

Purchasing contact 405-325-2811

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New 9.0 Training Materials
For New Approvers**

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Menu Choices

- ✓ Click on the 'Worklist' hyperlink – top right corner
- ✓ Click on the 'Worklist' link – from the menu



PeopleSoft

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Requisition ChartField Approval

Unit: OUHSC Req: 0000039912 Requester: Wilson, Julene "Jean" D. (R)

Appr Act: Approval Status: In Process [View Printable Req](#)

Comment

WORKFLOW TEST
APPROVED BY PURCHASING
RECYCLE 6-12-05

Distributions/ChartFields [Customize](#) | [Find](#) | [View All](#) | [First](#)

Line	Sched	Distrib	Status	GL Unit	Account	Fund	Org	Program	SubClass	ProjC
1	1	1	Open	OUHSC	600100	STATE	ADM171	00016	00000	

Worklist for JWILSON: Wilson, Julene "Jean" D. (R)

[Detail View](#)

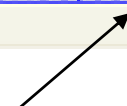
Work List Filters:

Worklist Customize						
From	Date From	Work Item	Worked By Activity	Priority	Link	
Batch Processing User	04/04/2006	Approve ChartFields Worklist	Requisition ChartField Appr	<input type="button" value="v"/>	61318, OUHSC, 0000039912	

By clicking on the Requisition number, the information about that Requisition will be displayed so you can complete the process.

Link

[61318, OUHSC, 0000039912](#)



Review Information

Requisition ChartField Approval

Unit: OUHSC Req: 0000039912 Requester: Wilson, Julene "Jean" D. (R)

*Appr Act:

Approval Status: In Process

Comment

WORKFLOW TEST
APPROVED BY PURCHASING
RECYCLE 6-12-05

Distributions/ChartFields

[Customize](#) | [Find](#) | [View All](#) | First Last

Distribution

Line	Sched	Distrib	Status	GL Unit	Account	Fund	Org	Program	SubClass	Proj/Grant
1	1	1	Open	OUHSC	600100	STATE	ADM171	00016	00000	

Line Details

Requisition ChartField Approval

Unit: OUHSC Req: 0000039912 Requester: Wilson, Julene "Jean" D. (R)

*Appr Act:

Approval Status: In Process

Comment

WORKFLOW TEST
APPROVED BY PURCHASING
RECYCLE 6-12-05

Distributions/ChartFields

[Customize](#) | [Find](#) | [View All](#) | First Last

Distribution

Line	Sched	Distrib	Status	GL Unit	Account	Fund	Org	Program	SubClass	Proj/Grant
1	1	1	Open	OUHSC	600100	STATE	ADM171	00016	00000	

Line Details

[Customize](#) | [Find](#) | First Last

Amounts/Qty

Details

Line	Sched	Status	Amount	Currency	Base Amt	Base Currency	Reg Qty	UOM	Revision
1	1	Active	10.000	USD	10.000	USD	2.0000	EA	

- Be sure once you've selected a Requisition to finish the process.
- If not finished, it will still show up as 'selected' on your worklist, and will not proceed through workflow until more action is taken.
- If the department has more than one approver the selected Requisition will no longer be available on the other approvers worklist.

Approver Options

The Appr. Act field will default to **Approve**.

Click 'Save'



Appr Act:

If **Deny** is selected:

Type in the reason the Requisition has been denied and any special instructions to the Creator, plus instruct the Creator to contact Purchasing to recon funds.

Click 'Save'



Appr Act:

Requisition will automatically be cancelled

An email message, including comments typed in by the Approver, will automatically be sent to the Creator.

The Creator will have access to copy the Requisition and make the necessary changes. When the new Requisition is saved, a new Req. No. will be assigned.

Creator will receive this type of email message:

Requisition ID 0000039912 has been denied.
7-1-06 - #1 - PLEASE USE ACCOUNT CODE 600100

If **Recycle** is selected:

Requisition will be re-routed and allow for additional handling

Click 'Save'



Appr Act:

An email message, including comments typed in by the Approver, will automatically be sent to the Creator.

The Creator will have access to the Requisition and make the necessary changes. The recycled Requisition is saved and workflow will route it back to the Approver.

Creator will receive this type of email message:

Please check your worklist for Requisition ID : 0000039912, and make the necessary changes stated below.
7-1-06 - #1 - PLEASE USE ACCOUNT CODE 600100

❖ Feature: View Worklist Link



Allows the user to jump back to the Worklist and view the remaining Requisitions that need processing.

Worklist for JWILSON: Wilson, Julene "Jean" D. (R)

[Detail View](#) Work List Filters:

Worklist Customize					
From	Date From	Work Item	Worked By Activity	Priority	Link
Batch Processing User	04/04/2006	Approve ChartFields Worklist	Requisition ChartField Appr	<input type="text"/>	61318.OUHSC.0000039912
Batch Processing User	04/20/2006	Approve ChartFields Worklist	Requisition ChartField Appr	<input type="text"/>	61346.OUHSC.0000039928
Batch Processing User	04/20/2006	Approve ChartFields Worklist	Requisition ChartField Appr	<input type="text"/>	61347.OUHSC.0000039929

❖ Feature: Next in Worklist Link



Brings the next available Requisition to your screen for review

Requisition ChartField Approval

Unit: OUHSC Req: 0000039928 Requester: Wilson, Julene "Jean" D. (R)

*Appr Act: Approval Status: In Process [View Printable Req](#)

Comment

Distributions/ChartFields [Customize](#) | [Find](#) | [View All](#) | First 1 of 1

Line	Sched	Distrib	Status	GL Unit	Account	Fund	Org	Program	SubClass	Proj/Grant
1	1	1	Open	OUHSC	600100	STATE	ADM171	00016	00000	

[▶ Line Details](#)