

# Instructional Guide for Requisition Workflow+ Approvers

Instructions for Cost Center Approvers

Office of Contracts & Procurement

Fiscal Year 2017

*+Workflow is an electronic approval routing process that allows for multiple budgetary level approvers to communicate, verify and store documents.*



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# APPROVE REQUISITIONS USING EMAIL NOTIFICATION

Approval is Requested for Requisition ID "0000001083"  
Business Unit "UT System Administration"

**fbradley@utsystem.edu**

To: Gary, James

Thursday, December 08, 2016 9:45 AM

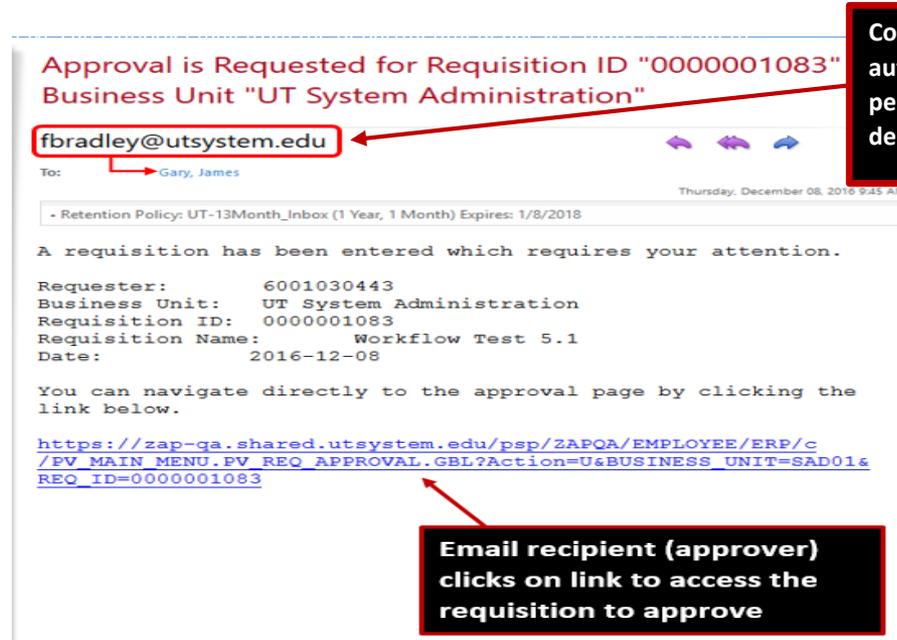
- Retention Policy: UT-13Month\_Inbox (1 Year, 1 Month) Expires: 1/8/2018

A requisition has been entered which requires your attention.

Requester: 6001030443  
Business Unit: UT System Administration  
Requisition ID: 0000001083  
Requisition Name: Workflow Test 5.1  
Date: 2016-12-08

You can navigate directly to the approval page by clicking the link below.

[https://zap-qa.shared.utsystem.edu/psp/ZAPOA/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_APPROVAL.GBL?Action=U&BUSINESS\\_UNIT=SAD01&REQ\\_ID=0000001083](https://zap-qa.shared.utsystem.edu/psp/ZAPOA/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=SAD01&REQ_ID=0000001083)



Cost Center Approver receives an auto-generated email in UT System personal Outlook inbox from the departmental Requester.

Email recipient (approver) clicks on link to access the requisition to approve

Approver will be directed to the Log-in screen in PeopleSoft. Follow the instructions on the next page.



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# LOGGING INTO PEOPLESOFT

## Step 1



*UT Share* is a shared multi-institutional application. In order to authenticate you, we need to know which of the *UT Share* institutions you would like to login with.

Please select your home institution.

Use a suggested selection:



The University of Texas System Ad...

Or select your institution from the list below

Please select your institution

- https://idp.utpa.edu/idp/shibboleth
- https://idp-test.uta.edu/idp/shibboleth
- https://idptest.uttyler.edu/idp/shibboleth
- https://shib3.utep.edu/idp/shibboleth
- The University of Texas at Arlington
- The University of Texas at Brownsville
- The University of Texas at Dallas
- The University of Texas at El Paso
- The University of Texas at San Antonio
- The University of Texas at Tyler
- The University of Texas of the Permian Basin
- The University of Texas Rio Grande Valley
- The University of Texas System Administration
- The University of Texas-Pan American

Continue Help

Select "UT System Administration" from dropdown box, then click "Continue"

## Step 2



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SNAC Username

Password

Login

You are accessing The University of Texas System Administration network.

