PeopleSoft Training Document

Financials 9.2

Approve a Purchase Order

Functional Area	PeopleSoft Finance Purchasing
Process Area	Approver with DFA
Processes covered in this document	1.1.1 Approve a Purchase Order 1.1.2 On Hold and Deny PO's 1.1.3 Viewing Status
Process Map Reference	Unitec Processes 9.2

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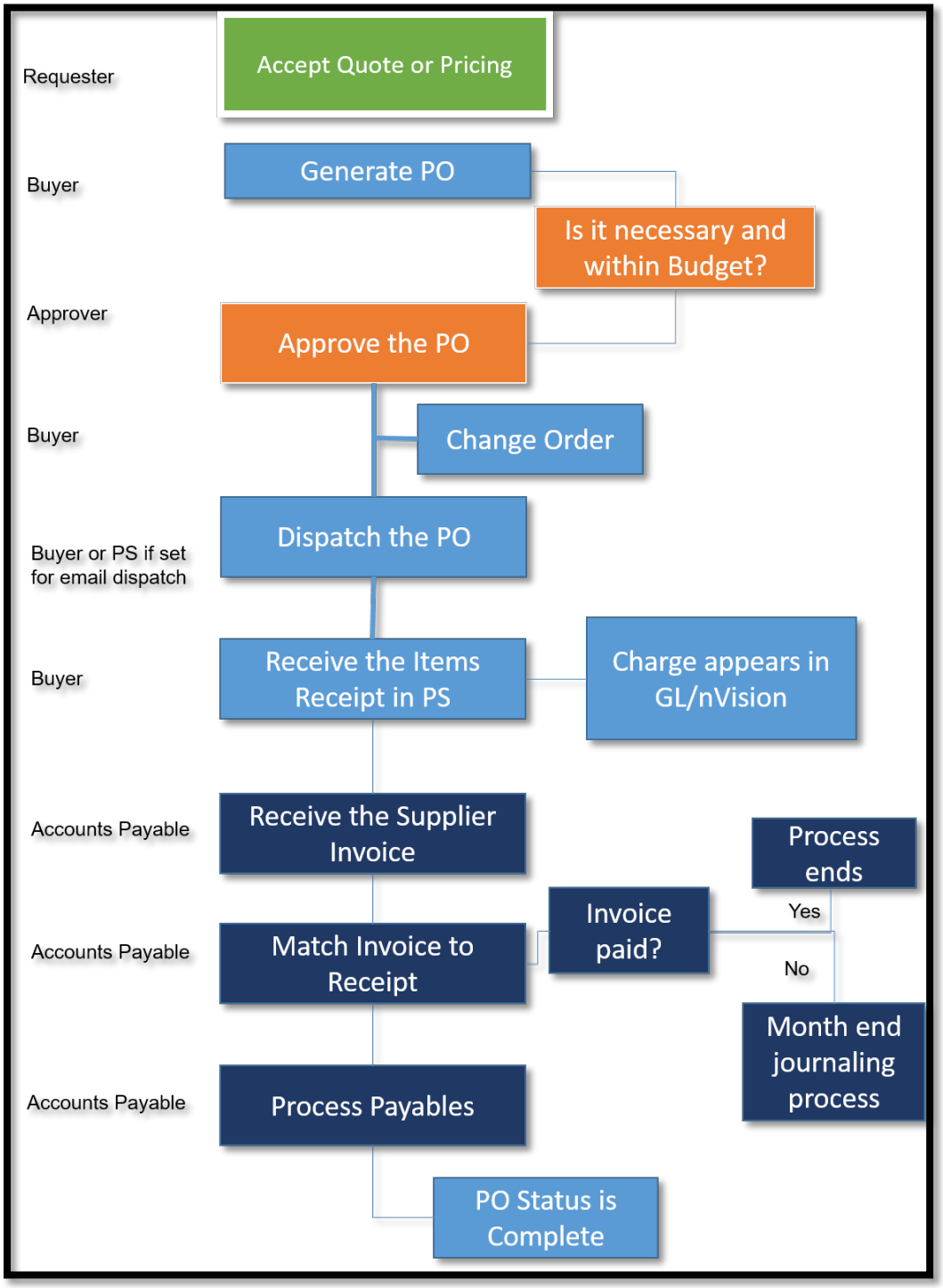
	By approving a Purchase Order, you confirm that you have reviewed it and that the spend is in line with Unitec Policy and the relevant budgets. It is a commitment to spend.

PO Life Cycle

	Once a Purchase Order has been created, it is saved. PeopleSoft then sends an email with a link to the PO to the person with Delegated Financial Authority (DFA) for approval. Purchase Orders need to be approved before they are sent to the supplier.

