

### 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	<a href="#">Requisition_2859993_40000_1905-01-01_N_0_BUSINESS_UNIT:40000_REQ_ID:0000500088</a>	Mark Worked	Reassign
Requester 35	03/09/2015	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition_2859998_40000_1905-01-01_N_0_BUSINESS_UNIT:40000_REQ_ID:0000500089</a>	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 Information

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

Select All / Deselect All

View Line Details Approve Deny

Review/Edit Approvers

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 list of approvers, including 'Diane Eleanor White' at the 'Req-Dept Mgr-Line Level'. A red arrow points to the '+' icon next to the approver name in the first line, indicating where to click to add an ad-hoc approver.

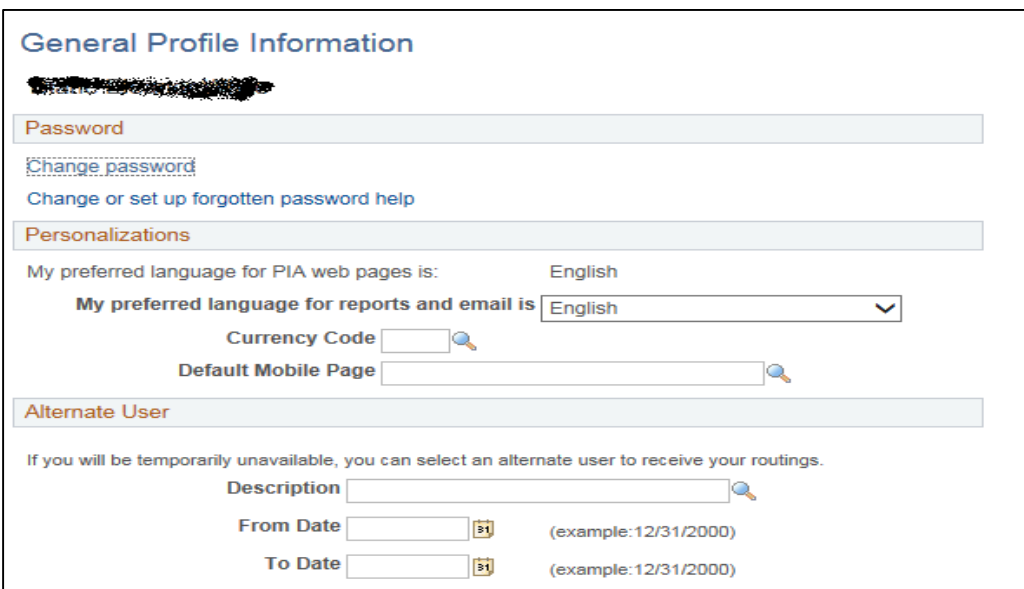
1. Select the **requisition** from your **Worklist**.
2. Review each line item’s descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item’s details by selecting them with a checkmark and clicking the **View Line Details** button.

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



**General Profile Information**

**Password**

[Change password](#)

[Change or set up forgotten password help](#)

**Personalizations**

My preferred language for PIA web pages is: English

My preferred language for reports and email is: English

Currency Code

Default Mobile Page

**Alternate User**

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Description

From Date  (example: 12/31/2000)

To Date  (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.