

PeopleSoft

Manager Approvals (FIN)

Version 2.1 | Updated June 13, 2019

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For additional information about this publication please contact Peyri Herrera, Customer Resource Center Director.
Contact information: pherrera@sdcoe.net, (858) 569-5463.

Getting Started

Managers may be set up to approve various things in PeopleSoft Finance, like purchasing requisitions and budget transfers, for example. This means you are an “Approver.” There are two methods for approvals: (1) from an email link, and (2) from the PeopleSoft Finance Worklist. Directions for both of these methods are in this guide. Before you begin approving items, please log in to PeopleSoft Portal, reset your password, enter your security question in case you forget your password in the future, and verify that your email address is correct.

Log in to PeopleSoft Portal and reset your password.

1. Go to the **PeopleSoft Portal** at <https://peoplesoft.erp.sdcoe.net>. This is the site that you will want to bookmark. You can use Chrome, Firefox, Internet Explorer, Opera, and Safari.
2. Enter your **User ID** and **Default Password**. If you are a new user, you will be forced to change your auto-generated password the first time you log in.



USER ID:

- User ID = Your employee ID without hyphens.
- Example: 123456

AUTO-GENERATED PASSWORD:

- Password = The **First 4 of YOUR LAST NAME IN CAPS + Last 4 of SSN.**
- Example: Pat Smith = SMIT6789
- Example: Taylor Vo = VO6789
- Example: Sam O'Hara = O'HA6789
- Example: Shannon Van Woy = VANW6789 (ignores the space)

NOTE: If you have already used PeopleSoft Finance or HCM, continue to use your existing password.

3. Click **Sign In**. This will launch the PeopleSoft Portal. If you are using the default password, change your password on the next step.

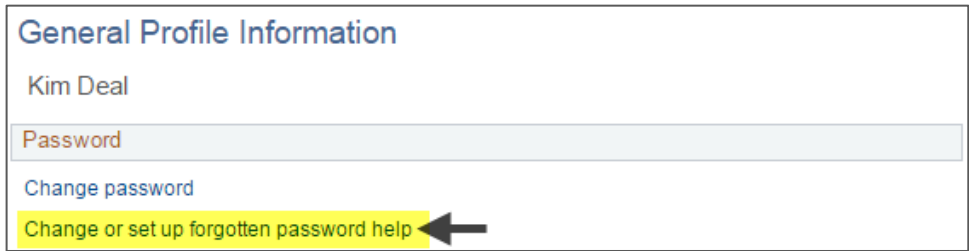
HOW TO GET HELP

If you cannot log in or are experiencing issues, please contact your district's PeopleSoft contact.

Provide your name, User ID, and a description of the problem. If necessary, the district PeopleSoft contact will work with the SDCOE Customer Resource Center (CRC) to resolve the issue.

Enter a security question and response.

4. Still logged in to PeopleSoft Portal, go to **Main Menu > My System Profile**.
5. **FIRST TIME USE:** If you are using the default password, click **Change password** and create a new PeopleSoft password. This is the one PeopleSoft password you will use to access PeopleSoft Portal and Employee Self-Service. You will need to change it ever 365 days.
6. Then click **Change or set up forgotten password help**.



