



Indiana Department of Administration | Procurement Division

PEOPLESFT
FINANCIALS 92

Approving Purchase Orders

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Approving Purchase Orders through email notifications

Navigation

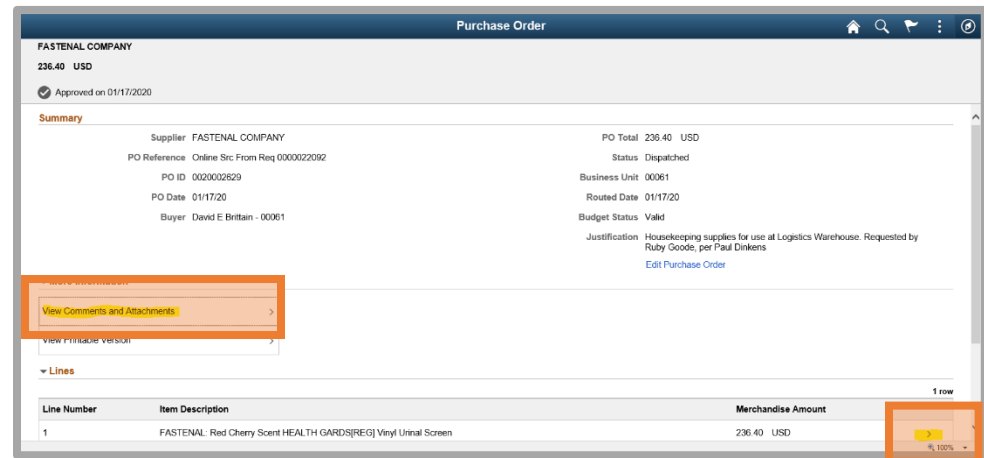
From the email you received informing you there is a Purchase Order awaiting your approval, click on the included link. You may need to log into Peoplesoft to access the Purchase Order.

View Comments and Attachments (header)

Peoplesoft will open the purchase order, where you can review the justification, buyer, line items, and additional information included on the PO.

You may click the **View Comments and Attachments** section if you want to see any comments or attachments linked to the header of the purchase order.

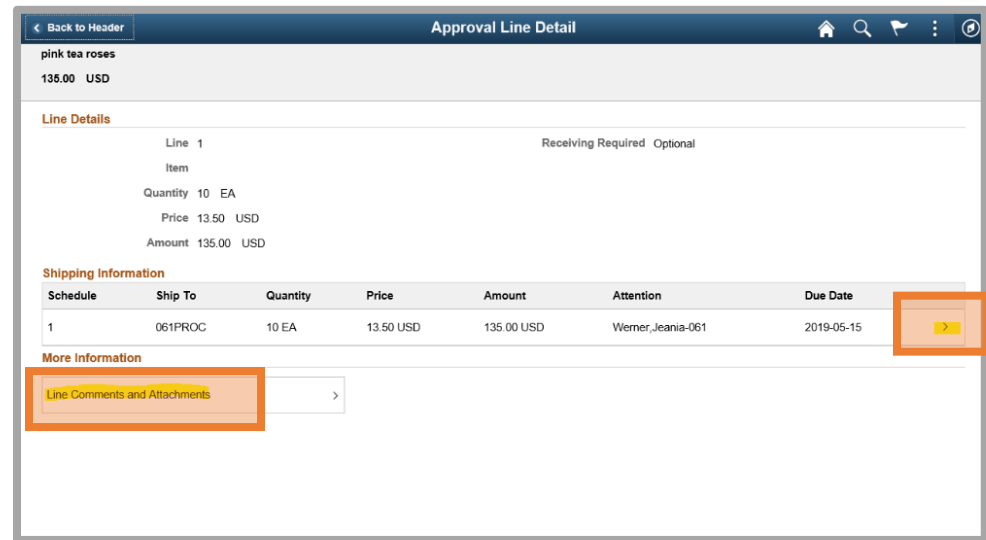
When you are finished reviewing the information included on the page, click on the arrow (>) at the end of the first row under Lines.



Line Details

If there are comments or attachments associated with that line, you can click **Line Comments and Attachments** to view them.

Click the arrow (>) at the end of the Shipping Information row to view chartfields entered for that line.

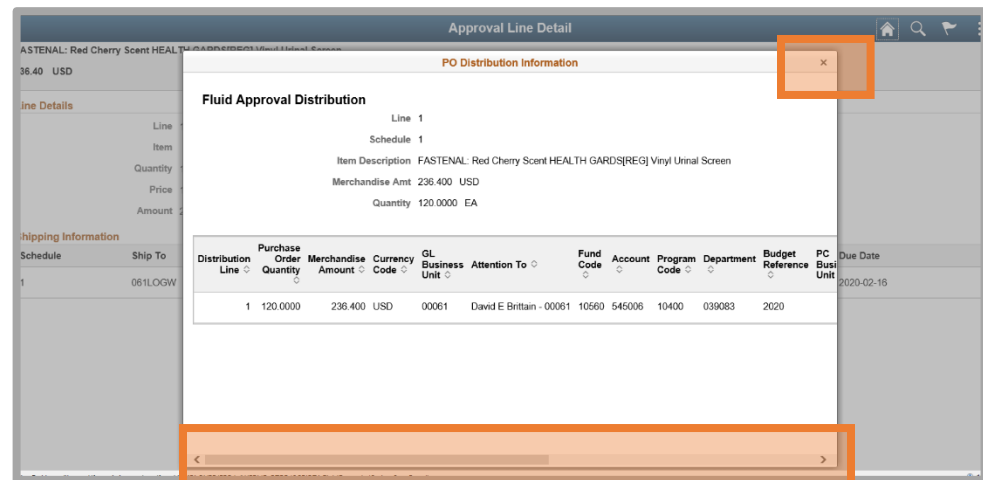


Chartfields on Lines

A new window will open containing the Item Description and the chartfields entered for that line.

