

# PeopleSoft Training Document


## Financials 9.2

### Approve a Purchase Order


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

## Contents

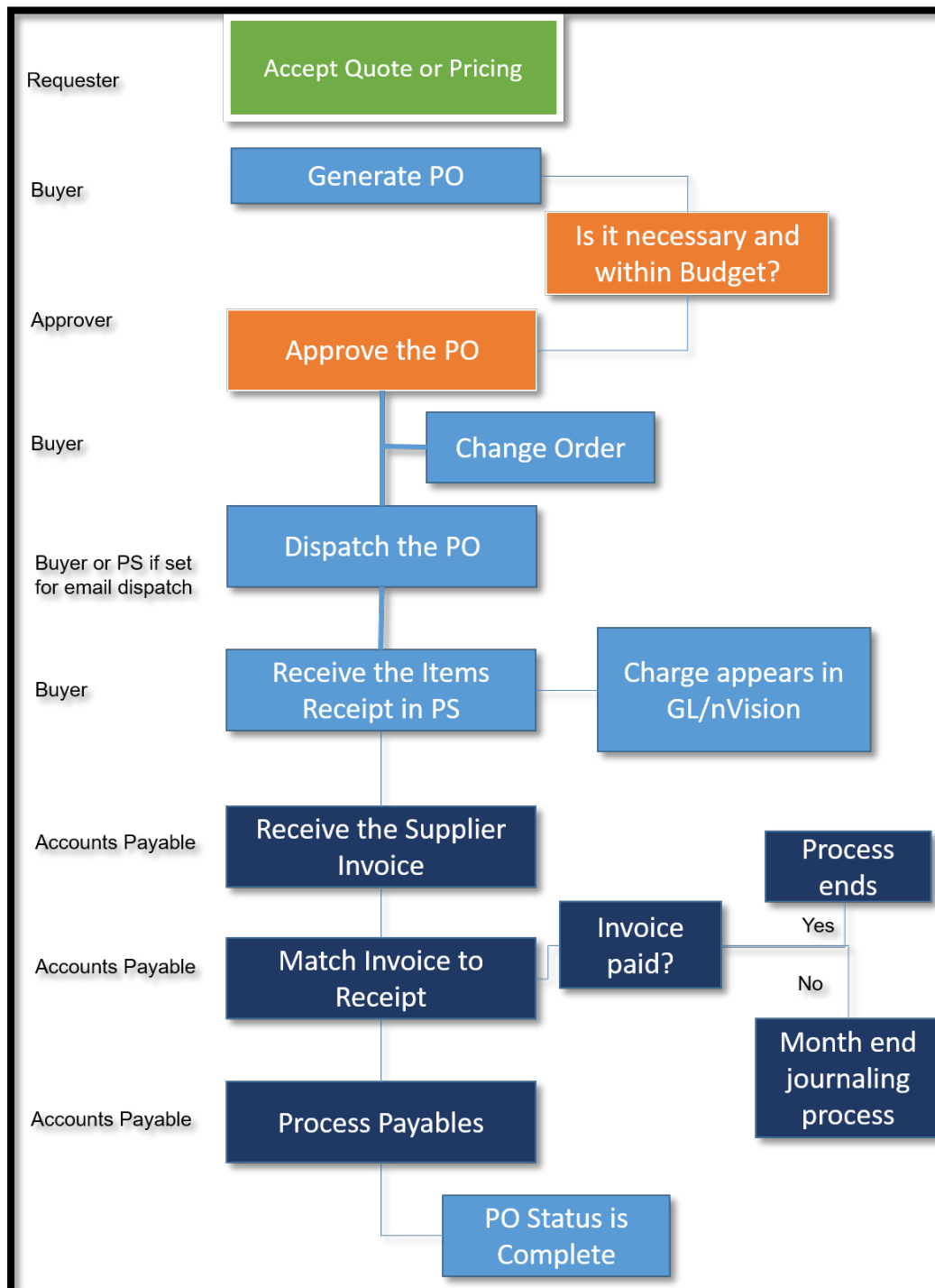
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	<p>By approving a Purchase Order, you confirm that you have reviewed it and that the spend is in line with Unitec Policy and the relevant budgets.</p> <p>It is a commitment to spend.</p>
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## PO Life Cycle

