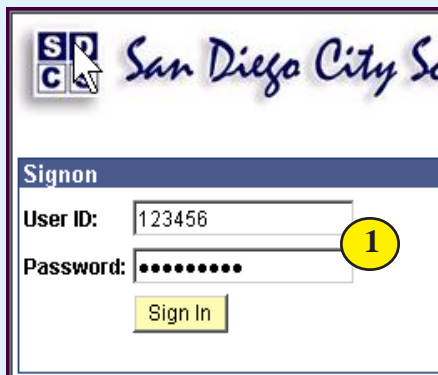


# eProcurement - How to Approve a Requisition

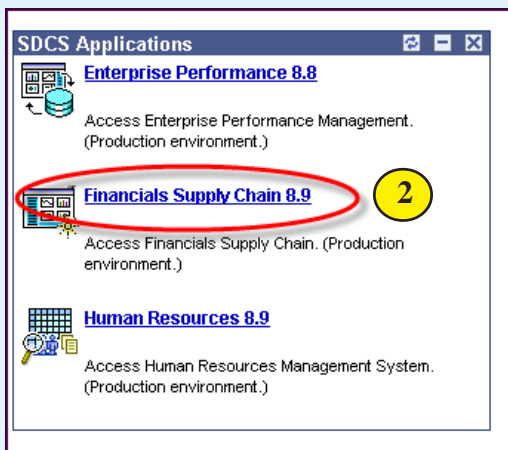
When someone in your department or school submits an ePro requisition, it is the Department Approver's job to review the requisition, ensure that the correct account is being used to pay for the items on it, and then approve the requisition. This Job Aid shows how to do this.

The Department Approver is usually the school principal, site administrator, program manager, director, or other type of department head.

Please note that it is against district policy for you, as the Department Approver, to have someone else log into the computer as you (using your password) to do these approvals. If anyone else has your password, you are at risk for identity theft and other unsavory things. Only the designated Department Approver should approve ePro requisitions.



1. To get to the computer screen you need, you must go online to <https://dwa.sandi.net>. Once there, you need to enter your district employee ID number and your personal password, then click the **Sign In** button.



2. On the next screen, click the link **Financials Supply Chain**.



3. On the next screen you see open up, click the link called **Worklist** in your upper-right corner.

# eProcurement - How to Approve a Requisition

Detail View Work List Filters: [Dropdown]

From	Date From	Work Item	Worked By	Activity	Link
Debra Sayble	09/25/2007	Approval Routing	Approval Workflow		<a href="#">Requisition</a> <a href="#">BUSINESS UNIT:SDUSD</a> <a href="#">REQ_ID:0000061927, 831</a>
Debra Sayble	09/25/2007	Approval Routing	Approval Workflow		<a href="#">Requisition</a> <a href="#">BUSINESS UNIT:SDUSD</a> <a href="#">REQ_ID:0000061928, 837</a>

4. When your Worklist opens up, you should see one or more submissions in a list. Each submission should have a blue hyperlink. Find the ePro requisition you want to approve, and click on its link.

## I. To Approve an Entire Requisition

**Requisition Approval**

Req Name: 0000061927  
 Total: 1500.00 USD  
 Requester: [Debra Sayble](#)  
 Entered on: 09/25/2007  
 Status: Pending

Business Unit: SDUSD  
 Requisition ID: 0000061927  
 Priority: Medium

Requester's Justification:  
 No justification entered by requester.

**Line Information**

Line	Item Description	Vendor Name	Qty	UOM	Price	Curr	Requester's Comments
1	COMPUTER IBM LAPTOP	AREY JONES-001	1.0000	EA	1,500.00	USD	

Select All / Deselect All  
 View Line Details

**Review/Edit Approvers**

**Requisition Approval**

Line 1: Pending  
 COMPUTER IBM LAPTOP  
 Department Approval - Single  
 Pending  
 Judith Brinas  
 Single Approver for Dept

**Buyer Approval**

Line 1: Awaiting Further Approvals  
 COMPUTER IBM LAPTOP  
 Buyer Approval  
 Not Routed  
 Mark Floyd  
 Buyer Approval

Enter Approver Comments

1. First you need to view the details of the requisition, before you should approve it. Click the **View Line Details** link.

