



**FINANCIAL SERVICES**

**UMBC**

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# PEOPLESOFT 9.2 REQUISITION APPROVAL

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## REQUISITION APPROVAL SECURITY

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### PEOPLESOFT ONLINE APPROVAL FOR DEPARTMENT FORM 9.2

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Security for Approval is granted via the [PeopleSoft Online Approval For Department 9.2 Form](#).

The person keying the transaction enters the departments that will be paying for the Requisition. Approvers associated with those departments will be notified.

## STEP1: APPROVAL NAVIGATION OPTIONS

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### APPROVAL FROM EMAIL

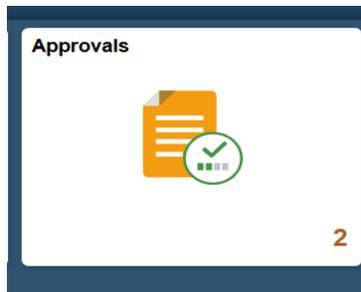
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If an Approver is NOTIFIED via email, the email link will direct the approver to the exact transaction to approve.

### APPROVAL FROM APPROVAL TILE

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Approver may also access the "Approval Tile" via this navigation: **From Employee Self Service Home Page>Approvals Tile**. The "Approval Tile" below has 2 pending item for Approval as indicated by the number in lower right corner.



Clicking on the "Approval Tile" will bring the Approver to see the list of Pending Items. This screen will display summary information.

If there are different types of Pending Items for approval, the type and number of Pending items will be listed.

## APPROVAL STEPS

### STEP 2: REVIEW PENDING ITEM SUMMARY

The full screen will show the Description of the Pending Items. The left side of the screen lists the types of transactions to approve.



Employee Self Service		Pending Approvals	
View By	Type		
All	3	All	3 rows
Journal Entry	2	<b>Journal Entry</b> 1.00 USD	REIMBURSEMENT FOR SEMESTER LUN - UMBC1 / 0000209573 / 2018-02-27 / UMBC1 Ken Griggs Routed 03/03/2018 >
Requisition	1	<b>Journal Entry</b> 101.00 USD	Travel was incorrectly charged - UMBC1 / 0000209593 / 2018-02-28 / UMBC1 Ken Griggs Routed 03/03/2018 >
		<b>Requisition</b> 499.00 USD	Dell PC - UMBC1 / 0000025491 Ken Griggs ⚠ Medium Priority Routed 03/06/2018 >

If the transaction type is selected, “Requisition”, the middle of the screen will display only that type:



<b>Requisition</b> 499.00 USD	Dell PC - UMBC1 / 0000025491 Ken Griggs ⚠ Medium Priority	Routed 03/06/2018 >
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- Requisition is the transaction type
- Amount 499.00, USD
- The **Requisition Description is “Dell PC III**
- UMBC1 is business unit
- 000025491 is Requisition
- “Ken Griggs” is person that keyed this transaction
- Routed is the date it was routed to the approver

## STEP 3: REVIEW PENDING DETAIL / ATTACHMENTS

The approver can click on the Pending Item to review the summary of the Requisitions

**Pending Approvals**      **Requisition**

Request for DELL PC for Room 202  
499.00 USD

1 line(s) are pending your approval

**Summary**

Business Unit UMBC1      Requisition ID 0000025492  
Routed Date March 6, 2018      Requisition Date March 6, 2018  
Requester Ken Griggs      Entered by Ken Griggs  
Budget Header Status Not Budget Checked

▼ **More Information**

Header comments and attachments >

▼ **Lines**

Pending All

1 row

1 DELL PC III      499.00 USD

▼ **Lines**

Pending All

1 row

1 DELL PC III      499.00 USD

**Distributions**

**Fluid Approval Distribution**

Line 1  
Schedule 1  
Item Description DELL PC III  
Merchandise Amount 499.00 USD  
Quantity 1.0000 EA

Distribution Line	Requisition Quantity	GL Business Unit	Merchandise Amount	Currency Code	Account	CS Projects CF	Fund Code	Department
1	1.0000	UMBC1	499.00	USD	7099950		11	

## STEP 4: APPROVE TRANSACTION

The next step is to approve the transaction by clicking the green “Approve” Button in the upper right corner.

The screenshot displays the 'Pending Approvals' section for a Requisition. The main header shows 'Request for DELL PC for Room 202' with a value of '499.00 USD'. In the top right corner, there are three buttons: 'Approve' (green), 'Deny', and 'More'. Below the header, a message states '1 line(s) are pending your approval'. The 'Summary' section provides details: Business Unit (UMBC1), Routed Date (March 6, 2018), Requisition ID (0000025492), Requisition Date (March 6, 2018), Requester (Ken Griggs), Entered by (Ken Griggs), and Budget Header Status (Not Budget Checked). A 'More Information' section contains a link for 'Header comments and attachments'. The 'Lines' section has tabs for 'Pending' and 'All', with 'Pending' selected. A table below shows one line item: '1 DELL PC III' with a value of '499.00 USD'. A '1 row' indicator is visible on the right side of the table.

A smaller box appears to Submit. The Approval Comments are optional for APPROVALS.

The modal dialog box is titled 'Approve' and features three buttons at the top: 'Cancel', 'Approve', and 'Submit'. The main text reads 'You are about to approve this request.' Below this is a text input field labeled 'Approver Comments'. The dialog is designed to capture the user's decision and any optional comments before finalizing the approval.

## APPROVAL FROM CAMPUS WORKCENTER

In addition to the Approval Tile above, two menus are available to an approver from the Campus Workcenter:

- **Requisition Approvals**
- **Manage Requisition Approvals**

The screenshot displays the 'myUMBC Finance' interface. The left sidebar shows a navigation menu with 'Requisition Approvals' and 'Links' sections. The main content area is titled 'Manage Requisition Approvals' and features a search section with fields for Requisition ID, Business Unit, Date From, Date To, and Requester. Below the search section is a table of requisitions with columns for Action/Status, Req ID, Requisition Name, Bus. Unit, Date, Requester, Entered By, and Total. The table shows one pending requisition with a total of 12234.00. Below the table are options to 'Mark All' (Approve, Deny, Hold) and a 'Submit' button.

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
Pending	0000025490	Requisition Name	UMBC1	03/06/2018	Michael Swierczewski	Michael Swierczewski	12234.00

These both allow the Approver to review the details and approve the transaction.

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## DENIAL

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### STEP 5: DENY TRANSACTION

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The same Steps are followed if a transaction is Denied.

**Please include explanation in the Deny Comments for the Entry person.** The Entry person will receive an email with a link to access this transaction.

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## AD-HOC

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### AD-HOC APPROVAL

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An approver may also choose to add an Ad-Hoc Approver or Ad-hoc Reviewer to the Approval Chain. Ad-hoc Approver requires that the person that is added approve the transaction.



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### AD-HOC REVIEW

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An approver may also choose to add an Ad-hoc Reviewer to the Approval Chain. The pending item is sent to the Ad-hoc Reviewer for 'information only' and requires no "Approval" Action.