General Profile Information

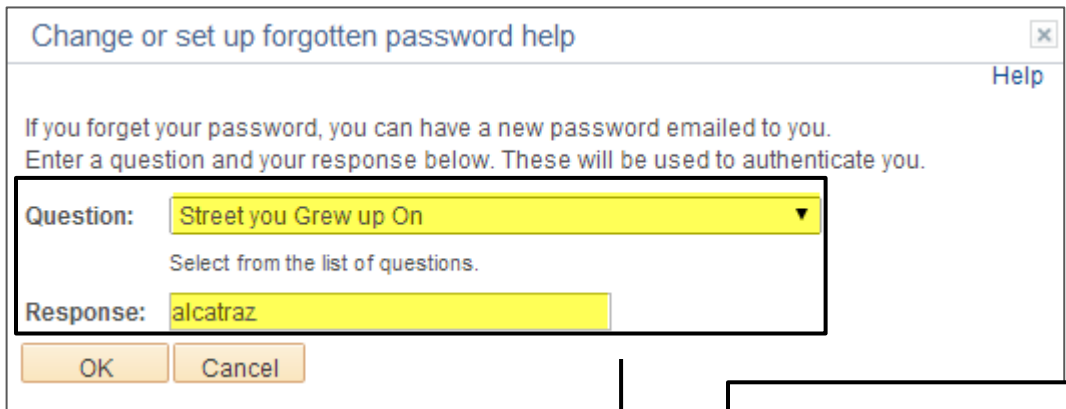
Kim Deal

Password

Change password

Change or set up forgotten password help

7. Select a security question, enter a response, then click **OK**. Your response is *not* case sensitive.



Change or set up forgotten password help

Help

If you forget your password, you can have a new password emailed to you.
Enter a question and your response below. These will be used to authenticate you.

Question: Street you Grew up On

Select from the list of questions.

Response: alcatraz

OK Cancel

SELECT A QUESTION:

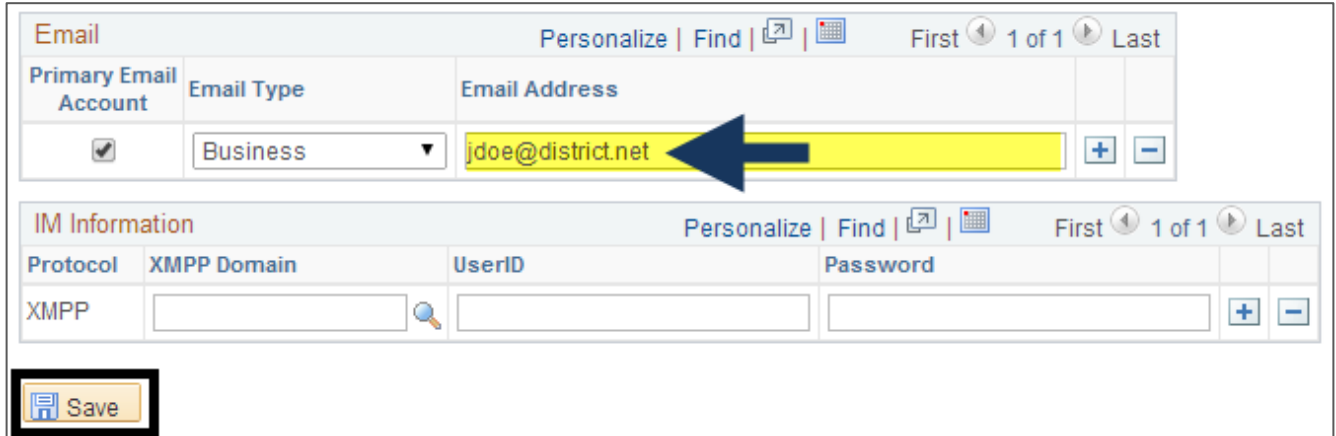
- What is the name of your childhood best friend?
- What is the name of your favorite actor?
- What is the name of your favorite childhood pet?
- What is your favorite food?
- What is your favorite hobby?
- What is your favorite vacation spot?
- What street did you grow up on?
- Who is your favorite cartoon character?
- Who is your favorite childhood hero?

TYPE A RESPONSE:

Enter a response you will remember later!
What you type is not case sensitive, so don't worry about upper/lowercase letters. (Your PeopleSoft password, however, is case sensitive).

Confirm that your email address is accurate.

- Back on the **My System Profile** page, confirm that your email address in PeopleSoft is accurate. If it is incorrect, edit it. This will be the address that a temporary password is sent to in the case that you forget your password and click “Forgot My Password” from the signin page.

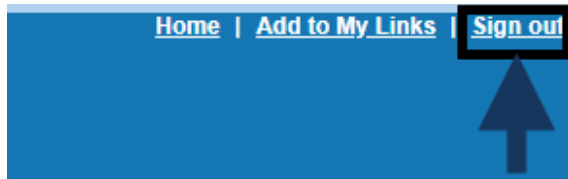


Email				Personalize	Find	First	1 of 1	Last
Primary Email Account	Email Type	Email Address						
<input checked="" type="checkbox"/>	Business	jdoe@district.net						

IM Information				Personalize	Find	First	1 of 1	Last
Protocol	XMPP Domain	UserID	Password					
XMPP								

Save

- Click **Save** (bottom of screen).
- You are done with the setup. Click **Sign Out** to end this session.



