HOW TO
Approve/Deny Requisitions

This job aid provides information on how to approve or deny requisitions for those inserted into approval workflows in PeopleSoft. This designation is given per job title, and is in place to prevent improper purchases or uses of funds.

Accessing Your Worklist
1. Log into PeopleSoft Financials using your User ID and Password
2. Click ‘Worklist’ in the upper right corner of the home page
3. Click on a Requisition ID under the ‘Link’ column to display a requisition
4. Take one of the three actions below:

• Approving a Requisition
  1. Review each line’s allocation by clicking the checkbox to the left of each line and clicking View Line Details
  2. Review attached supporting documentation by clicking on the comment bubble then clicking View
  3. Enter any comments you wish to add in the Enter Approver Comments field (do not use slashes (/) in your comments)
  4. Once reviewed, click Approve
  5. After receiving your approval confirmation, click Return to Worklist

• Denying a Requisition
  1. Review each line’s allocation by clicking the checkbox to the left of each line and clicking View Line Details
  2. Review attached supporting documentation by clicking on the comment bubble then clicking View
  3. If you are denying a requisition, the system requires that comments must be entered explaining why along with any directives for the Requester in the Enter Approver Comments field (do not use slashes (/) in your comments)
  4. Click Deny
  5. After receiving your denial confirmation, click Return to Worklist

• Push-Back Function
  1. Review each line’s allocation by clicking the checkbox to the left of each line and clicking ‘View Line Details’
  2. Review attached supporting documentation by clicking on the comment bubble then clicking ‘View’
  3. Enter comments as to why you are pushing back the requisition to the previous approver (do not use slashes (/) in your comments)
  4. Click ‘Push Back’
  5. After receiving confirmation of the push-back, click ‘Return to Worklist’