Approve or Deny eProcurement Requisitions
Manage Your Staff's ePro Orders

This Job Aid shows how to view, approve, and/or deny orders for goods and services placed by your staff using PeopleSoft eProcurement online. Please be aware of this general information:

- **Standard Catalog** orders *(stock/inventory)* can take a few days to several weeks to arrive, depending on whether they are in stock or on back order.

- **Web Direct Connect** orders *(Office Depot, Waxie, etc.)* usually take 1-5 days to arrive.

- **Special Request** orders can take anywhere from 1 week to a month or more, depending on many variables *(who the supplier is, where it's coming from, if it's a custom order, etc.)*

Important Note for Your Protection: It is against district policy, and is actually a ***fraudulent action***, to have anyone else login to PeopleSoft using your personal Employee ID and password, in order to approve ePro requisition orders for you. Do not share your login ID or password with anyone else. If you do, the person you give it to can access, view and change your personal information such as your **Social Security number**, birthdate, paycheck, and home address. It has happened to other site administrators.

1. Login to SDUSD's PeopleSoft Financial web site, with your Employee ID (User ID) and password. Go online to: **www.sandi.net —> Staff —> Applications —> PeopleSoft Financial**
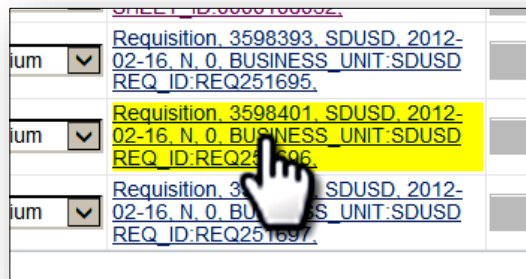
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2. In the upper right corner, click your **Worklist** link. (*Note:* *This link is only to be used for working with eProcurement requisitions… not Travel Expense forms*).
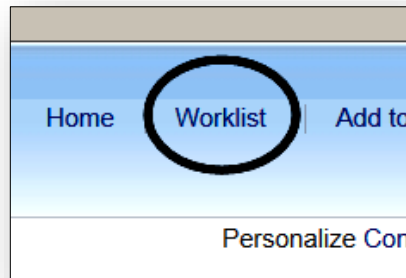
3. Click the link for the requisition you want to view.

4. The requisition is displayed. At the top, general information about the order is listed.

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5. The entire screen shows who placed the order and on which date; its current status; the total dollar amount before sales tax; what item is being ordered; and that this requisition is awaiting ("pending") your approval.

Your next step is to click the **View Line Details** button.

Requisition Approval

Business Unit	SDUSD
Requisition ID	REQ251695
Requisition Name	Report Card Folders
Requester	Leslie Doe
Entered on	08/07/2014
Status	Pending
Priority	Medium
Budget Status	Valid

Total Amount 125.00 USD

Requester's Justification

No justification entered by requester.

Click View Line Details

View printable version

Line Information (?)

Line Information

Personalize | Find | First 1 of 1 Last

		Line	Item Description	Supplier Name	Quantity	UOM	Price
☑	⏱	1	FOLDER FILE REPORT CARD 5 X ...	GRAPHIQUES	10.0000	PK	12.50000 USD

☑ Select All / Deselect All

View Line Details   ☑ Approve   🚫 Deny

Review/Edit Approvers

Requisition Approval

Line 1:Pending
FOLDER FILE REPORT CARD 5 X 17 IN (100/PK) 22F5700

Department Approval - Single

Pending
⏱ Alex Doe
Single Approver for Dept

Enter Approver Comments

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6. Important details about the order are displayed in a separate window. This includes which budget string will be used to pay for the item(s). The budget string was entered manually by the Requester when he/she created the requisition. When you're done viewing this, simply click on its window tab to close this window. Be careful not to accidentally close the entire browser window.

> Click to close only the "Requisition" tab. Leave the "Worklist" tab alone.

Worklist   Requisition   ×

rites Tools Help

Business Unit: SDUSD	**Requester:** 120080	**Status:** Pending Approval
Requisition: REQ251695	**Requested By:** Leslie Doe	**Currency:** USD
Requisition Name: Report Card Folders	**Entered Date:** 8/7/14	**Requisition Total:** 125.00

Line: 1	**Item Description:** FOLDER FILE REPORT CARD 5 X 17 IN (100/PK) 22F5700	**Quantity:** 10.0000	**UOM:** PK	**Price:** 12.50	**Line Total:** 125.00
					Line Status: Pending

Ship Line: 1	**Ship To:** 5983A	**Address:**	**Shipping Quantity:** 10.0000
Attention: Leslie Doe	**Due Date:**	Supply Center 2351 Cardinal Ln BLDG K San Diego CA 92123-3743 United States	**Shipping Total:** 125.00

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	0003A	10.0000	100.00	125.00	SDUSD	4301

