Core-💯

OPM PSA/POS Budget Approvals

Navigation:

Select **Core-CT Financials** Click the **eProcurement** tile



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Click Approvals



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- 1. From the Pending Approvals page, select the filters button = and input the search criteria
- 2. Click Filter



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3. Click on the Requisition to open the transaction

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			Requisition 300,000.00 USD	DASS1 / 0000001328 / DAS-	/ MOB DAS-BID		Req Amount Approver 1	Routed 05/29/2024	>
			Requisition 85.51 USD	DASM1 / 0000008915 / DAS-	/ pushback	C & C JANITORIAL SUPPLIES INC	Req Amount Approver 1	Routed 07/26/2024	>
			Requisition 20.27 USD	DASM1 / 0000008919 / DAS	/ Punchout Test	SUBURBAN STATIONERS INC	Req Amount Approver 1	Routed 08/28/2024	>
			Requisition 332.97 USD	DASM1 / 0000008920 / DAS-	/ ILT Example	W B MASON COMPANY INC	HOLD	Routed 09/11/2024	>
			Requisition 120.00 USD	DASM1 / 0000008928 / DAS-	/ PSA		Agency Submitter	Routed 09/25/2024	,



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4. View PSA/POS Details by Clicking on **PSA Details** Link.

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5. View Header Comments and Attachments by Clicking the **Header Comments** and **Attachments** link:



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7. On the Line details click the \rightarrow to view the Distributions for the line

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8. Close window.



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Click the back button to access the View Printable version link; when done, close window

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10. A Printable version of the requisition will open.



Business Unit:	TECM1		Requester: 1597	710		_	Status: Pend	ing Approva	
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11. Select Approval Chain to see the stages within the approval process.

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12. This will display the Approval Chain along with the status of the requisition at each stage. Click to close the Approval Chain

Approval Chain	
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- 13. Based on the approver's review and accuracy of the requisition, the approver can perform the following actions. Click **Approve** to approve the requisition.
 - a. A pop-up window to enter Approver Comments will appear.
 - i. Comments are optional for the **Approve** action.
 - b. Enter Comments if necessary and Click Submit.
 - c. The requisition drops from the approver's list, and the next level of approvers will get an Action notification.
 - d. Once the requisition is fully approved, the Requester will receive an *Alert* notification and an email.

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14. Click **Deny** to deny the requisition.

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Requisition	
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- a. A pop-up window to enter Approver Comments will display.
- b. Comments are required for the Deny action

Cancel	Deny	Submit
You are about to	deny this request.	
Approver Comm	ients	
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c. If comments are required on an action and not entered, an error message will display.



- 15. Enter Comments and Click Submit.
- 16. The workflow will stop, and the requisition will be terminated.
- 17. The Requester will receive an *Alert* notification and an email.
- 18. Click **More** to pull up more actions for the requisition.

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Request for PSA Test 120.00 USD						Approve Deny More
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- 19. Click **Pushback** to send requisition back to the previous level of Amount Approvers if any.
 - a. A pop-up window to enter Approver Comments will display.
 - b. Comments are required for the Pushback action.
 - c. The previous Amount Approver will receive an Action notification and an email.
 - d. The Requester will receive an Alert Notification and an email.



Pushback	Submit
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Or

20. Click **Hold** to place requisition on hold.

- a. A pop-up window to enter Approver Comments will display.
- b. Comments are required for the Hold action
- c. The requisition will drop to the bottom of the list for the Approver who placed it on hold, and it will be removed from the rest of the approvers' list that follow.
- d. The Requester will receive an Action notification and an email.

Cancel	Hold	Submit
You are a	bout to put this request on hold.	
Approver	r Comments	
Commen	its are Required	
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- 21. Click **Request Information** to request more information on the requisition.
 - a. A pop-up window to enter Approver Comments will display.
 - b. Comments are *required* for the **Request Information** action
 - c. The Requester will receive an Action notification and an email
 - d. Enter Comments and Click Submit.



You are about to request more information for this request.	
Approver Comments	
Comments are Required	
	11

22. Approve and Deny actions will bring the user back to their approval list. 23. Any of the actions under More will keep the requisition on the screen.

- 24. **Approve** the requisition and it routes to the next approver in Workflow
 - a. Requisition Status: Pending
- 25. **Deny** the requisition requires a comment and gets routed back to the PSA_POS Requester
 - a. Requisition Status: Denied

26. **Hold** will send a message to the PSA_POS Requester requiring additional information. The requester will access the requisition, make the necessary changes, and re-submit the requisition. The requisition will route directly to the approver that placed it on Hold. The requisition cannot move forward in workflow until the OPM Approver takes it off HOLD and approves it once the required documentation has been added.

a. Requisition Status: Pending

Once Approved, the requisition will be routed to the next OPM Approver and the Approvers step status will change to APPROVED on the Approval Chain.

To view any PSA_POS document, OPM Approvers, using the Fluid Dashboard navigate to: Core-CT Financials > eProcurement > Manage Requisition and search for a



PSA_POS requisition using criteria. i.e. Req. number, Req. Type, Date Range, etc. Financial Reports can also be developed by request as needed for business requirements.

There are three (3) roles for this process:

- OPM Budget Approver 1 OPM Budget Analyst and backup responsible for approving PSA_POS requisitions
- OPM Budget Approver 2 OPM Budget Section Director responsible for approving PSA_POS requisitions
- OPM Final Budget Approver OPM Budget Section Director responsible for approving PSA_POS requisitions