Sequence of Events in the Purchasing Process



Approve a Purchase Order

Introduction

Before a Purchase Order is sent to a supplier, it must be approved in PeopleSoft by a PO approver with the appropriate Delegated Financial Authority (DFA).

By approving a Purchase Order, you confirm that you have reviewed it and that the spend is in line with Unitec Policy and the relevant budgets. It is a commitment to spend.

Workflows for PO approval are configured by IMS after approval from the Procurement Team. There are two types of workflows:

The default is for the PO to take the routing configured for the cost centre the PO is being charged to. However, if a PO is for more than one cost centre, or for the cost code 10ZX (usually only associated with CAPEX purchases), then the Purchase Order will take the secondary approval routing which depends on the buyer who raised the PO. This is buyer routing.

If you feel that the routing for an order is incorrect, or you need to organise a temporary change to the routing to cover for annual leave, please log a request via the IMS Self Service link on the NEST, or ring the IMS Helpdesk, or send an email to the Unitec procurement team.

Objective

Understand the different approval statuses that are available for a Purchase Order. Options are:

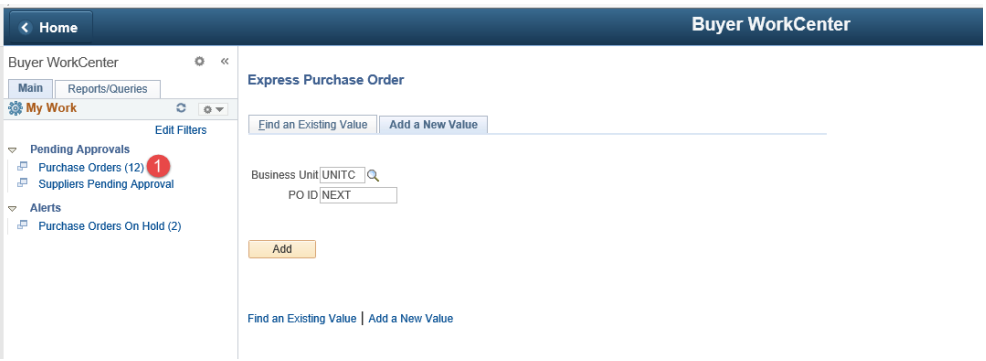
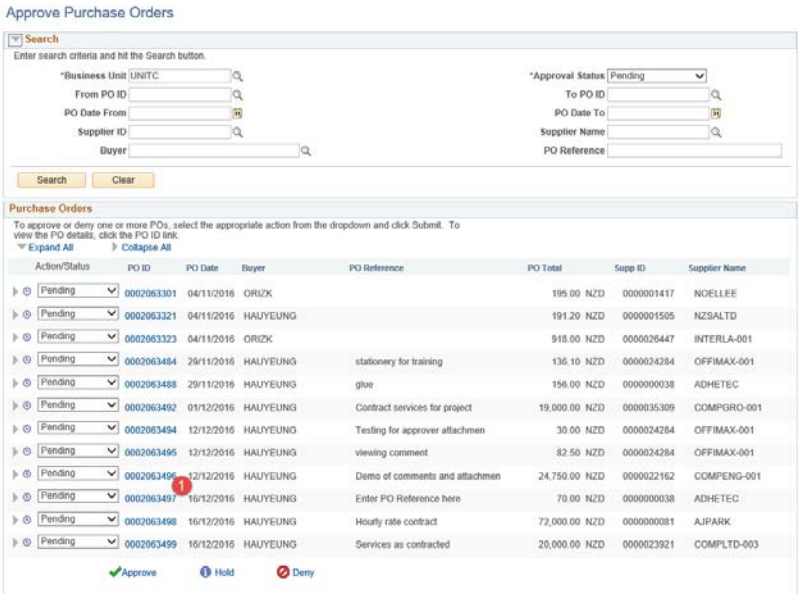
- Approve
- Deny
- On Hold

Approvers will receive one reminder email if they have not actioned the approval after 60 hours. If the PO is still not approved, it will remain unapproved in the system. No further emails will be sent.