Dept	Fund	Program	Class	Budget Ref
0003	01000	1000	1110	00

Open QTY	Open Amt
10.0000	0.000

GL Base Amount	Currency	Sequence	Capitalize
125.00	USD	0	N

Chartfield 1	Chartfield 2
00000	0000

7. To approve the requisition and send it on to be processed, click the **Approve** button.

☑ Select All / Deselect All

└─ View Line Details   ☑ Approve   🚫 Deny

▼ Review/Edit Approvers
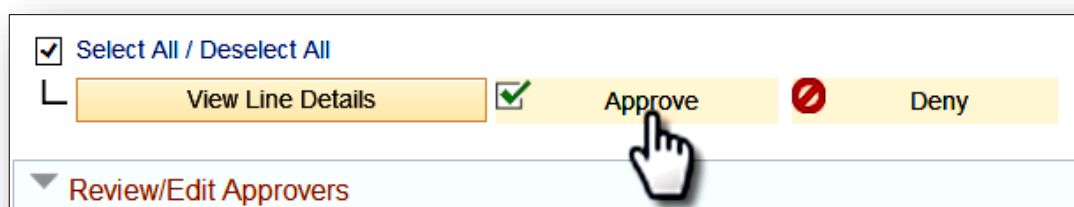
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8. Your approval confirmation is displayed. To return to your Worklist to view additional requisitions that were submitted to you, click "**Return to Worklist**" in the lower left corner. Or, if you're finished, navigate elsewhere or sign out of PeopleSoft.

Deny One Item and Approve the Rest

1. You can deny one or more individual items on an ePro requisition, and approve the rest of them. Here's how: Once you have the requisition opened on your screen from your Worklist, click to remove all the checkmarks from the line items you *do* want to approve; and leave the checkmark for the item you want to **_deny_**. It will turn gray, while the rest of the items will stay yellow.

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2. Scroll to the very bottom of the screen. In the **Enter Approver Comments** textbox, type a reason why you're denying the item. *(The system won't allow you to deny it without typing a comment first)*.

3. After typing your comment, scroll back up and click the **Deny** button.

4. Lastly, once you see that the rest of the items have been given their checkmarks again, click the **Approve** button to approve the rest, and to send the requisition off to be processed.
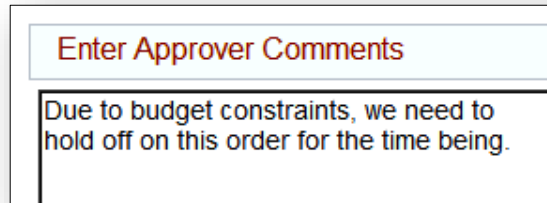
Deny an Entire Requisition

1. To deny an entire requisition, once you have the requisition opened and displayed on your screen, scroll down to the very bottom. In the **Enter Approver Comments** textbox, type a reason why you're denying the requisition. *(The system won't allow you to deny it without typing a comment first).*
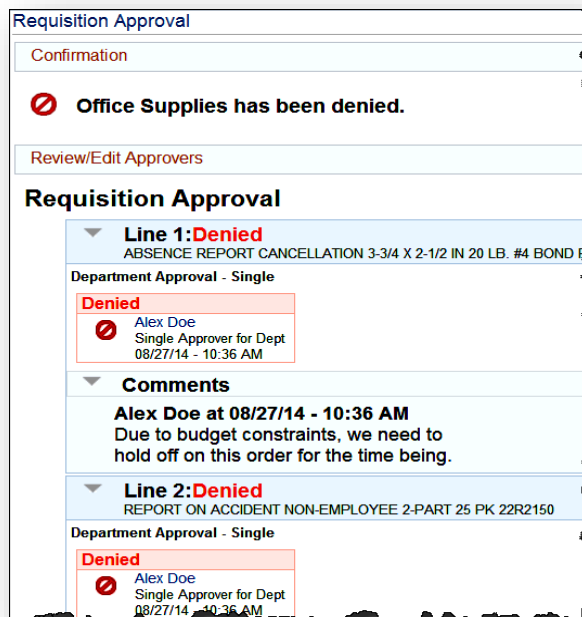
Enter Approver Comments

Due to budget constraints, we need to hold off on this order for the time being.

2. After typing your comment, scroll back up and click the **Deny** button.

Approve   🚫   Deny

3. The denial confirmation page is displayed. From here, you can navigate elsewhere in PeopleSoft, or else sign out.

Requisition Approval

Confirmation

🚫 **Office Supplies has been denied.**

Review/Edit Approvers

Requisition Approval

Line 1:Denied
ABSENCE REPORT CANCELLATION 3-3/4 X 2-1/2 IN 20 LB. #4 BOND P
Department Approval - Single

Denied
🚫 Alex Doe
Single Approver for Dept
08/27/14 - 10:36 AM

Comments
Alex Doe at 08/27/14 - 10:36 AM
Due to budget constraints, we need to hold off on this order for the time being.

Line 2:Denied
REPORT ON ACCIDENT NON-EMPLOYEE 2-PART 25 PK 22R2150
Department Approval - Single

Denied
🚫 Alex Doe
Single Approver for Dept
08/27/14 - 10:36 AM

For more information about how to use the PeopleSoft software system in our school district, as well as to find training opportunities and support, go online to www.sandi.net and follow this clicking navigation:

Staff —> Technical Support & Resources —> PeopleSoft

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