

Final Approvers Checklist

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Note: PeopleSoft has many ways to approve items. Using the worklist link here 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. A screen taking you to the Amount Approval page will appear.



2. Approval Action – There are three choices. We will go into them in more detail later on.
 - a. Approve – Approves the purchase order as is.
 - b. Deny – Stops further processing of the purchase order.
 - c. Recycle – Allows you to type in comments and route back to the Buyer.

The default action is “Approve.” If you are simply approving the PO, click the **SAVE button on that screen, then go on to the next one.**

3. To get more information about the purchase order you are approving, you can also click on the arrow by **Lines** to see all the line items.
4. 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 should:
 - a. Click Recycle and send the PO back to the Buyer to change the distribution according to the instructions you will enter in the Comments section of that screen.
5. If you like, you can get a preview of how the dispatched purchase order will look by clicking the **View Printable PO** button. Instructions on how are below.

Using the “Recycle” Option

If there is something wrong with the purchase order, such as the wrong vendor, quantity, or accounting information, please use the Recycle option on this page to send a notice to the Buyer of the need for correction. By entering what needs to be changed in the Comments section (see the example below), the Buyer will receive an email stating what needs to be fixed. The Recycle action also removes this purchase order from the Approver’s Worklist until it is sent for approval the second time.

Purchase Order Amount Approval

Unit: 80100 PO ID: 0000014073 Vendor: 0000001263 L & F LAND MANAGEMENT 006

*Approval Action: Recycle Approval Status: In Process View Printable PO

Comment

Please change the Department ID to 5200 and the account number to 535015.

PO Amount

If the Approver wants these changes made, but notifies the Buyer in person rather than using the Recycle action, this item will hang out on the Worklist.

Using the “Deny” Option

This option is available, but should be used rarely. Denying approval of the purchase order will create an email to the Buyer notifying them that the PO was denied. The Approver should enter the reasons for denial in the Comments section. No further processing can be done on a denied PO – it can only be closed thereafter.

If the denied PO still shows up on the Worklist, the Approver can simply click the “Worked” button to remove it from the list.

VIEW PRINTABLE PO BEFORE APPROVING

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.