PeopleSoft_Financials_Upgrade_to_PUM51_Delta
The Approvals Tile

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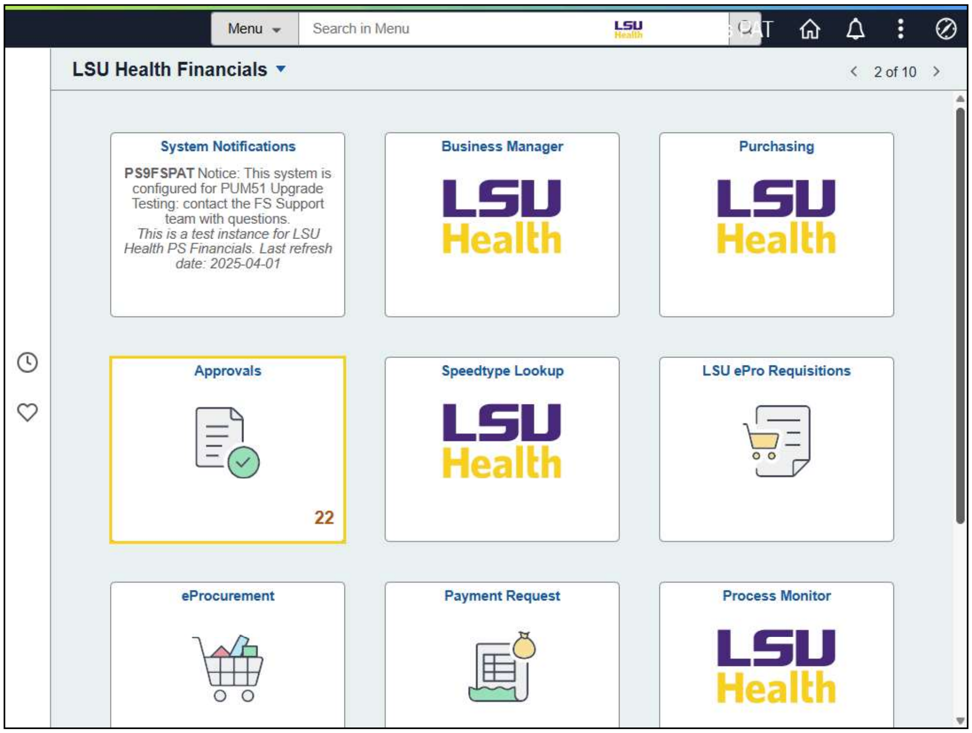
Approvals Tile

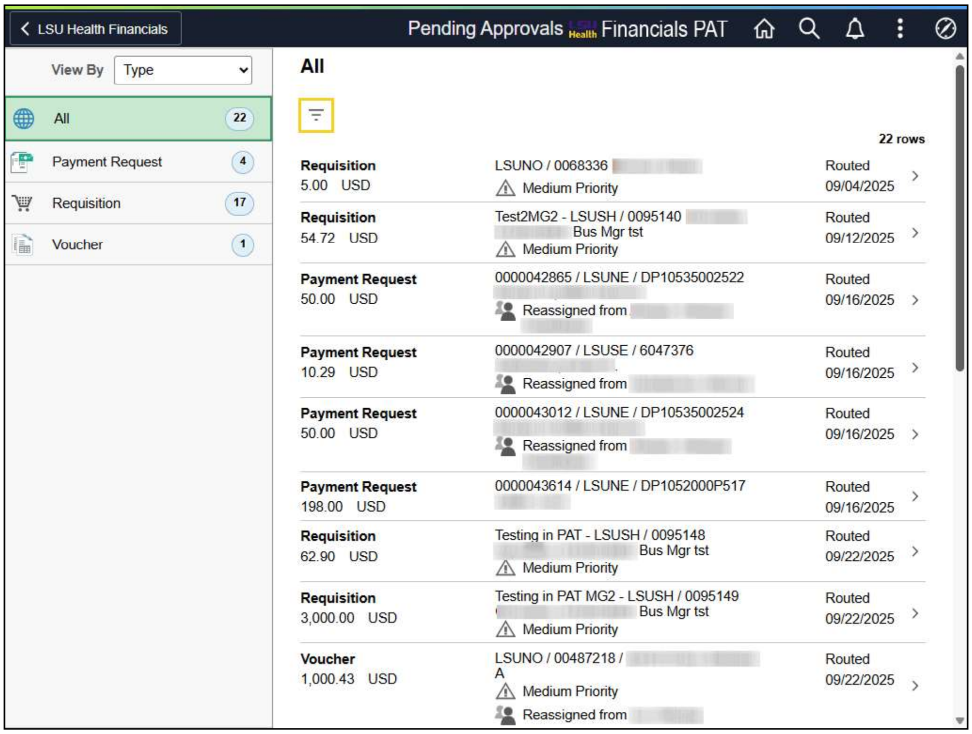
Procedure

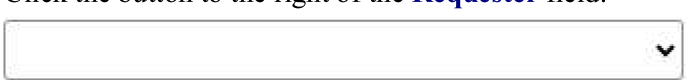
In this topic you will learn how to use the **Approvals Tile**.



Step	Action
1.	Users with appropriate approval security will access the ***Approvals Tile*** from the **LSU Health Financials** homepage. Users will see any *requisitions*, *vouchers*, *payment requests*, *Journals (Shreveport)*, or *GTeForms* pending their approval. Click the **Approvals Tile** button.
2.	The system *defaults* into the *All Type*. In this view, the user will see *all available types* of approvals needing attention. On the *right side* of the button is the *number of approvals by type*. For example, *All* has *22* records to approve. Users may *select* the *Payment Request*, *Requisition* or *Voucher* type to only view approvals for that specific type. Click the **Payment Request** button. 

Step	Action
3.	The user's view is limited to the 4 available Payment Request approvals. Click the **All** button. 



Step	Action
4.	Users may select the ***Filter*** option to *search* for a *specific approval option*. Click the **Filter** button. 
5.	*Next* to *each Filter option* is a *drop-down arrow*. Each option will *display* its *list of options* from which the *user can choose*. In this example, the user will choose ***Barbara Doss*** from the list of ***Requesters***. Click the button to the right of the **Requester** field. 

Step	Action
6.	A list of all those who have an active approval request will display. Click the **Doss, Barbara A** list item.
7.	Click the **Filter** button. 
8.	The lone *Voucher approval request* displays as *Doss, Barbara A* is the *requester*.
9.	The **Approvals Tile** displays ***GTeForms*** *pending approval*. This includes *Internal Transaction Forms, Clincard Requests, and AP Special Meals & Entertainment Requests* that have been submitted for approval.
10.	Due to the *GTeForm special design* for ***Internal Transactions***, the **Approvals Tile** can only be *used after* the *debit chartstring* has been *entered*. The *GTeForm* will *appear* on the **Approval Tile** *even if* the *debit chartstring* has ***not*** been ***entered***.
11.	Use *either* of these *three options* to *approve GTeForm* ***Internal Transactions***: **(1)** use the ***IT GTeForm*** *email link to update the debit chartstring*, then *use* the **Approvals Tile** to *approve*, or **(2)** Use the **GTeForm** *homepage navigations* to *update and approve*, or **(3)** use the **IT GTeForm** *email links* to *update and approve*.
12.	This completes ***Approvals Tile***. **End of Procedure.**