	<p>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.</p> <p>Purchase Orders need to be approved before they are sent to the supplier.</p>
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### 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:

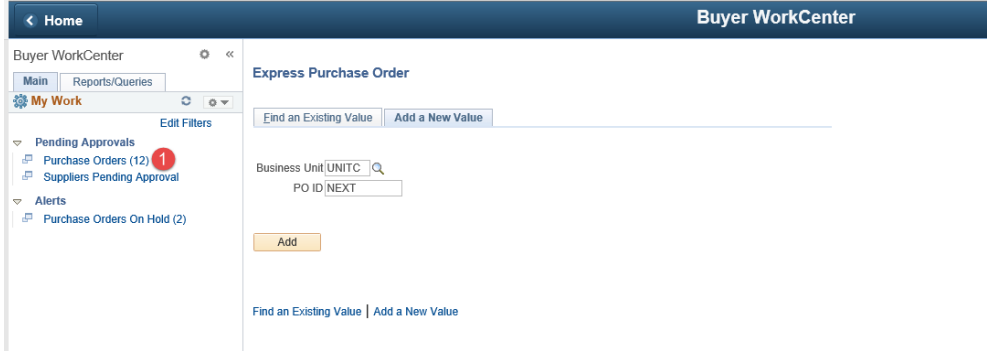
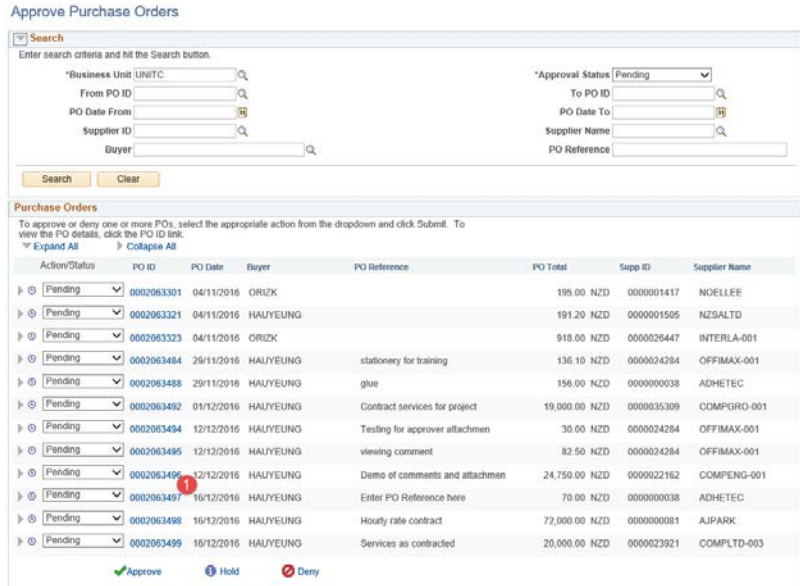
- Approve
- Deny
- On Hold

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  <b>My Work</b> - in the WorkCenter will link you to any areas that need input from you.
<b>Pending Approvals - Purchase Orders</b> 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, <b>these options are disabled</b>  You need to open and review individual PO's to be able to approve them.	

Please note...