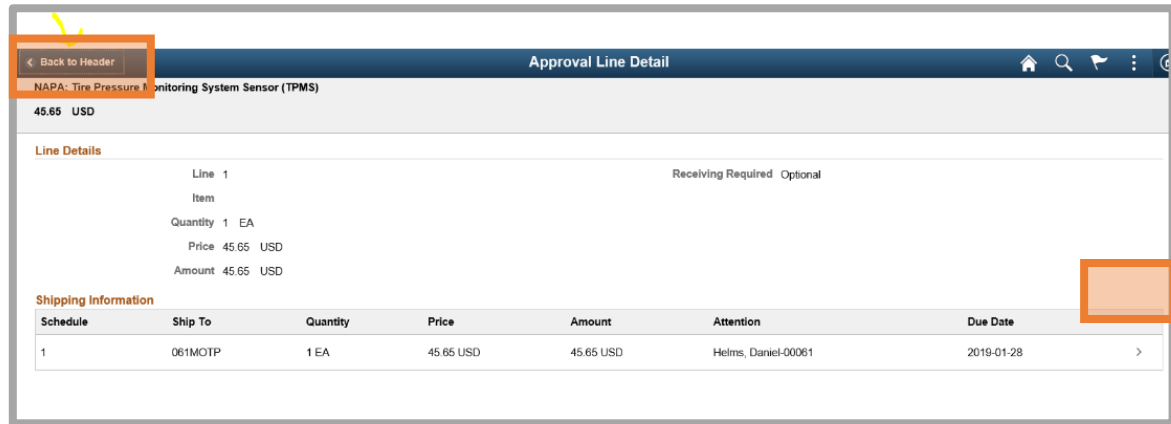
Use the scroll bar to view all chartfields, if needed.

When you have finished reviewing the information, click the X in the top right corner of that window.



Click the **Back to Header** button in the top left corner.

If there are multiple lines on the Purchase Order, click the arrow (>) at the end of each line to review chartfields.



Approver Comments and Approval Chain

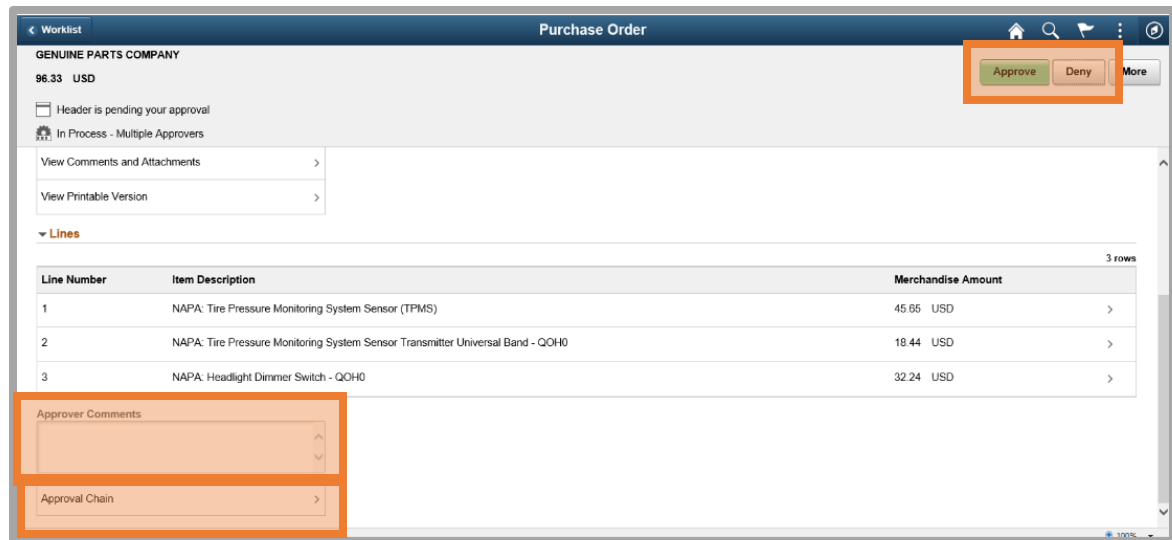
You may wish to add **Approver Comments** in the provided area.

If you want to view the **Approval Chain** for this Purchase Order, click Approval Chain.

When you have finished reviewing the PO information, click **Approve** or **Deny**.

If you are denying the PO, you will be required to enter a comment.

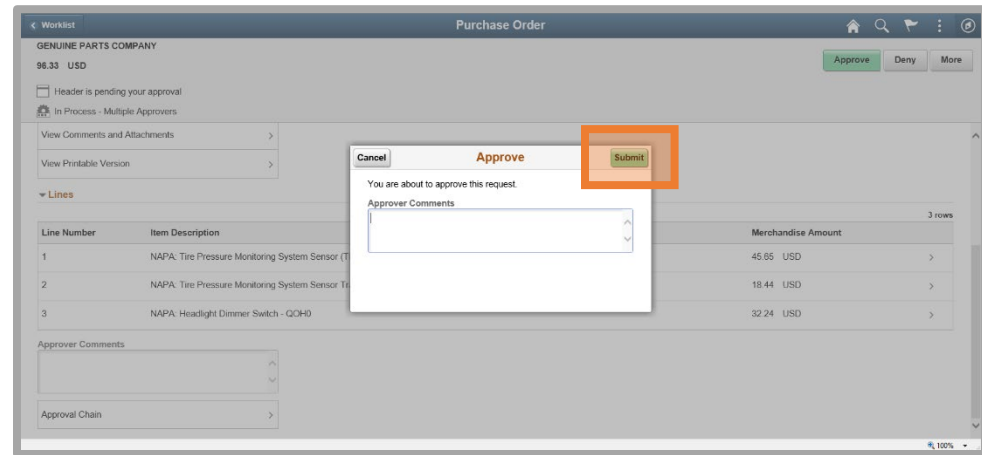
If you are approving the PO, you may choose to enter a comment, but it is not required to proceed.



