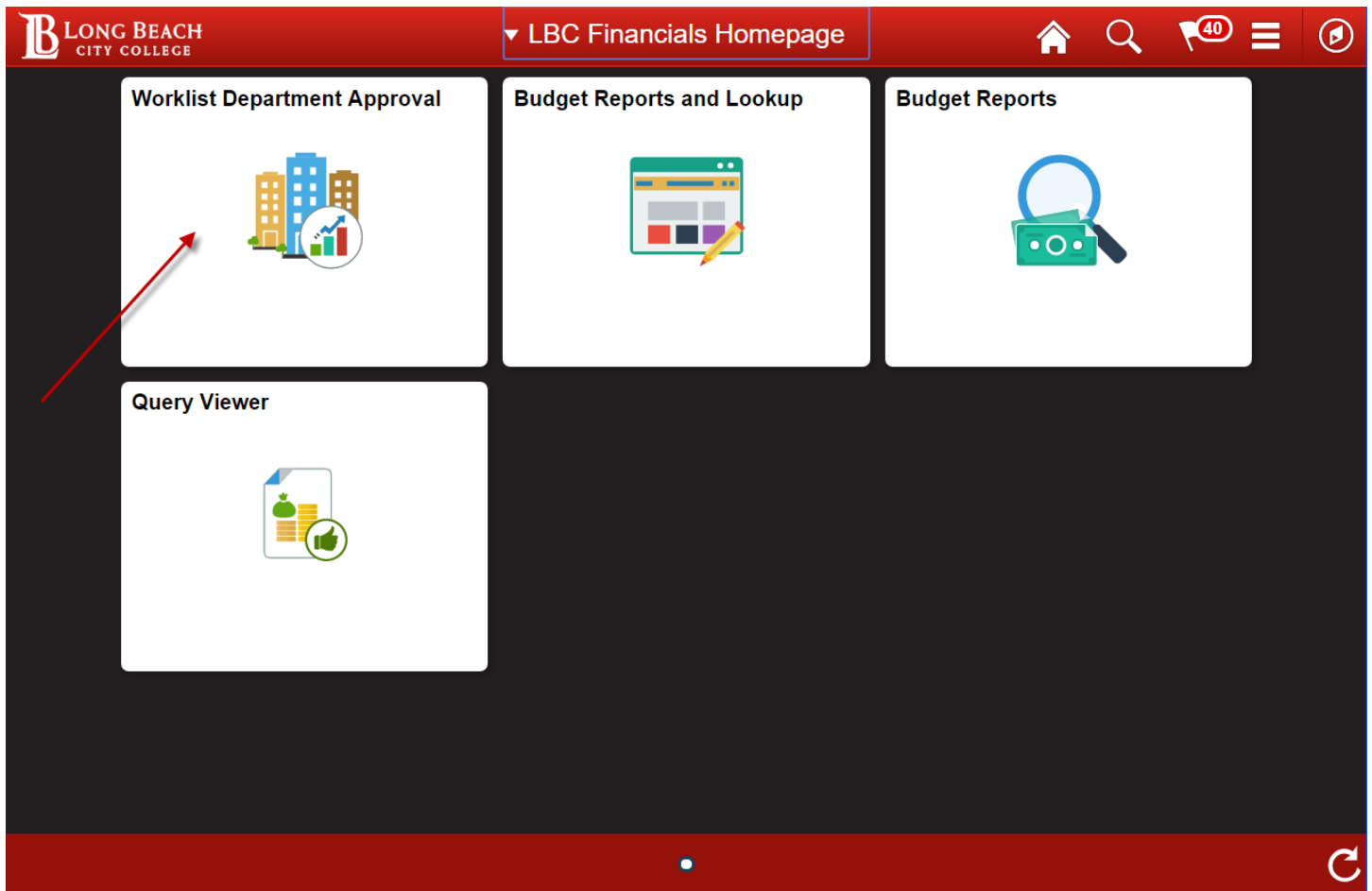


# AMOUNT APPROVAL FOR REQUISITIONS 9.2

## Amount Approval Process (Administrator & IITS)

1. To view and approve the online requisitions for your department click the **Worklist Department Approval** tile to access the Requisitions for approval. Requisitions must always be approved from the worklist only in PeopleSoft 9.2.



# AMOUNT APPROVAL FOR REQUISITIONS 9.2

- To select a requisition for **Amount Approval** (Administrator's Approval) click the blue link to the right side of the page that shows the requisition number. The online requisition number is a 10 digit number with preceding zeroes.

