

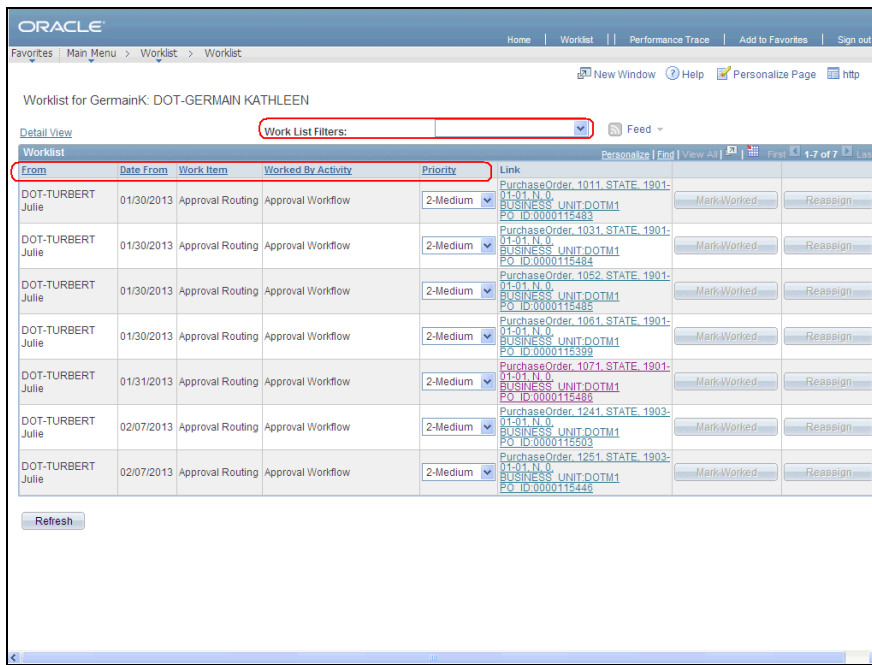
Approving a PO



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



Step	Action
1.	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.

ORACLE

Home | Worklist | Performance Trace | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

New Window | Help | Personalize Page | http

Worklist for GermainK: DOT-GERMAIN KATHLEEN

Detail View | Work List Filters: [] | Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
DOT-TURBERT Julie	01/30/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_1011.STATE_1903-01-01.N.0.BUSINESS_UNIT:DOTM1 PO_ID:0000115493	Mark Worked	Reassign
DOT-TURBERT Julie	01/30/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_1031.STATE_1903-01-01.N.0.BUSINESS_UNIT:DOTM1 PO_ID:0000115484	Mark Worked	Reassign
DOT-TURBERT Julie	01/30/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_1052.STATE_1903-01-01.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_1903-01-01.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_1903-01-01.N.0.BUSINESS_UNIT:DOTM1 PO_ID:0000115482	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_1903-01-01.N.0.BUSINESS_UNIT:DOTM1 PO_ID:0000115442	Mark Worked	Reassign

Refresh

Step	Action
2.	<p>An approver clicks a link from the list to view the approvals for that PO.</p> <p>Click the PurchaseOrder, 1241, State, 1903-01-01, N, 0, BUSINESS_UNIT:DOTM1 PO ID:0000115503 link.</p> <div style="border: 1px solid black; padding: 2px;"> <p>PurchaseOrder_1241.STATE_1903-01-01.N.0.BUSINESS_UNIT:DOTM1 PO_ID:0000115503</p> </div>

ORACLE
 Home | Worklist | Performance Trace | Add to Favorites | Sign out
 Favorites | Main Menu > Worklist > Worklist

Purchase Order Approval

Business Unit: DOTM1
 PO ID: 0000115503 [View Printable Version](#)
 PO Total: 36,500.00 USD
 Vendor ID: 0000010009 SUBURBAN STATIONERS INC
 Buyer: TurbertJ
 PO Reference: Test PO Approval Workflow [Edit PO](#)

PO Status: Pend Appr
 PO Date: 02/07/2013
 Budget Status: Not Chkd
 Justification:

Review Lines

Select	Line	Item Description	Quantity UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	Copy Paper	900.0000 CT	40.000000	36,000.00 USD	
<input type="checkbox"/>	2	Address Labels	50.0000 BX	10.000000	500.00 USD	

Select All / De-select All [View Lines Details](#)

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000115503: Pending [Start New Path](#)

PO AMOUNT APPROVER

Pending [Multiple Approvers](#) PO Amt Approver Less than \$10K → [Not Routed](#) [Multiple Approvers](#) PO Amt Approver Less Than \$1M

PO Chartfield Approver

Purchase Order 0000115503: Awaiting Further Approvals [Start New Path](#)

PO Chartfield Approver

[Not Routed](#) [Multiple Approvers](#) PO Chart Field Approver

Step	Action
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.

