

Placing a PO on Approval Hold



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:

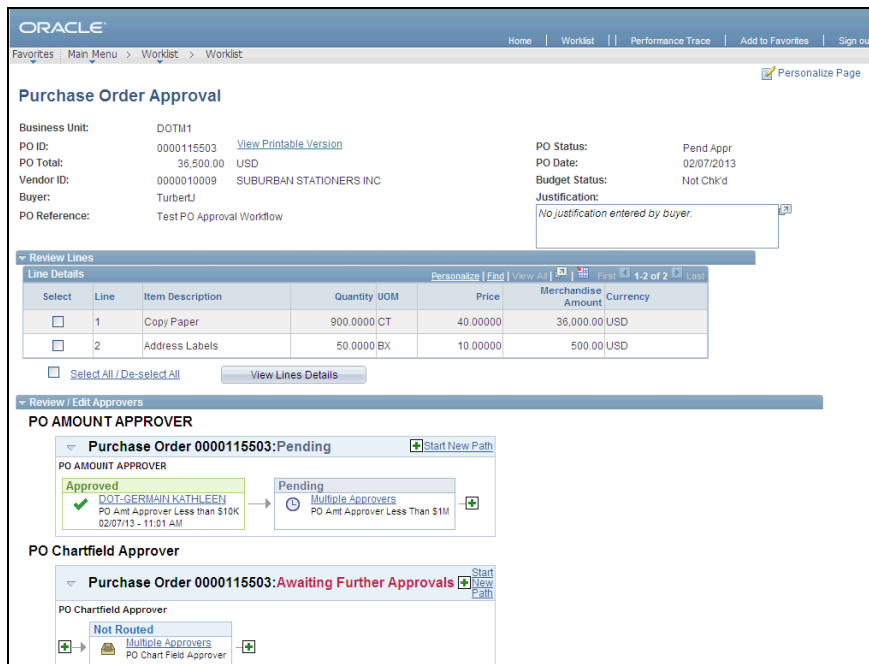
- Marks the PO as Hold preventing it from processing further in workflow. It remains on Hold until the approver approves or denies.
- Removes it from the worklists of other approvers when there are multiple approvers at an approval level.
- Puts a PO link into the buyer's Worklist.
- Creates an audit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

Procedure

Navigation: Worklist

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, PO 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, PO ID: 0000074504	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: 0000114483	Mark Worked	Reassign
DOT-TURBERT Julie	01/30/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder: 1031, STATE: 1901-01-01, N: 0, BUSINESS UNIT: DOTM1, PO ID: 0000114484	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: 0000114485	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: 0000114486	Mark Worked	Reassign
DOT-TURBERT Julie	01/31/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder: 1071, STATE: 1901-01-01, N: 0, BUSINESS UNIT: DOTM1, PO ID: 0000114486	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: 0000114499	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: 0000114504	Mark Worked	Reassign
DOT-TURBERT Julie	02/07/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder: 1251, STATE: 1903-01-01, N: 0, BUSINESS UNIT: DOTM1, PO ID: 0000114446	Mark Worked	Reassign

Step	Action
1.	Click the PurchaseOrder, 1241, STATE, 1903-01-01, N, 0, BUSINESS_UNIT:DOTM1 link. <div style="border: 1px solid black; padding: 2px; margin-top: 5px;"> PurchaseOrder, 1241, STATE, 1903-01-01, N, 0, BUSINESS_UNIT:DOTM1 PO ID:0000115503 </div>



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

Review Lines

Select	Line	Item Description	Quantity UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	Copy Paper	900.0000 CT	40.00000	36,000.00	USD
<input type="checkbox"/>	2	Address Labels	50.0000 BX	10.00000	500.00	USD

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000115503: Pending

Approved: DOT-GERMAIN KATHLEEN (PO Amt Approver Less than \$10K, 02/07/13 - 11:01 AM)

Pending: Multiple Approvers (PO Amt Approver Less Than \$1M)

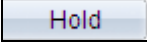
PO Chartfield Approver

Purchase Order 0000115503: Awaiting Further Approvals

Not Routed: Multiple Approvers (PO Chart Field Approver)

Approval Comments: [Empty text box]

Buttons: Approve, Hold, Deny, Pushback

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. 

Purchase Order Approval

Business Unit: DOTM1
 PO ID: 0000115503
 PO Total: 36,500.00 USD
 Vendor ID: 0000010009 SUBURBAN STATIONERS INC
 Buyer: TurbertJ
 PO Reference: Test PO Approval Workflow

PO Status: Pend Appr
 PO Date: 02/07/2013
 Budget Status: Not Chk'd
 Justification: No justification entered by buyer.