Accessing PO's for Approving

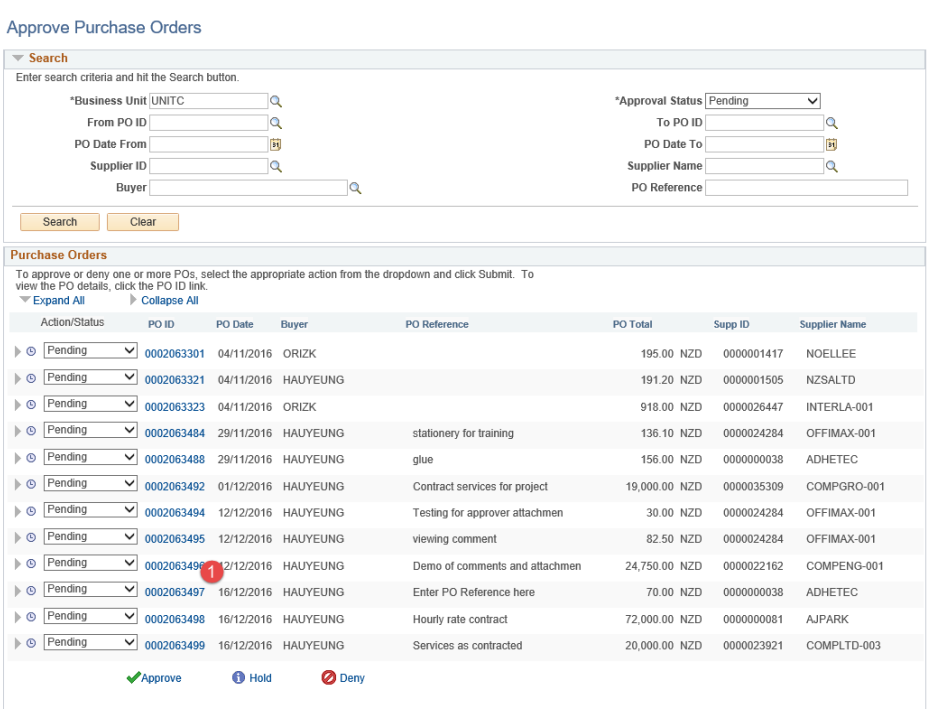
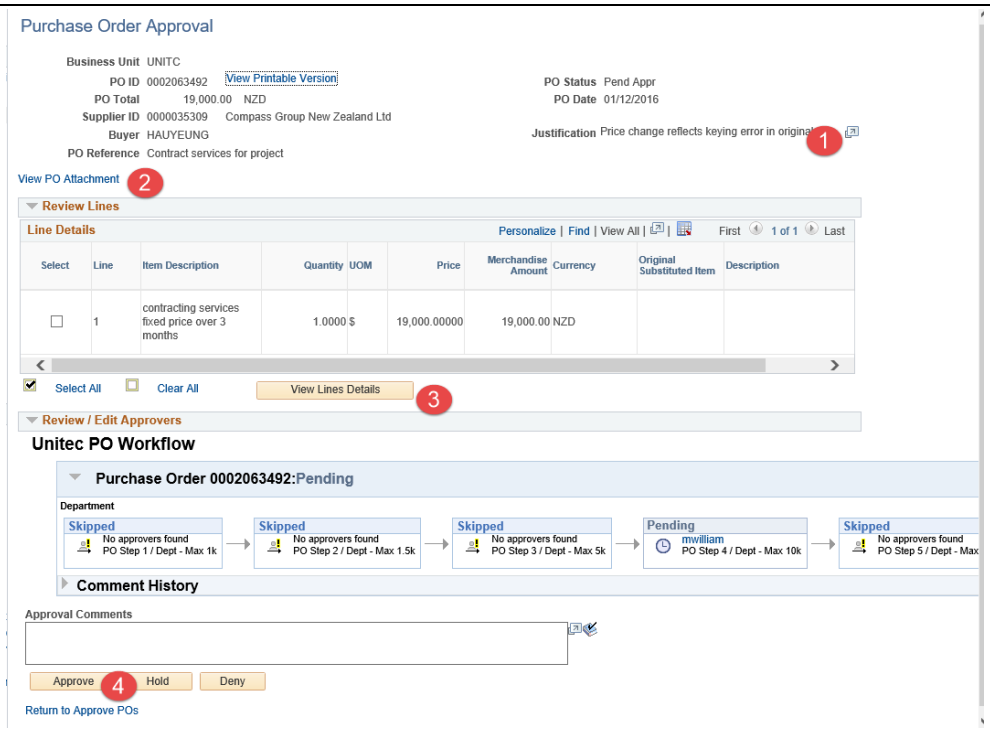
You can access Purchase Orders awaiting your approval from **My Work** in the Buyer Workcenter. This should be your preferred method of checking for and approving PO's

