

Viewing prior purchase order approvals in PeopleSoft user guide

Overview

This guide provides steps to view prior approvals on a purchase order (PO) in Peoplesoft. Select the hyperlink for the most appropriate example option for your situation.

- [Example 1. How to check prior approvals on the PO.](#)
- [Example 2. How to review a PO pending approvals.](#)
- [Example 3. How to review a requisition attached to the PO to see if it has been approved by CP.](#)

Procedure

Example 1. How to check prior approvals on the PO.

- a. Log in to PeopleSoft.
- b. Select the **Add/Update PO** tile from My Homepage screen (Figure 1).



Figure 1. Add/Update PO Tile.

- c. The Purchase Order screen displays, defaulting to the Add a New Value tab (Figure 2).

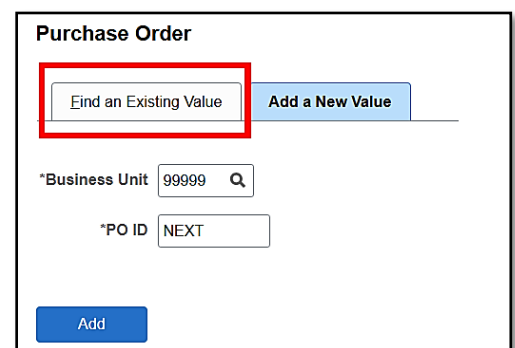
A screenshot of the "Purchase Order" screen. At the top, it says "Purchase Order". Below that are two tabs: "Find an Existing Value" (highlighted with a red box) and "Add a New Value". Below the tabs are two input fields: "*Business Unit" with the value "99999" and a search icon, and "*PO ID" with the value "NEXT". At the bottom left is a blue "Add" button.

Figure 2. Purchase Order Screen.

- d. Select **Find an Existing Value** tab (Figure 3).
 - (1) Enter the PO ID in the text field.
 - (2) Select **Enter** or **Search** to open the Maintain Purchase Order screen (Figure 3).

Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ **Search Criteria**

*Business Unit = 99999

PO ID begins with []

Purchase Order Date = []

PO Status = []

Short Supplier Name begins with []

Supplier ID begins with []

Supplier Name begins with []

Buyer begins with []

Buyer Name begins with []

PO Type = []

Purchase Order Reference begins with []

Hold From Further Processing ☐

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Figure 3. Find an Existing Value Tab.

- e. Select **View Approvals** at the bottom of the Maintain Purchase Order screen (Figure 4).

Maintain Purchase Order

Purchase Order

Business Unit 40500 PO ID 4056009045

Change Order 1

Copy From []

▼ **Header**

*PO Date 06/31/2024

*Supplier OMES-001

*Supplier ID 000000000

*Buyer TDEWEY01

PO Reference FY25 OMES ISD

Supplier Search

Supplier Details

Supplier Name OFFICE OF MANAGEMENT & ENTERPRISE SVCS

Buyer Tina Deasy

PO Status Pending

Budget Status Valid

Hold From Further Processing ☐

Do Not Status Valid

Backorder Status Not Backordered

Receipt Status Not Recd

Priority Medium

*Dispatch Method Print

Amount Summary

Merchandise	Freight/Tax/Misc.	Total Amount	Encumbrance Balance
103,061.25	0.00	103,061.25	Not Available

USD

Add Items From

Catalog Purchasing Kit

Item Search

Select Lines To Display

Search for Lines

Line [] To [] Retrieve

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		FY25 Master Service Agreement	1.0000	EA	80101507	100,000.0000	100,000.00	Pending
2		FY25 Kofax Imaging License	1.0000	EA	80101507	2,200.0000	2,200.00	Pending
3		SOW0002568 Network Cabling	1.0000	EA	80101507	1,761.25000	1,761.25	Pending

View Approvals

Close Short All Lines

*Go to [] More...

Save Return to Search Notify Refresh

Add Update/Display

Figure 4. Maintain Purchase Order Screen.

- f. Select **Yes** when prompted “Do you wish to save the current document?” (Figure 5).

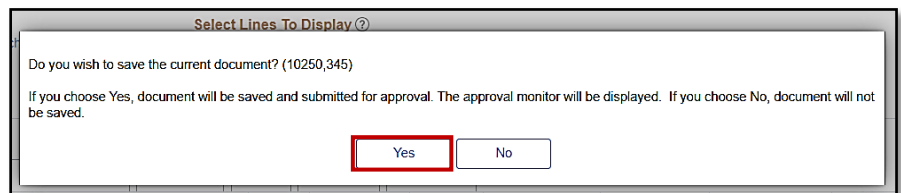


Figure 5. Prompt to Save.