Review Lines

Select	Line	Item Description	Quantity UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	Copy Paper	900.0000 CT	40.00000	36,000.00	USD
<input type="checkbox"/>	2	Address Labels	50.0000 BX	10.00000	500.00	USD

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000115503: Awaiting Further Approvals

Approved: DOT-GERMAIN KATHLEEN (PO Amt Approver Less than \$10K, 02/07/13 - 11:01 AM)

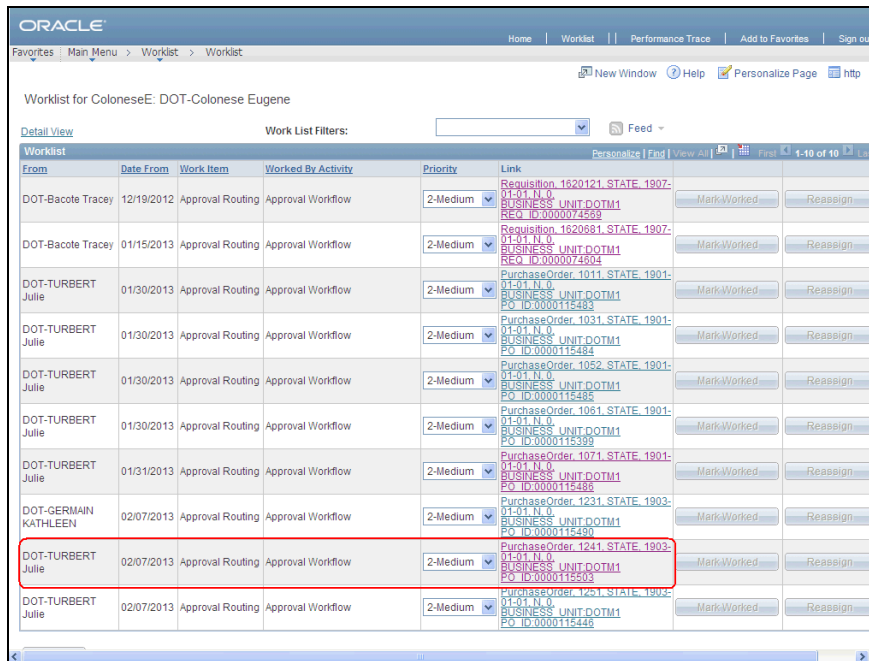
On Hold: Multiple Approvers (PO Amt Approver Less Than \$1M, 02/07/13 - 11:12 AM)

Information Request: DOT-TURBERT Julie (Information Request)

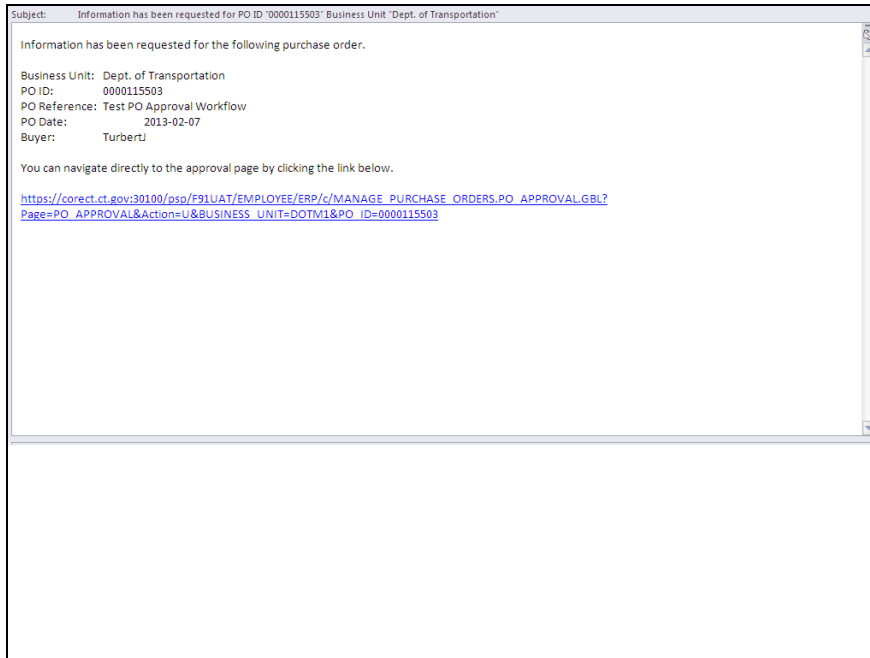
Comments: [Red box around Comments button]