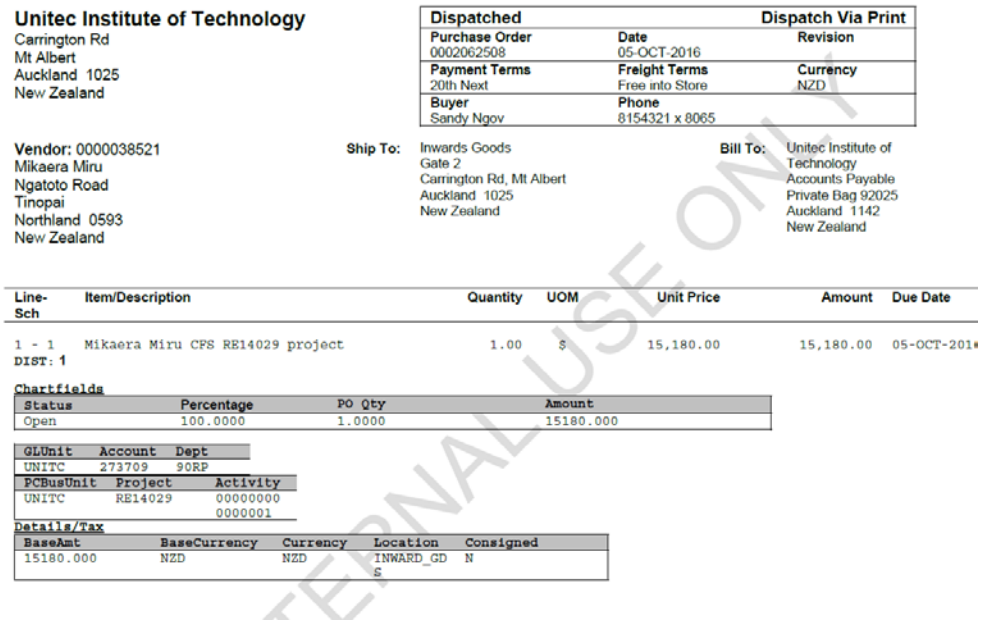
Using My Work

STEP	MY WORK
Path	Purchasing WorkCentre > My Work **My Work** - in the WorkCenter will link you to any areas that need input from you.
Pending Approvals - Purchase Orders indicates how many PO's are needing approval 1. Click on the link	
Although you can see options to approve, hold or deny the PO in this view, **these options are disabled** You need to open and review individual PO's to be able to approve them.	

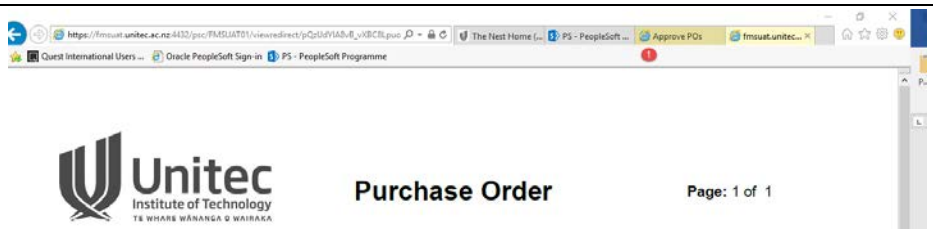
	Disabling Mass Approval functionality is a business decision to ensure the review of each individual PO before approving. This also allows the approver to view PO Justification and any attachments to the Purchase Order.

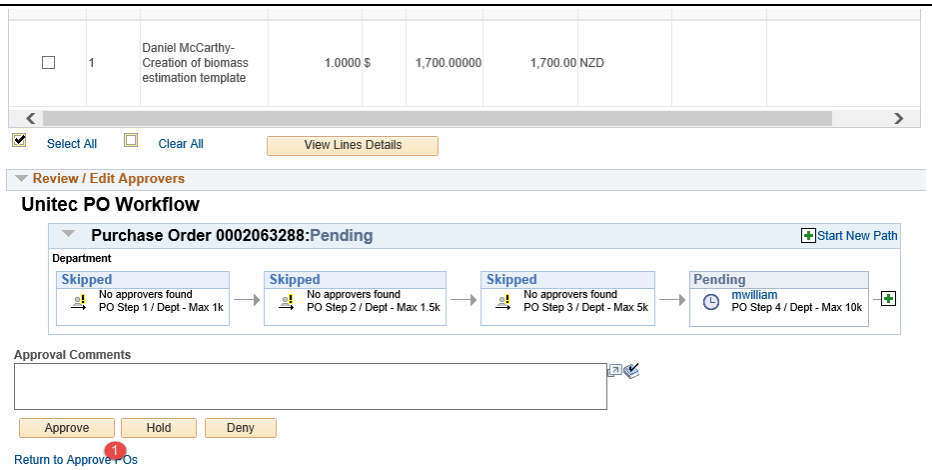
Approving the Purchase Order

STEP	APPROVING
From My Work, click on PO's awaiting approval 1. Click the PO ID	
Review who has already approved, their DFA, and who is still to approve this PO To view further details: Review information 1. Justification for buying 2. View PO attachments 3. View Line Details 4. Action Approval	

