

eProcurement and Georgia*FIRST* Marketplace

User's Guide for eProcurement Administrator



Information Technology Services

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Introduction

This User's Guide is designed for eProcurement Administrators who will be supporting the implementation and maintenance of the PeopleSoft Financials module eProcurement, or ePro, at their institution. Along with the implementation of ePro, the GeorgiaFIRST Marketplace is being implemented as well.

In this User's Guide, you will find an overview of what the eProcurement module does, as well as what the function of the GeorgiaFIRST Marketplace is. You will also learn the primary role that the ePro Administrator plays in the entire process.

Topics included in this User Guide:

- Overview of eProcurement and GeorgiaFIRST Marketplace
- eProcurement Approvals
- Updating a User's Email Address for Notifications
- Monitoring Workflow
- Reassigning Requisitions
- Assigning Alternate Approvers

Chapter 1: eProcurement and GeorgiaFIRST Marketplace Overview

What is eProcurement?

eProcurement (ePro) is a module in PeopleSoft Financials that has a primary function of creating electronic requisitions and routing them for approval. In this PSFIN module, ePro is used to create requisitions for goods and services. A requisition is simply an official request to purchase goods and services.

Previously, your institution may have used paper requisitions, or some other format, to request an item to be purchased. That hardcopy requisition then had to be routed for approval signatures, and then sent to the Purchasing Office. The Purchasing Office then had to rekey the information into the system to create a Purchase Order to send to the vendor.

With ePro, much of this is completely automated. A requisition is created within ePro and then electronically routed for approval. The approval chain is dependent on the Department charged and item type, among other things. Finally, after the last electronic approval is made, the requisition can be copied into, or sourced into an official Purchase Order that is dispatched to a vendor.

What is the GeorgiaFIRST Marketplace?

The GeorgiaFIRST Marketplace takes the use of ePro to another level. The GeorgiaFIRST Marketplace is an online shopping site that is accessed from PeopleSoft Financials. Through this online shopping site, users can shop online for contract items from a variety of state and institution approved vendors. Users can select items by placing them in an online shopping cart. They assign these shopping carts to a designated requester when ready, and the requester then turns their shopping cart into an ePro requisition.

Because users are shopping from approved vendors with contract prices, very little buyer intervention is required. After a requisition that is built from the GeorgiaFIRST Marketplace is approved, it is designed to be picked up for batch processing that will budget check it, source it into a purchase order, and then dispatch the purchase order. These batch processes are designed to run at different times throughout the day.

Types of Requisitions

With the implementation of the GeorgiaFIRST Marketplace into the eProcurement module, there are now two types of requisitions: GeorgiaFIRST Marketplace requisitions and Special Request Requisitions.

- GeorgiaFIRST Marketplace Requisitions: Shoppers build these requisitions from items in the GeorgiaFIRST marketplace.
- Special Request Requisitions: Requesters build these requisitions by entering item descriptions directly onto the requisition and are not built from the contractually-approved items in the marketplace.

Within ePro, users will not be able to combine items from the GeorgiaFIRST Marketplace with items from a Special Request Requisition into one requisition. Each requisition must be completely from the marketplace (CAT) or from a Special Request Requisition (ONL).

Benefits of ePro and the GeorgiaFIRST Marketplace

With this new system of online shopping and electronic requisitioning, you will see some immediate benefits, including:

- Reduction in paper forms routing through different offices
- Online browsing and shopping for items
- Comparison shopping
- You only need one login to shop from multiple vendors
- You can request goods from multiple vendors through one shopping cart
- All items in the GeorgiaFIRST Marketplace are contractually approved items
- Faster routing for approvals
- Ability to save items as 'favorites' in the GeorgiaFIRST Marketplace
- Automatic batch processing of approved requisitions

Types of Roles Involved

In order for the ePro and GeorgiaFIRST Marketplace functionality to work properly, users are set up with specific roles and responsibilities. They include:

