

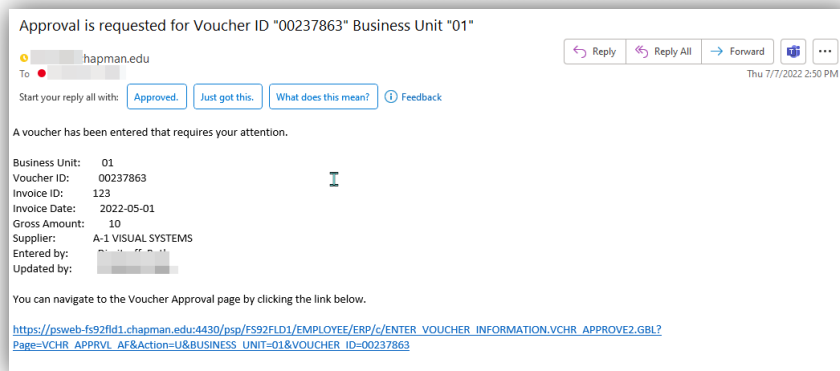
Peoplesoft Fluid Approvals and Out of Office Delegation

| | |
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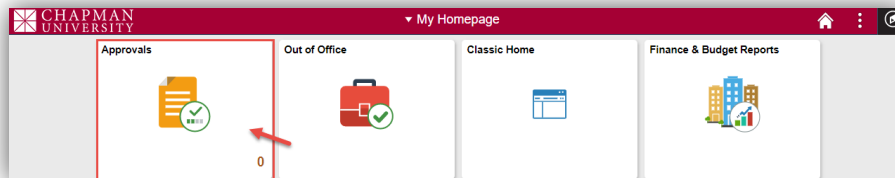
Two methods to approve items in Peoplesoft

1. Email - Approvers will receive an approval email request with a link to approve. The link will take you into the approval page for the specific item.
2. Approval Tile (worklist in classic Peoplesoft)
 - All users with workflow approval security roles will have the tile on your Homepage
 - Tile displays the number of pending approvals
 - Lists all pending approvals and ability to review by type (voucher, requests...)

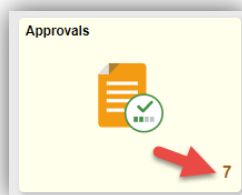
Approval Email



Approvals Tile

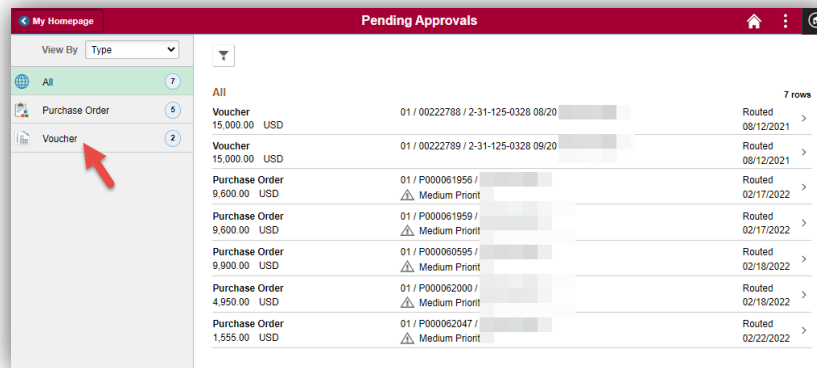


Approvals Tile displays the number of pending approvals

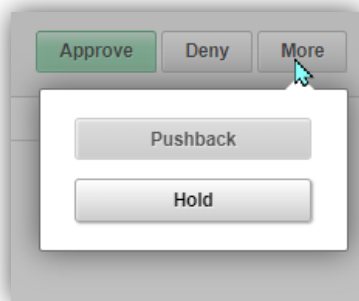


Pending Items Listing and Approvals

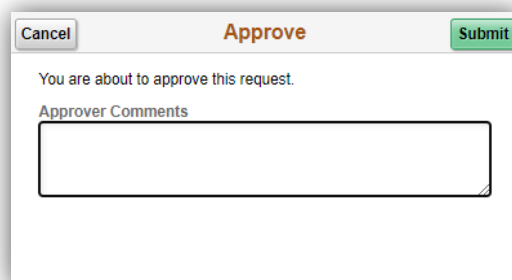
- The default view displays all pending approvals.
- Click on one of the types on the left hand pane to filter the approvals by type (optional)
- Select an item to approve.



