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.

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

Approve a Requisition

1. Select the requisition from your Worklist.

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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**

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

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

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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.