STEP	APPROVING
View Line Details When you click on the Button **View Line Details** (3) above Review the Purchase Order opens in a new tab	 **Unitec Institute of Technology** Carrington Rd Mt Albert Auckland 1025 New Zealand **Dispatched** — **Dispatch Via Print** **Purchase Order** 0002062508 — **Date** 05-OCT-2016 — **Revision** **Payment Terms** 20th Next — **Freight Terms** Free into Store — **Currency** NZD **Buyer** Sandy Ngov — **Phone** 8154321 x 8065 **Vendor:** 0000038521 Mikaera Miru Ngatoto Road Tinopai Northland 0593 New Zealand **Ship To:** Inwards Goods, Gate 2, Carrington Rd, Mt Albert, Auckland 1025, New Zealand **Bill To:** Unitec Institute of Technology, Accounts Payable, Private Bag 92025, Auckland 1142, New Zealand Line-Sch: 1 - 1 — Item/Description: Mikaera Miru CFS RE14029 project — Quantity: 1.00 — UOM: $ — Unit Price: 15,180.00 — Amount: 15,180.00 — Due Date: 05-OCT-201 DIST: 1 Chartfields Status: Open — Percentage: 100.0000 — PO Qty: 1.0000 — Amount: 15180.000 GLUnit: UNITC — Account: 273709 — Dept: 90RP PCBusUnit: UNITC — Project: RE14029 — Activity: 00000000 0000001 Details/Tax BaseAmt: 15180.000 — BaseCurrency: NZD — Currency: NZD — Location: INWARD_GDS — Consigned: N INTERNAL USE ONLY

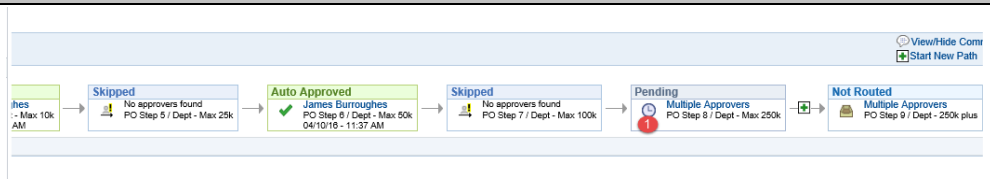
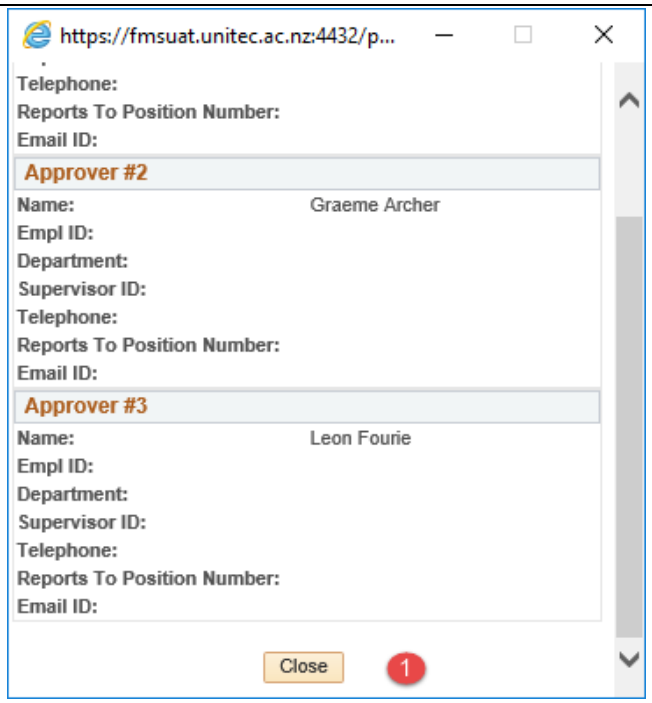
	Points to Review 1. Is there budget for this and have the relevant processes been followed? 2. Is the supplier and description correct and adequate? 3. Are Quantity and UOM correct? 4. Is the total/price correct? 5. Check GL account and department, also project info if appliccable.

The PO opened in a new tab, 1. Click approval tab to return to the approval screen	
	View PO Attachment will also open in a new tab. Close the tab to return to the Approval Screen

1. Click Approve	
	If you are selecting “Hold” or “Deny”, you need to enter approver comments before selecting the appropriate button. – Refer to Page 10 Other Options section below

