Optimize Puget Sound

Approving Requisitions

Online Help Videos and Printable Job Aids: https://pshelp.pugetsound.edu
Online Help Documents: https://soundnet.pugetsound.edu/optimizetraining

Course Overview

This course will guide you through approving and denying requisitions as part of managing your PeopleSoft worklist. In approving a requisition, you will learn how to review all the approvers and route requisitions to additional approvers. There are supplementary instructions on PeopleSoft Help and Optimize Training for submitting requisitions. You must be trained in a classroom or individual setting in order to have the correct eProcurement menu items available in your PeopleSoft menu.

Table of Contents

Approving a Requisition

In this lesson, you will learn how to approve a requisition.

Step	Action
1.	From the PeopleSoft homepage, click the **Worklist** link on the top right-hand side.
2.	Click on the requisition name such as **Requisition Office Supplies**.
3.	Click the **View Line Details** button to evaluate the requested item(s) and billing information.
4.	Click the **Close** button.
5.	Click the **Expand section** button on the Review/Edit Approvers tab in order to view all the approvers for the purchase or to add additional approvers.
6.	Click the **Approve** button once you are certain the purchase is reasonable.
7.	Congratulations! You just learned how to approve a requisition. For help, contact the Technology Service Desk at servicedesk@pugetsound.edu or 253.879.8585.

Denying a Requisition

In this lesson, you will learn how to deny a requisition.

Step	Action
1.	From the PeopleSoft homepage, click the **Worklist** link on the top right-hand side.
2.	Click the requisition name such as **Requisition Office Supplies**.
3.	Click the **View Line Details** button to consider the requested items and evaluate the billing information.
4.	Click the **Close** button.
5.	Click the **Deny** button.
6.	Click the **OK** button.
7.	Enter the desired information into the **Enter Approver Comments** field. Enter "**I do not approve this requisition.**" **A comment is required when denying a requisition.**
8.	Click the **Deny** button to see the list of approvers that the requisition was routed to.
9.	Click the **Return to Worklist** link.
10.	Congratulations! You just learned how to deny a requisition. For help, contact the Technology Service Desk at servicedesk@pugetsound.edu or 253.879.8585.

Appendix A: Crosswalk: How do I code my expenses now?

In this lesson, you will learn how to look up the account codes that you were accustomed to using and find out the new account codes to be used in PeopleSoft.

Step	Action
1.	Click the **Main Menu** button.
2.	Click the **Puget Sound Financials** menu.
3.	Click the **How do I code my expenses now?** menu.
4.	Click in the **Banner Index** field.
5.	Enter the desired information into any field. These instructions will walk you through entering data into several different fields. First use the **Banner Index** field. Enter "**004105**". Click the **Search** button. **Use SpeedCharts now** instead of Index Codes.
6.	Click **Return to Search** and then the **Clear** button to begin a new search.
7.	Click in the **Banner Fund** field. Enter the desired information into the **Banner Fund** field. Enter "**100000**". Click the **Search** button. You will see that the Banner Fund is associated with multiple PS Department codes, and you can click on any hyperlink to select a row. In this example, click the **4013** link. This is the **new PS Fund code** in this instance.
8.	Click the **Return to Search** button. Click the **Clear** button to start a new search.
9.	Click in the **Banner Orgn** field. Enter the desired information into the **Banner Orgn** field. Enter "**4105**". Click the **Search** button. Click the **4105** link. This is the **new PS Department code**.
10.	Click the **Next in List** button to cycle through the search results.
11.	Click the **Return to Search** button. Click the **Clear** button to find other new codes.
12.	Click in the **Banner Acct** field. Enter the desired information into the **Banner Acct** field. Enter "**70135**". Click the **Search** button. Click the **70135** link. This is the **new PeopleSoft account code**.
13.	Click the **Return to Search** button. Click the **Clear** button to search again.
14.	Click the **PS Account Description** list to utilize other search options. Click the **contains** list item. Enter the desired information into the **PS Account Description** field. Enter "**supplies**". Click the **Search** button. Click the **Office Supplies-Expense** link. Here is the **PeopleSoft account code**.
15.	Click the **Return to Search** button. Click the **Clear** button.
16.	You just learned how to look up PeopleSoft billing codes.

Appendix B: Supported PeopleSoft Browsers

Desktop Computers

- Firefox 2.x, 3.x, 4+
- Internet Explorer 7, 8, 9
- Safari 3.2, 4.x, 5.x
- Chrome 1+

Mobile (available in late 2013)

- BlackBerry Browser 4
- WebKit-based mobile browsers (iPhone Safari, Android Chrome, Nokia S60)
- Access NetFront 3
- OpenWave (UP Browser) 7
- Opera Mini 8
- Pocket Internet Explorer for Windows Mobile 5, 6
- Safari (iOS) 4.3, 5+
- Other Basic XHTML mobile browsers

Note: These are the supported PeopleSoft browsers provided by Oracle as of July 2012.

Appendix C: Where to Get Help

PeopleSoft Help	PeopleSoft Help, adapted from Oracle's User Productivity Kit (UPK), provides animated help videos developed by the project team to guide you through each step. You can locate these videos from the Cascade Menu. In the description field for PeopleSoft Financials, there is a Learn More link to the right-hand side. The full URL is pshelp.pugetsound.edu.
TS Service Desk	Please call or email the Technology Service Desk at 253.879.8585 or servicedesk@pugetsound.edu for any system questions. Your query will be answered or routed to the appropriate party.

Optimize Puget Sound

Purchasing Course Evaluation

Thank you for attending PeopleSoft's Purchasing training. Please take a few minutes to answer the questions below. Your feedback will help us improve upcoming classes and online offerings.

1. How would you rate the course's content (handouts, demonstration, hands-on practice, etc.) on a scale of 1-5 with 5 being very beneficial? (Circle one) 1 2 3 4 5

2. What aspects of the training did you find most helpful?

   ____

3. Were any topics not covered in the training that you would suggest including?

   ____

4. Would you recommend this course to colleagues and why? (Circle one) YES NO

   ____