



Instructions for Approving Transactions Using PeopleSoft Financials

Approving Expense Reports

1. Navigate to the [GeorgiaFIRST Financials webpage](https://www.usg.edu/gafirst-fin/) (<https://www.usg.edu/gafirst-fin/>)
2. Select the **GeorgiaFIRST Self-Service button**.
3. If prompted, select the **GoWest** shield logo.
4. Login using your **UWG Username** and **Password**.
5. You will be prompted to dual authenticate using the Duo authentication method previously established.
6. From the PeopleSoft Financials homepage, select the **NavBar** (compass) icon.
7. Select the **Navigator** icon.
8. Select **Worklist** in the menu list.
9. Select **Worklist** in the next menu list.
10. Your approval worklist will be displayed. All expense reports will be noted as *ER Approval*.
11. Click on the blue link to open the expense transaction to review and approve.
12. 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.
13. 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. Navigate to the [GeorgiaFIRST Financials webpage](https://www.usg.edu/gafirst-fin/) (<https://www.usg.edu/gafirst-fin/>)
2. Select the **GeorgiaFIRST Self-Service button**.
3. If prompted, select the **GoWest** shield logo.
4. Login using your **UWG Username** and **Password**.
5. You will be prompted to dual authenticate using the Duo authentication method previously established.
6. From the PeopleSoft Financials homepage, select the **NavBar** (compass) icon.
7. Select the **Navigator** icon.
8. Select **Worklist** in the menu list.
9. Select **Worklist** in the next menu list.
10. Your approval worklist will be displayed. All requisitions will be noted as a *Requisition*.
11. Click on the blue link to open the requisition to review and approve.
12. 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. Ensure the description clearly identifies the item being requested.
 - 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.
13. 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.