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																																																																																																								
<div>From My Work, click on PO's awaiting approval</div> <div>1. Click the PO ID</div>	<div><div>Approve Purchase Orders</div><div><div><div><div>Search</div><div>Enter search criteria and hit the Search button.</div><div><div><div>*Business UnitUNITC</div><div>From PO ID</div><div>PO Date From</div><div>Supplier ID</div><div>Buyer</div></div><div><div>*Approval StatusPending</div><div>To PO ID</div><div>PO Date To</div><div>Supplier Name</div><div>PO Reference</div></div></div></div><div><div>Search</div><div>Clear</div></div></div><div><div>Purchase Orders</div><div>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.</div><div><div>Expand All</div><div>Collapse All</div></div><table><thead><tr><th>Action/Status</th><th>PO ID</th><th>PO Date</th><th>Buyer</th><th>PO Reference</th><th>PO Total</th><th>Supp ID</th><th>Supplier Name</th></tr></thead><tbody><tr><td><div><div></div><div>Pending</div></div></td><td>0002063301</td><td>04/11/2016</td><td>ORIZK</td><td></td><td>195.00 NZD</td><td>0000001417</td><td>NOELLEE</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063321</td><td>04/11/2016</td><td>HAUYEUNG</td><td></td><td>191.20 NZD</td><td>0000001505</td><td>NZSALTD</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063323</td><td>04/11/2016</td><td>ORIZK</td><td></td><td>918.00 NZD</td><td>0000026447</td><td>INTERLA-001</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063484</td><td>29/11/2016</td><td>HAUYEUNG</td><td>stationery for training</td><td>136.10 NZD</td><td>0000024284</td><td>OFFIMAX-001</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063488</td><td>29/11/2016</td><td>HAUYEUNG</td><td>glue</td><td>156.00 NZD</td><td>0000000038</td><td>ADHETEC</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063492</td><td>01/12/2016</td><td>HAUYEUNG</td><td>Contract services for project</td><td>19,000.00 NZD</td><td>0000035309</td><td>COMPGRO-001</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063494</td><td>12/12/2016</td><td>HAUYEUNG</td><td>Testing for approver attachmen</td><td>30.00 NZD</td><td>0000024284</td><td>OFFIMAX-001</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063495</td><td>12/12/2016</td><td>HAUYEUNG</td><td>viewing comment</td><td>82.50 NZD</td><td>0000024284</td><td>OFFIMAX-001</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063496</td><td>12/12/2016</td><td>HAUYEUNG</td><td>Demo of comments and attachmen</td><td>24,750.00 NZD</td><td>0000022162</td><td>COMPENG-001</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063497</td><td>16/12/2016</td><td>HAUYEUNG</td><td>Enter PO Reference here</td><td>70.00 NZD</td><td>0000000038</td><td>ADHETEC</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063498</td><td>16/12/2016</td><td>HAUYEUNG</td><td>Hourly rate contract</td><td>72,000.00 NZD</td><td>0000000081</td><td>AJPARK</td></tr><tr><td><div><div></div><div>Pending</div></div></td><td>0002063499</td><td>16/12/2016</td><td>HAUYEUNG</td><td>Services as contracted</td><td>20,000.00 NZD</td><td>0000023921</td><td>COMPLTD-003</td></tr></tbody></table><div><div>Approve</div><div>Hold</div><div>Deny</div></div></div></div></div>	Action/Status	PO ID	PO Date	Buyer	PO Reference	PO Total	Supp ID	Supplier Name	<div><div></div><div>Pending</div></div>	0002063301	04/11/2016	ORIZK		195.00 NZD	0000001417	NOELLEE	<div><div></div><div>Pending</div></div>	0002063321	04/11/2016	HAUYEUNG		191.20 NZD	0000001505	NZSALTD	<div><div></div><div>Pending</div></div>	0002063323	04/11/2016	ORIZK		918.00 NZD	0000026447	INTERLA-001	