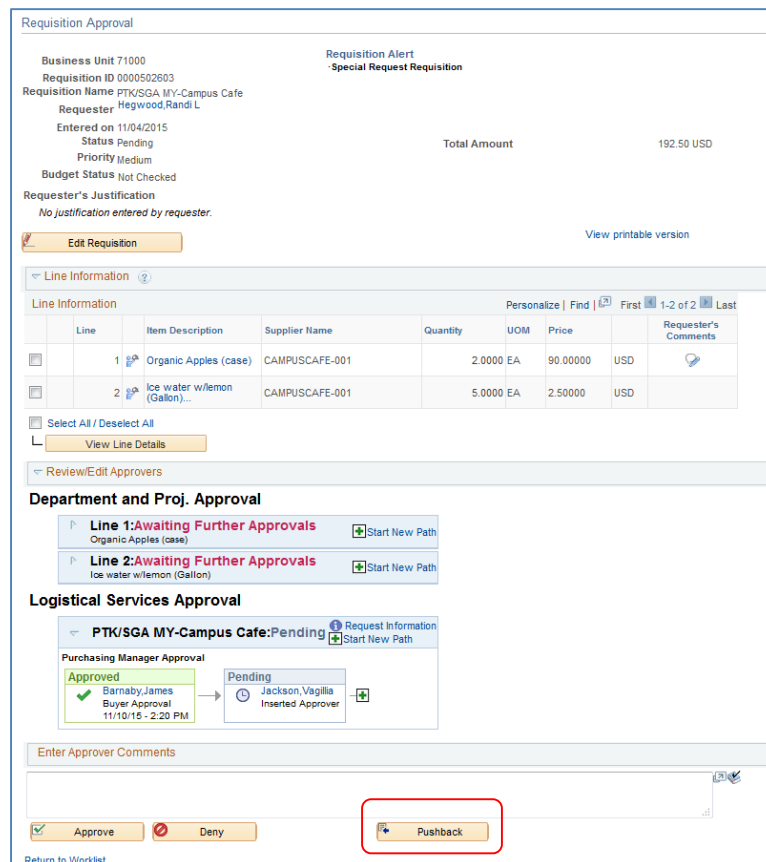
[How To: Deny a Requisition](#)

1. Select the **requisition** from your **Worklist**.
2. Review each line item’s descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item’s details by selecting them with a **checkmark** and clicking the **View Line Details** button.
4. Review the **approval path** if desired.
5. Enter **comments** explaining why you are denying the requisition. Do not include any slashes (/) in the comments field.
6. Select the **lines** you want to deny with a **checkmark** and then click the **Deny** button.
7. After receiving the denial confirmation, click the **Return to Worklist** link.

Requisition Push Back

All approvers can approve or deny a requisition that is submitted to them. Some approvers also have the ability to push a requisition back to the previous approver. This may be necessary if an approver has additional questions about a requisition. Initial approvers for a requisition will be unable to push back a requisition since there are no previous approvers in the approval path. Project approvers and inserted ad hoc approvers can use the push back function.

When you push back a requisition, it places that requisition back into a Pending status for that approval step. If you receive a requisition that was pushed back, you will be required to approve it again or deny it.



The screenshot displays the 'Requisition Approval' interface. At the top, it shows 'Business Unit 71000', 'Requisition ID 0000502803', and 'Requisition Name PTK/SGA MY-Campus Cafe'. The status is 'Pending' with a total amount of '192.50 USD'. Below this is a table with two line items: 'Organic Apples (case)' and 'Ice water w/lemon (Gallon)'. The 'Review/Edit Approvers' section shows a 'Purchasing Manager Approval' path where 'Barnaby, James' (Buyer Approval) has approved and 'Jackson, Vagilla' (Inserted Approver) is currently pending. At the bottom, there are three buttons: 'Approve', 'Deny', and 'Pushback'. The 'Pushback' button is highlighted with a red rectangle.

In the example above, you can see the **Pushback** button. As the approver, you could push the requisition back to the first approver. When you push back a requisition, you will be required to enter **comments** explaining why you are pushing the requisition back. Do not include any slashes (/) in the comments field. After pushing it back, you will receive confirmation the requisition has been pushed back to the previous approver.

Requisition Approval

Confirmation

PTK/SGA MY-Campus Cafe has been pushed back to the previous approver.

