

eProcurement Tasks  
for  
Site Administrators

June 2017

San Diego Unified Schools

## eProcurement

### Approve or Deny eProcurement Requisitions

Requisitions (*a.k.a. "ePros"*) created within our eProcurement software are online forms we use to order goods and services. An employee within your department creates and submits the ePro. Upon submission, the ePro is sent automatically to your PeopleSoft Financials Worklist on your computer. As the principal, site administrator, or department head, it is your responsibility to examine each ePro requisition submitted to you, to ensure appropriate funds are used to purchase the items being ordered. You can either approve the requisition or deny it. You can also deny individual items on a single requisition and approve the rest of the items.

***It is important to note that ONLY designated approvers are permitted to approve ePro requisitions.*** A designated approver must be a site administrator, such as a principal or department head. Approvers are required to approve or deny all items submitted to them.

It is against district policy and may constitute fraud for an approver to give his/her private password to anyone else to enable them to do that approver's approvals as proxy. Approvers must sign into the PeopleSoft system and do their own approvals. **Giving your password to other people places you and them at risk! Someone with your password can gain access to your personal information, such as Social Security number and paycheck.**

When you approve an ePro requisition it is removed from your Worklist, and automatically sent on to the Strategic Sourcing and/or Supply Center departments to have the order filled. When you deny an ePro requisition, it is removed from your Worklist. The person who originated (*created and submitted*) the requisition can keep track of it on his/her own computer. He/she can see that the requisition was denied, and can then edit it and re-submit it, if desired, or else cancel it.

**NOTE:** When the originator (*requester*) cancels an ePro requisition, and then runs the Budget Check process afterwards, the money that was pre-encumbered to that order is returned into the same budget from which it was taken. However, that money is not immediately available for use. It becomes available after the district Budget Department runs the reconciliation of the district's budgets. It could be one week or longer before the reconciliation occurs.

**NOTE:** It is the responsibility of the Approver to verify the pertinent Chartfields (*budget codes*) used in ePro requisitions. If you approve a requisition that uses wrong or inappropriate budgets, the Approver will be held responsible, not the requester/originator.

### ***Approve or Deny an eProcurement Requisition – Example Exercise***

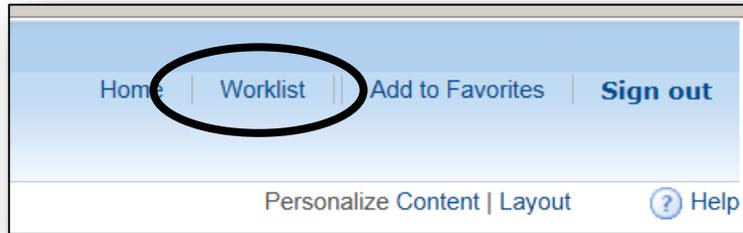
The following exercise walks you through the steps to approve or deny an ePro requisition.



### **Approve or Deny an eProcurement Requisition**

#### **Step 1**

You can navigate to your eProcurement Worklist by clicking on the hyperlink **Worklist** from the header in the upper right corner.



**Step 2**

To see the details of a requisition that's been submitted to your Worklist, click the blue hyperlink **Requisition ID** number to access the Requisition Approval page.

**Worklist**

Worklist for 119964: Alex Doe

Detail View      Worklist Filters:

Worklist Items						Personalize	Find	View All	Print	Calendar	First	1-4 of 4	Last
From	Date From	Work Item	Worked By Activity	Priority	Link								
Kris Doe	09/30/2013	Approval Routing	Approval Workflow	<input type="text"/>	<a href="#">ERApproval, 1105361, SDUSD, N, 0, SUCFET, ID:0000100002,</a>	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>						
Leslie Doe	10/06/2014	Approval Routing	Approval Workflow	2-Medium <input type="text"/>	<a href="#">Requisition, 3598391, SDUSD, 2012-02-16, N, 0, BUSINESS, UNIT:SDUSD, REQ, ID:REQ251694,</a>	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>						
Leslie Doe	10/06/2014	Approval Routing	Approval Workflow	2-Medium <input type="text"/>	<a href="#">Requisition, 3598395, SDUSD, 2012-02-16, N, 0, BUSINESS, UNIT:SDUSD, REQ, ID:REQ251695,</a>	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>						
Leslie Doe	10/06/2014	Approval Routing	Approval Workflow	2-Medium <input type="text"/>	<a href="#">Requisition, 3598401, SDUSD, 2012-02-16, N, 0, BUSINESS, UNIT:SDUSD, REQ, ID:REQ251696,</a>	<input type="button" value="Mark Worked"/>	<input type="button" value="Reassign"/>						

### Step 3

Select the line items you wish to view (you should select all of them) by clicking a checkmark into each line item's checkbox (to the left). Then click the **View Line Details** button.

