Workflow

October 24,

2013

The “How To” Guide to Managing & Approving Documents in Workflow

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Procurement Process Flow For PeopleSoft Requisitions

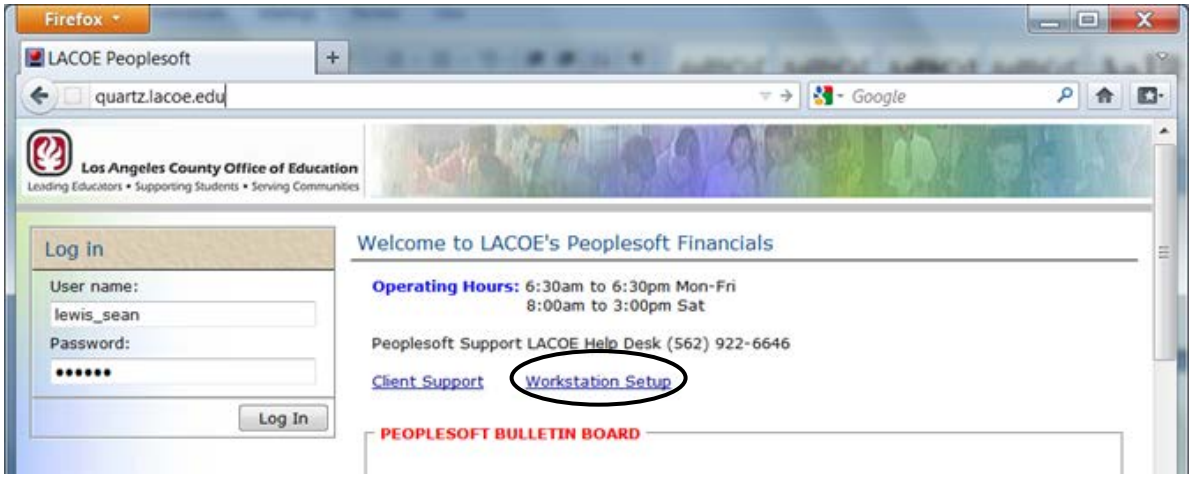
REQUESTER	**1**	INPUTS REQUISITION, BUDGET CHECKS, AND SENDS REQUISITION FOR APPROVAL	
DEAN/DIRECTOR OF DEPARTMENT DEAN/DIRECTOR OF DIVISION PROGRAM MANAGER	**2**	APPROVES REQUISITION	
ACCOUNTING	**3**	CHECKS ACCOUNT STRING	
DIRECTOR OF BUSINESS SERVICES	**4**	APPROVES REQUISITION	
VP OF DIVISION	**5**	APPROVES REQUISITION ≥ $1,000	
VP OF ADMINISTRATIVE SERVICES (CBO)	**6**	APPROVES REQUISITION ≥ $5,000	
PRESIDENT	**7**	APPROVES REQUISITION ≥ $25,000	
PURCHASING	**8**	SOURCES REQUISITION INTO PURCHASE ORDER & PLACES ORDER WITH VENDOR	
WAREHOUSE	**9**	RECEIVES ITEM INTO PEOPLESOFT & DELIVERS TO REQUESTER	
REQUESTER (REPLACES GOLDEN ROD)	**10**	PRINTS PR, VERFIES RECEIPT OF ITEMS, SIGNS AND WRITES OKAY TO PAY ON PR , THEN FORWARDS TO ACCOUNTING	
ACCOUNTING	**11**	VERIFIES INVOICE WITH PO & SIGNED PR FROM REQUESTER, THEN SUBMITS PAYMENT TO VENDOR	

Setting Up Your Workstation for PeopleSoft

Citirx must be downloaded on the workstation prior to using PeopleSoft. Steps 2-3 are download instructions for windows. Instructions to download to Mac can be found within the workstation link.

1. Type quartz.lacoe.edu into the web address bar.
   Windows: use Internet Explorer or Mozilla Firefox web browser Mac: Use Mozilla Firefox

2. Click the Workstation Setup link.



3. Click the link "Install Citrix Online Plug-in Web Client for Windows Windows7/Vista/XP/2003/2008." If you have Windows 2000, click the link "Install Citrix Web Client for Windows Vista/XP/2003/2000."

4. Click on the **Run** button when the new window appears. The program will automatically download and install. Normally it takes anywhere from 2-3 minutes to complete the installation from start to finish. If for some reason this option does not work, click the link again and Save to a location on your hard drive. After the download is complete, launch the program to install the Citrix ICA Web client.

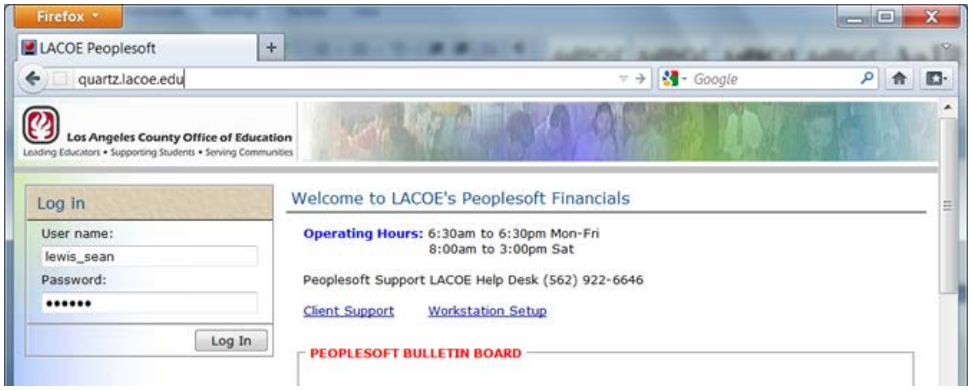
It's Very Important to close and re-launch your Browser after the completion of the installation.

