

Requisitions

Table of Contents

This Job Aid covers the process of creating, editing, and approving requisitions in the upgraded ONEPeralta system.

Creation and Edits	Page
Log on to ONEPeralta	2
Create a Requisition	5
Run a Budget Check	15
Copy an Existing Requisition	17
Edit and Cancel a Line	21
Cancel a Requisition	25

Approval	Page
Approve or Deny a Requisition	29
Push Back a Requisition	31
Approve a Requisition with an Ad Hoc Approver	33
View Approval History	36

Review Status	Page
View Document Status	41

Log on to ONEPeralta

Sign in

All ONEPeralta Users

1. Enter into your browser > one.peralta.edu
2. Enter > Peralta email **User ID** and **Password**
3. Click > **Sign In**



The screenshot shows the Oracle PeopleSoft login interface. At the top, the Oracle and PeopleSoft logos are displayed. Below the logos, there are two input fields: 'User ID' and 'Password'. A red box highlights these two fields, with a yellow circle containing the number '2' next to it. Below the input fields is a 'Select a Language' dropdown menu with 'English' selected. A green 'Sign In' button is highlighted with a red box, and a yellow circle containing the number '3' is next to it. At the bottom, there is a checkbox for 'Enable Screen Reader Mode' and a link for 'Set Trace Flags'.



Note

Due to periodic system improvements and your evolving role within the system, the screenshots in this training may be different from what you will see when you log in to ONEPeralta.

Log on to ONEPeralta (cont'd)

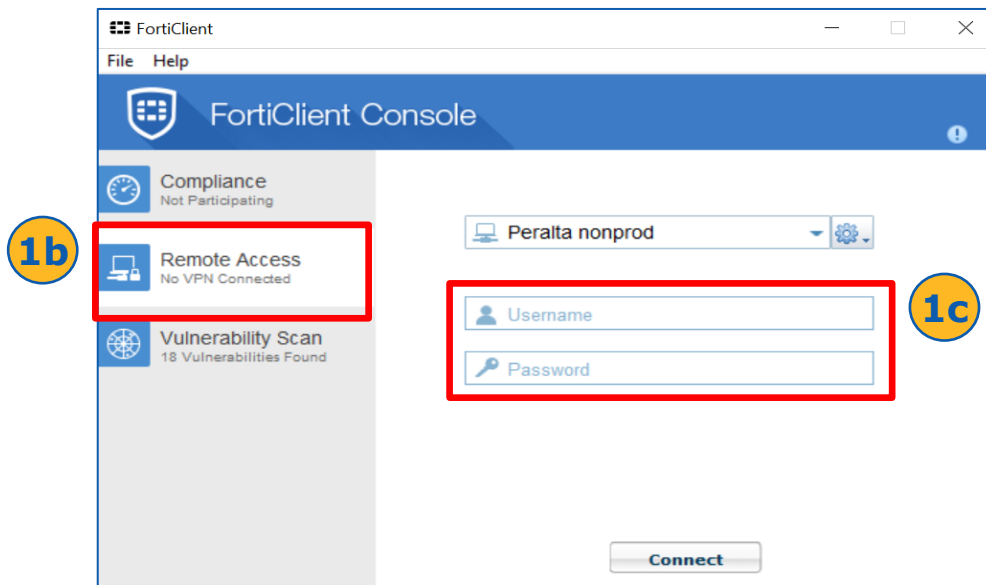
Turn on VPN

All ONEPeralta Users

If you are having trouble logging into ONEPeralta, you may need to connect to Peralta's **Virtual Private Network (VPN)** before you are able to log in to ONEPeralta. Follow the steps below to connect to VPN, then try logging in again.

Turn on VPN using **one of two methods**:

1. Desktop (recommended method)
 - a. Open > **FortiClient**
 - b. Select > **Remote Access**
 - c. Enter > Peralta email **Username** and **Password**



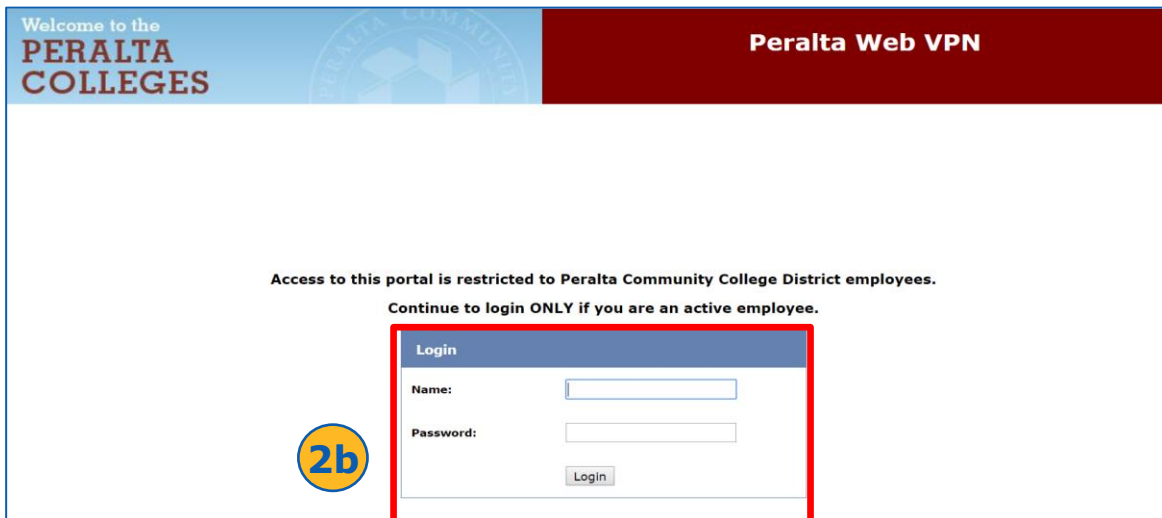
Log on to ONEPeralta (cont'd)

Turn on VPN

All ONEPeralta Users

2. Web / Browser

- a. Enter into your browser > <https://access.peralta.edu/>
- b. Enter > Peralta email **Username** and **Password**



Welcome to the
**PERALTA
COLLEGES**

Peralta Web VPN

Access to this portal is restricted to Peralta Community College District employees.
Continue to login **ONLY** if you are an active employee.

2b

Login

Name:

Password:

Login

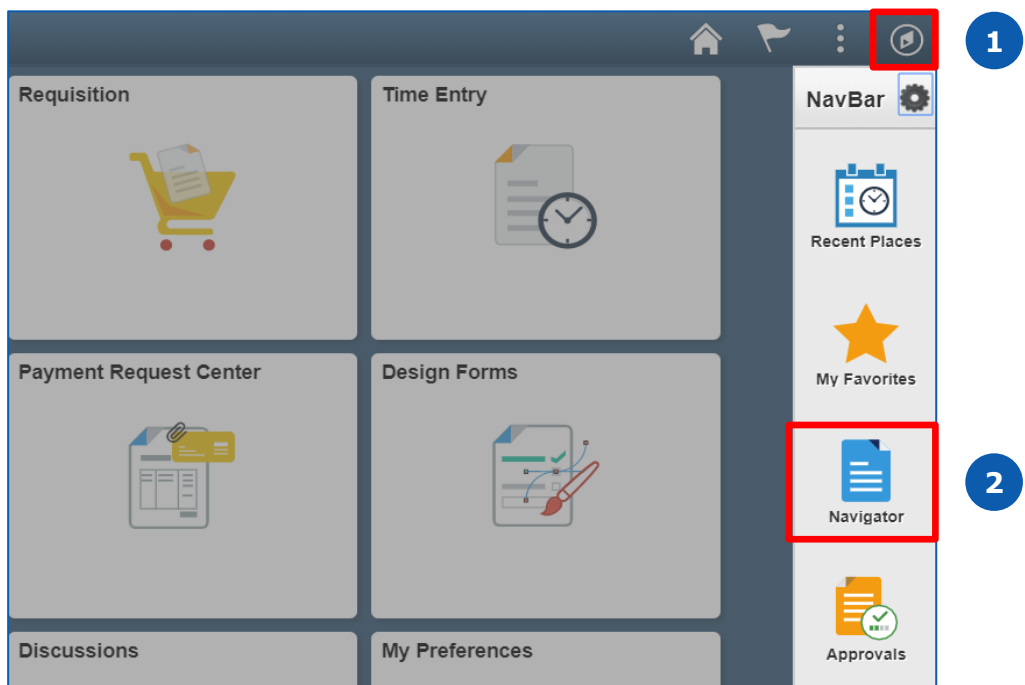
Creation and Edits

Create a Requisition

In the upgraded ONEPeralta system, requisitions are required to be created online before they go through a standardized process of approvals.

