



Instructions for Approving Transactions Using PeopleSoft Financials

Approving Expense Reports

1. Log into [PeopleSoft Financials](#).
2. Select the **NavBar** (compass) icon.
3. Select the **Navigator** icon.
4. Select **Worklist** in the menu list.
5. Select **Worklist** in the next menu list.
6. Your approval worklist will be displayed. All expense reports will be noted as *ER Approval*. You may also see ePRO requisitions here as well. If you do, it is fine to approve them from this worklist.
7. Click on the blue link to open the transaction to review and approve.
8. Verify the following information on the expense report:
 - a. **Chartstring Information** – this is available through the **Accounting Defaults** link
 - b. **Expense Type** – click on each **Expense Type** to see view additional details related to the expense
 - c. **Receipts** – verify receipts through the **Attachments** link
 - d. **Pending Actions** and **Action History** – review who has already approved the transaction (action history) and who will review it next (pending actions)
 - e. **Comments** – enter any needed comments
 - f. **Budget Status** – verify that budget status is *Valid*. If budget status reflects an *Error*, the report cannot be approved until the budget error is cleared. If the budget status reflects *Not Checked*, the budget check process has not run yet. Wait a few hours to allow the budget check process to run and then attempt to approve if valid.
9. Select the appropriate approver action:
 - a. **Approve** – approves the transaction and moves it onto the next approver.
 - b. **Send Back** – sends the transaction back to the traveler for changes or corrections.
 - c. **Hold** – overrides the eight-day workflow escalation process and holds the transaction in the approver's Worklist.
 - d. **Deny** – completely denies the transaction and the employee will not be able to resubmit the transaction without re-entering the report. An approver may also elect to deny certain lines rather than the entire report.



Approving ePRO Requisitions

1. Log into [PeopleSoft Financials](#).
2. Select the **NavBar** (compass) icon.
3. Select the **Navigator** icon.
4. Select the **Manager Self-Service** menu link.
5. Select the **Procurement** menu link.
6. Select the **Manage Approvals** menu link.
7. Delete any dates that populate in the **Date From** or **Date To** fields. The **Status** should reflect *Pending*.
8. The requisitions requiring approval will be listed in the bottom section of the page. Click on the blue **Req ID** to open the requisition to review and approve.
9. Verify the following information on the requisition:
 - a. **Item Description, Supplier, Quantity and Price** – click on the **Item Description** link to review details regarding the requested item.
 - b. **Chartstring Information** – click on the **View Line Details** button to see the chartstring for all lines on the requisition
 - c. **Approval Path** – click on the **Expand** icon next to **Review/Edit Approvers** to see the previous approvals and the future approvals. The green plus sign (+) can be used to insert an ad-hoc approver.
 - d. **Requester's Comments** – click on the **Call Out** icon to read comments entered by the requester.
 - e. **Approver Comments** – approver has the ability to enter any necessary comments.
10. Select the appropriate approver action:
 - a. **Approve** - approves the transaction and moves it onto the next approver.
 - b. **Deny** – Sends the entire requisition back to the requester for correction or cancellation.