<div><div></div><div>Pending</div></div>	0002063484	29/11/2016	HAUYEUNG	stationery for training	136.10 NZD	0000024284	OFFIMAX-001	<div><div></div><div>Pending</div></div>	0002063488	29/11/2016	HAUYEUNG	glue	156.00 NZD	0000000038	ADHETEC	<div><div></div><div>Pending</div></div>	0002063492	01/12/2016	HAUYEUNG	Contract services for project	19,000.00 NZD	0000035309	COMPGRO-001	<div><div></div><div>Pending</div></div>	0002063494	12/12/2016	HAUYEUNG	Testing for approver attachmen	30.00 NZD	0000024284	OFFIMAX-001	<div><div></div><div>Pending</div></div>	0002063495	12/12/2016	HAUYEUNG	viewing comment	82.50 NZD	0000024284	OFFIMAX-001	<div><div></div><div>Pending</div></div>	0002063496	12/12/2016	HAUYEUNG	Demo of comments and attachmen	24,750.00 NZD	0000022162	COMPENG-001	<div><div></div><div>Pending</div></div>	0002063497	16/12/2016	HAUYEUNG	Enter PO Reference here	70.00 NZD	0000000038	ADHETEC	<div><div></div><div>Pending</div></div>	0002063498	16/12/2016	HAUYEUNG	Hourly rate contract	72,000.00 NZD	0000000081	AJPARK	<div><div></div><div>Pending</div></div>	0002063499	16/12/2016	HAUYEUNG	Services as contracted	20,000.00 NZD	0000023921	COMPLTD-003
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<div>Review who has already approved, their DFA, and who is still to approve this PO</div> <div>To view further details:</div> <div>Review information</div> <div><div>1. Justification for buying</div><div>2. View PO attachments</div><div>3. View Line Details</div><div>4. Action Approval</div></div>	<div><div>Purchase Order Approval</div><div><div><div>Business UnitUNITC</div><div>PO ID0002063492</div><div>PO Total19,000.00 NZD</div><div>Supplier ID0000035309</div><div>BuyerHAUYEUNG</div><div>PO ReferenceContract services for project</div></div><div><div>View Printable Version</div><div>PO StatusPend Appr</div><div>PO Date01/12/2016</div><div>JustificationPrice change reflects keying error in original</div></div></div><div><div>View PO Attachment</div><div><div>Review Lines</div><div><div>Line Details</div><div><div>PersonalizeFindView All</div><div>First1 of 1Last</div></div><table><thead><tr><th>Select</th><th>Line</th><th>Item Description</th><th>Quantity</th><th>UOM</th><th>Price</th><th>Merchandise Amount</th><th>Currency</th><th>Original Substituted Item</th><th>Description</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td>1</td><td>contracting services fixed price over 3 months</td><td>1.0000</td><td>\$</td><td>19,000.00000</td><td>19,000.00</td><td>NZD</td><td></td><td></td></tr></tbody></table><div><div>Select All</div><div>Clear All</div><div>View Lines Details</div></div></div><div><div>Review / Edit Approvers</div><div><div>Unitec PO Workflow</div><div><div>Purchase Order 0002063492:Pending</div><div><div>Department</div><div><div>SkippedNo approvers found PO Step 1 / Dept - Max 1k</div><div>SkippedNo approvers found PO Step 2 / Dept - Max 1.5k</div><div>SkippedNo approvers found PO Step 3 / Dept - Max 5k</div><div>Pendingmwilliam PO Step 4 / Dept - Max 10k</div><div>SkippedNo approvers found PO Step 5 / Dept - Max</div></div><div>Comment History</div><div><div>Approval Comments</div><div><div>Approve</div><div>Hold</div><div>Deny</div></div></div></div><div>Return to Approve POs</div></div></div></div></div></div></div>	Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency	Original Substituted Item	Description	<input type="checkbox"/>	1	contracting services fixed price over 3 months	1.0000	\$	19,000.00000	19,000.00	NZD																																																																																						
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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