In the future if you forget your password, simply click **Forgot My Password on the Portal or ESS login page.** You will be prompted to enter your ID and answer to the security question. Then a new temporary password will be emailed to you using the email address on file in PeopleSoft.

Method 1: Approve from the Email Link

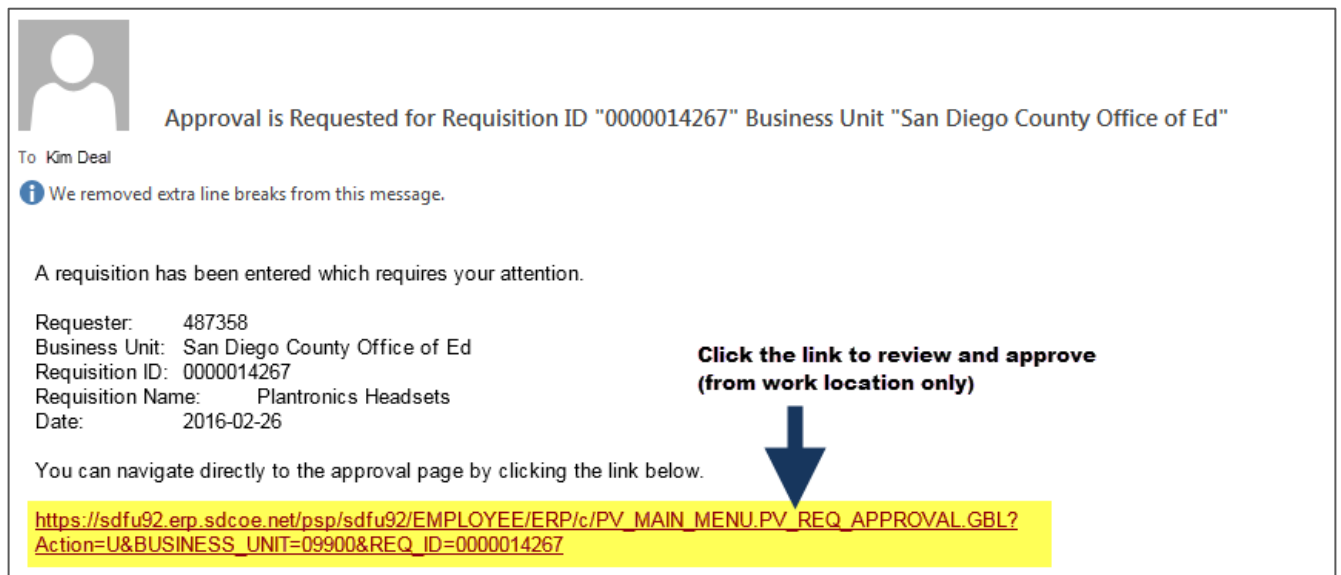
If you need to approve a requisition, budget transfer, or other PeopleSoft item, you will receive an email message. Your email address needs to be set up correctly in PeopleSoft in order for this to work (see FAQ #6 on p.12).

There is an alternate method for approving by using a worklist in PeopleSoft Finance – see p.7. for directions.

You must be at work to use PeopleSoft.

Directions for Approvers:

1. When you receive an “approval email”, click the link.



Approval is Requested for Requisition ID "0000014267" Business Unit "San Diego County Office of Ed"

To: Kim Deal

i We removed extra line breaks from this message.

A requisition has been entered which requires your attention.

