Quick Start Guide to Approve / Deny a Requisition

1) You will receive an email in Outlook that you have a requisition that needs to be approved.
2) Click on the Email Hyperlink
   - This will take you to the PeopleSoft Financials application, and you will be prompted to login.
3) Login into PeopleSoft Financials using your NetID (UserID) and password.
   - Your User ID needs to be in ALL Capital letters. Your password is case sensitive.
   - You will use the same login that you use for Softserv.
4) The email link will take you to the approval screen for the requisition to approve, OR you can click on the Worklist on the top right corner of the screen.
5) If you click on the WorkList, this will now display all requisitions that are assigned for you to approve or deny, if needed. Click on the Requisition Hyperlink that displays the Requisition number.
6) At the Requisition Approval screen, review the Requisition for appropriateness.
7) If you want to approve the requisition, make sure all the lines are check-marked and click on the Approve button.
   - If you want to deny the requisition, make sure all lines are check-marked by clicking the Select All/Deselect All hyperlink, add a reason in the comment field, and click the Deny button. (ALL LINES MUST BE DENIED, even if there is only a problem with one line.)
8) When finished, click on the Sign-out link on the top right-hand corner of the screen.
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Requisitions

EP.020.660GRU - Approving or Denying an ePro Requisition
This topic demonstrates how to approve or deny a requisition from someone in your approval workflow. Once a user submits a requisition, it is automatically sent for approval. As an approver, you can either approve or deny it.

As someone who must approve requisitions, you can easily locate all pending requisitions through the Worklist link.

Topic Objectives:
Upon completion of this topic, you will be able to:
- Identify where you can access pending requisitions awaiting your approval.
- Describe how to preview detailed line information and the chartfields associated with each requisition line.
- Identify how to reject a line from a multi-line requisition.
- Approve a requisition.

Key term:
Below is a key term used in this topic:
- Worklist - Definition of term Worklist is the automated to-do list that PeopleSoft Workflow creates. From the Worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

Procedure

For this topic, imagine that one of your employees has entered an eProcurement Requisition for your approval. You will be notified through Outlook Email that you have a requisition for approval. The email message will include a link to click on that will take you to PeopleSoft Financials to approve the requisition.

Another way to see your requisitions that require your approval is to view your WorkList. The WorkList will track all transactions that require your approval. This example uses the WorkList to look up your requisition for approval.
## Step 1

Click the **Worklist** link.

![Image of Worklist link](image-url)
### Step 2

**Action**

Click an entry in the Requisition link column.
### Step 3

Click the **View Line Details** button to preview more line information and the chartfields for each line.
Requisition:

Requester: 
Business Unit: 12000 
Requisition ID: 0000293924 
Date: 6/14/2014

Comments: $63/hr FOR 344 HOURS = $17,200...THIS CONTRACT WILL BE EFFECTIVE AUGUST 1, 2014 THROUGH MAY 31, 2015.

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<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Qty</th>
<th>Price</th>
<th>Curr</th>
<th>UOM</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PHYSICAL DIAGNOSIS WITH STUDENTS...</td>
<td>344</td>
<td>60.000</td>
<td>USD</td>
<td>HR</td>
<td>17200.00</td>
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</tbody>
</table>

<table>
<thead>
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<th>Sched Line</th>
<th>Ship To</th>
<th>Attention</th>
<th>Due Date</th>
<th>Qty</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
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<td>PAVILION III (CJ)</td>
<td>CJI020/DEBORAH PINION</td>
<td>3/15/2014</td>
<td>344</td>
<td>17200.00</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Line</th>
<th>Location</th>
<th>Req Qty</th>
<th>Amount</th>
<th>GL Unit</th>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
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</thead>
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<td>344</td>
<td>17200</td>
<td>12000</td>
<td>751103</td>
<td>10650</td>
<td>04476000</td>
<td>11100</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Click the <strong>Close</strong> button when you are done reviewing the lines.</td>
</tr>
</tbody>
</table>
5. Click the Vertical scrollbar to see all of the approvals.

6. Enter information into the Approver Comments field, if needed. If you are going to deny the requisition, you MUST enter comments.

7. Click the Deny button, if you want to deny the requisition.

8. Click the Approve button, if you want to approve the requisition.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Note that after the requisition has been approved by you, then it is removed from your WorkList.</td>
</tr>
</tbody>
</table>
| 10.  | Congratulations! You have just completed the Approving or Denying a Requisition topic.  
**End of Procedure.**