



## Requisition Entry With Workflow

User ID:  (User ID is your 7-digit PeopleSoft ID Number)

Password:

[Request A New Password](#)

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Enter your User ID and password.

Click the  button or simply press Enter and the following page will appear.

UHS Finance Test DB

Home | Add to Favorites | Sign out

Personalize [Content](#) | [Layout](#) [Help](#)

**Menu**

Search:

- ▶ My Favorites
- ▶ Business Processes
- ▶ Custom Reports
- ▶ Computer Operations
- ▶ Vendors
- ▶ Purchasing
- ▶ Accounts Payable
- ▶ Asset Management
- ▶ Commitment Control
- ▶ General Ledger
- ▶ Set Up Financials/Supply Chain
- ▶ Application Diagnostics
- ▶ Tree Manager
- ▶ Reporting Tools
- ▶ PeopleTools
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)

**Requisition worklist**

No Requisitions

powered by PeopleSoft

If you do not have the **Requisition Worklist** Table click on [Content](#) | located just above the menu and the following page will appear.

## Personalize Content

**Choose Pagelets:** Simply check the items that you want to appear on your homepage.  
Remember to click "Save" when done.

**Arrange Pagelets:** Go to [Personalize Layout](#)

**Welcome Message:**

### PeopleSoft Applications

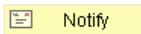
- [Menu](#)  
 [My Reports](#)

### Financials

- [Requisition worklist](#)



[Return to Home](#)

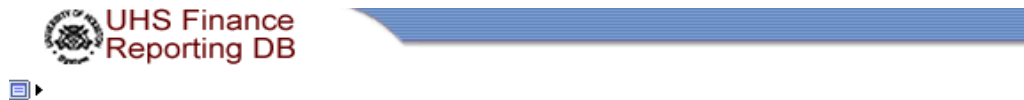


Put a check mark in the box next to requisition worklist and then click save. Now every time you log on to PeopleSoft the requisition worklist will appear.

Select the following in the menu field:

Purchasing – Requisitions – Maintain Requisitions.

The following page will appear.



## Requisitions

Use the following search to look for an existing Requisition.

**Find an Existing Value** **Add a New Value**

**Business Unit:** =

**Requisition ID:** begins with

**Requisition Status:** =

**Origin:** begins with

**Requester:** begins with

Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Click on the “Add a New Value” tab, and the following page will appear.

UHS Finance Reporting DB

Find an Existing Value Add a New Value


Business Unit: 00765

Requisition ID: NEXT

Add

Find an Existing Value | Add a New Value

**Business Unit:** The system will default to 00765. If it does not, please type in 00765.

Since you are entering a requisition for the first time you need to click the  button and the following page will appear.

UHS Finance Reporting DB

Home Add to Favorites Sign out

New Window | Help | Customize Page | http

Form Schedule Approval Documents

Unit: 00765 Req ID: NEXT \*Req Date: 05/01/2008 Origin: 000

\*Requester: Hold From Further Processing

Status: Open Budget Status: Not Chkd Accounting Date: 05/01/2008 \*Currency: USD Dollar

Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1			0.0000			0.00000		Active


Total Amt: 0.00 USD Total Base Amt: 0.00 USD

\*Go to: Header Defaults Header Comments Item Search Item Detail Line Defaults Line Details

Copy From Catalog Line Comments Sourcing Controls ...More...

Save Notify Refresh Add Update/Display

Form | Schedule | Approval | Documents

To enter a requester, click on the magnifying glass located to the right of the requester box **\*Requester:**   and the following page will appear.

## Look Up Requester

Requester:

Description:

[Basic Lookup](#)

### Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#) First  1-100 of 300  [Last](#)

Requester	Description
<a href="#">0000844</a>	<a href="#">\$TERM Nail,Shannon D-UHCL</a>
<a href="#">0002099</a>	<a href="#">Barrow,Kimberly Anne</a>
<a href="#">0002606</a>	<a href="#">\$TERM, Erol,Nihan - UHCL</a>
<a href="#">0003670</a>	<a href="#">Wirt,Candace Wehe</a>
<a href="#">0004807</a>	<a href="#">Edwards, Kim Elaine</a>
<a href="#">0004914</a>	<a href="#">Benjamin,Betty Jean</a>
<a href="#">0005232</a>	<a href="#">\$TERMSlough,Brenda H-UHCL</a>

In the blank box after Description, type in the last name of the requester and click on  . The name of the person you typed in should appear in the **Search Results** . There may be more than one person with the same last name as your requester so you may need to scroll down until you find the right person, then click on the name and the following page will appear.