ORACLE
 Home | Worklist | Performance Trace | Add to Favorites | Sign out
 Favorites | Main Menu > Worklist > Worklist

Purchase Order Approval

Business Unit: DOTM1
 PO ID: 0000115503 [View Printable Version](#)
 PO Total: 36,500.00 USD
 Vendor ID: 0000010009 SUBURBAN STATIONERS INC
 Buyer: TurbertJ
 PO Reference: Test PO Approval Workflow [Edit PO](#)

PO Status: Pend Appr
 PO Date: 02/07/2013
 Budget Status: Not Chkd
 Justification:

Review Lines

Select	Line	Item Description	Quantity UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	Copy Paper	900.0000 CT	40.000000	36,000.00 USD	
<input type="checkbox"/>	2	Address Labels	50.0000 BX	10.000000	500.00 USD	

Select All / De-select All [View Lines Details](#)

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000115503: Pending [Start New Path](#)

PO AMOUNT APPROVER

Pending [Multiple Approvers](#) PO Amt Approver Less than \$10K → [Not Routed](#) [Multiple Approvers](#) PO Amt Approver Less Than \$1M

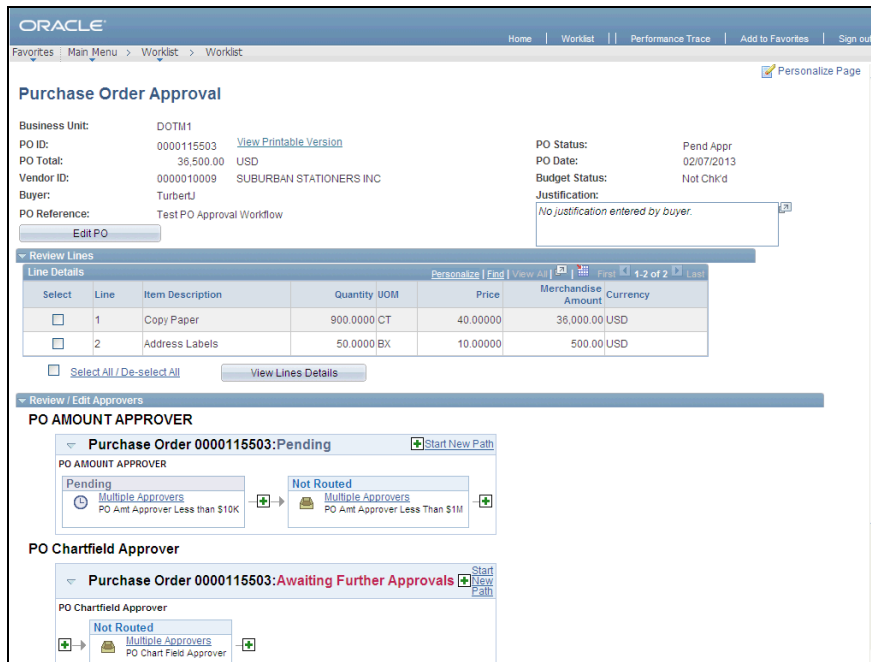
PO Chartfield Approver

Purchase Order 0000115503: Awaiting Further Approvals [Start New Path](#)

