



PeopleSoft_Financials_Upg rade_to_PUM51_Delta The Approvals Tile

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Training Guide
The Approvals Tile

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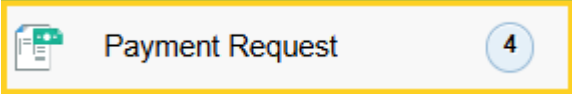
PeopleSoft_Financials_Upgrade_to_PUM51_Delta

Approvals Tile

Procedure

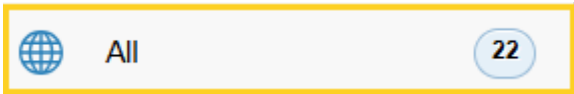
In this topic you will learn how to use the [Approvals Tile](#).

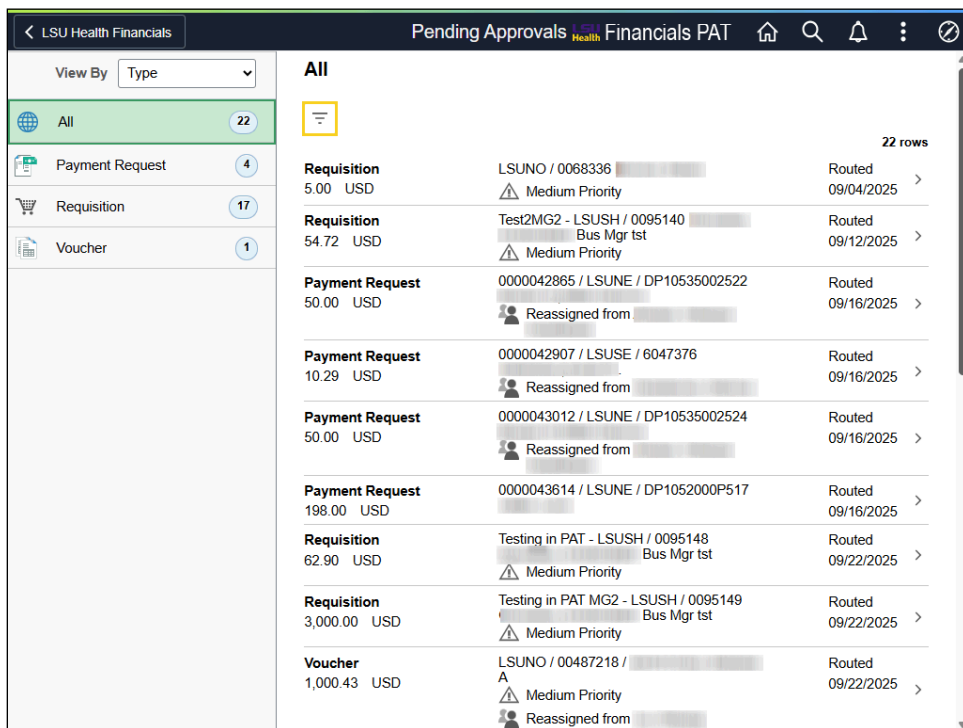


Step	Action
1.	Users with appropriate approval security will access the Approvals Tile from the LSU Health Financials homepage. Users will see any <i>requisitions, vouchers, payment requests, Journals (Shreveport), or GTeForms</i> pending their approval. Click the Approvals Tile button.
2.	The system <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. 



View By	Type	All	22
Payment Request	4		
Requisition	17		
Voucher	1		

Requisition	Amount	Currency	Status	Date
LSUNO / 0068336	5.00	USD	Routed	09/04/2025
Test2MG2 - LSUSH / 0095140	54.72	USD	Routed	09/12/2025
0000042865 / LSUNE / DP10535002522	50.00	USD	Routed	09/16/2025
0000042907 / LSUSE / 6047376	10.29	USD	Routed	09/16/2025
0000043012 / LSUNE / DP10535002524	50.00	USD	Routed	09/16/2025
0000043614 / LSUNE / DP1052000P517	198.00	USD	Routed	09/16/2025
Testing in PAT - LSUSH / 0095148	62.90	USD	Routed	09/22/2025
Testing in PAT MG2 - LSUSH / 0095149	3,000.00	USD	Routed	09/22/2025
LSUNO / 00487218 /	1,000.43	USD	Routed	09/22/2025

Step	Action
4.	Users may select the Filter option to <i>search for a specific approval option</i>. Click the Filter button. 
5.	Next to each Filter option is a drop-down arrow. Each option will <i>display its list of options</i> 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.