Approval Flow

A submitted requisition can reach three states: Awaiting Buyer Approval, Budget Error, & Escalation. The ePro Administrator Assistant assigns requisitions based on their status.

If: In Budget Error

Requisition budgets can only be checked once a requisition is fully approved. Buyers can alert the ePro admins to the status, but an error report should be run daily to keep on top of them.

Query: REQ_BC_ERRORS

Reqs in error are entered into the monthly error spreadsheet on the I: Drive. The status of errors is captured here.

Search the req in Manage Requisitions - the data to fill out the error spreadsheet is listed. Click on Approvals to view if the req was assigned a Buyer or was a Marketplace Purchase.

In Approvals click Error next to Budget Status. This will show what type of error the req is in.

Exceeds Budget Tolerance (EBT)

EBT below 5K can be overridden by the ePro Admin team.

If it’s an EBT above 5K, click the notify button & email Budget. Email Grants if the req is a fund 20.

Then

No Budget Exists (NBE)

Any NBE must be sent via notify to Budget, or Grants if it’s a fund 20. They will clear it or give instructions on how to do so.

Then

If: Escalated

An escalation is either due to an approval line issue, or because an approver did not approve within 6 days of receiving a req.

If there is an approval line issue it is likely due to: Pharma, NIGP -0000, or Budget Ref Req. Pharma & NIGP -0000 escalations must manually be approved with a comment in Monitor Approvals. Budget Ref Req means the incorrect fiscal year was used when submitting the req & must be edited by the requester.

An escalation after 6 days is sent to the Director of Procurement. In Monitor Approvals, search pending reqs under the Director’s username. Reassign or deny as needed.

Reqs can escalate 3 times to Procurement, but are denied by the team the fourth time.

Then

If

Then

A query is run for pending requisitions, those not in Budget Error or Escalation are captured.

Query: 430_REQS_PENDING

Query data is copied & pasted into the excel spreadsheet: Requisition Template, maintained by the ePro Administrator. This sheet automatically assigns buyers requisitions per their departments.

The list is compared against previously issued requisitions on a separate excel spreadsheet using conditional formatting to view which are new.

New requisitions are pasted to the Buyers’ Weekly Spreadsheet contained on the I: Drive.

The ePro Administrator Assistant emails the requester, assigned Buyer, & Assistant Director of Procurement to let them know the requisition has been assigned. The template email informs the requester their requisition will not be approved until the Buyer has reviewed & confirmed all needed documentation is present.

Once the Buyer has approved the requisition on the weekly spreadsheet, the ePro admin may make the final approval in Manage Requisition Approvals.

Then

# Buyer Requisition Assignment

How the ePro administrator team assigns special requisitions from PeopleSoft’s eProcurement to the buyer team.

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