Vendor: 0000038521

Mikaera Miru  
Ngatoto Road  
Tinopai  
Northland 0593  
New Zealand

Dispatched

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


Ship To:

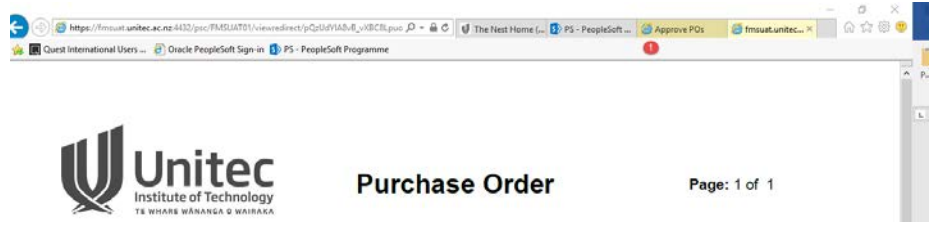
Inwards Goods  
Gate 2  
Carrington Rd, Mt Albert  
Auckland 1025  
New Zealand

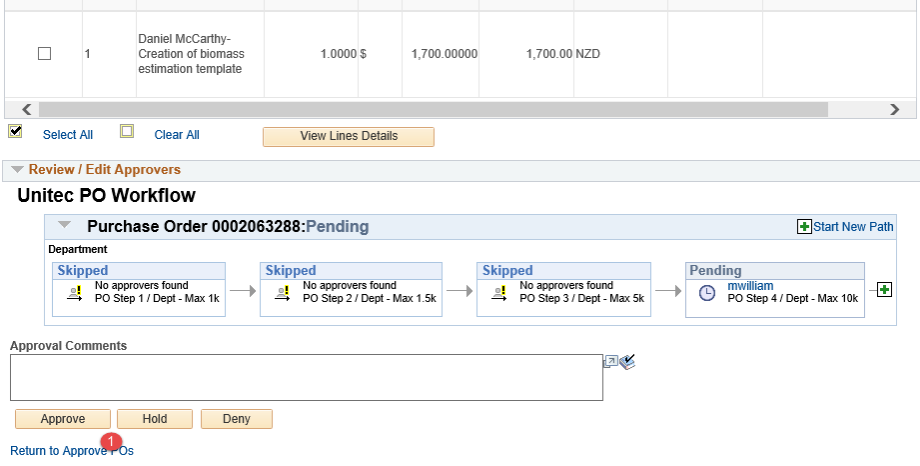
Bill To:

Unitec Institute of Technology  
Accounts Payable  
Private Bag 92025  
Auckland 1142  
New Zealand

Line-Sch	Item/Description	Quantity	UOM	Unit Price	Amount	Due Date
1 - 1	Mikaera Miru CFS RE14029 project	1.00	\$	15,180.00	15,180.00	05-OCT-2016
DIST: 1						
Chartfields						
Status	Percentage	PO Qty	Amount			
Open	100.0000	1.0000	15180.000			
GLUnit Account Dept						
UNITC	273709	90RP				
PCBusUnit Project Activity						
UNITC	RE14029	00000000				
		00000001				
Details/Tax						
BaseAmt	BaseCurrency	Currency	Location	Consigned		
15180.000	NZD	NZD	INWARD_GD	N		
			\$			

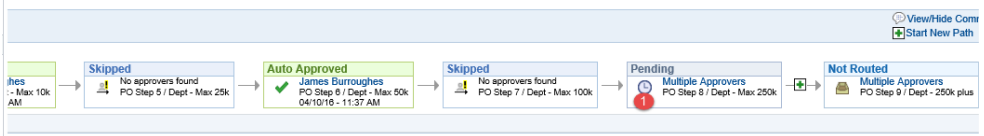
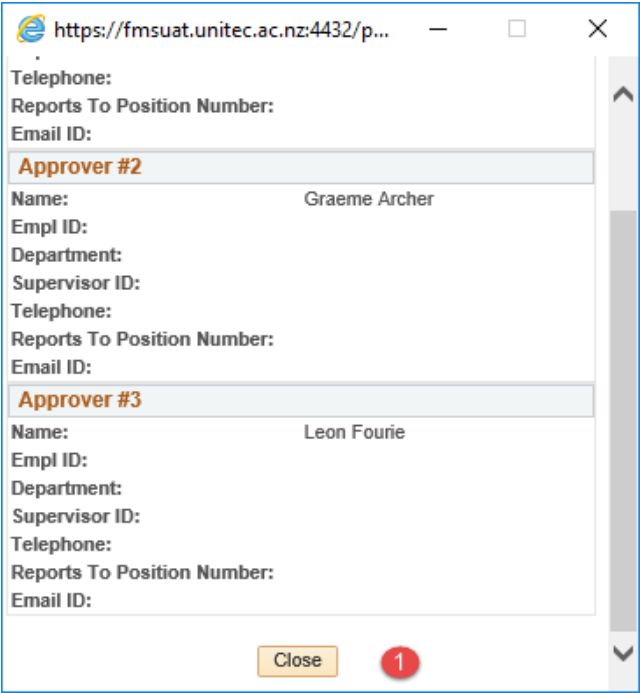
	<p><b>Points to Review</b></p> <ol style="list-style-type: none"> <li>1. Is there budget for this and have the relevant processes been followed?</li> <li>2. Is the supplier and description correct and adequate?</li> <li>3. Are Quantity and UOM correct?</li> <li>4. Is the total/price correct?</li> <li>5. Check GL account and department, also project info if applicable.</li> </ol>
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<p>The PO opened in a new tab,</p> <ol style="list-style-type: none"> <li>1. Click approval tab to return to the approval screen</li> </ol>	
	<p>View PO Attachment will also open in a new tab. Close the tab to return to the Approval Screen</p>