Requisition Approval

Business Unit SDUSD  
 Requisition ID REQ251694  
 Requisition Name Student Forms  
 Requester Leslie Doe  
 Entered on 10/06/2014  
 Status Pending  
 Priority Medium  
 Budget Status Valid

Total Amount 70.44 USD

Requester's Justification  
 No justification entered by requester.

[View printable version](#)

Line Information ?

Line Information Personalize | Find | First 1-3 of 3 Last

	Line	Item Description	Supplier Name	Quantity	UOM	Price	
<input checked="" type="checkbox"/>	1	DO NOT ADMIT TO CLASS 50 COP...	SAN DIEGO UNIF	12.0000	PAD	0.27000	USD
<input checked="" type="checkbox"/>	2	STUDENT CHANGE OF ASSIGNMENT...	GRAPHIQUES	12.0000	PK	3.35000	USD
<input checked="" type="checkbox"/>	3	PERMIT TO LEAVE SCHOOL GROUN...	GRAPHIQUES	12.0000	PK	2.25000	USD

Select All / Deselect All

View Line Details  Approve  Deny

Review/Edit Approvers

### Step 4

A new, separate window appears. ***It is extremely important that every Department Approver verifies that the correct Department, Resource, Account, and Fund code numbers are being used for each item on every requisition.*** An Approver should also review the Item Description, Quantity, and Price, before approving a requisition. When done viewing this, simply close the browser tab or window.

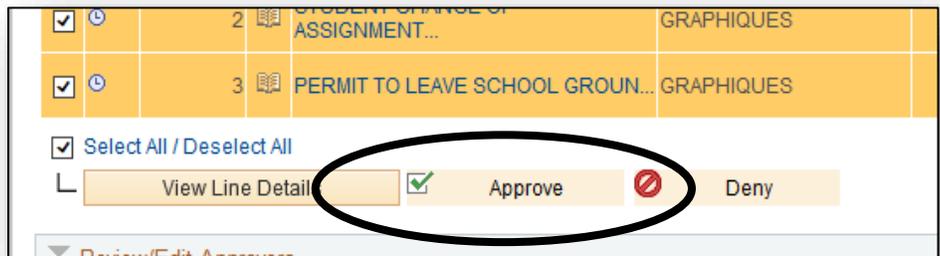
*(See Illustration on Next Page)*

<b>Business Unit:</b> SDUSD		<b>Requester:</b> 120080		<b>Status:</b> Pending Approval			
<b>Requisition:</b> REQ251694		<b>Requested By:</b> Leslie Doe		<b>Currency:</b> USD			
<b>Requisition Name:</b> Student Forms		<b>Entered Date:</b> 10/6/14		<b>Requisition Total:</b> 70.44			
<b>Line:</b> 1	<b>Item Description:</b> DO NOT ADMIT TO CLASS 50 COPIES PER PAD 22D5700	<b>Quantity:</b> 12.0000	<b>UOM:</b> PAD	<b>Price:</b> 0.27	<b>Line Total:</b> 3.24		
<b>Line Status:</b> Pending							
<b>Ship Line:</b> 1		<b>Ship To:</b> 5983A	<b>Address:</b>		<b>Shipping Quantity:</b> 12.0000		
<b>Attention:</b> Leslie Doe		<b>Due Date:</b>	Supply Center 2351 Cardinal Ln BLDG K San Diego CA 92123-3743 United States		<b>Shipping Total:</b> 3.24		
<b>Dist</b>	<b>Status</b>	<b>Location</b>	<b>Qty</b>	<b>PCT</b>	<b>Amount</b>	<b>GL Unit</b>	<b>Account</b>
1	Open	0003A	12.0000	100.00	3.24	SDUSD	4301
<b>Dept</b>	<b>Fund</b>	<b>Program</b>	<b>Class</b>	<b>Budget Ref</b>			
0003	01000	1000	1110	00			
<b>Open QTY</b>	<b>Open Amt</b>						
12.0000	0.000						
<b>GL Base Amount</b>	<b>Currency</b>	<b>Sequence</b>	<b>Capitalize</b>				
3.24	USD	0	N				
<b>Chartfield 1</b>	<b>Chartfield 2</b>						
00000	0000						

**NOTE:** If a requisition is approved and the Chartfield account information is incorrect, then the Approver will have to explain why the incorrect information was not adjusted before approving the requisition. To have the information adjusted before approval, the Approver must deny the requisition so that the Requester can make the adjustments and re-submit the requisition.

