Placing a PO on Approval Hold

Core-

An approver has the option to put a PO on approval **Hold**. Hold can be used if more time is needed to research an issue before making a final decision on approval. The hold action prevents the approval process from going to the next approval step. The buyer receives an email notification and the PO is available for review in their worklist.

The approval 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.

Putting a PO on Hold:

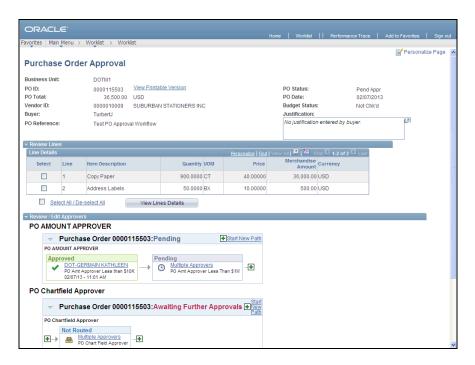
- Marks the PO as Hold preventing it from processing further in workflow. It remains on Hold until the approver approves or denies.
- Removes it from the worklists of other approvers when there are multiple approvers at an approval level.
- Puts a PO link into the buyer's Worklist.
- Creates an audit trail that can be seen in **Approvals History**.

Procedure

Navigation: Worklist

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rom	Date From	Work Item	Worked By Activity	Priority	Link	
00T-Bacote Tracey	12/19/2012	Approval Routing	Approval Workflow	2-Medium	Requisition. 1620121. STATE. 1907- 01-01.N.Q. BUSINESS UNIT.DOTM1 REQ. ID:0000074569	ark Worked Reassig
OT-Bacote Tracey	01/15/2013	Approval Routing	Approval Workflow	2-Medium	Requisition. 1620681. STATE, 1907- 01-01, N. 0, BUSINESS UNIT.DOTM1 REQ. ID:0000074604	ark Worked Reassig
OT-TURBERT ulie	01/30/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1011, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115483	ark Worked Reassig
OT-TURBERT ulie	01/30/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1031, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115484	ark Worked Reassig
OT-TURBERT	01/30/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1052, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115485	ark Worked Reassig
OT-TURBERT ulie	01/30/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1061, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115399	ark Worked Reassig
OT-TURBERT ulie	01/31/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1071, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115486	ark Worked Reassig
OT-GERMAIN	02/07/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder. 1231. STATE, 1903- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO.ID:0000115490	ark-Worked Reassig
OT-TURBERT ulie	02/07/2013	Approval Routing	Approval Workflow	2-Medium	PO ID:0000115503	ark Worked Reassig
OT-TURBERT	02/07/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 1251, STATE, 1903- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115446	ark Worked Reassig

Step	Action
1.	Click the PurchaseOrder, 1241, STATE, 1903-01-01, N, 0, BUSINESS_UNIT:DOTM1 link. PurchaseOrder, 1241, STATE, 1903- 01-01, N, 0, BUSINESS_UNIT:DOTM1 PO_ID:0000115503



Step	Action
2.	The Purchase Order Approval page displays.
3.	Click the scrollbar.

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Select	Line	Item Description	Quantity UOM	Price	Merchandise Amount	Currency		
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	2	Address Labels	50.0000 BX	10.00000	500.00	USD		
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~	Purcha	ise Order 0000115503:Pe	ending	Start New Path				
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Step	Action
4.	Comments are required when putting a PO on hold.
	Enter Holding until next month into the Approval Comments field.
5.	Click the Hold button.

urchase	Orde	er Approval					📝 Persona	lize Page
usiness Unit: O ID: O Total: endor ID: uyer: O Reference:		36,500.00 US	BURBAN STATIONERS INC			PO Status: PO Date: Budget Status: Justification: No justification entered I	Pend Appr 02/07/2013 Not ChK'd by buyer.	7
Review Lines								
Line Details				Personalize Find	View All 1	First K 1-2 of 2 Last		
Select	Line	Item Description	Quantity UOM	Price		lise ount Currency	1	
	1	Copy Paper	900.0000 CT	40.00000		0.00 USD		
	2	Address Labels	50.0000 BX	10.00000	500	0.00 USD		
Review / Edit .	Approver	s	Lines Details					
			Awaiting Further Appr	ovals	ide Comments ew Path			

Step	Action
6.	The PO Amount Approval path shows the On Hold status for this approval step and that Comments were entered.
	The workflow shows an Information Request notification has been sent to the buyer.
7.	Click the Worklist link.

