



Version	9.0
Document Generation Date	2/16/2009
Last Changed by	System Office
Status	Final

Approving & Denying PO Amounts

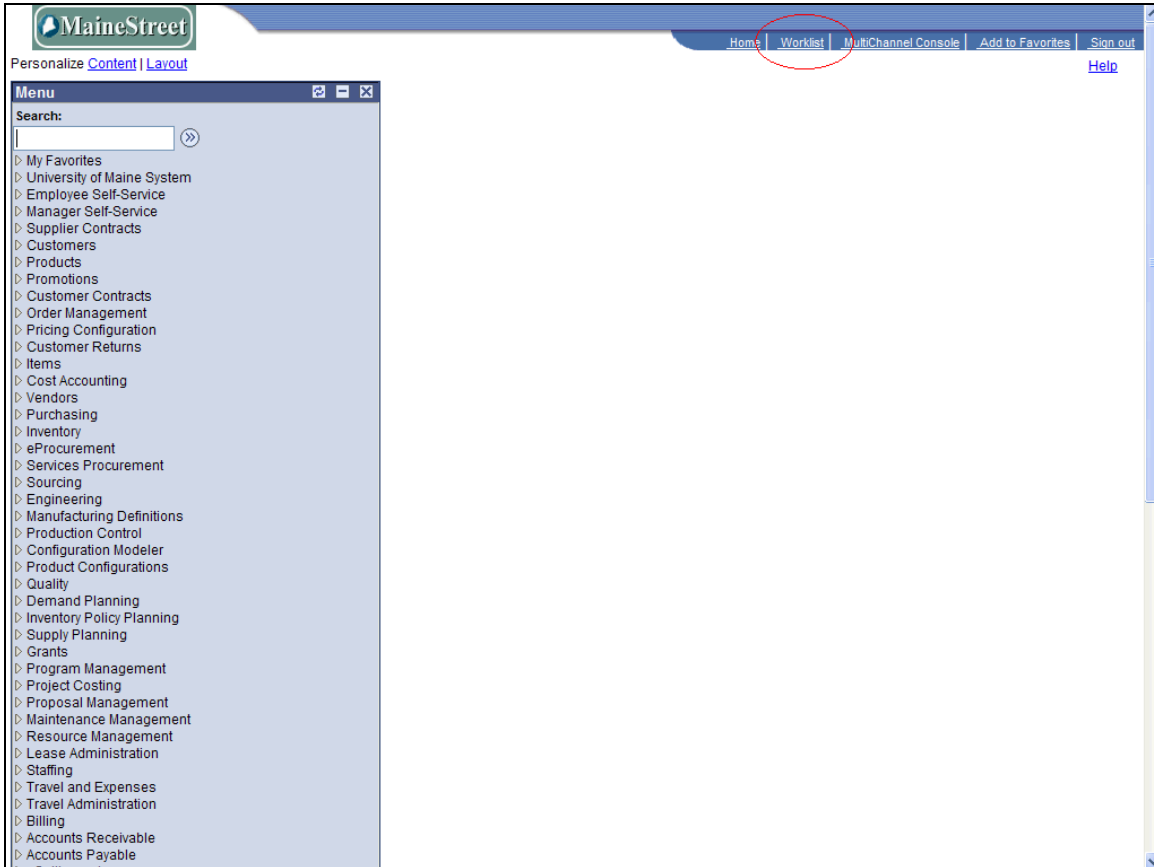
Concept

After a purchase order has been entered, it can be approved or denied. Based on your business processes and system setup, you may be required to approve purchase orders before the process can continue.

If the business unit is configured such that the purchase order amount must be approved separately from the purchase order data entry, the purchase order status is set to *Pending Approval*.

In this topic, your business organization is configured such that you need to approve, deny or recycle a purchase order before any other transaction takes place.

Procedure



Step	Action
1.	From the Financials navigation bar, click the Worklist link to open your Worklist page. Worklist



Process Document

Financials 9.0: Approving & Denying PO Amounts

Worklist for 0099999

Detail View Work List Filters: [dropdown]

From	Date From	Work Item	Worked By Activity	Priority	Link			
Batch Processor ID	07/09/2008	Req Approval Worklist	UMS08 Requisition Amount Approval	[dropdown]	111498_UMS08_8000000843	Mark Worked	Reassign	Co
Approver Name	07/22/2008	Approver	PO Amount Approvals	[dropdown]	111515_UMS05_5000035874	Mark Worked	Reassign	Co
Batch Processor ID	07/21/2008	PO Dispatched	PO Report Distribution	[dropdown]	7895_0010051	Mark Worked	Reassign	Co

Refresh

Step	Action
2.	On your Worklist page, in the Worked By Activity column, look for PO Amount Approvals items. Click on the link for the item in the Link column to open the Purchase Order Amount Approval page.