NOTE: If your local machine does not permit you to save the file to your local hard drive, check with your on-site technical support for access permissions.

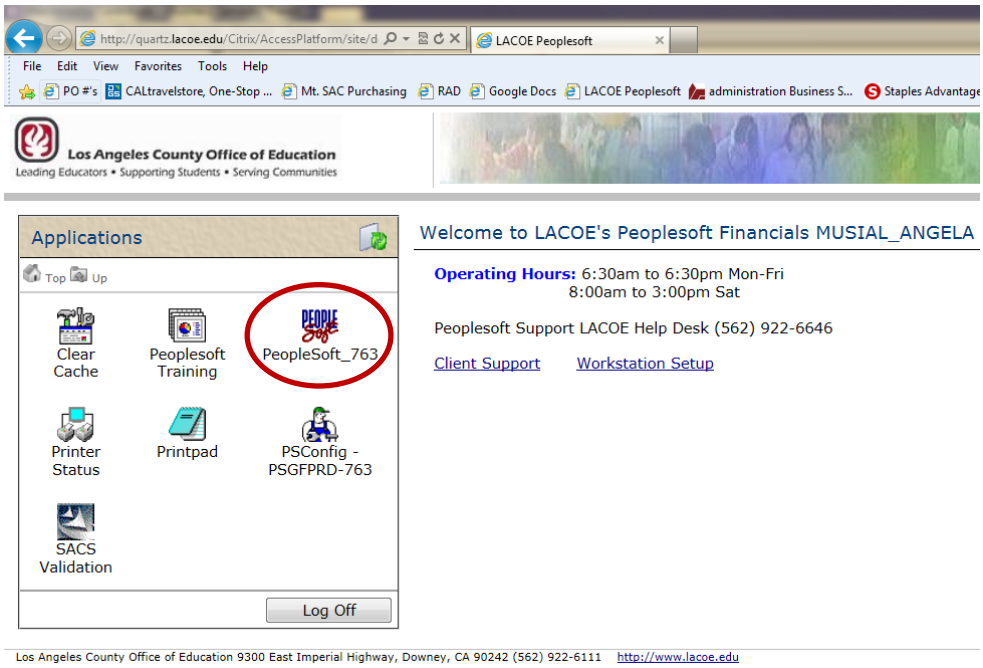
Logging into PeopleSoft

1. Type quartz.lacoe.edu into the web address bar.

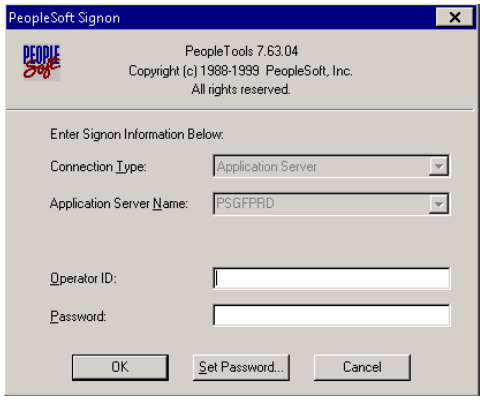
   Windows: use Internet Explorer or Mozilla Firefox web browser **Mac**: Use Mozilla Firefox



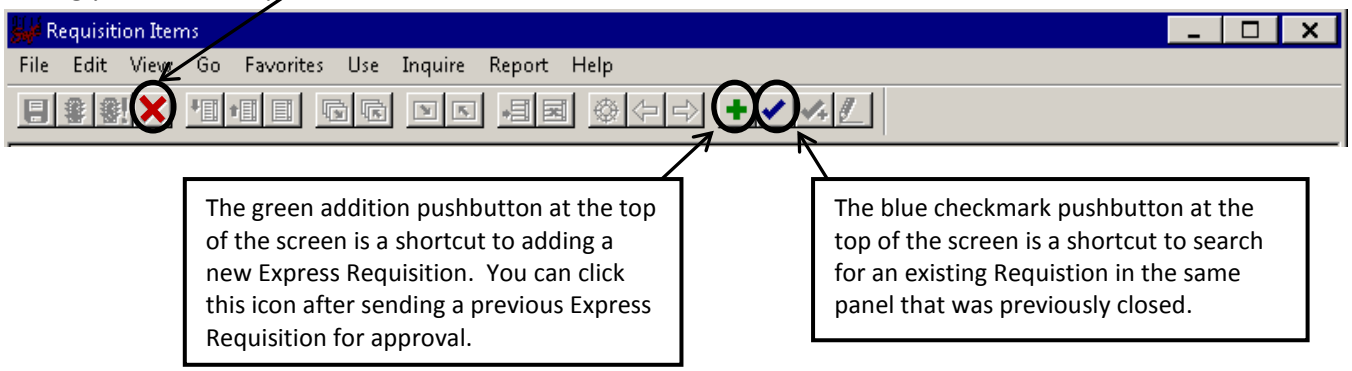
2. Type in your Citrix User name and Password , then click Log In.
3. Click on the PeopleSoft_763 icon.