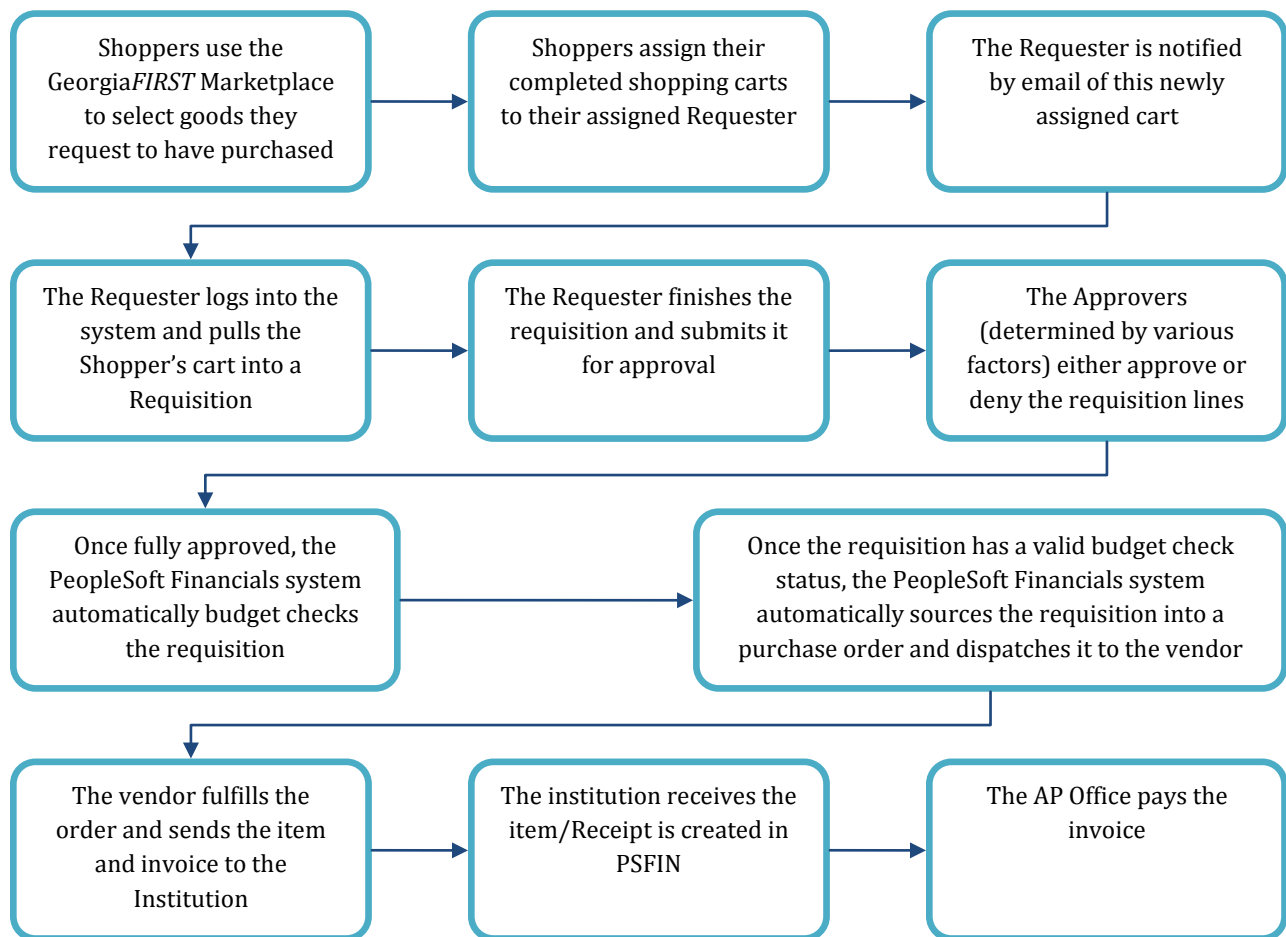
- Shoppers: These users are the ones who select items in the GeorgiaFIRST Marketplace.
- Browsers: Users without any GeorgiaFIRST Marketplace roles assigned will default to a Marketplace Browser. Browsers can view the items, contracts, and prices in the Marketplace but cannot shop or create requisitions.
- Requesters: These users take the shopping carts created by Shoppers and turn them into ePro Requisitions. Requesters can also build their own shopping carts, just like Shoppers.
- Approvers: These users are set up to approve ePro Requisitions.
- Buyers: These users are responsible for ensuring approved requisitions are sourced into a Purchase Order and dispatched to the vendor.
- AP Personnel: The AP office processes the resulting invoice from the vendor.