**LBC Financials Homepage** **Worklist Department Approval**

Print | New Window | Help | Personalize Page

## Worklist

Worklist for 0001919: Elisabeth Orr

Detail View Worklist Filters  Feed

Worklist Items						Person
From	Date From	Work Item	Worked By Activity	Priority	Link	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111670, LBCCD, 0000036234</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111671, LBCCD, 0000036235</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111672, LBCCD, 0000036236</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111673, LBCCD, 0000036249</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111676, LBCCD, 0000036259</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111685, LBCCD, 0000036270</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111686, LBCCD, 0000036271</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111692, LBCCD, 0000036286</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111693, LBCCD, 0000036287</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111694, LBCCD, 0000036288</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111698, LBCCD, 0000036292</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111733, LBCCD, 0000036336</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111819, LBCCD, 0000036455</a>	
Jane E Baker	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111841, LBCCD, 0000036482</a>	
Arne F Nystrom	07/04/2017	Req Approval Worklist	Requisition Amount Approval	<input type="text"/>	<a href="#">111735, LBCCD, 0000036338</a>	

# AMOUNT APPROVAL FOR REQUISITIONS 9.2

3. The requisition **Amount Approval** panel shows the **Requisition number**, the **Requester**, the **Requisition Date**, and the **Total Amount** of the Requisition on the main page.

Print | New Window | Help | Personalize Page

Requisition Amount Approval

Unit LBCCD    Req 0000036234    Requester Jade S Adams

\*Approval Action Approve    Approval Status In Process    View Printable Req

**Comment**

**Amount Details**

Requisition Date	07/01/2017
Total Amount	200.000 Dollar
Total Base Amount	200.000 Dollar

▶ **Line Details**

Save   View Worklist   Previous in Worklist   Next in Worklist   Notify

4. To view the **Line Details** of the individual requisition click the **Line Details** arrow near the bottom left of the page.

Print | New Window | Help | Personalize Page

Requisition Amount Approval

Unit LBCCD    Req 0000036234    Requester Jade S Adams

\*Approval Action Approve    Approval Status In Process    View Printable Req

**Comment**

**Amount Details**

Requisition Date	07/01/2017
Total Amount	200.000 Dollar
Total Base Amount	200.000 Dollar

▶ **Line Details**

Save   View Worklist   Previous in Worklist   Next in Worklist   Notify

# AMOUNT APPROVAL FOR REQUISITIONS 9.2

5. The information that now shows under the Line Details area is the **Amount/Qty** and the **Details** tabs. Click the **Details** tab to see the description of each line on the requisition.

Print | New Window | Help | Personalize Page

## Requisition Amount Approval

Unit LBCCD      Req 0000036234      Requester Jade S Adams

\*Approval Action Approve

Approval Status In Process

[View Printable Req](#)

### Comment

### Amount Details

Requisition Date 07/01/2017  
 Total Amount 200.000 Dollar  
 Total Base Amount 200.000 Dollar

### Line Details

Personalize | Find | | First 1 of 1 Last

Line	Sched	Status	Merchandise Amt	Currency	Merch Amt Base	Base Currency	Req Qty	UOM	Revision
1	1	Active	200.00	USD	200.00	USD	1.0000	LOT	

[Save](#)  
 [View Worklist](#)  
 [Previous in Worklist](#)  
 [Next in Worklist](#)  
 [Notify](#)

6. Under the **Description** is the item detail of the specific purchase for each line. Click on the **Description** link to view the complete description for each specific line.

Print | New Window | Help | Personalize Page

## Requisition Amount Approval

Unit LBCCD      Req 0000036234      Requester Jade S Adams

\*Approval Action Approve

Approval Status In Process

[View Printable Req](#)

### Comment

### Amount Details

Requisition Date 07/01/2017  
 Total Amount 200.000 Dollar  
 Total Base Amount 200.000 Dollar

### Line Details

Personalize | Find | | First 1 of 1 Last

Line	Sched	Status	Item	Description	Price Tol	Price Tol Under	% Prc Tol	% Prc Tol Under	Buyer	RFQ Required
1	1	Active		OPEN PO FOR JEWELRY SUPPLIES A	99,999,999.99999	99999999.99999	0.00		0341484	N

[Save](#)  
 [View Worklist](#)  
 [Previous in Worklist](#)  
 [Next in Worklist](#)  
 [Notify](#)

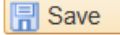
# AMOUNT APPROVAL FOR REQUISITIONS 9.2

- Click **OK** or **Cancel** after viewing the complete item description to return to approval page.

