

Editing Document –Disrupting Approval Workflow

Purchaser needs to make a change to a purchasing document while the status = “Awaiting Approval.”

Display Purchase Order

Buttons: Edit, Print Preview, Check, Close, Show my Tasks, Copy, Related Links

Purchase Order Number: 4300385822 Purchase Order Type: Standard PO Status: Awaiting Approval Document Date: 01/14/2014 Total Value (Gross): 15,000.00 USD Smart Number Supplier: MIGHTY FINE INC

Overview | Header | Items | Notes and Attachments | **Approval** | Tracking

Current Status: Finished Header Approval Note:

Current Process Step:

Currently Processed By:

Approval Process Data

Sequence	Process Step	Status	Processor	Received On	Processed On
• 001	SRM Purchase Order Approval	Open (No Decision Made)	Karen Patterson, Leslie Wyatt		
• 002	SRM Purchase Order Approval	Open (No Decision Made)	Corey Hogue, Debra Chernosoff, Joseph Haverstick, Walter Neugebauer, Rita Shaffer, Cedric		
• 003	SRM Purchase Order Approval	Open (No Decision Made)	Randall Sears, Timothy Holmes, Valerie Jacobs, Wendie Robert Wolff, Theron Perez, J		

1. As soon as the EDIT button has been selected, the following messages will display

Display Purchase Order

Buttons: Edit, Print Preview, Check, Close, Show my Tasks, Copy, Related Links

Purchase Order Number: 4300385822 Purchase Order Type: Standard PO Status: Awaiting Approval

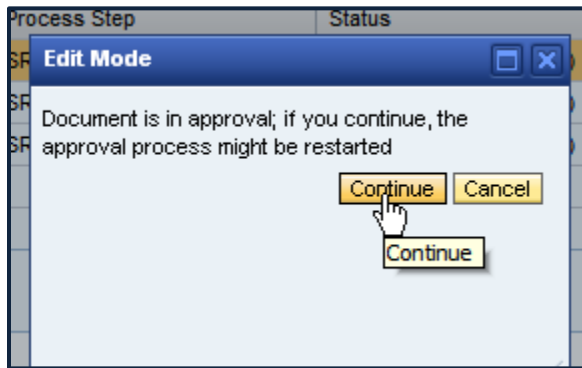
- a. Select the OK button

Additional Information

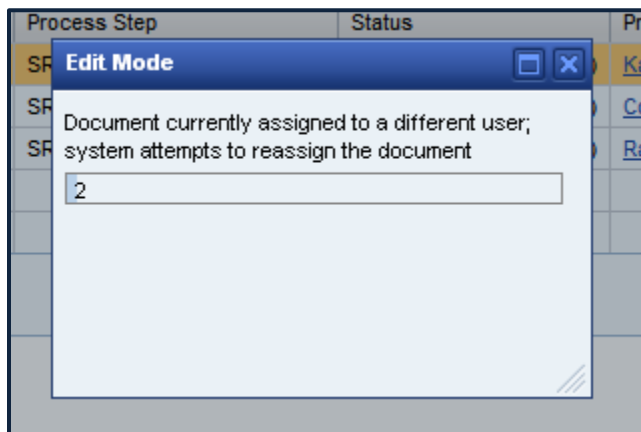
The document is in approval
Any document changes may lead to an adaptation
of the workflow process

Buttons: OK, Cancel

- b. Select the CONTINUE button

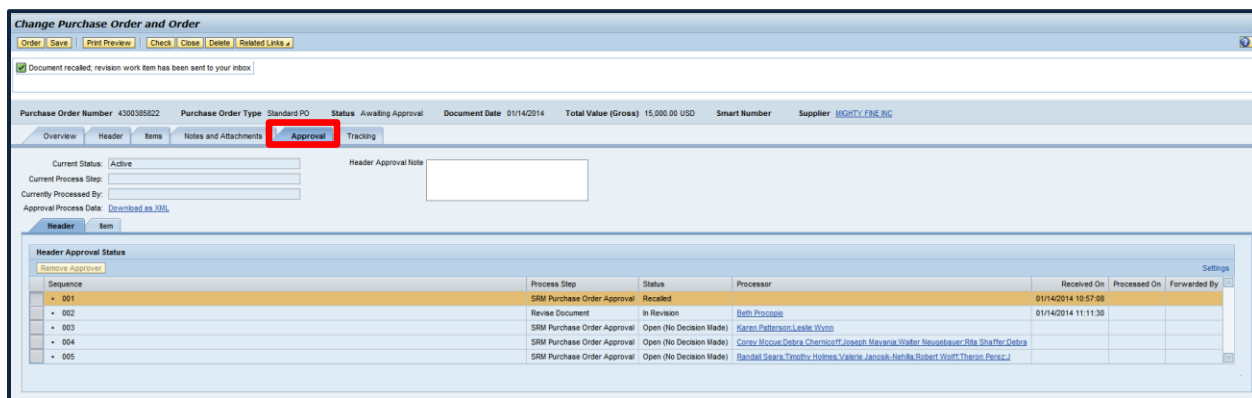


- c. A count down will display



2. "Edit" mode of the document is enabled

- a. Note any messages and navigate to "Approval" tab



3. Proceed with making changes. Once changes have been completed select the ORDER button.

Change Purchase Order and Order

Order Save Print Preview Check Close Delete Related Links

Purchase Order Number 4300385822 Purchase Order Type Standard PO

Overview Header Items Notes and Attachments Approval

4. Note the following information on the "Approval" tab

Current Status: Active

Current Process Step: SRM Purchase Order Approval

Currently Processed By: Karen Patterson, Leslie Wynn

Approval Process Data: [Download as XML](#)