Once you click **Approve** or **Deny**, a new window will open.

This box gives you another opportunity to add comments.

Click **Submit**.

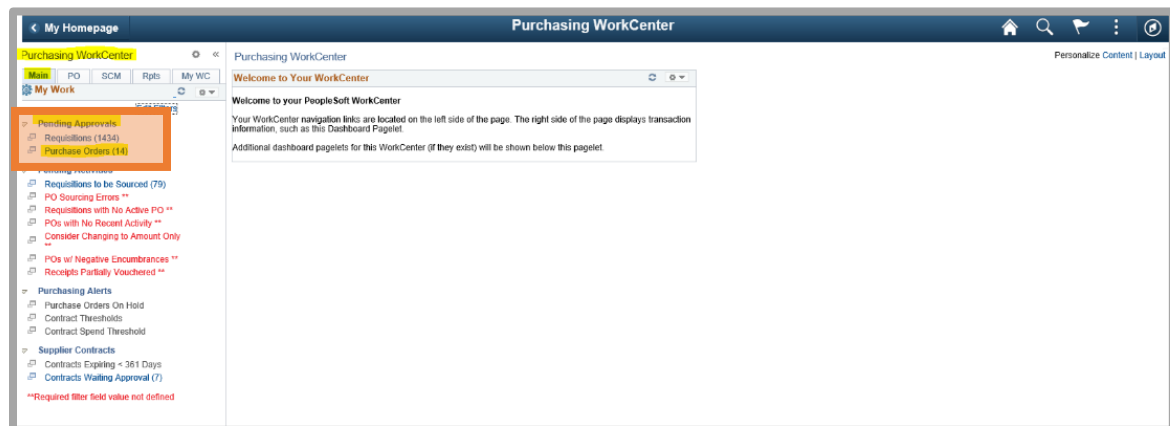


Approving Purchase Orders through WorkCenter Pending Approvals

Navigation

You can access Purchase Orders that require your approval through the Purchasing WorkCenter Main tab.

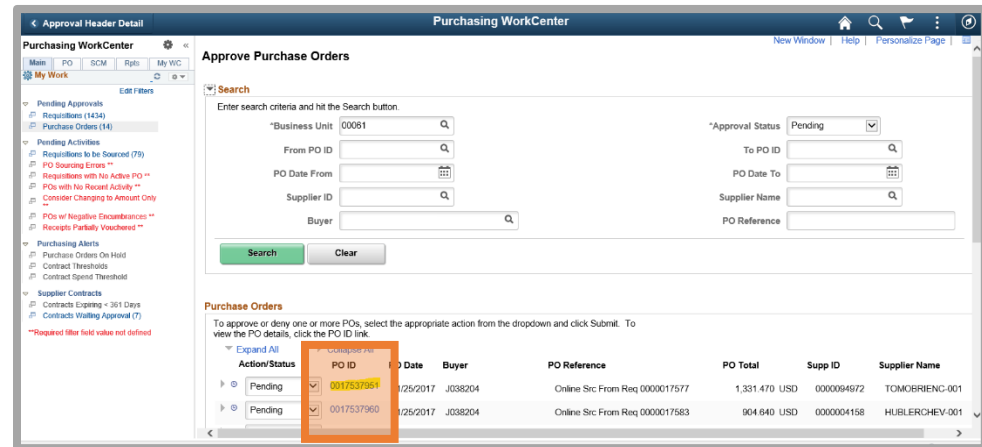
Click on Purchase Orders under **Pending Approvals**.



All Purchase Orders requiring your approval will be listed.

Business Unit and Approval Status should default. If not, you will need to enter your Business Unit and Pending as the Approval Status, and click **Search**.

Click on the blue PO ID link of the Purchase Order you are reviewing for approval.

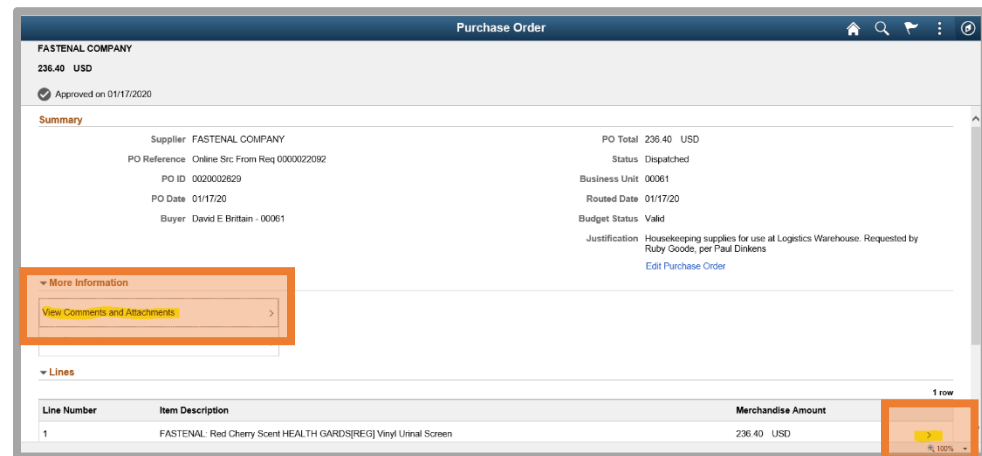


View Comments and Attachments (header)

Peoplesoft will open the purchase order, where you can review the justification, buyer, line items, and additional information included on the PO.

You may click the **View Comments and Attachments** section if you want to see any comments or attachments linked to the purchase order.

When you are finished reviewing the information included on the page, click on the arrow (>) at the end of the first row under Lines.



Line Details

If there are comments or attachments associated with that line, you can click **Line Comments and Attachments** to view them.

Click the arrow (>) at the end of the Shipping Information row to view chartfields entered for that line.