The screenshot shows a web application interface for 'Requisition Amount Approval'. At the top, there are navigation links: 'Print | New Window | Help | Personalize Page'. Below this, the page title is 'Requisition Amount Approval'. The interface includes several fields: 'Unit' (LBCCD), 'Req' (0000036234), and 'Requester' (Jade S Adams). There is a dropdown for '\*Approval Action' set to 'Approve' and an 'Approval Status' of 'In Process'. A 'View Printable Req' button is visible. A 'Comment' section is present but empty. Below that, 'Amount Details' shows 'Requisition Date' (07/01/20), 'Total Amount', and 'Total Base Amount'. The 'Line Details' section is expanded, showing a table with columns: Line, Sched, Status, Item, % Prc Tol Under, Buyer, and RFQ Required. A dialog box titled 'Item Description' is overlaid on the interface, containing the text 'OPEN PO FOR JEWELRY SUPPLIES AND MATERIALS' and two buttons: 'OK' and 'Cancel', which are circled in red. At the bottom of the interface, there are buttons for 'Save', 'View Worklist', 'Previous in Worklist', 'Next in Worklist', and 'Notify'.

Line	Sched	Status	Item	% Prc Tol Under	Buyer	RFQ Required		
1	1	Active	OPEN PO FOR JEWELRY SUPPLIES	99,999,999.99999	99999999.99999	0.00	0341484	N

# AMOUNT APPROVAL FOR REQUISITIONS 9.2

8. If you wish to approve the requisition at this point, click on the **SAVE** button,  in the bottom left of the page. By clicking the **SAVE** button you are **approving** the requisition and forwarding it to Fiscal Services for processing. **If the requisition is not going to be approved then please let Purchasing or Fiscal Services know to cancel the requisition.**

**IMPORTANT** – Under "Approval Action" the default action is "Approve". The actions Deny and Recycle also appear under Approval Action yet **DO NOT** select these actions because they are not currently being used. It is important to remember that clicking the save button at this point **approves** the requisition and forwards it to Fiscal Services for processing. **If the requisition is not going to be approved then please let Purchasing or Fiscal Services know to cancel the requisition.**

Print | New Window | Help | Personalize Page

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Requisition Amount Approval

Unit LBCCD      Req 0000036234      Requester Jade S Adams


\*Approval Action Approve      Approval Status In Process      [View Printable Req](#)

**Comment**


**Amount Details**

Requisition Date	07/01/2017
Total Amount	200.000 Dollar
Total Base Amount	200.000 Dollar