- Unauthorized use is prohibited.
- Usage may be subject to testing and monitoring.
- Abuse is subject to criminal prosecution.
- No expectation of privacy except as otherwise provided by applicable privacy laws.

Learn more online security from the platform of your choice.



Enter your UT System Administration SNAC and password. If you need assistance, please call the Help Desk at 512-499-4357 or email [help@utsystem.edu](mailto:help@utsystem.edu).

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[Privacy](#) | [Accessibility](#)

Enter your UT System Administration SNAC and password, then click "Login"

**You will be routed to the 2FA (two-factor authentication)**



# LOGGING INTO PEOPLESOFT (CONT.)

The 2FA\* will notify you according to the authentication method you have chosen.

## Step 3

UT System Administration

# 2FA

two-factor authentication

Choose an authentication method

- Duo Push ✓ Used automatically Send Me a Push
- Call Me Call Me
- Passcode Enter a Passcode

[What is this?](#) [Add a new device](#) [My Settings & Devices](#) [Need help?](#)

Powered by Duo Security

Pushed a login request to your device... Cancel

***\*UT System Administration utilizes the Duo-factor login procedure for added security. To set this up, please follow the instructions found at the link below:***

<https://community.utsystem.edu/sites/infosec/2fa/SitePages/GettingStarted.aspx>

***Once you acknowledge the notification, You will be routed to the Requisition requiring your approval.***



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# REQUISITION APPROVAL SCREEN

Requisition Review

Business Unit: SAD01  
Requisition ID: 000001083  
Requisition Name: Workflow Test 5.1  
Requester: Felicia S Bradley  
Entered on: 12/08/2016  
Status: Pending Total Amount:  
Priority: Medium  
Budget Status: Valid  
Requester's Justification: No justification entered by requester.

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

- Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price
1 line 1		DELL MARKE-001	1 000	EA	USD

Select All / Deselect All  
View Line Details

Click on the **Select All/Deselect All** button

Once all lines are selected, click on the **Approve** button

Approve Deny Hold

Return to Worklist



Requisition Approval

Confirmation

✓ Approve by Email has been approved.

Review/Edit Approvers

Cost Center Approval

▼ Approve by Email: **Approved**

Cost Center Approval

Approved  
James B Gary  
Cost Center Approval  
12/08/16 - 1:49 PM

Return to Worklist

## Once the Requisition is Approved, one of the following will happen:

- Approved Requisitions **under** \$15,000.00 will **auto-create** and **auto-approve** a Purchase Order. This signed and approved PO will route to the Requester as a pdf attached in an email. The Requester then forwards the PO pdf to the Vendor.
- Approved Requisitions **over** \$15,000.00 will **auto-create** a Purchase Order which is routed to a UT System Buyer who will approve the PO and dispatch to the Vendor.
- Approved Requisitions (regardless of Dollar amount) that contain **Commodity Codes** for **Controlled items** (i.e., Computers, Software, Furniture, etc.) will route to a pre-designated Commodity Code Approver for approval. Upon that approval, the PO will **auto-create** and route according to set \$\$ thresholds.



# DENYING A REQUISITION

## APPROVERS CAN DENY AUTHORIZATION OF A REQUISITION

Requisition Review

Business Unit: SAD01  
Requisition ID: 000001083  
Requisition Name: Workflow Test 5.1  
Requester: Felicia S Bradley  
Entered on: 12/08/2016  
Status: Pending  
Priority: Medium  
Budget Status: Valid  
Total Amount:  
Requester's Justification: No justification entered by requester.

Header Comments View printable version

Line	Item Description	Vendor Name	Price	Unit of Measure	Cost
1	1 line line	DELL MARKE-001		USD	

Select All / Deselect All View Line Details

Review/Edit Approvers

Enter Approver Comments

Denying this requisition for test purposes

Approve Deny Hold

Return to Worklist

Click on the **Select All/Deselect All** button

Add Comments regarding **why** the requisition is denied

Once all lines are selected, click on the **Deny** button

Requisition Approval

Confirmation

000001083 has been denied.