**Step 5**

After verifying that all the information is correct, approve the requisition. If you have any doubts, then it's probably best to hold onto the requisition until all questions are

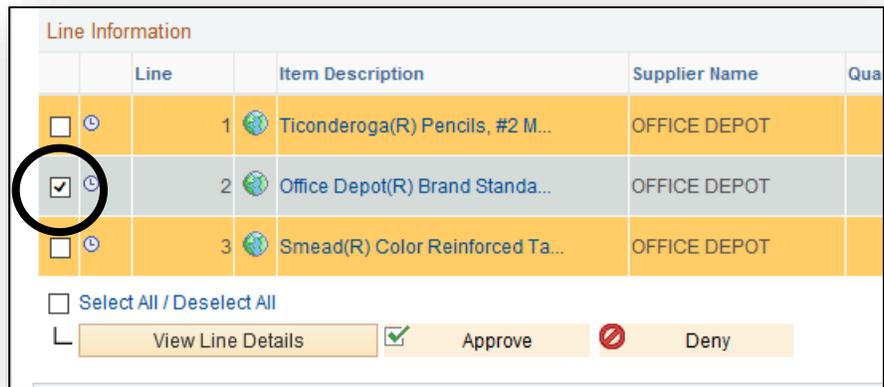


satisfied. Clicking the small blue **Return to Worklist** link at the bottom-left of the screen will keep the requisition fresh in your Worklist until you're ready to either approve or deny it.

The Worklist maintains all requisitions that require approval from the Worklist owner (*the Approver*). Once a requisition is approved it no longer appears on the Worklist.

If you want to deny a single item on a requisition, but approve the rest of the items, follow these steps after opening the requisition from your Worklist:

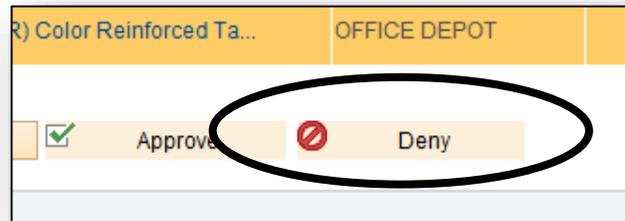
1) Checkmark only the item you want to deny:



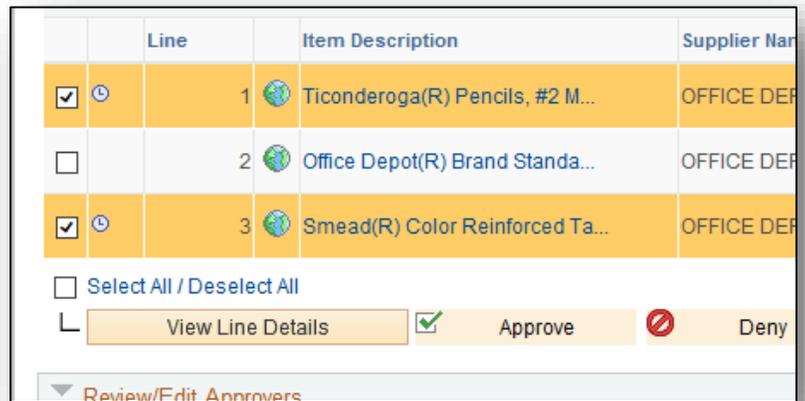
2) Scroll to the bottom left of the page, and in the **Enter Approver Comments** field, type in an explanation why you are denying the item:



3) Scroll back up and click the **Deny** button:



4) Ensure that the other items you do want to approve now have checkmarks next to them, and the item you denied is grayed out. Then, click the **Approve** button.