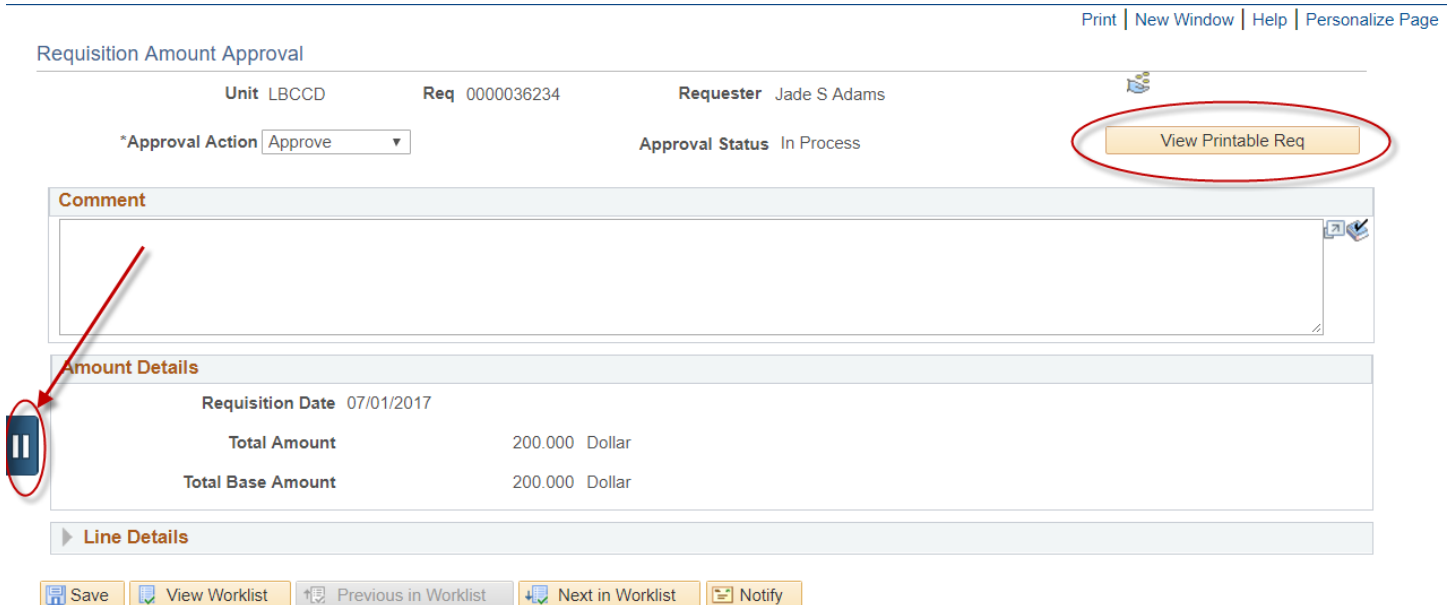
**Line Details**

 Save   [View Worklist](#)   [Previous in Worklist](#)   [Next in Worklist](#)   [Notify](#)

# AMOUNT APPROVAL FOR REQUISITIONS 9.2

9. If you require more information before approving the requisition, click the blue **View Printable Req** button  to review the entire requisition. Clicking the **View Printable Req** button starts the process running under the **Reporting Tools** and the **Report Manager** link. After clicking the **View**

**Printable Req** button, click the  **Activity Guide Navigation Area** button.



Requisition Amount Approval

Unit LBCCD Req 0000036234 Requester Jade S Adams

\*Approval Action Approve Approval Status In Process

[View Printable Req](#)

**Comment**

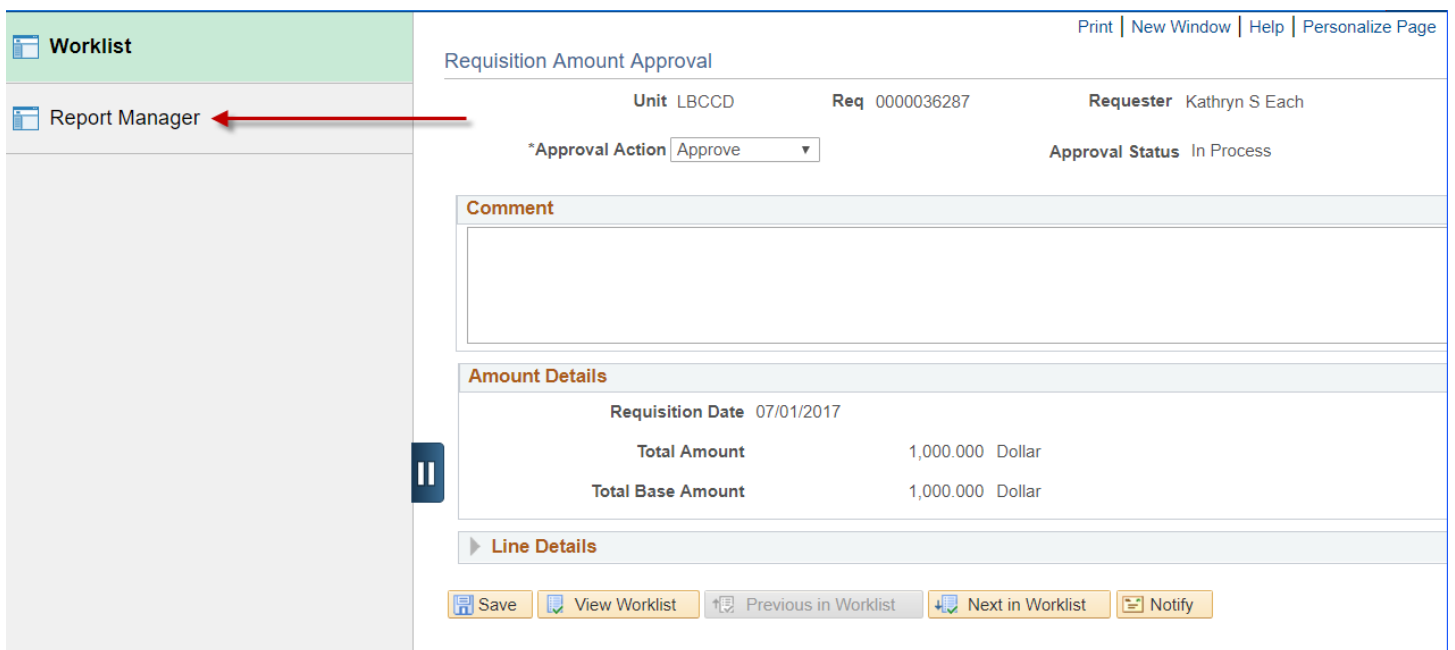
**Amount Details**

Requisition Date	07/01/2017
Total Amount	200.000 Dollar
Total Base Amount	200.000 Dollar