- ePro Administrator: This user monitors the approval workflow, to make sure requisitions are worked in a timely fashion
- Local Security Administrator: This user is responsible for setting up others users in their appropriate roles.

As the ePro Administrator, you are primarily responsible for monitoring ePro Workflow and reassigning requisitions as needed. In addition, you will need to work with the Local Security Administrator on occasion to perform maintenance on the ePro users. Since Workflow is such a critical piece of eProcurement, the resolution of any requisition Workflow issues is very important.

Process Flow

Now that you know all of the roles involved, it is helpful to understand the eProcurement and GeorgiaFIRST Marketplace process flow beginning with Shoppers and ending with the Accounts Payable office.



If the process involves a Special Request Requisition, then the shopper is eliminated from this process flow and the requester enters the items directly onto the requisition.

Chapter 2: eProcurement Approvals

A critical component to the whole eProcurement process is the ability to submit requisitions for approval electronically. Because approvals are handled online within the PeopleSoft Financials system, each institution can customize the approval process to their own specifications. In this chapter, we are going to outline the possible approval stages that your institution may choose to use.

How Do Approvals Work?

As mentioned earlier, a Requester builds a requisition in ePro. Each item on a requisition is actually placed on its own requisition line. Theoretically, each line in a requisition can be charged to a different set of Chartfields. Therefore, there may be different approval paths for each line on a requisition.

Once the Requester submits the requisition for approval, each line has its own approval path. This approval path is determined by a number of factors. At a minimum, each requisition line will go to the Department Manager and Project Manager (if a Project is to be charged). These are the managers that are tied into the Department and Project Chartfields on that requisition line.

Depending on how your institution has set up approvals for eProcurement, the requisition line may go to many additional approvers as well. This includes approvers for assets, IT items, and items above a certain amount. Below is a summary of all of the approval stages and paths available for eProcurement. To determine what stages and paths your institution is using, check with your Purchasing Department or Local Security Administrator.

Approval Stages

Overall, there are five approval stages that can be used for eProcurement requisitions. They include:

- Stage 1: Department and Project Approval
- Stage 2: Agency Fund Approval
- Stage 3: Amount Approval (for requisitions built from the GeorgiaFIRST Marketplace)
- Stage 4: Item-Type Based Approvals
- Stage 5: Buyer Approval (for requisitions not built from the GeorgiaFIRST Marketplace)

Here is a summary of each stage:

Stage 1: Department and Project Approval

This is a mandatory approval stage for all requisition lines. Each requisition line must be charged to a Department. In addition, requisition lines can be charged to a Project. The requisition line is routed to the Department Manager (as entered in PeopleSoft) for approval. If the Project Chartfield is used on the requisition line, the system also routes it to the Project Manager.

Stage 2: Agency Fund Approval

This approval stage is an optional one for institutions. It is set up so that any requisition line charged to an Agency Fund Code must go to an individual specified for Agency Fund Approvals. Agency funds are used to account for resources held by an institution as custodian or fiscal agent for individual students, faculty, staff members, or other organizations. Agency Fund Codes include from 60000, 61000, and 62000.

If your institution chooses to employ this approval stage, there may be multiple Agency Fund Approvers. Each Agency Fund Approver will have the role BOR_AGENCY_FUND_APPR. The institution will determine whether all amount approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. If an agency fund code is not used on a requisition line, the system bypasses this approval stage.

Stage 3: Amount Approval

The Amount Approval stage is also an optional one. This stage is for all requisitions that were built from the GeorgiaFIRST Marketplace and has a monetary amount of \$10,000 or more. Again, your institution may set up multiple approvers to serve as the Amount Approver. Each Amount Approver will have the role BOR_CAT_AMOUNT_APPR. The institution will determine whether all amount approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. The institution also does not have to use the \$10,000 threshold and can edit this if needed.

If the requisition was not generated from the GeorgiaFIRST Marketplace, it will bypass this approval stage (this can be changed by the institution). If the requisition is below the set threshold and was generated from the GeorgiaFIRST Marketplace, it will also bypass this approval stage.