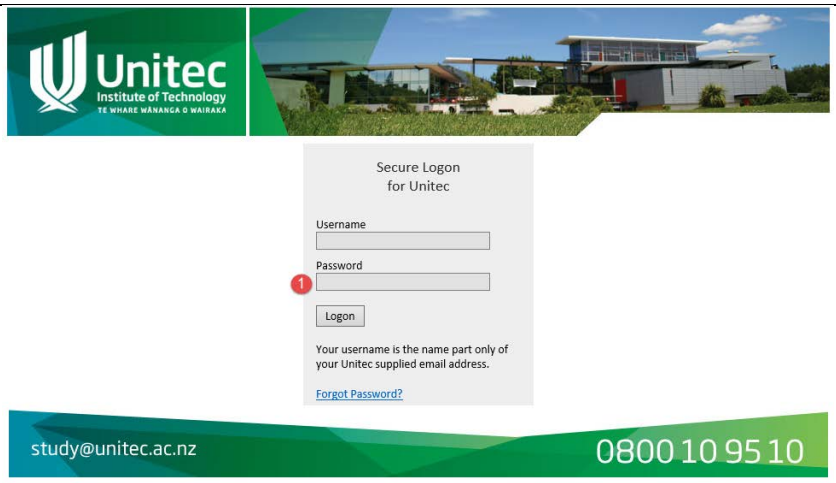
Viewing Multiple Approvers

If a Purchase Order is for a high value, there may be multiple approvers required. You can view these within the PO Approval area

STEP	MULTIPLE APPROVERS
1. Click Multiple Approvers	
A pop-up displays the approvers for this PO at this DFA. 1. Click Close	

Accessing Orders via the Email Notification

You will also receive an email into your mailbox for each PO that you need to approve. However, by using the My Work list, you are not relying on emails.

STEP	EMAIL NOTIFICATION
Email notification is received that a PO requires your approval. 1. Click on the hyperlink in the email to be taken to the approval page	 From: no_reply@unitec.ac.nz [mailto:no_reply@unitec.ac.nz] Sent: Monday, 23 January 2017 9:49 a.m. To: Gerard Queree <gqueree@unitec.ac.nz>; Hamish Martin <hmartin2@unitec.ac.nz> Subject: Approval is Requested for Purchase Order "0002065017" Business Unit "Unitec Institute of Technology" A purchase order has been entered which requires your attention. Business Unit: Unitec Institute of Technology PO ID: 0002065017 PO Reference: Turnitin license renewal PO Date: 2017-01-23 Buyer: SMETZLER You can navigate directly to the approval page by clicking the link below. https://fms.unitec.ac.nz:4432/psp/FMSLIVE/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.PO_APPROVAL_GBL Page=PO_APPROVAL&Action=U&BUSINESS_UNIT=UNITC&PO_ID=0002065017 1
You may need to log into PeopleSoft 1. Enter your Password	
	This will take you directly to the Purchase Order requiring approval. Or Navigate to Purchasing WorkCenter

Other Options

As an approver, you may want more information before approving the Purchase Order, or you may not want to approve the purchase order.

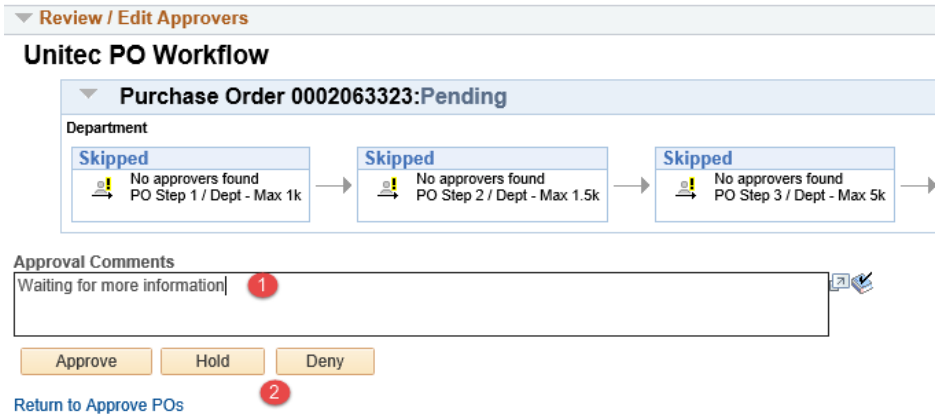
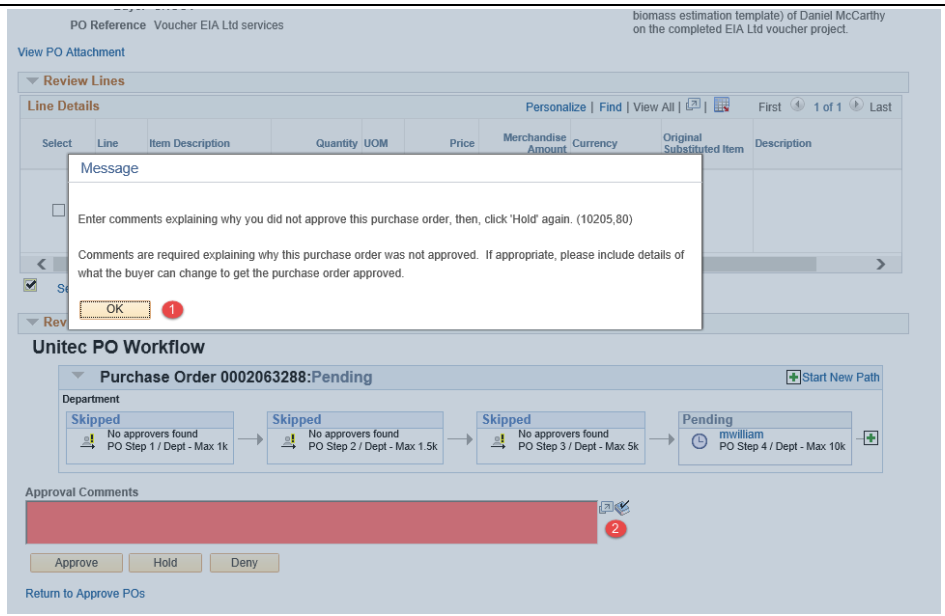
You can go back and approve a PO you placed on “Hold”.

