

PO.020.160 – APPROVING A PURCHASE ORDER

Purpose	To approve a purchase order.
Description	<p>When purchase orders are created, the status is 'Open' or 'Pending Approval.' Purchase orders must be in an Approved status to be processed fully. Purchase order approval is the first step in the transaction processing.</p> <p>Approval action can be taken from multiple navigations: from the Purchase Order Approval page, the Approve POs page and/or the Worklist.</p>
Security Role	BOR_PO_APPROVE BOR_PO_BUYER_APPR BOR_PO_BUD_REF_APPROVAL (Budget Reference) BOR_PO_ASSET_APPR (Asset) BOR_PO_MAINTAIN (needed if approving from Add/Update POs page)
Dependencies/ Constraints	The Purchase Order must have a status of "Pending Approval" for it to be made available for approval.
Additional Information	<ul style="list-style-type: none"> • Approvers may wish to run and view the results of the POX4013 - PO Listing by Status Report to determine what Purchase Orders are in the system awaiting approval. For more information, see the eProcurement and Purchasing Queries and Reports document. • Every purchase order will route to the Buyer approval level. The Asset and Budget Reference approval levels are triggered when certain information is added to the purchase order and needs further review. For more information, see the Purchasing Workflow Approval job aid.

Procedure

Below are step by step instructions on how take approval action on a purchase order from the Worklist.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Worklist link.
4.	Click the My Worklist – Summary View link.
5.	Under the Link column, select a purchase order from the results list to review for approval. The system navigates to the Purchase Order Approvals page. <i>Note: if the system navigates to the View Approvals page, then this purchase order is either not available for the user's approval or it has already been approved.</i>
6.	To review purchase order comments and attachments, click the View Comments and Attachments link.
7.	To review what information will display on the purchase order to the supplier, select the checkbox next to the purchase order line and then click the View Line Details button. The system will display an unauthorized version of the purchase order.
8.	Select each purchase order line to mark for approval action. <i>Note: If users want to take the same action all purchase order lines, click the select all checkbox to mark all lines.</i>

Step	Action
9.	<p>After purchase order is reviewed, select one of the following options:</p> <ul style="list-style-type: none"> • Approve: moves the purchase order to the next level in the approval workflow. • Hold: prevents the purchase order from moving to the next level in the approval workflow. Typically, this is done when more information is needed from the Buyer. The On Hold status is functional in that a PO will be prevented from routing through approvals while On Hold. <p>The Hold is only removed when the Approver chooses to approve or deny the PO, or when the purchase order is updated in such a way that the approval process is restarted.</p> <p><i>Note: When updating a PO where workflow is in an On Hold status, the workflow will reference an “Information Request.” This functionality is currently not available in GeorgiaFIRST Financials, so an Information Request will not be routed to the buyer.</i></p> <ul style="list-style-type: none"> • Deny: users should not deny individual PO lines. POs in their entirety should be marked as Denied. This action can only be taken for the Buyer level of approval. Not available for Asset or Budget Reference approvals.
10.	Verify the PO status changed to the option selected from the previous step.

Below are step by step instructions on how to take approval action on a purchase order from the Add/Update PO page.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Add/Update POs link.
6.	Click the Find an Existing Value tab.
7.	Enter or search for the purchase order in the PO ID field.
8.	From the Add/Update POs page, navigate to the bottom of the page and click on the Purchase Order Approvals link. The system navigates to the Purchase Order Approvals page.
9.	To review what information will display on the purchase order to the supplier, select the checkbox next to the purchase order line and then click the View Line Details button. The system will display an unauthorized version of the purchase order.
10.	Select each purchase order line to mark for approval action. <i>Note: if users want to take the same action all purchase order lines, click the select all checkbox to mark all lines.</i>

Step	Action
11.	<p>Choose one of the following approval actions:</p> <ul style="list-style-type: none"> • Approve: moves the purchase order to the next level in the approval workflow. • Hold: prevents the purchase order from moving to the next level in the approval workflow. Typically, this is done when more information is needed from the Buyer. The On Hold status is functional in that a PO will be prevented from routing through approvals while On Hold. <p>The Hold is only removed when the Approver chooses to approve or deny the PO, or when the purchase order is updated in such a way that the approval process is restarted.</p> <p><i>Note: When updating a PO where workflow is in an On Hold status, the workflow will reference an "Information Request." This functionality is currently not available in GeorgiaFIRST Financials, so an Information Request will not be routed to the buyer.</i></p> <ul style="list-style-type: none"> • Deny: users should not deny individual PO lines. POs in their entirety should be marked as Denied. This action can only be taken for the Buyer level of approval. Not available for Asset or Budget Reference approvals.
12.	Verify the PO status changed to the option selected from the previous step.

Below are step by step instructions on how to take approval action on a purchase order from the Approve POs page.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Approve POs link.
6.	Verify the system populates the correct business unit in the Business Unit field.
7.	Verify the system populates ' Pending ' in the Approval Status dropdown.
8.	Enter any additional criteria to narrow the search results.
9.	Click Search to find all POs and PO lines awaiting approval.
10.	Click the Expand All icon and review POs and PO lines awaiting approval.

Step	Action
11.	<p>Users can select one of the following options from the dropdown menu next to each purchase order.</p> <p>Note: <i>If a user would like to take the same action on all POs listed, select an action at the bottom of the page and the system will update all POs listed to that status.</i></p> <ul style="list-style-type: none"> • Approve: moves the purchase order to the next level in the approval workflow. • Hold: prevents the purchase order from moving to the next level in the approval workflow. Typically, this is done when more information is needed from the Buyer. The On Hold status is functional in that a PO will be prevented from routing through approvals while On Hold. <p>The hold is removed when the Approver chooses to approve or deny the PO, or when the purchase order is updated in such a way that the approval process is restarted.</p> <p>Please be aware that if users want to place more than one PO on Hold, then the required comments entered here will be entered on each of the POs you want to place On Hold. Therefore, if the comment does not relate to every PO, users may not want to hold in mass</p> <p>Note: <i>When updating a PO where workflow is in an On Hold status, the workflow will reference an “Information Request.” This functionality is currently not available in GeorgiaFIRST Financials, so an Information Request will not be routed to the buyer.</i></p> <ul style="list-style-type: none"> • Deny: users should not deny individual PO lines. POs in their entirety should be marked as Denied. If users want to deny more than one PO, the required comments will be entered on all of the POs denied. Therefore, if the comment does not relate to every PO, you may not want to deny in mass. This action can only be taken for the Buyer level of approval. Not available for Asset or Budget Reference approvals. •
12.	<p>If users would like to act on a single PO line, select the PO ID link and the system will navigate to the Purchase Order Approvals page. Approval action can be taken from here.</p>
13.	<p>Click Submit. The Submit Confirmation page pop-up window displays.</p>

Step	Action
14.	To view the details of every PO and PO line being approved, click the expand icon on the Details line.
15.	If needed, click the expand icon on the Comments (Optional) line and enter comments.
16.	Click the OK button.
17.	Verify the PO status changed to the option selected from the previous step.