1. Click Approve	
	<p>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</p>

## 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	
<p>A pop-up displays the approvers for this PO at this DFA.</p> <p>1. Click Close</p>	



## 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
<p>Email notification is received that a PO requires your approval.</p> <ol style="list-style-type: none"> <li>Click on the hyperlink in the email to be taken to the approval page</li> </ol>	<p>From: no_reply@unitec.ac.nz [mailto:no_reply@unitec.ac.nz]          Sent: Monday, 23 January 2017 9:49 a.m.          To: Gerard Queree &lt;gqueree@unitec.ac.nz&gt;; Hamish Martin &lt;hmartin2@unitec.ac.nz&gt;          Subject: Approval is Requested for Purchase Order "0002065017" Business Unit "Unitec Institute of Technology"</p> <p>A purchase order has been entered which requires your attention.</p> <p>Business Unit: Unitec Institute of Technology          PO ID: 0002065017          PO Reference: Turnitin license renewal          PO Date: 2017-01-23          Buyer: SMETZLER</p> <p>You can navigate directly to the approval page by clicking the link below.</p> <p><a href="https://fms.unitec.ac.nz:4432/psp/FMS/UYE/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS_PO_APPROVAL.GBL?Page=PO_APPROVAL&amp;Action=U&amp;BUSINESS_UNIT=UNITEC&amp;PO_ID=0002065017">https://fms.unitec.ac.nz:4432/psp/FMS/UYE/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS_PO_APPROVAL.GBL?Page=PO_APPROVAL&amp;Action=U&amp;BUSINESS_UNIT=UNITEC&amp;PO_ID=0002065017</a></p> 
<p>You may need to log into PeopleSoft</p> <ol style="list-style-type: none"> <li>Enter your Password</li> </ol>	 <div data-bbox="742 1048 973 1310"> <p>Secure Logon for Unitec</p> <p>Username <input type="text"/></p> <p>Password <input type="password"/></p> <p> Logon</p> <p>Your username is the name part only of your Unitec supplied email address.</p> <p><a href="#">Forgot Password?</a></p> </div> <div data-bbox="443 1317 1273 1391"> <p>study@unitec.ac.nz 0800 10 95 10</p> </div>
	<p>This will take you directly to the Purchase Order requiring approval.</p> <p>Or</p> <p>Navigate to Purchasing WorkCenter</p>