Requester: 487358
Business Unit: San Diego County Office of Ed
Requisition ID: 0000014267
Requisition Name: Plantronics Headsets
Date: 2016-02-26

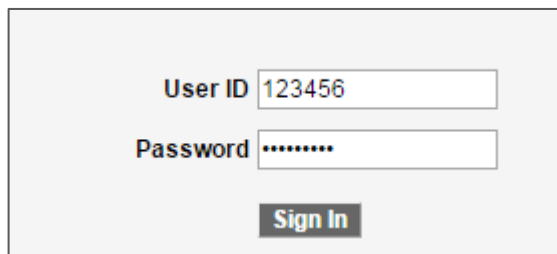
**Click the link to review and approve
(from work location only)**

You can navigate directly to the approval page by clicking the link below.

https://sdfu92.erp.sdcoe.net/psp/sdfu92/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=09900&REQ_ID=0000014267

NOTE: The URL in this example is a sample only. Remember, since PeopleSoft is only available at work, the link will not go to PeopleSoft if you click it from a non-work environment.

2. You will be taken to the PeopleSoft Finance page. Log in with your ID and password.



User ID

Password

Sign In

- **User ID:** Your 6-digit employee ID, no hyphen
 - **Password:** Use the password that you created on your first login (see *Getting Started* on p.1)
3. Upon logging in, you will be taken directly to the item in the email message that needs to be approved.

4. Review the item to approve.

In this example, **Frank Black** entered **Requisition #14267** for 2 headsets (**total \$435.24**). The budget status is **Valid**.



The screenshot shows the Oracle Requisition Approval interface. Key elements include:

- Business Unit:** 09900
- Requisition ID:** 0000014267
- Requisition Name:** Plantronics Headsets
- Requester:** Frank Black
- Entered on:** 02/26/2016
- Status:** Pending
- Priority:** Medium
- Budget Status:** Valid
- Total Amount:** 435.24 USD

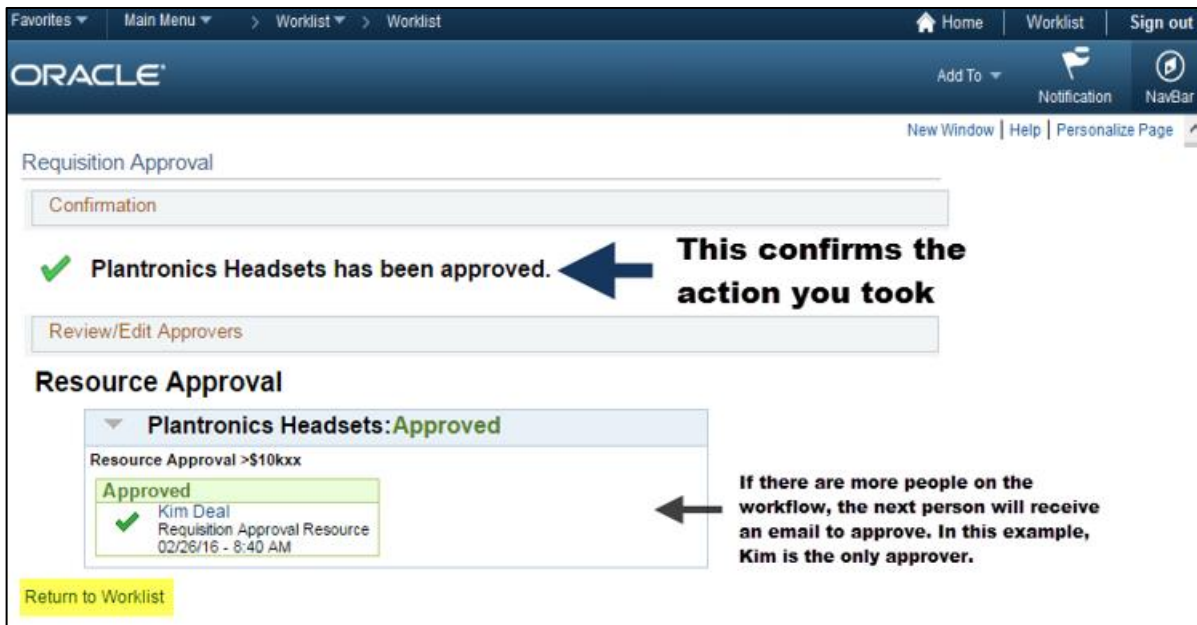
Annotations:

