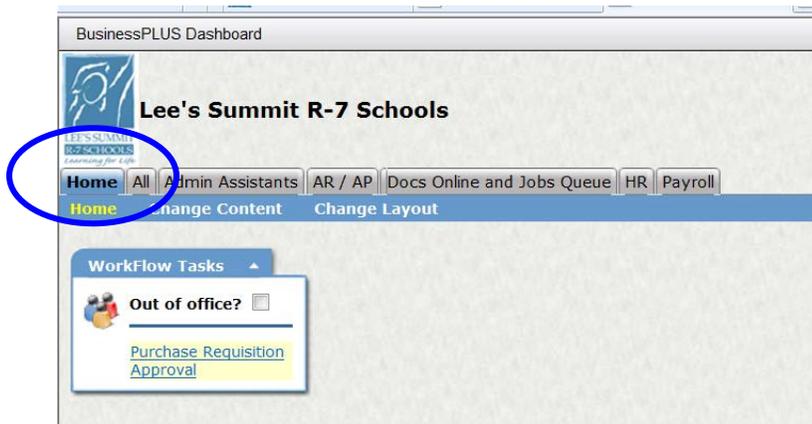


PURCHASE REQUISITION APPROVAL PROCESS

A Purchase Requisition must move through an approval process to become a Purchase Order. This guide will explain how to approve the Purchase Request and how to view the Workflow of the request.

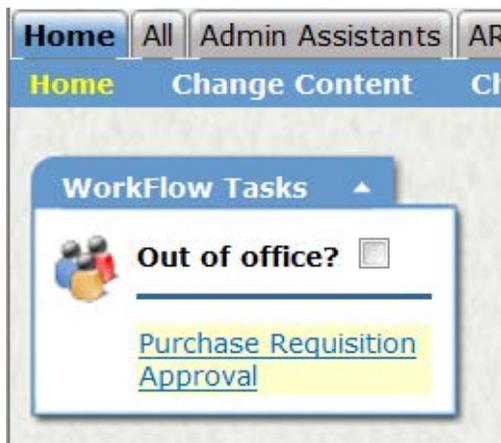
The first step in the approval process is for the originating person entering the Purchase Requisition to approve the request.

From your BusinessPlus dashboard, click on the “Home” tab.



Workflow Tasks will be identified when you have purchase requests (PR) that are waiting your approval.

When you have Purchase Requests that need to be approved, they will be shown on the dashboard, under “Workflow Tasks” tab.



NOTE: When you do not see a message under “Workflow Tasks”, press the F5 button. This will refresh the screen. Any requests needing approval will generate at that time.

Click on the Purchase Requisition Approval message. You will be directed to the screen, as shown below.

The screenshot shows the SunGard Task List application in a Windows Internet Explorer browser. The main content area displays a 'History' table and a 'Summary' section. The 'History' table has columns for USER ID, WHEN IN, NAME, WHEN OUT, GROUP, and SCREEN. The 'Summary' section shows details for Purchase Request# R0011287, requested by SANDY NAIL, with an entry date of 1/25/2012. Below this is an 'ACCOUNT INFORMATION' table with columns for Item#, Quantity, Price, Item Total, Lg, Key, Object, and Amt/Pct. The account information shows a single line item for 'ADDING MACHINE TAPE' with a quantity of 200.000 and a price of 200.000.

USER ID	WHEN IN	NAME	WHEN OUT	GROUP	SCREEN
SNAIL	01/25/2012 15:19:02	SANDY NAIL			
TBA		Future Task Item	To Be Assigned	wf ADMIN 340	
TBA		Future Task Item	To Be Assigned	wf Purchasing	

Summary

Purchase Request# = R0011287
PR Total\$ =
Requested By = SANDY NAIL
Request Date = 1/25/2012
Entry Date = 1/25/2012
Vendor = 002183-OFFICE MAX

Item#	Quantity	Price	Item Total	Lg	Key	Object	Amt/Pct
0001	200.000				GL G2521	6411	50%
			GL G2521117	6411			50%

Item Description
ADDING MACHINE TAPE

To approve the PR, check the box to the left of the Purchase Request number.

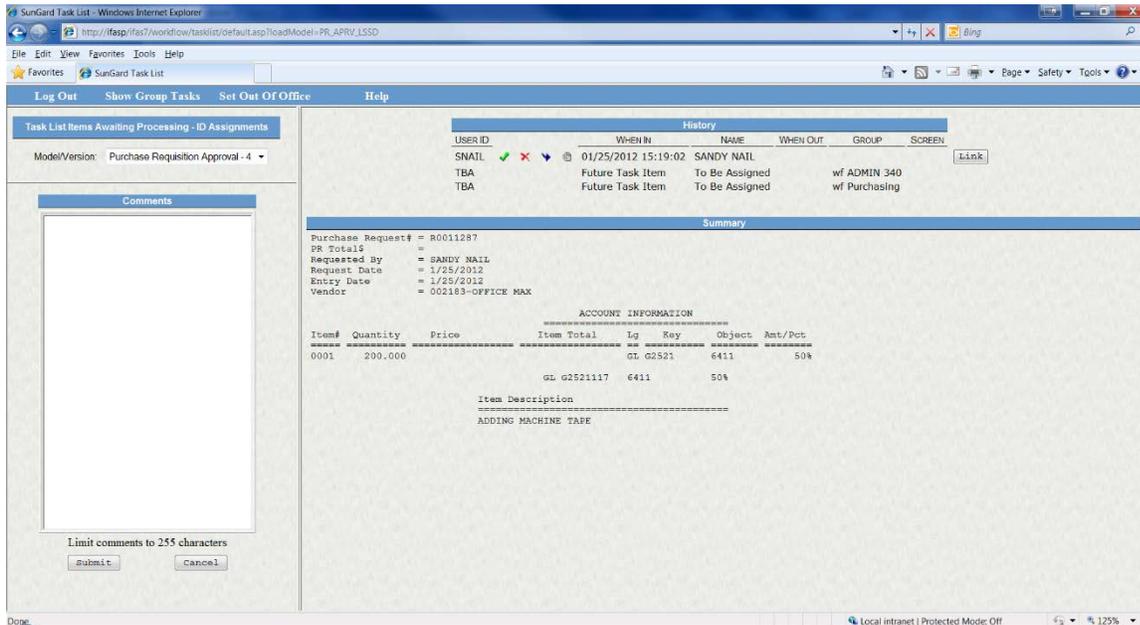
This close-up screenshot shows the 'Task List Items Awaiting Processing - ID Assignments' section. It displays a table with columns for PR, PO, Vend, and Stat. The first row shows PR R0011287, PO 002183, and Stat PR. A blue circle highlights the checkbox to the left of the PR number, which is currently unchecked.