4. Wait for the PeopleSoft Signon box to open, make sure your keyboard is in ALL CAPS, then type in your PeopleSoft Operator ID and Password. Click OK. Everything in PeopleSoft is done in ALL CAPS.



PeopleSoft Hotkeys

- F7 – Used to add additional account strings and additional Requisition lines.
- F8 – Used to delete account strings and Requisition lines.
- F4 – Used when in a field that has a list of selectable values. For example, UOM and Category codes.
- % – The percent sign acts as a wildcard. It can be used when searching a field for a specific value. For example, if a user is searching for a vendor with the word "DEPOT" in the name, by typing in "%DEPOT%", PeopleSoft will show all vendors with the word "DEPOT" in the name.
- **X** – The red X in the top left corner of the screen will close the current screen you are in without exiting you out of PeopleSoft.
- 

Favorites Menu

PeopleSoft has a menu called "Favorites" that acts like bookmarking in a web browser. After going into a screen via the regular navigation, click on the Favorites menu, then click "Add to Favorites" to add that panel to the Favorites Menu. From then on, that panel can be accessed by clicking Favorites, and selecting the panel name.

Email Notifications for Approvers

When requisitions are awaiting approval, an email (similar to the example below) will be sent to the approver at 10:00am and 2:00pm every day until the requisition is approved. Requisitions can be approved prior to receiving the email, especially in cases where something needs to be processed ASAP.

-------- Original Message --------
Subject:(PALLDEWL) PEOPLESOFT DOCUMENT(S) REQUIRES YOUR ATTENTION.
Date:18 Jun 2013 10:02:24 -0700
From:mvs@lacoe.edu
Reply-To:mvs@lacoe.edu
To:DKEELEN@AVC.EDU

FROM: PeopleSoft System
PEOPLESOFT DOCUMENT(S) REQUIRES YOUR ATTENTION.

The following transactions added to your worklist are awaiting
YOUR REVIEW & APPROVAL.

Document Type	Date	Business Unit	ID	Creation Date
PO Requisition	06/18/13	64253	TEST6-18	06/13/2013

Please login into Peoplesoft using your Operator ID/Password
to check your current worklist items.
P.S. - This is a System generated email; Please do not reply to this message.

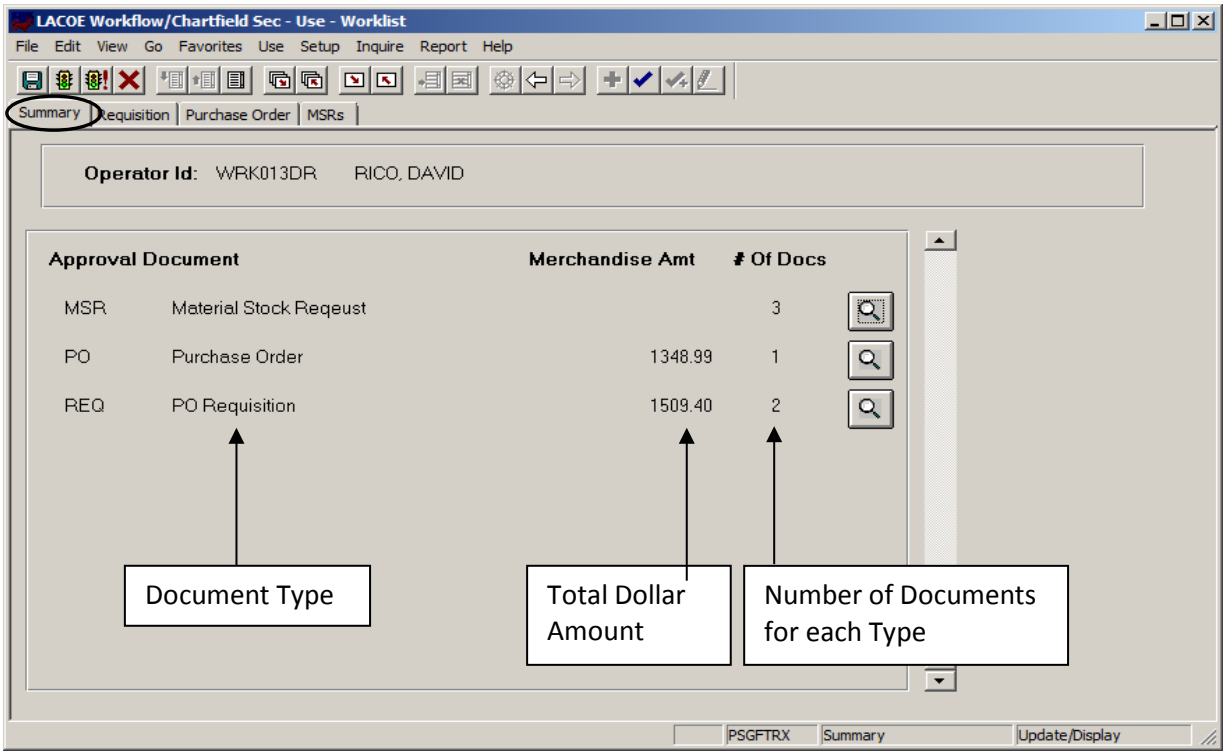
----
* DoNotReply System Generated Mail *
* PALLDEWL J0587196 ps2.lacoe.edu *
*   Tue 06/18/13.169 10:02am   *

