**FMS Requisition Approver Reference Guide**

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**Sign into PeopleSoft**
Use the URL below to log into the PeopleSoft site: [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**
Approvers who have items to review and process will receive an email informing them to sign into PeopleSoft to view the items. Click the link within the email to directly access the targeted requisition.

Otherwise, follow the steps below:

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.

3. When the **Requisition Approval** screen displays, select the checkbox to the left of the line(s) to review.

4. Click the View Line Details button to open a new window with the specific line item information.

5. Confirm the request is compliant with Procurement Policy 1 on the Procurement Services website, and that any required documentation is attached to the requisition.

6. Review the information displayed and pay special attention to the ChartField codes – Fund, Department, Account. These codes indicate where this expense will be listed within your budget. For Grant and Capital Project requisitions, the PC Business Unit, PC Project/Grant, and Activity fields must also be complete.

7. When finished reviewing the information, click the **X** on the **Requisition** tab of the active window to close it and return to the Approval screen.

8. To **APPROVE** the requisition, click the **Approve** button.

9. **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.

10. 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.
The item will be removed from your Worklist once you have processed it. A notification will be sent to the requisitioner with your comments regarding requisitions that were denied or held.

**Open the Chart of Accounts**
The Chart of Accounts is a listing of the new PeopleSoft codes used to identify the fund, department, and account number associated to every transaction in the system. It also identifies grant information for grant specific tasks.

To access the Chart of Accounts, go to: [http://www.montclair.edu/finance-and-treasury/news/article.php?ArticleID=14802&ChannelID=48](http://www.montclair.edu/finance-and-treasury/news/article.php?ArticleID=14802&ChannelID=48), and click the COA.xls link on the right of the page.

An Excel spreadsheet opens and contains the FRS Account Codes – now FMS Departments and Funds, and the FRS Object Codes – now FMS Account numbers.

**NOTE** - When approving requisitions in PeopleSoft, it is the responsibility of the Approver to confirm that the correct Fund, Department, Account and Grant (when required) codes are indicated within the transaction.

**Category Codes with Additional Approvals**
All the following category code will require additional or special approval. When searching for these category codes, please enter the following key words as a starting point:

- **OIT** - all IT related items/services - require IT buyer approval
- **PRN** - custom printing - require printing approval
- **CTR** - catering - require accounting approval, not Procurement approval
- **CR** - check requests

**Add Approvals**
Additional approvers, or reviewers (parties that will have read-only access to the requisition) may need to be added to the approval flow of a requisition. Amend the preset approval flow to include these individuals on the Confirmation screen of the requisition.

**NOTE** – Adhoc approvers and reviewers must be added to the approval flow BEFORE the original approver processes the requisition.

Reviewers will receive an email notifying them that they have been included on a requisition. Reviewers will not need to do anything to process the requisition, it is only for their informational purpose. The requisition will remain in the Reviewer’s Worklist until they clear it. To access cleared requisitions, the Reviewer will need to search for them (please see Search for Processed Requisitions topic below).

1. Click the **green plus sign** next to the last approver’s name in the **Requisition Approval** box.

![Requisition Approval](image)

A dialog box opens displaying search and selection options.

2. Click the **Search** button to enter the name of the additional individual.
3. Enter the search term and click **Search**.
4. Select the appropriate user name.
5. Click **OK**.
6. You will be brought back to the **Insert** window.
7. Select the role for the adhoc approver.
8. Click **Apply Approval Changes**.
The Approval Flow will update to display the additional individual’s name and role.

**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.
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.

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**Search for Processed Requisitions**

Approvers can search for requisitions which previously required their approval within the system.

1. From the **Main Menu**, select **eProcurement**, and then select **Manage Requisition Approvals**.

The **Manage Requisition Approvals** screen will open and display the **Search Requisitions** fields.

A search can be performed on the requisition ID number, requisition name, date to, date from, requester, entered by, or status.

Status fields which can be searched upon include pending, approved, denied, on hold, and pushed back. Any requisitions with a history of the selected status will be displayed in the search results.

2. Enter the appropriate search criteria into the corresponding fields.
3. Click the **Search** button.
4. The list of items matching your search criteria are listed below the Search button.
5. Click the requisition ID link of the targeted requisition to view the request details.

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For assistance with PeopleSoft, please contact the IT Service Desk.

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