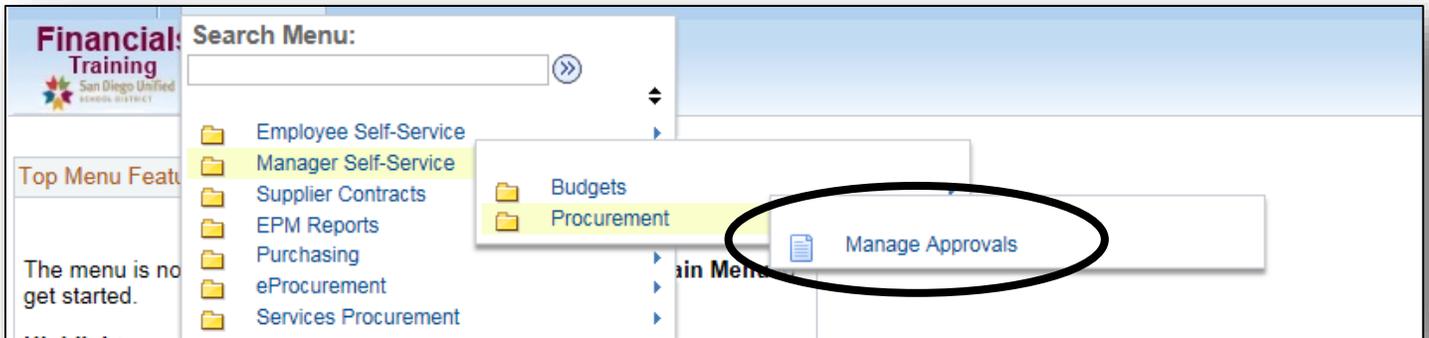
If you want to deny an entire requisition, leave all the items checkmarked, and enter the reasons for denying the order in the **Enter Approver Comments** field. Then click the **Deny** button.



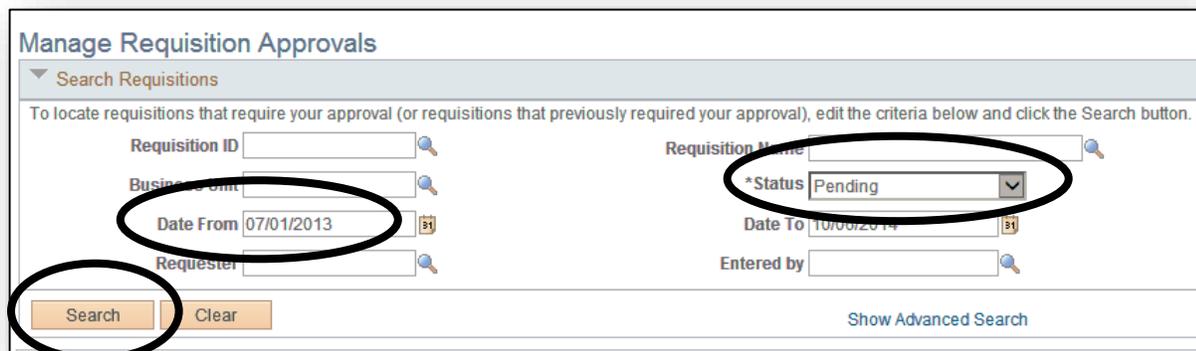
Be sure to check your Worklist on a regular basis (*about twice a week*). Verify all work before approving any requisitions.

### Manage Your Approvals

You can view all requisitions you've approved or denied in the **Manage Approvals** page. To get there, you must navigate by clicking *Manager Self-Service* → *Procurement* → *Manage Approvals*:



On the Manage Approvals page you have a variety of options as to what you wish to view and how you want to view it. You can filter the list by choosing the **Status** of the ePro orders you want to see, as well as adjusting the **date range**. You can also filter it by ID number, etc. Then, click the **Search** button:



To see the details of one order, click its small gray arrow button (*the **Expand Section** button*) to the left:

Action/Status	Line	Punchout Item	Item Description	Supplier Name	Price	Qty	UOM
✓ Approved	1		Ticonderoga(R) Pencils, #2 Medium Soft Lead...	Office Depot	8.45 USD	10.0000	Box
✗ Denied	2		Office Depot(R) Brand Standard Staples, 1/4...	Office Depot	2.53 USD	12.0000	Package
✓ Approved	3		Smead(R) Color Reinforced Tab Fastener Fold...	Office Depot	23.18 USD	10.0000	Box

## ePro Requisitions Report

To view all the details about your school's or department's eProcurement requisitions, you can run an easy query that generates a report. The report is called **List Sites ePros**. The query name that generates this report is **SD\_SITES\_EPRO\_REQS**.

