



Approving Purchase Orders

Every Purchase Order must be approved before it can be printed and sent to the supplier. Also the funds are not committed until the approval process is carried out.

Approve Document - 1739196

Approval Details Additional Options

Encumbrance

Reserve Unreserve Unreserve Date

Use GL Override Use Document GL Date to Unreserve Accounting Date

Approval

Submit for Approval Forward From PARKER, Mrs Helen

Forward Approval Path KA_PURCHASING

Forward To

Note

Change

Summary

Transmission Methods

Print XML

Fax FAX Number EDI

E-Mail E-Mail Address

OK Cancel (B)

PLEASE NOTE: - If you have a high enough purchasing limit, you do not need to send the Purchase order onto to someone else to approve. Just leave the **Forward** box **unticked** and click on the **OK** button.

To approve or forward your purchase order

1. Click in the **Reserve** field.
2. Click in the **Submit for Approval** field.
3. Click in the **Forward** check box as in the example above.
4. This will un-grey the other boxes and your name will default into the box marked **Forward From**.
5. The Approval Path will start with your department code so enter **XX** and press tab. Choose **XX_Purchasing** from the two options available.

INV Detailed Procedure Approving Purchase Orders

6. Enter the surname of the person you wish to approve the order into the **Forward To** box (in upper case) and press the tab key.
7. Click **Print**. There is a set up you can complete so that you don't have to tick the print box as the system will automatically print the order for you. Refer to Appendix C.
8. Click **OK** and a note advising you 'Your Budgetary Control action completed successfully' will display, just click **OK**.
9. Your purchase order status will change to Approved, Reserved if you approved it yourself. Or to In Process if you forwarded it to someone else.

The screenshot displays a software window titled "Purchase Orders - 1739196". The header area contains the following fields:

- Operating Unit: Cambridge University
- Created: 09-DEC-2013 11:16:30
- PO, Rev: 1739196 0
- Type: Standard Purchase Order
- Supplier: STARLAB (U K) LTD
- Site: MILTON KEYNES
- Contact: Markham, Joyce
- Ship-To: KA
- Bill-To: KA Accounts Office 1
- Currency: GBP
- Buyer: PARKER, Mrs Helen
- Status: Approved, Reserved (circled in red)
- Total: 10.00
- Description: Gloves

Below the header are tabs for "Lines", "Price Reference", "Reference Documents", "More", and "Agreement". The "Lines" tab is active, showing a table with the following data:

Num	Item	Rev	Category	Description	UOM	Quantity	Price	Promised	Need-By
1	HCA0001		HCA	GLOVES - DOMESTIC	Each	4	2.5		20-DEC-2

At the bottom of the window, there is an "Item" field with the value "HCA0001" and a description: "GLOVES - DOMESTIC BLUE INDUSTRIAL NITRILE MEDIUM-PAIR".