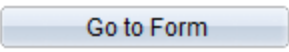
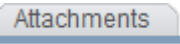
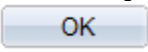
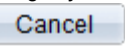


Business Process	Navigation
1. To Approve Forms	1. Main Menu > Finance Navigation > Worklist > Worklist

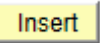
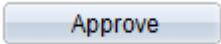
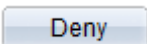
Use the following navigation to approve a form.

1. From the Menu, select **Finance Navigation > Worklist > Worklist**
2. Select a form to approve. This reference guide is applicable for any form, and is using the Deposit Report as an example.

The screenshot displays the 'Deposit Report' form within the 'Worklist' navigation pane. The form header includes 'Seq #: 69' and 'Subject: CE DEPOSIT'. A 'Go to Form' button is located below the subject. The 'Approval Action' section features a 'Comment' text area and 'Approve' and 'Deny' buttons. The 'Review/Edit Approvers' section shows the form status as 'Deposit Report: 69:Pending' with a 'Start New Path' button. Below this, a 'Pending' box lists 'Multiple Approvers' and 'Accounts Receivable Approver' with a plus sign button.

3. Press  to review the submitted form data.
4. After reviewing and making any corrections, as well as pressing  and downloading any files, press either  or  to return to the above page.
5. It is vital to download any attachments immediately because once the form is approved or denied, you will not be able to access the form again.
6. Enter any comments in the **Comment** section.
7. If you wish to add an ad hoc approver, press .

The dialog box is titled "Insert additional approver or reviewer" and has a subtitle "Choose an approver or reviewer to insert". It contains a "User ID:" text field with a magnifying glass icon to its right. Below this is the "Insert as:" section with two radio buttons: "Approver" (which is selected) and "Reviewer". At the bottom of the dialog are two buttons: "Insert" and "Cancel".

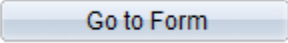
8. Select a **User ID** to add, and .
9. This may be repeated if multiple ad hoc **Approvers** are required.
10. Press either  or .

The form displays "Seq #: 69" and "Subject: CE DEPOSIT". Below the subject is a "Go to Form" button. The main section is titled "Review/Edit Approvers". It shows a summary for "Deposit Report: 69: Approved" with a "View/Hide Comments" link. Below this, a list of approvals is shown, with the first one being "Approved" by "Mary Engel" (Accounts Receivable Approver) on "06/25/13 - 5:05 PM". At the bottom of this section is a "Comments" link with a right-pointing triangle icon.

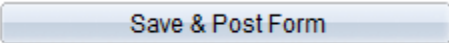
11. If you wish to view your comments, or the comments of other approvers in the workflow, press .

The screenshot shows a web interface for a 'Deposit Report' form. At the top, it displays 'Seq #: 69' and 'Subject: CE DEPOSIT'. Below this is a 'Go to Form' button. A section titled 'Review/Edit Approvers' contains a summary box for 'Deposit Report: 69:Approved' with a 'View/Hide Comments' link. The summary box shows a green checkmark and the name 'Mary Engel' as the 'Accounts Receivable Approver' with a timestamp of '06/25/13 - 5:05 PM'. Below the summary is a 'Comments' section showing a comment from 'Mary Engel at 06/25/13 - 5:05 PM' stating 'This looks great!'.

12. Comments will display.
13. If this form is for a Vendor or Customer, you will need to return to the form to post the data into the relevant tables in PeopleSoft. If not, you are finished with approving the form.

14. Press 

The screenshot shows a 'More Information' dialog box. It has a large empty text area for additional information. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Save & Post Form'.

15. On main page at the bottom, press 
16. You will receive a message stating that the form posting was successful.

Message

The form (SHARE/0000000986) has been successfully posted to the transactional tables thru CUSTOMER Component Interface. (18081,11419)

Link(s) to the transactional component(s) is(are) now available on the form.

OK

17. Press

OK

18. A new customer or vendor ID will appear as a clickable link.

More Information:

Related Documents

Personalize | Find | View All | First 1 of 1 Last

	Link to Related Component	Component Name	Submitted By	Submitted Date/Time
1	SHARE/0000000986	CUSTOMER_GENERAL	517756	06/25/13 5:23:46PM