**Requisition: 0000061927**

Requester: Debra Sayble Business Unit: SDUSD Requisition ID: 0000061927 Date: 9/25/2007

Comments:

Line	Description	Qty	Price	Curr	UOM	Total
1	COMPUTER IBM LAPTOP...	1	1500.000	USD	EA	1500.00

Line Comments  
 << For question please contact Julia Roberts at (619) 555-5555 at Wilshire Crest Elementary. Please contact us if you can't use this vendor. >>

Sched Line	Ship To	Attention	Due Date	Qty	Total
1	Supply Center	Debra Sayble	10/16/2007	1	1500.00

Line	Location	Req Qty	Amount	Pct	GL Unit	DeptID	Resource	Bud Ref	Account
1	0000A	1	1500	100	SDUSD	0003	00000	00	4491
Program	Class	Fund	Extended						
1000	1110	01000	0000						

2. A separate window opens up showing the details of the requisition. Look it over to ensure it is correct, and the right budget account is being used to pay for it. Then close this window completely by its X button in the upper right corner.

# eProcurement - How to Approve a Requisition

Line Information			
	Line	Item Description	Vendor Name
<input checked="" type="checkbox"/>	1	COMPUTER IBM LAPTOP	AREY JONES-001

Select All / Deselect All

View Line Details

Review/Edit Approvers

Requisition Approval

3. You are returned to the approval window. Click the **Approve** button.

✓ 0000061927 has been routed for further approval.

Review/Edit Approvers

Requisition Approval

Line 1: **Completed**  
COMPUTER IBM LAPTOP

Department Approval - Single

**Approved**  
✓ [Judith Brings](#)  
Single Approver for Dept  
11/1/2007 - 9:14 AM

Buyer Approval

Line 1: **Pending**  
COMPUTER IBM LAPTOP

Buyer Approval

**Pending**  
🕒 [Mark Floyd](#)  
Buyer Approval

[Return to Worklist](#)

4. You will then see a page that tells you that you have completed the approval for this requisition. If the requisition requires further approval by someone else, that information will be displayed as well. You don't have to click or do anything else. It will automatically be routed to the next person for processing.

At this point you can click the **Return to Worklist** link, located in the lower left corner, or you can log out of PeopleSoft.

## II. To Deny Part of a Requisition and Approve the Rest

If you want to deny one or more line items on a requisition, but you want to approve the rest of it, this section shows you how to do that.

To get started, you must follow the very first four steps on pages 1-2 of this Job Aid. Then do the following:

*(continued on the back)*

# eProcurement - How to Approve a Requisition

**Requisition Approval**

Req Name: Marina's Order  
 Total: 75.00 USD  
 Requester: Marina Falter Business Unit: SDUSD  
 Entered on: 11/01/2007 Requisition ID: 0000061930  
 Status: Pending Priority: Medium  
 Requester's Justification: No justification entered by requester.

Line	Item Description	Vendor Name	Qty	UOM	Price	Curr
1	DIESEL GREEN ULTRA LOW SULFER...	PINNACLE PETRO	50.0000	GL	1.40	USD
2	CHICKEN BREADED FROZ 30#CS...	STATE EDUCATIO	5.0000	CS	1.00	USD

**1** View Line Details

Approve Deny

**Requisition Approval**

**Line 1: Pending**  
 DIESEL GREEN ULTRA LOW SULFER  
 Department Approval - Single  
 Pending  
 Judith Brings  
 Single Approver for Dept

**Line 2: Pending**  
 CHICKEN BREADED FROZ 30#CS 3091093  
 Department Approval - Single  
 Pending  
 Judith Brings  
 Single Approver for Dept

Enter Approver Comments

1. First you should carefully review the details of the requisition, including which items it contains and which budget account(s) are being used to pay for the items.

To view the details of the items and the budget accounts, click the **View Line Details** button.

