

CATERING APPROVER REFERENCE GUIDE

Sign into PeopleSoft

Use the URL below to log into the PeopleSoft site:

[link to FMS system - https://finance.montclair.edu](https://finance.montclair.edu)

On the sign in screen, enter your CWID and NetID Password and click the Sign In button.

Accessing the PeopleSoft Worklist and Approving Requests

When a catering purchase requisition has been created in FMS, the Approver receives an email with a link to the request, where they should review the details and process the request.

Otherwise, the Approver can sign into FMS and click the Worklist link to view open items to process.

1. Once signed into PeopleSoft, click the Worklist link in the upper right corner of the *Home* page.

A list of items assigned to the Approver displays.

2. Click the **link** of the targeted requisition to open.

From	Date From	Work Item	Worked By Activity	Priority	Link
Elizabeth Pataki	10/23/2017	Approval Routing	Approval Workflow	2-Medium	Requisition 286595 SHARE 1912-01-01 N O BUSINESS UNITMSU01 REQ 1010000029951

3. The Approver should review the displayed information and select the system action (**Approve, Deny, Hold**) for the request. If the request is to be denied or held, the Approver must enter a comment in the **Enter Approver Comments** field BEFORE selecting the system action.

Line	Item Description	Supplier Name	Quantity	UOM	Price	Price
1	Catering Services	COMPASS GR.001	178.0000	EA	1.00000	USD

4. Review the information displayed, confirming the correct Fund and Department have been identified.
5. To **APPROVE** the requisition, click the **Approve** button.
6. **DENY** the requisition to have changes made by the requisitioner. Scroll down to the *Enter Approver Comments field* and enter the changes to be made, or a reason why this requisition will not be approved. Then, click the **Deny** button. The requisitioner will receive an email with the information included.
7. **To HOLD** a requisition for a period of time, scroll down to the *Enter Approver Comments field* and enter information on why the request is on hold. Then, click the **Hold** button. The requisition will stay in the holding state until the Approver changes the status.
8. Once processed, the Requisition Approval screen displays with the approval flow updated, the requisition is sent for conversion to a purchase order, and the original link is removed from the Worklist.

The screenshot displays the 'Requisition Approval' interface. At the top, a 'Confirmation' section shows a green checkmark and the message: 'CTR#11126-Planning Meeting has been routed for further approval.' Below this is a 'Review/Edit Approvers' section. It shows a 'Requisition Approval' summary for 'Line 1: Approved' under 'Catering Services'. A 'Non-Grant Requisition Approval' box indicates the status is 'Approved' by 'Yanling Sun, Department Manager' on '10/20/17 - 10:41 AM'. A 'Return to Worklist' link is at the bottom.

Delegate Approval Authority

When an approver will be out of the office for a certain amount of time, they can delegate their approval authority to another individual with at least the same system security.

NOTE – Delegation of Authority can only be used for a specific amount of time. It should not be set up for an open-ended period.

1. From the **Main Menu**, select **My System Profile**.
2. On the **General Profile Information** screen, scroll to the **Alternate User** section.
3. Click the **Search** button at the Alternate User ID field to search for your delegate.

The Look Up Alternate User ID window displays.

4. Set the Search term as User ID or last name.
5. Enter your search term and select the **Look Up** button.
6. From the list of search results, **double click** on the appropriate name to select that person as your delegate.

You will be returned back to the General Profile Information screen.

7. Enter the **start and end dates** of the delegation period in the appropriate fields.
8. Click the **Save** button at the bottom of the screen.

The system will route items needing your approval to your delegate for the selected period.

User ID	Description
0001004369	Prasad Reddy
01004369	Prasad Reddy
01004436	Zoheir Puthawala
10001321	Gina Balestracci
10002149	Victoria Nidweski
10002400	Alexandra Brown