



Your Worklist and the Approval Tile

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**Training Guide
and the Approval Tile**

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Open Your Worklist

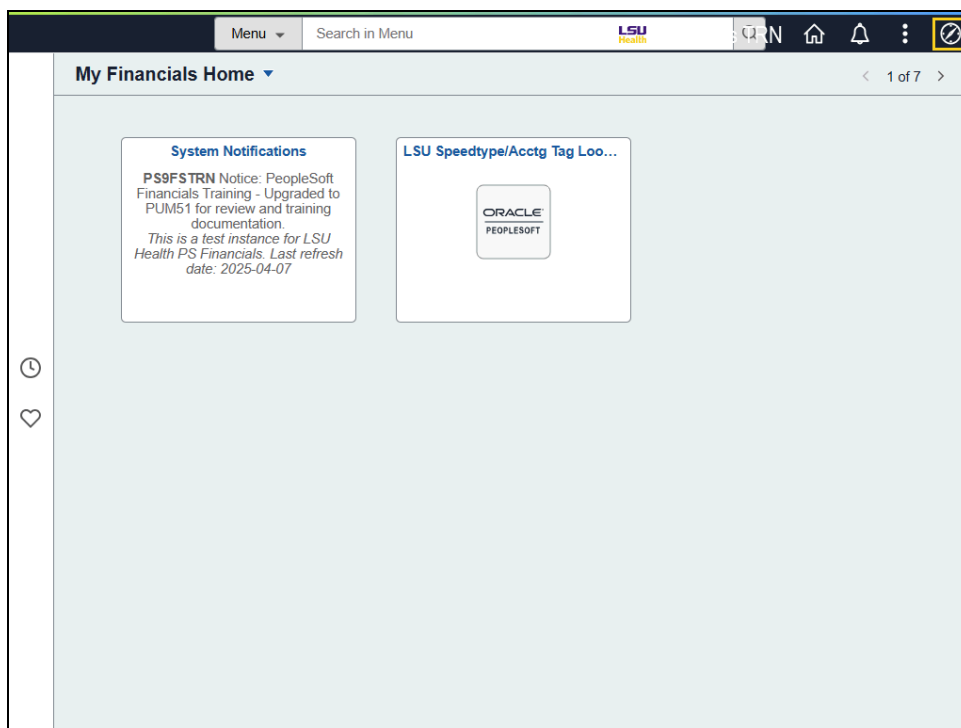
Procedure

In this topic you will learn how to [Open Your Worklist](#).

Step	Action
1.	Users have multiple ways to approve documents in PeopleSoft. One of the most used methods for approving is to use the email notification URL link that takes you directly to the login screen and then the approval page. The Approvals Tile may be added to My Financials Home. Using the tile, you will be able to see all approval requests pending your action. <i>NOTE: Workflow items, such as approvals, will not be viewable using the Bell icon or Notifications panel. Other types of notifications, such as Process Scheduler notifications, will be viewable using the Bell icon and Notifications panel.</i> The longest used method to oversee all documents requiring your attention is the "Worklist." The Worklist will include only those transactions to which you are assigned, both as a primary and as a secondary (back-up) approver. Types of documents to be approved are GTeForms, Journals, Delegations, Requisitions, Payment Requests and Vouchers. Documents from multiple Departments (Cost Centers) may appear on the Worklist if the user's security access is set to approve documents for more than one department.
2.	Requisition Approvers Only <i>NOTE for LSUNO: If an approver at the campus level can enter a requisition, his/her requisition will not appear on the Worklist. Unchecking the Hold from Further Processing option and saving the requisition will change the status of the requisition to Approved.</i> <i>NOTE to LSUSH: If an approver at the campus level also can enter a requisition, his/her requisition will not appear on the Worklist. Users are not allowed to approve their own entries, and the requisition would appear on another user's worklist who has approval authority for that department.</i> <i>NOTE to LAKMC: If an approver at LAKMC can enter a requisition, his/her requisition will not appear in the Worklist. Unchecking the Hold from Further Processing option and saving the requisition will move the requisition to Purchasing's Worklist.</i>

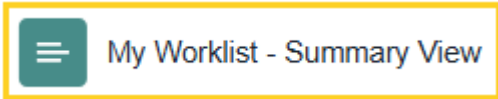
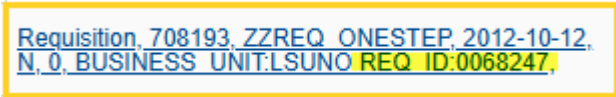
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Step	Action
3.	Accessing Worklist using Mobile Device <i>NOTE: Users must be connected to LSUHSC network access by either being on-campus, through VPN, or signed in the LSUHSC Remote Access Portal for their worklists to be displayed on their mobile phone.</i>
4.	There are <i>three (3) methods</i> for accessing the Worklist , each will be reviewed in this document.

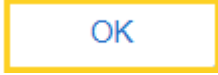


Step	Action
5.	The first method is to navigate to the Worklist using the NavBar menu. Click the NavBar button. 
6.	Click the Menu button.
7.	Click the Worklist menu. 

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Step	Action
8.	Click the My Worklist - Detail View list item. 
9.	The complete Details View list of documents awaiting approval display. The date and time the item was created, and the Business Process Name appear in the Details View . Click the NavBar button. 
10.	Click the My Worklist - Summary View list item. 
11.	In the Summary View , the date appears but the time does <u>not</u> . Nor is the Business Process Name displayed.
12.	Worklist items display in ascending order by date. Users can click on any column header to sort/resort the displayed data. Click the Date From column header. 
13.	Worklist items now display in descending order. The user may select the Date From column header again to return to the original view.
14.	Documents do not have to be approved in any order. Users may click the Priority drop-down arrow next to each document link to make a notation of the user's priority order. This does <u>not</u> , however, reorder the links.
15.	Click on the Link contained within the Worklist to process document approval. In this example, a requisition document is selected. Click the REQ ID: 0068247 link. 
16.	The document awaiting approval displays. Click the Home button. 

