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).
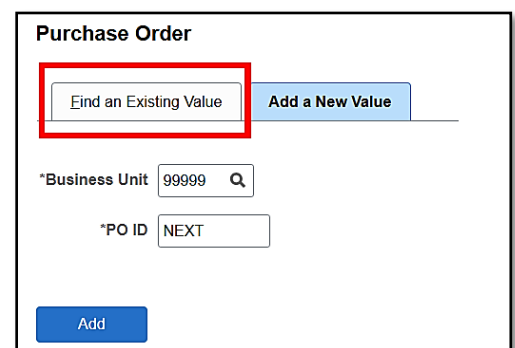

Figure 2. Purchase Order Screen.

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).

Figure 3. Find an Existing Value Tab.

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

Figure 4. Maintain Purchase Order Screen.

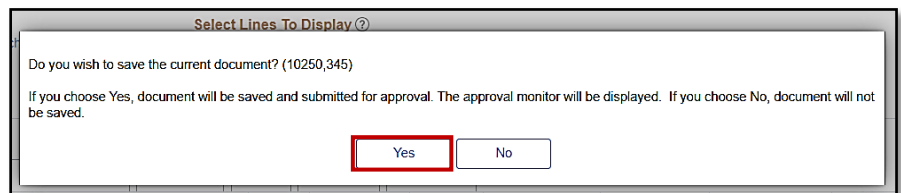f.   Select **Yes** when prompted "Do you wish to save the current document?" (Figure 5).

Figure 5. Prompt to Save.

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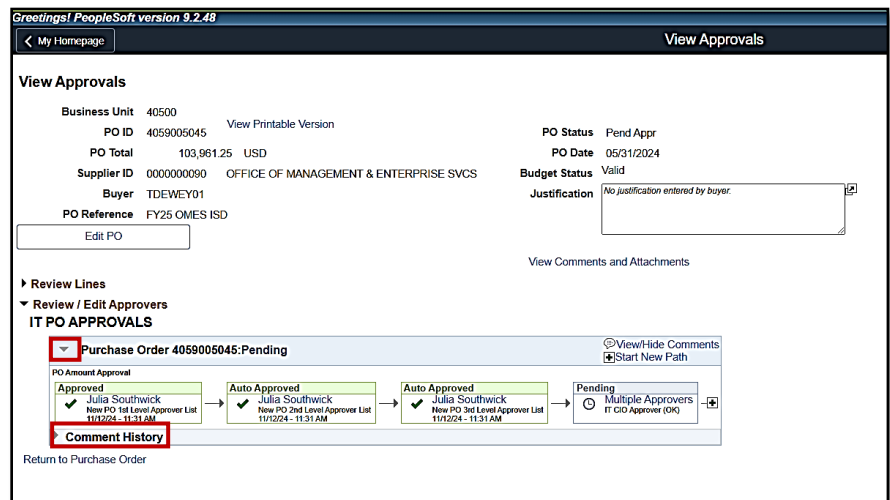   i.   Select the arrow next to Purchase Order if necessary to expand the screen to show the approval path.

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.
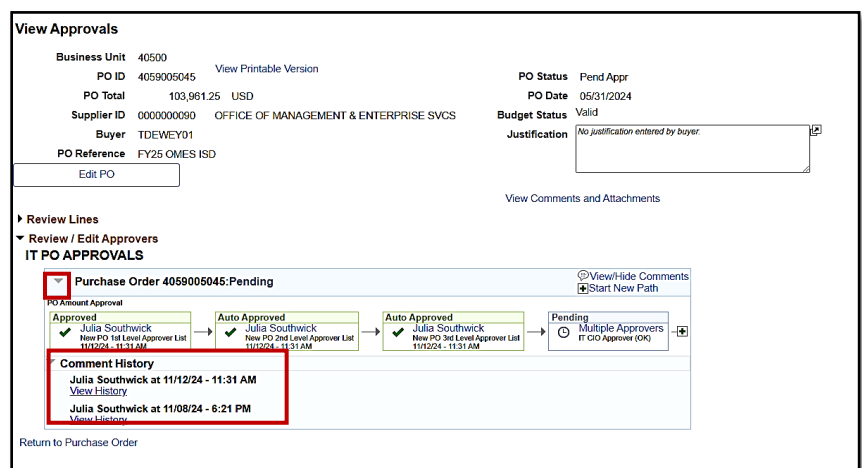   iii. You may have to review several links to verify if there was a CP approver in any path.

Figure 7. Comment History.