**2**

**Requisition: Marina's Order**

Requester: Marina Falter Business Unit: SDUSD Requisition ID: 0000061930 Date: 11/1/2007

Comments:

Line	Description	Qty	Price	Curr	UOM	Total			
1	DIESEL GREEN ULTRA LOW SULFER...	50	1.400	USD	GL	70.00			
<b>Sched Line</b>	<b>Ship To</b>	<b>Attention</b>	<b>Due Date</b>	<b>Qty</b>	<b>Total</b>				
1	Supply Center	Marina Falter		50	70.00				
<b>Line</b>	<b>Location</b>	<b>Req Qty</b>	<b>Amount</b>	<b>Pct</b>	<b>GL Unit</b>	<b>DeptID</b>	<b>Resource</b>	<b>Bud Ref</b>	<b>Account</b>
1	0003A	50	70	100	SDUSD	0003	00000	00	4605
<b>Program</b>	<b>Class</b>	<b>Fund</b>	<b>Extended</b>						
1000	1110	01000	0000						
Line	Description	Qty	Price	Curr	UOM	Total			
2	CHICKEN BREADED FROZ 30#CS 3091093...	5	1.000	USD	CS	5.00			
<b>Sched Line</b>	<b>Ship To</b>	<b>Attention</b>	<b>Due Date</b>	<b>Qty</b>	<b>Total</b>				
1	Supply Center	Marina Falter		5	5.00				
<b>Line</b>	<b>Location</b>	<b>Req Qty</b>	<b>Amount</b>	<b>Pct</b>	<b>GL Unit</b>	<b>DeptID</b>	<b>Resource</b>	<b>Bud Ref</b>	<b>Account</b>
1	0003A	5	5	100	SDUSD	0003	00000	00	9520
<b>Program</b>	<b>Class</b>	<b>Fund</b>	<b>Extended</b>						
1000	1110	01000	0000						

2. When you are finished reviewing the details, click the X button (in the upper right corner) to close the window. You will then be returned to the approval window.

# eProcurement - How to Approve a Requisition

3

**Enter Approver Comments**

We over-estimated how much fuel we need right now, so the diesel is being denied.

3. Enter comments that explain why you are denying the item(s). Type your comments into the **Enter Approver Comments** textbox located at the bottom of the screen. Comments are required anytime you deny any items on a requisition, as well as if you deny the entire requisition.

**Line Information**

	Line	Item Description	Vendor Name
<input checked="" type="checkbox"/>	1	DIESEL GREEN ULTRA LOW SULF...	PINNACLE PETRO
<input type="checkbox"/>	2	CHICKEN BREADED FROZ 30#/CS...	STATE EDUCATIO

Select All / Deselect All

4. Make sure that there is a checkmark in the **Select This Row** checkbox to the left of the item you want to deny. Then click the **Deny** button.

**Line Information**

	Line	Item Description	Vendor Name	Qty	UOM	Price	Curr
<input type="checkbox"/>	1	DIESEL GREEN ULTRA LOW SULF...	PINNACLE PETRO	50.0000	GL	1.40	USD
<input checked="" type="checkbox"/>	2	CHICKEN BREADED FROZ	STATE EDUCATIO	5.0000	CS	1.00	USD

Select All / Deselect All

**Review/Edit Approvers**

**Requisition Approval**

**Line 1: Denied**  
DIESEL GREEN ULTRA LOW SULFER  
[View Comments](#)

**Department Approval - Single**

**Denied**  
Judith Brinas  
Single Approver for Dept  
11/1/2007 - 1:22 PM

**Approval Comment History**  
Judith Brinas at 11/1/2007 - 1:22 PM  
We over-estimated how much fuel we need right now, so the diesel is being denied.

**Line 2: Pending**  
CHICKEN BREADED FROZ 30#/CS 3091093

**Department Approval - Single**

**Pending**  
Judith Brinas  
Single Approver for Dept

**Enter Approver Comments**

We over-estimated how much fuel we need right now, so the diesel is being denied.

5. The screen will show that the item you denied is now a different color (light blue) than the item you want to approve (gold). The screen also shows the denial in red in the Requisition Approval area.

First ensure that there is a checkmark in the checkbox to the left of the items you do want to approve (it should default that way anyhow).

Next, click the **Approve** button.

# eProcurement - How to Approve a Requisition

**Requisition Approval**

**Confirmation**

✓ Marina's Order has been approved.

**Review/Edit Approvers**

**Requisition Approval**

Line 1: Denied  
DIESEL GREEN ULTRA LOW SULFER [View Comments](#)

Department Approval - Single

Denied  
Judith Brings  
Single Approver for Dept  
11/1/2007 - 1:22 PM

Approval Comment History  
Judith Brings at 11/1/2007 - 1:22 PM  
We over-estimated how much fuel we need right now, so the diesel is being denied.