UHS Finance Reporting DB

Home | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)

Form | [Schedule](#) | [Approval](#) | [Documents](#)

Unit: 00765 Req ID: NEXT \*Req Date: 05/01/2008 Origin:

\*Requester: MIMS,ERIC DELEGATED PURCHASER  Hold From Further Processing

Status: Open Budget Status: Not Ch'kd Accounting Date: 05/01/2008 \*Currency: USD Dollar

Line	Item ID	Description	Req Qty	*UOM	Category	Price	Ship To	Status
<input checked="" type="checkbox"/>	1		0.0000			0.00000	VUC114	Active

Total Amt: 0.00 USD Total Base Amt: 0.00 USD

\*Go to: [Header Defaults](#) | [Header Comments](#) | [Item Search](#) | [Item Detail](#) | [Line Defaults](#) | [Line Details](#) | [...More...](#)

[Copy From](#) | Catalog | [Line Comments](#) | Sourcing Controls

Form | [Schedule](#) | [Approval](#) | [Documents](#)

Next you will need to enter the Origin. Click on the drop down box next to Origin:  and select ONL.

Next go to [Header Defaults](#) . Click this link at the bottom left corner of the page right after **\*Go to:** . The following page appears.

**Header Defaults**

Unit: 00765 Req ID: NEXT

**Default Options**

Default  Override

**Item Defaults**

Vendor:  Location:

[Vendor Lookup](#)

Buyer:

Ship To: VUC114 RECEIVING -CENTER BLDG

Due Date:  Category:  UOM:

Distribute by: Amt SpeedChart:

**Distributions**

Details [Asset Information](#)

Dist	Percent	GL Unit	Account	Fund Code	DeptID	Program	Bud Ref	Budget Date	Project	Entry Event
1	<input type="text"/>	00765	<input type="text"/>	<input type="text"/>	V0016	<input type="text"/>	<input type="text"/>	05/01/2008	<input type="text"/>	<input type="text"/>

[One Time Address](#)

OK Cancel Refresh

Under **Default Options**  Default  Override make sure Override is checked.

**Item Defaults**

Vendor:  Location:

[Vendor Lookup](#)

Buyer:

Ship To: H5018 PUBLICATIONS

Due Date:  Category:  UOM:

Fill in the Vendor, Buyer and Due Date boxes. Also be sure that the Ship To is correct.

To enter the vendor, click on the icon next to the vendor box. The following page will appear.

## Look Up Vendor

SetID: 00797

Vendor ID:

Short Vendor Name:

[Basic Lookup](#)

Type in the Vendor's name in

Short Vendor Name:

box and then click the

button, the following will appear.

### Search Results

[View All](#)

First  1-29 of 29  Last


Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
0000036185	WESTERN DA-001	WESTERN DATA SYSTEMS	(blank)	(blank)	(blank)
0000050737	WESTERNACA-001	WESTERN ACADEMIC PRESS INC	(blank)	(blank)	(blank)
0000043772	WESTERNANA-001	WESTERN ANALYTICAL PRODUCTS INC	(blank)	(blank)	(blank)
0000005769	WESTERNASS-001	WESTERN ASSN OF COLLEGE & UNIV BUSINESS OFFICERS	(blank)	(blank)	16803809520
0000011785	WESTERNASS-002	WESTERN ASSN OF UNIVERSITY PUBLICATIONS MANAGERS	(blank)	(blank)	19309047215
0000046705	WESTERNASS-004	WESTERN ASSN OF PRELAW ADVISORS	(blank)	(blank)	(blank)
0000042181	WESTERNATH-001	WESTERN ATHLETIC SUPPLY	(blank)	(blank)	(blank)
0000009095	WESTERNBUS-001	WESTERN BUSINESS SYSTEMS	(blank)	(blank)	17601862273
0000012258	WESTERNCOS-001	WESTERN COSTUME CO	(blank)	(blank)	19523962793
0000012364	WESTERNGRA-001	WESTERN GRAPHTEC INC	(blank)	(blank)	19533303491
0000003417	WESTERNILL-001	WESTERN ILLINOIS UNIV	(blank)	(blank)	13709104585
0000011406	WESTERNINT-001	WESTERN INTERSTATE COMM FOR HIGHER ED	(blank)	(blank)	18460089453
0000005489	WESTERNKEN-001	WESTERN KENTUCKY UNIV	(blank)	(blank)	16160556284
0000043632	WESTERNLEI-001	WESTERN LEISURE INC	(blank)	(blank)	(blank)
0000006279	WESTERNLIT-001	WESTERN LITHOGRAPH	(blank)	(blank)	17413587050