You will not be able to approve a PO you have chosen to “Deny”.

Purchase Order on Hold

If a PO requiring approval is put on hold the approver must enter a reason why

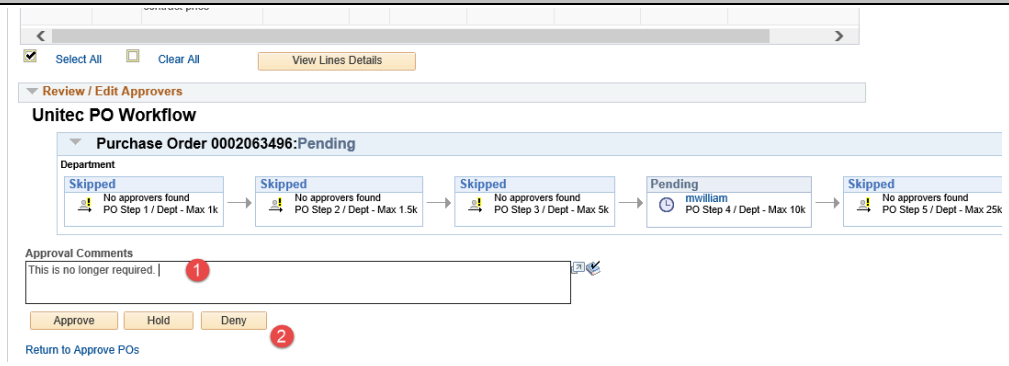
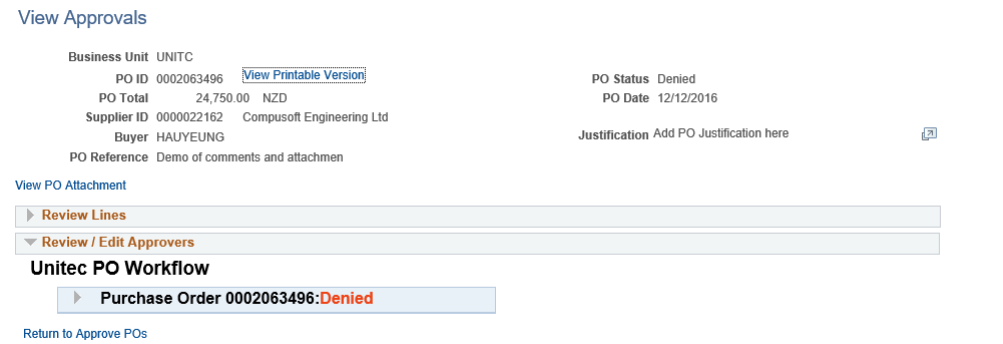
- The buyer receives an e-mail saying the purchase order has been placed on-hold
- The buyer must look at the PO Approval screen to see the reasons why the PO has been placed on-hold, and action accordingly.

STEP	ON HOLD
1. Enter Approver comments- giving a reason for your action 2. Click Hold	
If you don’t enter a comment before clicking Hold or Deny, you are reminded 1. Click OK 2. Enter your comment 3. Click Hold	

PO Denied

When a PO is denied the approver must enter reasons for denial

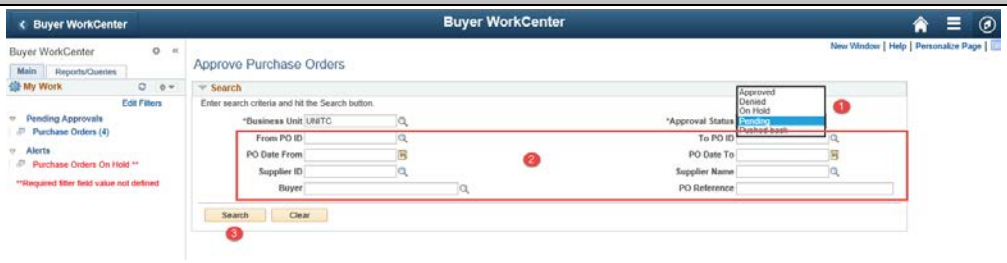
- The buyer receives an e-mail saying the purchase order has been denied
- The buyer must look at the PO Approval screen to see the reasons for the denial.
- The buyer can make the requested changes to the PO and re-launch it for approval.