All Requesters

1. Click > **NavBar** icon
2. Click > **Navigator**

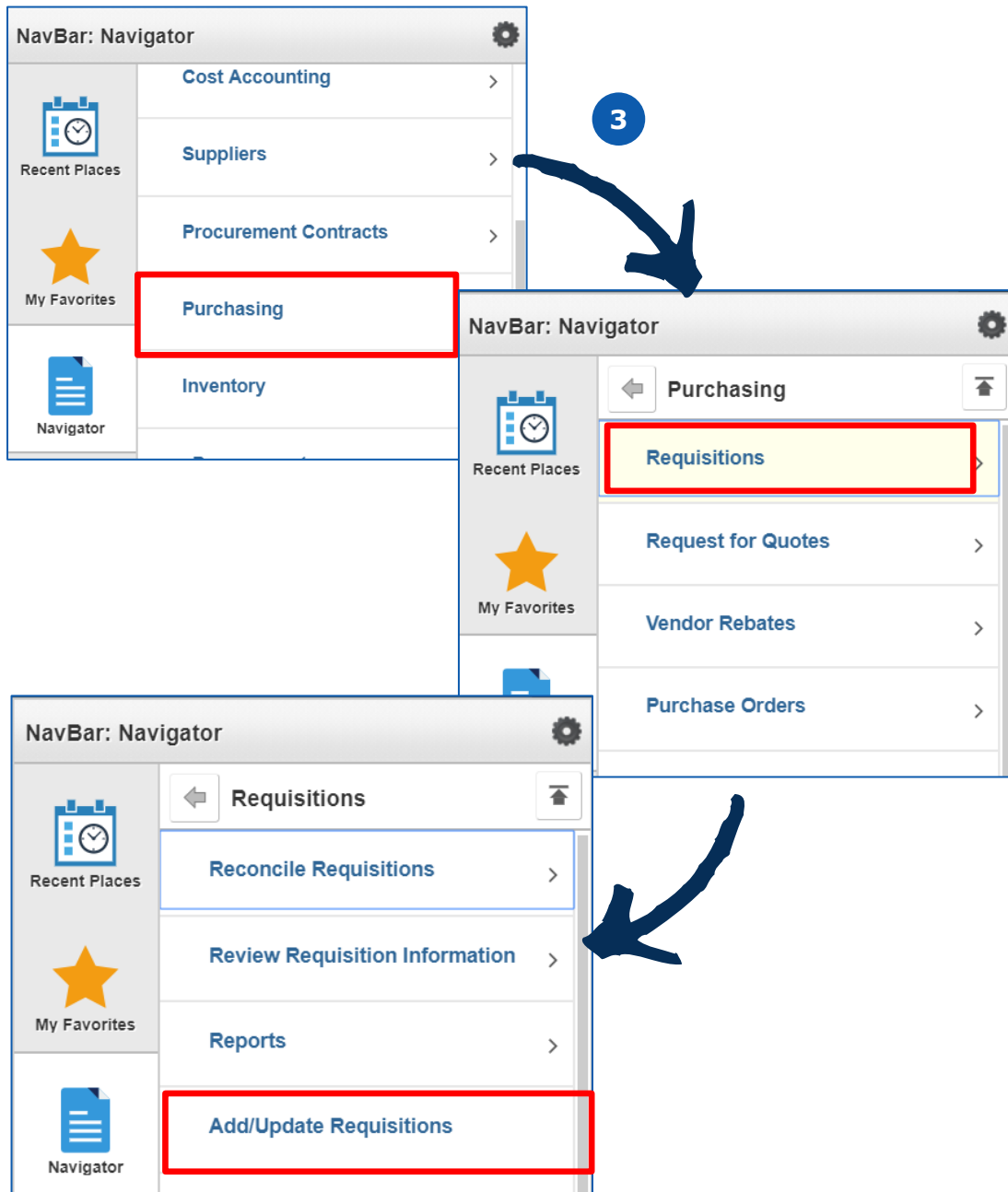


This Job Aid walks you through each process using the NavBar. However, you can also use the **Requester's WorkBench** (NavBar > Navigator > Purchasing > Requisitions > Requester's WorkBench) to set and save search criteria, and to view approval history for requisitions.

Creation and Edits

Create a Requisition (cont'd)

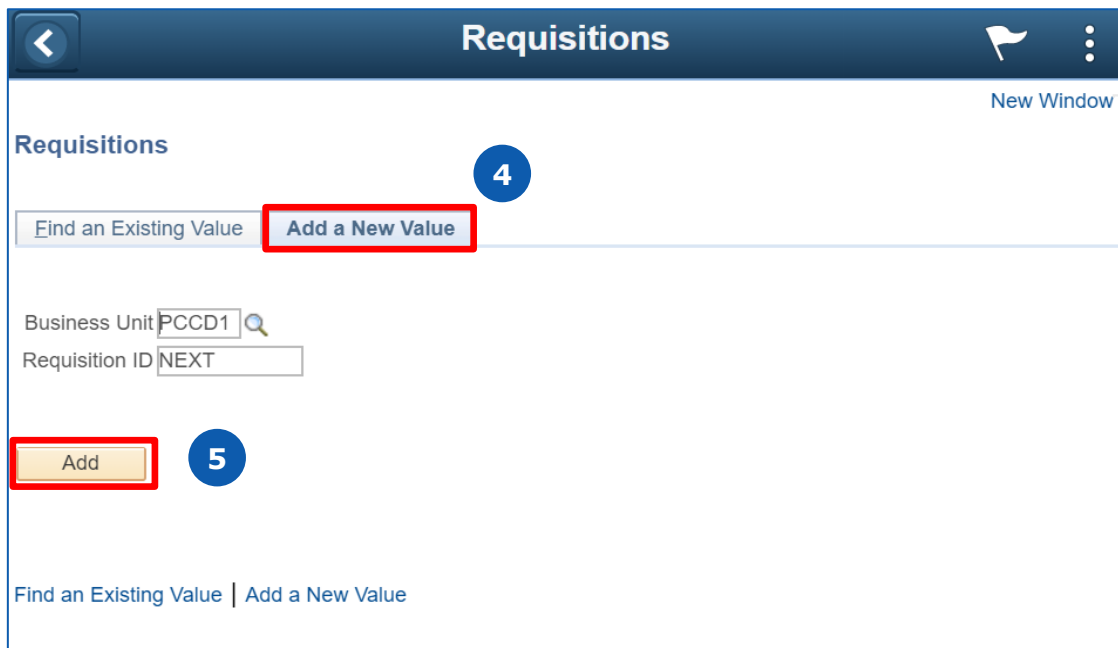
3. Click > **Purchasing** > **Requisitions** > **Add/Update Requisition**



Creation and Edits

Create a Requisition (cont'd)

4. Click > **Add a New Value** tab
5. Click > **Add**



Requisitions

New Window

Requisitions

4

Find an Existing Value Add a New Value

Business Unit PCCD1

Requisition ID NEXT

Add 5

Find an Existing Value | Add a New Value



Do not edit the Business Unit and Requisition ID fields! The ID "NEXT" indicates a new requisition ID will be assigned by the system.

Creation and Edits

Create a Requisition (cont'd)

6. Complete the following fields under the **Header** section
 - a. **Requester**
 - b. **Requisition Date**
 - c. **Origin**
 - d. **Accounting Date***
7. Click > **Requisition Defaults***



The **Accounting Date** field will default to the current date. You will not edit this field unless the requisition is to pay a prior-year expense (back date).



You can also complete **Requisition Defaults**, and then click **Add** on the bottom right of the screen to create a new Requisition with all of the information pre-filled instead of manually completing the page.

Creation and Edits

Create a Requisition (cont'd)

8. Complete all fields under the **Line** section
9. Complete the following fields under the **Schedule** section
 - a. **Ship To Location: Warehouse**
 - b. **Due Date***
 - c. **Attention To:** enter name of person to whom good should be shipped
10. Complete applicable fields under **Details** tab
11. Click **OK**

Requisition Defaults

Requisition ID: NEXT Status: Open

Default Options ?

Default If you select this option, the default values entered on this page are treated as part of the defaulting only applied if no other default values are found for each field. If default values already exist in the hierarchy, only non-blank values are assigned.

Override If you select this option, all default values entered on this page override the default values found in hierarchy, only non-blank values are assigned.

Line

*Buyer: FUNC_2 Unit of Measure: []

Supplier: 0000500002 A-1 STEAM CLEANERS Supplier Location: MAIN

Category: 4302 Supplier Lookup

Schedule

Ship To Location: [] *Taxable: Yes

Due Date: [] Ultimate Use Code: []

Attention To: []

*Distribute By: Quant *Liquidate By: Amou

Ship Via: [] Freight Terms: []

One Time Address

Distribution

SpeedChart: []

Distributions

Details Asset Information []

Dist	Percent	GL Unit	Location	Fund	Cost Ctr	Object Code	Program	Activity Suffix	Project
1		PCCD1	1	01	420	9510	1	672800	0000

OK Cancel Refresh

9

8

10

11



Enter the expected **Ship To** date agreed upon with the supplier, or enter the date requested to be delivered if the former isn't known.

Creation and Edits

Create a Requisition (cont'd)

12. Click > **Mark All** to select all fields
13. Click > **OK**

Retrofit field changes to "all" existing requisition lines/schedules/distributions.....

Business Unit PCCD1 **Requisition Date** 04/24/2018
Requisition ID NEXT **Status** Open

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
 For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
 Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.
 Select 'Apply to All Distrs' to apply changes to all distribution lines on the requisition.

Mark All **Unmark All**

Retrofit Field Selection Personalize | Find | View All | First 1-7 of 17 Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distrs
<input checked="" type="checkbox"/>		Buyer	FUNC_2	
<input checked="" type="checkbox"/>		Supplier	0000500002	
<input checked="" type="checkbox"/>		Category	4302	
<input checked="" type="checkbox"/>		Supplier Location	MAIN	
<input checked="" type="checkbox"/>		Ship To	WAREHOUSE	
<input checked="" type="checkbox"/>	1	Pct	100	
<input checked="" type="checkbox"/>	1	GL Unit	PCCD1	<input type="checkbox"/>

13



You will only see this page if you did entered information into the **Details** tab in the **Maintain Requisitions** page prior to completing **Requisition Defaults**.

Creation and Edits

Create a Requisition (cont'd)

14. Complete applicable fields under **Details** tab if you did not complete them under the Requisitions Defaults tab
 - a. **Description**
 - b. **Quantity**
 - c. **UOM (Unit of Measure)**
 - d. **Category**
 - e. **Price**

Employee Self Service | Add/Update Re...

Maintain Requisitions

Requisition

Business Unit PCCD1 | Status Open

Requisition ID NEXT | Budget Status Not Chk'd

Requisition Name [] Copy From Hold From Further

Header

*Requester FUNC_2 | Requester Info

*Requisition Date 04/24/2018 | District Purchase Order

*Origin DPO | Dollar

*Currency Code USD

Accounting Date 04/24/2018

Requisition Defaults | Add Comments | Amount Summary

Requisition Activities

Amount Summary	
Total Amount	0.00

Add Items From

Purchasing Kit | Catalog

Item Search | Requester Items

Line

Line	Item	Description	Quantity	*UOM	Category	Price
1	[]	Supplies	1.0000	EA	4302	1.00000

View Printable Version | View Approvals | *Go to ...More...

Save | Notify | Refresh



Do not enter anything into the **Item** field under the **Details** tab. Peralta only accepts requisitions by description, not item.

Creation and Edits

Create a Requisition (cont'd)

15. Click > **Add Comments** hyperlink
 - a. Add comments under the **Comments** section
 - b. Click > **Attach** > **Choose File** > **Upload**
16. Check > All checkboxes EXCEPT FOR Approval Justification
17. Click > **OK**
18. Repeat steps 15 through 17 for any additional documents

Employee Self Service | Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit PCCD1 | Status Open | Budget Status Not Chkd

Requisition ID NEXT | Hold From Further Processing

Requisition Name [] Copy From

Header

*Requester [] | Requester Info

*Requisition Date 04/04/2018 | District Purchase Order

Origin DPO | Dollar

*Currency Code USD | Dollar

Accounting Date 04/04/2018

Requisition Defaults | **Add Comments** | Amount Summary

Requisition Activities | Total Amount

Add Items From

In your comments, you can include Requester Name, instructions for delivery, and a description of the attachment.