If there is more than one vendor with a like name of the vendor you are looking for, the screen will look like the above. Scroll until you find the vendor you are looking for and then click on their name. You will return to the Header Defaults page and the vendor box will be filled in.

You are now ready to enter the Buyer. The two options for UHV are:

- Brenda Zellmer - 0807122
- Mary Lou Rendon - 0813172

Enter the ID number for one of the buyers in the Buyer field.

You are now ready to enter the DUE date. You can either enter the due date or click on the  icon next to the Due Date Box.

Once you enter the Due Date you are now ready to enter your cost center.

**NOTE:** If you are entering a multi-line requisition and all lines are going to be charged to the same account number and cost center you only need to enter the cost center one time on this screen. If you are going to charge any line to a different cost center **DO NOT** enter it here. It can be enter by line later in the instructions. By entering the cost center in Header Defaults, the system will automatically default each line to the cost center that is entered.

Distribute by:  SpeedChart:

**Distributions**

Details [Asset Information](#)

Dist	Percent	GL Unit	Account	Fund Code	DeptID	Program	Bud Ref	Budget Date	Project	Entry Event
1	100.0000	00765	53914	2064	V0016	F0347	BP2008	05/01/2008	NA	

[One Time Address](#)

OK Cancel Refresh

Be sure that **Distribute by:**  says Amt. Enter your cost center and click OK and you will return to the Form page of the requisition.

UHS Finance Reporting DB

Home Add to Favorites Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

Form [Schedule](#) [Approval](#) [Documents](#)

Unit: 00765 Req ID: NEXT \*Req Date: 05/01/2008 Origin: ONL

\*Requester: MIMSERIC DELEGATED PURCHASER  Hold From Further Processing

Status: Open Budget Status: Not Chkd Accounting Date: 05/01/2008 \*Currency: USD Dollar

Line	Item ID	Description	Req Qty	*UOM	Category	Price	Ship To	Status
<input checked="" type="checkbox"/> 1			0.0000			0.00000	VUC114	Active

Total Amt: 0.00 USD Total Base Amt: 0.00 USD

\*Go to: [Header Defaults](#) [Header Comments](#) [Item Search](#) [Item Detail](#) [Line Defaults](#) [Line Details](#)

[Copy From](#) Catalog [Line Comments](#) Sourcing Controls

Save Notify Refresh Add Update/Display

Form | [Schedule](#) | [Approval](#) | [Documents](#)

You are now ready to enter the Line Information: Description – Req Qty – UOM (Unit of Measure) – Category and Price. Leave Item ID blank, we do not use this field.

Description: Enter the item description and include the part/item number. Entry should be in ALL CAPS and there is a maximum of 250 characters allowed in this field. Option: click on to see full display of description. Additional description

can be added by clicking on [Line Comments](#) link at the bottom of the screen. The following page will appear:

### Line Comments

Unit: 00765    Req ID: NEXT    Line: 1

Find | View All    First 1 of 1 Last

Active Only    \*Sort Methd: Comment Time Sta    \*Sort Seq: Ascending

Comments:  
ADDITIONAL DESCRIPTION INFORMATION ENTERED HERE.

Send to Vendor     Shown at Receipt     Shown at Voucher


Associated Document  
File Name:    File Extension:

[Standard Comments](#)    [GoTo Source](#)    [Fetch Item Specs](#)

OK    Cancel    Refresh

When entering additional comments on this page please ensure that the  **Send to Vendor** checkbox is marked, this allows the comments to print on the Purchase Request document.