- Review the information to approve. In this example, this is a requisition for 2 headsets (\$435.24).** (Points to the requisition details)
- Click to view a printable version.** (Points to the 'View printable version' link)
- Some approval screens let you view line details including ChartString/budget information. If there are multiple lines, click the Select All checkbox, then click View Line Details.** (Points to the 'View Line Details' button)
- This area shows the approval path (workflow). If desired, click the green plus sign to the right of your name if you want to add another "ad hoc" approver to the workflow for this specific item.** (Points to the approval path area)
- As the approver you can enter comments here. Comments are required if you deny or hold.** (Points to the 'Enter Approver Comments' field)
- Approve, deny, or hold.** (Points to the 'Approve', 'Deny', and 'Hold' buttons)

Line	Item Description	Supplier Name	Quantity	UOM	Price	USD	Requester's Comments
1	CS540/HL10 CS540 WHL10 LIFT...	MORE DIREC-001	2.0000	EA	217.62000	USD	

5. Click **Approve, Deny, or Hold**. If you click Deny or Hold, comments are required so the employee knows why this will not be approved. If appropriate, include details of what the employee can change to get it approved.

6. You will see a message indicating that the item was approved, denied, or held.
Example: Plantronics Headsets has been approved.



The screenshot shows the Oracle Requisition Approval interface. At the top, there is a navigation bar with 'Home', 'Worklist', and 'Sign out' options. Below the navigation bar, the page title is 'Requisition Approval'. A confirmation message is displayed: 'Confirmation' followed by a green checkmark and the text 'Plantronics Headsets has been approved.' An arrow points from this message to the text 'This confirms the action you took'. Below the confirmation message is a 'Review/Edit Approvers' button. Underneath, the 'Resource Approval' section shows a card for 'Plantronics Headsets: Approved'. The card details include 'Resource Approval >\$10kxx', 'Approved' with a green checkmark, and the approver's name 'Kim Deal' along with the date and time '02/26/16 - 8:40 AM'. An arrow points from this card to the text 'If there are more people on the workflow, the next person will receive an email to approve. In this example, Kim is the only approver.' At the bottom left, there is a yellow 'Return to Worklist' button.

7. At this point you can:
- Click **Sign Out** (top-right) if you are done.
 - Click **Worklist** or **Return to Worklist** if you would like to see if you have other items to approve.

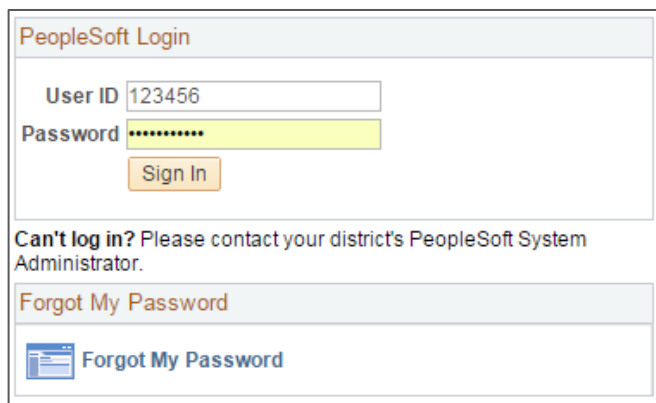
Method 2: Approve from the Finance Worklist

Use the Finance Worklist to see if you have any pending items that need to be approved. Some people prefer to work from their email messages; others prefer to use the worklist; some use a combination of both methods.

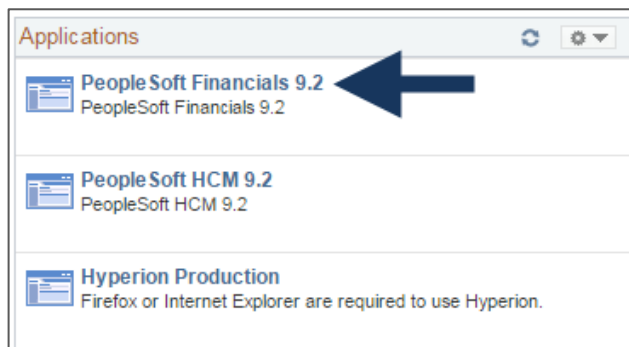
Remember, you must be at work in order to use PeopleSoft.