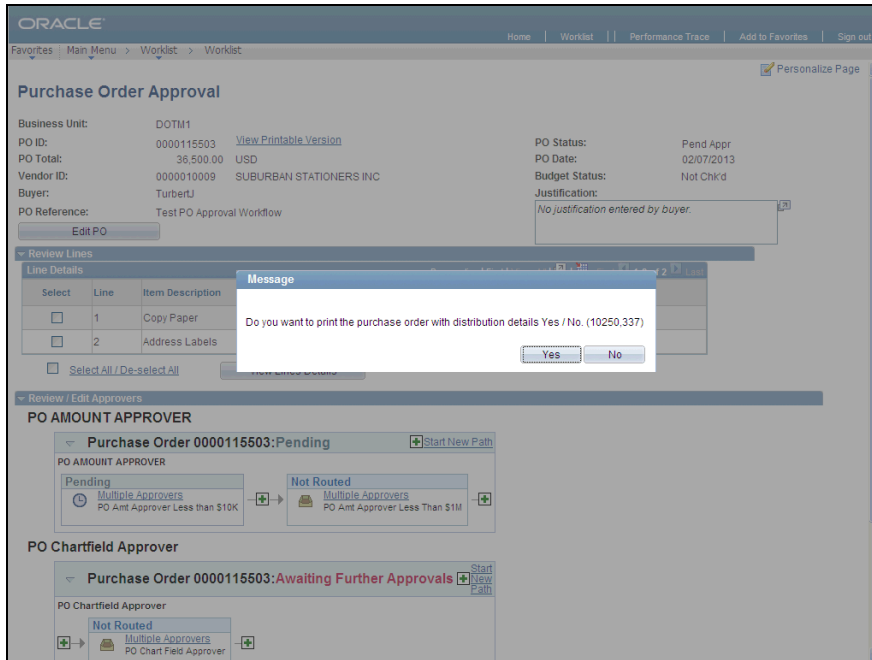
PO Chartfield Approver

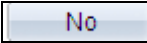
[Not Routed](#) [Multiple Approvers](#) PO Chart Field Approver

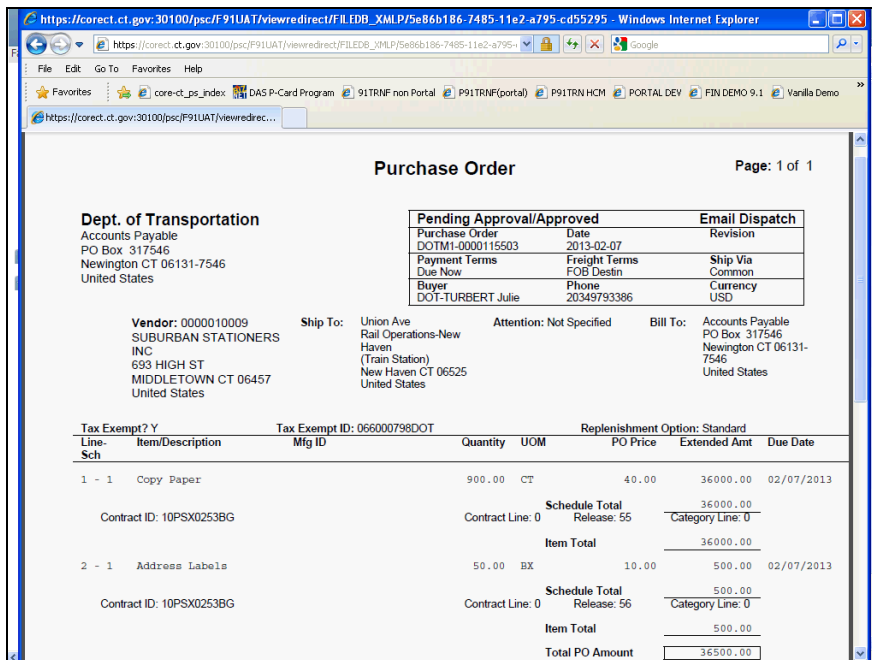
Step	Action
4.	<p>The top section of the page contains PO header information.</p> <p>There are two links:</p> <p>View Printable Version opens a copy of the entire PO.</p> <p>Edit PO allows the approver to review more information and if necessary, update the PO.</p> <p>Justification displays comments for approvers if the buyer has entered them.</p>




