

Scheduled Releases: Release Approval

This learning cycle demonstrated how to submit a Scheduled Release for Approval. Departments are encouraged to allow their Department Buyers to "approve" as well as "prepare" Scheduled Releases. If the Buyer DOES NOT HAVE APPROVAL AUTHORITY, be sure to review the latter portion of this learning cycle to learn how to Forward the Release to an authorized approver.

You can either approve the release at the time of entry or you can come back and do it later. To retrieve a previously entered release, the navigation path is:

Purchase Order Summary>PO Number nnnnn> Rel # >View Releases>Find.

After you have entered or retrieved the Scheduled Release, verify that the Status is **Incomplete**. Then its time to approve the release or forward it to an authorized approver.

Department Buyers with Approval Authority

- Begin by clicking the **Approve...** button.
- The Approve Document window opens with the Approval Details tabbed region displayed by default.
- Look at the Approval Region.
 - The Submit for Approval checkbox is automatically selected. Be sure to check this if it is not selected.
- Click in the **Note** field and add a comment specific to the Release being submitted for approval, e.g., "these are replacement lamps for the lab."

Note: SIU does not use the Transmission Methods region, at this time.

- Click **OK** to submit the document for approval.
- You will return to the Purchase Order Summary to Releases window.
 - Be sure to **verify the Status** field in the Headers region.
 - If you have approval authority, this region should now indicate that the Release is **Approved, Reserved**.
- If the Status is NOT Approved, Reserved, you may not be an 'Approver' for this budget purpose. Seek assistance from your Purchasing Department.
- If the Status is Approved, Reserved, your work is done; it's time to exit the form.
 - Use the Close Form icon to close this window.
- The Purchase Order Headers window opens; click Close Form again to return to the Navigator.

Forwarding to an Authorized Approver

Department Buyers without Approval Authority

You can either approve the release at the time of entry or you can come back and do it later. To retrieve a previously entered release Follow the navigation path noted above to locate the Release.

- Once you locate the appropriate Release, press Enter to open it.
 - (Remember that the Enter key activates the default button on a window.)
- You'll return to the Purchase Order Summary to Releases window, for the specific release number entered in the search criteria.
- Clicking the **Approve...** button.
- The Approve Document window opens displaying the Approval Details tab with the **Submit for Approval** check box already checked by default.
 - Leave that checked because we are submitting the release to the person that actually can approve it.
- Click in the **Forward** checkbox

- After a few seconds, the **Forward From** and **Approval Path** fields populate with default information.
- The **Forward To** field is also enabled.
- Click in the **Forward To** field to activate the LOV indicator.
- Type in just a few letters of the last name of the person you want to forward the release to and press **Tab**.
- The Employees LOV appears displaying a short list of employees by last name, starting with the letters we entered.
- Select the person you want to approve the release.
- Click OK. (You may also press enter.)

Note: The name has to be entered into the field exactly as it appears in the HR tables. It is always a good idea to use the LOV so that there are no mistakes.

- The name selected is displayed in the **Forward To** field.
- Now, you need to enter some information about this release in the Note field to help the approver understand what the reason is for the Release.
- The cursor automatically advances to the Note field, so you can just start typing.
- Your note should help the Approver understand why the Release is being forwarded, e.g., I am forwarding this release for approval on Budget Purpose nnnnnn.
- Click **OK**.
- After completing the note, that's all you have to do.
- The Purchase Order Summary to Releases window displays.
- After submitting, verify that the forwarded release was been submitted.
- Close the Form.
- The Purchase Order Headers summary window displays. The current record indicator is resting on the record just completed.
- Press **Enter** to open the release.
- A Note tells us we cannot open this document because it is in one of several possible 'states'.
- You can almost see the 'state' from the first two letters visible in the Approval Status field.
- You can also scroll to see status or customize this folder so the Approval Status field appears when you open the window.
- Close the Note window and then close the form.
- We will return to the application navigator for SIU Department Buyer.