Simplified Instructions For Approving & Budget Checking Requisitions

1. In the **PeopleSoft Financial Menu** find the **Worklist tab** at the top left side of the page and click.

2. On the Worklist will be a column list of requisitions. The list begins with **Amount Approvals** requisitions followed by **Chartfield Approval** requisitions. Thus, you must approve both the amount and chartfield for each requisition. First, click the **blue requisition number link** for amount approvals.

3. The blue requisition number link will take you to the **Amount Approval Page**. Click the **Save** button to approve the requisition amount. Find the yellow **Return to Worklist** button at the bottom of the page. Clicking this button will take you back to the Worklist.

4. Next, find the **Chartfield Approval** for the requisition. It should be on the list after the Amount Approvals. Click on the blue requisition number link for chartfield approvals. This will take you to the Chartfield approval page. Click the **Save** button to approve the requisition chartfields.

5. Finally, you must **Budget Check** the requisition. Record or **copy** the requisition number. The requisition number is listed near the top of the page. Use your mouse to highlight the number(left click, hold and move pointer across numbers to be copied). Next, with the pointer over the highlighted area, right click your mouse and select “copy”.

6. In the **Menu** click on **Purchasing**, then **Requisitions**, then **Maintain Requisitions.** Click on the **Find an Existing Value** tab. Enter or paste (right click the mouse and select “paste”) the requisition number in the **Requisition ID** field to open the requisition page.

7. Locate and click on the **Budget Check** icon at the top right side of the page. Budget status should change from “not check” to “valid”. Note the requisition must be Approved before it can be budget checked.