

PO Entry: Entering Standard PO – Submitting the PO for Approval

Overview

A purchase order for less than \$1, 500, entered by an SIU PO Department Buyer, MUST be forwarded to an appropriate Fiscal Officer or Temporary Fiscal Officer Delegate for approval.

The PO can be submitted for approval during the initial entry; or, left in an "incomplete" status and submitted later.

At this point, we have completed all the steps to enter a Purchase Order and an Attachment. Now, we are ready to submit the Purchase Order for Approval. The Status of the Purchase Order is "Incomplete"; once submitted for Approval, the Status of the PO changes from "Incomplete" to "In Process".

You can verify the status of the Purchase Order, anytime, using the Purchase Order Summary function.

Navigation

- This learning cycle begins with the SIU Purchase Orders window.
 - Note: If you closed out of the application before you submitted the Purchase Order for approval, you will have to re-query the Purchase Order, using one of the following navigation paths in the process.
Purchase Orders>Purchase Order Summary, or
Purchase Orders>Purchase Orders.

Approval Process

- From the SIU Purchase Orders window, click the **Approve...** button; the **Approve Document** window opens.
- You will use the default tabbed region, **Approval Details**.
 - Disregard the **Encumbrance** section and go directly to the **Approval** section.
- The **Submit for Approval** checkbox is checked by default and the **Forward** checkbox is unchecked.
- SIU PO Department Buyers also need to check Forward.
- The **Forward From**, **Approval Path** and **Forward To** fields automatically populate.
 - If the Forward To field does NOT display the name of the person who has the appropriate approval authority, you may change it to a user who does.
- If desired, you may add a short message in the **Note** field.
- When the entries in the Approval section are complete, click the **OK** button at the bottom of the window.
- A blank SIU Purchase Orders window appears.
- If you have additional orders to enter, enter those at this time. If not, close the form to return to the Navigator.

Checking the Status of the PO

Once a Purchase Order has been forwarded for approval, the Status should change from "Incomplete" to "In Process".

- To verify the status, begin by selecting **Purchase Orders > Purchase Order Summary**
- Then re-query the Purchase Order.
 - Enter the PO number in the **Number** field; click the **Find** button.
 - The Purchase Order Headers window appears.
- The Approval Status column provides the information we need; however, the contents in this column are not completely visible. Use the horizontal scroll bar to scroll to the right to see the Approval Status column.
- The Approval Status for the PO should be "In Process". IMPORTANT NOTE: You can NOT open the Purchase Order when it is "In Process".
- This learning cycle is complete; click the **Close Form icon** on the Toolbar to return to the Navigator window.