Header Comments

Business Unit PCCD1 | Requisition Date 04/03/2018 | Status Open

Requisition ID 4000000006

Retrieve Active Comments | Retrieve

*Sort Method Comment Time Stamp | *Sort Sequence Ascending | Sort

Comments | Find | View | First 1 of 1 Last

Use Standard Comments | Comment Status Active | Inactivate +

Send to Supplier | Show at Receipt

Show at Voucher | Approval Justification

Associated Document

Attachment | **Attach** | 15b | Delete | Email

From -> REQ PCCD1-4000000006

17 | OK | Cancel | Refresh



Examples of documents that will need to be attached include quotes for goods or services, contracts, and travel and mileage forms. It is best practice to separate your internal documents from quotes and others that will need to be sent to the vendor.

Creation and Edits

Create a Requisition (cont'd)

19. Click > **Ship To/Due Date** tab
20. Complete the following fields if you did not complete them under the Requisitions Defaults tab
 - a. **Due Date**
 - b. **Ship To**

Employee Self Service **Add/Update Requisitions**

Maintain Requisitions

Requisition

Business Unit PCCD1 Status Open

Requisition ID NEXT Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

Header ?

*Requester Requester Info

*Requisition Date 04/04/2018 District Purchase Order

Origin DPO Dollar

*Currency Code USD

Accounting Date 04/04/2018

Requisition Defaults Add Comments

Requisition Activities

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

Line **19**

Details **Ship To/Due Date** Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line Item Description Due Date Ship To Price

1

View Printable Version *Go to ...More... **20**

Save Notify Refresh Add Update/Display

Creation and Edits

Create a Requisition (cont'd)

21. Click > **Schedule** icon (under **Ship To/Due Date** tab)
22. Verify the information in the Schedule tab
23. Click > **Distribution** icon to enter the correct ChartFields, and to split the requisition across multiple budgets, if necessary
24. Click > **Save**
25. Verify the **Requisition ID** updates from NEXT to an automatically-generated number

Creation and Edits

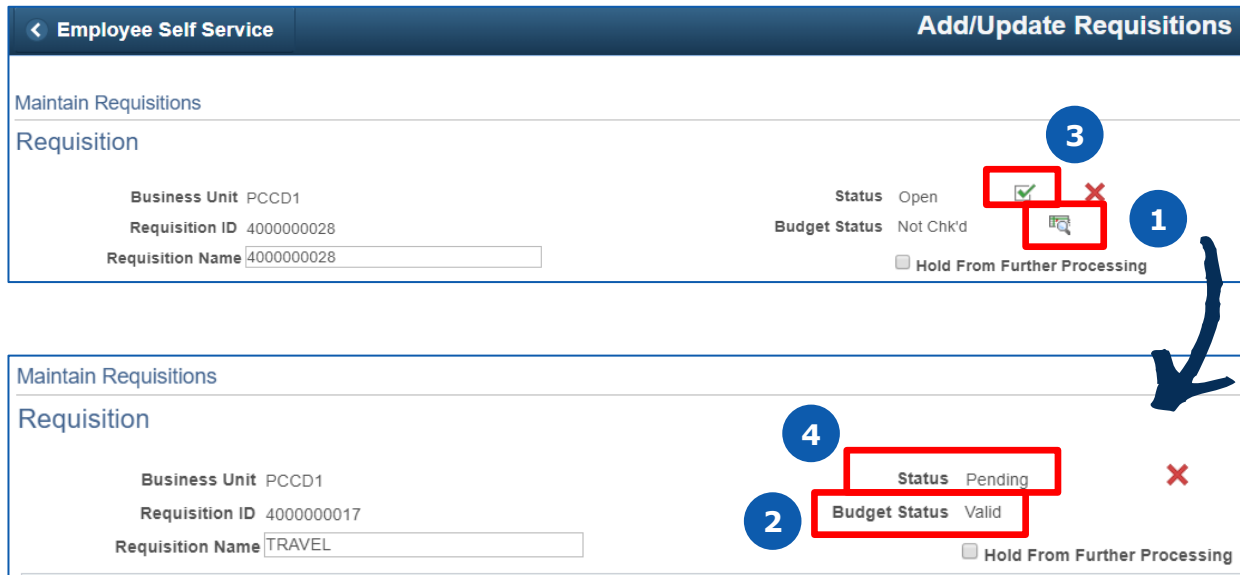
Run a Budget Check

A budget check is run TWICE: the first time is prior to submitting the requisition, and the second time is after submission.

All Requesters

Prior to submission:

1. Click > **Budget Check** icon
2. Confirm **Budget Status** changes from **Not Chk'd** to **Valid**
3. Click > **Green check** icon to submit for approval
4. Confirm **Status** changes from **Open** to **Pending**



The screenshot shows two stages of the 'Add/Update Requisitions' process in the Employee Self Service system. The top screenshot shows a requisition with Business Unit PCCD1, Requisition ID 4000000028, and Requisition Name 4000000028. The Status is 'Open' and Budget Status is 'Not Chk'd'. A green checkmark icon (3) and a magnifying glass icon (1) are highlighted with red boxes. The bottom screenshot shows the same requisition with Requisition Name TRAVEL. The Status is 'Pending' (4) and Budget Status is 'Valid' (2). A red 'X' icon is also visible. A blue arrow points from the top screenshot to the bottom one, indicating the progression of the process.

Creation and Edits

Run a Budget Check (cont'd)

All Requesters

After submission:

5. Click > **Budget Check** icon
6. Confirm **Budget Status** reads **Valid**

< Employee Self Service Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit PCCD1
Requisition ID 4000000028
Requisition Name

Status Pending
Budget Status Not Chk'd 🔍 5 ✕

Hold From Further Processing

< Req Form Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit PCCD1
Requisition ID 4000000028
Requisition Name

Status Pending
Budget Status Valid 6 ✕

Hold From Further Processing

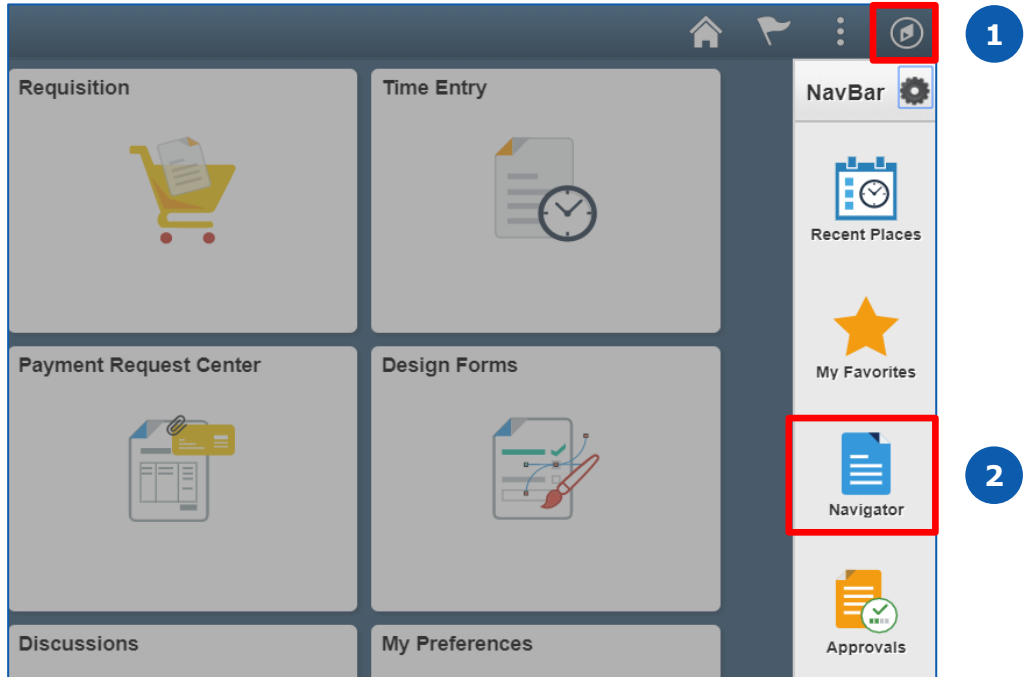
Creation and Edits

Copy an Existing Requisition

The upgraded ONEPeralta system allows you to copy over information from an existing requisition. You can use this feature if you are requesting the same or similar goods.

All Requesters

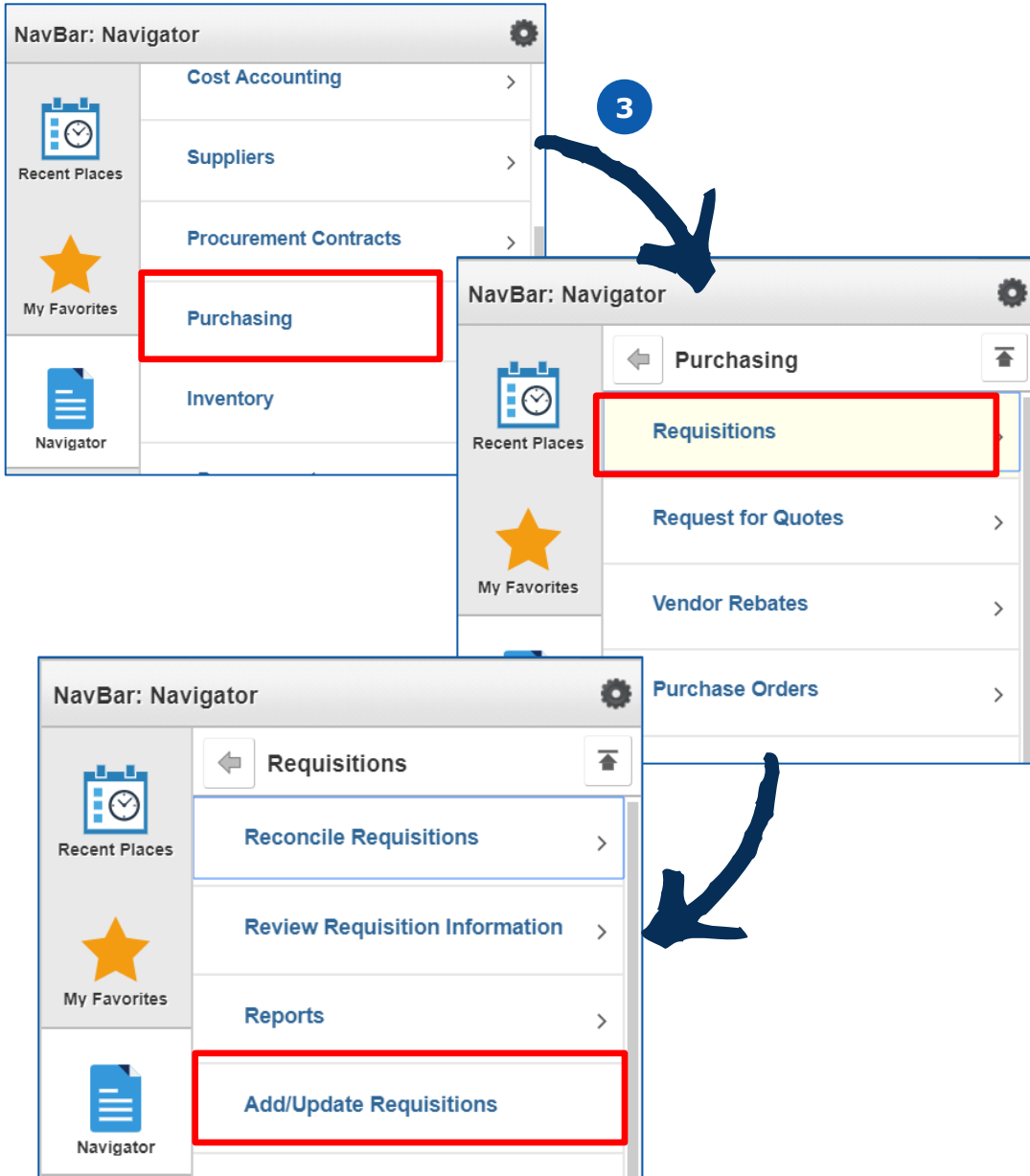
1. Click > **NavBar** icon
2. Click > **Navigator**