Its details include:

- Requisition ID number
- Requester employee ID number (*who created the requisition*)
- Item descriptions & ID numbers
- Requisition date
- Requisition status
- Budget(s) used and their status
- What was ordered, how many, costs

When you run this query, it returns data based on the following criteria you enter:

- Your Department code number
- Date frame (you enter the beginning and ending dates for the frame of time during which requisitions you want to know about were processed)

The next illustration is of an eProcurement Requisitions report. It's quite wide, and so is shown here in three pieces:

1	List sites EPROs	339					
2	Req ID	Requester	Item Descr	Line #	Sched #	Distribution #	Item ID
3	0000106791	122930	ENCOUNTER ODORCOUNTERACTANT-QT 61133336	1	1	1	
4	0000106791	122930	BIOODOR CONTROL ODOR DIGESTER12X1	2	1	1	
5	0000106791	122930	PULL OUT-QUARTS	3	1	1	
6	0000106791	122930	48280 KLEENEX INTERFOLDBATHROOM TISSUE 36 PKS OF 250	4	1		
7	0000106791	122930	23504 ENVISION SINGLEFOLD TOWEL16-250 SHEETS PER CS	5	1		
8	0000107143	110013	APPLIANCE NETWORK DT122 W/INTEL ATOM Z530 POROCESSOR	1	1		
9	0000107143	110013	MEMORY 16GB FLASH FOR NETWORK APPLIANCE	2	1	1	00000000
10	0000107143	110013	KEYBOARD/MOUSE USB FOR NETWORK APPLIANCE	3	1	1	00000000
11	0000107143	110013	MONITOR LENOVO L197 WIDE SCREEN 4434HE1	4	1	1	00000000
12	0000107143	110013	SPEAKER THINKVISION USB SOUND BAR 40Y7616	5	1	1	00000000
13	0000107143	110013	ASSET TAGGING (APPLIANCE 1)	6	1	1	00000000
14	0000107143	110013	CA E-WASTE RECYCLING FEE (APPLIANCE 1)	7	1	1	00000000
15	0000107369	110013	APPLIANCE NETWORK DT122 W/INTEL ATOM Z530 PROCESSOR.	1	1	1	00000000
16	0000107369	110013	MEMORY 16GB FLASH FOR NETWORK APPLIANCE	2	1	1	00000000
17	0000107369	110013	KEYBOARD/MOUSE USB FOR NETWORK APPLIANCE	3	1	1	00000000
18	0000107369	110013	MONITOR LENOVO L197 WIDE SCREEN 4434HE1	4	1	1	00000000
19	0000107369	110013	SPEAKER THINKVISION USB SOUND BAR 40Y7616	5	1	1	00000000
20	0000107369	110013	ASSET TAGGING (APPLIANCE 1)	6	1	1	00000000

**Far Left Side**

2	Item ID	Req Date	Status	BD Hdr Status	BD Ln Status	Origin	UOM	Qty	Item Price	Ext Amt	DeptID	Resource	Bud Ref
3		7/30/2009	Complete	Valid	Valid	EDX	CS	1.0000	75.17000	75.170	0003	00031	00
4		7/30/2009	Complete	Valid	Valid	EDX	CS	1.0000	97.69000	97.690	0003	00031	00
5		7/30/2009	Complete	Valid	Valid	EDX	CS	1.0000	93.34000	93.340	0003	00031	00
6		7/30/2009	Complete	Valid				00	27.35000	54.700	0003	00031	00
7		7/30/2009	Complete	Valid				00	18.24000	72.960	0003	00031	00
8	000000000000007517	8/10/2009	Complete	Valid				00	375.00000	26250.000	0003	77100	00
9	000000000000007518	8/10/2009	Complete	Valid	Error	ONL	EA	70.0000	75.00000	5250.000	0003	77100	00
10	000000000000007519	8/10/2009	Complete	Valid	Error	ONL	EA	70.0000	10.00000	700.000	0003	77100	00
11	000000000000007520	8/10/2009	Complete	Valid	Error	ONL	EA	70.0000	134.50000	9415.000	0003	77100	00
12	000000000000007521	8/10/2009	Complete	Valid	Error	ONL	EA	70.0000	27.00000	1890.000	0003	77100	00
13	000000000000007522	8/10/2009	Complete	Valid	Error	ONL	EA	70.0000	2.50000	175.000	0003	77100	00
14	000000000000007523	8/10/2009	Complete	Valid	Error	ONL	EA	70.0000	16.00000	1120.000	0003	77100	00
15	000000000000007517	8/15/2009	Approved	Valid	Valid	ONL	EA	70.0000	375.00000	26250.000	0003	77100	00
16	000000000000007518	8/15/2009	Approved	Valid	Valid	ONL	EA	70.0000	75.00000	5250.000	0003	77100	00
17	000000000000007519	8/15/2009	Approved	Valid	Valid	ONL	EA	70.0000	10.00000	700.000	0003	77100	00
18	000000000000007520	8/15/2009	Approved	Valid	Valid	ONL	EA	70.0000	134.50000	9415.000	0003	77100	00
19	000000000000007521	8/15/2009	Approved	Valid	Valid	ONL	EA	70.0000	27.00000	1890.000	0003	77100	00
20	000000000000007522	8/15/2009	Approved	Valid	Valid	ONL	EA	70.0000	2.50000	175.000	0003	77100	00
21	000000000000007523	8/15/2009	Approved	Valid	Valid	ONL	EA	70.0000	16.00000	1120.000	0003	77100	00