Review/Edit Approvers

Department and Proj. Approval

Line 1: **Awaiting Further Approvals**
Organic Apples (case)

Department and Proj. Approver

Approved
Bryant, Robert G
Req-Dept Mgr-Line Level
11/08/15 - 3:22 PM

Line 2: **Awaiting Further Approvals**
Ice water w/lemon (Gallon)

Department and Proj. Approver

Approved
Bryant, Robert G
Req-Dept Mgr-Line Level
11/08/15 - 3:22 PM

Logistical Services Approval

PTK/SGA MY-Campus Cafe: Pending [View/Hide Comments](#)

Purchasing Manager Approval

Pending
Multiple Approvers
Buyer Approval

Pushed Back
Jackson, Vagilia
Inserted Approver
11/10/15 - 2:30 PM

Comments

[Return to Worklist](#)

As the approver who receives a pushed back requisition, you will easily be able to see that it was pushed back and you can review the comments to determine why it was pushed back.

Requisition Approval

Business Unit 71000
 Requisition ID 0000502603
 Requisition Name PTK/SGA MY-Campus Cafe
 Requester Hegwood,Randi L
 Entered on 11/04/2015
 Status Pending
 Priority Medium
 Budget Status Not Checked
 Requisition's Justification
 No justification entered by requester.

Total Amount 192.50 USD

Requisition Alert
 -Special Request Requisition
 -This requisition was pushed back to you. Review previous approver comments for details.

[Edit Requisition](#) [View printable version](#)

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments
1	Organic Apples (case)	CAMPUSCAFE-001	2.0000	EA	90.00000 USD	
2	Ice water w/lemon (Gallon)...	CAMPUSCAFE-001	5.0000	EA	2.50000 USD	

Department and Proj. Approval

Line 1: Awaiting Further Approvals
 Organic Apples (case)
 Department and Proj. Approver
 Approved
 Bryant,Robert G
 Req-Dept Mgr-Line Level
 11/06/15 - 3:22 PM

Line 2: Awaiting Further Approvals
 Ice water w/lemon (Gallon)
 Department and Proj. Approver
 Approved
 Bryant,Robert G
 Req-Dept Mgr-Line Level
 11/06/15 - 3:22 PM

Logistical Services Approval

PTK/SGA MY-Campus Cafe: Pending
 Purchasing Manager Approval
 Pending Multiple Approvers Buyer Approval
 Pushed Back Jackson,Vagillia Inserted Approver
 11/10/15 - 2:30 PM

Comments
 Vagillia Jackson at 11/10/15 - 2:30 PM
 Please double check the price on this item.

You can then perform the necessary actions and either approve or deny the requisition. If you approve it, it will proceed on the approval path.

Requisition Approval

Confirmation

✔ PTK/SGA MY-Campus Cafe has been routed for further approval.

Review/Edit Approvers

Department and Proj. Approval

Line 1: **Awaiting Further Approvals**
Organic Apples (case)

Line 2: **Awaiting Further Approvals**
Ice water w/lemon (Gallon)

Logistical Services Approval

PTK/SGA MY-Campus Cafe: Pending [View/Hide Comments](#)

Purchasing Manager Approval

Approved ✔ Barnaby, James Buyer Approval 11/10/15 - 2:33 PM	→	Pending ⌚ Jackson, Vagillia Inserted Approver
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Comments

[Return to Worklist](#)

[How to Push Back a Requisition to the Previous Approver](#)

1. Select the **requisition** from your **Worklist**.
2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item's details by selecting them with a checkmark and clicking the **View Line Details** button.
4. Review the approval path if desired.
5. Enter **comments** as to why you are pushing the requisition back to the previous approver. Do not include any slashes (/) in the comments field.
6. Select the lines you want to push back with a checkmark and then click the **Push Back** button.
7. After receiving the Push Back confirmation, click the **Return to Worklist** link.

Chapter 4: Worklist Maintenance

As a requisition approver, you are responsible for approving the purchase of items. If you are unable to perform this task due to the fact you may be out of the office on leave or out of town, you can assign an alternate approver while you are away.