Creation and Edits

Copy an Existing Requisition (cont'd)

3. Click > **Purchasing** > **Requisitions** > **Add/Update Requisition**



Creation and Edits

Copy an Existing Requisition (cont'd)

4. Click > **Add a New Value** tab
5. Click > **Add**
6. Click > **Copy From** hyperlink
7. Enter the **Requisition ID** or **Requisition Name** of an existing requisition
8. Click > **OK**

The image illustrates the steps to copy an existing requisition through the system interface. It shows the navigation from the main requisitions screen to the 'Copy From' option and finally to the 'OK' confirmation button.

Creation and Edits

Copy an Existing Requisition (cont'd)

9. Make edits on **Requisitions** page where necessary
10. Click > **Save**
11. Click > **Budget Check** icon
12. Click > **green check** icon
13. Click > **Budget Check** icon

< Req Form
Add/Update Requisitions

Requisition

Business Unit PCCD1 Status Pending ✘
 Requisition ID 4000000028 Budget Status Valid
 Requisition Name 4000000028 Hold From Further Processing

Header ?

*Requester ?
 *Requisition Date ? Requester Info
 *Origin ? District Purchase Order
 *Currency Code Dollar
 Accounting Date ?

[Requisition Defaults](#) [Add Comments](#)
[Requisition Activities](#)
[Document Status](#)

Amount Summary ?

Total Amount	1.00	USD
Tax Amount	0.09	USD
Total Amount	1.09	USD
Pre-Encumbrance	Not Available	USD
Balance		

Add Items From ?

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Select Lines To Display ?

Search for Lines

Line To

Line ?

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	*Ship To Location
1	<input type="text"/>	Supplies ?	1.0000	EA ?	4302 ?	1.00000		1.00 WAREHOUS ?

[View Printable Version](#)
[View Approvals](#)
[*Go to ...More...](#)

10

< Employee Self Service
Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit PCCD1 Status Open ✔ ✘
 Requisition ID 4000000028 Budget Status Not Chk'd ✔ ✘
 Requisition Name 4000000028 Hold From Further Processing

12

11

13

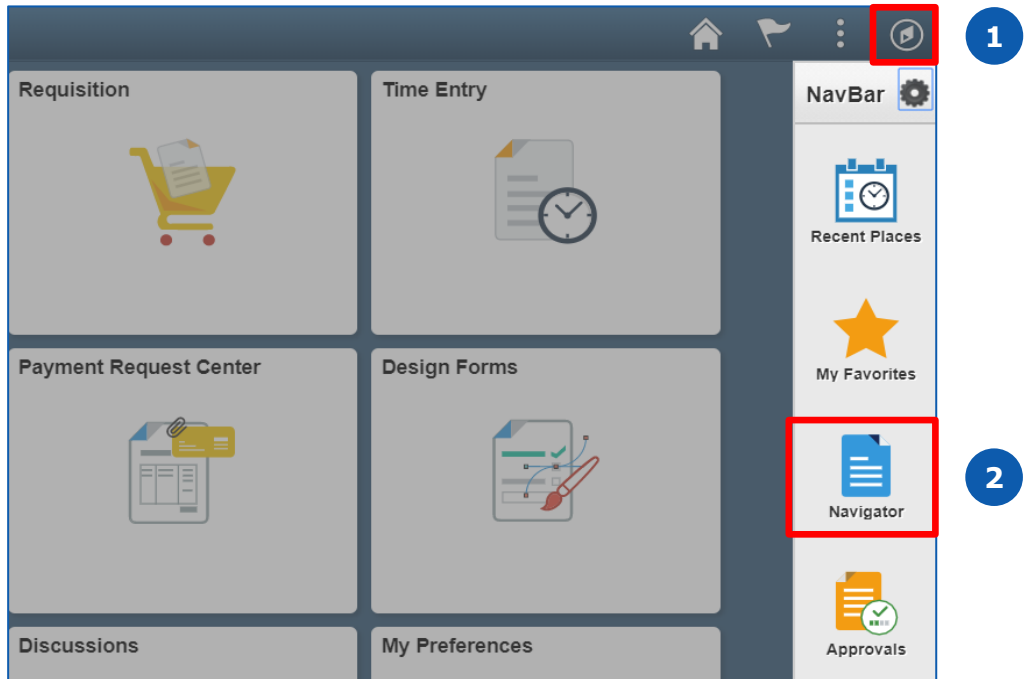
Creation and Edits

Edit and Cancel a Line

You can cancel one or more lines of a requisition without canceling the entire requisition. Edits and cancellations are allowed up until a purchase order has been created for the requisition. However, edited requisitions must start the approval process all over again.

All Requesters

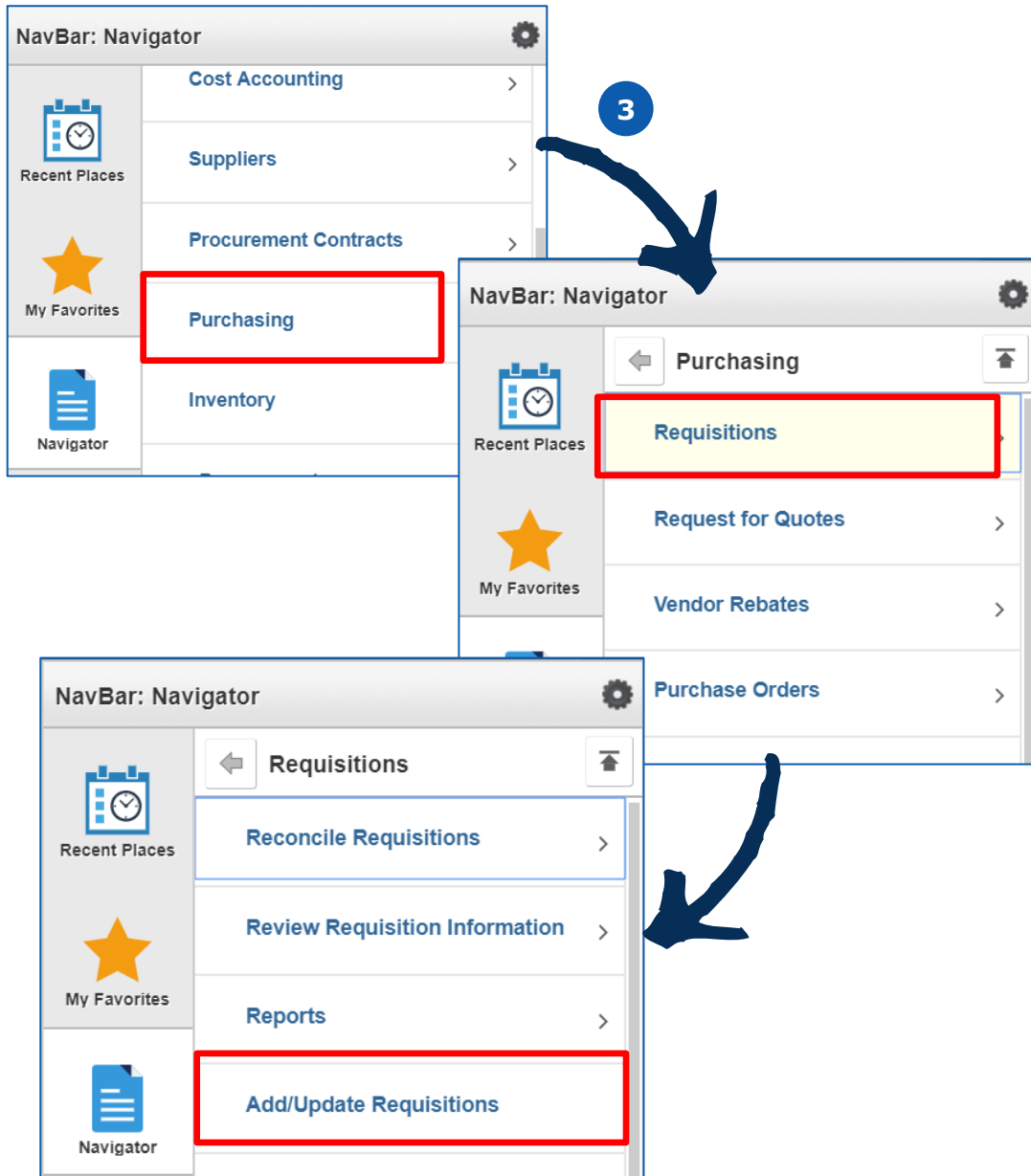
1. Click > **NavBar** icon
2. Click > **Navigator**



Creation and Edits

Edit and Cancel a Line (cont'd)

3. Click > **Purchasing** > **Requisitions** > **Add/Update Requisition**



Creation and Edits

Edit and Cancel a Line (cont'd)

4. Click > **Find an Existing Value** tab
5. Enter **Search Criteria**
6. Click > **Search**
7. Click > **Requisition ID** of desired requisition

< My Homepage
Requisitions

Requisitions

Use the following search to look for an existing Requisition.

4 Find an Existing Value
Add a New Value

▼ Search Criteria

5

Business Unit	=	<input type="text" value="PCCD1"/>	🔍
Requisition ID	begins with	<input type="text"/>	
Requisition Status	=	<input type="text"/>	▼
Origin	begins with	<input type="text"/>	🔍
Requester	begins with	<input type="text"/>	🔍
Requester Name	begins with	<input type="text"/>	🔍
Supplier ID	begins with	<input type="text"/>	

Hold From Further Processing

Case Sensitive

6 Search
Clear
Basic Search
Save Search Criteria

Search Results

Only the first 300 results can be displayed.