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Worklist					Personalize Find	/iew All 📴 🛗 First 🛙	1-10 of 10 🚺
From	Date From	Work Item	Worked By Activity	Priority	Link		
DOT-Bacote Tracey	12/19/2012	Approval Routing	Approval Workflow	2-Medium 💌	Requisition, 1620121, STATE, 1907- 01-01, N. 0, BUSINESS UNIT:DOTM1 REQ ID:0000074569	Mark Worked	Reassign
DOT-Bacote Tracey	01/15/2013	Approval Routing	Approval Workflow	2-Medium 💙	Requisition, 1620681, STATE, 1907- 01-01, N, 0, BUSINESS UNIT:DOTM1 REQ. ID:0000074604	Mark-Worked	Reassign
DOT-TURBERT Julie	01/30/2013	Approval Routing	Approval Workflow	2-Medium 🔽	PurchaseOrder, 1011, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115483	Mark-Worked	Reassign
DOT-TURBERT Julie	01/30/2013	Approval Routing	Approval Workflow	2-Medium 🗸	PurchaseOrder, 1031, STATE, 1901-	Mark Worked	Reassign
DOT-TURBERT Julie	01/30/2013	Approval Routing	Approval Workflow	2-Medium 🔽	PurchaseOrder, 1052, STATE, 1901- 01-01, N. 0. BUSINESS UNIT:DOTM1 PO ID:0000115485	Mark Worked	Reassign
DOT-TURBERT Julie	01/30/2013	Approval Routing	Approval Workflow	2-Medium 🔽	PurchaseOrder, 1061, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115399	Mark Worked	Reassign
DOT-TURBERT Julie	01/31/2013	Approval Routing	Approval Workflow	2-Medium 💌	PurchaseOrder, 1071, STATE, 1901-	Mark Worked	Reassign
DOT-GERMAIN KATHLEEN	02/07/2013	Approval Routing	Approval Workflow	2-Medium 💙	PurchaseOrder, 1231, STATE, 1903- 01-01, N. 0. BUSINESS UNIT:DOTM1 PO ID:0000115490	Mark-Worked	Reassign
DOT-TURBERT Julie	02/07/2013	Approval Routing	Approval Workflow	2-Medium 🔽	PurchaseOrder, 1241, STATE, 1903- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115503	Mark-Worked	Reassign
DOT-TURBERT Julie	02/07/2013	Approval Routing	Approval Workflow	2-Medium 💌	PurchaseOrder, 1251, STATE, 1903-	Mark Worked	Reassign

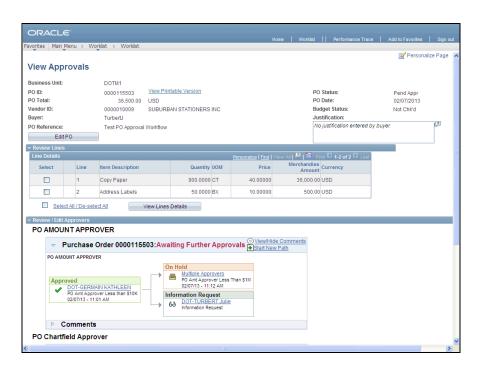
Step	Action
8.	The PO remains on the approver's worklist pending their action or a change is made to the PO that restarts the approval process.



Step	Action
9.	The buyer receives a notification email with a link to access the approvals page for this item.