The screenshot shows the 'Approval Line Detail' window for 'pink tea roses' with a total amount of 135.00 USD. The 'Line Details' section shows 'Line 1' with 'Receiving Required' set to 'Optional'. The 'Shipping Information' table is as follows:

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	061PROC	10 EA	13.50 USD	135.00 USD	Werner,Jeania-061	2019-05-15

Below the shipping information is a 'More Information' section with a button labeled 'Line Comments and Attachments' and a right-pointing arrow. A yellow box highlights this button. Another yellow box highlights the right-pointing arrow at the end of the shipping information row.

Chartfields on Lines

A new window will open containing the Item Description and the chartfields entered for that line.

Use the scroll bar to view all chartfields, if needed.

When you have finished reviewing the information, click the **X** in the top right corner of that window.

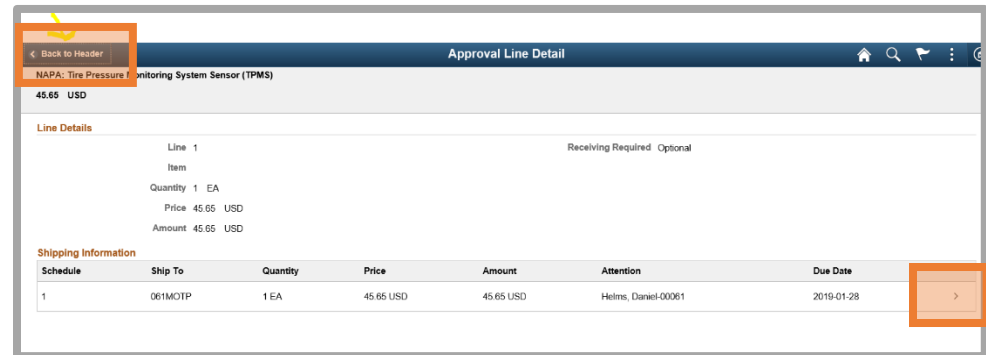
The screenshot shows the 'Approval Line Detail' window with a 'PO Distribution Information' pop-up window open. The pop-up window title is 'Fluid Approval Distribution' and it shows 'Line 1' with 'Schedule 1'. The item description is 'FASTENAL: Red Cherry Scent HEALTH GARD[REG] Vinyl Unnal Screen'. The merchandise amount is 236,400 USD and the quantity is 120,000 EA. Below this is a table of chartfields:

Distribution Line	Purchase Order Quantity	Merchandise Amount	Currency Code	GL Business Unit	Attention To	Fund Code	Account	Program Code	Department	Budget Reference	PC Busi Unit	Due Date
1	120.0000	236.400	USD	00061	David E Britain - 00061	10560	545006	10400	039083	2020		2020-02-16

The pop-up window has a close button (X) in the top right corner, highlighted with a yellow box. A yellow box also highlights the horizontal scroll bar at the bottom of the pop-up window.

Click the **Back to Header** button in the top left corner.

If there are multiple lines on the Purchase Order, click the arrow (>) at the end of each line to review chartfields.



Approver Comments and Approval Chain

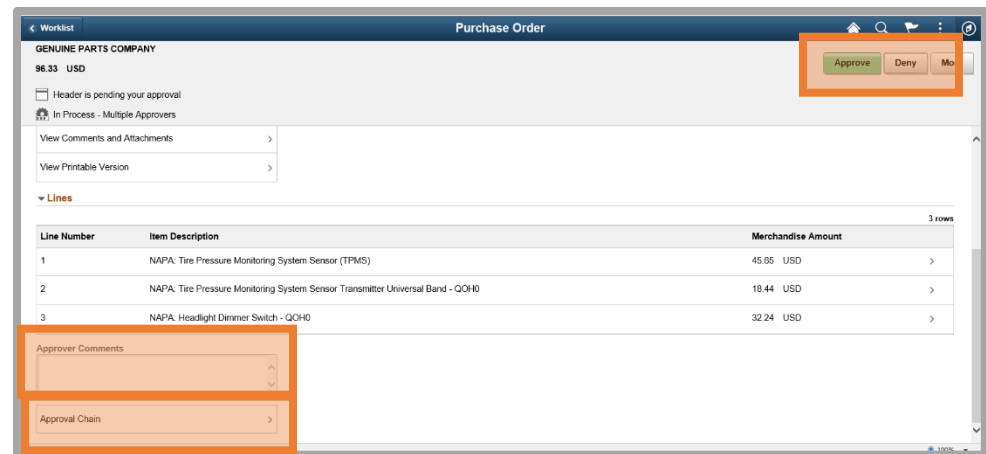
You may wish to add **Approver Comments** in the provided area.

If you want to view the **Approval Chain** for this Purchase Order, click Approval Chain.

When you have finished reviewing the PO information, click **Approve** or **Deny**.

If you are denying the PO, you will be required to enter a comment.

If you are approving the PO, you may choose to enter a comment, but it is not required to proceed.

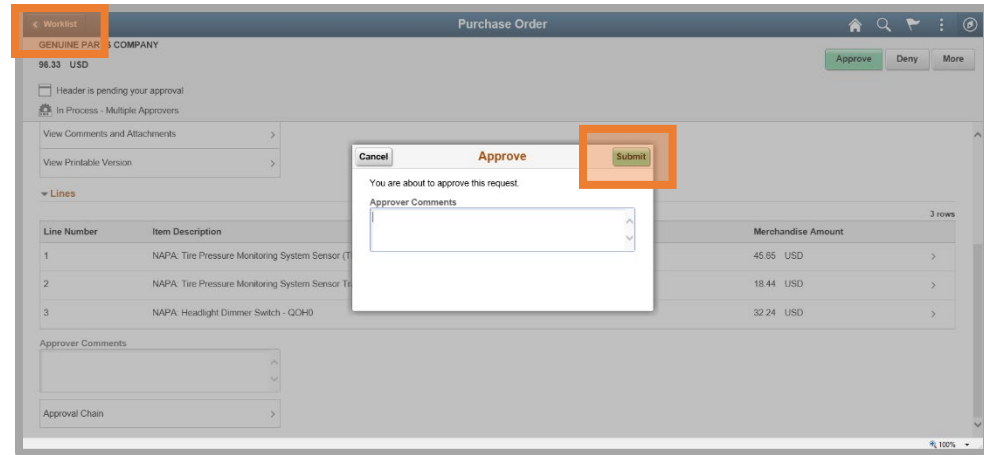


Once you click Approve or Deny, a new window will open.

