Approving a PO

Approvers access POs pending approval from the Worklist. After reviewing the information on the PO Approvals page, an approver clicks the Approval button to send it to the next approver or to process to dispatch.

Procedure

Navigation: Worklist

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>PO approvals can be accessed from the approver's Worklist. Approvers can use Work List Filters to select the types of approval items they wish to review. The filter options vary based on the items listed at the time of review and the user's roles. Column headings with an underscore can be sorted.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
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<td>------</td>
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</tr>
<tr>
<td>2.</td>
<td>An approver clicks a link from the list to view the approvals for that PO. Click the <strong>PurchaseOrder, 1241, State, 1903-01-01, N, 0, BUSINESS_UNIT:DOTM1 PO ID:0000115503</strong> link.</td>
</tr>
</tbody>
</table>
Step 3. The Purchase Order Approval page displays PO header information at the top, a Review Lines section and a Review/Edit Approvers section that displays the approval workflow.
### Step 4

The top section of the page contains PO header information.

There are two links:

- **View Printable Version** opens a copy of the entire PO.
- **Edit PO** allows the approver to review more information and if necessary, update the PO.
- **Justification** displays comments for approvers if the buyer has entered them.

### Step 5

Click the **View Printable Version** button to review the entire PO.
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>6.</td>
<td>Choose whether to display the accounting distributions.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>No</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 7.   | This is printable PDF version of the PO.  
Click the **Close** button. |
| 8.   | Approvers can view a PDF version showing the details of each line separately.  
Click the **Select** option to select the line to be viewed. |
| 9.   | Click the **View Lines Details** button. |
Step | Action
--- | ---
10. | This PDF displays the selected line and always includes the distribution details. Click the **Close** button.
11. Click the scrollbar to view the rest of the page.

12. The **Review/Edit Approvers** section displays approval workflow in a graphical format.

   In this example there are two approval paths. There are options for adding reviewers or approvers to a path. Users should never use the **Start New Path** option.

13. A PO may be routed to the worklist of several approvers.

   Click the **Multiple Approvers** link to view the list of approvers.
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>14.</td>
<td>Click the <strong>Close</strong> button.</td>
</tr>
</tbody>
</table>
| 15.  | The approver has the option to add **Approval Comments**.  

Click the **Approve** button.
Step | Action
--- | ---
16. | The workflow path shows this first step as **Approved**. The approver link changes to the approver's name. Clicking it brings up their contact information.

The second step in the path is now **Pending**. The PO is now visible in the worklists of the multiple approvers for that approval step.

Click the **Return to Worklist** link.
Step | Action
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17. | The approved PO is no longer listed in the approver's worklist.

The PO will not be listed in the buyer's worklist until all the approvals are complete or it is put on hold or denied prior to approval.
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| 18.  | Buyers and other Core-CT users with access can click the **View Approvals** link found in **Add/Update PO** and **Review PO Information** components of **Purchasing**.  
Click the **View Approvals** link. | ![View Approvals](image) |
| 19.  | Review the information. |
20. This screen shows the buyer's worklist filtered to view approved transactions.

After the PO is completely approved a link displays in the buyer's worklist. No email notification is sent.

Click the **Mark Worked** button to remove it from the worklist.
Step | Action
---|---
21. | The PO link no longer displays on the worklist. The buyer can use the View Approvals link on the PO to access the approvals history.
22. | End of Procedure.