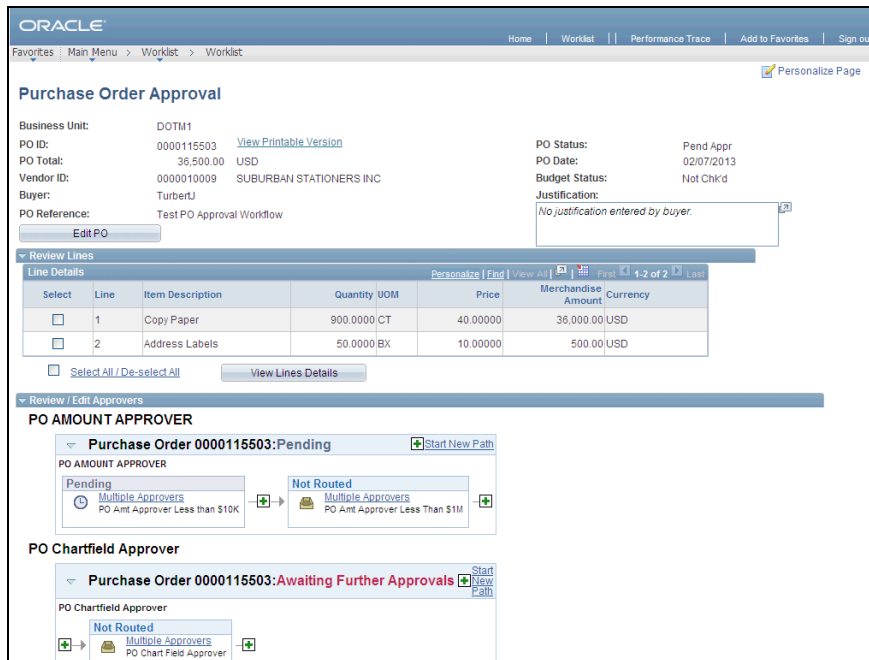
Step	Action
5.	<p>Click the View Printable Version button to review the entire PO.</p> <p>View Printable Version</p>



Step	Action
6.	<p>Choose whether to display the accounting distributions.</p> <p>Click the No button.</p> 



Step	Action
7.	<p>This is printable PDF version of the PO.</p> <p>Click the Close button.</p> 




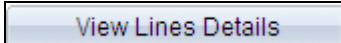
The screenshot shows the Oracle Purchase Order Approval interface. At the top, it displays 'Purchase Order Approval' with various details: Business Unit (DOTM1), PO ID (0000115503), PO Total (36,500.00 USD), Vendor ID (0000010009), Buyer (TurbertJ), and PO Reference (Test PO Approval Workflow). It also shows PO Status (Pend Appr), PO Date (02/07/2013), and Budget Status (Not Chk'd). A justification box contains the text 'No justification entered by buyer.'

Below the details is a 'Review Lines' section with a table:

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

Below the table are buttons for 'Select All / De-select All' and 'View Lines Details'. The 'View Lines Details' button is highlighted in the screenshot.

Below the review lines is a 'Review / Edit Approvers' section. It shows two approval paths for 'Purchase Order 0000115503: Pending'. The first path is 'PO AMOUNT APPROVER' with a 'Pending' status and 'Multiple Approvers' for 'PO Amt Approver Less than \$10K'. The second path is 'Not Routed' with 'Multiple Approvers' for 'PO Amt Approver Less Than \$1M'. There is also a 'PO Chartfield Approver' section with a 'Not Routed' status and 'Multiple Approvers' for 'PO Chart Field Approver'.

Step	Action
8.	<p>Approvers can view a PDF version showing the details of each line separately.</p> <p>Click the Select option to select the line to be viewed.</p> 
9.	<p>Click the View Lines Details button.</p> 

https://corect.ct.gov:30100/psc/F91UAT/viewredirect/FILEDB_XMLP/70966856-713f-11e2-88ca-8de4a7f - Windows Internet Explorer

https://corect.ct.gov:30100/psc/F91UAT/viewredirect/FILEDB_XMLP/70966856-713f-11e2-88ca-8de4a7f

File Edit Go To Favorites Help

core-ct_ps_index DAS P-Card Program 91TRNF non Portal P91TRNF(portal) P91TRN HCM PORTAL DEV FIN DEMO 9.1 Vanilla Demo

https://corect.ct.gov:30100/psc/F91UAT/viewredrec...

Purchase Order

Page: 1 of 1

Dept. of Transportation
Accounts Payable
PO Box 317546
Newington CT 06131-7546
United States

Vendor: 0000010009
SUBURBAN STATIONERS
INC
693 HIGH ST
MIDDLETOWN CT 06457
United States

Ship To: Union Ave
Rail Operations-New
Haven
(Train Station)
New Haven CT 06525
United States

Attention: Not Specified

Bill To: Accounts Payable
PO Box 317546
Newington CT 06131-7546
United States

Tax Exempt? Y Tax Exempt ID: 066000798DOT Replenishment Option: Standard

Pending Approval/Approved		Email Dispatch	
Purchase Order	Date	Revision	
DOTM1-0000115503	2013-02-07		
Payment Terms	Freight Terms	Ship Via	
Due Now	FOB Destin	Common	
Buyer	Phone	Currency	
DOT-TURBERT Julie	20349793386	USD	

Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1 - 1	Copy Paper		900.00	CT	40.00	36000.00	02/07/2013


DIST: 1

Chartfields	Status	Percentage	PO Qty	Amount
	Open	100.0000	900.0000	36000.0000

GLUnit	Account	Fund	Dept	Program	Class	BudRef
STATS	54060	1200	DOTS778	00000	10020	2013
		1	1			

Details/Tax

BaseAmt	BaseCurrency	Currency	Location	Consiged

Step	Action
10.	<p>This PDF displays the selected line and always includes the distribution details.</p> <p>Click the Close button.</p> 

ORACLE

Home | Worklist | Performance Trace | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

Personalize Page

Purchase Order Approval

Business Unit: DOTM1

PO ID: 0000115503 [View Printable Version](#)

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 Chkd

Justification:

[Edit PO](#)

Review Lines

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency
<input checked="" 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

[Select All / De-select All](#) [View Lines Details](#)

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000115503: Pending [Start New Path](#)

PO AMOUNT APPROVER

Pending

Multiple Approvers PO Amt Approver Less than \$10K

Not Routed

Multiple Approvers PO Amt Approver Less Than \$1M

PO Chartfield Approver

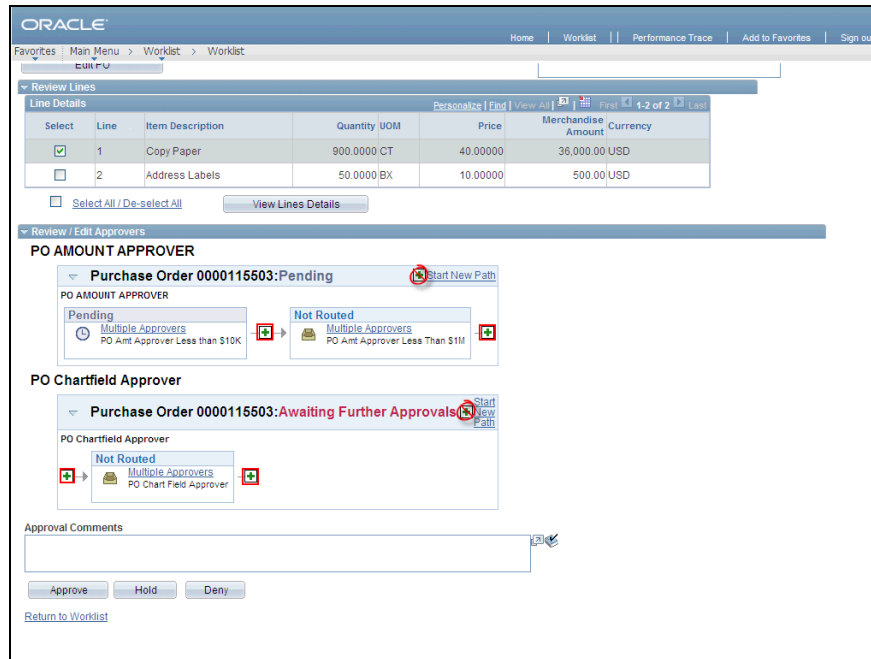
Purchase Order 0000115503: Awaiting Further Approvals [Start New Path](#)