Directions for Approvers:

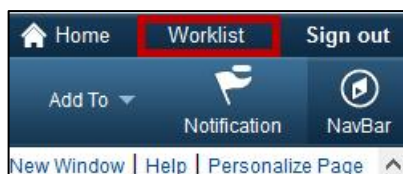
1. Go to the **PeopleSoft Portal** at <https://peoplesoft.erp.sdcoe.net>.
2. Enter your **User ID** and **Password**, then click **Sign In**. This will open the PeopleSoft Portal.



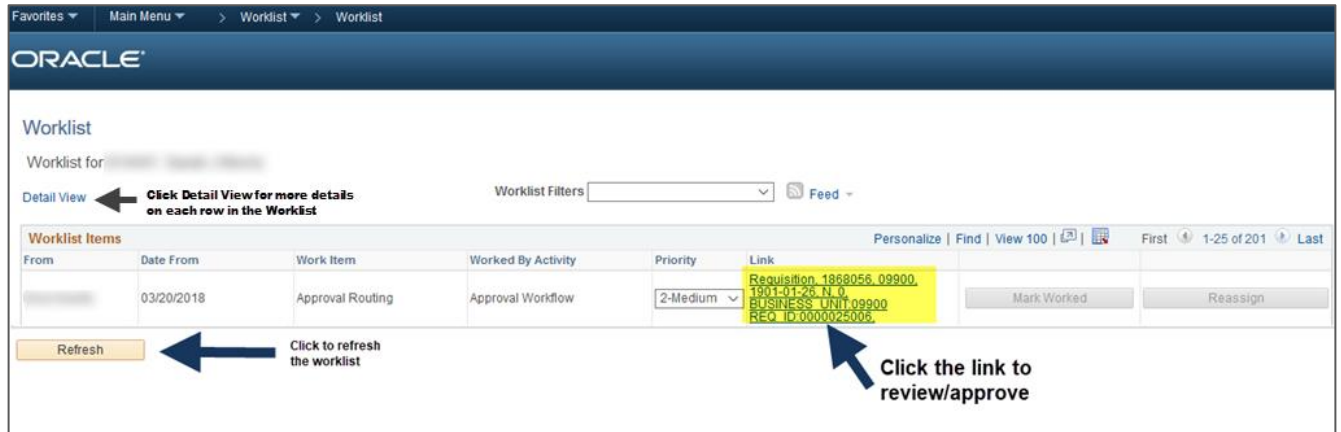
- **User ID:** Your 6-digit employee ID, no hyphen
 - **Password:** Use the password that you created on your first login (see *Getting Started* on p.1)
3. In the Portal, click the **PeopleSoft Financials 9.2** link. This will open the PeopleSoft Finance application in a new tab/window.



4. Click **Worklist**. This will show you any pending items that you need to approve.



- If there is an item to review/approve, click the link.



Worklist

Worklist for [redacted]

Detail View ← Click Detail View for more details on each row in the Worklist

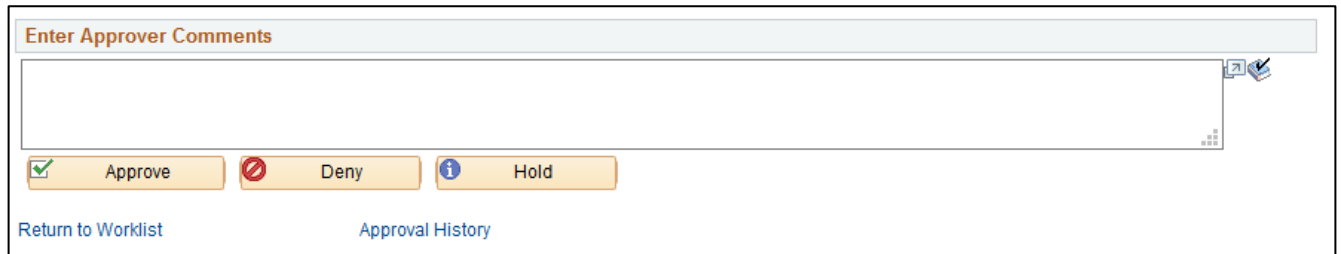
Worklist Filters [dropdown] Feed -

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
[redacted]	03/20/2018	Approval Routing	Approval Workflow	2-Medium	Requisition: 1869056_09900 1901-01-26_N.O. BUSINESS_UNIT:09900 REQ_ID:00000025005		

Refresh ← Click to refresh the worklist

Click the link to review/approve

- Review the item to approve. See p.5 for an example of a requisition that needs approval.
- Click **Approve**, **Deny**, or **Hold**. If you click Deny or Hold, comments are required so the employee knows why this will not be approved. If appropriate, include details of what the employee can change to get it approved. You will see a message indicating that the item was approved, denied, or held.