Stage 4: Item-Type Based Approvals

In Approval Stage 4, approvals are based upon the type of item being requested. Within this stage, there are seven potential approval paths. Each path is optional for the institutions.

- **Stage 4, Path 1: Asset Approval**

If the item on a Requisition line is an asset and charged to an Asset Account, it will be routed to the person set up as the Asset Approver. The accounts included in this path are 743200, 744200, and 800000 through 899999.

An Asset Approver must have the role “BOR_ASSET_APPR.” If your institution chooses to use the Asset Approver path, there can be multiple asset approvers. The institution will determine whether all asset approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. In addition, institutions may identify additional account codes for asset approval, and they may add monetary amount criteria (i.e., item charged to Account 743200 and is greater than \$5,000.).

- **Stage 4, Path 2: Audio Visual Approver**

This is an optional approval path and is for any item on a requisition line that contains an NIGP code related to Audio Visual items or services. NIGP stands for National Institute of Governmental Purchasing Commodity Services Code. The NIGP Code is a coding classification used primarily to classify products and services procured by state and local governments.

In PeopleSoft, the Category ID is tied into the NIGP Code. In the GeorgiaFIRST Marketplace, the NIGP code is already tied into item. For requisition line items not generated from the Marketplace, the Requester enters the proper Category ID. For those line items that have an NIGP Code related to Audio Visual items and services, the system will route the requisition line to the Audio Visual Approver.

An Audio Visual Approver must have the role “BOR_AUDIO_VIS_APPR”. If your institution chooses to use the Audio Visual (AV) Approver path, there can be multiple AV approvers. The institution will determine whether all AV approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. In addition, institutions may identify additional NIGP codes for audio visual approval, and they may add monetary amount criteria (i.e., item has an NIGP code of 06400 and is greater than \$1,000.).

- **Stage 4, Path 3: Chemical Approver**

This path is also an optional one, and is for any requisition line with an NIGP code associated with chemicals. If the NIGP code for the requisition line is associated with a chemical purchase, the line will route to the Chemical Approver.

A Chemical Approver must have the role "BOR_CHEMICAL_APPR". If your institution chooses to use the Chemical Approver path, there can be multiple Chemical Approvers. The institution will determine whether all chemical approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for chemical approval, and they may add monetary amount criteria.

- **Stage 4, Path 4: Facilities Planning and Design Approver**

This optional path is for any requisition line with an NIGP code associated with the facilities planning and design.

A Facilities Planning and Design Approver must have the role "BOR_FACILITIES_APPR". If your institution chooses to use the Facilities Planning and Design Approver path, there can be multiple approvers in this path. The institution will determine whether all Facilities Planning and Design approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for facilities planning and design approval, and they may add monetary amount criteria.

- **Stage 4, Path 5: IT Approver**

This approval path is for any IT hardware or software approvals, and is also optional. For any requisition line that is for a computer hardware or software purchase or service (based on NIGP Code), the system routes the line to the IT Approver.

An IT Approver must have the role "BOR_IT_APPR". If your institution chooses to use the IT Approver path, there can be multiple approvers in this path. The institution will determine whether all IT Approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for IT approval, and they may add monetary amount criteria.

- **Stage 4, Path 6: University Relations Approver**

The sixth approval path in stage 4 is also optional and is for the University Relations Approver. For any requisition line that relates to media contact, logo use or copyright items (based on NIGP code), the system routes it to the University Relations Approver.

The University Relations Approver must have the role “BOR_UNIVREL_APPR”. If your institution chooses to use the University Relations Approver path, there can be multiple approvers in this path. The institution will determine whether all University Relations Approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for University Relations approval, and they may add monetary amount criteria.

- **Stage 4, Path 7: Default NIGP Code – 00000**

The seventh approval path in stage 4 will route to a Buyer Approver in the event that a GeorgiaFIRST Marketplace Requisition line does not have an NIGP code. If the line item does not have an NIGP code, it will default to the “00000” NIGP code. This requisition line will automatically route to a Buyer Approver for correction.