[View All](#)

Business Unit	Requisition ID	Requisition Date	Requisition Status	Origin	Requester Name	Supplier ID	Name 1
PCCD1	51103	06/08/2010	Approved	MIN	[REDACTED]	0000727787	WINT HTOO ZIN
PCCD1	4000000028	04/26/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS
PCCD1	4000000027	04/26/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS
PCCD1	4000000026	04/25/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS

7

Creation and Edits

Edit and Cancel a Line (cont'd)

8. Click > **Status** tab
9. Click > **X** next to line to be canceled
10. Click > **Yes**

Employee Self Service
Requisitions

Header

*Requester: BCHRISTIAN
CHRISTIAN, BRANDON
Requester Info

*Requisition Date: 03/30/2018

*Origin: MPO
Merritt Purchase Order

*Currency Code: USD
Dollar

Accounting Date: 03/30/2018

Amount Summary

Total Amount	2,191.29	USD
Tax Amount	202.70	USD
Total Amount	2393.99	USD
Pre-Encumbrance Balance	Not Available	USD

Add Items From

Purchasing Kit
Item Search

Catalog
Requester Items

Select Lines To Display

Search for Lines

Line To Retrieve

Line

Personalize | Find | View All | First | 1-4 of 4 | Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls
Line	Item	Description	Status				
1	<input type="text"/>	Item No.: 223866 -	Pending				X + -
2	<input type="text"/>	Item No.: 2396067 -	Pending				X + -
3	<input type="text"/>	Item No.: 455731 -	Pending				X + -
4	<input type="text"/>	Item No.: 473138 -	Pending				X + -

View Printable Version *Go to ...More...

Save
Return to Search
Previous in List
Next in List
Notify
Refresh
Add



Message

Canceling a line will also cancel its schedule(s) and distribution(s), Proceed? (10100,136)

After a Line is Canceled and the Requisition is saved, the Line cannot be changed again.

Yes
No

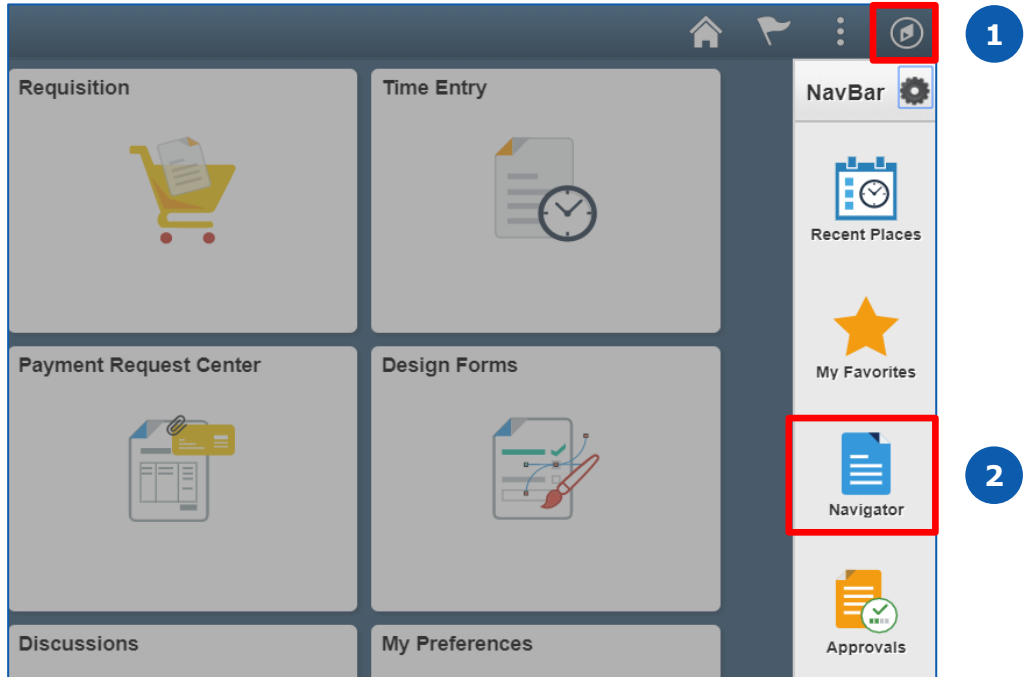
Creation and Edits

Cancel a Requisition

In the event that you need to cancel a requisition entirely, follow the steps below.

All Requesters

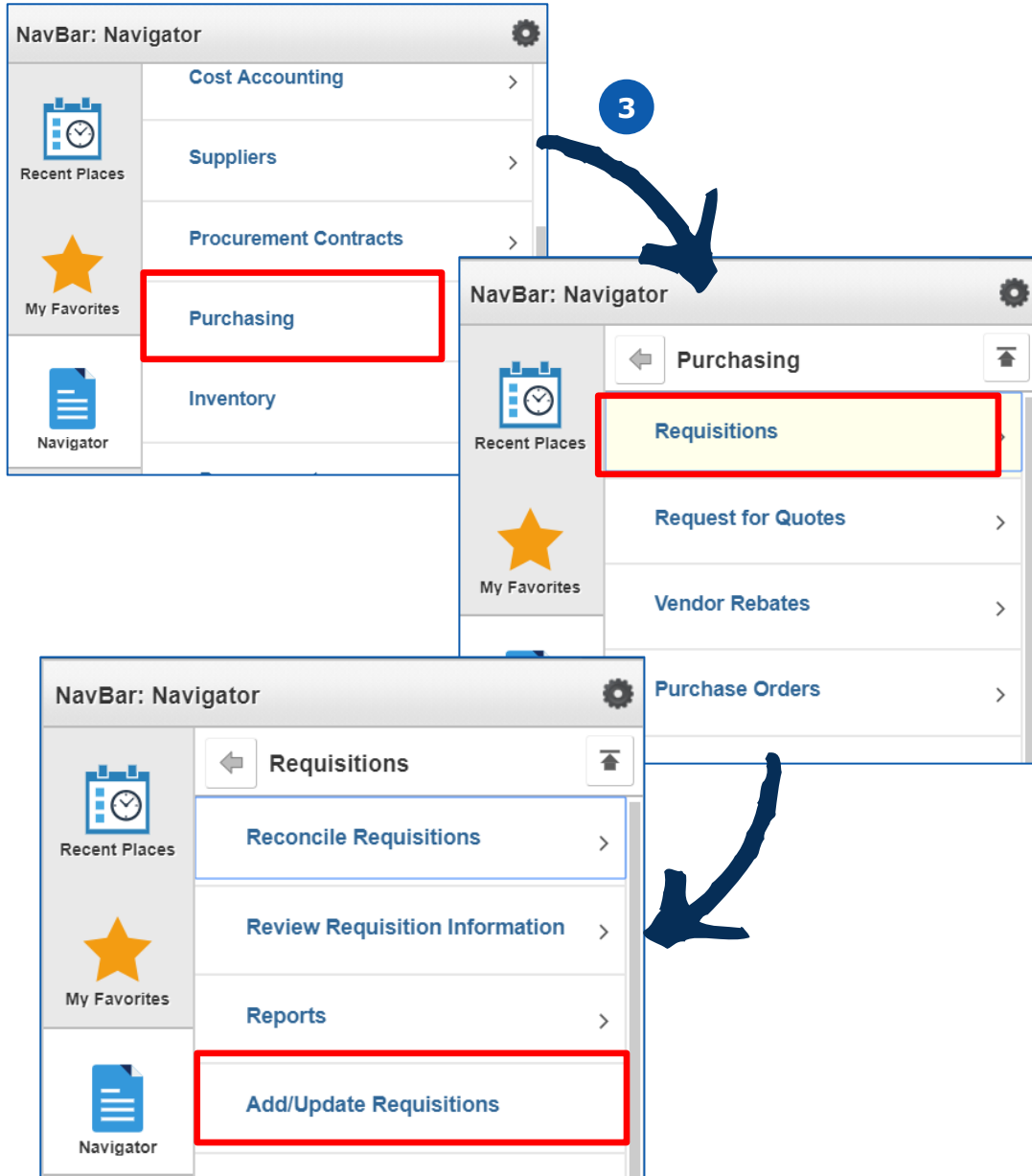
1. Click > **NavBar** icon
2. Click > **Navigator**



Creation and Edits

Cancel a Requisition (cont'd)

3. Click > **Purchasing** > **Requisitions** > **Add/Update Requisition**



Creation and Edits

Cancel a Requisition (cont'd)

4. Click > **Find an Existing Value** tab
5. Enter **Search Criteria**
6. Click > **Search**
7. Click > **Requisition ID** of desired requisition

< My Homepage
Requisitions

Requisitions

Use the following search to look for an existing Requisition.

4 Find an Existing Value
Add a New Value

Search Criteria

5

Business Unit = PCCD1 🔍

Requisition ID begins with

Requisition Status = ▼

Origin begins with 🔍

Requester begins with 🔍

Requester Name begins with 🔍

Supplier ID begins with

Hold From Further Processing

Case Sensitive

6 Search
Clear
Basic Search 🔍
Save Search Criteria

Search Results

Only the first 300 results can be displayed.

[View All](#)

Business Unit	Requisition ID	Requisition Date	Requisition Status	Origin	Requester Name	Supplier ID	Name 1
PCCD1	51103	06/08/2010	Approved	MIN	[REDACTED]	0000727787	WINT HTOO ZIN
PCCD1	4000000028	04/26/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS
PCCD1	4000000027	04/26/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS
PCCD1	4000000026	04/25/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS

Creation and Edits

Cancel a Requisition (cont'd)

8. Click > **X** in the header
9. Click > **OK**
10. Click > **Budget Check** icon to release the pre-encumbrance

Employee Self Service
Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit PCCD1

Requisition ID 4000000019

Requisition Name 4000000019

Status Approved

Budget Status Not Chk'd

Hold From Further Processing

8
X
B
10

Header ?

*Requester [Redacted] [Redacted]

*Requisition Date 04/12/2018 [Calendar Icon] [Requester Info](#)

*Origin AIN [Search Icon] Alameda Invoice

Currency Code USD Dollar

Accounting Date 04/12/2018 [Calendar Icon]

[Amount Summary](#) ?