Quantity: Enter the quantity requested.

Unit of Measure: Click  for UOM. Click the [Customize | Find | View All | !\[\]\(4679d51b5fe73300b80b25131a7b4f6f\_img.jpg\)](#) View All link to see all units of measure on one page. Scroll down and click proper checkbox for the unit of measure you would like to use. Most common unit of measure is Each.

Category: Click  for Category. The following screen will appear:


### Look Up Category

SetID: 00797

Category: begins with

Description: begins with

Look Up    Clear    Cancel    [Basic Lookup](#)

Change the drop down box next to Description to say “Contains” and then type a brief description of the item you are purchasing in the box. Click  and the following page will appear:

## Look Up Category

SetID: 00797

Category:

Description:  COMPUTER

   [Basic Lookup](#)


## Search Results

View All First  1-73 of 73  Last

Category	Description
<a href="#">60008</a>	<a href="#">ADDRESSING MACHINES (COMPUTER</a>
<a href="#">20710</a>	<a href="#">BATTERIES, COMPUTER AND PERIPH</a>
<a href="#">20714</a>	<a href="#">BATTERY CHARGERS, COMPUTER AND</a>
<a href="#">20723</a>	<a href="#">CARTS, COMPUTER</a>
<a href="#">98430</a>	<a href="#">COMPUTER ACCESSORIES (NOT OTHE</a>
<a href="#">20700</a>	<a href="#">COMPUTER ACCESSORIES AND SUPPL</a>
<a href="#">20931</a>	<a href="#">COMPUTER AIDED DESIGN</a>
<a href="#">20830</a>	<a href="#">COMPUTER AIDED DESIGN AND VECT</a>
<a href="#">92018</a>	<a href="#">COMPUTER AIDED DESIGN SERVICES</a>
<a href="#">92019</a>	<a href="#">COMPUTER DIGITIZING SERVICES</a>
<a href="#">20400</a>	<a href="#">COMPUTER HARDWARE AND PERIPHER</a>
<a href="#">20600</a>	<a href="#">COMPUTER HARDWARE AND PERIPHER</a>
<a href="#">96728</a>	<a href="#">COMPUTER HARDWARE AND SOFTWARE</a>
<a href="#">91828</a>	<a href="#">COMPUTER HARDWARE CONSULTING</a>
<a href="#">20732</a>	<a href="#">COMPUTER INSTRUCTIONAL AIDS AN</a>



Click on the most appropriate link in Search Results for your item.


Price: Enter individual unit price for each line item.

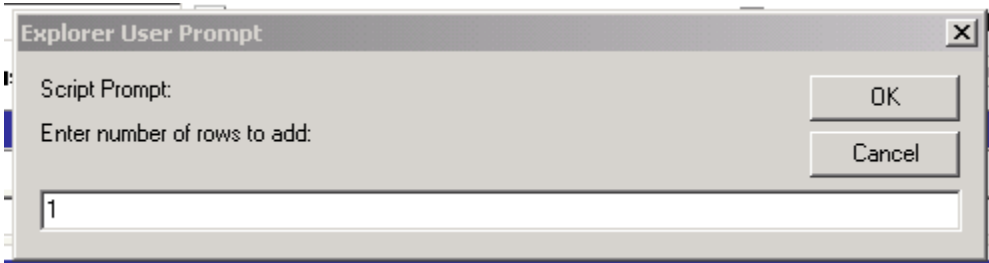
Ship To: A default ship to address of VUC115F should be shown, click the  to change if necessary.

## MULTI-LINE REQUISITION -

If you are entering a multi-line requisition after you have entered line 1, scroll

over until you see  

To add a line click on the  icon and you will get the following message



Enter the number of lines you want to add and click OK and the following page will appear.