Header Approval Note

Header

Item

Header Approval Status

Remove Approver

Sequence	Process Step	Status	Processor	Received On	Processed On / Forwarded By	Settings
001	SRM Purchase Order Approval	Recalled		01/14/2014 10:57:00		
002	Review Document	Document Reviewed	Beth Prosser	01/14/2014 11:11:30	01/14/2014 11:14:22	
003	SRM Purchase Order Approval	Open (No Decision Made)	Karen Patterson, Leslie Wynn	01/14/2014 11:14:20		
004	SRM Purchase Order Approval	Open (No Decision Made)	Cory Mose, Debra Chernickoff, Joseph Mayana, Walter Neugebauer, Rita Shaffer, Debra			
005	SRM Purchase Order Approval	Open (No Decision Made)	Randal Sears, Timothy Holmes, Valerie Janosik, Nehila Robert Wolff, Theron Perez, J			

Note: If required changes are not "Ordered" and document is put in "SAVED" status, when searching for the document in the POWL, the status will be displayed as shown below = "In your inbox"

View: [Standard View] Create Purchase Order Create with Reference Copy Display Edit Delete Purchase Order Response Notify Recipient Print Preview Related Export							
Purchase Order Number	Purchase Order Name	Item Number	Item Name	Status	Supplier Name	Total Value	Currency
4300385822	Lines:	1	Disrupting workflow	In your inbox	GHITY FINE INC	15,000.00	USD

5. Select the PO to be displayed

Note that there is no EDIT button and the following message is displayed.

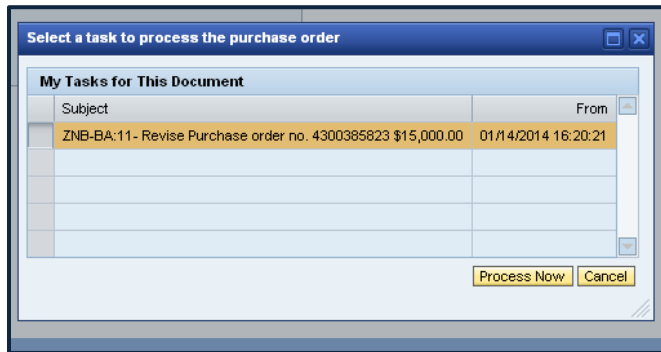
Display Purchase Order

Print Preview Check Close Show my Tasks Copy Related Links

☒ You have an open task for this document; choose "Show My Tasks"

6. In order to make changes, you must select the SHOW MY TASKS button

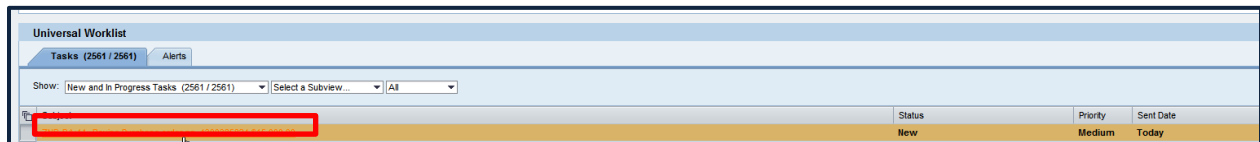
The following is displayed:



7. Select the PROCESS NOW button
 - a. The purchasing document goes into edit mode.
 - b. A change must take place prior to selecting the ORDER button

Another way to make “Edits” to a purchasing document that is “In your inbox”:

8. Go to your Universal Worklist (UWL) and select the workitem:



9. The document appears in "Edit" mode:

History Favorites View

Purchase Order Details - QF2 - Windows Internet Explorer

Options

Change Purchase Order and Order

Order Save Print Preview Check Close Delete Related Links

Purchase Order Number: 4300385824 Purchase Order Type: Standard PO Status: Awaiting Approval Document Date: 01/14/2014 Total Value (Gross): 15,000.00 USD

Smart Number Supplier: MIGHTY FINE INC

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: Second document
☒ Smart Number is External

Purchase Order Number: 4300385824
 PO Name: Testing disrupting Workflow

Supplier: 148503 [MIGHTY FINE INC](#)

Requester: 701282 [Beth Procopio](#)

Recipient: 701282 [Beth Procopio](#)

Location: 300398 [CORR SCI Greene](#)

Ship-To Address: 1 [EXEC BRANCH](#)

Purchasing Organization: Corrections Purchasing Organization

Purchasing Group: 1149 Purchasing Group [Show Members](#)

Total Value (Net): 15,000.00

Note to Supplier: Testing Split asset with "A" account assignment category - I would like to see what the backend looks like.

Internal Note:

Item Overview

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition Remove Condition Process All Items

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Order Type	Condition
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10. Make sure all edits are made and select the ORDER button