



How to Approve a Requisition in NeoEd

Situation: You are a member of the Requisition Approver Group, and you receive an email notification to take an action on a new requisition. You need to review, approve, deny, put a requisition on hold, or add any relevant information.

There are 2 main approval groups (see the full list and example in Appendix):

- Approval group from hiring offices and departments: These are cost center managers specific to an office, division or department.
- Fiscal, Business & Administrative, Presidential and HR approval group: Approvers from 4 groups will approve all PCC job requisitions.

1. Login

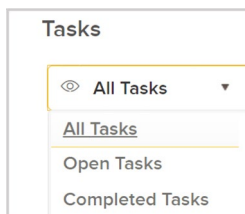
- Go to URL: <https://pasadena.edu/faculty-and-staff/index.php>
- Click NeoEd Workforce Management Platform
- Use your PCC login credentials to log in

2. Find the requisition to approve:

- Click the Dashboard tab. Requisitions waiting for your approval are under My Tasks.



- If you have a long list, click View All, then filter all your tasks by status.



- Click on the Requisition title to open.



- The Approval screen opens.
 - Action buttons are on the top left area.
 - Workflow status are on the right pane.

1. Action buttons

2. Workflow status

Approval Timeline

- 1 Pending
PLSF - Police & Safety
- 2 Pending
FSSR - Fiscal Services
- 3 Pending
BASR - Business and Administrative Services Main
- 4 Pending
PROF - President Office Main
- 5 Pending
HRES - Human Resources Main

3. Actions: You can put a requisition on hold, approve, or deny.

- **Hold:** If you need more time to decide, place the requisition on hold. Click Hold, add optional comments to let other stakeholders requisition know the reason.

Requisition Approval
Police Officer Test (00063)

✓ Approve ✗ Deny **Hold**

Comment (Optional)
I need more time to review.

- **Approve:** Click Approve, add optional comments if needed, then Submit.
 - **Fiscal Services approvers:**
 - Enter the Position Control Number (PCN) in the Approval Comment box
 - If this is a grant funded position, and the end date is not in the Requisition (General Comment section), enter the Grant End Date here.

Requisition Approval
Police Officer Test (00063)

Approve ✗ Deny Hold

Comment (Optional)
I approved this on behalf of Fiscal.

- Deny:
 - Deny if any requisitions details are wrong.
 - **Always enter a reason in the approval comment box.**
 - Fiscal Services approvers:
 - **Check the workflow against the different types of workflows in the Appendix section. Deny if it is incorrect.**
 - You can send back one step, or several steps. If error is in the requisition details, send it back to the very first step. The originator will update the requisition.

4. Where does the requisition go after you take an action?

Action	Approval Group	Viewable on Screen
No action, Hold	Yourself	My Task
Approved	The next approval group in the workflow	Req. leaves My Task/ "View All"
Denied	The inbox of the approver on the step you send it back to	Req. leaves My Task.

5. View an Approval Comment:

- Open the Req.
- Click the Approvals tab.
- Expand the individual approver section.
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6. View the Approval Workflow History of a req. you're involved with:

- Open the Req.
- Click the Approvals tab.
- Approval Timeline pane is on the right.

Requisition Detail
Director of Marketing (00008) Approved

Requisition Information Approvals History

Approvals

- SCMK - Strategic Communications & Marketing
approved on 02/09/2021 by Alexander Boekelheide
Alexander Boekelheide
- PROF - President Office Main
approved on 02/09/2021 by Erika Endrijonas
Erika Endrijonas
- BASR - Business and Administrative Services Main
approved on 02/09/2021 by Michael Bush
Michael Bush
- FSSR - Fiscal Services (Budget)
approved on 02/09/2021 by Maria Alzaga
Chedva Weingart , +3 more
- HRES - Human Resources Main
approved on 02/09/2021 by Bob Blizinski
Brian Cummins , +1 more

Approval Timeline

- 02/05/2021
Alexander Boekelheide approved
- Last Tuesday at 11:52 AM
Maria Alzaga denied
- Last Tuesday at 1:56 PM
Alexander Boekelheide approved
- Last Tuesday at 1:59 PM
Erika Endrijonas approved
- Last Tuesday at 2:04 PM
Michael Bush approved
- Last Tuesday at 2:13 PM
Maria Alzaga approved
- Last Tuesday at 3:38 PM
Bob Blizinski approved

1. **Standard Workflow:**

1. Cost Center Manager (Hiring Office)
2. Fiscal Services (Budget)
3. Functional Area Vice President (Hiring Department)
4. Business & Administrative Services VP
5. Superintendent
6. Human Resources

2. **New position to the district.**

1. Cost Center Manager (Hiring Office)
2. **Superintendent**
3. Fiscal Services (Budget)
4. Functional Area Vice President (Hiring Department)
5. Business & Administrative Services VP
6. Human Resources

3. **Grant funded position.**

1. Cost Center Manager (Hiring Office)
2. Add **Fiscal Group – Grant Funded** as follows:
 - a. Click “Add Approval Group”
 - b. Select “**FSGR – Fiscal Services – Grant Related**”
 - c. Add Brigitte Norsworthy and Chedva Weingart as approvers
 - d. **Save.** Drag this group to the second position (after #a on this list). See instructions on reordering approval group in the Notes section.
3. Fiscal Services (Budget)
4. Functional Area Vice President (Hiring Department)
5. Business & Administrative Services VP
6. Superintendent
7. Human Resources

4. **New grant funded position to the district.** Modify the workflow as follows:

1. Cost Center Manager (Hiring Office)
2. Superintendent
3. Fiscal Group – Grant Funded (“**FSGR – Fiscal Services – Grant Related**”)
4. Fiscal Services (Budget)
5. Functional Area Vice President (Hiring Department)
6. Business & Administrative Services VP
7. Human Resources

5. **Positions funded by multiple cost centers.**

1. **Cost Center Manager #1 (Hiring Office)**
2. **Cost Center Manager #2 (Hiring Office)**
3. **Cost Center Manager #3 (Hiring Office)**
4. Superintendent
5. Fiscal Services (Budget)
6. Functional Area Vice President (Hiring Department)
7. Business & Administrative Services VP
8. Human Resources

6. **Positions funded by grant and cost center.**

1. **Cost Center Manager (Hiring Office)**
2. **FSGR – Fiscal Services – Grant Related** Superintendent
3. Fiscal Services (Budget)
4. Functional Area Vice President (Hiring Department)
5. Business & Administrative Services VP
6. Human Resources

7. **Position for hiring offices with flat hierarchy.**

Some hiring offices have a flatter approval hierarchy than others, where the Cost Center Manager is also the Functional Area Manager (Steps #1 and #3 in the Standard Workflow).

Example: Alex Boekelheide is the Cost Center Manager for Strategic Communication and Marketing, but is also the Hiring Manager for his department.

1. **Cost Center Manager (Hiring Office)**
2. Fiscal Services (Budget)
3. Business & Administrative Services VP
4. Superintendent
5. Human Resources

8. Example of a Standard Approval Workflow