After the requisition is approved, a confirmation page will appear

Creator will receive an email that the document has been denied.

Review/Edit Approvers

Cost Center Approval

Requisition 000001083 : Denied View/Hide Comments

Cost Center Approval

Denied

James B Gary  
Cost Center Approval  
12/08/16 - 1:49 PM

Comments

Return to Worklist



# APPROVE REQUISITIONS WITH *MANAGE REQUISITION APPROVALS*

## Step 1

The screenshot shows the Oracle eProcurement Main Menu. A search bar at the top contains the text "Navigate to Manage Requisition Approvals". The menu is organized into sections: "Top Menu", "The menu started.", "Highlight", "Recently the Favor", "Breadcrumb navigation the conte", and "Menu Se". The "eProcurement" folder is highlighted in green. A sub-menu is open for "eProcurement", showing "Buyer Center" and "Manage Requisition Approvals" (highlighted in yellow). A green arrow points from the "eProcurement" folder to the "Manage Requisition Approvals" option. The background shows a blurred view of the Oracle application interface.



# APPROVE REQUISITIONS WITH *MANAGE REQUISITION APPROVALS (CONT.)*

## Step 2

**Manage Requisition Approvals**

**Search Requisitions**

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID:  Requisition Name:

Business Unit:  Status: Pending

Date From: 12/09/2014 Date To: 12/09/2015

Requester:  Entered by:

[Show Advanced Search](#)

**Requisitions**

To approve or deny one or more pending requisitions, select the appropriate action from the dropdown and click submit. To view the complete details of a requisition, click the Requisition ID link.

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
Pending	0000016565	Approval - Grant	UTSA1	12/09/2015	Yvette Medina	Yvette Medina	407.50 USD

Mark All:  Approve  Deny  Hold

[Create New Requisition](#) [Manage Requisitions](#)

**Set the status to Pending and click on search.**

**All requisitions pending approval will appear.**

## Step 3

**Manage Requisition Approvals**

**Search Requisitions**

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID:  Requisition Name:

Business Unit:  Status: Pending

Date From: 12/09/2014 Date To: 12/09/2015

Requester:  Entered by:

[Show Advanced Search](#)

**Requisitions**

To approve or deny one or more pending requisitions, select the appropriate action from the dropdown and click submit. To view the complete details of a requisition, click the Requisition ID link.

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
Pending	0000016565	Approval - Grant	UTSA1	12/09/2015	Yvette Medina	Yvette Medina	407.50 USD

Mark All:  Approve  Deny  Hold

[Create New Requisition](#) [Manage Requisitions](#)

**To approve the requisition, Approver will need to use the Action/Status drop down menu and select Approve.**

**Click on Submit button to process the request.**



# APPROVE REQUISITIONS WITH *MANAGE REQUISITION APPROVALS* (CONT.)

## Step 4

Approve Requisitions

**Submit Confirmation**

Are you sure you want to take the following action?

Approve

Summary: 1 requisitions Total: 407.50 USD

**Details**

Requisition ID	Requisition Name	BU	Date	Requester	Entered By	Total	Curr
0000016565	Approval - Grant 1000000444	UTSA1	12/09/2015	Yvette Medina	Yvette Medina	407.50	USD

**Comments (Optional)**

Add comment if desired

**Annotations:**

- A confirmation page will appear, approvers can add comments or notes to the creator (requisition creator).
- To completed the process, click on the **OK** button to final approve the requisition.

## Step 5

Manage Requisition Approvals

**Search Requisitions**

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID:  Requisition Name:

Business Unit:  \*Status: Approved

Date From: 12/09/2014 Date To: 12/09/2015

Requester:  Entered by:

[Show Advanced Search](#)

**Requisitions**

To approve or deny one or more pending requisitions, select the appropriate action from the dropdown and click submit. To view the complete details of a requisition, click the Requisition ID link.