**Center**

2	Bud Ref	Account	Program	Class	Fund	Extended	Distrib Status
3	00	4302	8100	0000	01000	0000	Complete
4	00	4302	8100	0000	01000	0000	Complete
5	00	4302	8100	0000	01000	0000	Complete
6	00	4302	8100	0000	01000	0000	Complete
7	00	4302	8100	0000	01000	0000	Complete
8	00	4491	8500	0000	35000	8631	Canceled
9	00	4491	8500	0000	35000	8631	Canceled
10	00	4491	8500	0000	35000	8631	Canceled
11	00	4491	8500	0000	35000	8631	Canceled
12	00	4491	8500	0000	35000	8631	Canceled
13	00	4491	8500	0000	35000	8631	Canceled
14	00	4491	8500	0000	35000	8631	Canceled
15	00	6400	8500	0000	35000	8631	Processed
16	00	6400	8500	0000	35000	8631	Processed
17	00	6400	8500	0000	35000	8631	Processed
18	00	6400	8500	0000	35000	8631	Processed
19	00	6400	8500	0000	35000	8631	Processed
20	00	6400	8500	0000	35000	8631	Processed
21	00	6400	8500	0000	35000	8631	Processed

**Far Right Side**

## Create and Run an ePro Requisitions Report – Example Exercise

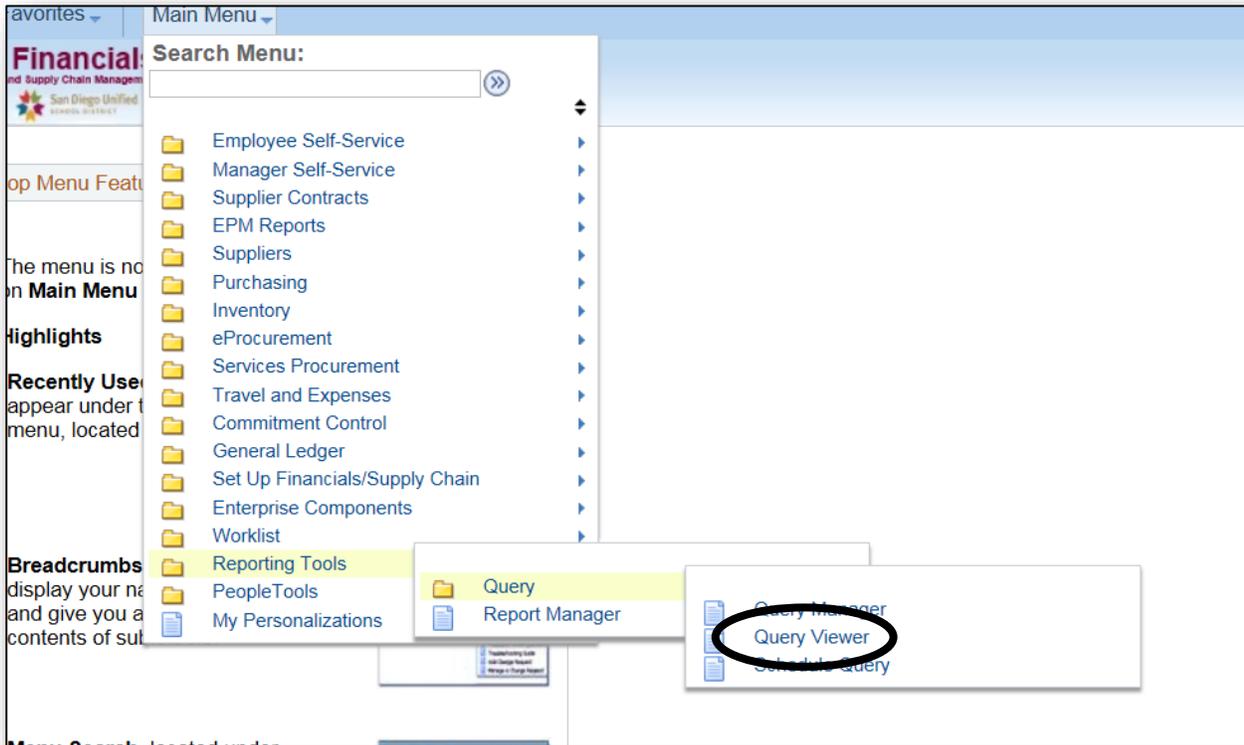
The following exercise walks you through the steps to create the eProcurement Report. Many people find this to be an easy to run, yet valuable report. It displays all the details about every eProcurement requisition order that has been created within your school or department.