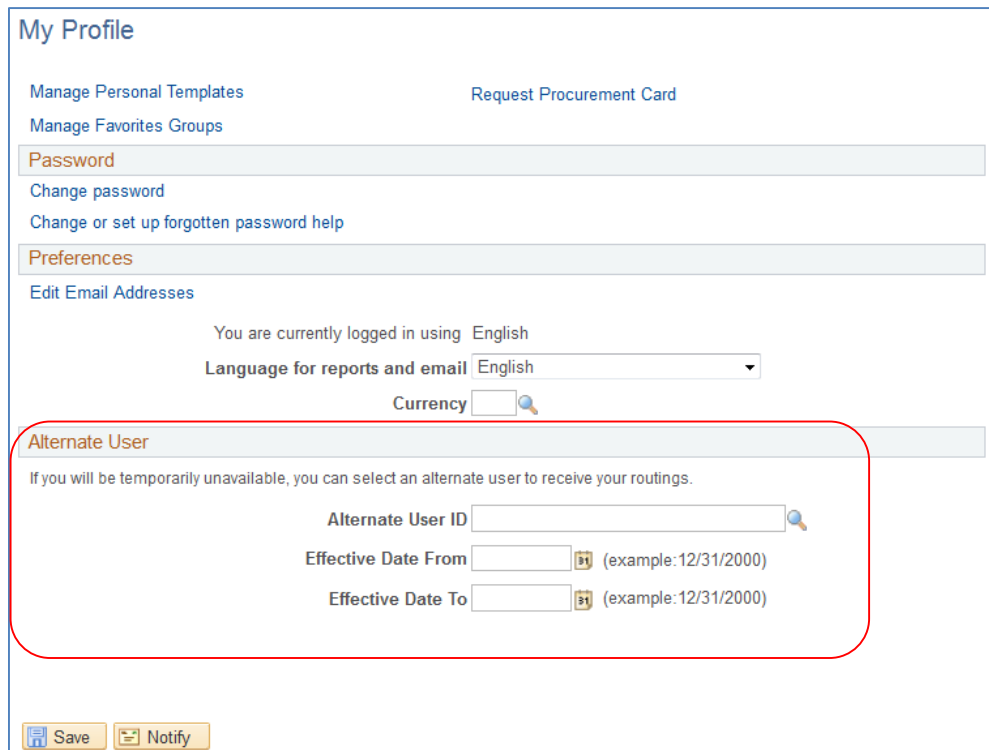
Assigning an Alternate Approver

When you assign an alternate approver, you are telling the system whenever your Worklist receives new requisitions to work, you want them routed to the alternate approver during the time frame specified. The system will then automatically forward any new Worklist items to your Alternate User during that specified time. You will not be able to reassign the items already in your Worklist.

When you specify the start and end dates for your alternate approver, the times that those dates go into effect begin at midnight. For example, imagine that you set up an alternate approver to take your requisitions from May 2, 2015 through May 7, 2015. Any new requisitions after 12:00 a.m. on May 2nd will automatically be routed to your alternate approver's worklist. This will continue for all requisitions until 11:59 p.m. on May 7th. After that, the new requisitions will again route to your worklist.

You will need to work with your Local Security Administrator to ensure that the alternate approver you wish to assign has the proper security setup needed to work the requisitions. They will need the same approval authority that you have. Otherwise, they will not be able to access the requisition.

You set up your alternate approver through **eProcurement > My Profile**.



My Profile

[Manage Personal Templates](#) [Request Procurement Card](#)

[Manage Favorites Groups](#)

Password

[Change password](#)

[Change or set up forgotten password help](#)

Preferences

[Edit Email Addresses](#)

You are currently logged in using English

Language for reports and email

Currency

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID

Effective Date From (example: 12/31/2000)

Effective Date To (example: 12/31/2000)

How To: Assign an Alternate Approver

1. In PeopleSoft Financials Core System, select **eProcurement** in the menu.
2. Select **My Profile**.
3. Select the **Alternate User ID** look up icon.
4. Search for your alternate user by either **User ID** or name (Description).
5. Select your alternate user by clicking on their **User ID**.
6. Enter the **Effective Date From**.
7. Enter the **Effective Date To**.
8. Click the **Save** button.

Ad Hoc Approvers

eProcurement gives you the ability to insert additional approvers if you feel it is necessary. After reviewing a requisition's approval path, you can insert additional approvers if you have the **BOR_AD_HOC_APPROVE** security role.

While you are reviewing the approval path for a requisition, you can insert the ad hoc approver wherever you see a **green plus sign (+)**.

ORACLE All Search >> Advanced Search

Requisition Approval

Business Unit 71000
 Requisition ID 0000502603
 Requisition Name PTK/SGA MY-Campus Cafe
 Requester Hegwood,Randi L
 Entered on 11/04/2015
 Status Pending
 Priority Medium
 Budget Status Not Checked

Requisition Alert
 •Special Request Requisition

Total Amount 192.50 USD

Requester's Justification
No justification entered by requester.