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Step	Action
17.	A second method to <i>access</i> the <i>Worklist</i> is to use the Recently Visited menu option from the NavBar. Click the NavBar button. 
18.	Click the Recently Visited menu. 
19.	A listing of the most recently visited pages by the user displays in the menu. Click the My Worklist - Summary View button. 
20.	The Worklist displays. While on the Worklist, the user may choose to add the Worklist to Favorites. Choose the Actions (3 stacked dots) menu option. Click the Actions menu. 
21.	Click the Add to Favorites link. 
22.	Click the Chrome Legacy Window object. 
23.	A confirmation message displays. Click the OK button. 
24.	Click the Home button. 
25.	From the Home page, access the Favorites from either the Heart icon on the left side of the page or from NavBar Favorites.

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Step	Action
26.	If desired, the user may add the Worklist to My Financials Home by <i>Personalizing the Homepage</i> . <i>See documentation on the “Personalize using Tiles, Favorites or Pages” for instructions.</i>
27.	This completes <i>Open Your Worklist</i> . End of Procedure.

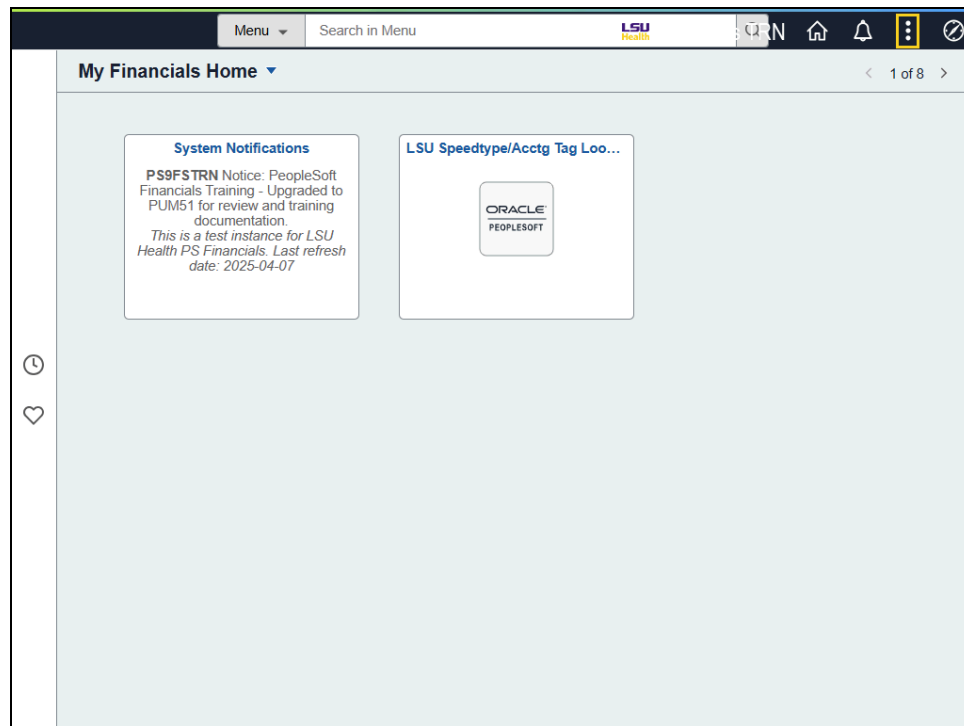
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The Approval Tile

Procedure

In this topic you will learn how to use **The Approving Tile**.

Step	Action
1.	The Approvals Tile is a quick access point where users can access and review <u>all</u> pending approval transactions. A counter displays on the tile indicating the number of transactions requiring user action. Upon opening, a summary list of all pending transactions is displayed. The summary list can be filtered by transaction type to facilitate ease of review and action.

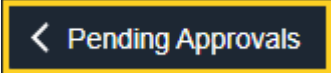


Step	Action
2.	In this exercise, the user will <i>add</i> the <i>Approving Tile</i> to the My Financials Home page. Begin by selecting the Actions icon (3 stacked dots). Click the Actions menu. 

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Step	Action
3.	Click the Personalize Homepage link. 
4.	Click the Add Tile button. 
5.	Click the PeopleSoft Common Architecture link. 
6.	Click the Approvals link. 
7.	The Approval Tile has been added to the My Financials Home page. Users <u>must</u> Save to complete the process. Click the Save button. 
8.	The Approvals tile is displayed on the My Financials Home page. A "5" appears in the lower right corner of the tile indicating the <i>number of transactions</i> the user has pending. Click the Approvals Tile button.
9.	The View By option defaults as Type. This allows the pending transactions to be filtered by type for ease of review and action. Other filter options are available on the drop-down menu: Date Routed , From , Priority , and Requester . The All option has a counter on the right side of the button. This <i>indicates the total number of pending transactions of any type</i> the user has. All filtered options will have a counter in the lower right corner. In this example, the Requisition option <i>indicates the total number of requisition actions</i> the user has pending.
10.	Users can select a transaction from the All list or select the Requisition , or other transaction type, option to choose an option from that list. Click the Requisition 0068247 button.

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Step	Action
11.	The requisition displays. Notice that the user can <i>Approve</i>, <i>Deny</i>, or place the requisition on <i>Hold</i> from the page. Click the Pending Approvals button. 
12.	Click the Home button. 
13.	This completes <i>The Approving Tile</i>. End of Procedure.