

PEOPLESOFT APPROVER GUIDE

The Approver's role in the Procurement Process is to confirm the financial commitment of funds for the requested purchases. A thoughtful and careful review of staff purchasing requests ensures responsible allocation of funds, alignment with departmental goals and accurate submissions. The Approver should:

- Review departmental budget to ensure fund availability.
- Evaluate if the purchase aligns with department objectives.
- Assess information provided by the requester in PeopleSoft.
- Address any questionable aspects before approval.
- Submit approval in a timely manner to advance purchases.

Best Practice Review Steps:

1. Clarify Expectations for staff who make purchases in your department:
 - Communicate clearly with staff submitting requests about required information
 - Set expectations for completeness and accuracy of request submissions for informed decision-making.
 - Provide continuous training and feedback to staff submitting requests for improvement.
 - Stay updated on procurement policies and procedures for effective decision-making.
2. Evaluate Requests based on:
 - Budget availability and departmental benefit.
 - Review additional documents attached.
 - Verify the compliance of the purchase with university procurement guidelines.
 - Address any discrepancies or uncertainties before granting approval.
3. Keep the workflow process moving with timely review and approval.
 - Staff depend on thoughtful and timely approval to obtain their materials.
 - Time-sensitive requests that are delayed/late may be denied requiring additional documentation which delay the purchase.
 - Develop a routine for approval review that does not disrupt your busy work schedule.
4. Key Action Steps when Reviewing the Approval Request:
 - Under the "Payment Request Details" review documents in the "Attachments." Open to inspect the purchase quote, invoice or receipt. This should reveal key information related to the purchase.
 - Determine if the cost of purchase or the vendor raise concerns.
 - Confirm quote/invoice details match entry details in the submission request?