Process Document

Financials 9.0: Approving & Denying PO Amounts



MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Purchase Order Amount Approval

Unit: UMS05 PO ID: 5000035874 Vendor: 000000011

*Approval Action: Approval Status: In Process

Comment

PO Amount

Buyer: Buyer Name

PO Reference:

PO Date: 07/22/2008

Merchandise Total Amount: 60,000.00 USD Merchandise Total Base: 60,000.00 USD

PO Total Value: 60,000.00 PO Total Base: 60,000.00

Lines Customize | Find | View All | First 1 of 1 Last

Line	Sched	UOM	PO Qty	Amount	Currency	Base Amt	Base Currency	Description
1	1	EA	1.0000	60000.00	USD	60000.00	USD	test

Distributions/ChartFields Customize | Find | View All | First 1 of 1 Last

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	60000.000	UMS05	5745100	61000		00			

Step	Action
3.	Use the Purchase Order Amount Approval page to view details and approve amounts for purchase orders that require your approval. The amounts that appear are the amounts that you are approving. You can change these values on the Purchase Order and Schedules pages.



Process Document

Financials 9.0: Approving & Denying PO Amounts

Step	Action
4.	<p>In the PO Amount section of the page, the Buyer's name and the PO Date displays along with the following information:</p> <p>Merchandise Total Amount - displays the quantity of items multiplied by the unit price in the purchase order currency.</p> <p>Merchandise Total Base - displays the quantity of items multiplied by the unit price in the base currency for the business unit.</p> <p>PO Total Value - displays the merchandise total amount plus taxes, freight, and miscellaneous charges in the purchase order currency.</p> <p>PO Total Base - displays the merchandise total amount plus taxes, freight, and miscellaneous charges in the base currency for the business unit.</p>

Process Document

Financials 9.0: Approving & Denying PO Amounts



MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

Purchase Order Amount Approval

Unit: UMS05 PO ID: 5000035874 Vendor: 0000000011

*Approval Action: Approval Status: In Process

Comment

PO Amount

Buyer: Buyer Name

PO Reference:

PO Date: 07/22/2008

Merchandise Total Amount: 60,000.00 USD Merchandise Total Base: 60,000.00 USD


PO Total Value: 60,000.00 PO Total Base: 60,000.00

Lines Customize | Find | View All | First 1 of 1 Last

Line	Sched	UOM	PO Qty	Amount	Currency	Base Amt	Base Currency	Description
1	1	EA	1.0000	60000.00	USD	60000.00	USD	test

Distributions/ChartFields Customize | Find | View All | First 1 of 1 Last

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	60000.00	UMS05	5745100	61000		00			

Step	Action
5.	Click the <i>Expand Lines</i> button to expand the Lines section. 



Process Document

Financials 9.0: Approving & Denying PO Amounts

Step	Action
6.	<p>You can view line detail information for the PO in the <i>Lines</i> section.</p> <p>The <i>Distributions/ChartFields</i> section displays account information for the PO.</p>

Process Document

Financials 9.0: Approving & Denying PO Amounts



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page

Purchase Order Amount Approval

Unit: UMS05 PO ID: 5000035874 Vendor: 0000000011

*Approval Action: **Approve** Approval Status: In Process

Comment

PO Amount

Buyer: Buyer Name

PO Reference:

PO Date: 07/22/2008

Merchandise Total Amount: 60,000.00 USD Merchandise Total Base: 60,000.00 USD

PO Total Value: 60,000.00 PO Total Base: 60,000.00

Lines

Line	Sched	UOM	PO Qty	Amount	Currency	Base Amt	Base Currency	Description
1	1	EA	1.0000	60000.00	USD	60000.00	USD	test

Distributions/ChartFields

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	60000.000	UMS05	5745100	61000		00			

Save View Worklist Previous in Worklist Next in Worklist Notify

Step	Action
7.	<p>The Approval Action field enables you to change the purchase order's approval status so the purchase order moves to the next step in the approval process. You can select one of the following: <i>Approve</i>, <i>Deny</i>, or <i>Recycle</i>.</p> <p>If you select Approve and then Save, the PO is either Approved or it is sent on to the next approver for their approval.</p> <p>If you select Recycle and then Save, the purchase order is sent back to the person who last acted on the purchase order. They will access it from their Worklist and adjust the purchase order.</p> <p>If you select Deny, the purchase order is denied.</p> <p>In each case, you have the opportunity to add your comments in the Comment box.</p>



Process Document

Financials 9.0: Approving & Denying PO Amounts

Purchase Order Amount Approval

Unit: UMS05 PO ID: 5000035874 Vendor: 0000000011

*Approval Action: **Approve** Approval Status: In Process

Comment

PO Amount

Buyer: Buyer Name

PO Reference:

PO Date: 07/22/2008

Merchandise Total Amount: 60,000.00 USD Merchandise Total Base: 60,000.00 USD

PO Total Value: 60,000.00 PO Total Base: 60,000.00

Lines

Line	Sched	UOM	PO Qty	Amount	Currency	Base Amt	Base Currency	Description
1	1	EA	1.0000	60000.00	USD	60000.00	USD	test

Distributions/ChartFields

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	60000.000	UMS05	5745100	61000	00			

Save View Worklist Previous in Worklist Next in Worklist Notify

Step	Action
8.	Click the Approval Action drop-down arrow.