### Run an eProcurement Report Query

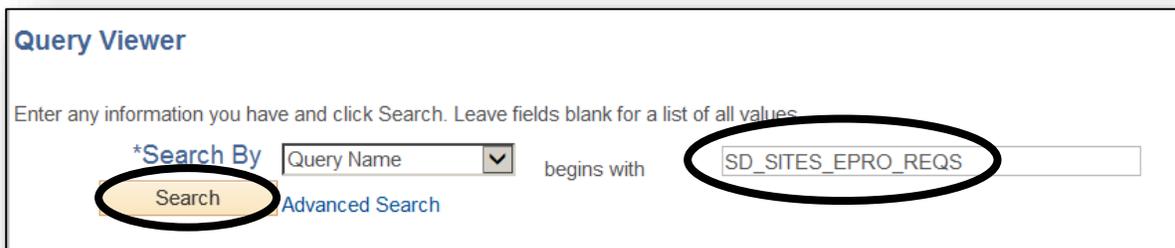
#### Step 1

Navigation: **Reporting Tools** → **Query Viewer**



#### Step 2

In the “**begins with**” textbox, type the title of the query and then click the **Search** button. The title is: **SD\_SITES\_EPRO\_REQS**



### Step 3

The query title will appear on the screen. You can choose between running the query to an **HTML** window or to an **Excel** spreadsheet. In this example, we'll run the query to an Excel spreadsheet.

Click the **Excel** hyperlink:

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
SD_SITES_EPRO_REQS	List sites EPROs	Public		HTML	Excel	XML	Schedule	Favorite
SD_SITES_EPRO_REQS_USERID	List sites EPROs	Public		HTML	Excel	XML	Schedule	Favorite

### Step 4

When the query window appears, you need to enter your criteria and then click the **View Results** button to run the query. In this example, we entered criteria to view all ePro requisitions for Department 0003 from 7/1/14 thru 10/07/14:

**SD\_SITES\_EPRO\_REQS - List sites EPROs**

Department:

Req Date Greater Than:  

Req Date Less Than:  

### Step 5

The results are displayed in an Excel spreadsheet we can edit, sort, and/or save:

	A	B	
1	List sites EPROs	84	
2	Req ID	Requester	Item Descr
3	REQ272104	122930	AJAX SOFT CLEANSER 21 OZ
4	REQ272104	122930	4410 CM 44GL HUSKEE BACKSAVERCAN GREY
5	REQ272314	122930	SANITIZER PURELL2LITER CR
6	REQ272831	123265	Words Their Way Word Study in Action - 978142843162
7	REQ272831	123265	Words Their Way: Word Study In Action - 9781428431379
8	REQ272831	123265	Words Their Way: Word Study In Action - 978142841386
9	REQ272831	123265	Words Their Way: Word Study In Action - 9781428431393
10	REQ272831	123265	Words Their Way: Word Study In Action - 9781428431400