After selecting an item, click the Approve button to approve the item. You can also click Deny and terminate the workflow or More to Pushback to previous level or Hold.



Click Submit to approve the item. Comments are optional



View Additional Information – attachments, chartfields and approval chain

Voucher

Chartfields – Click the carrot next to the Line Amount field to view chartfields

Attachments – click View Attachments

Approval Chain – click to view approval history and required approvals

15,000.00 USD

Approve

Deny

More

Summary

Business Unit 01

Invoice Number

Supplier Name 1 800 GOT JUNK

Due Date 03/31/22

Voucher Source Online

Voucher ID 00237859

Created By

Modified By

Invoice Date 03/01/22

Voucher Style Regular Voucher

Line Details

| Voucher Line | Item | Description | Quantity | UOM | Unit Price | Amount |
|--------------|------|-------------|----------|-----|------------|---------------|
| 1 | | | 0 | | 0.00 USD | 15,000.00 USD |

View Attachments (1)

Approver Comments

Approval Chain

Distributions

Fluid Approval Distribution

Line 1

Description

Merchandise Amt 15,000.00 USD

Quantity

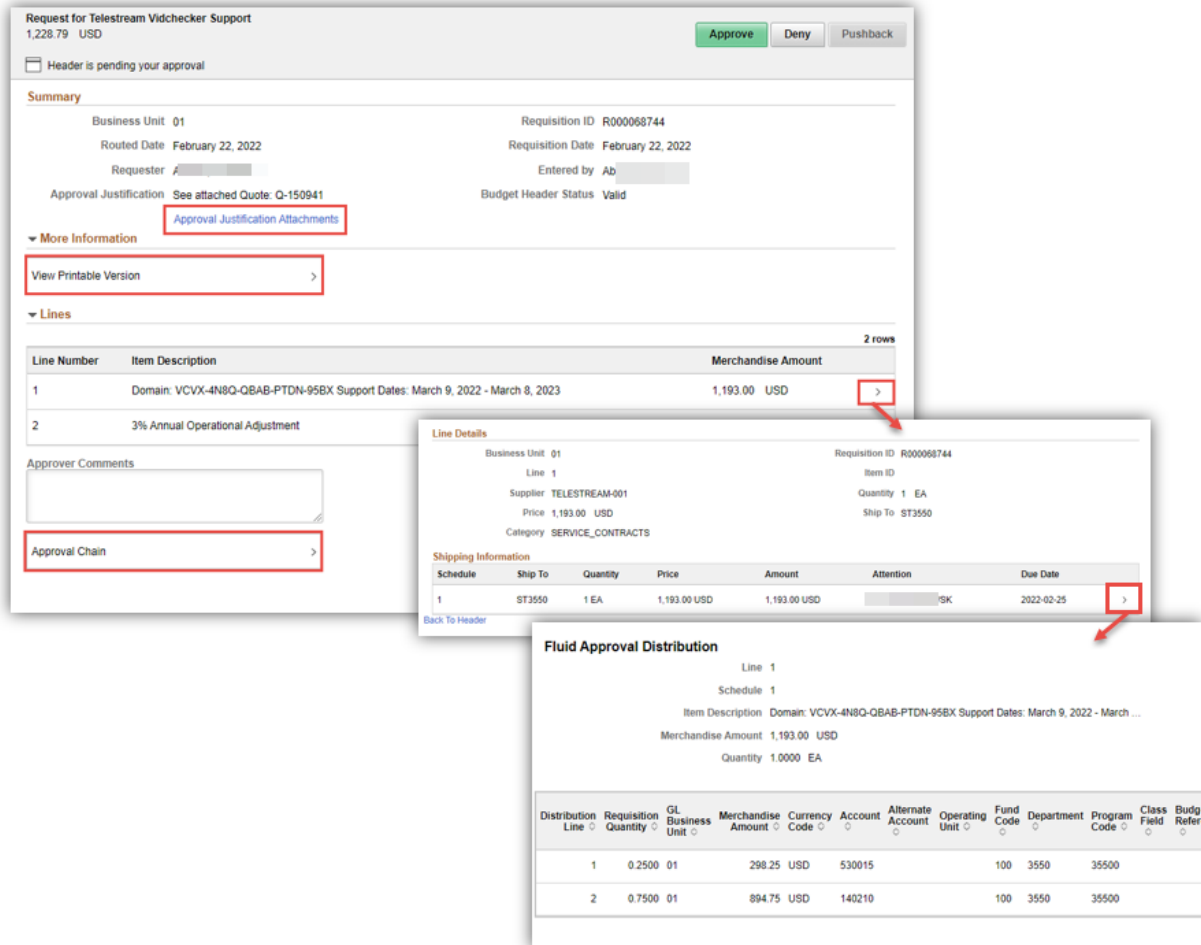
| Distribution Line | Quantity | GL Business Unit | Merchandise Amount | Currency | *Account | Alternate Account | Operating Unit | Fund Code | Department | Program Code | Class Field | Budget Referen |
|-------------------|----------|------------------|--------------------|----------|----------|-------------------|----------------|-----------|------------|--------------|-------------|----------------|
| 1 | | 01 | 15000.00 | USD | 517005 | | | 115 | 6734 | 69002 | | |