Process Document

Financials 9.0: Approving & Denying PO Amounts



[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)
[New Window](#) | [Help](#) | [Customize Page](#)

Purchase Order Amount Approval

Unit: UMS05 PO ID: 5000035874 Vendor: 0000000011
 *Approval Action: Approve Approval Status: In Process
 Comment:

PO Amount
 Buyer: Buyer Name
 PO Reference:
 PO Date: 07/22/2008
 Merchandise Total Amount: 60,000.00 USD Merchandise Total Base: 60,000.00 USD
 PO Total Value: 60,000.00 PO Total Base: 60,000.00

Line	Sched	UOM	PO Qty	Amount	Currency	Base Amt	Base Currency	Description
1	1	EA	1.0000	60000.00	USD	60000.00	USD	test

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	60000.000	UMS05	5745100	61000		00			

Step	Action
9.	For this example, we'll deny the purchase order. Click on Deny to select it. <input type="button" value="Deny"/>



Process Document

Financials 9.0: Approving & Denying PO Amounts

MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Purchase Order Amount Approval

Unit: UMS05 PO ID: 5000035874 Vendor: 0000000011

*Approval Action: Approval Status: In Process

Comment

PO Amount

Buyer: Buyer Name

PO Reference:

PO Date: 07/22/2008

Merchandise Total Amount: 60,000.00 USD Merchandise Total Base: 60,000.00 USD

PO Total Value: 60,000.00 PO Total Base: 60,000.00

Lines

Line	Sched	UOM	PO Qty	Amount	Currency	Base Amt	Base Currency	Description
1	1	EA	1.0000	60000.00	USD	60000.00	USD	test

Distributions/ChartFields

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	60000.000	UMS05	5745100	61000		00			

Save View Worklist Previous in Worklist Next in Worklist Notify

Step	Action
10.	When you <i>Deny</i> or <i>Recycle</i> a purchase order, you should enter a comment in the <i>Comment</i> field that explains the reason for the action.
11.	In this example, we denied the purchase order because the item is no longer on the approved list, so we'll enter the following note in the <i>Comments</i> field: Item no longer on the approved list.

Process Document

Financials 9.0: Approving & Denying PO Amounts



MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Purchase Order Amount Approval

Unit: UMS05 PO ID: 5000035874 Vendor: 0000000011

*Approval Action: Approval Status: In Process

Comment
Item no longer on the approved list

PO Amount

Buyer: Buyer Name
PO Reference:
PO Date: 07/22/2008
Merchandise Total Amount: 60,000.00 USD Merchandise Total Base: 60,000.00 USD
PO Total Value: 60,000.00 PO Total Base: 60,000.00

Lines Customize | Find | View All | First | 1 of 1 | Last

Line	Sched	UOM	PO Qty	Amount	Currency	Base Amt	Base Currency	Description
1	1	EA	1.0000	60000.00	USD	60000.00	USD	test

Distributions/ChartFields Customize | Find | View All | First | 1 of 1 | Last

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	60000.000	UMS05	5745100	61000		00			

Step	Action
12.	Click the Save button.



Process Document

Financials 9.0: Approving & Denying PO Amounts

MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | Help

Purchase Order Amount Approval

Unit: UMS05 PO ID: 5000035874 Vendor: 0000000011

*Approval Action: Approval Status: Denied

Comment
Item no longer on the approved list.

PO Amount

Buyer: Buyer Name

PO Reference:

PO Date: 07/22/2008

Merchandise Total Amount: 60,000.00 USD Merchandise Total Base: 60,000.00 USD

PO Total Value: 60,000.00 PO Total Base: 60,000.00

Lines

Line	Sched	UOM	PO Qty	Amount	Currency	Base Amt	Base Currency	Description
1	1	EA	1.0000	60000.00	USD	60000.00	USD	test

Distributions/ChartFields

Line	Sched	Distrib	Status	Distrib by	Qty	Amount	GL Unit	Dept	Account	Class	Fund	Program	Project	Oper Unit
1	1	1	Open	Qty	1.0000	60000.000	UMS05	5745100	61000		00			

Save | View Worklist | Previous in Worklist | Next in Worklist | Notify

Step	Action
13.	<p>After selecting Save, notice that in this example, the Approval Status changed from <i>In Process</i> to <i>Denied</i>. You have successfully denied the purchase order amount for a purchase order.</p> <p>If you have authority for final approval and approve the purchase order, the Approval Status changes from <i>Initial</i> to <i>Complete</i>. If you do not have the authority to complete the approval or if you deny or recycle the purchase order, the Approval Status remains <i>In Process</i> and routes to the next role user in the approval definition.</p>
14.	End of Procedure.