Stage 5: Buyer Approval

In Approval Stage 5, the system will route all special request requisitions (those requisitions not built from the GeorgiaFIRST Marketplace) to the person designated to give buyer approval. This stage is primarily used for Special Request Requisitions since they are not built from contract-approved catalogs. The Buyer Approver can then ensure the line item meets all procurement policies.

Institutions may choose to have multiple Buyer Approvers. In addition, the Institution can choose whether all Buyer Approvers must approve the requisition or if only one needs to act on it. Finally, the institution may choose to inactivate this stage or include it for all requisitions.

Approval Time Limits

Within the system, there are built-in time limits that an approver has to act on the requisition. This ensures that ePro requisitions do not sit around waiting for an approver for an indefinite amount of time.

When a requisition is submitted for approval, the system sends it to the first approver’s Worklist, within PeopleSoft Financials. The Worklist is a queue which holds items waiting for approval. Once an approver works a transaction, it is removed from their Worklist.

Once the requisition hits an Approver’s Worklist, that approver has three days to either approve or deny it, before they get a reminder notification from the system. If the requisition sits in an Approver’s Worklist for four days without being approved or denied, the system removes the requisition from that Approver’s Worklist, and you as the ePro Administrator will need to reassign the transaction to another approver. After the Approver has approved the requisition, the system automatically moves it onto the next Approver’s Worklist. If an Approver denies a requisition, the system returns it to the Requester. Denied requisition lines can be edited and resubmitted for approval.

If an approver will be out of the office for an extended period of time and will be unable to work the requisitions in their Worklist, they have the ability to assign an alternate to serve in their place. This way, their Worklist does not build up while they are out of the office, and requisition approval is not delayed. As the ePro Administrator, you will also have this ability if you need to assign an alternate approver.

Each institution is able to customize the number of days as to when the system will send reminder emails and escalates a requisition.

Chapter 3: ePro Monitoring and Maintenance

In Chapter 2, you learned the various ePro Workflow approval stages and paths. Your institution can choose which stages and paths they want to implement. Timely requisition approvals are critical to the ePro functionality. The tasks in this chapter detail how you will need to maintain Workflow and ePro users.

Updating an User's Email Address for Notifications

There may be times when a user informs you that they are not receiving their ePro notifications. These notifications may include when a requisition has been created for a shopper, when a requisition has been approved or denied, and when requisition items need to be received. If a user is not receiving their notifications, you will need to work with the Local Security Admin to correct the user's email address in their profile.

You can verify and update a user's email address through the **Distributed User Profile** pages. You can also add multiple email addresses for a user. However, one must be selected as a primary address. The system sends notifications to the primary email address.

Primary Email Account	Email Type	Email Address
<input type="checkbox"/>	Home	homeemail@bellsouth.net
<input checked="" type="checkbox"/>	Business	anyuser@email.edu

How To: Update a User's Email Address

1. In the menu, select **PeopleTools**.
2. Select **Security**.
3. Select **User Profiles**.
4. Select **Distributed User Profiles**.
5. On the **Find an Existing Value** tab, enter the **User's ID**.
6. Click the **Search** button.
7. On the **General** tab, select the **Edit Email Addresses** link.
8. Make any necessary updates to the existing email address.
9. To add another email address, click the **Add a new row** button.
 - a. Select the email type.
 - b. Enter the email address.
10. Ensure the **primary email address** is selected.

11. Click the **OK** button.
12. Click the **Save** button.

Monitor ePro Requisition Workflow

As the ePro Admin, you will need to monitor Workflow. The requisitions that cannot be successfully routed because of a missing or invalid User ID for Department and Project approvers will be sent to you. In addition, if your institution has chosen to use a particular Workflow stage and path (i.e., Chemical Approvers), but no one has been given that security role, the transaction will route to you.

For these transactions that cannot be successfully routed, you will need to manually reassign them to the correct approver. You may also have to work with the Local Security Admin to resolve security role issues that are preventing the approval request from reaching the assigned approver.

When a Requisition approval cannot be sent to the correct approver and is then routed to the ePro Administrator, this is noted in the Workflow routing. Below is a screenshot of a requisition routed to the ePro Administrator (Support Administrator) because there was no Department Manager assigned as the approver in the Department Chartfield definition.