UHS Finance Reporting DB

Home Add to Favorites Sign Out

New Window Help Customize Page

Form Schedule Approval Documents

Unit: 00765 Req ID: NEXT \*Req Date: 05/01/2008 Origin: ONL

\*Requester: MIMS,ERIC DELEGATED PURCHASER Hold From Further Processing

Status: Open Budget Status: Not Chkd Accounting Date: 05/01/2008 \*Currency: USD Dollar

Line	Item ID	Description	Req Qty	*UOM	Category	Price	Ship To	Status
<input type="checkbox"/>	1	DELL COMPUTER,	0.0000	EA	20400	1,400.000	VUC115	Active
<input checked="" type="checkbox"/>	2		0.0000			0.00000	VUC114	Active

Total Amt: 0.00 USD Total Base Amt: 0.00 USD

\*Go to: Header Defaults Header Comments Item Search Item Detail Line Defaults Line Details

Copy From Catalog Line Comments Sourcing Controls ...More...

Save Notify Refresh Add Update/Display

Form | Schedule | Approval | Documents

Enter the Description – Req Qty - UOM – Category and Price the same way you did for line 1 for each line that you are adding. If all additional lines are going to be charged to the same cost center as item 1 you DO NOT need to add the additional cost centers because the system will default the cost center from what you entered in Header Defaults.

If you are going to charge the full amount of any of the additional lines you added to a DIFFERENT cost center, do the following.

Click the box next to the item number that you want to change the cost center on. This will put a check in that box. Click on Schedule and once the schedule page appears, click on distribution. You will notice that the cost center defaulted to what you entered for item number 1. You can just delete what is in each field of the cost center (a field at a time) and enter in the correct cost center you want to use. Once you have done that, click on Ok and then on Save. You should be

back at the Schedule page. Click on Form and this will return you to the Requisition Form page. You are now ready to enter comments.

Click on [Header Comments](#) and the following page will appear.

**Header Comments**

Unit: 00765    Req ID: 0000002922

Comments    Find | View All    First 1 of 1 Last

Active Only    \*Sort Method: Comment Time Sta    \*Sort Seq: Ascending

Comments:  
PUT ANY INFORMATION THAT THE VENDOR MAY NEED AS WELL AS QUOTE INFORMATION AND ANY STANDARD COMMENTS.

Send to Vendor     Shown at Receipt     Shown at Voucher


Associated Document  
File Name:    File Extension:

[Standard Comments](#)    GoTo Source    Fetch Item Specs

OK    Cancel    Refresh

In the comments box type in any information that the vendor may need as well as quote information and any standard comments that will help purchasing process your requisition. Please make sure the  **Send to Vendor** box is checked. This will allow your comments to print on the requisition cover sheet. Once all information has been entered click OK and you will return to the Form page.

NOTE: The purpose/ benefit statement no longer goes on this screen and will be added later in the Approval Comments Section.

You are now ready to save the requisition, click on the save icon  Save in the lower left corner of your screen. This will give you a requisition number.

UHS Finance Reporting DB

Home | Add to Favorites

New Window | Help | Customize P:

Form | **Schedule** | Approval | Documents

Unit: 00765 Req ID: 000002922 \*Req Date: 05/06/2008 Origin: ONL

\*Requester: MIMS,ERIC DELEGATED PURCHASER  Hold From Further Processing

Status: Open Budget Status: Not Ch'k'd Accounting Date: 05/06/2008 \*Currency: USD Dollar

Line	Item ID	Description	Req Qty	*UOM	Category	Price	Ship To	Status
1		PHOTOSHOP	1.0000	EA	20400	134.4000	VUC114	Active

Total Amt: 134.40 USD Total Base Amt: 134.40 USD

\*Go to: [Header Defaults](#) | [Header Comments...](#) | [Item Search](#) | [Item Detail](#) | [Line Defaults](#) | [Line Details](#)

Catalog | [Line Comments](#) | Sourcing Controls | ...More...

Save | Return to Search | Next in List | Previous in List | Notify | Refresh | Add | Update/Display

Form | [Schedule](#) | [Approval](#) | [Documents](#)

At this point, you are ready to attach documents, budget check and approve your requisition. Before you do that, take a look at the requisition by clicking on the **Documents** tab, then click on [Print Requisition Coversheet](#). This will pull up the requisition. Review the requisition and ensure that your entries are correct. If everything is correct, X out of the Requisition Cover Sheet. If changes are required, go back to the requisition and make the changes.

The process for attaching documents to your requisition works the same way as attaching documents to other PeopleSoft Finance Transactions.

