CASE WESTERN RESERVE UNIVERSITY EST. 1826

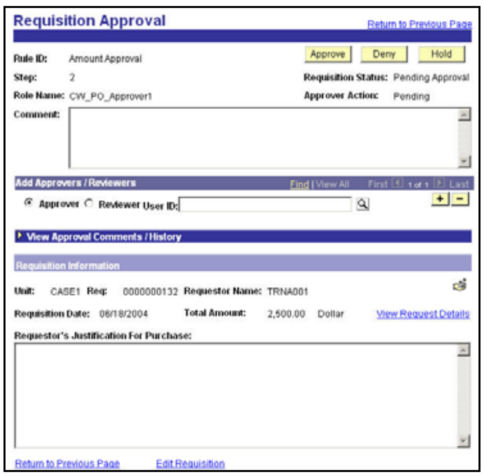
PeopleSoft 8.4 Quick Reference Guide
Approving Requisitions

Approving Requisitions

1. **Login** to PeopleSoft using your assigned Approver ID.
2. The PeopleSoft home page appears.
3. Click the **Worklist** hyperlink in the upper, right-hand toolbar.

   Your Worklist page appears.
4. Select the **work item** you want to review.

   The Requisition Approval page appears.



5. Open a New Window to review the requisition details.
6. In the new window that opens, use the left-hand navigation menu to open the **Purchasing** menu group.
7. Open **Requisitions**.
8. Click Maintain Requisitions.

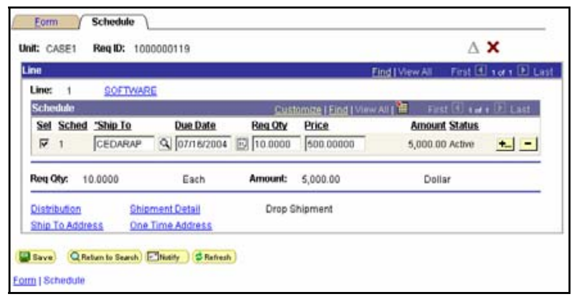
   The Requisitions – Add a New Value Page appears.
9. Click the Find an Existing Value tab.

   The Requisitions – Find an Existing Value Page appears.
10. Enter the Requisition ID you wish to review.
11. Click Search.

    The Requisition Form page appears.

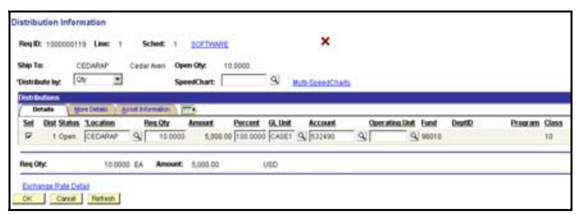
12. Review the item(s) being purchased.
13. Click the Schedule tab.

    The Schedule page appears.



14. Click the Distribution link to review the SpeedType and Account.

    The Distribution Information page appears.



15. Scroll to the right to verify that the SpeedType and Account information is correct.
16. Click Cancel to return to the Schedule page.
17. Click the Form tab to return to budget check the requisition.

    The Form page appears.

18. Click (upper right corner) to run the budget check process.

The budget check process runs and the status on the page changes when the process is complete.

19. Return to the Worklist window to complete the approval process.

Your Worklist reappears.

20. Enter **Comments** related to your decision.

21. If you need to add other approvers or reviewers to this requisition:

- ◊ Select the **Approver** or **Reviewer** radio button.
- ◊ Enter the User ID of the Approver or Reviewer or use the Lookup button to select the User ID.
- ◊ Click the + button to select additional Approvers or Reviewers as needed.

22. Click either the **Approve** or **Deny** button.

The Requisition Status changes to Approved or Denied.

23. Click the **Return to previous Screen** hyperlink.

Your Worklist page appears.

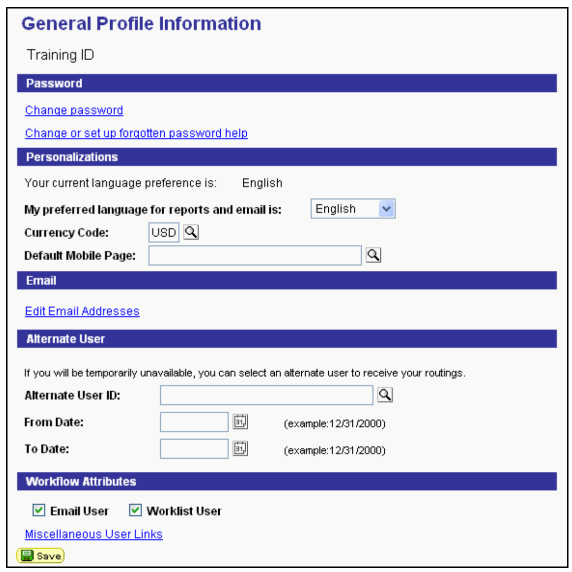
24. Repeat steps 3-22 as needed to complete approval of the items in the worklist.

Assigning Approver Duties

Because automated workflow assigns transactions to the approver's worklist, you may find a need to temporarily assign your approver duties if you are out of the office for a significant period of time. The following steps will allow you to re-assign those duties to another individual.

1. Click My System Profile at the bottom of the PeopleSoft main menu.

The General Profile Information page appears.



2. Enter an **Alternate User ID** in the Alternate User section.

This is the Case ID for the user to assume your duties.

3. Enter the first date you will be gone as the From Date.

4. Enter the date you will return as the **To Date**.

5. Click Save.

The information is saved and will be in effect for the selected date