PR	PO	Vend	Stat
<input type="checkbox"/> R0011287	002183	002183	PR

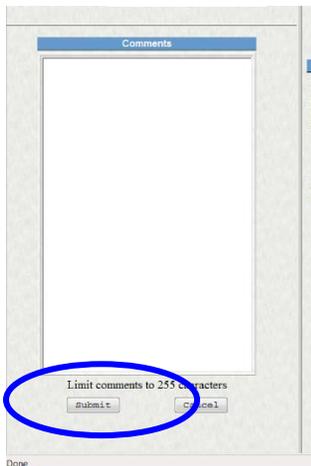
To approve the PR request and send it to the next approver, click on the “green checkmark”.

To reject the PR request, click on the “red X”.

When you click on the “green checkmark” to approve the PR, the next screen will generate:



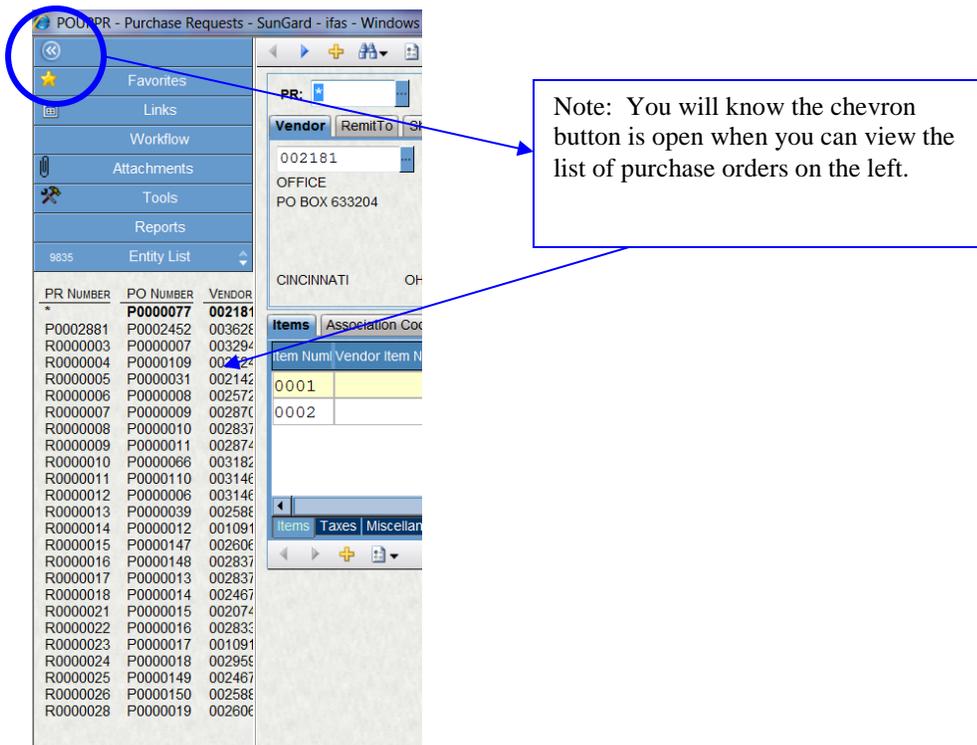
It is not required to type comments in the comment box. It is however, required to select the “Submit” button to approve the PR.



This completes the approval process for the originator of the purchase request.

When you need to know the status of a Purchase Request, it is possible to follow the “Workflow”. To view the status, click on Enter PR, Change PR (until PO) or Lookup PR/PO from your dashboard.

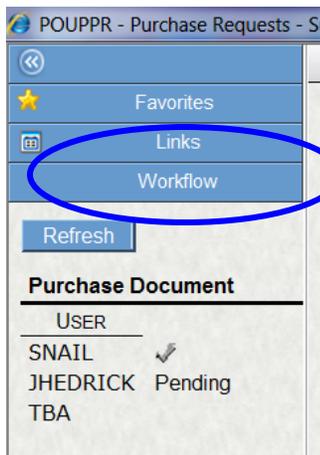
This will bring up the POUPPR screen. Make sure to open the “chevron” button.



Click on the binoculars to do a Find/Search.

In the PR box, type in your PR number: RXXXXXXX and hit Enter. This will bring up the purchase request you want to see the status of.

On the left-hand side of the screen click on the Workflow tab.



This allows you to view where in the approval process the purchase request is. The Purchasing Department will always be the final approver.