(2) The Approval History screen displays showing previous approvals.
  i. Selecting the arrow next to Purchase Order expands the screen to show the approval path.
  ii. 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.
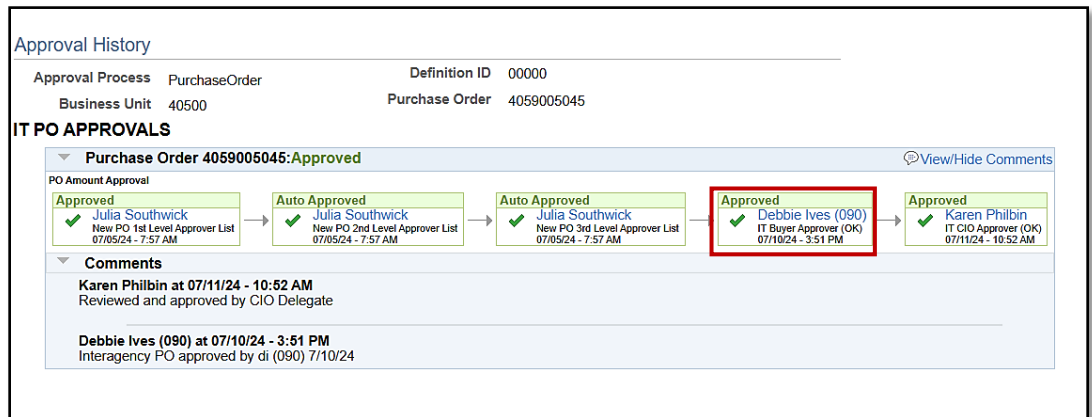

Figure 8. Previous History Display.

Example 2. How to review a PO pending approvals.
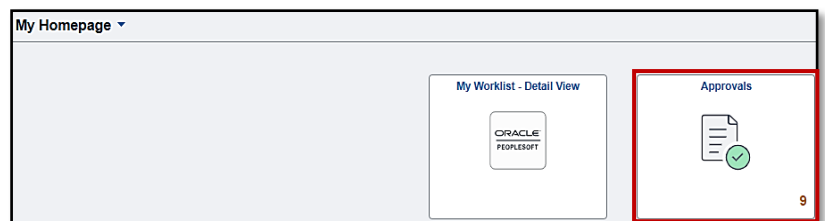 a. Select the **Approvals** tile from the My Homepage screen (Figure 9).

Figure 9. My Homepage Approvals Tile.

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

Figure 10. Select Purchase Order.

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

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.

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.

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.
   i. If there is not a comment, selecting the arrow next to Purchase Order expands the screen to show the approval path.

Figure 14. Example of Previous Approval.

   ii. 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.
   iii. 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.
   iv. Note, the IT CIO approver is not the same as a CP Buyer approval

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).

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.

Figure 17. PO Header Requisition

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

Figure 18. eProcurement Tile.
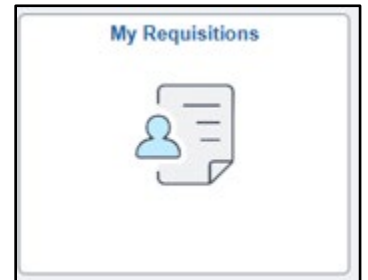
h. Select the **My Requisitions** tile (Figure 19).

Figure 19. My Requisitions Tile.

i. The eProcurement screen displays. The screen appearance will vary, depending on your settings (Figure 20 or Figure 21).
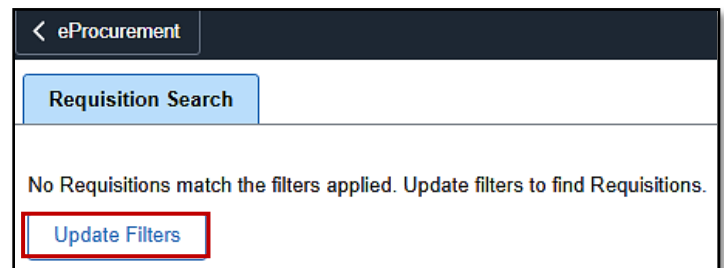
(1) Select **Update Filters** (Figure 20).

Figure 20. Update Filters.

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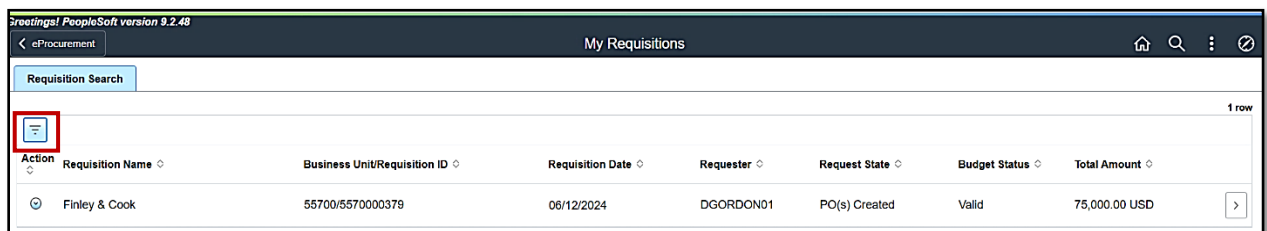

Figure 21. Alternative Screen.

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).

Figure 23. Requisition Search Screen.

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

Figure 24. Actions Popup Menu.

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

Figure 25. Approval Chain.

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

Figure 26. Approve Requisitions.

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

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.

Figure 28. Approval Chain.