STEP	DENY
1. Enter Approver comments- giving a reason for your action 2. Click Deny	
Confirmation of the denied PO is displayed.	

	If a PO has been Denied, the buyer will be able to make the requested changes and re-launch the PO for approval.

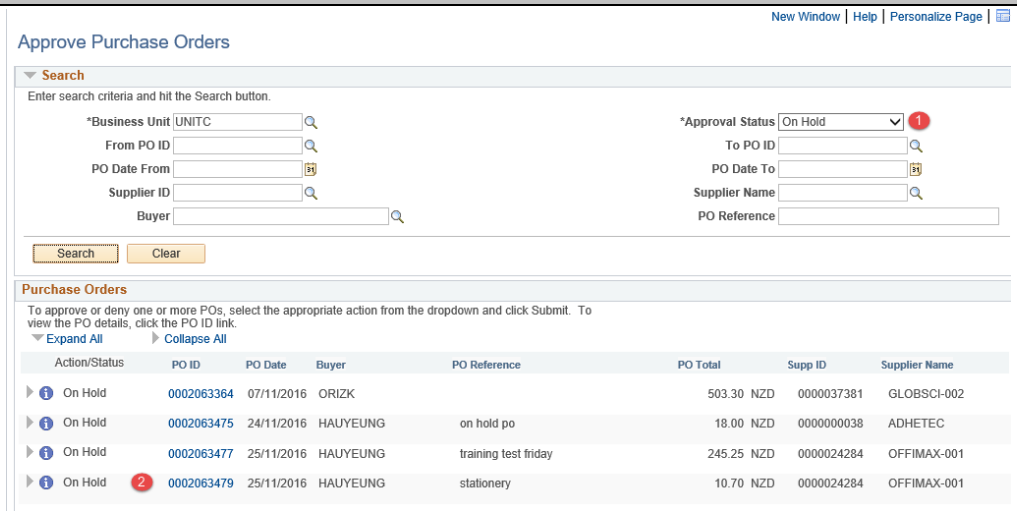
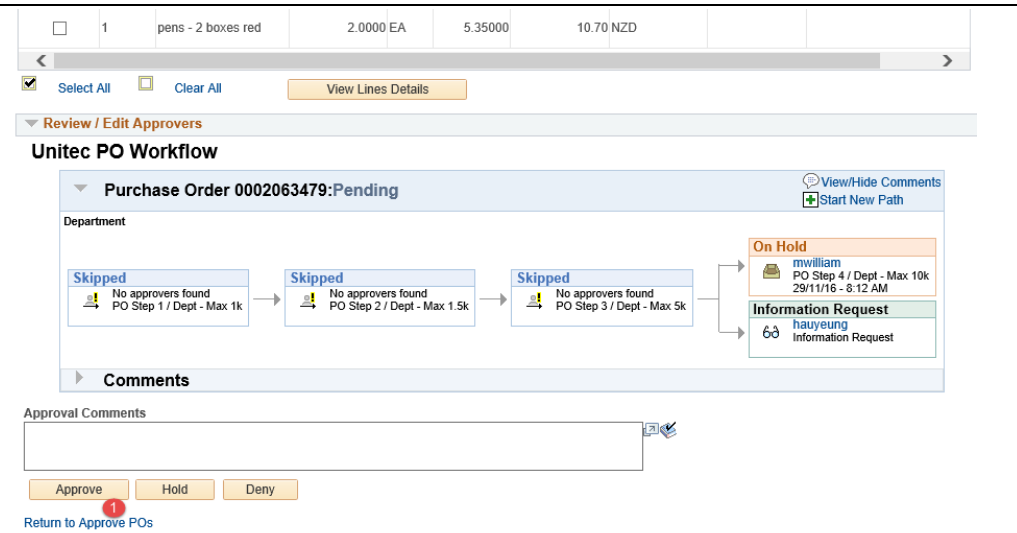
Viewing Purchase Orders with Status other than Pending

As an approver there will be times when you want to view PO's with a status other than Pending.

STEP	VIEW STATUS
In the header section of Approve Purchase Orders, select the status of PO's you wish to view. 1. Select Approval Status 2. Enter other search criteria to reduce the search results eg Supplier, or Buyer 3. Click Search	

	Entering limiting search criteria is particularly important when searching for "approved" orders, as this search can return a very larger number of records which will take a long time to process and tie up system resources.

Approving an On Hold Purchase Order

STEP	APPROVE AN ON HOLD PO
1. Search for Status = On Hold Purchase Orders 2. Click the PO ID	
1. Review and Click Approve