Approving a Requisition

There are three ways to initiate approving a requisition in PeopleSoft.

1. From the e-mail notification you receive.
2. From the new Manage Requisition Approvals page.
3. From the PeopleSoft Worklist.

**Note**: Smartphones are NOT supported devices for approving PeopleSoft requisitions.

**Method 1: E-mail Notification**

1. As the Approver, you will receive an e-mail message indicating that you have a requisition waiting approval in your PeopleSoft Worklist.
2. Click on the link at the bottom of the message.
3. You will be prompted to log into PeopleSoft, if you are not already logged in. Enter your User ID and Password.
4. The Requisition Approval page displays.
5. Once on the Requisition Approval page, see reverse side for step by step instructions.

**Method 2: Manage Requisitions Approvals Page**

1. In PeopleSoft, navigate using the menu to: **Purchasing, Requisitions, Manage Requisition Approvals**.
2. Click on the **Search** button to retrieve requisitions awaiting your review. You may have to adjust the search criteria at the top of the page prior to clicking on the Search button.
3. To approve a requisition, click on the link for the requisition in the **Req ID** column.
4. The Requisition Approval page displays.
5. Once on the Requisition Approval page, see reverse side for step by step instructions.

**Method 3: PeopleSoft Worklist**
(This was the method used in the prior version of PeopleSoft Financials)

1. To open the Worklist, click on the **Worklist** link in the Navigation Header in the top right of the PeopleSoft window.
2. Your Worklist will open and will display requisitions awaiting your approval.
3. To review a requisition, click on the link for the requisition in the **Link** column.
4. The Requisition Approval page displays.
5. Once on the Requisition Approval page, see reverse side for step by step instructions.

As an Approver, you have three options available:

- **Approve**: If you Approve a requisition, you are agreeing to all of the contents of the document. You are also moving the requisition to the next step in the Requisition Life Cycle, Budget Checking.
- **Deny**: If you Deny a requisition, you are stopping the requisition from moving to the next step in the Requisition Life Cycle. Denied requisitions will be closed.
- **Hold**: If you Hold a requisition, you are sending it back to the Requester for additional information or modification. Once the Requester responds with information or changes, you will again receive notification and be able to review and approve, or deny, once again.
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Regardless of the method you choose to initiate the Approval Process, you will end up at the Requisition Approval page.

Requisition Approval Page:

1. To view the requisition, click on the link for View printable version in the top right quadrant of the window.

A separate window will open - DO NOT close this window. Closing the window will cancel the report process. It may take up to 30 seconds for this screen to appear – please be patient and do not click the View Printable Version link a second time.

2. Add comments in the large edit box prior to selecting an action.

   Note: Comments are required for Deny and Hold.

3. Click on the Approve, Deny or Hold button.

   The page will update and reflect the action just taken. For example, if the requisition was approved:

4. The Requester will now receive an e-mail message stating the requisition was Approved, Denied or put on Hold. For Holds and Denials, Requesters are directed to review the Approver’s comments on the Approval Page by clicking on the link provided.