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

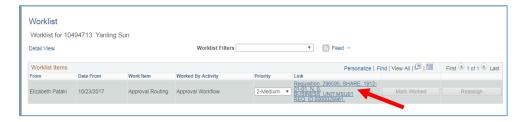
On the sign in screen, enter your CWID and NetID Password and click the Sign In button.

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.

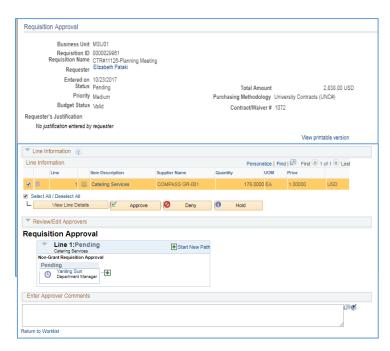
1. Once signed into PeopleSoft, click the Worklist link in the upper right corner of the *Home page*.

A list of items assigned to the Approver displays.

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

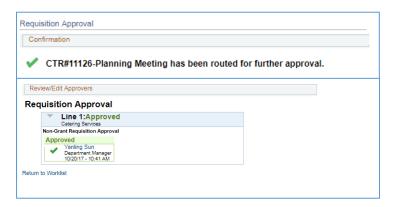


 The Approver should review the displayed information and select the system action (Approve, Deny, Hold) for the request. If the request is to be denied or held, the Approver must enter a comment in the Enter Approver Comments field BEFORE selecting the system action.



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- 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.



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.

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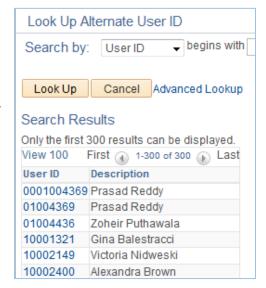
The Look Up Alternate User ID window displays.

- 4. Set the Search term as User ID or last name.
- 5. Enter your search term and select the **Look Up** button.
- 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.



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