This box gives you another opportunity to add comments.

Click **Submit**.

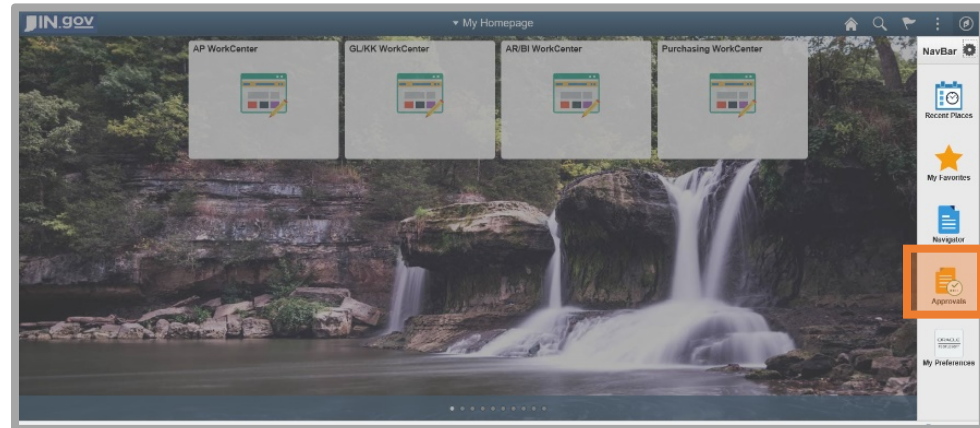
Click **Home** in the top left corner to return to the Purchasing WorkCenter where you can click on Purchase Orders under Pending Approvals on the Main tab.



Approving Purchase Orders through NavBar Approvals

Navigation

You may access Purchase Orders requiring your approval through NavBar>Approvals tile.



- ! You may wish to click on Purchase Order on the left side of your screen so that all you see are
- Purchase Orders awaiting your approval.

Find the Purchase Order you are ready to review and click the arrow (>) at the right end of the row for that Purchase Order.

Pending Approvals			
View By	Type		
All 33 rows			
Purchase Order	904.64 USD	Online Src From Req 0000017583 - 00061 / 0017537960 / Jamie Sisco - 00061 ⚠ Medium Priority	Routed 01/25/2017 >
Purchase Order	1,331.47 USD	Online Src From Req 0000017577 - 00061 / 0017537951 / Jamie Sisco - 00061 ⚠ Medium Priority	Routed 01/25/2017 >
Purchase Order	1,054.80 USD	Online Src From Req 0000020366 - 00061 / 0020000985 / Mishell Gordon-00061 ⚠ Medium Priority	Routed 01/31/2019 >
Requisition	1,074.67 USD	FS-GOODYEAR 1/31/2019 - 00061 / 0000020398 Helms, Daniel-00061 ⚠ Medium Priority	Routed 02/01/2019 >
Requisition	491.16 USD	Rq-Evt- TC -PO comments test - 00061 / 0000020414 Helms, Daniel-00061 ⚠ Medium Priority	Routed 04/18/2019 >
Purchase Order	232.83 USD	Online Src From Req 0000020359 - 00061 / 0020000973 / Mishell Gordon-00061 ⚠ Medium Priority	Routed 04/30/2019 >
Purchase Order	576.06 USD	00061 / 0020001001 / Werner, Jeania-061 ⚠ Medium Priority	Routed 05/01/2019 >
Purchase Order	9,800.00 USD	weed control - 00061 / 0020001003 / Werner, Jeania-061 ⚠ Medium Priority	Routed 05/01/2019 >
Purchase Order	135.00 USD	Online Src From Req 0000020437 - 00061 / 0020001005 / Werner, Jeania-061 ⚠ Medium Priority	Routed 05/02/2019 >
Purchase Order	70.00 USD	00061 / 0020000999 / Werner, Jeania-061 ⚠ Medium Priority	Routed 05/08/2019 >
Purchase Order	83,430.00 USD	Online Src From Req 0000020444 - 00061 / 0020001014 / Jamie Sisco - 00061 ⚠ Medium Priority	Routed 05/09/2019 >

View Comments and Attachments (header)

Peoplesoft will open the purchase order, where you can review the justification, buyer, line items, and additional information included on the PO.

You may click the **View Comments and Attachments** section if you want to see any comments or attachments linked to the purchase order, if available.

When you are finished reviewing the information included on the page, click on the arrow (>) at the end of the first row under Lines.

Purchase Order
FASTENAL COMPANY
236.40 USD
Approved on 01/17/2020

Summary

Supplier: FASTENAL COMPANY	PO Total: 236.40 USD
PO Reference: Online Src From Req 0000022092	Status: Dispatched
PO ID: 0020002629	Business Unit: 00061
PO Date: 01/17/20	Routed Date: 01/17/20
Buyer: David E Brittan - 00061	Budget Status: Valid
Justification: Housekeeping supplies for use at Logistics Warehouse. Requested by Ruby Goode, per Paul Dinkens	

[View Comments and Attachments](#)

Lines

Line Number	Item Description	Merchandise Amount
1	FASTENAL - Red Cherry Scent HEALTH GARDS[REG] Vinyl Urinal Screen	236.40 USD

Line Details

If there are comments or attachments associated with that line, you can click **Line Comments and Attachments** to view them.