Total Amount	1.41	USD
Tax Amount	0.13	USD
Total Amount	1.54	USD

Message

Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)

When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

Yes
No

9

Approval

Approve or Deny a Requisition

Approvals will follow the following WorkFlow:

District

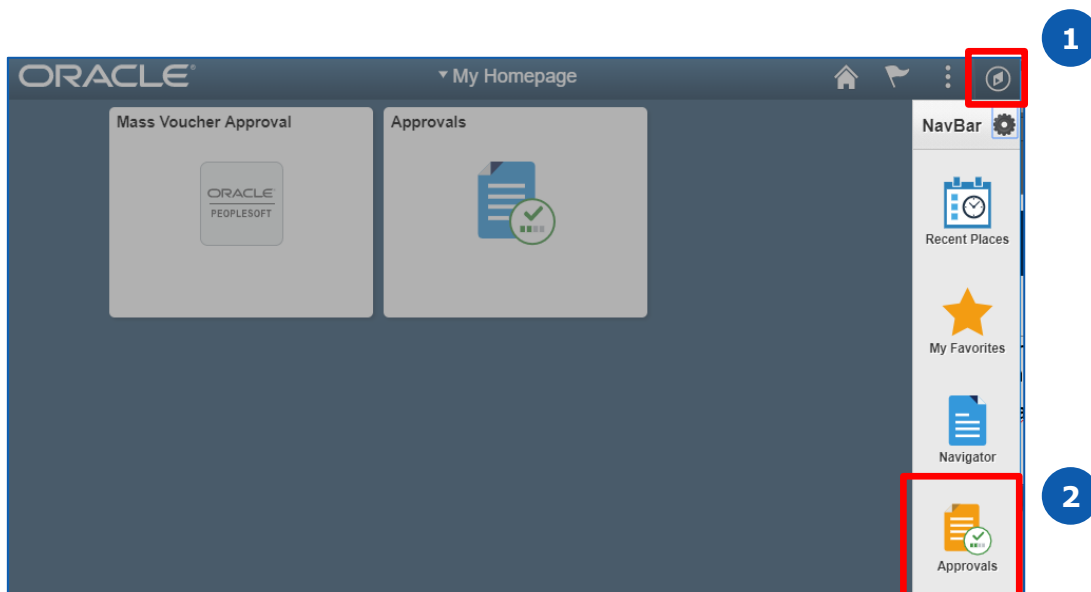
Level 1: **Department Manager**
Level 2: **Vice Chancellor or Director**
Level 3: **Vice Chancellor or Director**
Ad Hoc: **Ad Hoc Approvers** (if any)

Campus

Level 1: **Department Manager**
Level 2: **Business Office Staff**
Level 3: **Campus Business Manager**
Ad Hoc: **Ad Hoc Approvers** (if any)

All Approvers

1. Click > **NavBar** icon
2. Click > **Approvals**



This Job Aid will walk you through approvals using the NavBar. However, you are encouraged to use the tiles on the home screen once you become more comfortable with the system.

Approval

Approve or Deny a Requisition (cont'd)

3. Select > **View Detail** for the requisition to approve
4. Select > **Approve** or **Deny**
5. Enter > **Comments**
6. Click > **Submit**

Pending Approvals

Sort: Type

Navigation List: All Approvals (96), Budget Journal (4), Journal Entry (17), **Requisition (5)**, Voucher (70)

Buttons: Approve, Deny, Pushback

Requisition Approvals Summary (5 rows)

Select	Transaction Type	Description	Transaction Information	Status	Routed	3 View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012440 [REDACTED]	641.40 USD	Medium Priority	05/31/2018	3 View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012429 [REDACTED]	75,898.29 USD	Medium Priority	05/31/2018	View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012440 [REDACTED]	5,047.00 USD	Medium Priority	05/31/2018	View Detail
<input type="checkbox"/>	Requisition	Smart Classroom - SecureAll - PCCD1 / 2000124432 [REDACTED]	17,000.00 USD	Medium Priority	06/01/2018	View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 2000124389 [REDACTED]	15,303.40 USD	Medium Priority	06/01/2018	View Detail

Approver Comments: [Text Area]

Pending Approvals | **Requisition**

Request for PCCD1/2000124403
641.40 USD

Header is pending your approval

Buttons: Approve, Deny, Pushback (4)

Summary

Business Unit: PCCD1 | Requisition ID: 2000124403
 Routed Date: May 29, 2018 | Requisition Date: May 29, 2018
 Requester: [REDACTED] | Entered by: [REDACTED]
 Budget Header Status: Valid

More Information

Header comments and attachments: [Link]

Lines (1 row)

Line Number	Item Description	Merchandise Amount	View Detail
1	BCC Securatis Invoice	641.40 USD	View Detail

Approver Comments: [Text Area]

Approval Chain: [Link]

Buttons: Cancel, Approve, **Submit** (6)

You are about to approve this request.

Approver Comments: [Text Area] (5)

Buttons: Cancel, Deny, **Submit** (6)

You are about to deny this request.

Approver Comments: [Text Area] (5)

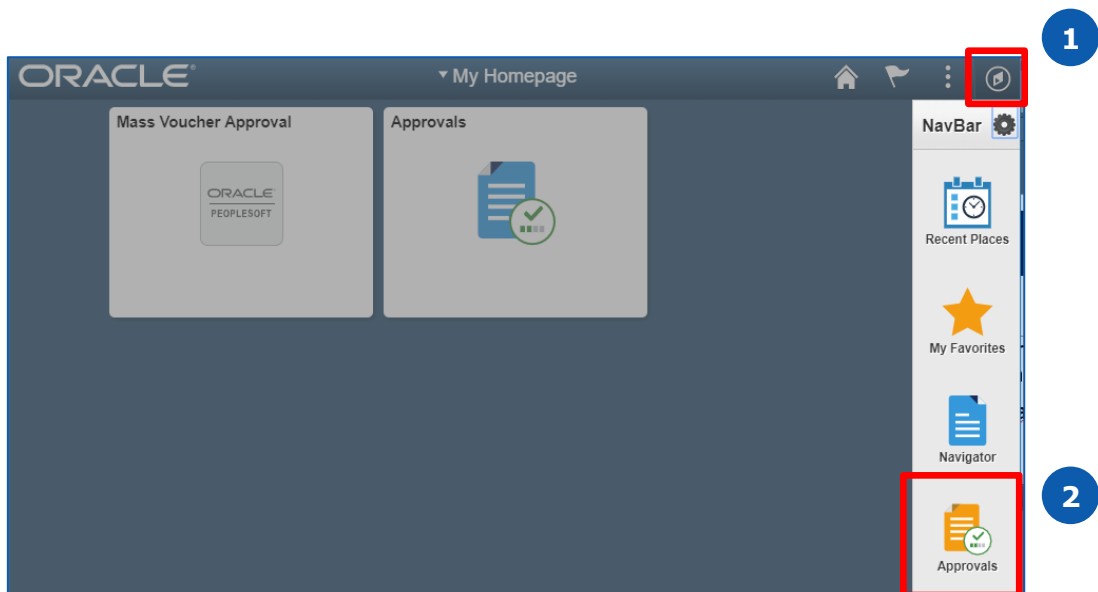
Approval

Push Back a Requisition

When minor updates are required, Levels 2 and 3 approvers are able to push back a requisition to the previous approver for edits without denying it altogether.

All Approvers

1. Click > **NavBar** icon
2. Click > **Approvals**



Approval

Push Back a Requisition (cont'd)

3. Select > **View Detail** for the requisition to push back
4. Select > **Pushback**
5. Enter > **Comments**
6. Click > **Submit**

Pending Approvals

Navigation List: All Approvals (96), Budget Journal (4), Journal Entry (17), **Requisition (5)**, Voucher (70)

Buttons: Approve, Deny, Pushback

Requisition Approvals Summary (5 rows)

Select	Transaction Type	Description	Transaction Information	Status	Routed	View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012440	641.40 USD	Medium Priority	05/31/2018	3 View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012429	75,898.29 USD	Medium Priority	05/31/2018	View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012444	5,047.00 USD	Medium Priority	05/31/2018	View Detail
<input type="checkbox"/>	Requisition	Smart Classroom - SecureAll - PCCD1 / 2000124432	17,000.00 USD	Medium Priority	06/01/2018	View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 2000124389	15,303.40 USD	Medium Priority	06/01/2018	View Detail

Approver Comments

Pending Approvals | **Requisition**

Request for PCCD1/2000124403
641.40 USD

Buttons: Approve, Deny, **4** Pushback

Header is pending your approval

Summary

Business Unit: PCCD1 | Requisition ID: 2000124403
 Routed Date: May 29, 2018 | Requisition Date: May 29, 2018
 Requester: [Redacted] | Entered by: [Redacted]
 Budget Header Status: Valid

More Information: Header comments and attachments

Lines (1 row)

Line Number	Item Description	Merchandise Amount	View Detail
1	BCC Securatis Invoice	641.40 USD	View Detail

Approver Comments

Approval Chain

Pushback

Buttons: Cancel, **6** Submit

You are about to pushback this request.

5 Approver Comments

[Redacted Comment Box]

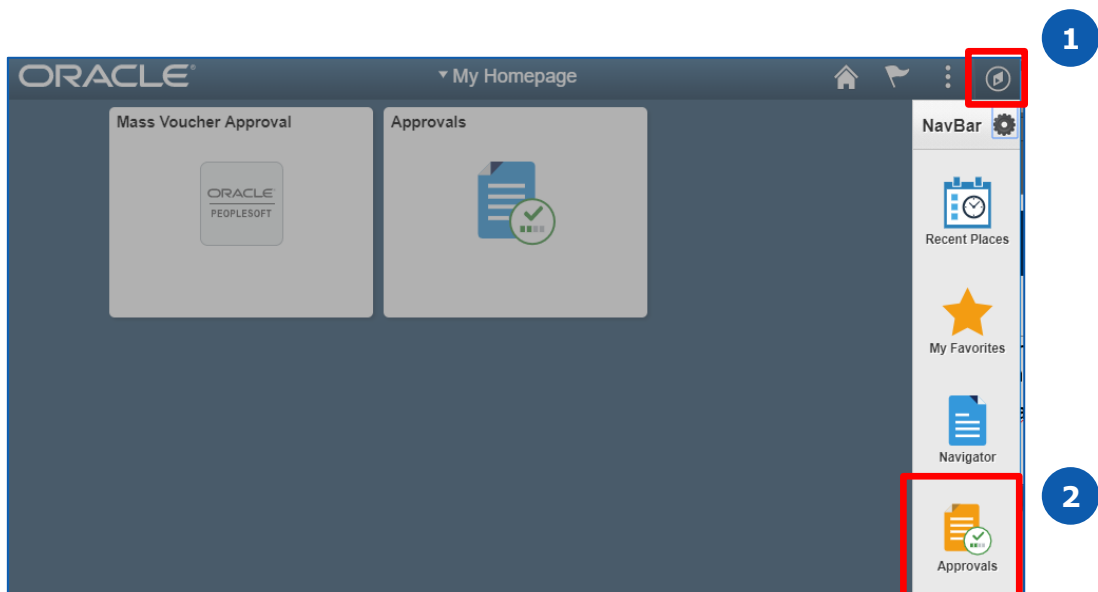
Approval

Approve a Requisition with an Ad Hoc Approver

Some requisitions will require one or more Ad Hoc Approvers. Levels 1, 2, and 3 approvers are able to add Ad Hoc Approvers as necessary as they perform the approval process.

