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PO.020.161 – PO Mass Approvals

Concept

This topic demonstrates how to use the Approve Purchase Orders page. This page adds the convenience and the ability to Approve, place On Hold, and Deny Purchase Orders in multiples.

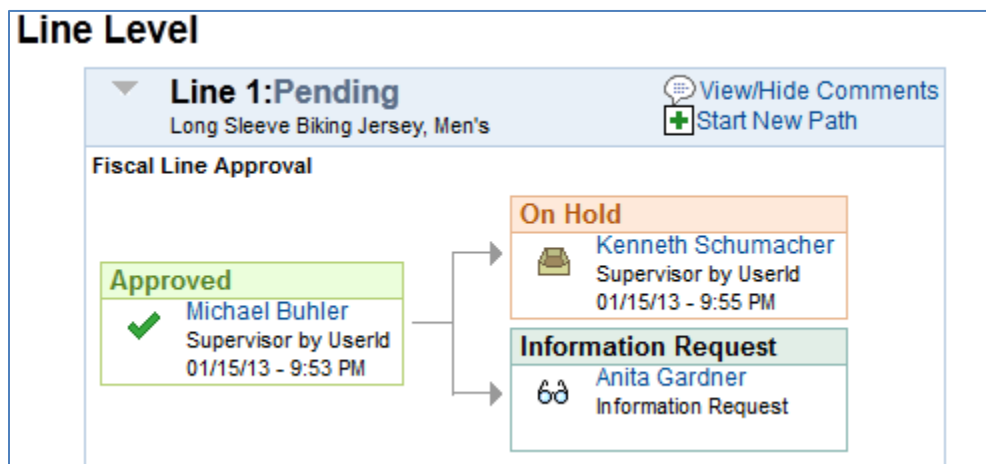
Topic Objective:

Upon completion of this topic, you will be able to use the Approve Purchase Orders page to:

- Review POs currently Pending Approval
- Approve POs and PO lines in mass, or individually.
- Place POs and PO lines On Hold in mass, or individually.
- Deny POs in mass, or individually.
- Add or remove ad hoc approvers from a PO's workflow

Additional Information

1. Please note that the On Hold workflow status discussed in this document is different from the Hold From Further Processing checkbox on the Maintain Purchase Order page.
2. You may notice 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. The On Hold status is functional in that a PO will be prevented from routing through approvals while On Hold.



3. You may notice in the Action/Status column that some POs have a drop-down menu with options, and some do not. When a drop-down menu is available, it means that you are the final approver for the PO.

When a drop-down menu does not exist, it means that you are authorized to approve one or more of the PO's lines, but you are not the final approver for the PO.

Search Clear

Purchase Orders

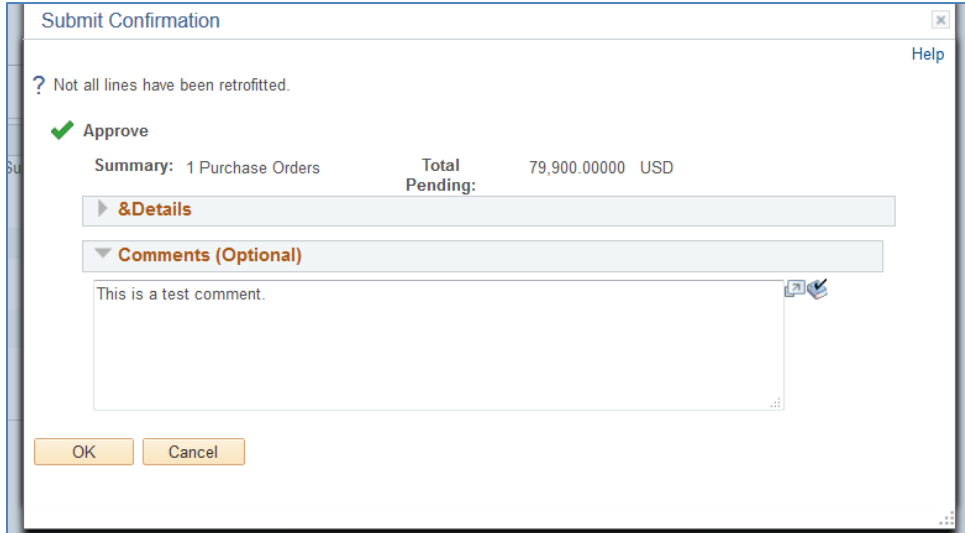
To approve or deny one or more POs, select the appropriate action from the dropdown and click Submit.
 To view the PO details, click the PO ID link.

