Final Approvers Checklist

Navigation: *Home Page → Worklist Link*

Note: PeopleSoft has many ways to approve items. The worklist is recommended. If you do not use the worklist to approve requests, the requests will remain in the worklist after they are approved and will need to be removed manually.

1. Click the link you wish to approve.

2. Approval Action – There are three choices.

    a. Approve – Approves the action.
    b. Deny – Denies the action.
    c. Recycle **–** Allows you to type in comments and route back to the creator.

3. You can check the accounting distribution of the costs below. If there is more than one line, click View All to see them. If there needs to be a change in the accounting information, you can:

    a. Click Recycle and send the PO back to the enterer to change the distribution as stated in the Comments section; or

    b. Use ‘Maintain Distributions’ to change the accounting information yourself. See below.

    c. Get a preview of how the dispatched purchase order will look by clicking the ‘View Printable PO’ button. More details below.

<u>MAINTAIN DISTRIBUTIONS</u> Navigation: *Purchasing > Purchase Orders > Maintain Distributions*

1. Enter the PO number or click Search.

2. Click on the blue link of the PO that requires accounting information changed. It will take you to the **Maintain Distributions** page.

3. **As long as the status is not “dispatched,”** you can change any of the accounting information on this page.

4. Click Save.

5. Because there is no Budget Check icon on this screen, <u>budget check through the navigation menu</u>: *Purchasing > Purchase Orders > Budget Check.*

VIEW PRINTABLE PO BEFORE DISPATCHING

1. Click the View Printable PO button in the Amount Approval screen to see what the PO will look upon dispatching.

2. You will be taken to the Process Monitor screen where you look at the process just as if you were actually dispatching the PO.

3. The purchase order will appear so you can check the layout and descriptions. You will notice that it says “PENDING APPROVAL” at the top of the page and “Unauthorized” at the bottom where the approver’s name usually appears.

4. Close the new screen with the Process Monitor and go back to the Amount Approval screen. Be sure to approve the PO before it can actually be dispatched.

5. This button is available for initial approvers also.