[Edit Requisition](#) [View printable version](#)

Line Information Personalize | Find | First 1-2 of 2 Last

Line	Item Description	Supplier Name	Quantity	UOM	Price	Requester's Comments
1	Organic Apples (case)	CAMPUSCAFE-001	2.0000	EA	90.00000 USD	
2	Ice water w/lemon (Gallon)...	CAMPUSCAFE-001	5.0000	EA	2.50000 USD	

Select All / Deselect All [View Line Details](#)

Review/Edit Approvers

Department and Proj. Approval

- Line 1: Awaiting Further Approvals (Organic Apples (case)) [Start New Path](#)
- Line 2: Awaiting Further Approvals (Ice water w/lemon (Gallon)) [Start New Path](#)

Logistical Services Approval

PTK/SGA MY-Campus Cafe: Pending Request Information | Start New Path

Purchasing Manager Approval

Pending

- Multiple Approvers [+](#)
- Buyer Approval

After clicking the green plus sign where you want to insert the additional approver, the system will display a pop-up box where you can select the ad hoc approver.

Start new approval path

Choose an approver or reviewer to insert

User ID: [🔍](#)

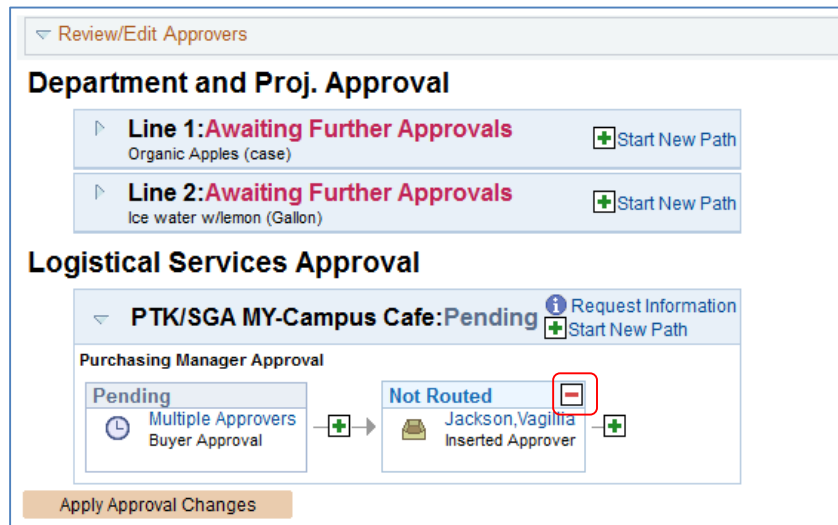
Insert as: Approver Reviewer

[Insert](#) [Cancel](#)

If you select the User ID look up icon, you will be able to search for the approver by User ID or by name. After selecting the additional approver, you can specify whether you want that approver to be inserted as an **Approver** or a **Reviewer**.

- Approver: If you select another person to be an approver, that person will be required to approve the requisition before it can move onto the next step.
- Reviewer: If you select another person to be a reviewer, that person will see the requisition in their Worklist, but they will not need to approve the requisition line.

If you have inserted an approver and then decide to remove them, you must do this before you approve the requisition.



To remove a user you added as an Ad Hoc approver, select the **red minus sign (-)** in that person's approval box.

When you insert another person in the approval path for a requisition, that user will need to proper 'approver' security setup in the system to work the requisition. If you unsure if the user has the correct security setup, contact that user and your Local Security Administrator.

[How To: Insert Ad Hoc Approver](#)

1. Select the **requisition** from your **Worklist**.
2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item's details by selecting them with a checkmark and clicking the **View Line Details** button.
4. Review the **approval** path.
5. Click the **green plus sign (+)** where you want to insert the ad hoc approver.
6. Click the **User ID** look up icon in the pop-up window.
7. **Search** for the name or User ID of the approver you want to add. Click on that person's name.
8. Select either **Approver** or **Reviewer**.
9. Click the **Insert** button.
10. Click the **Apply Approval Changes** button.

11. Enter any **comments** you wish to add to the requisition. Do not include any slashes (/) in the comments field.
12. Select the lines you want to approve with a checkmark and then click the **Approve** button.
13. After receiving the approval confirmation, click the **Return to Worklist** link.