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rom	Date From	Work Item	Worked By Activity	Priority	Link		
OT-Colonese ugene	02/07/2013	Approval Request Information	Approval Workflow	2-Medium 💊	PurchaseOrder, 1241, STATE, 1903- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115503	Mark Worked	Reassig
OT-GERMAIN ATHLEEN	02/07/2013	Approval Request Information	Approval Workflow	2-Medium 💊	PurchaseOrder, 1231, STATE, 1903- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115490	Mark Worked	Reassig
OT-Colonese ugene	02/06/2013	Approval Request Information	Approval Workflow	2-Medium 💌	PurchaseOrder, 1141, STATE, 1903- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115500	Mark Worked	Reassig
OT-GERMAIN ATHLEEN	02/06/2013	Approval Request Information	Approval Workflow	2-Medium 💊	PurchaseOrder, 1191, STATE, 1903- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115501	Mark Worked	Reassig
OT-GERMAIN ATHLEEN	02/06/2013	Transaction Denied	Approval Workflow	2-Medium 💊	PurchaseOrder, 981, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115480	Mark Worked	Reassig
OT-Torcia Mario	01/30/2013	Approval Request Information	Approval Workflow	2-Medium 💌	PurchaseOrder, 891, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115459	Mark Worked	Reassig
OT-Torcia Mario	01/29/2013	Transaction Approved	Approval Workflow	2-Medium 💊	PurchaseOrder, 971, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115461	Mark Worked	Reassig
OT-Torcia Mario	01/28/2013	Transaction Approved	Approval Workflow	2-Medium 💌	PurchaseOrder, 961, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115396	Mark Worked	Reassig
OT-Torcia Mario	01/18/2013	Transaction Approved	Approval Workflow	2-Medium 💌	PurchaseOrder, 871, STATE, 1901- 01-01, N. 0, BUSINESS_UNIT:DOTM1 PO_ID:0000115465	Mark Worked	Reassig
OT-Torcia Mario	01/18/2013	Transaction Approved	Approval Workflow	2-Medium 💊	PurchaseOrder, 842, STATE, 1901- 01-01, N. 0, BUSINESS UNIT:DOTM1 PO ID:0000115464	Mark Worked	Reassig

Step	Action
10.	The buyer clicks the PurchaseOrder , 1241 , STATE , 1903-01-01 , N , 0 , BUSINESS_UNIT:DOTM1 link to review the approval. PurchaseOrder, 1241 , STATE , 1903 - 01-01, N, 0, BUSINESS_UNIT:DOTM1



Step	Action
11.	Click the View/Hide Comments link to review the approver's comments.
12.	Click the scrollbar.

ORACLE	Worklist Performance Trace	Add to Favorites Sign out
Favorites Main Menu > Worklist > Worklist		
✓ Review / Edit Approvers		· · · · · · · · · · · · · · · · · · ·
PO AMOUNT APPROVER		
Purchase Order 0000115503:Awaiting Further Approvals Start New Path	nts	
PO AMOUNT APPROVER		
Approved DOT-GERMAIN KATHLEEN PO Amt Approver Less than \$10K 02/07/13 - 11:01 AM O Amt Approver Less than \$10K 02/07/13 - 11:01 AM O DOT-TURBERT Julie 60 Information Request		
Comments DOT-Colonese Eugene at 02/07/13 - 11:12 AM Holding until next month PO Chartfield Approver Purchase Order 0000115503:Awaiting Further Approvals ViewHide Con Histan New Path	nts	
P0 Chartfield Approver		
Not Routed		
▶ Comments		
Approval Comments		
Save Comments		
Return to Worklist		
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Step	Action			
13.	The there is no action required from the buyer.			
	(While not required) Enter Aware of this hold into the Approval Comments field.			
14.	Click the Save Comments button.			
	Save Comments			

ORACLE				Home Worklis		Add to Favorites	Sign out
Favorites Main Menu > Work	list > Worklist						
View Approvals							^
Business Unit: PO ID: PO Total: Vendor ID: Buyer: PO Reference: Edit PO	36,500.00 USD	Itable Version			PO Status: PO Date: Budget Status: Justification: No justification entered by	Pend Appr 02/07/2013 Not ChKd buyer.	2
🔻 Review Lines							
Line Details			Personalize Find		First K 1-2 of 2 Last		
Select Line	Item Description	Quantity UOM	Price	Merchand	unt Currency		
1	Copy Paper	900.0000 CT	40.00000	36,000	.00 USD		
2	Address Labels	50.0000 BX	10.00000	500	.00 USD		
Select All / De-selec	t All View Lines	Details					
- Review / Edit Approvers							
PO AMOUNT APPRO	VER						
	order 0000115503:Awa	iting Eurther Appr	Wale Diew/Hi	de Comments			
		ang ranner Appre	+ Start Ne	w Path			
02/07/13 - 11:0	N KATHLEEN er Less than \$10K	n Hold Multiple Approvers PO Ant Approver Less 20/07/13 - 11:12 AM formation Request bot-TURBERT Julie information Request					
Aware of this I		07 F 101					
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Step	Action
15.	The comment has been inserted above the approver's original comment.
16.	End of Procedure.