Approve/Deny Workflow Documents

Menu: *Go* → Administer Procurement → LACOE Workflow/Chartfield Sec
Use → Worklist → Summary

Step I: Summary Tab

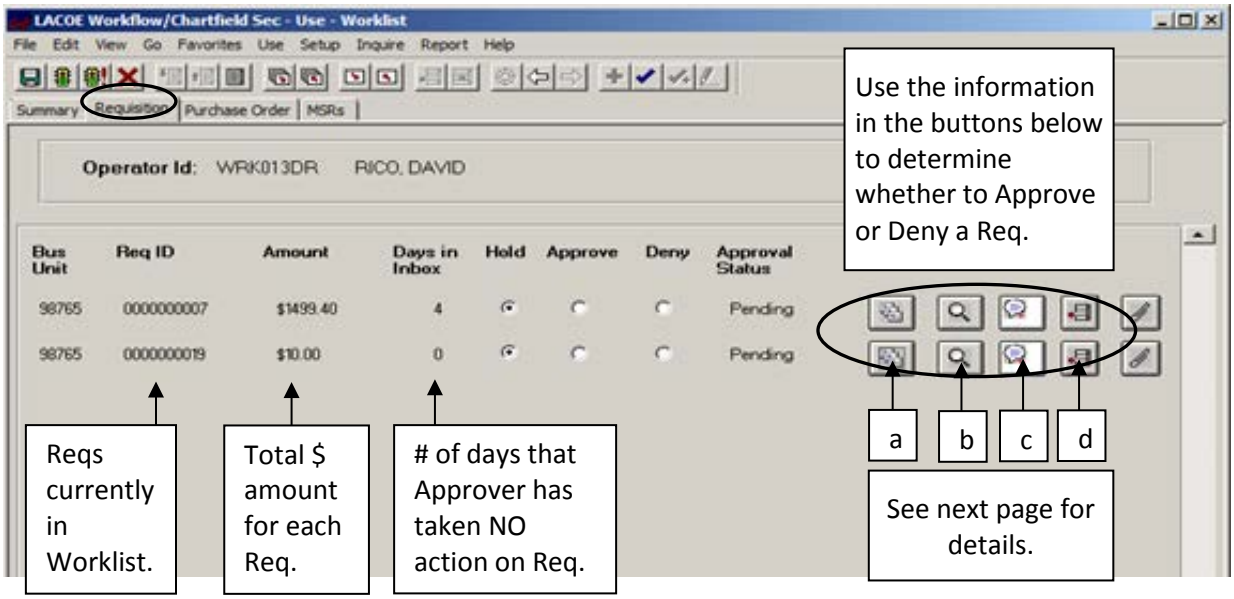
Indicates the type, dollar amount, and # of documents awaiting attention.*



*Our district is currently only setup to process and approve PO Requisitions (PeopleSoft Requisitions).

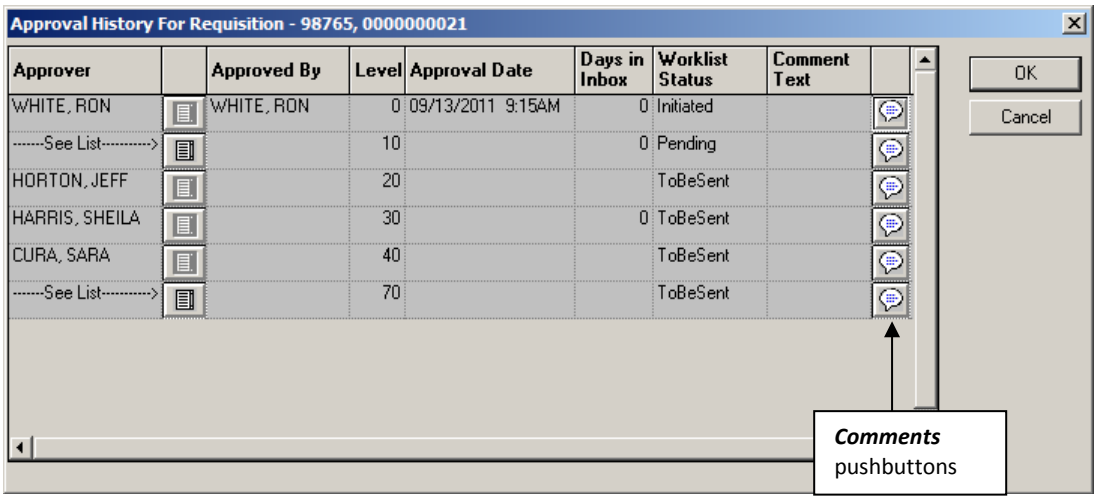
Step II – Requisition Tab

This is where you will Approve or Deny Requisitions
Gather information about the requisition:



Appr History/Comments

a. When selected, the following panel will appear:



This panel displays the Approval Matrix for the Document. It shows: All required Approvers for the Document, their Approval Level, Date and Time stamp of each action taken, and the Current Status at every Level.