Click the arrow (>) at the end of the Shipping Information row to view chartfields entered for that line.

Approval Line Detail
pink tea roses
135.00 USD

Line Details

Line 1	Receiving Required Optional
Item	
Quantity 10 EA	
Price 13.50 USD	
Amount 135.00 USD	

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	061PROC	10 EA	13.50 USD	135.00 USD	Werner, Jeania-061	2019-05-15

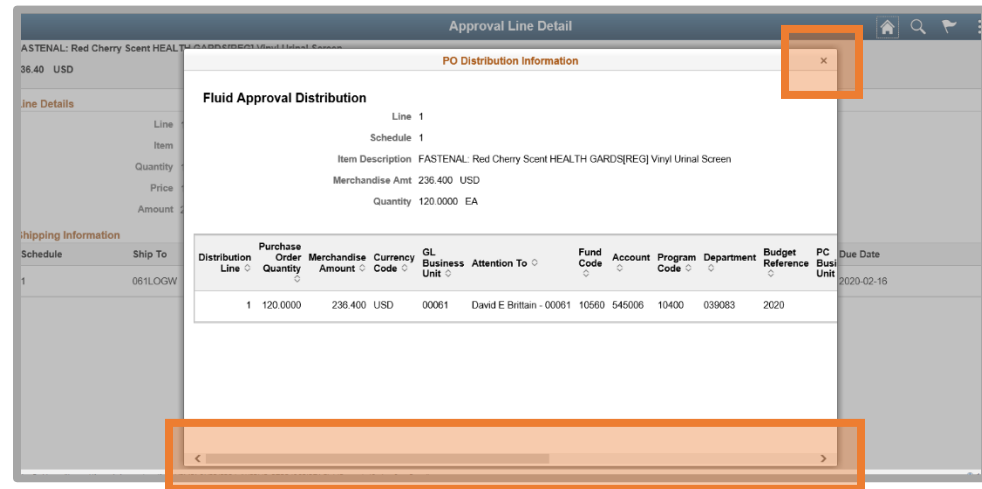
[Line Comments and Attachments](#)

Chartfields on Lines

A new window will open containing the Item Description and the chartfields entered for that line.

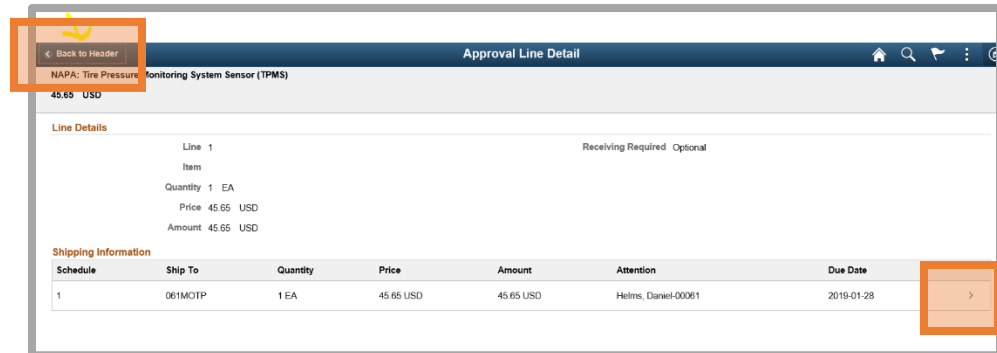
Use the scroll bar to view all chartfields, if needed.

When you have finished reviewing the information, click the **X** in the top right corner of that window.



Click the **Back to Header** button in the top left corner.

If there are multiple lines on the Purchase Order, click the arrow (>) at the end of each line to review chartfields.



Approver Comments and Approval Chain

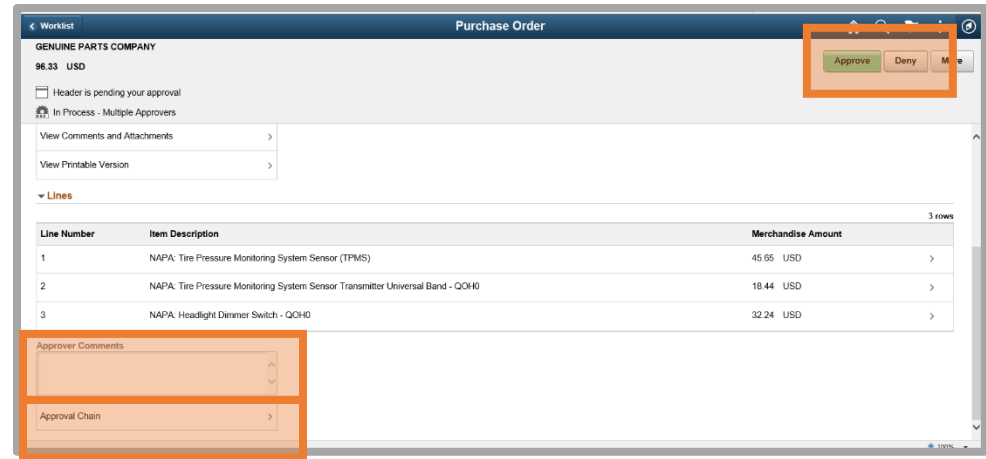
You may wish to add **Approver Comments** in the provided area.

If you want to view the Approval Chain for this Purchase Order, click **Approval Chain**.

When you have finished reviewing the PO information, click **Approve** or **Deny**.

If you are denying the PO, you will be required to enter a comment.

If you are approving the PO, you may choose to enter a comment, but it is not required to proceed.