PO Chartfield Approver

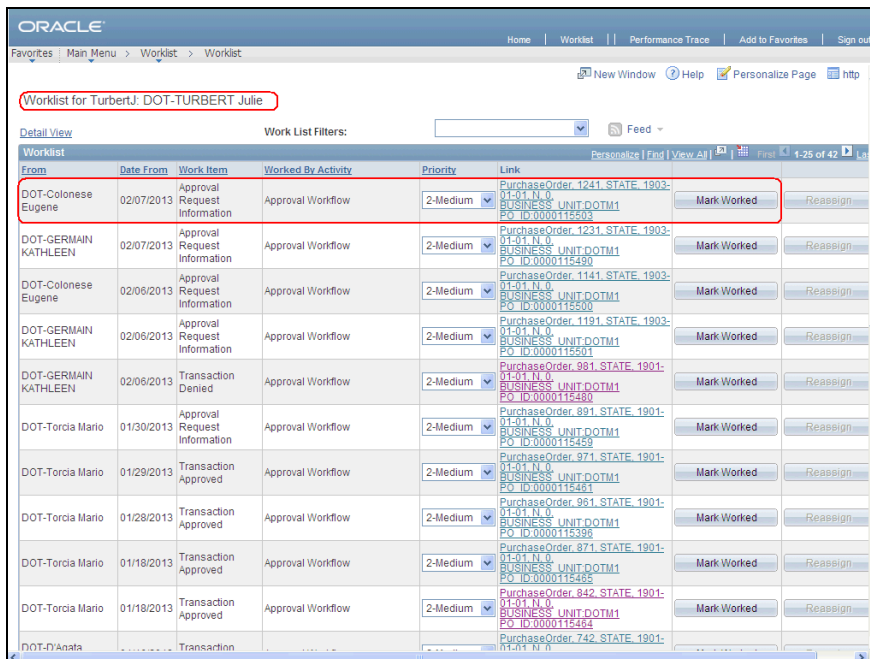
Step	Action
6.	The PO Amount Approval path shows the On Hold status for this approval step and that Comments were entered. The workflow shows an Information Request notification has been sent to the buyer.
7.	Click the Worklist link. Worklist



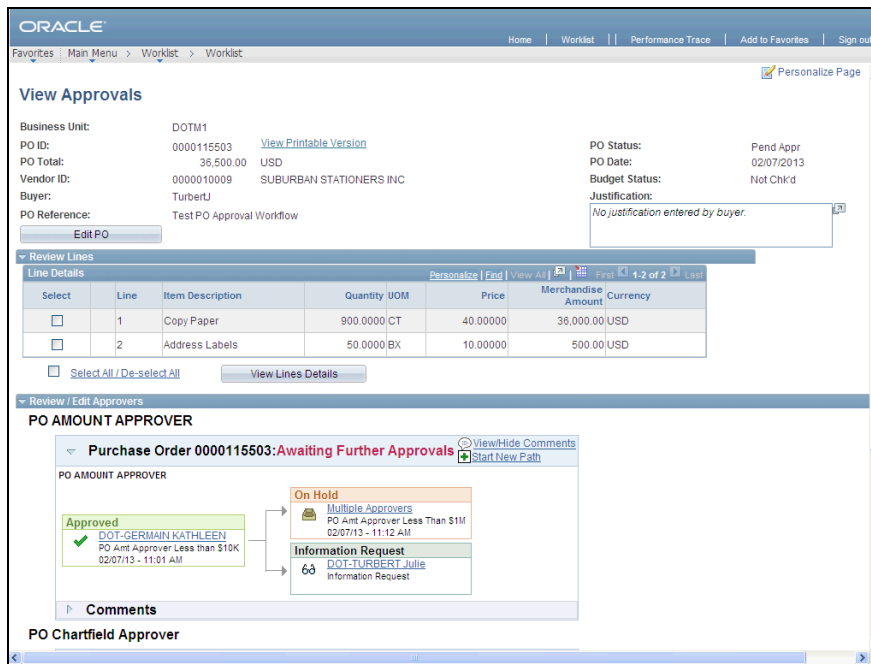
Step	Action
8.	The PO remains on the approver's worklist pending their action or a change is made to the PO that restarts the approval process.