Enter Approver Comments

[Text Area]

Approve Deny Hold

Return to Worklist Approval History

- At this point you can:
 - Click **Sign Out** (top-right) if you are done.
 - Click **Worklist** or **Return to Worklist** if you would like to see if you have other items to approve.

Confirm Your User Email Address for Routing

From the My Profile page, you can confirm your user email address is accurate for routing. Here you can also change your password and/or enter a security question, if necessary.

Directions to Confirm Your User Email Address:

1. Log into **PeopleSoft ESS** (<https://ess.erp.sdcoe.net>) or **Portal** (<https://peoplesoft.erp.sdcoe.net>).
2. From ESS, click the **My Profile** link displayed on the screen. From Portal, navigate to **Main Menu > My System Profile**.
3. Scroll to the **Email** section. Confirm your email address is correct for routings. This email address also is tied to the “Forgot My Password” functionality.

Email			Personalize	Find	Print	First	1 of 1	Last
Primary Email Account	Email Type	Email Address						
<input checked="" type="checkbox"/>	Business	user@district.net						

4. If you made any changes, click **Save** (orange button).

Directions to Change Your Password or Enter Security Question:

1. On the My Profile page, go to the **Password** section.

General Profile Information

My Profile

Password

[Change password](#)

[Change or set up forgotten password help](#)

2. Click the **Change password** link to update your current password.
3. Click **Change or set up forgotten password help** to enter a security question and answer. This is tied to the “Forgot My Password” functionality.

PeopleSoft “Out of Office” (Alternate User for Approvals)

Are you a Manager or Approver who is going on vacation? In PeopleSoft, an alternate user can be granted access to handle approvals for a range of dates, similar to an out of office setting. This is set up in PeopleSoft ESS or Portal. Once you assign an alternate user for a date range, he or she will be able to approve *all of the transaction types* that you have access to. You cannot pick and choose which transactions the alternate user sees.

Directions:

4. Log into **PeopleSoft ESS** (<https://ess.erp.sdcoe.net>) or **Portal** (<https://peoplesoft.erp.sdcoe.net>).
5. From ESS, click the **My Profile** link displayed on the screen. From Portal, navigate to **Main Menu > My System Profile**.
6. Scroll to the **Alternate User** section. Enter 3 fields. Select an alternate user for approvals for a specified date range. If you don't know the ID of the employee, click the magnifying glass and search by “Description.”
7. Click **Save** (orange button).

General Profile Information

Password

[Change password](#)

[Change or set up forgotten password help](#)

Personalizations

My preferred language for PIA web pages is: English

My preferred language for reports and email is:

Currency Code:

Default Mobile Page:

MANAGERS:

For PeopleSoft out of office for your routings, enter these 3 fields and click Save (orange button).

Alternate User DO THIS FROM ESS OR PORTAL

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID: **ENTER THE ALTERNATE APPROVER**

From Date: (example: 12/31/2000)

To Date: (example: 12/31/2000)

THIS IMPACTS ALL ROUTINGS (FIN & HCM)

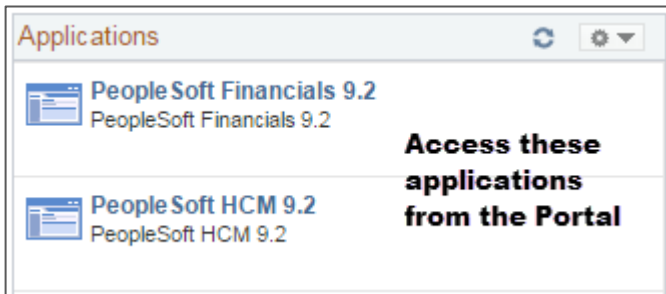
For additional details about Alternate User, please see

<http://crc.sdcoe.net/announcements/peoplesoftnews/alternateuserthepeoplesoftoutofofficesettingforapprovals>.