PO Chartfield Approver

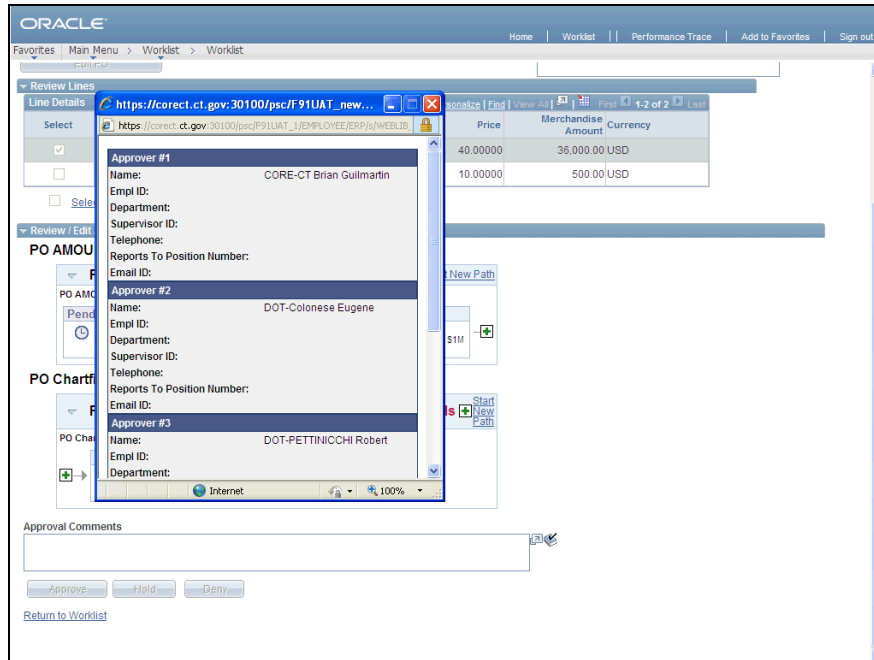
Not Routed


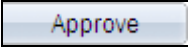
Multiple Approvers PO Chart Field Approver

Step	Action
11.	Click the scrollbar to view the rest of the page.



Step	Action
12.	<p>The Review/Edit Approvers section displays approval workflow in a graphical format.</p> <p>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.</p>
13.	<p>A PO may be routed to the worklist of several approvers.</p> <p>Click the Multiple Approvers link to view the list of approvers.</p> <p>Multiple Approvers</p>



Step	Action
14.	Click the Close button. 
15.	The approver has the option to add Approval Comments . Click the Approve button. 

The screenshot shows the Oracle 'View Approvals' interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Performance Trace', 'Add to Favorites', and 'Sign out'. Below that, a breadcrumb trail reads 'Favorites | Main Menu > Worklist > Worklist'. The main heading is 'View Approvals' with a 'Personalize Page' link. The page displays details for a Purchase Order (PO) with ID 0000115503, totaling 36,500.00 USD. The vendor is SUBURBAN STATIONERS INC, and the buyer is TurberLJ. The PO status is 'Pend Appr' and the date is 02/07/2013. A justification box contains the text 'No justification entered by buyer.' Below this, there are sections for 'Review Lines' and 'Review / Edit Approvers'. The 'PO AMOUNT APPROVER' section shows a workflow path: 'Approved' by DOT-GERMAIN KATHLEEN (PO Amt Approver Less than \$10K, 02/07/13 - 11:01 AM) leading to 'Pending' for 'Multiple Approvers' (PO Amt Approver Less Than \$1M). A 'Return to Worklist' link is visible at the bottom left of the screenshot.

Step	Action
16.	<p>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.</p> <p>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.</p> <p>Click the Return to Worklist link.</p> <p>Return to Worklist</p>

ORACLE

Home | Worklist | Performance Trace | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

New Window | Help | Personalize Page | http

Worklist for GermainK: DOT-GERMAIN KATHLEEN

Detail View | Work List Filters: [] | Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
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.0000115493	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.0000115484	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.1901:01-01.N.0.BUSINESS_UNIT.DOTM1.PO_ID.0000115486	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.0000115448	Mark Worked	Reassign

Refresh

Step	Action
17.	<p>The approved PO is no longer listed in the approver's worklist.</p> <p>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.</p>

ORACLE

Home | Worklist | Performance Trace | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs

New Window | Help | Personalize Page | http

Maintain Purchase Order

Purchase Order

Business Unit: DOTM1
PO ID: 0000115503

PO Status: Pend Appr
Budget Status: Not Chkd

Copy From: []

Hold From Further Processing

Header

*PO Date: 02/07/2013
*Vendor: 061043422F-001
*Vendor ID: 0000010009
*Buyer: TurbertJ
PO Reference: Test PO Approval Workflow

Receipt Status: Not Recvd
*Dispatch Method: Email

Amount Summary

Merchandise: 36,500.00
Freight/Tax/Misc.: 0.00
Total Amount: 36,500.00 USD
Encumbrance Balance:
Total PO Obligation: 36,500.00 USD