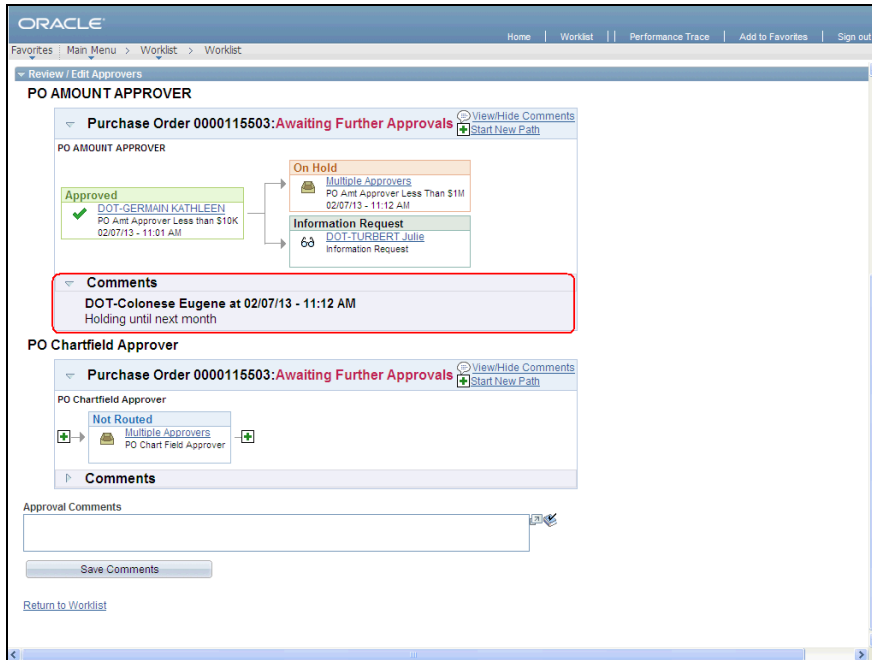
Step	Action
9.	The buyer receives a notification email with a link to access the approvals page for this item.



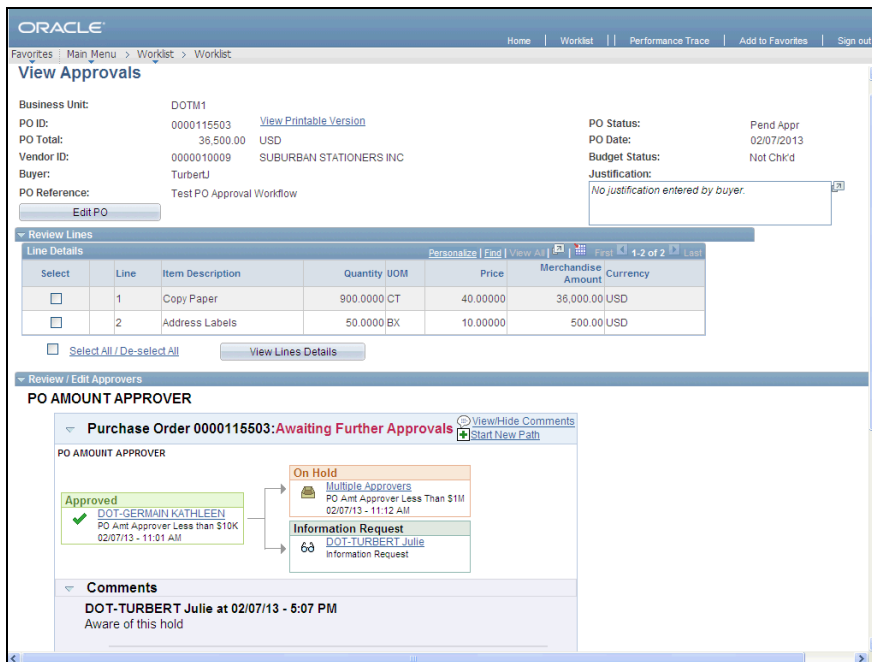
Step	Action
10.	The buyer clicks the PurchaseOrder, 1241, STATE, 1903-01-01, N, 0, BUSINESS_UNIT:DOTM1 link to review the approval. PurchaseOrder, 1241, STATE, 1903-01-01, N, 0, BUSINESS_UNIT:DOTM1 PO ID:0000115503



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



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. <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;"> <p style="text-align: center; margin: 0;">Save Comments</p> </div>



Step	Action
15.	The comment has been inserted above the approver's original comment.
16.	End of Procedure.