All Approvers

1. Click > **NavBar** icon
2. Click > **Approvals**



Approval

Approve a Requisition with an Ad Hoc Approver (cont'd)

3. Select > **View Detail** for the requisition that require an ad hoc approver
4. Click > **Approval Chain**

Pending Approvals

Sort: Type

Navigation List: All Approvals (96), Budget Journal (4), Journal Entry (17), **Requisition (5)**, Voucher (70)

Buttons: Approve, Deny, Pushback

Requisition Approvals Summary (5 rows)

Select	Transaction Type	Description	Transaction Information	Status	Routed	View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012440 [REDACTED]	641.40 USD	Medium Priority	05/31/2018	3 View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012429 [REDACTED]	75,898.29 USD	Medium Priority	05/31/2018	View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 200012444 [REDACTED]	5,047.00 USD	Medium Priority	05/31/2018	View Detail
<input type="checkbox"/>	Requisition	Smart Classroom - SecureAll - PCCD1 / 2000124432 [REDACTED]	17,000.00 USD	Medium Priority	06/01/2018	View Detail
<input type="checkbox"/>	Requisition	PCCD1 / 2000124389 [REDACTED]	15,303.40 USD	Medium Priority	06/01/2018	View Detail

Approver Comments

Pending Approvals

Requisition

Request for PCCD1/2000124403
641.40 USD

Buttons: Approve, Deny, Pushback

Header is pending your approval

Summary

Business Unit	PCCD1	Requisition ID	2000124403
Routed Date	May 29, 2018	Requisition Date	May 29, 2018
Requester	Louie Martirez [REDACTED]	Entered by	Louie [REDACTED]
		Budget Header Status	Valid

More Information

Header comments and attachments >

Lines (1 row)

Line Number	Item Description	Merchandise Amount	View Detail
1	BCC Securatis Invoice	641.40 USD	View Detail

Approver Comments

4 Approval Chain >

Approval

Approve a Requisition with an Ad Hoc Approver (cont'd)

5. Click > **+** next to your name
6. Enter > **User ID** of Ad Hoc Approver
7. Click > **Insert**

Approval Chain [x]

District Approvals

▼ Requisition 4000000027 Pending

Start New Path

District Requisitions

Pending	+
██████████ Cost Center Manager	>
Not Routed	+
Multiple Approvers Vice Chancellor/Associate VC	>
Not Routed	+
Multiple Approvers Vice Chancellor/Associate VC	>

Start new approval path [x]

User ID [Q] **6**

Approver
 Reviewer

Insert **7**

4

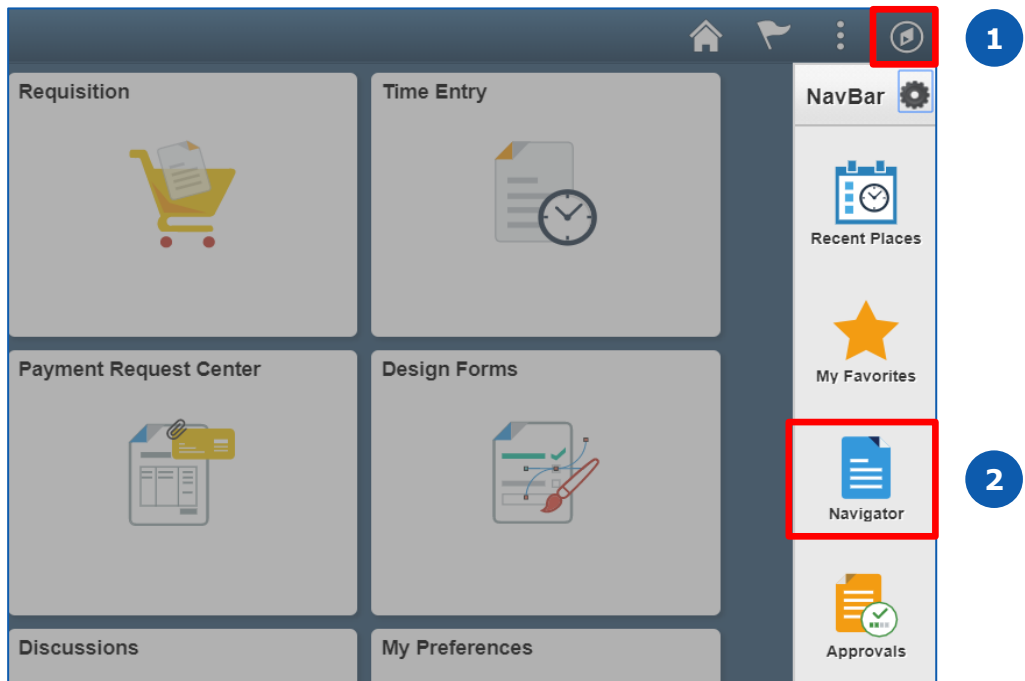
Approval

View Approval History

Requesters are able to view the approval history of a requisition at any time, including each level of approvers and who is responsible for the next approval.

All Requesters

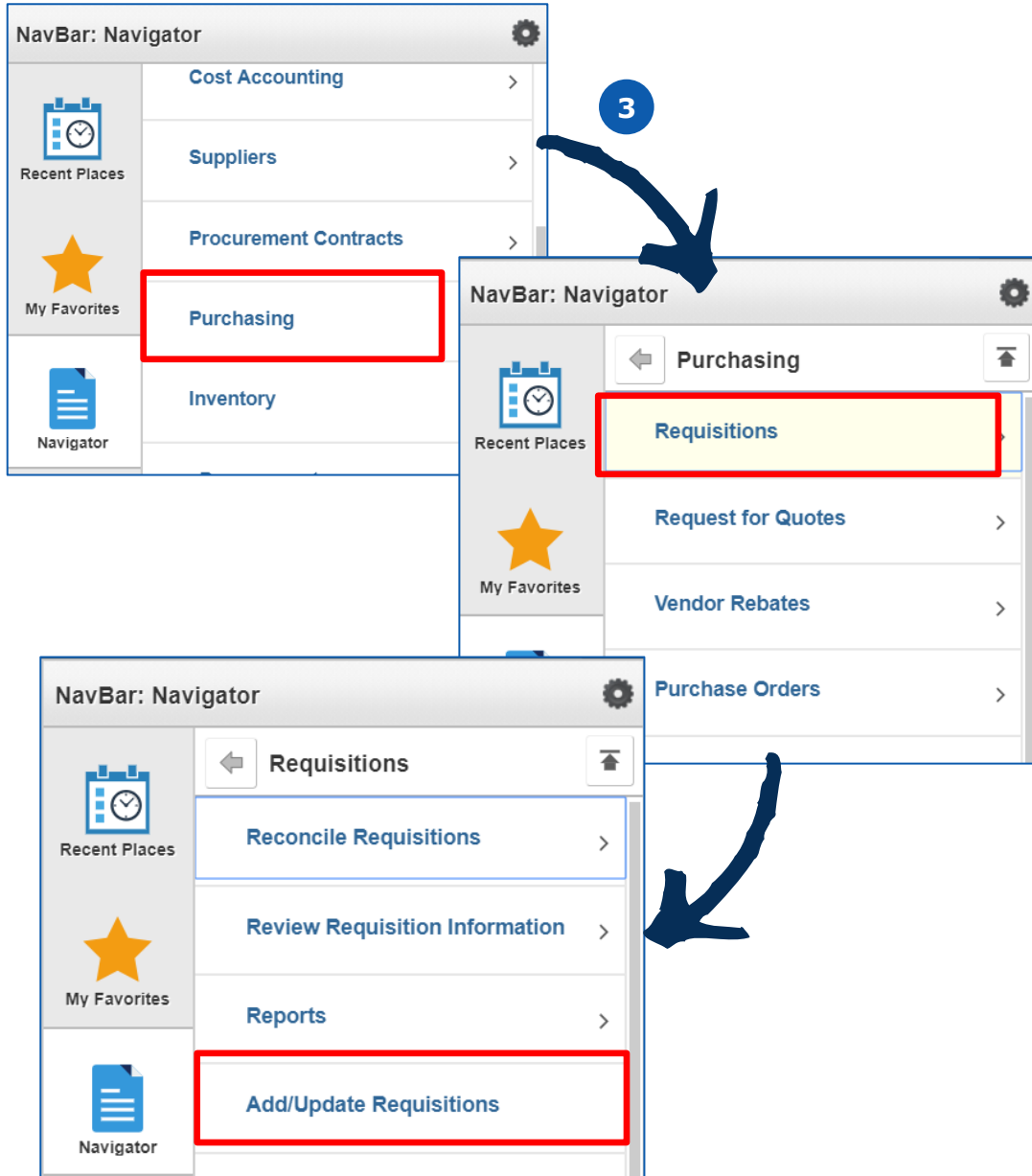
1. Click > **NavBar** icon
2. Click > **Navigator**



Approval

View Approval History (cont'd)

3. Click > **Purchasing** > **Requisitions** > **Add/Update Requisition**



Approval

View Approval History (cont'd)

4. Click > **Find an Existing Value** tab
5. Enter **Search Criteria**
6. Click > **Search**
7. Click > **Requisition ID** of desired requisition

< My Homepage
Requisitions

Requisitions

Use the following search to look for an existing Requisition.

4
Find an Existing Value
Add a New Value

▼ Search Criteria

5

Business Unit	=	<input type="text" value="PCCD1"/>	🔍
Requisition ID	begins with	<input type="text"/>	
Requisition Status	=	<input type="text"/>	▼
Origin	begins with	<input type="text"/>	🔍
Requester	begins with	<input type="text"/>	🔍
Requester Name	begins with	<input type="text"/>	🔍
Supplier ID	begins with	<input type="text"/>	

Hold From Further Processing

Case Sensitive

6
Search
Clear
Basic Search
Save Search Criteria

Search Results

Only the first 300 results can be displayed.