UHS Finance Test DB

Home | Add to Favorites | Sign out

New Window | Help | Customize Page | net

Form | **Schedule** | Approval | **Documents**

Unit: 00730 Req ID: 000006664

[Print Requisition Coversheet](#)

Requisitions Document Images

Display Active Documents Only [Add New Document](#)

Save | Return to Search | Notify | Refresh | Add | Update/Display

Form | [Schedule](#) | [Approval](#) | [Documents](#)

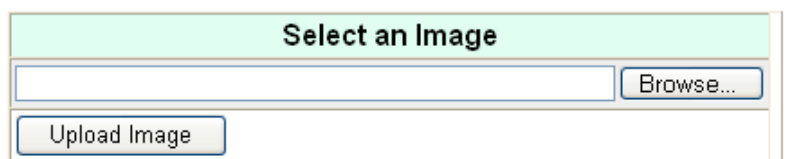
Click on **Add New Document** and follow the instructions.

**Req Document Upload**

---

**Instructions:**

1. Select an image file for this transaction by clicking the **browse button** below.
2. Upload the selected file by clicking the **upload image button**.



Once you have selected your document, the following screen will appear showing the document you selected.

**Req Document Upload**

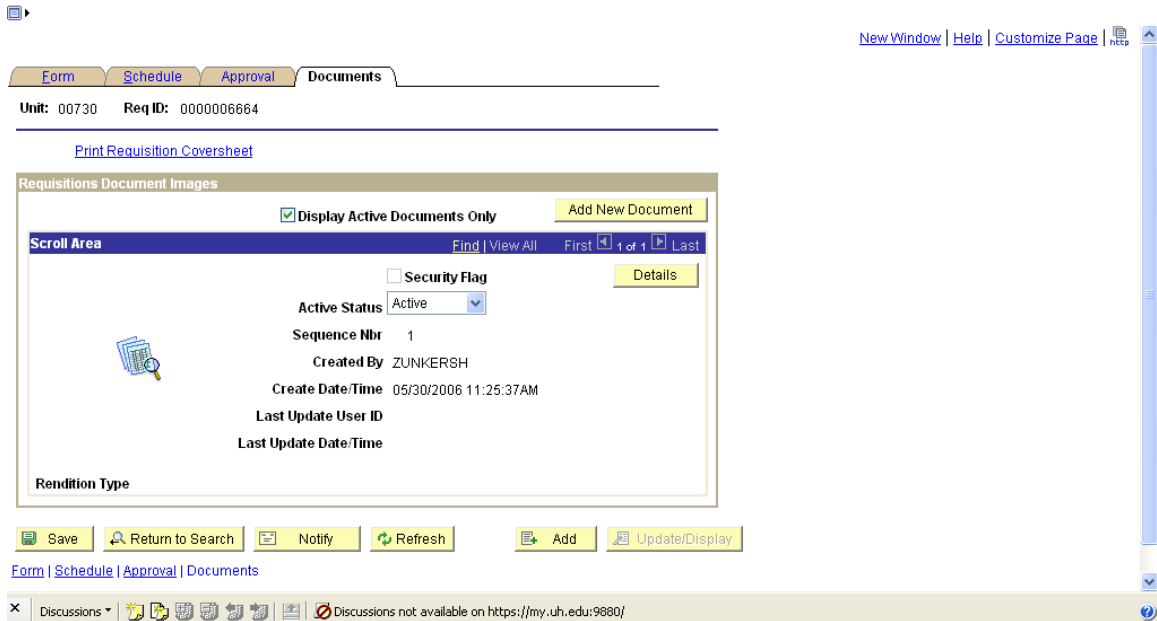
---



**Instructions:**

1. Select an image file for this transaction by clicking the **browse button** below.
2. Upload the selected file by clicking the **upload image button**.

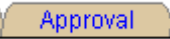


Click on **Upload Image** and the following page will appear.



You are now ready to Budget Check your requisition. Click on the  tab and then click on the Budget Check icon  in the upper right corner.

**NOTE: The requisition must be budget checked before it can be approved. This is a significant change from prior Requisition data entry.**

Once you get a valid budget check click on the  tab, the following page will appear.

