Default Approving in P2P: Quick Start Guide

PeopleSoft Customer Support: 514-4100, Option 2, Option 2 (Mon-Fri 8-5)

1. Log into **PeopleSoft** from a UCSF computer or through VPN access: https://peoplesoft.ucsf.edu/psp/fsprd/?cmd=login
2. Enter **User ID**. If unknown, contact your Access Administrator.
   Note: *P2P users will use the same User ID for RAS, Journals and WebLinks access.*
3. Enter **Password** and click **Sign In** button. Click "Forgot Your Password?" link if needed.

Download P2P documents from CPBC website, including P2P Approving Manual:
http://cpbc.ucsf.edu/p2p/how_to_use_p2p

Step 1: Identify Requisitions for Approval

Navigate to **Requisition Approval** page via (A) **Worklist** or (B) **Approve Requisitions** Links.

(A) Navigate to Requisition Approval Page via Worklist

1. Click Worklist in upper right navigation on PeopleSoft homepage.
2. Select "Approval Routing" from **Work List Filters** dropdown.
3. Click a specific REQ ID number in the **Link** column. **Requisition Approval** page opens.

(B) Navigate to Requisition Approval Page via Approve Requisitions Screen

1. Navigate to **eProcurement>Approve Requisitions**.
2. Type search criteria, and click **Search**.
3. Click a specific REQ ID number in the **Req ID** column. **Requisition Approval** page opens.

Step 2: Review Requisition Details

1. Review **Requester's Justification** in header, if any.
2. Click  next to line item to open **Requisition Comments** page to review line item comments and attachments, if any.
3. Review line details, including chartfields, Ship To, quantity, and $ Total:
   a. Click checkbox next to individual line item or click Select All / Deselect All.
   b. Click **View Line Details** to open **Requisition Details** page in new window, and review details. Close **Requisition Details** window and return to **Requisition Approval** page.

Step 3: Edit Requisition (if needed)

See steps on reverse to:
- **Edit Chartfields & Split Funding**
- **Assign Ad Hoc Approvers or Reviewers**

Step 4: Approve or Deny Requisition

1. Type explanation of approval or denial for **Enter Approver Comments**. *Comments are required for denials only.*
2. Click **Approve** or **Deny**. Confirmation page opens.

Edit Chartfields for Entire Requisition

1. Click **Edit Requisition** on **Requisition Approval** page.
2. On **Edit Requisition** page, click Select All / Deselect All, and click **Modify Line / Shipping / Accounting** to open page.
3. Edit chartfields in **Fund**, **DPA**, **Program**, and **FYR** as needed.
4. Click **Apply** to return to **Edit Requisition** page.
   - ➢ OPTIONAL: Type **Justification Comments** to note any changes.
5. Click **Save & submit**. Confirmation page opens.
6. Click Requisition Approval to proceed to approval.

Edit Chartfields by Line Item

1. Click **Edit Requisition** on **Requisition Approval** page.
2. Under **Chartfields** tab, click arrow next to individual line item.
3. Edit chartfields in **Fund**, **DPA**, **Program**, and **FYR** as needed on each line.
   - ➢ OPTIONAL: Type **Justification Comments** to note any changes.
4. Click **Save & submit**. Confirmation page opens.
5. Click Requisition Approval to proceed to approval.

Split Chartfields for Entire Requisition

1. Click **Edit Requisition** on **Requisition Approval** page.
2. On **Edit Requisition** page, click Select All / Deselect All, and click **Modify Line / Shipping / Accounting** to open page.
3. Click  on accounting line to add additional funding lines.
4. Add chartfields for all funding lines.
5. Enter **Percent** (i.e., “50”) for each funding line.
6. Click **Apply** to return to **Edit Requisition** page.
   - ➢ OPTIONAL: Type **Justification Comments** to note any changes
7. Click **Save & submit**. Confirmation page opens.
8. Click Requisition Approval to proceed to approval.

Assign Ad Hoc Approvers or Reviewers

1. From **Requisition Approval** page, click arrow next to **Review/Edit Approvers** to expand.
2. Click  next to current Approver box to add in sequential order or click  Start New Path to add in parallel order. New window opens.
3. Select **Approver** or **Reviewer**, and type or lookup **User ID**. Click **Insert** to return to **Requisition Approval** page.
4. Click **Apply Approval Changes**, and proceed to approval.