- g. Select **Comment History** at the bottom of the View Approvals screen to expand the menu (Figure 6).
- i. Select the arrow next to Purchase Order if necessary to expand the screen to show the approval path.

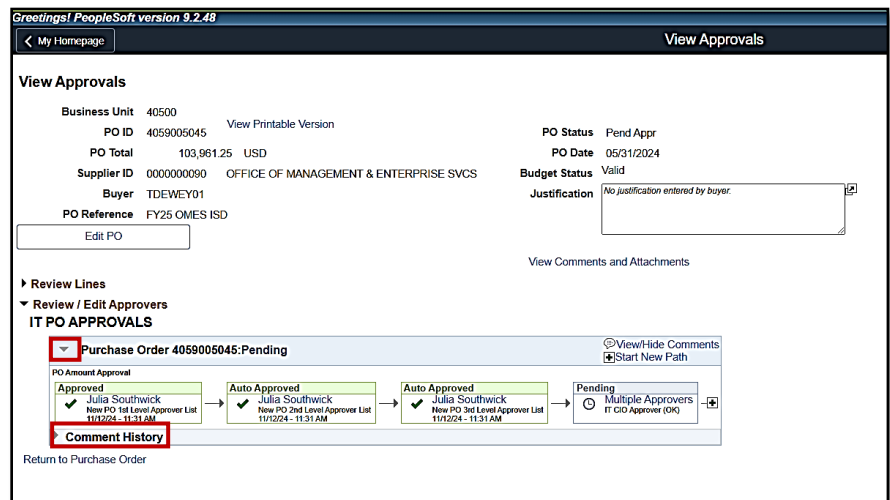


Figure 6. My Homepage Screen.

- (1) The **Comment History** dropdown displays any prior approval paths for review (Figure 7).
- i. Select the arrow under IT PO Approvals next to the purchase order, if necessary to expand the path.
- ii. Selecting the list item’s **View History** hyperlink will display the previous approval chain.
- iii. You may have to review several links to verify if there was a CP approver in any path.

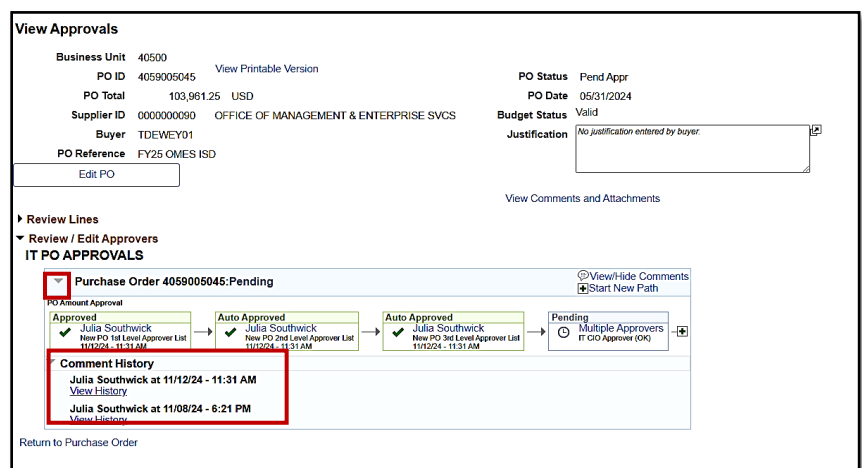


Figure 7. Comment History.

- (2) The Approval History screen displays showing previous approvals.
- Selecting the arrow next to Purchase Order expands the screen to show the approval path.
 - In this example, the fourth tile in the PO Amount Approval path, IT Buyer Approver shows a buyer from (090) has already reviewed this PO (Figure 8).
- Note, the title of buyer may vary (e.g., CP buyer, IT buyer, 7th level approver, etc.). If in doubt, contact your CP buyer or someone on the workflow team for assistance.
 - Note, the IT CIO approver is not the same as a CP Buyer approval.