Unit: 00765    Req ID: 0000002922

<b>Route To</b> *Please select the appropriate approval path: <input checked="" type="radio"/> Dept/Coll/Div - Purchasing Office <input type="radio"/> Dept/Coll/Div - OCG - Purchasing Office	<b>Source</b> Department V0016 Source <input type="text" value="ITS - Information Technology"/>
<b>Group Box</b> Business Unit 00765 Requisition ID 0000002922 OperID 0162254	<b>Approval</b> Approval Instance Approval Status Approval Action <input type="text"/> <input type="button" value="Apply"/>
<b>Comment Log</b> <div style="border: 1px solid #ccc; height: 40px;"></div>	
<input type="button" value="Add Comment"/>	

You will first need to enter the Purpose/ Benefit statement in the Add Comments box.

<b>Comment Log</b> <div style="border: 1px solid #ccc; height: 40px;"></div>															
<b>Add Comment</b> ENTER YOUR PURPOSE BENEFIT STATEMENT AND THEN CLICK SAVE. <div style="border: 1px solid #ccc; height: 30px;"></div>															
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th colspan="5">Approval History</th> </tr> <tr> <th style="text-decoration: underline;">Step</th> <th style="text-decoration: underline;">Status</th> <th style="text-decoration: underline;">Date/Time Stamp</th> <th style="text-decoration: underline;">User ID</th> <th style="text-decoration: underline;">Name</th> </tr> </thead> <tbody> <tr style="background-color: #f2f2f2;"> <td colspan="5" style="height: 20px;"> </td> </tr> </tbody> </table>	Approval History					Step	Status	Date/Time Stamp	User ID	Name					
Approval History															
Step	Status	Date/Time Stamp	User ID	Name											

| 
  | 
  | 
  | 
  |

Once you hit save that will move your Purpose/Benefit statement into the Comment Log.

**Comment Log**

05-12-08 02:50 PM : Robinson,Aurora: ENTER YOUR PURPOSE BENEFIT STATEMENT AND THEN CLICK SAVE.

**Add Comment**

**Approval History**

Step	Status	Date/Time Stamp	User ID	Name
------	--------	-----------------	---------	------

Save Return to Search Next in List Previous in List Notify Refresh

[Form](#) | [Schedule](#) | [Approval](#) | [Documents](#)

You may now select the appropriate approval path in the Route To box

**Route To**

\*Please select the appropriate approval path:

- Dept/Coll/Div - Purchasing Office
- Dept/Coll/Div - OCG - Purchasing Office

**NOTE: Dept/Coll/Div – Purchasing Office is used for most requisitions. Use the Dept/Coll/Div – OCG – Purchasing Office for requisitions using grant funds. This routes the requisition through the grants department for their approval.**

Once you have selected the appropriate approval path review the Source box

**Source**

Department V0016

Source

and ensure the source is correct. If it is not correct click on the down arrow and a list of all of the sources will appear.

You are now ready to approve the requisition. In the Approval box

**Approval**

**Approval Instance**

**Approval Status**

**Approval Action**

Click on the down arrow, click on approve, and then click on the Apply tab. Once you click on Apply you will get the following message.

Warning -- This transaction needs WF\_REQ\_COLLDIV approval. Enter it into workflow? (107,4)

This transaction must be approved. If you click OK, the system will route it to someone who can approve it; if you click Cancel, you can change the transaction without forwarding it.

When you click on "OK" the requisition has been submitted to workflow and has gone on to the next level of approval based on the Route To path you selected. Click OK and the following page will appear.

**UHS Finance Reporting DB** Home Add to Favorites Sign out

New Window | Help | Customize Page |

**Form** | **Schedule** | **Approval** | **Documents**

Unit: 00765 Req ID: 0000002922

**Route To**

\*Please select the appropriate approval path:

Dept/Coll/Div - Purchasing Office

Dept/Coll/Div - OCG - Purchasing Office

**Source**

Department V0016

Source ITS - Information Technology

**Group Box**

Business Unit 00765

Requisition ID 0000002922

OperID 0162254

**Approval**

Approval Instance 1184641

Approval Status Pending

Approval Action

**Comment Log**

05-12-08 02:50 PM : Robinson,Aurora: ENTER YOUR PURPOSE BENEFIT STATEMENT AND THEN CLICK SAVE.

