



PeopleSoft_Financials_Upg rade_to_PUM51_Delta The Approvals Tile

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Training Guide
The Approvals Tile

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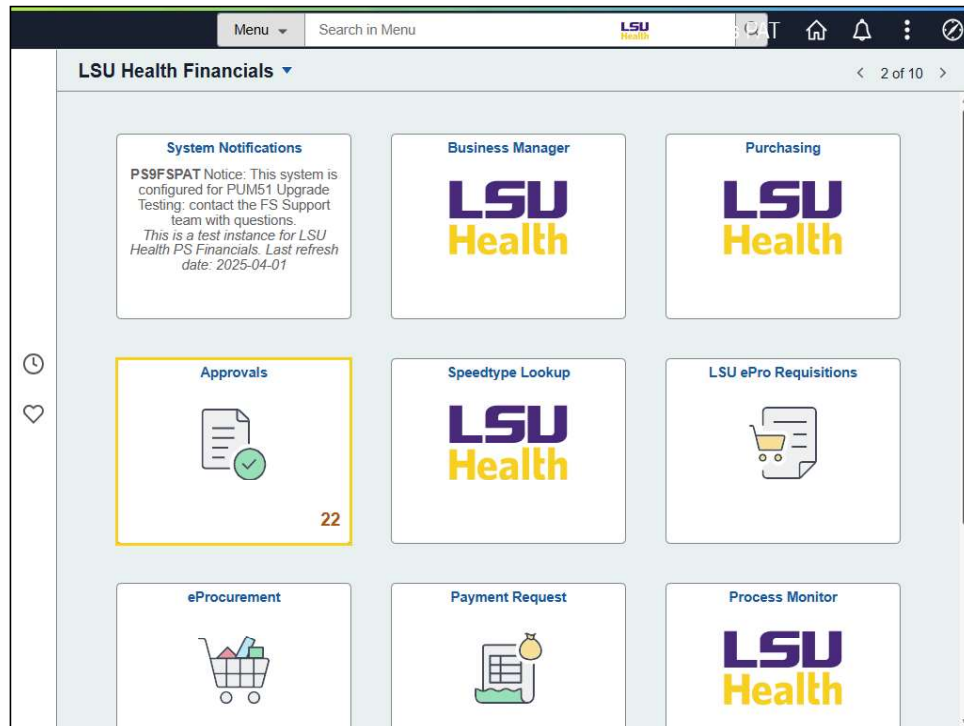
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PeopleSoft_Financials_Upgrade_to_PUM51_Delta

Approvals Tile

Procedure

In this topic you will learn how to use the [Approvals Tile](#).

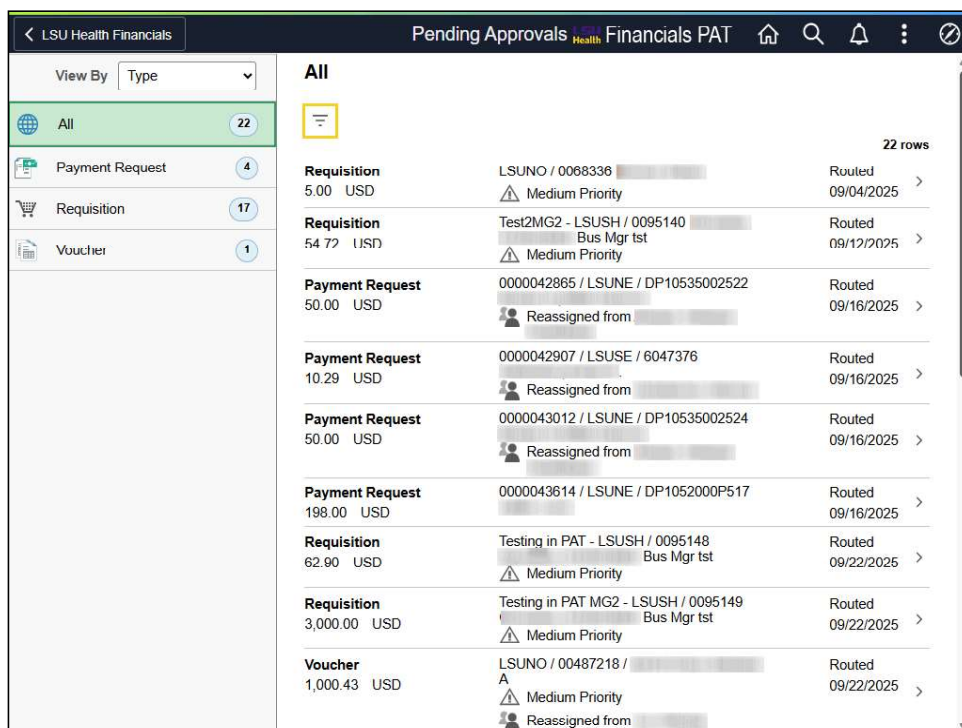


Step	Action
1.	Users with appropriate approval security will access the Approvals Tile from the LSU Health Financials homepage. Users will see any <i>requisitions, vouchers, payment requests, Journals (Shreveport), or GTeForms</i> pending their approval. Click the Approvals Tile button.
2.	The system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

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



LSU Health Financials	Pending Approvals	Financials PAT
View By Type	All	22
All	22	
Payment Request	4	
Requisition	17	
Voucher	1	
Requisition	5.00 USD	LSUNO / 0068336 Medium Priority Routed 09/04/2025
Requisition	54.72 USD	Test2MG2 - LSUSH / 0095140 Bus Mgr tst Medium Priority Routed 09/12/2025
Payment Request	50.00 USD	0000042865 / LSUNE / DP10535002522 Reassigned from Routed 09/16/2025
Payment Request	10.29 USD	0000042907 / LSUSE / 6047376 Reassigned from Routed 09/16/2025
Payment Request	50.00 USD	0000043012 / LSUNE / DP10535002524 Reassigned from Routed 09/16/2025
Payment Request	198.00 USD	0000043614 / LSUNE / DP1052000P517 Routed 09/16/2025
Requisition	62.90 USD	Testing in PAT - LSUSH / 0095148 Bus Mgr tst Medium Priority Routed 09/22/2025
Requisition	3,000.00 USD	Testing in PAT MG2 - LSUSH / 0095149 Bus Mgr tst Medium Priority Routed 09/22/2025
Voucher	1,000.43 USD	LSUNO / 00487218 / A Medium Priority Reassigned from Routed 09/22/2025

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. 

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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 <i>Voucher approval request</i> displays as <i>Doss, Barbara A</i> is the requester.
9.	The Approvals Tile displays GTeForms pending approval . This includes <i>Internal Transaction Forms, Clincard Requests, and AP Special Meals & Entertainment Requests</i> that have been submitted for approval.
10.	Due to the <i>GTeForm special design</i> for Internal Transactions , the Approvals Tile can <u>only</u> be used <u>after</u> the <i>debit chartstring</i> has been entered. The <i>GTeForm</i> will appear on the Approval Tile <u>even if</u> the <i>debit chartstring</i> has <u>not</u> been <u>entered</u> .
11.	Use <i>either</i> of these <i>three options</i> to approve <i>GTeForm Internal Transactions</i> : (1) use the IT GTeForm email link to update the <i>debit chartstring</i> , then use the Approvals Tile to approve, <u>or</u> (2) Use the GTeForm homepage navigations to update and approve, <u>or</u> (3) use the IT GTeForm email links to update and approve.
12.	This completes Approvals Tile . End of Procedure.