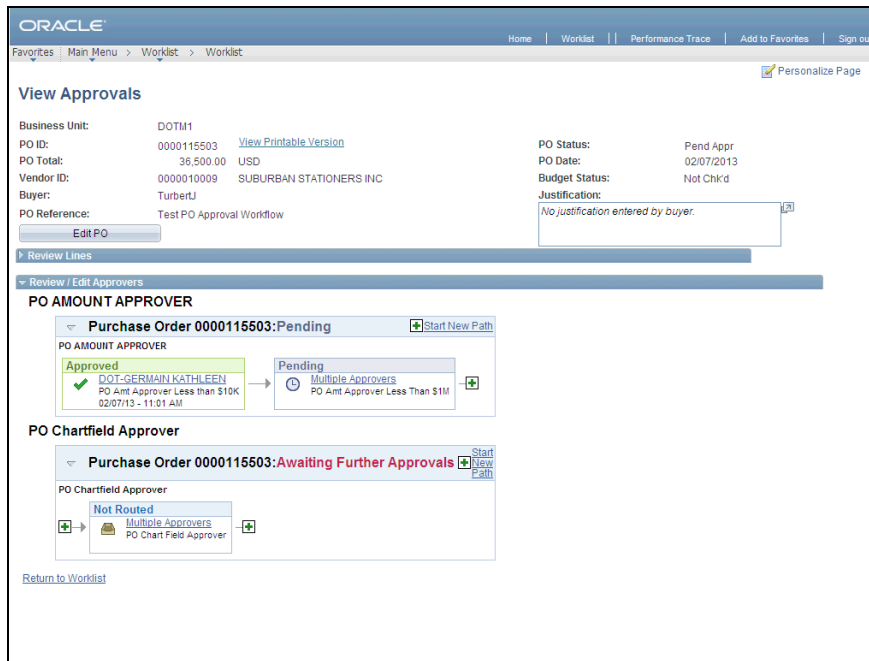
Add Items From: Purchasing Kit | Catalog | Item Search

Select Lines To Display: Line: [] To: [] Retrieve

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		Copy Paper	900.0000	CT	440000	40.00000	36,000.00	Pending
2		Address Labels	50.0000	BX	440000	10.00000	500.00	Pending

View Printable Version | Close Short All Lines | *Go to: [] More ...

Step	Action
18.	<p>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.</p> <p>Click the View Approvals link.</p> <p>View Approvals</p>

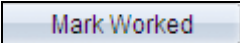


Step	Action
19.	Review the information.

The screenshot shows the Oracle Worklist interface. At the top, there is a navigation bar with 'ORACLE' logo, 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this, there are links for 'Favorites', 'Main Menu', and 'Worklist'. The main content area is titled 'Worklist for TurbertJ. DOT-TURBERT Julie'. A filter dropdown is set to 'Transaction Approved'. The worklist table has the following data:

From	Date From	Work Item	Worked By Activity	Priority	Link	Mark Worked	Reassign
DOT-GERMAIN KATHLEEN	02/02/2012	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder_1651_State_1905-01-01_N_0-BUSINESS_UNIT-DOTM1_PO_ID_0000103902	Mark Worked	Reassign
DOT-Torcia Mario	02/03/2013	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder_1681_State_1905-01-01_N_0-BUSINESS_UNIT-DOTM1_PO_ID_0000103904	Mark Worked	Reassign
DOT-GERMAIN KATHLEEN	02/03/2013	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder_1681_State_1905-01-01_N_0-BUSINESS_UNIT-DOTM1_PO_ID_0000103905	Mark Worked	Reassign
DOT-GERMAIN KATHLEEN	02/07/2013	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder_1241_STATE_1903-01-01_N_0-BUSINESS_UNIT-DOTM1_PO_ID_0000115503	Mark Worked	Reassign

Below the table is a 'Refresh' button.

Step	Action
20.	<p>This screen shows the buyer's worklist filtered to view approved transactions.</p> <p>After the PO is completely approved a link displays in the buyer's worklist. No email notification is sent.</p> <p>Click the Mark Worked button to remove it from the worklist.</p> 

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

New Window | Help | Personalize Page | http

Worklist for TurbertJ: DOT-TURBERT Julie

Detail View | Work List Filters: [] | Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
DOT-GERMAIN KATHLEEN	02/02/2012	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder_1651.State_1905-01-01.N.0.BUSINESS_UNIT_DOTM1 PO_ID:0000103802	Mark Worked	Reassign
DOT-Torcia Mario	02/03/2013	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder_1681.State_1905-01-01.N.0.BUSINESS_UNIT_DOTM1 PO_ID:0000103804	Mark Worked	Reassign
DOT-GERMAIN KATHLEEN	02/03/2013	Transaction Approved	Approval Workflow	2-Medium	PurchaseOrder_1681.State_1905-01-01.N.0.BUSINESS_UNIT_DOTM1 PO_ID:0000103805	Mark Worked	Reassign

Refresh

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.