05-12-08 02:56 PM : Dept/Coll/Div - Purchasing Office : Approve : Robinson,Aurora:

**Add Comment**

**Approval History**

Step	Status	Date/Time Stamp	User ID	Name
	Initiated	05/12/08 2:56:06PM	0162254	Robinson,Aurora
Step 1	Pending	05/12/08 2:56:06PM		
Step 2	Pending	05/12/08 2:56:06PM		

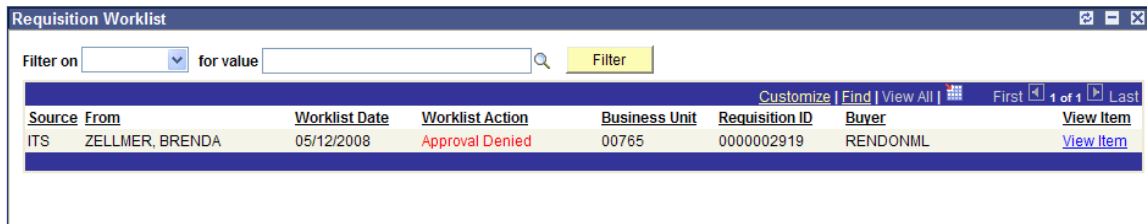
[Form](#) | [Schedule](#) | [Approval](#) | [Documents](#)

Notice that the Comment Log and Approval History Boxes show the approval path history and at what approval level your document is pending.

Requisition will now appear in your department approver's worklist. Please ensure that you department approver is notified or schedules a time to approve requisitions that are in their list. Once the department approve has approved the requisition it moves on to Purchasing for final approval.

**NOTE: Purchasing has the final approval and until Purchasing approves this requisition, the status of the requisition will remain Open.**

At any time during the approval process the requisition may be DENIED. If a requisition is Denied, it will appear in YOUR worklist because you were the initiator and you will receive an email stating it was denied. A sample worklist appears on the next page.



Source	From	Worklist Date	Worklist Action	Business Unit	Requisition ID	Buyer	View Item
ITS	ZELLMER, BRENDA	05/12/2008	Approval Denied	00765	0000002919	RENDONML	<a href="#">View Item</a>

**[View Item](#)**

To determine why the requisition was denied, click on the [View Item](#) link.

**Approval**

Once the Form page of the requisition appears, click on the **Approval** tab and the following page will appear.

UHS Finance Reporting DB

Home Add to Favorites Sign out

Unit: 00765 Req ID: 0000002922

Route To  
 \*Please select the appropriate approval path:  
 Dept/Coll/Div - Purchasing Office  
 Dept/Coll/Div - OCG - Purchasing Office

Source  
 Department V0016  
 Source ITS - Information Technology

Group Box  
 Business Unit 00765  
 Requisition ID 0000002922  
 OperID 0162254

Approval  
 Approval Instance 1184641  
 Approval Status Denied  
 Approval Action  
 Apply

Comment Log  
 05-12-08 02:56 PM : Dept/Coll/Div - Purchasing Office : Approve : Robinson,Aurora:  
 05-12-08 03:08 PM : Dept/Coll/Div - Purchasing Office : Approve : Ferguson,Joseph Stephen:  
 05-12-08 03:09 PM : Dept/Coll/Div - Purchasing Office : Deny : ZELLMER, BRENDA: PLEASE ATTACH THE QUOTE FROM SHI.

Add Comment

Step	Status	Date/Time Stamp	User ID	Name
	Initiated	05/12/08 2:56:06PM	0162254	Robinson,Aurora
Step 1	Approved	05/12/08 3:08:34PM	0083773	Ferguson,Joseph Stephen
Step 2	Denied	05/12/08 3:09:38PM	0807122	Zellmer,Brenda Elaine

Save Return to Search Notify Refresh Add Update/Display

Form | Schedule | Approval | Documents

Look at the **Comment Log**. The person that denied the requisition should give a brief statement as to why the requisition was denied.

Once you correct the requisition, save and check to see if it still has a valid budget check, if not, budget check and then approve the requisition following the previous procedures.

The requisition will then be re-submitted in workflow.

Good Luck! Please contact the Purchasing Department if you need any help at all!

Brenda Zellmer - Ext 823  
 Mary Lou Rendon – Ext 821