

Access Your Worklist

1. Log into PeopleSoft Financials Core System with your **User ID** and **Password**.
2. Click the **Worklist** hyperlink in the upper right corner of the home page.

Worklist for dwhite_40: Diane Eleanor White

From	Date From	Work Item	Worked By Activity	Priority	Link		
Requester 35	03/09/2015	Approval Routing	Approval Workflow	2-Medium	Requisition_2859993_40000_1905-01-01_N_0_BUSINESS_UNIT:40000_REQ_ID:0000500088	Mark Worked	Reassign
Requester 35	03/09/2015	Approval Routing	Approval Workflow	2-Medium	Requisition_2859998_40000_1905-01-01_N_0_BUSINESS_UNIT:40000_REQ_ID:0000500089	Mark Worked	Reassign

3. Click a **Requisition link** under the “link” column to display a requisition.

Approve a Requisition

Requisition Approval

Business Unit 40000
 Requisition ID 0000500088
 Requisition Name 0000500088
 Requester Requester 35
 Entered on 03/09/2015
 Status Pending
 Priority Medium
 Budget Status Not Checked

Total Amount 363.87 USD

Requester's Justification
 No justification entered by requester.

Line	Item Description	Supplier Name	Quantity	UOM	Price	
1	Rubbermaid - Utility/Service...	OFFICE-CAT-001	1.0000	EA	104.00000	USD
2	Rubbermaid - Heavy-Duty Plas...	OFFICE-CAT-001	1.0000	EA	259.87000	USD

Approve Deny

Enter Approver Comments

1. Select the **requisition** from your **Worklist**.

2. Review each line item’s descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item’s details by selecting them with a **checkmark** and clicking the **View Line Details** button.
4. Review the **approval path** if desired. You can insert additional approvers if needed (see lesson #).
5. Enter any **comments** you wish to add to the requisition. Do not include any slashes (/) in the comments field.
6. Select the lines you want to approve with a **checkmark** and then click the **Approve** button.
7. After receiving the approval confirmation, click the **Return to Worklist** link.

Deny a Requisition

1. Select the **requisition** from your **Worklist**.
2. Review each line item’s descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item’s details by selecting them with a **checkmark** and clicking the **View Line Details** button.
4. Review the **approval path** if desired.
5. Enter **comments** explaining why you are denying the requisition. Do not include any slashes (/) in the comments field.
6. Select the **lines** you want to deny with a **checkmark** and then click the **Deny** button.
7. After receiving the denial confirmation, click the **Return to Worklist** link.

Insert an Ad-Hoc Approver

Department and Proj. Approval

The screenshot displays two requisition lines. Each line has a 'Department and Proj. Approver' section. The first line, 'Line 1: Initiated', is for 'Rubbermaid - Utility/Service Cart - Service Cart, 500 lb Cap. (250 lbs per shelf), Tan'. The second line, 'Line 2: Initiated', is for 'Rubbermaid - Heavy-Duty Plastic Utility Cart - Service Cart, 500 lb Cap., Tan'. Both lines show a 'Not Routed' status and a 'Department and Proj. Approver' section with a box for 'Diane Eleanor White' and a red arrow pointing to the right.

1. Select the **requisition** from your **Worklist**.
2. Review each line item’s descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item’s details by selecting them with a checkmark and clicking the **View Line Details** button.

4. Review the **approval** path.
5. Click the **green plus sign (+)** where you want to insert the ad hoc approver.
6. Click the **User ID** look up icon in the pop-up window.
7. **Search** for the name or User ID of the approver you want to add. Click on that person's name.
8. Select either **Approver** or **Reviewer**.
9. Click the **Insert** button.
10. Click the **Apply Approval Changes** button.
11. Enter any **comments** you wish to add to the requisition. Do not include any slashes (/) in the comments field.
12. Select the lines you want to approve with a checkmark and then click the **Approve** button.
13. After receiving the approval confirmation, click the **Return to Worklist** link.

Push-Back a Requisition to the Previous Approver

1. Select the **requisition** from your **Worklist**.
2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item's details by selecting them with a checkmark and clicking the **View Line Details** button.
4. Review the approval path if desired.
5. Enter **comments** as to why you are pushing the requisition back to the previous approver. Do not include any slashes (/) in the comments field.
6. Select the lines you want to push back with a checkmark and then click the **Push Back** button.
7. After receiving the Push Back confirmation, click the **Return to Worklist** link.

Assign an Alternate Approver

The screenshot shows the 'General Profile Information' page. A red arrow points to the 'Alternate User' section. The page includes the following sections:

- General Profile Information**: Includes a redacted name and a 'Password' field with a 'Change password' link and 'Change or set up forgotten password help' link.
- Personalizations**: Includes 'My preferred language for PIA web pages is: English', 'My preferred language for reports and email is: English' (dropdown), 'Currency Code' (input field with search icon), and 'Default Mobile Page' (input field with search icon).
- Alternate User**: Includes a note: 'If you will be temporarily unavailable, you can select an alternate user to receive your routings.' Below this are fields for 'Description' (input field with search icon), 'From Date' (input field with calendar icon, example: 12/31/2000), and 'To Date' (input field with calendar icon, example: 12/31/2000).

1. In PeopleSoft Financials Core System, select **eProcurement** in the menu.
2. Select **My Profile**.
3. Select the **Alternate User ID** look up icon.

4. Search for your alternate user by either **User ID** or name (Description).
5. Select your alternate user by clicking on their **User ID**.
6. Enter the **Effective Date From**.
7. Enter the **Effective Date To**.
8. Click the **Save** button.