Confirmation

Requested For:	Support Administrator	Number of Lines:	1
Requisition Name:	0000300044	Total Amount:	2,500.00 USD
Requisition ID:	0000300044		
Business Unit:	39000		
Priority:	Medium		
Budget Status:	Not Checked		

Line Dept and Project Approval

Line 1: Pending [View Comments](#)
[Start New Path](#)

Add an item for Purchasing

Department Approval

Skipped

No Approvers Found
Req-Dept Mgr-Line Level

→

Pending

Support Administrator
Error Step

→

Approval Comment History

System at 7/9/2008 - 6:03 PM

Not enough approvers were found at: step number 2, path Department Approval, stage 1. Routing to Admin.

Submit
Edit Requisition
Apply Approval Changes
Check Budget

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

This is what the Requester will see after they submit the requisition. As the ePro Administrator, you will use the **Monitor Approvals** page to see which transactions you need to resolve. You will enter criteria to look for **Requisitions** in the **Approval Process** for your **ePro Admin User ID**.

Monitor Approvals

Search Criteria

Approval Process: Requisition SetID:

Header Status: Last Modified:

Approver: SUPPORT Support Administrator

Approver Status:

Originator:

Search

In the search results, you need to look for requisitions that are in a **Pending** status. This means that the requisition needs approval.

Search Results

Select All Deselect All

Approval Process: Requisition

Business Unit: Requisition ID:

Filter

	Modified	Status	Business Unit	Requisition ID
<input type="checkbox"/>	1 Never	Terminated	39000	0000300044
<input type="checkbox"/>	2 Never	Pending	39000	0000300044

If you select the requisition ID of the transaction in a Pending status, the system will take you to another page where you can reassign the transaction. If you see a row with a “Terminated” status, this means that the transaction was initiated but was eventually stopped. There is nothing you need to do with row in a Terminated status on this page.

Monitor Approvals

Approval Process: Requisition **SetID:** 39000
Business Unit: 39000 **Requisition ID:** 0000300044

Approver:

Comments:

Reassign Pending Tasks

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Reassign To: **Allow Self-Approval**
 Allow Auto Approval

Administrative Approve/Deny

Act on behalf of the approver selected above by clicking the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Line Dept and Project Approval

Line 1: Pending [View Comments](#)
[Start New Path](#)

Add an Item for Purchasing

Department Approval

Skipped

No Approvers Found
Req-Dept Mgr-Line Level

→

Pending

[Support Administrator](#)
Error Step

→

Approval Comment History

System at 7/9/2008 - 6:03 PM
Not enough approvers were found at: step number 2, path Department Approval, stage 1. Routing to Admin.

[Return To Search](#)

In the “**Reassign To**” field, you need to enter or select the User ID of the approver that should receive the requisition. You may need to work with your Security Admin and Purchasing office to make sure the approver is properly setup in the system, including security roles and Department or Project Chartfield value setup if necessary.

After reassigning the requisition, the approval path should show the new approver in the **Pending** step.

Monitor Approvals

Approval Process:	Requisition	SetID:	39000
Business Unit:	39000	Requisition ID:	0000300044
Approver:	<input type="text" value="SHUMPHREY"/>		
Comments:	<input style="width: 100%;" type="text"/>		

Reassign Pending Tasks

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Reassign To:

Allow Self-Approval
 Allow Auto Approval

Administrative Approve/Deny

Act on behalf of the approver selected above by clicking the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Line Dept and Project Approval

Line 1: Pending [View Comments](#)

Add an Item for Purchasing [Start New Path](#)

Department Approval

Skipped

No Approvers Found
Req-Dept Mgr-Line Level

→

Pending

Sherry Humphrey for Support Administrator
Error Step

→

+

Approval Comment History

System at 7/9/2008 - 7:46 PM
Reassigned from SUPPORT to SHUMPHREY (18130,2022)

System at 7/9/2008 - 6:03 PM
Not enough approvers were found at: step number 2, path Department Approval, stage 1. Routing to Admin.

The newly assigned approver should be able to see the requisition in their Worklist now. In the **Approval Comment History** section, the history of the ePro Admin reassigning the requisition is captured.

Requisition Approval

Req Name: 0000300044
 Total: 2500.00 USD

Requester: [Support Administrator](#)
 Entered on: 07/09/2008
 Status: Pending
 Requester's Justification:
 No justification entered by requester.