Line 2: Approved  
CHICKEN BREADED FROZ 30#CS 3091093 [View Comments](#)

Department Approval - Single

Approved  
Judith Brings  
Single Approver for Dept  
11/1/2007 - 1:27 PM

Approval Comment History  
Judith Brings at 11/1/2007 - 1:27 PM  
We over-estimated how much fuel we need right now, so the diesel is being denied.

[Return to Worklist](#) 6

6. Finally, the screen will show that the requisition has been approved, with the exception of the denied item(s). The comments you wrote are also displayed at the bottom.

From here you can navigate back to your Worklist by clicking the link in the lower-left corner. Or, you can log out of PeopleSoft Financials.

## III. To Deny an Entire Requisition

Sometime you might need to deny an entire requisition, so that it can be edited and re-submitted. This might occur if you want to change something about the order; add or delete items, or change the quantities; or if you just need to deny the requisition and not use it at all. This sections shows you how to deny an entire requisition.

**Requisition Approval**

Req Name: Marina's Order  
Total: 75.00 USD  
Requester: Marina Falter  
Entered on: 11/01/2007  
Status: Pending  
Requester's Justification: No justification entered by requester.

Business Unit: SDUSD  
Requisition ID: 0000061930  
Priority: Medium

**Line Information**

Line	Item Description	Vendor Name	Qty	UOM	Price	Cur.
1	DIESEL GREEN ULTRA LOW SULFER	PINNACLE PETRO	50.0000	GL	1.40	USD
2	CHICKEN BREADED FROZ 30#CS	STATE EDUCATIO	5.0000	CS	1.00	USD

Select All / Deselect All  
View Line Details  Approve  Deny

**Review/Edit Approvers**

**Requisition Approval**

Line 1: Pending  
DIESEL GREEN ULTRA LOW SULFER  
Department Approval - Single  
Pending  
Judith Brings  
Single Approver for Dept

Line 2: Pending  
CHICKEN BREADED FROZ 30#CS 3091093  
Department Approval - Single  
Pending  
Judith Brings  
Single Approver for Dept

**Enter Approver Comments**

Please change the quantity for the chicken from 5 to 10. Then re-budget-check, and re-submit. Thanks.

1. Follow the very first four steps on pages 1-2 of this Job Aid. Then, once the requisition is open on your screen, you must type in an explanation of why you are denying the requisition and what you want the originator to do with it, if anything. Type the explanation at the bottom, into the **Enter Approver Comments** textbox. Then, simply click the **Deny** button.

# eProcurement - How to Approve a Requisition

**Requisition Approval**

Confirmation

Marina's Order has been denied.

Review/Edit Approvers

**Requisition Approval**

Line 1: Denied  
DIESEL GREEN ULTRA LOW SULFER

Department Approval - Single

Denied  
Judith Brings  
Single Approver for Dept  
11/1/2007 - 1:58 PM

Approval Comment History  
Judith Brings at 11/1/2007 - 1:58 PM  
Please change the quantity for the chicken from 5 to 10. Then re-budget-check, and re-submit. Thanks.

Line 2: Denied  
CHICKEN BREADED FROZ 30#ACS 3091093

Department Approval - Single

Denied  
Judith Brings  
Single Approver for Dept  
11/1/2007 - 1:58 PM

Approval Comment History  
Judith Brings at 11/1/2007 - 1:58 PM  
Please change the quantity for the chicken from 5 to 10. Then re-budget-check, and re-submit. Thanks.

[Return to Worklist](#)

2. The screen shows that the entire requisition was denied. The comments you entered offering an explanation and instructions are also displayed.

From here you can navigate back to your Worklist by clicking the **Return to Worklist** link in the bottom-left corner. Or, you can log out of PeopleSoft Financials.

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PeopleSoft Financials 8.9 Upgrade Coming Fall 07  
View the latest news release!

PeopleSoft Training Classes for November 2007  
10/30/2007 - 10/31

Below is the list of dates for all PeopleSoft training classes being offered in November

NOTE: PeopleSoft classes are held at Roosevelt Middle School, located in Bungalow B3, and Fremont Training Center, located in Bungalow B3. (Maps with directions are available on the training website)

For more information, or to register for a class, please click the "training" link on the left side of this web page.

HR (Human Resources) Classes:

For more information about using eProcurement, or to find other ePro resources, go online to: [www.sandi.net/peoplesoft](http://www.sandi.net/peoplesoft).