FAQs

1. What is Portal? What are Finance and HCM?

PeopleSoft Portal is at <https://peoplesoft.erp.sdcoe.net>. Once you log into Portal, you can access Finance and HCM (Human Capital Management), two PeopleSoft applications.



For more information, please refer to the *Introduction to PeopleSoft Guide* at <http://crc.sdcoe.net/resources/peoplesoft/guides>.

2. I don't know my PeopleSoft User ID.

Your user ID is your employee ID with no hyphen. You can find this on your paycheck stub.

3. I forgot/don't know my PeopleSoft password. Who can reset it?

If you have not set up your "Forgot My Password" security question, contact your district or charter school's designated staff member and ask them to reset your password.

4. I entered a security question and response. How do I reset my forgotten password?

If you entered a security question and response in PeopleSoft and your email address is valid (p.1) and you forget your password, simply click **Forgot My Password** on the Portal login page. You will be prompted to enter your ID and answer to the security question. Then a new temporary password will be emailed to you using the email address on file in PeopleSoft.



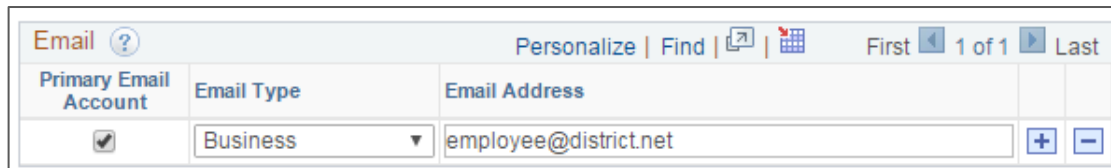
5. How do I change my password?

If you need to change your password, go to ESS My Profile or Portal My System Profile. Always change your password from the ESS or Portal so they propagate and update all PeopleSoft applications (except Hyperion, which has its own separate password).

6. One of my direct reports said that he/she submitted a requisition for approval however I did not receive an email message. Why not?

Things to check:

- **Is the item on your worklist?** If so, this confirms that the employee submitted the item for approval and that it was indeed routed to you. If not, perhaps the employee did not submit the item, or maybe the workflow is not set up correctly. If you suspect that workflow is not set up correctly, contact your district's PeopleSoft Finance Contact.
- **Did it go to junk mail?** Look in your spam or junk mail folder and confirm that the email did not end up there.
- **Is your email address in PeopleSoft correct?** Log into Portal and go to **Main Menu > My System Profile** and check that your email address is correct.



Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	employee@district.net

7. I'm going to go on vacation. Can I route my approvals to someone else while I am out of the office?

Yes. Use the Alternate User function described on p.10. Note that you must set this up in ESS or Portal.

8. I am on vacation and there are items in my worklist that need to be approved but I can't access them. Who can approve for me?

At this time, contact your district or charter school's PeopleSoft Finance Contact(s) and let him/her know. That person will need to contact the SDCOE Customer Resource Center so the worklist items can be re-routed to another employee.

In the future, consider entering an **Alternate User** for approvals while you are out of the office. See p.10.

**9. I'd like to have more information about what to look at when I do approvals.
Where can I get more information about approvals?**

Go to the SDCOE Customer Resource Center Guides & Job Aids page at <http://crc.sdcoe.net/resources/peoplesoft/guides>. These guides have information about approvals:

Folder	Guide	Section Reference
Budget Monitoring - KK2 Manage & Approve Budgets	KK2 Manage and Approve Budgets Guide	Approving Budget Journals
General Ledger - GL1 General Ledger	GL1 General Ledger Guide	Stage 4: Approving Journal Entries
Purchasing - PO1 Requisitions	PO1 Requisitions Guide	Part III: Approving Requisitions (For Managers)
Purchasing - PO2 Purchase Orders	PO2 Purchase Orders Guide	Part III: Approve Purchase Orders