▼ Expand All ► Collapse All

Action/Status	PO ID	PO Date	Buyer	PO Reference	PO Total	Supp ID	Supplier Name
▶ ⌚ Approve	0000522186	11/08/2016	GJEFFERS		3,000.00 USD	0000416277	CUSTOMWAST-001
▶ ⌚ Pending	0000522230	11/11/2016	kwood		4,818.00 USD	0000407685	PROCURE-001

☒ Approve
 ☐ Hold
 ☒ Deny

- Please note that when the optional comments are added on the Submit Confirmation page, they are not being added onto the PO itself. They are simply added as a comment in the approval workflow history.



Submit Confirmation

? Not all lines have been retrofitted.

Help

✓ Approve

Summary: 1 Purchase Orders

Total Pending:	79,900.00000	USD
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&Details

Comments (Optional)

This is a test comment.

OK Cancel

Procedure

How to Approve Purchase Orders and Purchase Order Lines in Mass

Step	
1.	Click the Purchasing link.
2.	Click the Purchase Orders link.
3.	Click the Approve POs link.
4.	Notice in the search criteria, the Approval Status field is already set to Pending . Click Search to find all POs and PO lines awaiting your approval.
5.	Click the Expand All link and review POs and PO lines awaiting approval. Please read note 2 under Additional Information above.
6.	Click Approve . Notice all POs and PO lines awaiting approval change to a status of Approve.
7.	Click Submit .
8.	See the Submit Confirmation page pop-up window. To view the details of every PO and PO line being approved, click the expand icon on the Details line.
9.	If desired, click the expand icon on the Comments (Optional) line and enter comments.
10.	Click OK . The POs and PO lines are Approved.

How to Approve Individual POs and PO Lines

Step	
1.	Click the Purchasing link.
2.	Click the Purchase Orders link.
3.	Click the Approve POs link.
4.	Notice in the search criteria, the Approval Status field is already set to Pending . Click Search to find all POs and PO lines awaiting your approval.
5.	Click the Expand All link and review POs and PO lines awaiting approval. Please read note 2 under Additional Information above.

Step	
6.	Review all POs and PO lines pending your approval. Use the drop-down menus to manually select Approve for each PO and/or PO line which you are ready to approve. If you choose not to approve some of the POs and PO lines, they will remain here as Pending until you are ready to approve them.
7.	Click Submit .
8.	See the Submit Confirmation page pop-up window. To view the details of every PO and PO line being approved, click the expand icon on the Details line.
9.	If desired, click the expand icon on the Comments (Optional) line and enter comments.
10.	Click OK . The POs and PO lines you selected individually are Approved.

How to Place Purchase Orders and Purchase Order Lines On Hold in Mass

The On Hold action gives the Approver time to research an issue and prevents the approval process from going to the next approval step until the Approver takes action on the purchase order or purchase order line.

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.

Please be aware that if you want to place more than one PO or PO line On Hold, then the required comments you enter will be entered on each of the POs you want to place On Hold. Therefore, if the comment does not relate to every PO, you may not want to hold in mass.

Step	
1.	Click the Purchasing link.
2.	Click the Purchase Orders link.
3.	Click the Approve POs link.
4.	Notice in the search criteria, the Approval Status field is already set to Pending . Click Search to find all POs and PO lines awaiting your approval.

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Step	
5.	Click the Expand All link and review POs and PO lines awaiting approval. Please read note 2 under Additional Information above.
6.	Click Hold . Notice all POs and PO lines awaiting approval change to a status of Hold.
7.	Click Submit .
8.	See the Submit Confirmation page pop-up window. To view the details of every PO and PO line being placed on Hold, click the expand icon on the Details line.
9.	Click the expand icon on the Comments (Required) line and enter comments explaining why you are putting the POs and PO lines on Hold. You must enter comments here.
10.	Click OK . The POs and PO lines are now On Hold. The Hold is removed when either the Approver chooses to approve or when the purchase order is updated in such a way that the approval process is restarted.