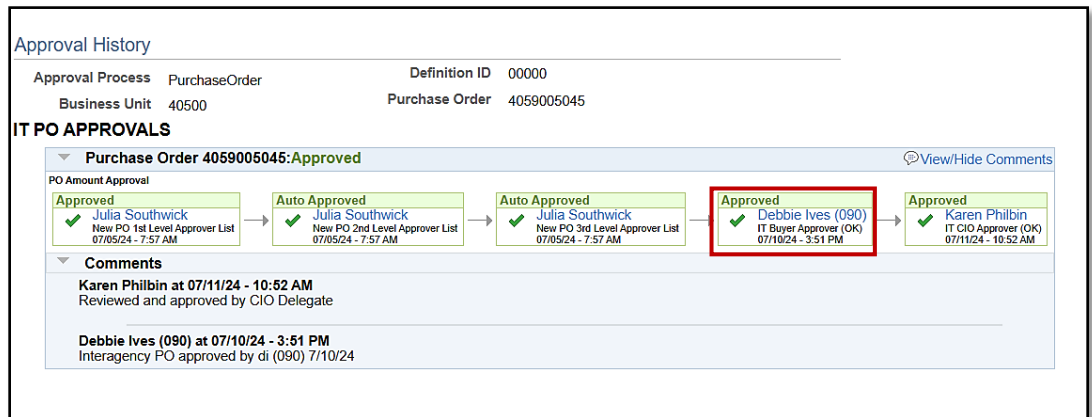


Figure 8. Previous History Display.

Example 2. How to review a PO pending approvals.

- Select the **Approvals** tile from the My Homepage screen (Figure 9).

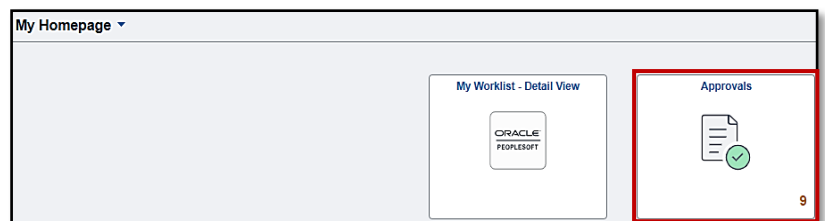


Figure 9. My Homepage Approvals Tile.

- Select the purchase order for review. In the example below, PO 5579001567 is selected (Figure 10).

View By	Type	All	Requisition	Purchase Order	Amount	Priority	Requester	Approvers	Status
			FY25/26 OCTAG Broadcasting Rec - 02500 / 0250003428 / Lyn Swihart		167,000.00 USD	High Priority			Routed 03/21/2025
			FY26 IT AUTHORITY ORDER - 52500 / 5250003707 / Lyn Swihart		500.00 USD	Medium Priority			Routed 03/21/2025
			FY25 Printers - 41500 / 4150004588 / Paula Hendricks		13,670.77 USD	Medium Priority			Routed 03/24/2025
			FY24 888K PB680 PM REPL 20161 - 34000 / 3400027563 / Lea Ann Reynolds		43,007.00 USD	Medium Priority			Routed 03/26/2025
			84500 / 6459004471 / Steven Coffman		358,490.28 USD	Medium Priority			Routed 03/26/2025
			Online Src From Req 5579000379 - 55700 / 5579001567 / Darlene Saltzman (090)		96,000.00 USD	Medium Priority			Routed 03/27/2025

Figure 10. Select Purchase Order.

- c. Select **Approval Chain** at the bottom of the screen (Figure 11).

Purchase Order

FINLEY & COOK PLLC
90,000.00 USD

Header is pending your approval

Summary

Supplier: FINLEY & COOK PLLC
PO Reference: Online Src From Req 5570000379
PO ID: 5579001567
PO Date: 06/21/24
Buyer: Darlene Saltzman (090)

PO Total: 90,000.00 USD
Status: Fund Appr
Business Unit: 55700
Routed Date: 06/21/24
Budget Status: Valid

Justification: FY25 Auditing Services and GASB 68 Audit, according to Title 74 FY25 Audit - \$52,500, FY24 GASB 68 - \$16,500 + escalation for FY25, and extra \$5,250 for election services and any ad hoc request due to legislative request

More Information

View Printable Version

Lines

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	SERVICE: Auditing services	90,000.00 USD	N	Y 73-715 - 74 O.S. § 85.7.A.6.a. OPPRS - Fund Managers, Investment Consultants & Actuaries OPPRS - Fund Managers, Investment Consultants & Actuaries	

Approver Comments

Approval Chain

Figure 11. Approval Chain.

- d. The Approval Chain screen displays (Figure 12).
- (1) Select **Comment History** at the bottom to display additional comments and any prior approval paths for review.
 - i. If necessary, select the drop-down arrow next to Purchase Order at the upper left side to expand the screen to show the approval path.