Requisition

Attachments – click Approval Justification Attachments hyperlink

Chartfields – click View Printable Version to view chartfields or click the carrot next to the Line Amount field and drill down to the chartfields

Approval Chain – click to view approval history and required approvals



Request for Telestream Vidchecker Support
 1,228.79 USD

[Approve](#) [Deny](#) [Pushback](#)

Header is pending your approval

Summary

Business Unit 01 Requisition ID R000068744
 Routed Date February 22, 2022 Requisition Date February 22, 2022
 Requester [Redacted] Entered by Ab [Redacted]
 Approval Justification See attached Quote: Q-150941 Budget Header Status Valid
[Approval Justification Attachments](#)

▼ **More Information**

[View Printable Version](#) >

▼ **Lines**

2 rows

| Line Number | Item Description | Merchandise Amount |
|-------------|---|--------------------|
| 1 | Domain: VCVX-4N8Q-QBAB-PTDN-95BX Support Dates: March 9, 2022 - March 8, 2023 | 1,193.00 USD > |
| 2 | 3% Annual Operational Adjustment | |

Approver Comments

[Approval Chain](#) >

Line Details

Business Unit 01 Requisition ID R000068744
 Line 1 Item ID
 Supplier TELESTREAM-001 Quantity 1 EA
 Price 1,193.00 USD Ship To ST3550
 Category SERVICE_CONTRACTS

Shipping Information

| Schedule | Ship To | Quantity | Price | Amount | Attention | Due Date |
|----------|---------|----------|--------------|--------------|-----------|--------------|
| 1 | ST3550 | 1 EA | 1,193.00 USD | 1,193.00 USD | OK | 2022-02-25 > |

[Back To Header](#)

Fluid Approval Distribution

Line 1
 Schedule 1
 Item Description Domain: VCVX-4N8Q-QBAB-PTDN-95BX Support Dates: March 9, 2022 - March ...
 Merchandise Amount 1,193.00 USD
 Quantity 1.0000 EA

| Distribution Line | Requisition Quantity | GL Business Unit | Merchandise Amount | Currency Code | Account | Alternate Account | Operating Unit | Fund Code | Department | Program Code | Class Field | Budg Refer |
|-------------------|----------------------|------------------|--------------------|---------------|---------|-------------------|----------------|-----------|------------|--------------|-------------|------------|
| 1 | 0.2500 | 01 | 298.25 | USD | 530015 | | 100 | 3550 | 35500 | | | |
| 2 | 0.7500 | 01 | 894.75 | USD | 140210 | | 100 | 3550 | 35500 | | | |