The Comments pushbutton at the far right will also allow the Approver to view any Comments entered by other Approvers.

Document Details

b. When selected, the following new PeopleSoft panel will open:
Select the Print Pushbutton to view all the requisition information (Items, comments, account strings, etc.) on one screen.

View Attachments pushbutton –

Print pushbutton – Allows users to

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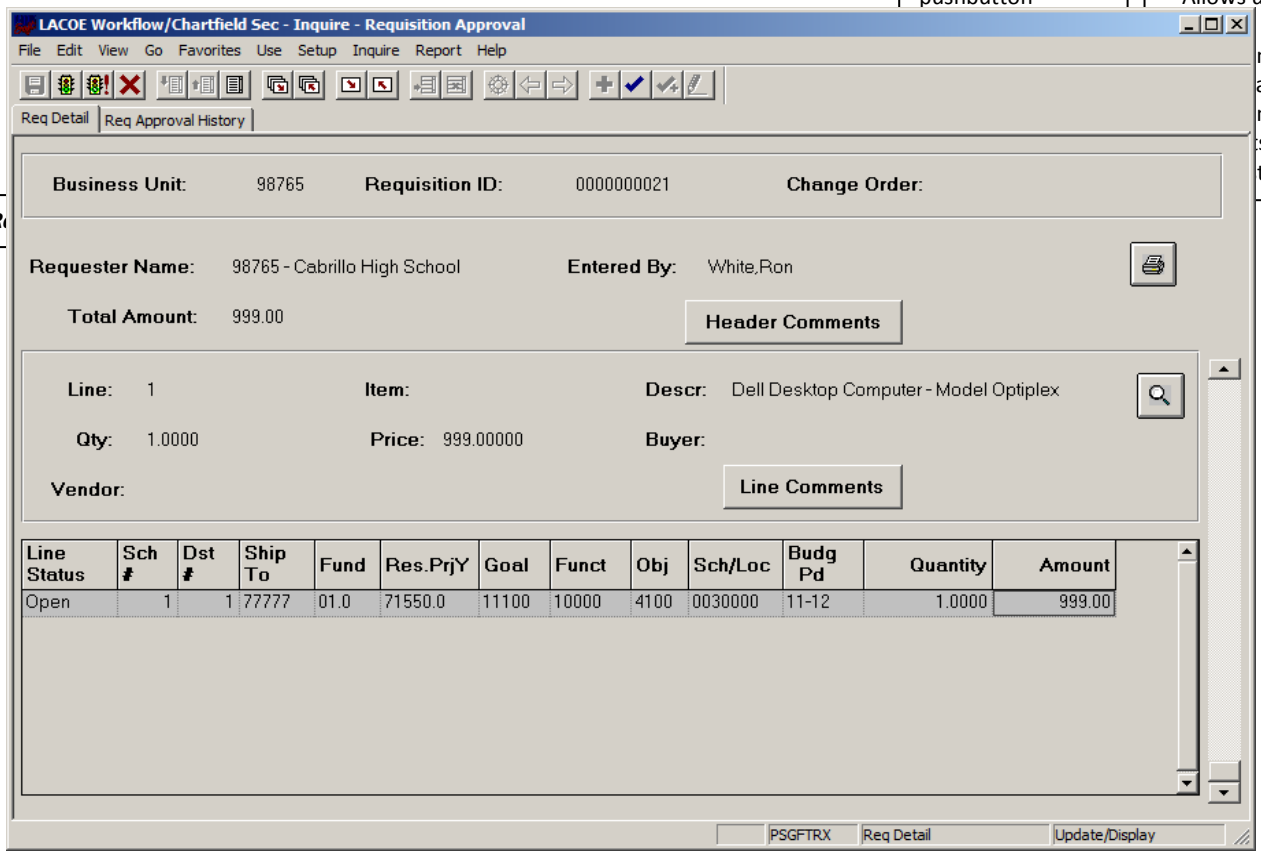
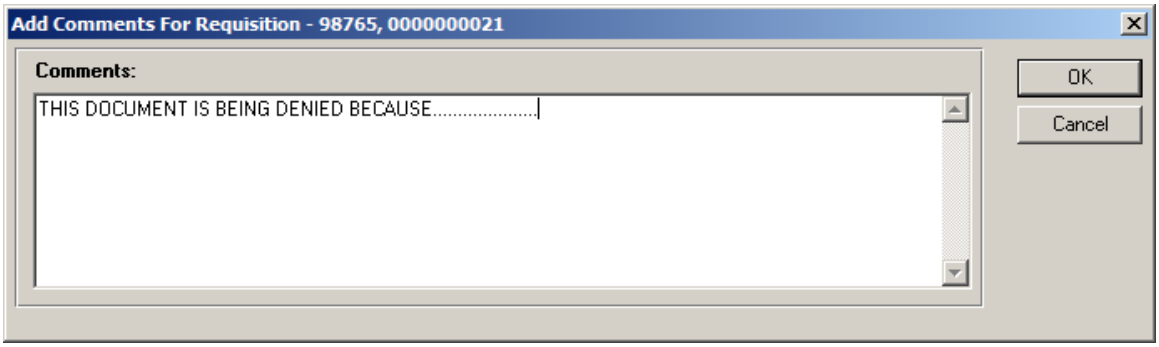


The *Req Detail* panel displays the Document in Inquiry mode. Most information about the Document can be viewed on this panel (Line Items, Descriptions, Prices, Account Strings, Comments, etc.). Viewing the actual Document will be very important for the Approver when deciding to Approve or Deny the Document. This panel will also allow the Approver to Print a hard-copy of the Document for their records and view attachments.

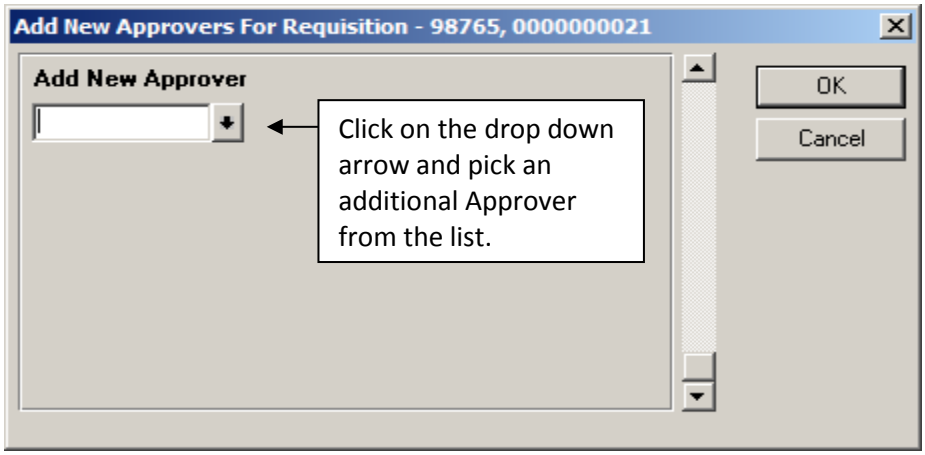
Add Comments

c. When selected, the following panel will appear and will allow the Approver to enter Approval/Denial Comments for the Document at his/her Level.



Add Approver

d. Under some circumstances, an Approver may wish to add an additional approver to Workflow for a requisition. For example, the IT Director for a computer purchase or the Facilities Planning Director for Furniture. Contact the additional approver for their PeopleSoft user ID or click the drop down arrow to select from a list.



Step III: Approve or Deny the Requisition

The Hold, Approve, and Deny Buttons on the Requisition tab are for the Approver to use when deciding what action to take on each Requisition. If the Approver selects Approve, the Requisition will go to the next level Approver. If the Approver selects Deny, it will be sent back to the Initiator. The Approver can also leave the Requisition on Hold if he/she is not ready to make a decision on the Requisition.

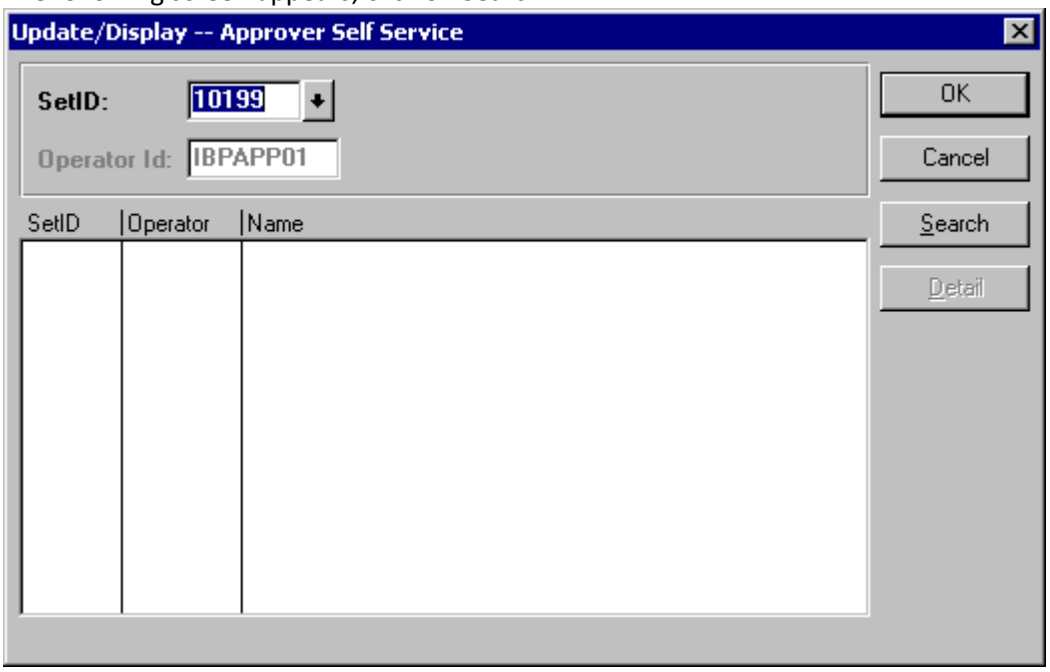
Remember to **SAVE** after making your selection!

Approver Self Service (Assigning an Alternate Approver)

If an approver is planning on being out of the office, it may be necessary to delegate someone to approve documents during those prolonged periods of absence.

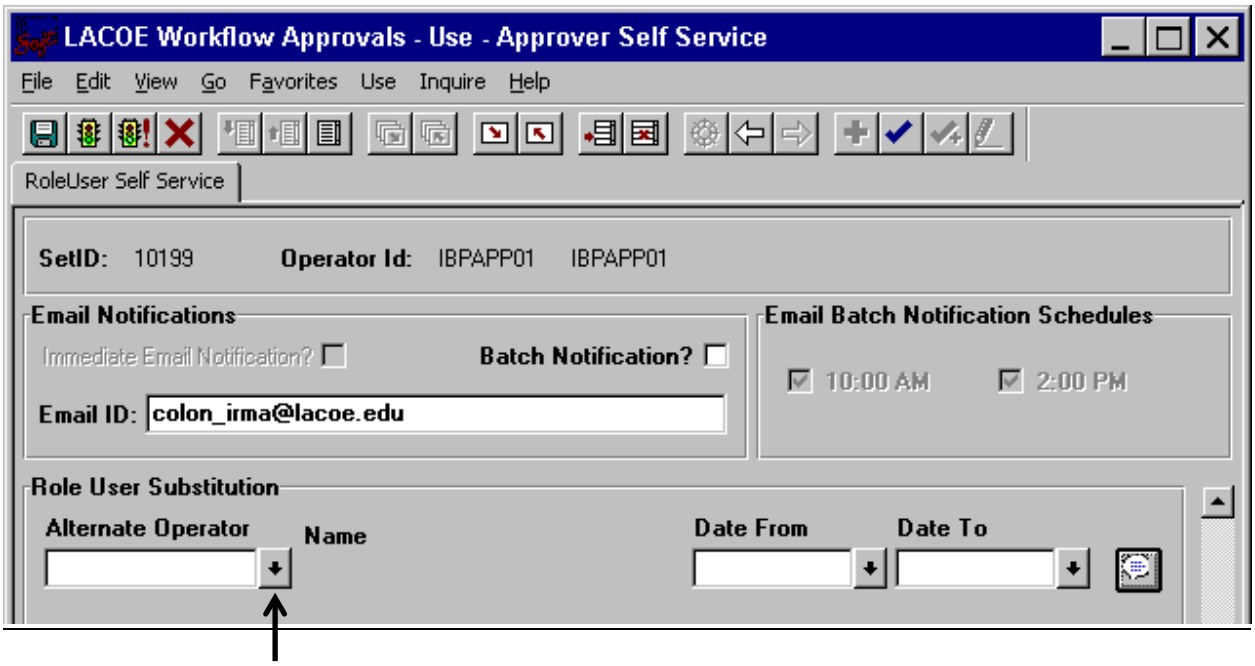
Menu: *Go* → Administer Procurement → LACOE Workflow/Chartfield Sec
Use → Approver Self Service

The following screen appears; click on Search.

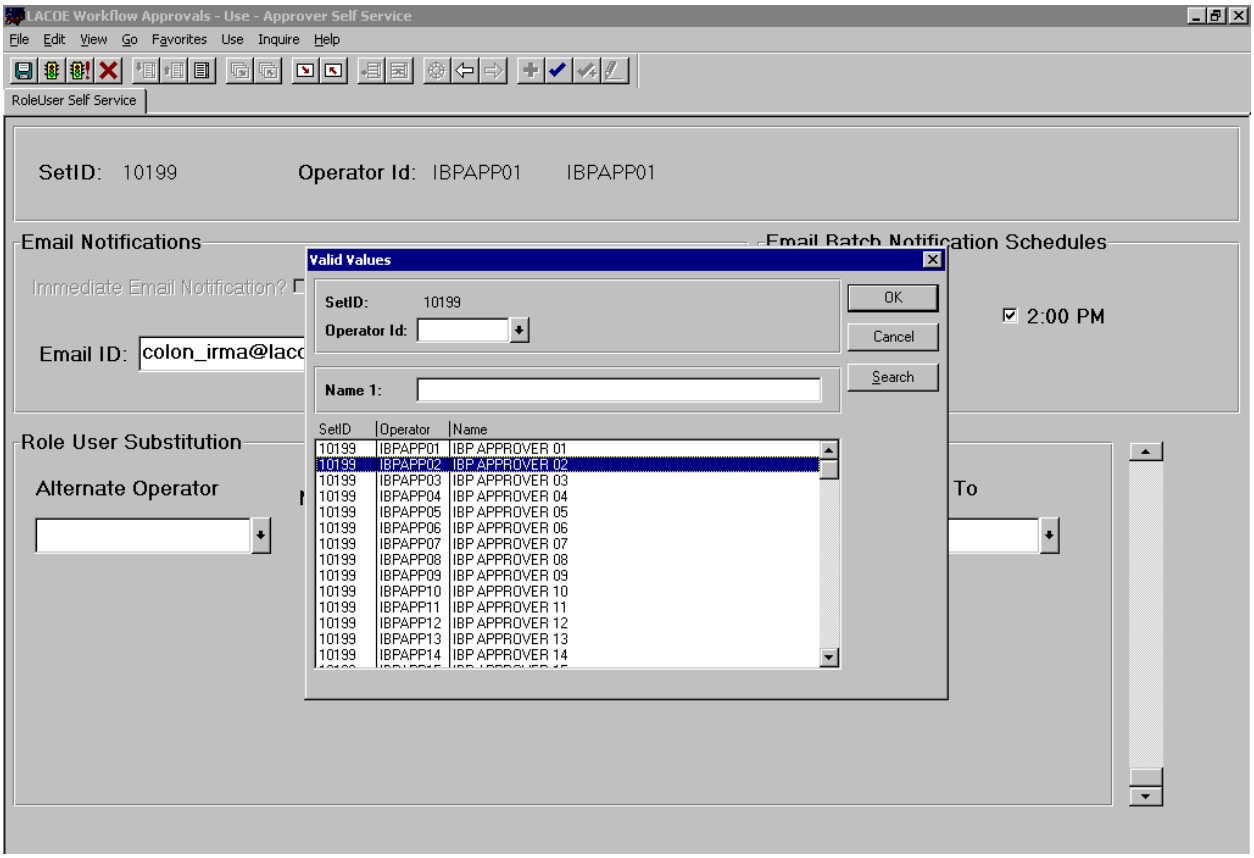


Your Operator ID and Name will appear; click on OK.

RoleUser Self Service panel appears.



Contact the Alternate Operator for their PeopleSoft user ID or click on drop down menu for a list of Alternate Operators, select Alternate Operator, and click OK.



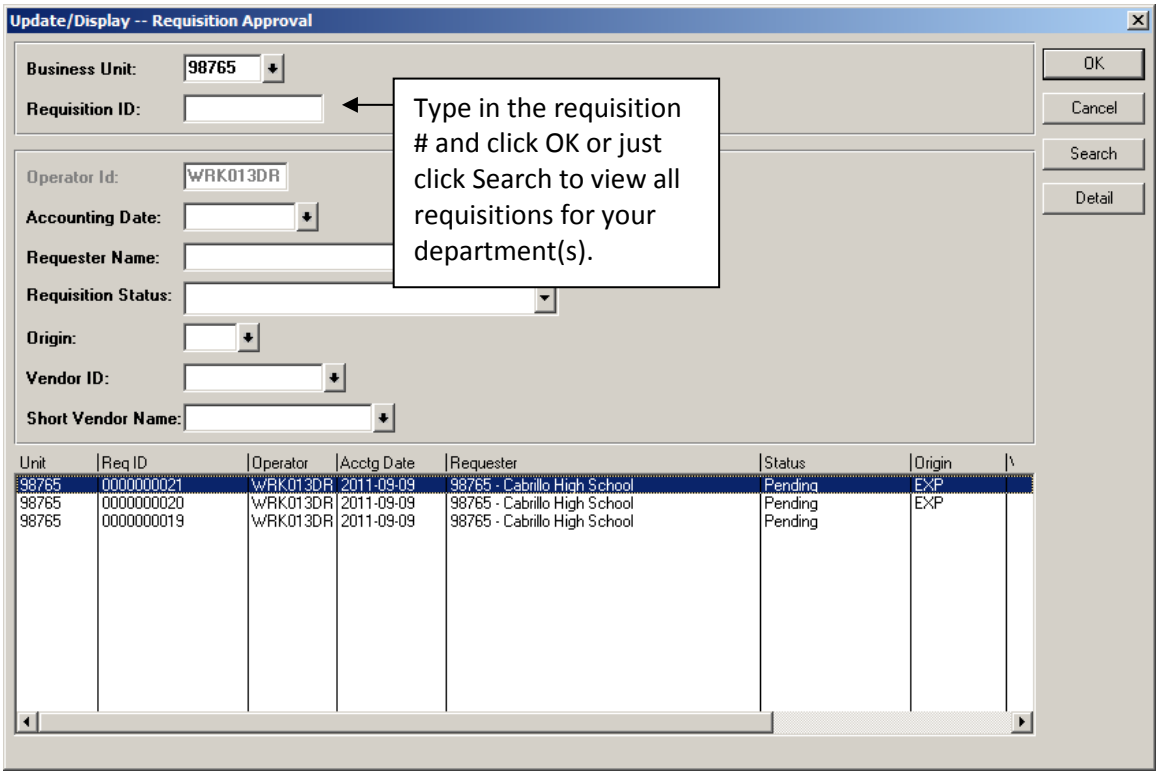
Enter Date From, Date To information and then click on Save icon.

While in the Alternate Operator box, hit the F7 key to add additional substitutions; hit F8 to delete additional substitutions.

Monitoring the Approval Process

Even AFTER Approvals/Denials have been given on a Document, Approvers can continue to monitor those same Documents. However, since these Documents no longer appear on the Approver's Worklist, the Navigation will be slightly different (*even though the panels being accessed will be the same*).

Menu: *Go* → Administer Procurement → LACOE Workflow/Chartfield Sec
Inquire → Requisition Approval → Req Approval History



Changes to Workflow Approvers

Purchasing must be notified ASAP when a workflow approver changes. Not notifying the Purchasing Department to update the system with any changes can result in an Audit Finding for the district.

Examples of Workflow Approver Changes:

New Program Coordinator
New Dean/Director for Department of Division
Etc.