Business Unit: 39000
 Requisition ID: 0000300044
 Priority: Medium

[Edit Requisition](#)

Line Information

Line	Item Description	Vendor Name	Qty	UOM	Price	Curr
1	Add an Item for Purchasing...		100.0000	EA	25.00	USD

[Select All / Deselect All](#)
[View Line Details](#) [Approve](#) [Deny](#)

Review/Edit Approvers

Line Dept and Project Approval

Line 1: Pending [View Comments](#)
 Add an Item for Purchasing [Start New Path](#)

Department Approval

Skipped
 No Approvers Found
 Req-Dept Mgr-Line Level

Pending
 Sherry Humphrey for Support Administrator
 Error Step

Approval Comment History

System at 7/9/2008 - 7:46 PM
 Reassigned from SUPPORT to SHUMPHREY (18130,2022)

System at 7/9/2008 - 6:03 PM
 Not enough approvers were found at: step number 2, path Department Approval, stage 1. Routing to Admin.

Monitoring ePro Workflow to ensure that Requisitions are properly routed is an activity that must be performed daily.

How To: Reassign Requisitions Routed to ePro Admin

1. In the menu, select **Set Up Financials/Supply Chain**.
2. Select **Common Definitions**.
3. Select **Approvals**.
4. Select **Monitor Approvals**.
5. In the **Approval Process** field, enter/select **Requisition**.
6. In the **Approver** field, enter/select the **ePro Admin's ID**.
7. Click the **Search** button.
8. In the Search Results, locate any rows with a "**Pending**" Status. You will need to reassign any transactions in a pending status.
9. Select the **Requisition ID** link for a row with a Pending status.
10. Review where the requisition skipped approval and the reason why it skipped approval in the "Line Dept and Project Approval" section. You may need to work with your Local Security Admin and Purchasing office to determine if the correct approver has the appropriate roles and setup.

11. Once you have resolved why the approver level was skipped, you can reassign the requisition. In the **Reassign To** field, enter/select the **approver** you want to reassign the requisition to in the Reassign Pending Tasks group box.
12. Click the **Reassign** button.
13. You can search for the requisition again on the **Monitor Approvals** page to verify that it is no longer assigned to the ePro Admin.

Assigning an Alternate Approver

Approvers have been given instructions on how to set up an alternate approver for their requisitions when they will be away from the office and will be unable to work them. There may be occasions when they will not be able to do this, and you will need to set up their alternate approver for them.

When you assign an alternate approver, you specify the appropriate date range. For example, if you received word that Approver “A” had to take emergency leave and will be out of the office for the next two weeks, you set up their alternate approver for those two weeks.

When you use assign an alternate approver, this will only affect future requisitions. If there are any requisitions currently in the original approver’s Worklist, they will not be affected. You should not use the “Reassign Work” section of this page. Instead, you can use the procedure for reassigning requisitions (page 19). Rather than searching for requisitions for the ePro Admin, you can search for requisitions for this approver.

The dates that you enter for the alternate approver mean that at 12:00 a.m. on the “From Date”, any new requisitions assigned to the original approver will automatically be sent to the alternate approver’s

Worklist. New requisitions will continue to be sent to the alternate approver until 11:59 p.m. on the “To Date.” After that, the system will resume routing any new requisitions to the original approver.

When you assign an alternate approver, you must ensure that the alternate has the appropriate security approval roles assigned to them first. You will need to work with your Local Security Admin to do this.

How To: Assign an Alternate Approver

1. In the menu, select **PeopleTools**.
2. Select **Security**.
3. Select **User Profiles**.
4. Select **Distributed User Profiles**.
5. In the **User ID** field, enter the User ID of the **approver** who will be unable to work Requisitions for a specific period of time.
6. Click the **Search** button.
7. Select the **Workflow** tab.
8. In the **Alternate User ID** field, enter/select the **User ID** of the alternate approver that you are assigning.
9. In the **From Date** field, enter/select the beginning date that requisitions should route to the alternate approver.
10. In the **To Date** field, enter/select the ending date that requisitions should route to the alternate approver.
11. Click the **Save** button.