Approving/Denying Requisitions

This job aid is designed to help you approve or deny requisitions in your Worklist.

1. Log into **PeopleSoft Financials**. You may also follow the URL in the notification email you received alerting you to the transaction awaiting your action. If you are not logged into PeopleSoft, you will need to login before seeing the requisition.

2. Select the **Worklist** hyperlink in the upper right corner of the home page.

3. Select a **Requisition** link to display requisition details on the **Approval** page.

4. To review a line item's description, click on its **Item Description** hyperlink.

5. To review line details such as Distribution and Ship to information, select it with a checkmark and click the **View Line Details** button (multiple lines may be selected at the same time).

6. To review the Approval path, click the **Expand** icon next to **Review/Edit Approvers**.

   a. To insert additional approvers or reviewers, click the green plus sign (+) where you want to insert the ad hoc approver(s).

   b. Click the **User ID** look up icon in the pop-up window.

   c. Search for the name or User ID of the approver you want to add. Click on that person's name.

   d. Select either **Approver** or **Reviewer**.

   e. Click the **Insert** button.

   f. Click the **Apply Approval Changes** button.

7. Enter any **comments** you wish to add to the requisition.

   a. If you are denying requisition lines, you must enter comments.

   b. Do not include any slashes (/) in the comments section.

8. The lines awaiting your approval are automatically selected. If you do not wish to take action on a line, you will need to remove the checkmark from the line(s).

9. Ensure the lines you want to approve are selected with a checkmark and then click the **Approve** button.

   a. If you need to deny requisition lines, you will need to deny the entire requisition (select all lines). Enter comments explaining why the requisition is denied and if the requisition should be corrected and resubmitted. After ensuring all lines are selected, click the **Deny** button.

10. After receiving approval/denial confirmation, click the **Return to Worklist** link to process/approve additional requisitions.