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
<input checked="" type="checkbox"/> Approved	<a href="#">0000016565</a>	Approval - Grant 1000000444	UTSA1	12/09/2015	Yvette Medina	Yvette Medina	407.50 USD

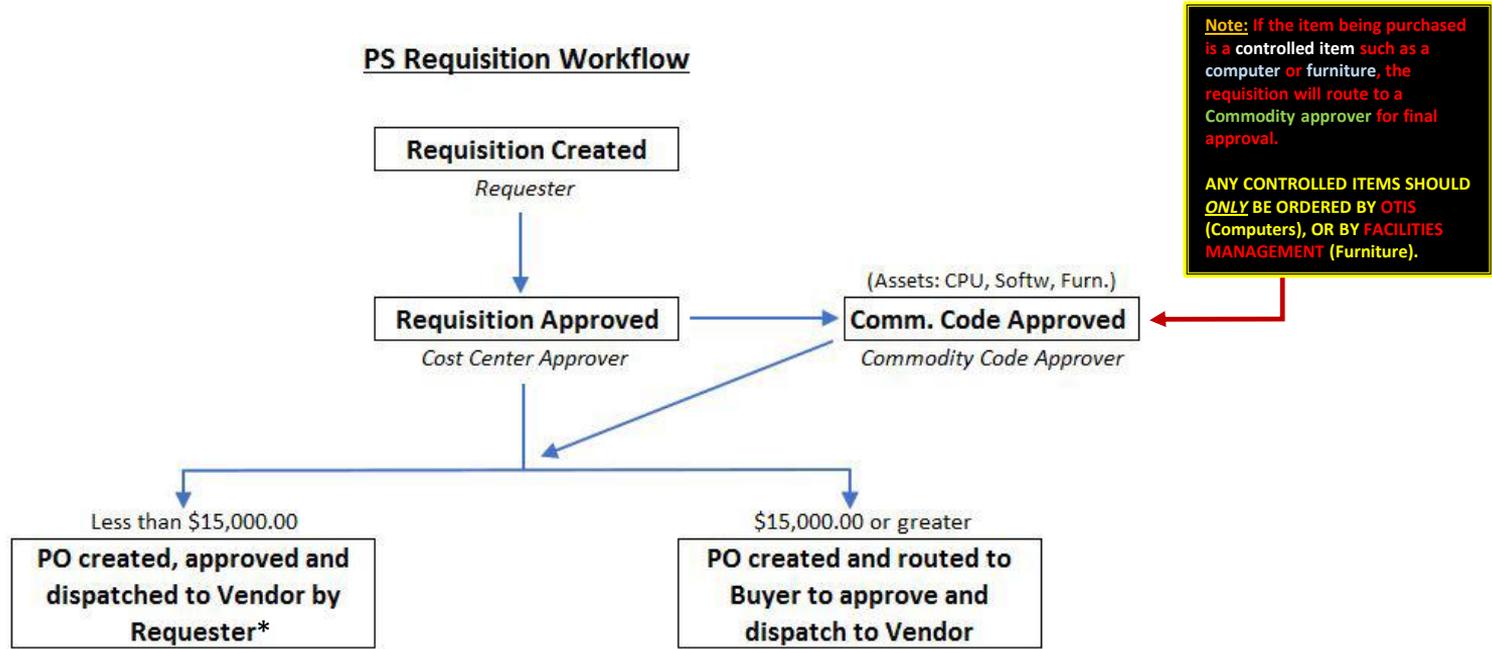
[Create New Requisition](#) [Manage Requisitions](#)

**Annotations:**

- Once the submit button is selected, the status of the requisition will change from **Pending** to **Approved**.



# REQUISITION TO PURCHASE ORDER WORKFLOW<sup>+</sup>



\*Requester receives an email with the approved and signed Purchase Order attached as a .pdf file. The Requester forwards this .pdf to the Vendor for processing.

<sup>+</sup>Workflow is an electronic approval routing process that allows for multiple budgetary level approvers to communicate, verify and store documents.



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# ADDITIONAL RESOURCES

## **Purchasing Contacts:**

**Christopher Palacios** (512) 579-5143

**Kyle Hayes** (512) 322-3745

## **Visit the Contracts and Procurement website for further information:**

- [Staff directory](#)
- [Procedures](#)
- [Forms](#)
- [Guides](#)
- [Important Links](#)
- [Supplier Resources](#)

<https://www.utsystem.edu/offices/contracts-and-procurement>