Approval Chain

AGENCY / CENTRAL PURCHASING

Purchase Order 5579001567 Pending

Start New Path

PO Amount Approval

Approved
Darcie Gordon
New PO 1st Level Approver List
03/27/25 9:30 AM

Approved
Darcie Gordon
New PO 2nd Level Approver List
03/27/25 9:30 AM

Approved
Darcie Gordon
New PO 3rd Level Approver List
03/27/25 9:30 AM

Pending
Multiple Approvers
New PO 7th Level Approver List

Comments

Darcie Gordon at 03/27/25 - 9:30 AM
Additional Funds added

Comment History

Figure 12. Comment History Expanded.

- (2) Selecting **View History** will bring up the previous approval chain (Figure 13).
- i. You may have to review several links to verify if there was a CP approver in any path.

Approval Chain

AGENCY / CENTRAL PURCHASING

Purchase Order 5579001567 Pending

Start New Path

PO Amount Approval

Approved
Darcie Gordon
New PO 1st Level Approver List
03/27/25 9:30 AM

Approved
Darcie Gordon
New PO 2nd Level Approver List
03/27/25 9:30 AM

Approved
Darcie Gordon
New PO 3rd Level Approver List
03/27/25 9:30 AM

Pending
Multiple Approvers
New PO 7th Level Approver List

Comments

Darcie Gordon at 03/27/25 - 9:30 AM
Additional Funds added

Comment History

Darcie Gordon at 03/27/25 - 9:28 AM
View History

Figure 13. View History.

- (3) The Approval history (Example, Figure 14) displays the previous approvals, and that a buyer from (090) has already reviewed this PO.
- If there is not a comment, selecting the arrow next to Purchase Order expands the screen to show the approval path.

reelings! PeopleSoft version 9.2.48

< Approval History View Approval History View

Approval History

Approval Process PurchaseOrder Definition ID 00000
Business Unit 55700 Purchase Order 5579001567

AGENCY / CENTRAL PURCHASING

▶ Purchase Order 5579001567

▼ Comments

Darlene Saltzman (090) at 06/24/24 - 2:35 PM
FY25 Auditing Services and GASB 68 Audit, according to Title 74 FY25 Audit - \$52,500, FY24 GASB 68 - \$16,500 + escalation for FY25, and extra \$5,250 for election services and any ad hoc request due to legislative request. Exempt.

Figure 14. Example of Previous Approval.

- In the Figure 15 example, the fourth tile in the PO Amount Approval path, the new PO 7th Level Buyer Approver, shows a buyer from (090) has already reviewed this PO.
- Note, the title of buyer may vary (e.g., CP buyer, IT buyer, 7th level approver, etc.). If in doubt, contact your CP buyer or someone on the workflow team for assistance.
- Note, the IT CIO approver is not the same as a CP Buyer approval

Approval History

Approval Process PurchaseOrder Definition ID 00000
Business Unit 55700 Purchase Order 5579001567

AGENCY / CENTRAL PURCHASING

▼ Purchase Order 5579001567: **Approved** View/Hide Comments

PO Amount Approval

Approved Darcie Gordon
New PO 1st Level Approver List
06/21/24 - 11:26 AM

→ Auto Approved Darcie Gordon
New PO 2nd Level Approver List
06/21/24 - 11:26 AM

→ Auto Approved Darcie Gordon
New PO 3rd Level Approver List
06/21/24 - 11:26 AM

→ Approved Darlene Saltzman (090)
New PO 7th Level Approver List
06/24/24 - 2:35 PM

▼ Comments

Darlene Saltzman (090) at 06/24/24 - 2:35 PM
FY25 Auditing Services and GASB 68 Audit, according to Title 74 FY25 Audit - \$52,500, FY24 GASB 68 - \$16,500 + escalation for FY25, and extra \$5,250 for election services and any ad hoc request due to legislative request. Exempt.

Figure 15. PO Amount Approval Path.

Example 3. How to review a requisition attached to the PO.

- a. Log in to PeopleSoft.
- b. Select the **Add/Update PO** tile from My Homepage screen (Figure 1).
- c. The Purchase Order screen displays, defaulting to the Add a New Value tab (Figure 2).
- d. Select **Find an Existing Value** tab (Figure 3).
 - (1) Enter the PO ID in the text field.
 - (2) Select **Enter** or **Search** to open the Maintain Purchase Order screen (Figure 4).
- e. While in the Maintain Purchase Order screen, select **Requisitions** (Figure 16).