How to Place Individual Purchase Orders and Purchase Order Lines On Hold

Step	
1.	Click the Purchasing link.
2.	Click the Purchase Orders link.
3.	Click the Approve POs link.
4.	Notice in the search criteria, the Approval Status field is already set to Pending . Click Search to find all POs and PO lines awaiting your approval.
5.	Click the Expand All link and review POs and PO lines awaiting approval. Please read note 2 under Additional Information above.
6.	Review all POs and PO lines pending your approval. Use the drop-down menus to manually select Hold for each PO and/or PO line which you would like to place On Hold. If you choose not to work on some of the POs and PO lines, they will remain here as Pending until you are ready to work on them later on.

Step	
7.	Click Submit .
8.	See the Submit Confirmation page pop-up window. To view the details of every PO and PO line being placed on Hold, click the expand icon on the Details line.
9.	Click the expand icon on the Comments (Required) line and enter comments explaining why you are putting the POs and PO lines on Hold. You must enter comments here.
10.	Click OK . The POs and PO lines are now On Hold. The Hold is removed when either the Approver chooses to approve or when the purchase order is updated in such a way that the approval process is restarted.

How to Remove a PO Out of On Hold Status

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.

Step	
1.	Click the Purchasing link.
2.	Click the Purchase Orders link.
3.	Click the Approve POs link.
4.	Change the Approval Status search field to On Hold . Click Search .
5.	Click the PO ID of the PO you wish to remove from On Hold status.
6.	On the Purchase Order Approval page, select either Approve or Deny . If you choose to deny the PO, you must enter comments as to why it is being denied.
7.	The Purchase Order status changes to either Approved or Denied.

How to Deny Purchase Orders in Mass

Please note that you cannot deny individual PO lines. POs can only be marked as Denied at the header level.

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Please be aware that if you want to deny more than one PO, the required comments you enter will be entered on each of the POs denied. Therefore, if the comment does not relate to every PO, you may not want to deny in mass.

Step	
1.	Click the Purchasing link.
2.	Click the Purchase Orders link.
3.	Click the Approve POs link.
4.	Notice in the search criteria, the Approval Status field is already set to Pending . Click Search to find all POs and PO lines awaiting your approval.
5.	Click the Expand All link and review POs and PO lines awaiting approval. Please read note 2 under Additional Information above.
6.	Click Deny . Notice all POs and PO lines awaiting approval change to a status of Deny.
7.	Click Submit .
8.	See the Submit Confirmation page pop-up window. To view the details of every PO and PO line being denied, click the expand icon on the Details line.
9.	Click the expand icon on the Comments (Required) line and enter comments explaining why you are denying the POs. You must enter comments here.
10.	Click OK . The POs are now Denied.

How to Add Ad Hoc Approvers from a PO's Workflow

Step	
1.	Click the Purchasing link.
2.	Click the Purchase Orders link.
3.	Click the Approve POs link.

Step	
4.	Notice in the search criteria, the Approval Status field is already set to Pending . Click Search to find all POs and PO lines awaiting your approval.
5.	Click on the link of the PO ID for which you'd like to take action.
6.	On the Purchase Order Approval page, click the green plus sign on the workflow level on which you'd like to insert an Approver.
7.	Enter the User ID of the person you wish to add as an ad hoc approver.
8.	On the Insert as option , ensure it's marked as Approver . Click Insert .
9.	Click the Apply Approval Changes button.
10.	The Approver is now inserted as an ad hoc Approver. Repeat as many times as necessary to add multiple ad hoc Approvers.

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How to Remove Ad Hoc Approvers from a PO's Workflow

Step	
1.	Click the Purchasing link.
2.	Click the Purchase Orders link.
3.	Click the Approve POs link.
4.	Notice in the search criteria, the Approval Status field is already set to Pending . Click Search to find all POs and PO lines awaiting your approval.
5.	Click on the link of the PO ID for which you'd like to take action.
6.	On the Purchase Order Approval page, click the red minus icon on an inserted Approver you would like to remove from the workflow.
7.	Receive the verification message, "Are you sure you want to remove XXXXXXXX from the approval chain?" Press OK .
8.	Click the Apply Approval Changes button.
9.	The Approver is now removed as an ad hoc Approver. Repeat as many times as necessary to remove inserted ad hoc Approvers.