**Line Details**

[Save](#) [View Worklist](#) [Previous in Worklist](#) [Next in Worklist](#) [Notify](#)

10. Next click the **Report Manager** link on the left side menu.



Worklist

Report Manager

Requisition Amount Approval

Unit LBCCD Req 0000036287 Requester Kathryn S Each

\*Approval Action Approve Approval Status In Process

**Comment**

**Amount Details**

Requisition Date	07/01/2017
Total Amount	1,000.000 Dollar
Total Base Amount	1,000.000 Dollar

**Line Details**

[Save](#) [View Worklist](#) [Previous in Worklist](#) [Next in Worklist](#) [Notify](#)

# AMOUNT APPROVAL FOR REQUISITIONS 9.2

11. After you are in the **Report Manager** panel you will see the process description for Requisition Print where you can view the requisition detail. Click the yellow **Refresh** button until the **Status** is **Posted**. After the process is **Posted**, click the **Requisition Print SQR** blue link to open the requisition in PDF format.

The screenshot shows the 'Report Manager' interface. On the left, there is a sidebar with 'Worklist' and 'Report Manager' (highlighted in green). The main area is titled 'Administration | Archives' and contains a 'View Reports For' section with filters for User ID (0001919), Type, Last, Days, Status, Folder, and Instance. A red arrow points to the 'Refresh' button in the top right corner, which is circled in red. Below this is a 'Report List' table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. The first row shows a report with ID 1028656, Prcs Instance 1163631, Description 'Requisition Print SQR', Request Date/Time '07/11/2017 2:24:39PM', Format 'Acrobat (\*.pdf)', and Status 'Posted' (circled in red). The second row shows a report with ID 1028655, Prcs Instance 1163630, Description 'Requisition Print SQR', Request Date/Time '07/11/2017 2:11:13PM', Format 'Acrobat (\*.pdf)', and Status 'Posted'. Below the table are buttons for 'Select All', 'Deselect All', 'Delete', and 'Save'. At the bottom, there are links for 'Administration | Archives'.

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1028656	1163631	Requisition Print SQR	07/11/2017 2:24:39PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1028655	1163630	Requisition Print SQR	07/11/2017 2:11:13PM	Acrobat (*.pdf)	Posted	Details



# AMOUNT APPROVAL FOR REQUISITIONS 9.2

## Requisition

**Ship To:** BLDG. O-1 (Warehouse - Rear of Bldg.)  
4900 E. CONANT STREET  
LONG BEACH CA 90808

<b>Business Unit:</b> <b>LBCCD</b>		
Req ID:	Date	Page
0000036287	07/01/2017	1
Requester		Currency
Kathryn S Each		900T2300B USD
Requester Signature		

Line-Schd	Description	Quantity UOM	Price	Extended Amt Due Date
1-1	OPEN PO FOR THE PURCHASE OF INSTRUCTIONAL SUPPLIES FOR THE SOCIAL SCIENCES DEPARTMENT	1.0000 LOT	1,000.00	1,000.00

Buyer: Roland J M Ticzon  
Supplier: 0000010078 OFFICE DEPOT, INC

Total Requisition Amount:                      1,000.00

OPEN PURCHASE ORDER FOR OFFICE SUPPLIES DURING THE PERIOD OF JULY 1, 2017 - MAY 31, 2018.

PERSONNEL AUTHORIZED TO MAKE PURCHASES AND COORDINATE DELIVERIES: KATHY EACH, ESTHER CONTRERAS, JILL BIRDWELL, DEBBIE WHITTAKER

DELIVERY LOCATION INFORMATION:  
Department: SOCIAL SCIENCES  
Location: T2337  
Phone: (562) 938-4328

INVOICES MUST BE APPROVED BY: DEAN LISA ORR

432000 12 220100 1690 1,000.00

0000036287