The screenshot shows the 'Maintain Purchase Order' screen. The 'PO Reference' section on the left has a dropdown menu with 'Requisitions' selected and highlighted with a red box. Other sections include 'Header' with fields for PO Date, Supplier, and Buyer; 'Amount Summary' with a table of amounts; and 'Select Lines To Display' with search filters.

Line	Sched	Dist	Request BU	Req ID	Req Line	Req Sched	Req Distr	PO Qty	Amount	Req Amount	Req Qty	Final
1	1	1	55700	5570000379	1	1	1	1.0000	90,000.000	75,000.000	1.0000	

Figure 16. Requisitions.

- f. The PO Header Requisition Page displays showing any requisition(s) tied to this PO (Figure 17).
 - (3) Copy the requisition number to use in the next step.
 - (4) Return to the Peoplesoft homepage.

The screenshot shows the 'PO Header Requisition Page' with a table of requisition details. The table has columns for Line, Sched, Dist, Request BU, Req ID, Req Line, Req Sched, Req Distr, PO Qty, Amount, Req Amount, Req Qty, and Final. A 'Return' button is at the bottom left.

Line	Sched	Dist	Request BU	Req ID	Req Line	Req Sched	Req Distr	PO Qty	Amount	Req Amount	Req Qty	Final
1	1	1	55700	5570000379	1	1	1	1.0000	90,000.000	75,000.000	1.0000	

Figure 17. PO Header Requisition

- g. Select the **eProcurement** tile from the My Homepage screen on PeopleSoft (Figure 18).



Figure 18. eProcurement Tile.

- h. Select the **My Requisitions** tile (Figure 19).

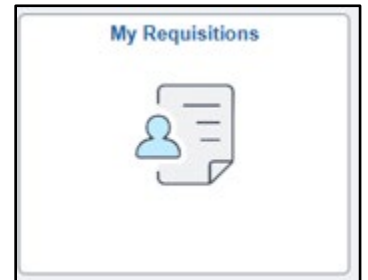


Figure 19. My Requisitions Tile.

- i. The eProcurement screen displays. The screen appearance will vary, depending on your settings (Figure 20 or Figure 21).

- (1) Select **Update Filters** (Figure 20).

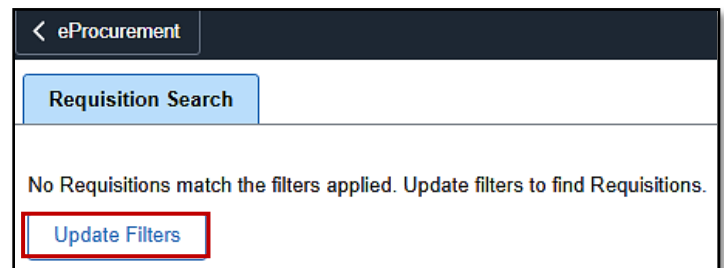


Figure 20. Update Filters.

- (2) Alternatively, select the button above the Action column, if this matches your settings (Figure 21).

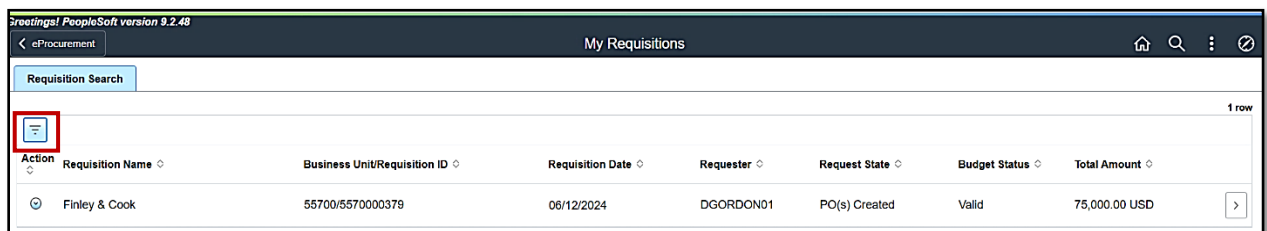


Figure 21. Alternative Screen.

- j. The Filters screen displays (Figure 22).
- (1) Enter the Business Unit in the text box.
 - (2) Enter the Requisition ID in the text box.
 - (3) Select **Enter** or **Done**.

Figure 22. Filters.

- k. The My Requisition screen displays.
- (1) Select the **arrow** under the Action column to provide available actions (Figure 23).

Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
Finley & Cook		55700/5570000379	06/12/2024	DGORDON01	PO(s) Created	Valid	75,000.00 USD

Figure 23. Requisition Search Screen.

- (2) Select **View Approval** from the Actions popup menu (Figure 24).

Business Unit/Requisition ID	Requisition Date	Requester	Request State
55700/5570000379	06/12/2024	DGORDON01	PO(s) Created

Figure 24. Actions Popup Menu.

- l. The Requisition screen displays.
- (1) Select the **Approval Chain** at the bottom of the screen (Figure 25).

Request for Finley & Cook
75,000.00 USD
Approved on 06/20/2024

Summary

Business Unit: 55700
Routed Date: June 12, 2024
Requester: Darcie Gordon

Requisition ID: 5570000379
Requisition Date: June 12, 2024
Entered by: Darcie Gordon
Budget Header Status: Valid

Approval Justification: FY25 Auditing Services and GASB 68 Audit, according to Title 74 FY25 Audit - \$52,500, FY24 GASB 68 - \$16,500 + escalation for FY25, and extra \$5,250 for election services and any ad hoc request due to legislative request.

More Information

View Printable Version

Lines

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	SERVICE: Auditing services	75,000.00 USD	N	73 - 715 - 74 O.S. § 85.7 A 6 a OPPRS - Fund Managers, Investment Consultants & Actuaries OPPRS - Fund Managers, Investment Consultants & Actuaries	

Approval Chain

Figure 25. Approval Chain.

- (2) Select the **arrow** under the Approve Requisitions box (Figure 26) to expand the approval path.

Approval Chain

Agency Approval Steps

- Finley & Cook Approved
- Comment History

Approve Requisitions

- Finley & Cook Approved
- Comments

Darlene Saltzman (090) at 06/20/24 - 7:07 PM
FY25 Auditing Services and GASB 68 Audit, according to Title 74 FY25 Audit - \$52,500, FY24 GASB 68 - \$16,500 + escalation for FY25, and extra \$5,250 for election services and any ad hoc request due to legislative request. Exempt.

Comment History

Figure 26. Approve Requisitions.

- (3) Select the **Comment History** arrow to review comments and see if a CP buyer has reviewed (Figure 27).

Approval Chain

Agency Approval Steps

- Finley & Cook Approved
- Comment History

Approve Requisitions

- Finley & Cook Approved
- Comments

Requires Central Purc Approval

- Approved
 - Darcie Gordon
Agency Buyer/CPO
06/13/24 11:22 AM
- Approved
 - Darlene Saltzman (090)
Buyer Assignment (OK)
06/20/24 7:07 PM

Comments

Darlene Saltzman (090) at 06/20/24 - 7:07 PM
FY25 Auditing Services and GASB 68 Audit, according to Title 74 FY25 Audit - \$52,500, FY24 GASB 68 - \$16,500 + escalation for FY25, and extra \$5,250 for election services and any ad hoc request due to legislative request. Exempt.

Comment History

Figure 27. Comment History.

- (4) Select the list item's View History hyperlink to display the previous approval chain.
 - i. You may have to review several links to verify if there was a CP approver in any path.
- (5) The Approval history screen displays showing previous approvals (Figure 28).
 - i. In the example, the second name in the PO Amount Approval path, Buyer Assignment (OK), shows a buyer from (090) has already reviewed this PO.
 - ii. Note, the title of buyer may vary (e.g., CP buyer, IT buyer, 7th level approver, etc.). If in doubt, contact your CP buyer or someone on the workflow team for assistance.
 - iii. Note, the IT CIO approver is not the same as a CP Buyer approval.

Approval Chain

Agency Approval Steps

- Finley & Cook Approved
- Comment History

Approve Requisitions

- Finley & Cook Approved
- Comments

Requires Central Purc Approval

- Approved
 - Darcie Gordon
Agency Buyer/CPO
06/13/24 11:22 AM
- Approved
 - Darlene Saltzman (090)
Buyer Assignment (OK)
06/20/24 7:07 PM

Comments

Darlene Saltzman (090) at 06/20/24 - 7:07 PM
FY25 Auditing Services and GASB 68 Audit, according to Title 74 FY25 Audit - \$52,500, FY24 GASB 68 - \$16,500 + escalation for FY25, and extra \$5,250 for election services and any ad hoc request due to legislative request. Exempt.

Comment History

Darcie Gordon at 06/13/24 - 10:32 AM
[View History](#)

Figure 28. Approval Chain.