View All

Business Unit	Requisition ID	Requisition Date	Requisition Status	Origin	Requester Name	Supplier ID	Name 1
PCCD1	51103	06/08/2010	Approved	MIN	[REDACTED]	0000727787	WINT HTOO ZIN
PCCD1	4000000028	04/26/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS
PCCD1	4000000027	04/26/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS
PCCD1	4000000026	04/25/2018	Pending	DPO	(blank)	0000500002	A-1 STEAM CLEANERS

7

Approval

View Approval History (cont'd)

8. Click > **View Approvals***

Requisitions

[New Window](#) | [Personalize Page](#)

Maintain Requisitions

Requisition

Business Unit PCCD1

Requisition ID 2000123744

Requisition Name

Status Pending ✗

Budget Status Valid

Hold From Further Processing

Header ?

*Requester Requester Info

*Requisition Date Requester Info

*Origin District Open Account

*Currency Code Dollar

Accounting Date Requester Info

[Requisition Defaults](#)

[Requisition Activities](#)

[Document Status](#)

[Add Comments](#)

Amount Summary

Total Amount	20.00	USD
Tax Amount	1.85	USD
Total Amount	21.85	USD
Pre-Encumbrance Balance	Not Available	USD

Add Items From ?

[Purchasing Kit](#)

[Item Search](#)

Select Lines To Display ?

[Search for Lines](#)

Line To Retrieve

Line ?

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls		
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	*Ship To Location	
1	<input type="text"/>	test	1.0000	EA	5105	20.00000	20.00	WAREHO	

[View Printable Version](#) 8 View Approvals *Go to ...More...

Save
 Return to Search
 Previous in List
 Next in List
 Notify
 Refresh



The View Approvals link will only appear for requisitions created in ONEPeralta. All requisitions originating from PROMT will not have this link available.

Approval

View Approval History (cont'd)

9. The pop-up window displays all required approver levels, and indicates the status of the approval

The screenshot shows a 'View Approvals' window with the following details:

- Business Unit: PCCD1
- Requisition ID: 2000123744
- Requisition Name: 2000123744
- Requested For: [Redacted]
- Status: Pending
- Budget Status: Valid
- Number of Lines: 1
- Total Amount: 20.00 USD

District Approvals

Requisition 2000123744: Pending

District Requisitions

9 Pending [Redacted] Cost Center Manager → Not Routed Multiple Approvers PCC VC or Associate VC Level 2 → Not Routed [Redacted] PCC Req VC or Asso VC Level 3

Buttons: View/Hide Comments, Start New Path, Apply Approval Changes, Return

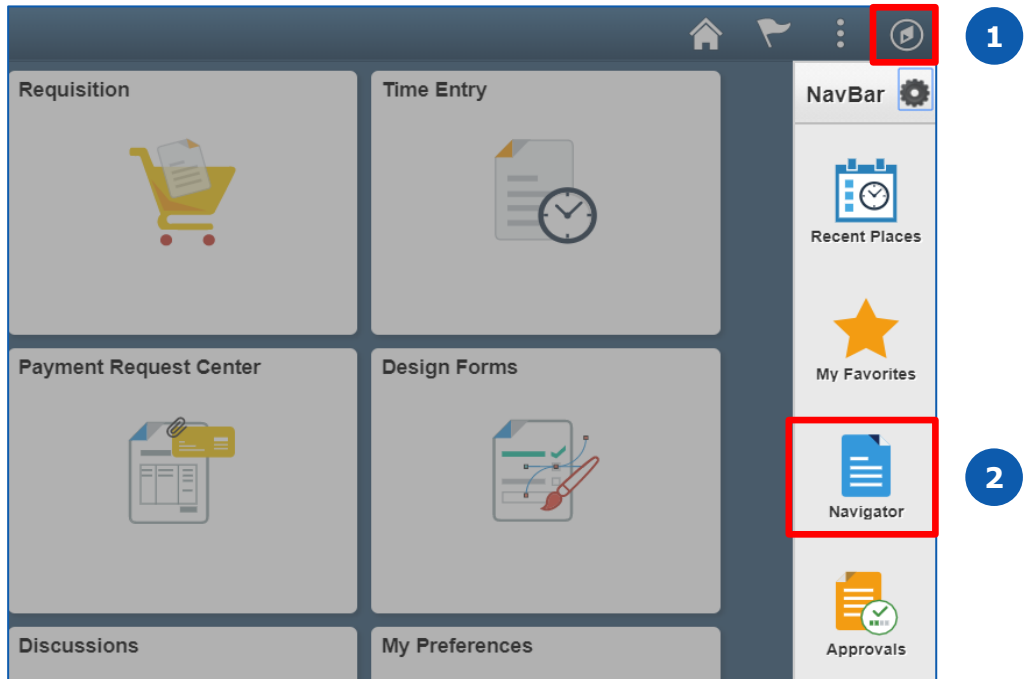
Review Status

View Document Status

Requesters are able to view the status of the requisition at any time. ONEPeralta provides a visual tracker of the progress, from requisition to purchase order to payment.

All Requesters

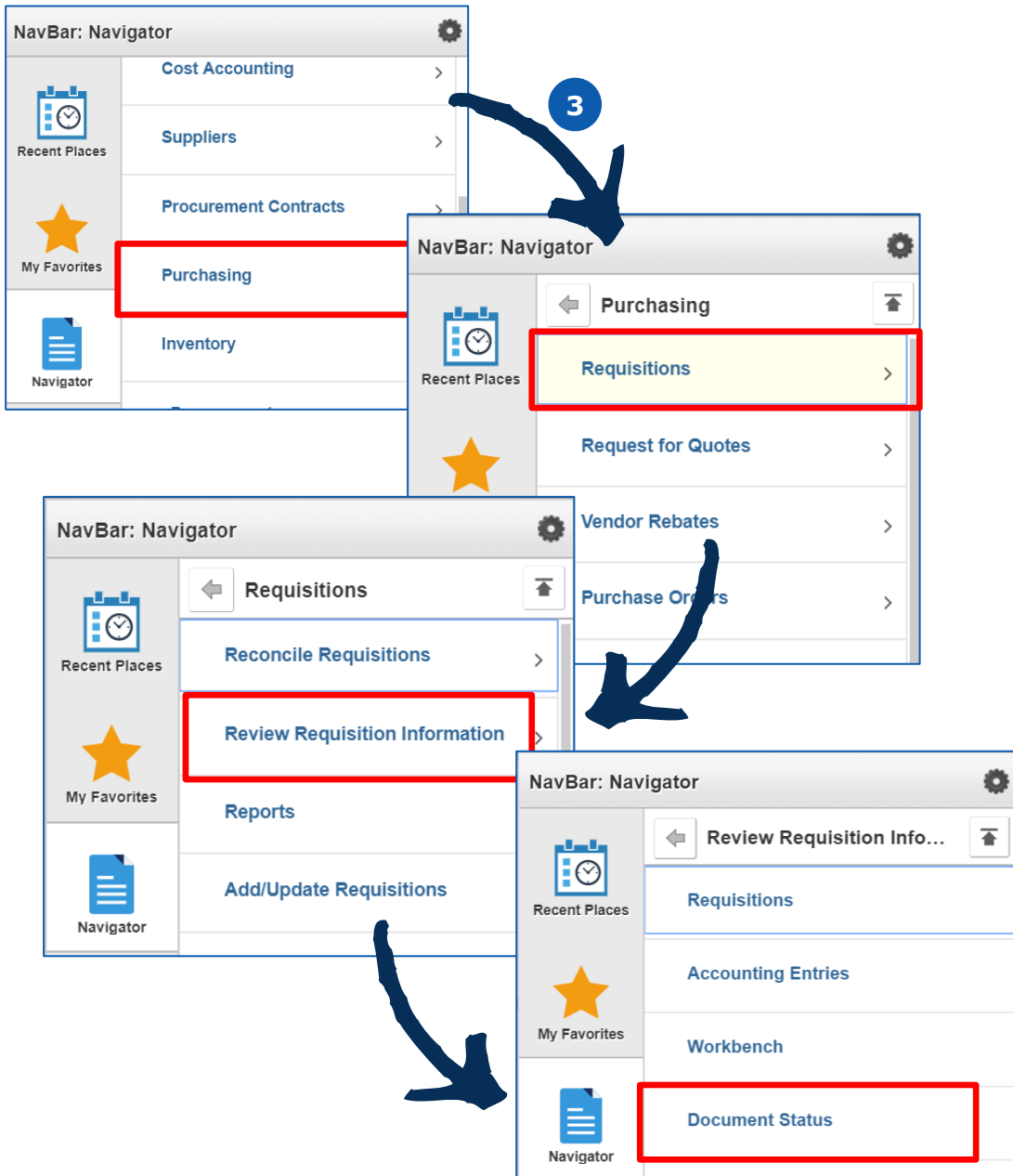
1. Click > **NavBar** icon
2. Click > **Navigator**



Review Status

View Document Status (cont'd)

3. Click > **Purchasing** > **Requisitions** > **Review Requisition Information** > **Document Status**



Review Status

View Document Status (cont'd)

4. Enter **Search Criteria**
5. Click > **Search**
6. Click > **Requisition ID** to view approval history

Requisition Document Status

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

Business Unit = PCCD1

Requisition ID begins with

Requisition Status = Approved

Requisition Date =

Origin begins with

Requester begins with

Description begins with

Search Clear Basic Search Save Search Criteria

Search Results

Only the first 300 results can be displayed.

View All 1-100 of 300

Business Unit	Requisition ID	Requisition Status	Requisition Date	Origin	Requester	Description
PCCD1	COMPUTER	Approved	09/22/2011	APO		
PCCD1	95387	Approved	08/24/2015	DIN		

Review Status

View Document Status (cont'd)

7. A visual tracker depicts the status of the requisition
8. Review the table for more detailed information about the status
9. Click > **Grid Action Menu** icon to personalize the table (hide columns, zoom), or to download to an Excel file for printing

Requisition Document Status

Business Unit: PCCD1
 Document Date: 10/13/2016
 Currency: USD
 Requester: XXXXXXXXXX

Req ID: [200107153](#)
 Status: Approved
 Document Type: Requisition
 Merchandise Amt: 1,283.61
 Budget Status: Valid

7

Associated Document

9

1-4 of 8
▶▶
◀◀
View All

Documents	Related Info	▶							
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	
▼Actions		PCCD1	Purchase Order	3000098580	Dispatched	10/17/2016	0000504505	MAIN	
▼Actions		PCCD1	Receipt	4000032720	Received	10/20/2016	0000504505	MAIN	
▼Actions		PCCD1	Receipt	4000032786	Received	10/26/2016	0000504505	MAIN	
▼Actions		PCCD1	Receipt	4000032798	Received	10/27/2016	0000504505	MAIN	

8