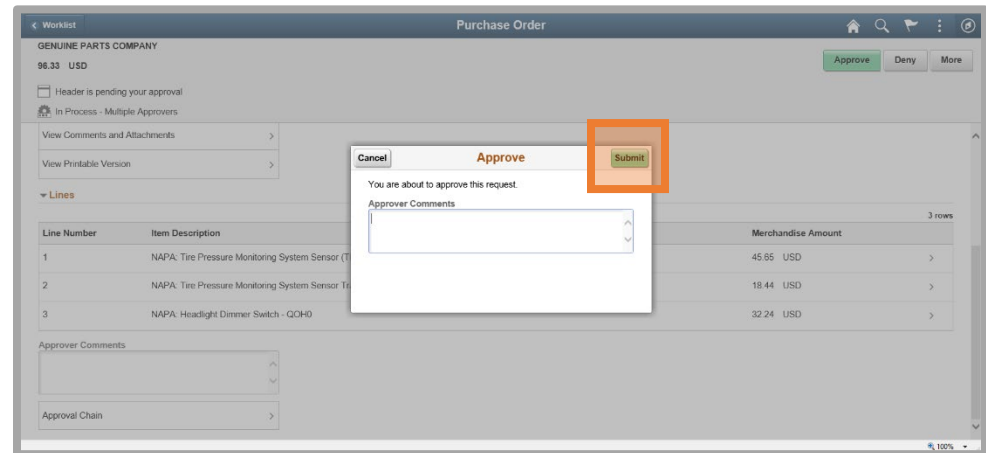


Once you click Approve or Deny, a new window will open.

This box gives you another opportunity to add comments.

Click **Submit**.

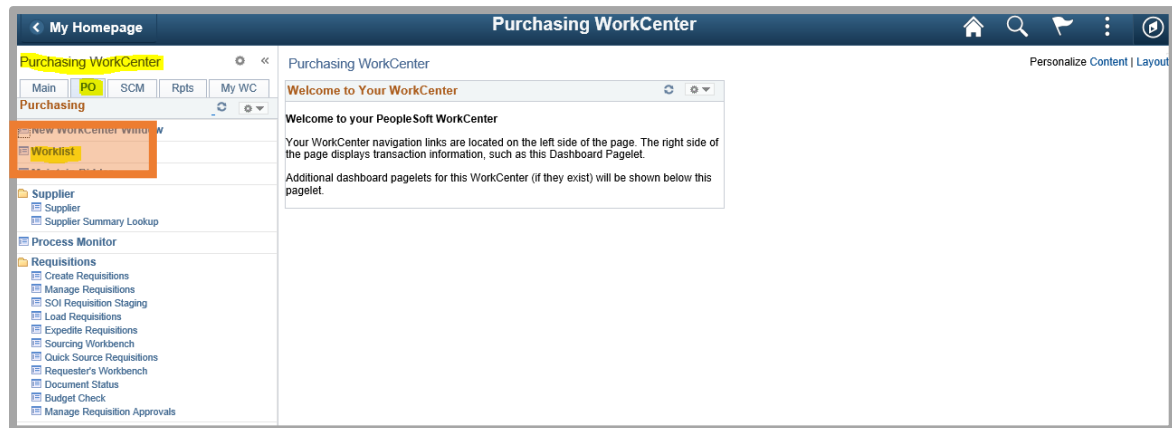
You will be taken back to the Pending Approvals page.



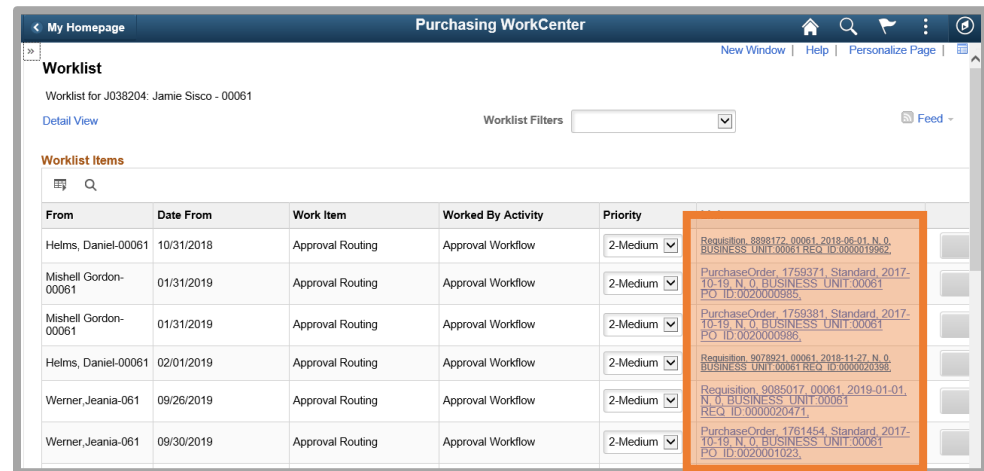
Approving Purchase Orders through WorkCenter Worklist

Navigation

From the Purchasing WorkCenter PO tab, click **Worklist**.



Find the Purchase Order you want to review prior to approval and click on the blue link for that Purchase Order.



View Comments and Attachments (header)

Peoplesoft will open the purchase order, where you can review the justification, buyer, line items, and additional information included on the PO.

You may click the **View Comments and Attachments** section if you want to see any comments or attachments linked to the purchase order.

When you are finished reviewing the information included on the page, click on the arrow (>) at the end of the first row under Lines.

Purchase Order
FASTENAL COMPANY
236.40 USD
Approved on 01/17/2020

Summary

Supplier: FASTENAL COMPANY	PO Total: 236.40 USD
PO Reference: Online Sic From Req 0000022092	Status: Dispatched
PO ID: 0020002629	Business Unit: 00061
PO Date: 01/17/20	Routed Date: 01/17/20
Buyer: David E Brittain - 00061	Budget Status: Valid
Justification: Housekeeping supplies for use at Logistics Warehouse. Requested by Ruby Spoke, per Paul Diakera	
Edit Purchase Order	

More Information
View Comments and Attachments >

VIEW IMAGE VERSION

Lines 1 row

Line Number	Item Description	Merchandise Amount
1	FASTENAL: Red Cherry Scent HEALTH GARDS[REG] Vinyl Urinal Screen	236.40 USD

Line Details

If there are comments or attachments associated with that line, you can click **Line Comments and Attachments** to view them.

