PECOS Purchase 2 Pay (P2P) System

Quick guide: Approving a requisition

Partners Procurement Service

Introduction

This quick guide provides a one page reference to users of the PECOS system on the approval of requisitions. Approval can be for financial approval, to approve changes, or for specialist intervention for equipment like IT or Medical Devices. The process itself is the same. The guide is intended to be a high level quick reference rather than an exhaustive explanation of how the system works. More detailed information can be found in the online help or by downloading the PPS user guide at http://nhspps.uk

Steps

You will know when you are required to approve either a requisition or order request (depending on the workflow settings) from one of three sources:
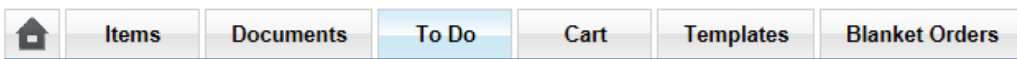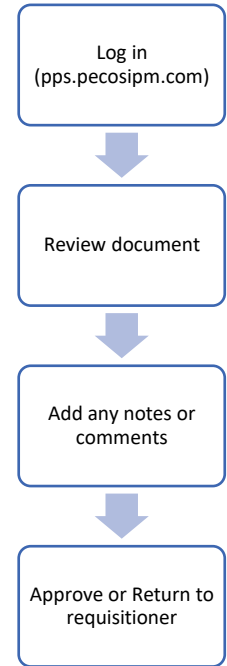
    a. From an email notification asking you to log in and review the document
    b. From an email notification allowing you to approve or reject directly from the email
    c. By logging onto PECOS and reviewing your To Do list

TIP: You do not need to have access to the Trust network to access PECOS. Approval can be carried out from any device with an internet connection

If you receive an email that allows you to approve the document via the email i.e. without logging into PECOS. Simply click the relevant button and your response will be recorded in the system. This is particularly helpful if you are in a meeting and you want to release an order without logging into the system. That's it! Read no further.

If you receive an email without the approve buttons embedded, open the HTML attachment and you will be directed to PECOS and asked to sign in. You will then be presented with the document to approve.

Alternatively, navigate to the PECOS site: https://pps.pecosipm.com. On the home page you will see a summary of documents for your action. You can also see a list by clicking on the **To Do** tab. Once you see a list, click on one of the order numbers to view the document.

Log in
(pps.pecosipm.com)

Review document

Add any notes or comments

Approve or Return to requisitioner

| 🏠 | Items | Documents | To Do | Cart | Templates | Blanket Orders |

Next, review the request and perform any checks you need to make. Look at the audit trail which shows you where the document has been and who has approved it before you. Also have a look at any additional comments and attachments.

If you are happy to approve, make any notes in the box at the top or bottom of the page and click **Approve**.

If you would like to reject or ask for more information from the requisitioner, type a note and click **Return to Requisitioner**.

You will be taken back to your to do list where you can review and approve any other outstanding documents.

Getting Help

You can get further help on using the PECOS system from the online help, accessed through the question mark [?] icon on the top right of the page.

You can also review guidance documents, or refresh yourself on the eLearning at http://nhspps.uk

If you are still experiencing problems, you can log a call with the PPS help desk either online at http://nhspps.uk or by calling 020 3322 1935.