## 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

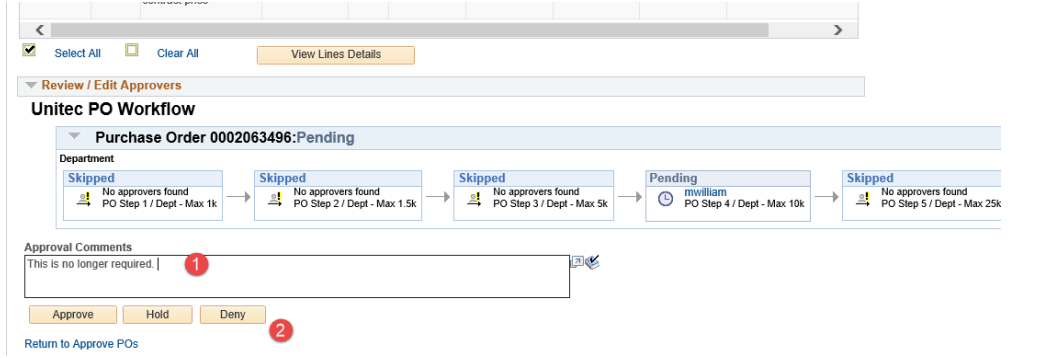
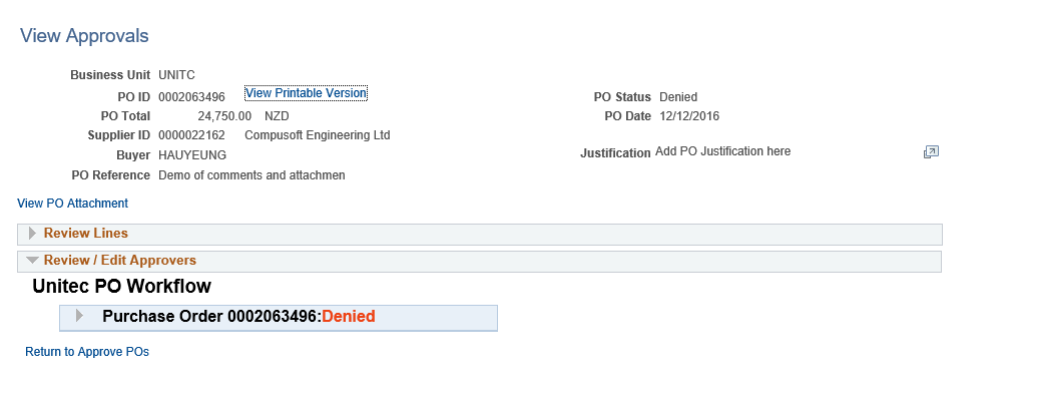

- The buyer receives an e-mail saying the purchase order has been placed on-hold
- The buyer must look at the PO Approval screen to see the reasons why the PO has been placed on-hold, and action accordingly.

STEP	ON HOLD
<ol style="list-style-type: none"><li>1. Enter Approver comments- giving a reason for your action</li><li>2. Click Hold</li></ol>	<div><div>Review / Edit Approvers</div><div>Unitec PO Workflow</div><div>Purchase Order 0002063323:Pending</div><div>Department</div><div><div>Skipped</div><div>No approvers found PO Step 1 / Dept - Max 1k</div></div><div>→</div><div><div>Skipped</div><div>No approvers found PO Step 2 / Dept - Max 1.5k</div></div><div>→</div><div><div>Skipped</div><div>No approvers found PO Step 3 / Dept - Max 5k</div></div><div>→</div></div> <div>Approval Comments</div> <div>Waiting for more information  1</div> <div>Approve Hold Deny</div> <div>Return to Approve POs 2</div>

## 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
<p>1. Enter Approver comments- giving a reason for your action</p> <p>2. Click Deny</p>	
<p>Confirmation of the denied PO is displayed.</p>	
	<p>If a PO has been Denied, the buyer will be able to make the requested changes and re-launch the PO for approval.</p>

## 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
<p>In the header section of Approve Purchase Orders, select the status of PO's you wish to view.</p> <ol style="list-style-type: none"> <li>1. Select Approval Status</li> <li>2. Enter other search criteria to reduce the search results eg Supplier, or Buyer</li> <li>3. Click</li> </ol> <div data-bbox="253 1106 400 1149">Search</div>	

 <p>Please note...</p>	<p>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.</p>
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