Training and Documentation Manual

End User Training: Approving an Order

Welcome to E-Requisitioning

Inside Tufts | Finance Division

Summer/Fall 2009

E-Req Training - Finance Division 2009
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Signing in from an E-mail

There are three different ways that an approver can approve a requisition. The first is directly from an e-mail that would be generated from the e-req procurement system. An example of such an e-mail is below:

```
From: ereq@list.tufts.edu [mailto:ereq@list.tufts.edu]
Sent: Monday, May 11, 2009 10:11 AM
To: Steve Lisa
Subject: Message from Epicor Procurement Approval

Requisition SL0051152777 is awaiting the approver.

ACTION LINKS
--------------
To go to the Procurement System, click here:
https://ereqtest.uit.tufts.edu/Epicor3Procurement
To go directly to the order, click here:
https://ereqtest.uit.tufts.edu/Epicor3Procurement/redirect.asp?To=OrderDetail&16092ID=75

ORDER SUMMARY
--------------
Requisition Number: SL0051152777
Supplier Name: ZCOMM - 386 Blake Street
Order Comment:
Requisition Description:
Order Total: 6,000.00 USD
```

You’ll be taken to the sign-in screen, which will then take you directly to that particular requisition mentioned in the e-mail (see pg 6).
Signing in from the Console directly

Alternatives two and three have you go to your browser and type 
https://ereqprod.uit.tufts.edu/EpicorEProcurement

You’ll be taken to the sign-in screen. Type in your Username and Password, then click the LOGIN button.

NOTE: Your login username & password are the same as it is for Tufts trumpeter e-mail (LDAP).
Alternative #2: At the console click on Approve an Order.

If you have chosen alternative #2, you will see this screen. You can click the approve or disapprove box, or the [+] next to Approve, which will let you see details (see next page).
By hovering over a requisition number you'll see information about it appear in a yellow box.

Click on the req # you want to view/approve.

From this point you can check off the approve box then Update.

Alternative #3 is to look down to the quick list area on the console, and click on the [+] under Orders to Approve, which will open up a list waiting for your approval.

By hovering over a requisition number you'll see information about it appear in a yellow box.
Approving/Disapproving a Requisition: No Change

STEP 1. Check Approve or Disapprove All for entire order or check individual lines.

STEP 2. Click to Approve/Disapprove

You may see this:

Would you like to save this page before exiting? Click 'OK' to save. Click 'Cancel' to continue without saving.

Enter Comments if necessary and click OK. Comments are not required but are required for disapprovals.
You will know it is approved because the Approve or Disapprove button disappears from your selections (assuming there are no other reqs to approve).

Want to double check? Click on the Approvals tab and you should see your approval, highlighted in green! There is a five minute refresh cycle in order to see the approval.

If there are other reqs to approve you will see this on your screen.
Approving/Disapproving a Requisition: With Change

If prior to approving a requisition you need to change an chartfield click on the pencil icon.

If you make a change, the requisition originator will be notified.

Change any attributes as you see appropriate including splits (directions for splits on next pages).

Click update when finished.
Choose the split method

Click **Edit** to change the distribution for the first split

Change as necessary and click **Update**
Change Amount, Percentage or Qty for this distribution and click Add Split.

Click Edit to change the distribution for the next split. Repeat steps for each distribution.
Click **Save Split Information** when done.

Remaining to allocate must = 0 for all.

Click **Update** to change distribution.
Need to add an approver just for this particular order? Here's how!

Click on the Approvals tab then the Ad Hoc Approvers button to add another approver for this order.
Print Requisition Feature

You can click on the Print Requisition button to view a requisition, print it out, or save it as a pdf. After clicking the Print Requisition button you will see this:

Note: you may need to call your FSP for technical assistance for things such as enabling “pop-ups”, etc.
This is the view req detail. If for some reason you need to print a copy, use the print icon.

You can also save this requisition as a pdf. Click on the first icon on the tool bar, export this report.
Viewing Status of Orders

Click on the check order status icon.

You will be taken to this screen, which defaults to Search.
**Personal Orders** are orders that you entered.

**Proxied** are orders that you entered as a proxy for another user.

**Approvals** are orders that you are an approver for (see below for screenshots).

Click here to expand (see below)

To sort, click on any column heading.

Clicking Approvals shows ALL orders for which you are an approver.

Click to view all order information. See viewing section for screenshots.
Pending shows orders waiting for your approval

Approved shows orders you approved

Disapproved shows orders you disapproved

**PLEASE NOTE:** if you are at this screen, orders are based on your last action. For example, if you approve an order and the next approver disapproves, you will still find the order in the approved folder, not the disapproved, because it files based on your last action.
## Icon Inventory

<table>
<thead>
<tr>
<th>Icon</th>
<th>Where it appears</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📝</td>
<td>Various</td>
<td>Show more information about the line (distribution, supplier, req type)</td>
</tr>
<tr>
<td>📦</td>
<td>Various</td>
<td>View/Add/Delete attachment</td>
</tr>
<tr>
<td>🗑️</td>
<td>Various</td>
<td>Delete item/distribution</td>
</tr>
<tr>
<td>📝</td>
<td>Order Status Page</td>
<td>PO sent to PeopleSoft (system said supplier)</td>
</tr>
<tr>
<td>✅</td>
<td>Order Status Page</td>
<td>Accept Order (will be turned off)</td>
</tr>
<tr>
<td>🚧</td>
<td>Order Status Page</td>
<td>Cancel the order</td>
</tr>
<tr>
<td>🔨</td>
<td>Order Status Page</td>
<td>Change order</td>
</tr>
<tr>
<td>📝</td>
<td>Order Status Page</td>
<td>Show more information about the order</td>
</tr>
<tr>
<td>🌐</td>
<td>Order Status Page</td>
<td>PO sent to PeopleSoft (system said supplier)</td>
</tr>
<tr>
<td>🌐</td>
<td>Order Status Page</td>
<td>Delete item/distribution</td>
</tr>
<tr>
<td>🌐</td>
<td>Order Status Page</td>
<td>Re-sends purchase order to supplier – This will NOT be used, the po will not be sent to supplier from the system.</td>
</tr>
</tbody>
</table>

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Going on Vacation?

If you are going to be on vacation and you are a regular approver, you will need to set up a proxy to approve in your absence. At the “console” screen, click any icon to view your User Preferences.

Now, click on Preferences on your menu bar - listed as the next to last. Click that link to define, update or view preferences.
If your settings are done, click Update.

If you are going on vacation, this is where you would assign an Approval Proxy. If you don’t put an end date, the proxy will remain until it is removed.

Note: You need to log out and log in again before this takes affect.