Click the arrow (>) at the end of the Shipping Information row to view chartfields entered for that line.

Approval Line Detail
pink tea roses
135.00 USD

Line Details

Line 1	Receiving Required: Optional
Item	
Quantity: 10 EA	
Price: 13.50 USD	
Amount: 135.00 USD	

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	061PROC	10 EA	13.50 USD	135.00 USD	Wemer,Jeania-061	2019-05-15

More Information

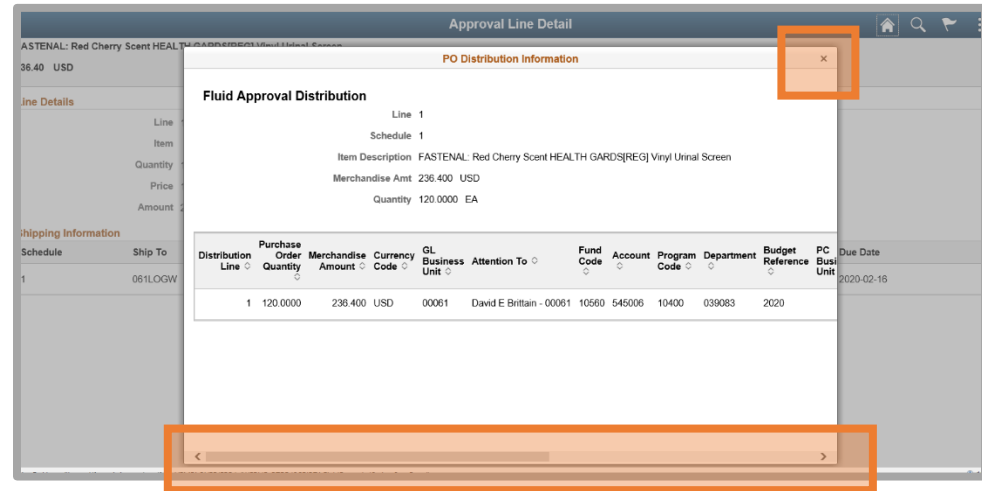
Line Comments and Attachments >

Chartfields on Lines

A new window will open containing the Item Description and the chartfields entered for that line.

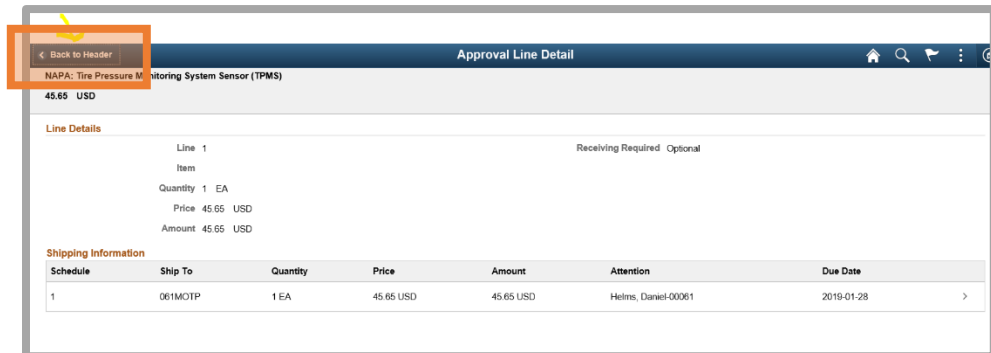
Use the scroll bar to view the chartfields, if needed.

When you have finished reviewing the information, click the **X** in the top right corner of that window.



Click the **Back to Header** button in the top left corner.

If there are multiple lines on the Purchase Order, click the arrow (>) at the end of each line to review chartfields.



Approver Comments and Approval Chain

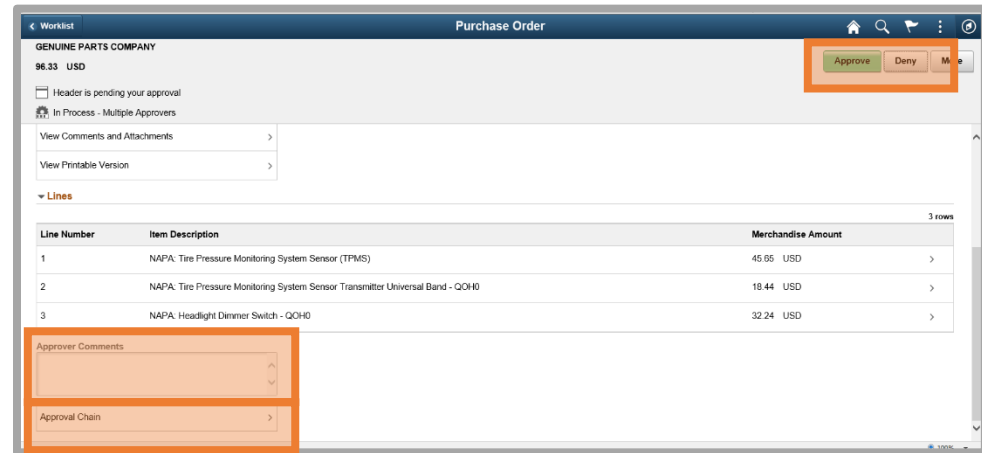
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If you want to view the Approval Chain for this Purchase Order, click **Approval Chain**.

When you have finished reviewing the PO information, click **Approve** or **Deny**.

If you are denying the PO, you will be required to enter a comment.

If you are approving the PO, you may choose to enter a comment, but it is not required to proceed.



Once you click Approve or Deny, a new window will open.

This box gives you another opportunity to add comments.

Click **Submit**.