Purchase Order

Attachments – click View Comments and Attachments

Chartfields – click View Printable Version to view chartfields or click the carrot next to the Line Amount field and drill down to the chartfields

Approval Chain – click to view approval history and required approvals

STEVEN HYNES AND ASSOCIATES INC
1,555.00 USD

[Approve](#)
[Deny](#)
[More](#)

☐ Header is pending your approval

Summary

Supplier STEVEN HYNES AND ASSOCIATES INC
PO ID P000062047
PO Date 02/22/22
Buyer

PO Total 1,555.00 USD
Status Pend Appr
Business Unit 01
Routed Date 02/22/22
Budget Status Valid
[Edit Purchase Order](#)

More Information

View Comments and Attachments >

View Printable Version >

Lines

| Line Number | Item Description | Merchandise Amount |
|-------------|--|--------------------|
| 1 | Remove existing carpet & pad . Install new carpet & pad 136 W. Rose Ave. | 1,555.00 USD |

Approver Comments

Approval Chain >

Line Details

Line 1

Receiving Required Required

Item

Quantity 1 LT

Price 1,555.00 USD

Amount 1,555.00 USD

Shipping Information

| Schedule | Ship To | Quantity | Price | Amount | Attention | Due Date |
|----------|---------|----------|--------------|--------------|-------------------------------|------------|
| 1 | ST1780 | 1 LT | 1,555.00 USD | 1,555.00 USD | View Comments | 2022-02-23 |

PO Distribution Information

Fluid Approval Distribution

Line 1

Schedule 1

Item Description Remove existing carpet & pad . Install new carpet & pad 136 W. Rose Ave.

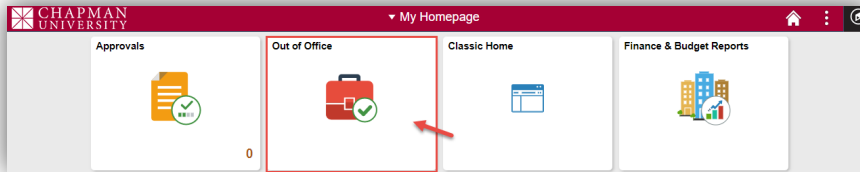
Merchandise Amt 1,555.00 USD

Quantity 1.0000 LT

| Distribution Line | Purchase Order Quantity | Merchandise Amount | Currency Code | GL Business Unit | Attention To | Account | Alternate Account | Operating Unit | Fund Code | Department |
|-------------------|-------------------------|--------------------|---------------|------------------|----------------------|-----------|-------------------|----------------|-----------|------------|
| 1 | 1.0000 | 1555.00 | USD | 01 | <input type="text"/> | as 530035 | | 170 | 1820 | |

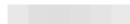
Out of Office Delegations

Out of office delegations should be used for temporary out of office periods. Peoplesoft approvals will route to the alternate approver for the specified date range.



- Click the OOO Tile or Navigate – Navigator or Classic home/My System Profile
- Enter the Alternate UserID and the From/To Dates
- Click Save
- Note the Alternate user/Delegate must have the appropriate security roles to approve transactions

General Profile Information



Password

[Change password](#)

[Change or set up forgotten password help](#)

Personalizations

My preferred language for PIA web pages is: English

My preferred language for reports and email is: English

Currency Code: USD

Default Mobile Page:

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

| | | |
|-------------------|----------------------|----------------------------------|
| Alternate User ID | <input type="text"/> | <input type="button" value="Q"/> |
| From Date | <input type="text"/> | (example: 12/31/2000) |
| To Date | <input type="text"/> | (example: 12/31/2000) |

Workflow Attributes

☐ Email User ☐ Worklist User

Miscellaneous User Links

Email

| Primary Email Account | Email Type | Email Address | | |
|-------------------------------------|------------|----------------------|----------------------------------|----------------------------------|
| <input checked="" type="checkbox"/> | Work | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

IM Information

| Protocol | XMPP Domain | UserID | Password | | |
|----------|----------------------|----------------------|----------------------|----------------------------------|----------------------------------|
| XMPP | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |