

Reviewing and Approving Procurement Documents

There are three types of documents that might need approval:

- Solicitations
- Contracts
- Purchase Orders (POs)

General Approval Guidelines:

1. Review the documents to ensure the items requested, and the final documents are in line with procurement and legal policies
2. Review the documents to ensure that the request or final documents are appropriately coded for budget and payment
 - a. POs created from Shopping Carts have account information;
 - b. Solicitations and Contracts do not have account information
3. Review the document to ensure that the appropriate award method was utilized
4. Approve or reject the document only after carefully reviewing it

Three basic tasks need to be completed when reviewing procurement documents:

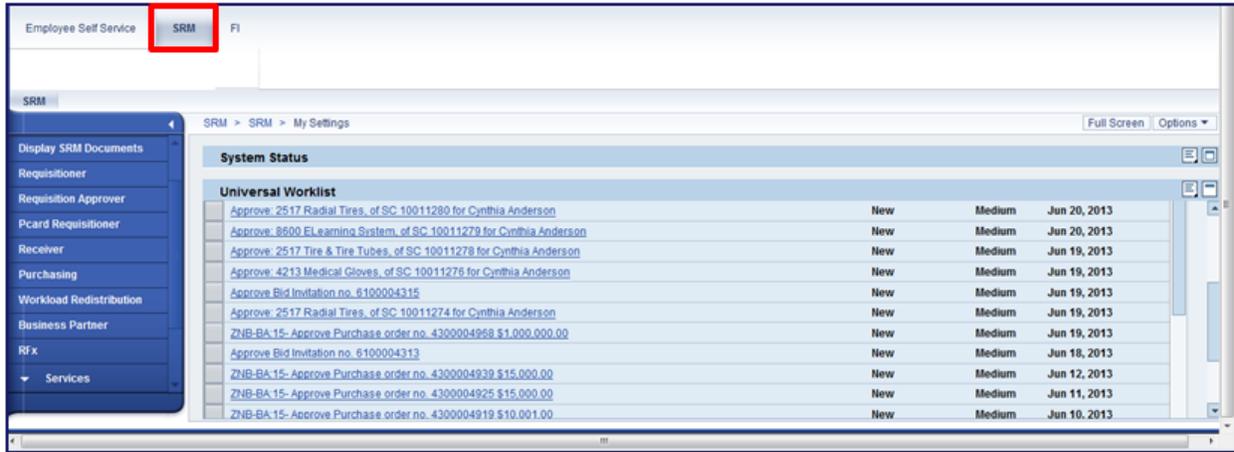
1. Select the document needing approval
2. Review the document's details to make sure they adhere to the guidelines
3. Approve or reject the document

Accessing the Universal Worklist:

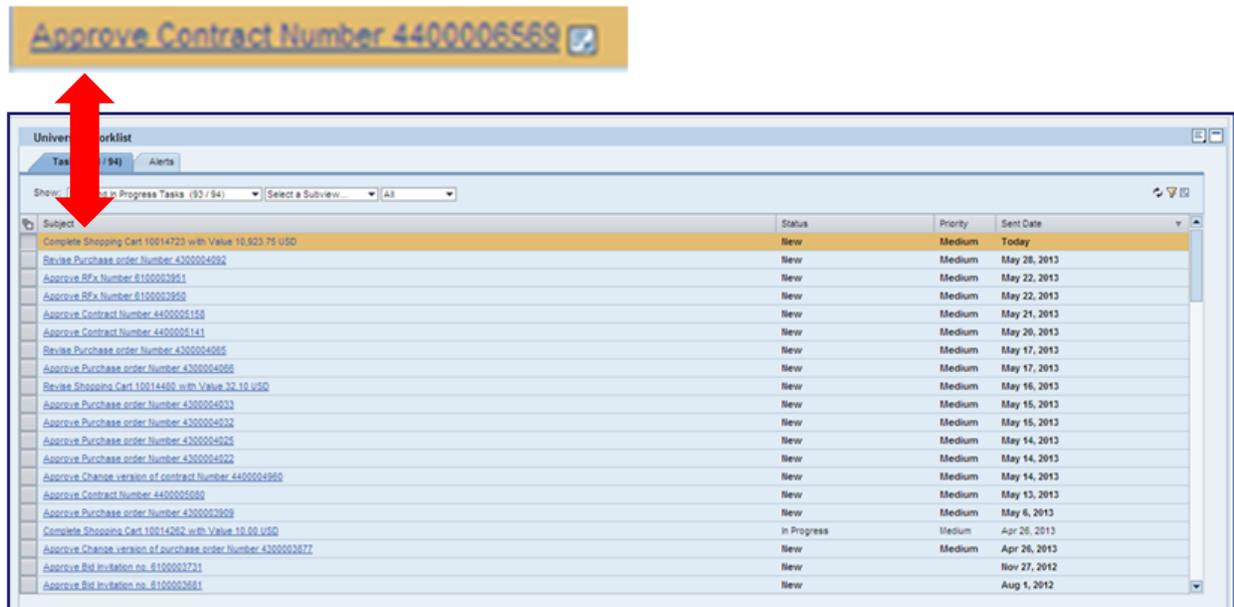
1. Universal Worklist accessed from the Employee Self Service (ESS) Home Page, will display all tasks (i.e.: leave, travel expense report, procurement document approvals)
 - Only Human Resources and LSO processes should be handled from this tab



2. Universal Worklist accessed from the SRM Home Page, will display only procurement tasks (i.e.: Solicitations, Contracts, POs, Shopping Carts)
 - o This is where all procurement documents should be processed



3. View the document you wish to approve by selecting the link in the Universal Worklist



4. The General Header Data on the Overview tab is displayed when a PO is selected

Display Purchase Order (Approval Mode)

Approve | Reject | Save | Print Preview | Close | Related Links

Purchase Order Number: 430030009 (Change Version) | Purchase Order Type: Standard PO | Status: Awaiting Approval | Document Date: 08/03/2013 | Total Value (Gross): 20,586.00 USD | Smart Number: | Supplier: GOODYEAR TIRE & RUBBER COMPANY INC

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

General Header Data

Smart Number: 2517 Tires for Training
 Smart Number is External
 Note to Supplier:
 Internal Note:
 Purchase Order Number: 430030009
 PO Name: 2517 Tires for Training
 Supplier: 161302 GOODYEAR TIRE & RUBBER COMPANY INC
 Requester: 703389 Cynthia Anderson
 Recipient: 703389 Cynthia Anderson
 Location: 301375 DGS Bureau of Procurement
 Ship-To Address: 1 EXEC BRANCH
 Purchasing Organization: COPA Purchasing Organization
 Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)
 Total Value (Net): 20,586.00

Item Overview

Details | Add Item | Copy | Paste | Duplicate | Create | Undo | Propose Sources of Supply | Add Condition | Remove Condition | Process All Items | Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
1		Material	1	24540R18 All Season Tires	25172504	100.00	EA	205.86	USD	1	205.86						08/19/2013	Cost Center	144401000

Total Value (Net): 20,586.00 USD
 Total Tax: 0.00 USD
 Total Value (Gross): 20,586.00 USD

5. The RFX Parameters on the RFX Information tab is displayed when the RFX document is selected

Approve RFX :

Save | Print Preview | Close | Related Links | Approve | Reject

RFX Number: 6100004531 | Smart Number: Test Approval 8-26-13 | Type: Invitation For Bid | Status: Awaiting Approval | Created On: 08/26/2013 14:58:30 | Created By: Cynthia Anderson | Time Zone: EST
 Number of Suppliers: 1 | Number of Items: 1 | Version Number: | Version Type: | Active Version: | External Version Number: |

RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

RFX Parameters | Questions | Notes and Attachments | Conditions

Identification

Smart Number: Test Approval 8-26-13
 Smart Number is External
 RFX Type: Invitation For Bid
 Bid Description: 4618 Hard Hat
 Publication Type: Public RFX

Event Parameters

Detailed Price Information: Price with Conditions
 Follow-On Document: Purchase Order
 Bidder Can Change RFX Responses:
 Allow Multiple RFX Responses for Each Company:

Scenario Award/Contract

Organization

Purchasing Organization: COPA Purchasing Organization
 Purchasing Group: XCS - DGS Cynthia K Anderson [Show Members](#)

Dates

Start Date: 08/27/2013 15:00:00
 Submission Deadline: 08/28/2013 08:00:00
 Opening Date: 08/28/2013 09:00:00

Partners and Delivery Information

Details | Add | Send E-Mail | Call | Clear | Filter Settings

Function	Number	Name	Phone Number
• Requester	337326	Cynthia Anderson	
• Goods Recipient			
• Responsible Employee	337326	Cynthia Anderson	
• Ship-To Address	300001	EXEC BRANCH	
• Location	73	DGS	717-787-5996

6. The General Header Data on the Overview tab is displayed when a Contract is selected

Approve Agency Contract 4400011838

Contract Number: 4400011838 Smart Number: Contract Type: Agency Contract Status: Awaiting Approval Supplier: 117919 HERRIE BROS INC Contract Owner: 703389 Cynthia Anderson

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

General Header Data

Contract Number: 4400011838 Contract Owner: 703389 Cynthia Anderson
 Smart Number: Target Value/ Currency: 500,000.00 USD
 Smart Number is External Release Value: 0.00 USD
 Contract Description: HVAC Maintenance for Rare Vaults Basic Contract:
 Supplier: 117919 HERRIE BROS INC
 Valid From / To: 09/04/2013 - 09/03/2014
 Purchasing Organization: COPA Purchasing Organization
 Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)

Items

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
1	Normal	1		1 YR HVAC Maintenance per SOW	72151200	0.000		YR	9,000.00	9,000.00	USD	1 YR		0
2	Normal	2		1 YR Emergency Response M-F Nrm Hrs	72151200	0.000		YR	1,000.00	1,000.00	USD	1 YR		0
3	Normal	3		1 YR Emergency Response M-F OT Hrs	72151200	0.000		YR	1,100.00	1,100.00	USD	1 YR		0
4	Normal	4		1 YR Emergency Response Holiday/Weekends	72151200	0.000		YR	2,000.00	2,000.00	USD	1 YR		0

7. The Tracking tab displays the Version Overview containing all versions (change versions) of the document
8. Each version is associated with the procurement document
9. Select the ITEM NUMBER to review the corresponding document

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

Library: United States Coliar

Item	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
Contract	251701 - Tires, Auto, Truck, OTR & Farm	4400000813		Released	07/05/2011	12,000,000.00	USD
Base Order	2517 Tires for Training	430003009	430003009	Ordered	09/03/2013	823.40	USD

Status: 45 > Complete > Document Completed > Awaiting Approval

Version Overview

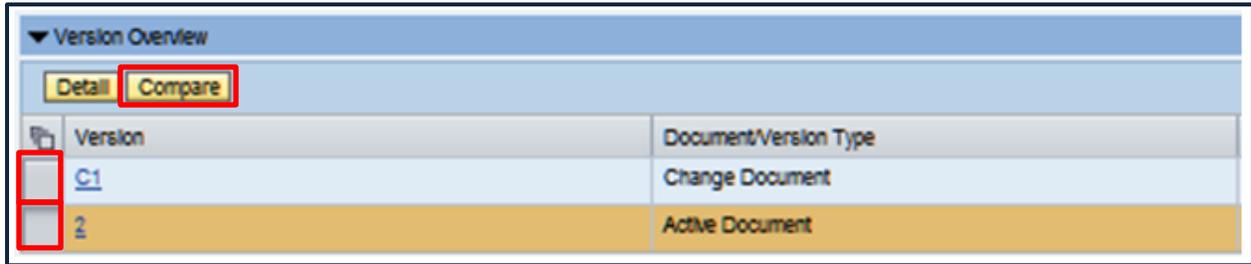
Version	Document/Version Type	Created On	Changed On	Document Name
1	Change Document	09/03/2013 11:30:36	09/03/2013 11:50:36	2517 Tires for Training
2	Active Document	09/03/2013 11:06:30	09/03/2013 11:50:01	2517 Tires for Training

Change Documents

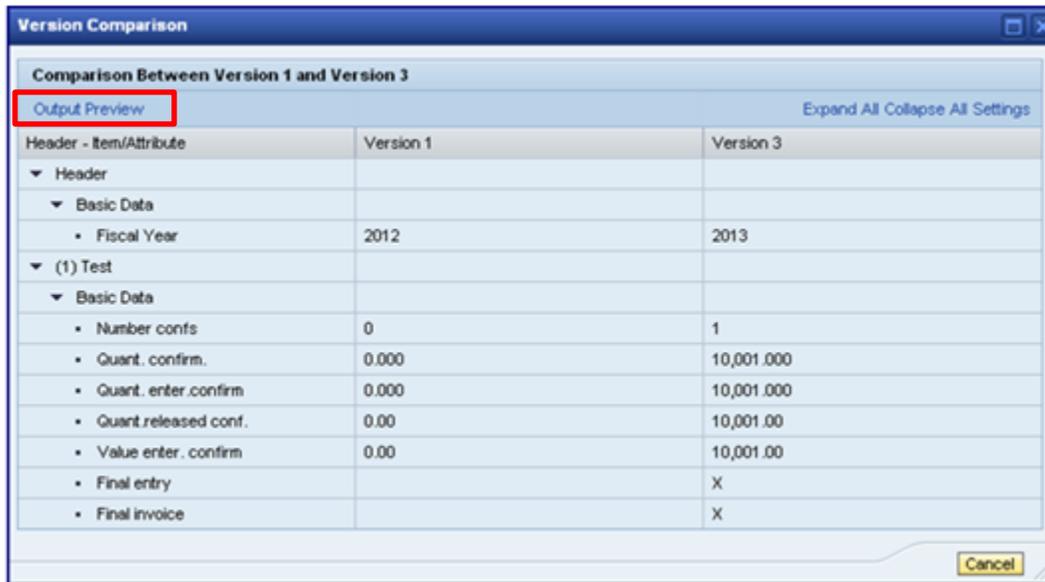
Changed Since: Changed From/To: Search

HeaderItem Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
Header						
Item Number 1 -						
Item Number 1 - 24560R18 All Season Tires						

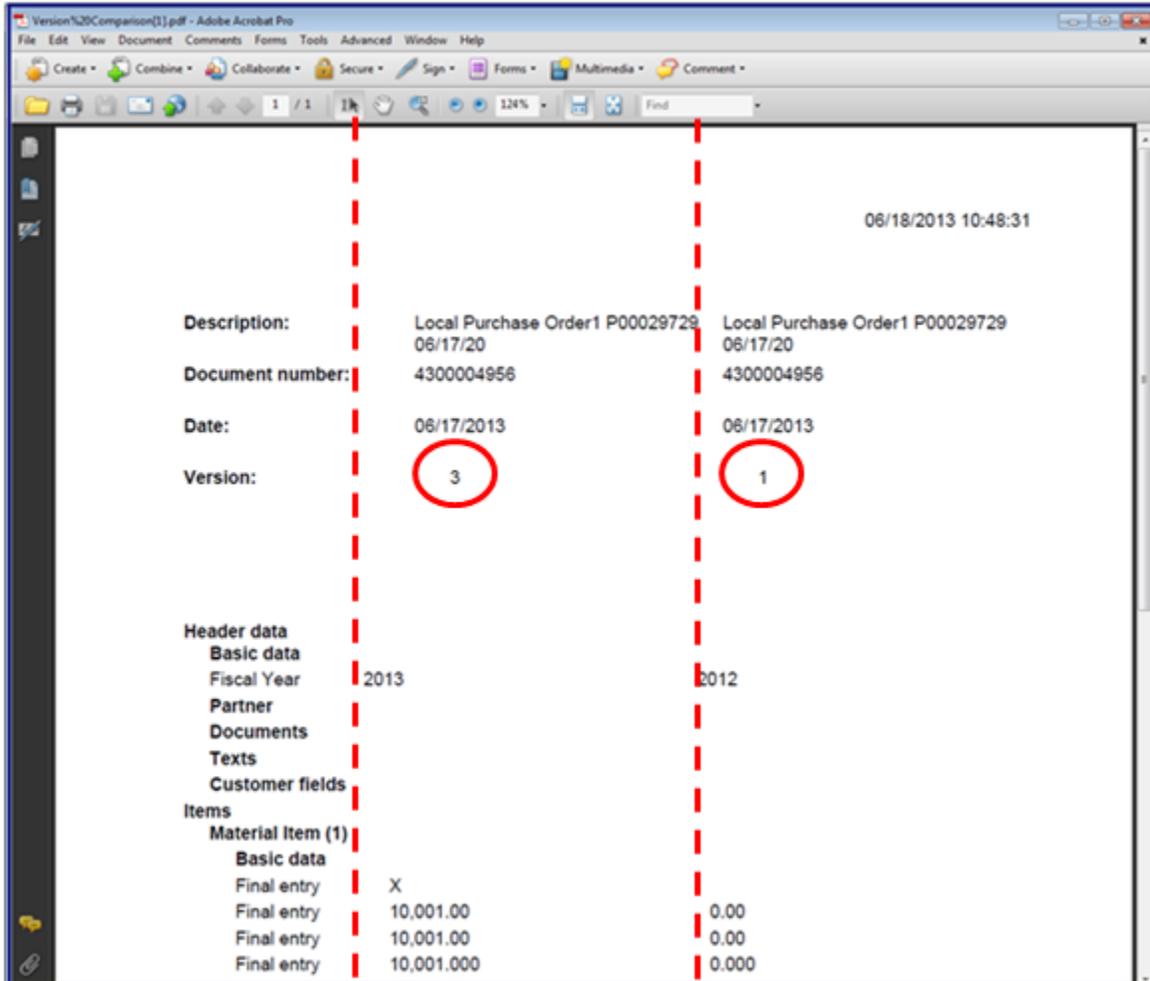
10. The COMPARE button displays all changes between two selected document versions
 - Select the gray box of the two versions to compare by holding the Ctrl button on your keyboard



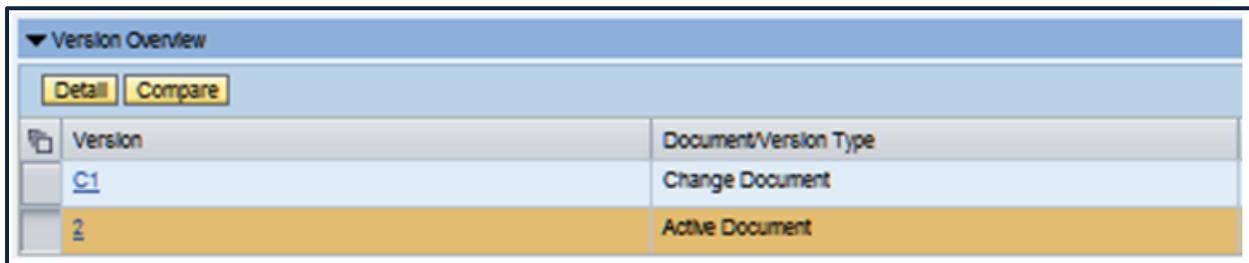
11. The Compare shows only the data that is different in both versions
 - Any changes that exist are displayed under the headings “Header” and “Item”
12. Select the OUTPUT PREVIEW button for ease in viewing the differences in versions



13. A separate window opens to display the document in a PDF format
 - Print the page(s) or view on-screen
 - The differences in each version show in a side-by-side display



14. Repeat the comparison process, if necessary, with other version combinations



15. Change Documents shows the Old Value, New Value, Changed By, Changed On, Changed At, and Version

16. It also breaks out the information by the tab or sub-tab the change is located in, as shown in the screenshot below

Header/Item Attributes	Old Value	New Value	Changed By	Changed On	Changed At	Version
Basic Data		Q06CLNT110	WF-BATCH	03/01/2013	13:25:34	2
Logical System of Logistics Backend		4300004840	WF-BATCH	03/01/2013	13:25:34	2
Follow-On Document Object ID in Back-End System		BUS2012	WF-BATCH	03/01/2013	13:25:34	2
Follow-On Document Object Type in Back-End System						
Status		X	WF-BATCH	03/01/2013	13:25:06	2
Awaiting Approval Indicator: Status Is Inactive			WF-BATCH	03/01/2013	13:25:06	2
Ordered Newly Added			WF-BATCH	03/01/2013	13:25:12	2
Change was Transmitted Newly Added			WF-BATCH	03/01/2013	13:25:34	2
In Transfer to Execution System: Indicator: Status		X	WF-BATCH	03/01/2013	13:25:34	2
Item Number 1 - LI 1 Q: CRC13022206 Expires 3...						
Basic Data		00001	WF-BATCH	03/01/2013	13:25:34	2
Follow-On Object Item in Back-End System		4300004840	WF-BATCH	03/01/2013	13:25:34	2
Follow-On Document Object ID in Back-End System		BUS2012	WF-BATCH	03/01/2013	13:25:34	2
Follow-On Document Object Type in Back-End System						

17. Document attachments needing reviewed are located on the Notes and Attachments tab

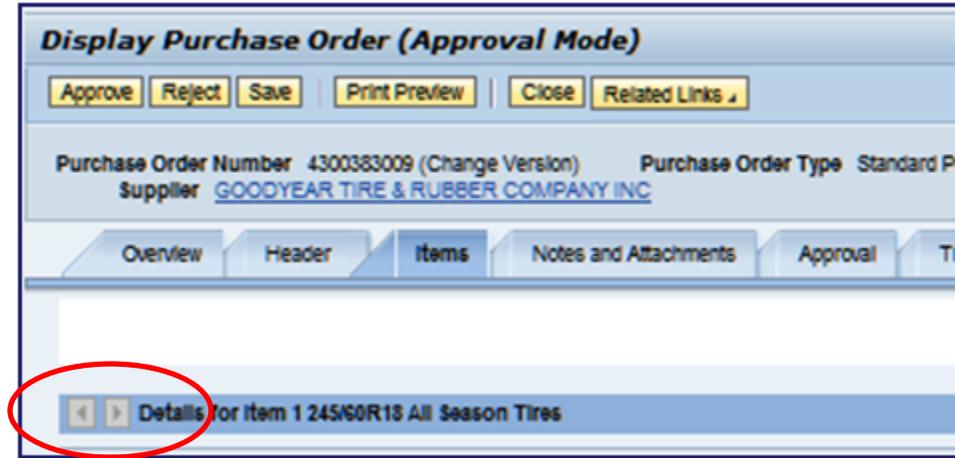
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Item01'24560R18 All Season Tires"	Item Text										
Item01'24560R18 All Season Tires"	Material PO Text										
Item01'24560R18 All Season Tires"	Standard Attachment	Sales quote for Tire PO	Sales quote for Tire PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00446500	09/03/2013

18. Each Line Item is associated with the procurement document

- Select the ITEM NUMBER or DETAILS button to review corresponding data

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date
1		Material	1	215/75R15 Radial Tires 25172500	25172500	20,000 EA	221.50	USD	1	221.50							05/21/2013
2		Material	2	225/70R17 Radial Tires 25172500	25172500	20,000 EA	247.75	USD	1	247.75							05/21/2013
		Material	0				0.00	USD	0	0.00							
		Material	0				0.00	USD	0	0.00							
		Material	0				0.00	USD	0	0.00							
		Material	0				0.00	USD	0	0.00							
		Material	0				0.00	USD	0	0.00							
		Material	0				0.00	USD	0	0.00							
		Material	0				0.00	USD	0	0.00							
		Material	0				0.00	USD	0	0.00							

21. If more than one line item exists, move to the next line by selecting the NEXT button



22. Some of the tabs that should be reviewed by different approvers are listed in the chart below

Approver	Data	SRM tab
Agency Head	Value, Supplier, Valid to/from dates	Header tab – General Data sub-tab
	Statement of Work	Header tab – Notes and Attachments sub-tab
Legal	Terms and Conditions	Header tab – Notes and Attachments sub-tab
	Attributes	Header tab – Questions sub-tab
Comptrollers	Account Assignment	Item tab – Account Assignment sub-tab for each item
	Value, Valid to/from dates	Header tab – General Data sub-tab
	Plant	Header tab – General Data sub-tab (listed as Location in SRM)
Attorney General	Terms and Conditions	Header tab – Notes and Attachments sub-tab
	Attributes	Header tab – Questions sub-tab
Treasury	Value, Valid to/from dates	Header tab – General Data sub-tab

Approving and Rejecting Documents:

After approving a document, SRM will workflow the document to the next approval level or to the final step. The final step is dependent on the type of document:

- Solicitations: Upon final approval, it is automatically visible to suppliers through the PA Supplier Portal
- Contracts: Upon final approval, Contracts must be sent to the supplier
- POs: Upon final approval (if approval is required), the fully executed PO is sent to the supplier

When rejecting a document, be sure to first record the reason for the rejection in the Header Approval Note field on the Approval tab.

Display Purchase Order

[Edit](#) | [Print Preview](#) | [Check](#) | [Close](#) | [Show my Tasks](#) | [Copy](#) | [Related Links](#)

Purchase Order Number: 4300385191 | Purchase Order Type: DGS Created PO | Status: Awaiting Approval | Document Date: 10/21/2013 | Total Value (Gross): 20,869.00 USD

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

Current Status: Active
 Current Process Step: SRM Purchase Order Approval
 Currently Processed By: Charles Anderson; Pamela Cross; Andrew Clark; Erin Vera
 Approval Process Data: [Download as XML](#)

Header Approval Note (10/21/2013 dhoffma1): Please enter a delivery date and select the correct GL for tires. (P00420119 10/21/2013 14:10:00 EST)

Header | Item

Header Approval Status

Sequence	Process Step	Status
• 001	SRM Purchase Order Approval	Approved
• 002	SRM Purchase Order Approval	Open (No Decision Made)

Approving Solicitations:

1. Access the Universal Worklist
2. Access the Solicitation needing approval by selecting the description

ZAWC-BA:15- Approve Contract no. 4400006477 \$100000.00

Universal Worklist

Tasks (67 / 67) | Alerts

Show: New and In Progress Tasks (67 / 67) | Select a Subview... | All

Subject	Status	Priority	Sent Date
ZAWC-BA:15- Approve Contract no. 4400006477 \$100000.00	New	Medium	Today
ZNB-BA:15- Approve Purchase order no. 4300005173 \$11,000.00	New	Medium	Aug 2, 2013

3. The type of Solicitation is shown in the header

Display RFX :

RFX Number 6100028309
 Smart Number DGS Pubs 5-28-14
 Type Invitation For Bid
 Status Published
 Created On 05/28/2014 13:30:07
External Version Number 1

4. View additional Partner details by selecting the gray box next to the partner then selecting the DETAILS button

Identification
 Smart Number: DGS Pubs 5-28-14
 Smart Number is External
 RFX Type: Invitation For Bid
 Bid Description: 4217 Medical Supplies/Services
 Publication Type: Public RFX

Event Parameters
 Detailed Price Information: Price with Conditions
 Follow-On Document: Contract
 Bidder Can Change RFX Responses:
 Allow Multiple RFX Responses for Each Company:

Organization
 Purchasing Organization: COPA Purchasing Organization
 Purchasing Group: DGS Administration Purchasing Group [Show Members](#)

Dates
 Start Date: 05/28/2014 15:00:00
 Submission Deadline: * 05/28/2014 15:30:00
 Opening Date: 05/28/2014 15:31:00

Change does NOT require approval:

Partners and Delivery Information

[Filter Settings](#)

Function	Number	Name	Phone Number
▪ Requester	792145	Gina Lemmon	
▪ Goods Recipient	792145	Gina Lemmon	
▪ Responsible Employee	792145	Gina Lemmon	
▪ Ship-To Address	1	EXEC BRANCH	717-787-8887
▪ Location	300438	DGS	717-787-5996

5. Access a list of changes made to the document by selecting the Change Documents on the Tracking tab

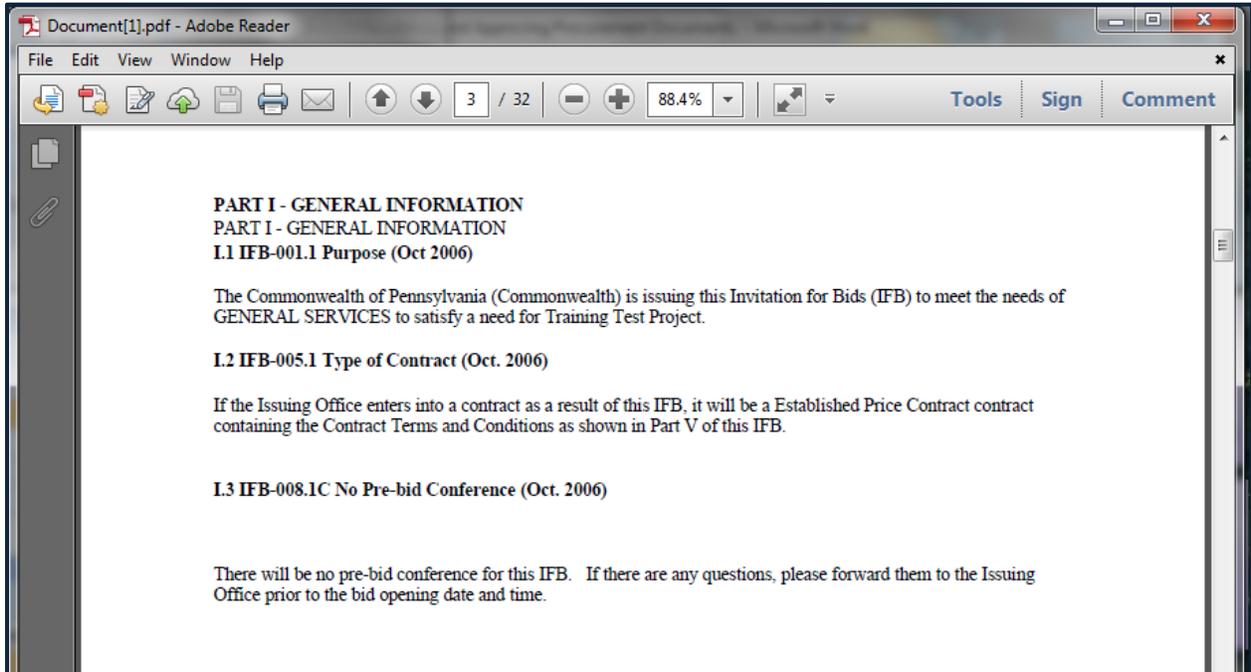
Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
▼ Change Documents						
○ Changed Since <input type="text"/> ○ Changed From/To <input type="text"/> <input type="text"/> <input type="button" value="Search"/> Expand All Collapse All Hide Query Filter Settings						
▼ Header						
▼ Basic Data						
Opening Date and Time o...	05/28/2014 04:00:00	05/28/2014 19:31:00	Gina Lemmon	05/28/2014	14:46:27	2
Time of Bid Submission D...	00:00:00	15:30:00	Gina Lemmon	05/28/2014	14:46:27	2
Time Stamp for Start Time...	05/28/2014 04:00:00	05/28/2014 19:00:00	Gina Lemmon	05/28/2014	14:46:27	2
Version Number	1		Terri Heimbach	05/28/2014	15:12:01	2
▼ Attachments						
Newly Added Terms and ...			SRMRFC	05/28/2014	14:35:26	2
Newly Added Reviewers...			SRMRFC	05/28/2014	14:35:26	2
Newly Added Response...			SRMRFC	05/28/2014	14:35:26	2
Business Document Serv...	Document	Terms and Conditions	Gina Lemmon	05/28/2014	14:46:27	2
Indicator Showing if Atta...		X	Gina Lemmon	05/28/2014	14:46:27	2
Indicator Showing if Atta...		X	Gina Lemmon	05/28/2014	14:46:27	2
▼ Partner						
Newly Added / Bidder		417970 / FIRE TECH EQU...	Terri Heimbach	05/28/2014	15:12:01	2
Newly Added / Contact P...		417972 / Cummsiskey , Te...	Terri Heimbach	05/28/2014	15:12:01	2
Newly Added / Bidder		400123 / Tops Car Wash...	Terri Heimbach	05/28/2014	15:17:38	2
Newly Added / Contact P...		400139 / Thompson , Ta...	Terri Heimbach	05/28/2014	15:17:38	2
▼ Status						
Held Indicator: Status Is I...		X	Gina Lemmon	05/28/2014	14:46:27	2
Awaiting Approval Newl...			Gina Lemmon	05/28/2014	14:46:27	2
Complete Newly Added			Gina Lemmon	05/28/2014	14:46:27	2
Incomplete Indicator: Stat...		X	Gina Lemmon	05/28/2014	14:46:27	2
RFx Ready Newly Added			Gina Lemmon	05/28/2014	14:46:27	2
Published Newly Added			Terri Heimbach	05/28/2014	14:48:39	2
Awaiting Approval Indica...		X	Terri Heimbach	05/28/2014	14:48:39	2

6. All texts and attachments are located on the Notes and Attachments tab

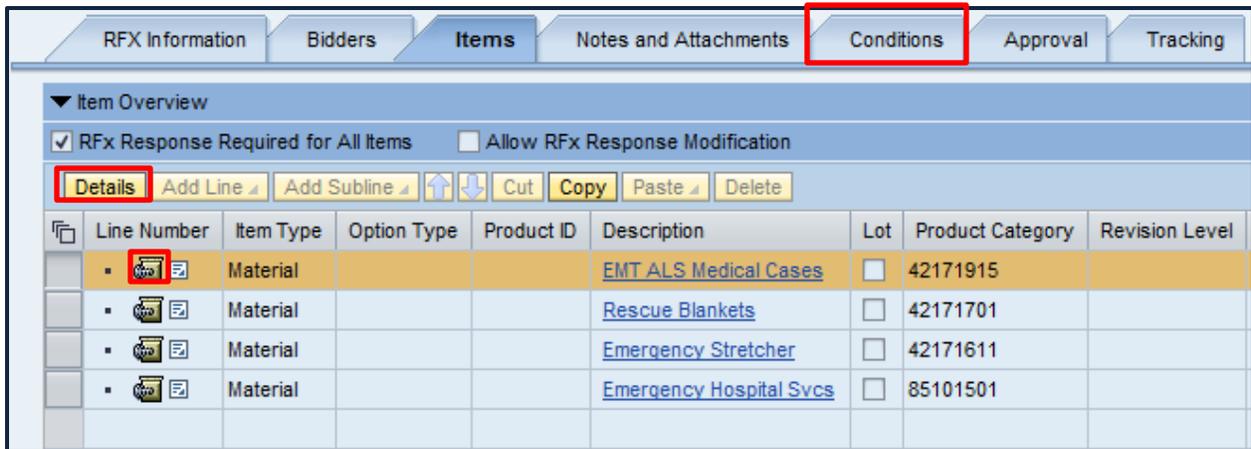
- Doc Builder documents (Terms and Conditions) should be labeled as such in the Attachments section
- Open the Terms and Conditions and review for completeness and accuracy
- Make sure the “Visible Internally Only” checkboxes are selected for the correct documents

RFX Information												
Bidders												
Items												
Notes and Attachments												
Conditions												
Approval												
Tracking												
▼ Notes												
<input type="button" value="Add"/> <input type="button" value="Clear"/> <input type="button" value="Filter Settings"/>												
Assigned To	Category	Text Preview										
Document Header	Tendering text	Our agency invites you to bid on this solicitation for m...										
Item01"EMT ALS Medical Cases"	Tendering text	Must include all items listed in the specifications.										
Item02"Rescue Blankets"	Tendering text	Must meet all thermal requirements listed in specificati...										
Item03"Emergency Stretcher"	Tendering text	Must be 300 lb weight bearing and meet all specification...										
▼ Attachments												
<input type="button" value="Add Attachment"/> <input type="button" value="Edit Description"/> <input type="button" value="Versioning"/> <input type="button" value="Delete"/> <input type="button" value="Filter Settings"/>												
Assigned To	Category	Description	File Name	Version	Processor	Visible internally only	Checked Out	Type	Size (KB)	Changed by	Changed on	
Document Header	Legal Document	Terms and Conditions	Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	88	SRMRFC	05/28/2014	
Document Header	Legal Document	Responses Report	Responses Report	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	36	SRMRFC	05/28/2014	
Document Header	Legal Document	Reviewers Check List	Reviewers Check List	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	51	SRMRFC	05/28/2014	
Document Header	Standard Attachment	Bid Specs for Emergency Medical Supplies	Bid Specs for Emergency Medical Supplies.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	18	P00446880	05/28/2014	

7. Open the attachment in a new window by selecting the document description
 - o Review each attachment thoroughly



8. Select the LINE NUMBER or DETAIL button to review corresponding data for each line item
9. Select the Conditions tab to display any conditions for the line item

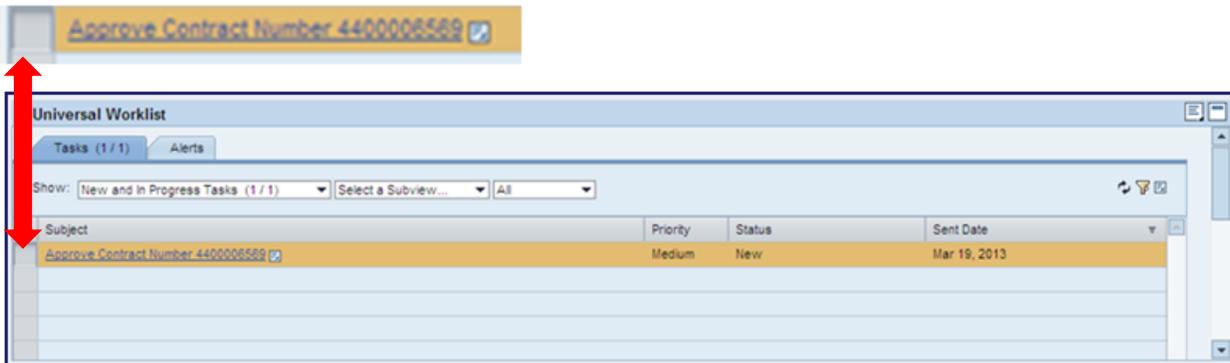


10. After reviewing the necessary data, approve or reject the Solicitation
 - To approve the Solicitation, select the APPROVE button
 - Select the REJECT button if there are errors in the Solicitation

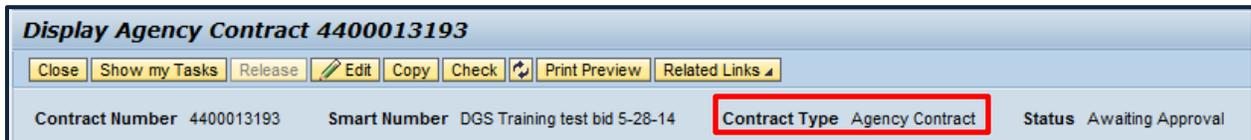


Approving Contracts:

1. Access the Universal Worklist
2. Access the Contract needing approval by selecting the description



3. The type of Contract is shown at the top of the screen



4. View additional item details by selecting the DETAILS button

Line Number	Item Category	Item Number	Product ID	Description	Product Category
1	Normal	1		EMT ALS Medical Cases	42171915
2	Normal	2		Rescue Blankets	42171701
3	Normal	3		Emergency Stretcher	42171611
4	Normal	4		Emergency Hospital Svcs	85101501

5. If changes were made to the Standard Terms and Conditions, the Non-Standard Terms and Conditions checkbox should be marked
 - If the box is not checked, reject the Contract

The screenshot shows the 'Header' tab of a contract management system. The 'Basic Data' section includes fields for Smart Number, Contract Number (4400006193), Contract Type (SW Regular Contract), and Organization (COPA Purchasing Organization). The 'Currency, Values and Pricing' section shows a target value of 50,000,000.00 USD and a release value of 155,033.28 USD. The 'Dates' section shows a valid from/to range of 11/03/2011 to 11/02/2015. The 'Non Standard Terms & Conditions' checkbox is located at the bottom right and is highlighted with a red box.

6. Access a list of changes made to the document by selecting the Change Documents on the Tracking tab

The screenshot shows the 'Tracking' tab of the contract management system. It displays a 'History' table with the following data:

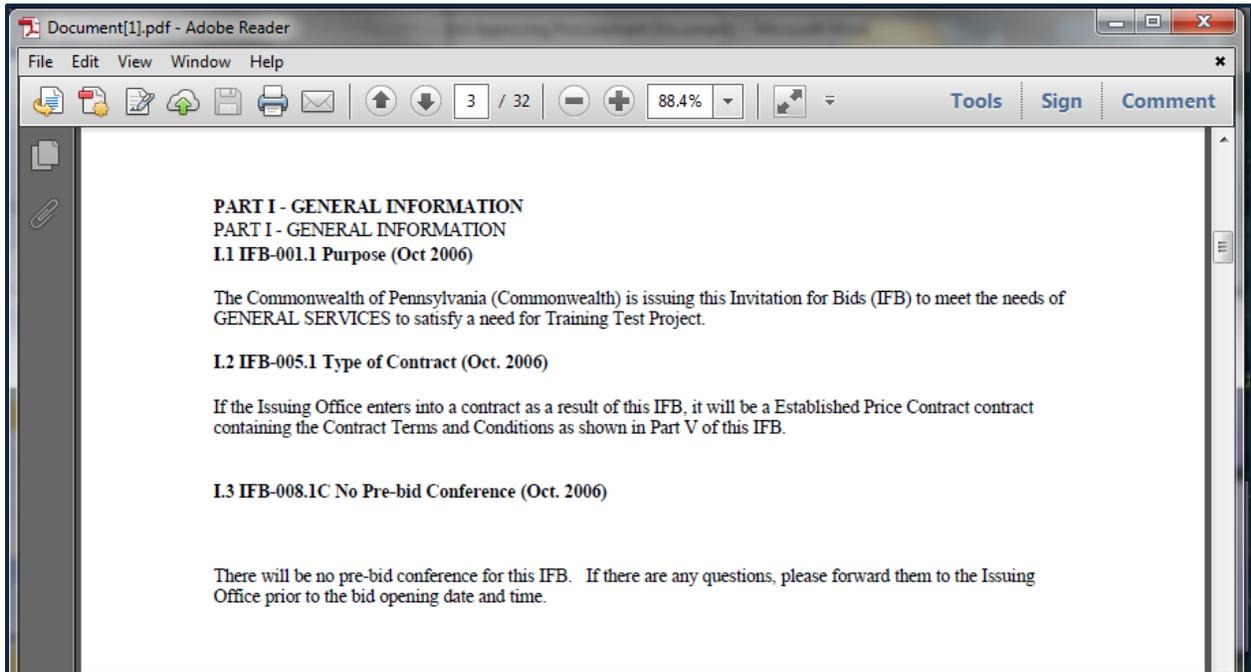
Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
RFX	DGS Training test bid 5-28-14	6100028307		Published	05/28/2014	N/A	N/A
RFX Response	DGS Training test bid 5-28-14	6500073811		Accepted	05/28/2014	0.00	USD
Central Contract	DGS Training test bid 5-28-14	4400013193		Awaiting Approval	05/29/2014	260,000.00	USD

Below the history table is the 'Change Documents' section, which is highlighted with a red box. It includes a search bar and a table with the following columns: Header/Item Attribute, Old Value, New Value, Changed By, Changed On, Changed At, and Version.

7. All texts and attachments are located on the Notes and Attachments sub-tab
 - o Review all text fields
 - o Review all attachments – select the link
 - i. Attachments will open in a separate window

Notes and Attachments											
Notes											
Assigned To	Category	Text Preview									
Document Header	Header Text	Our agency invites you to bid on this solicitation for m...									
Item01*EMT ALS Medical Cases*	Item Text	Must include all items listed in the specifications.									
Item02*Rescue Blankets*	Item Text	Must meet all thermal requirements listed in specificati...									
Item03*Emergency Stretcher*	Item Text	Must be 300 lb weight bearing and meet all specification...									
Attachments											
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Legal Document	Terms and Conditions	Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	88	SRMRFC	05/28/2014
Document Header	Legal Document	Responses Report	Responses Report	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	36	SRMRFC	05/28/2014
Document Header	Legal Document	Reviewers Check List	Reviewers Check List	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	51	SRMRFC	05/28/2014
Document Header	Standard Attachment	Bid Specs for Emergency Medical Supplies	Bid Specs for Emergency Medical Supplies.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	18	P00446880	05/28/2014

8. Review each attachment thoroughly
 - o If the information in the attachments is incorrect, the document should be rejected and the reason noted in the Header Approval Note on the Approval tab



9. Select the ITEM NUMBER or DETAIL button to review corresponding data for each line item
10. Select the Conditions tab to display the conditions for the line item

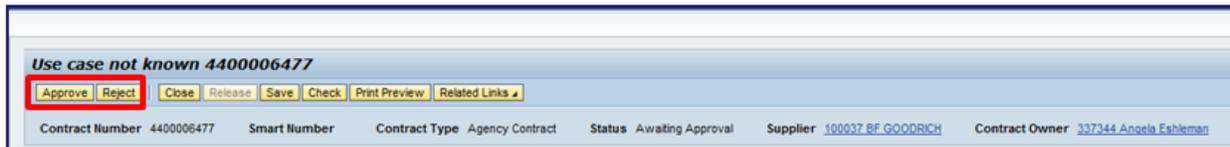
Line Number	Item Category	Option Type	Item Number	Product ID	Description	Product Category
1	Normal		1		EMT ALS Medical Cases	42171915
2	Normal		2		Rescue Blankets	42171701
3	Normal		3		Emergency Stretcher	42171611
4	Normal		4		Emergency Hospital Svcs	85101501

Note: DGS Approvers may need to approve Hierarchical Contracts. These Contracts do not need approval at both the child and parent level – they are approved at the parent level only.

- Changing a Child Contract associated with a multi-award Hierarchical Contract triggers the approval workflow so that the Parent Contract can be re-released
- Changing a Child Contract associated with a distributor/reseller Hierarchical Contract does not trigger the approval workflow, the Parent Contract is not re-released

All Hierarchical Contracts requiring Treasury approval must have the Child Contract numbers recorded in the Header Approval Note field on the Approval tab.

11. After reviewing the necessary data, approve or reject the Contract
 - To approve the Contract, select the APPROVE button
 - Select the REJECT button if there are errors in the Contract

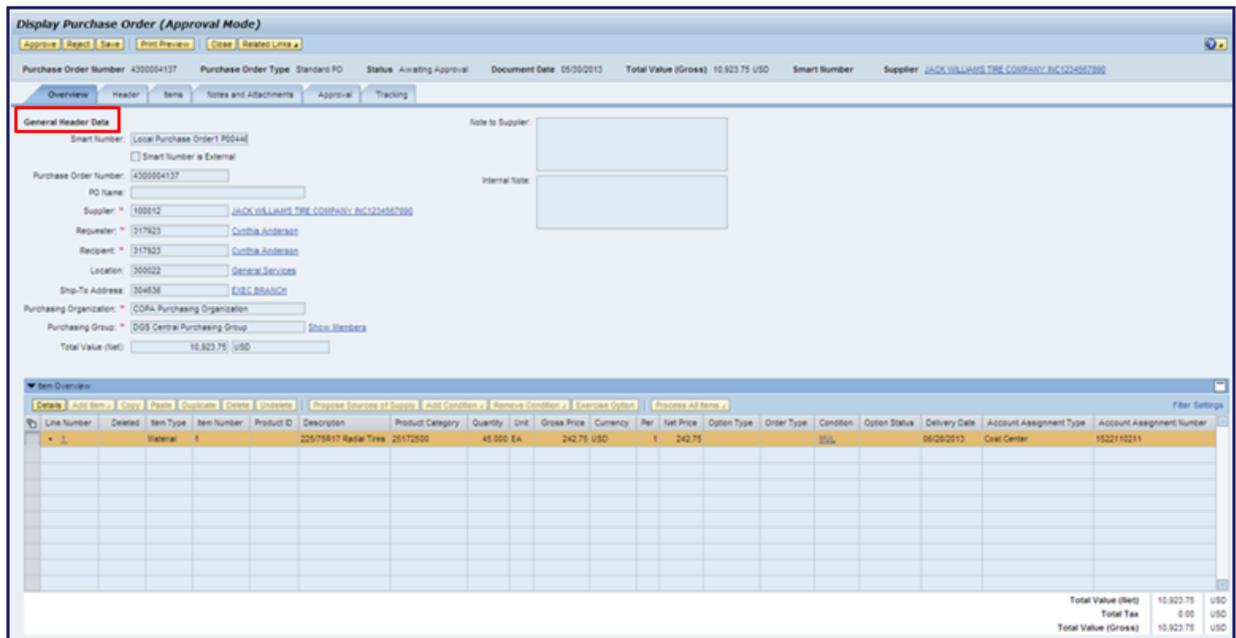


Approving POs:

1. Access the Universal Worklist
2. Access the PO needing approval by selecting the description



3. The PO's General Header Data information on the Overview tab is displayed



4. Review all information on the Item tab – General Data sub-tab to ensure that it is correct
 - Approvers cannot edit any data

The screenshot shows the SAP Item Details screen. The top navigation bar has tabs for Overview, Header, Item, Notes and Attachments, Approval, and Tracking. The 'Item' tab is selected and highlighted with a red box. Below the navigation bar, there are sub-tabs: General Data, Prices and Conditions, Account Assignment, Notes and Attachments, Approval Preview, Related Documents, Extended PO History, and Payment. The 'General Data' sub-tab is selected and highlighted with a red box. The main form area is titled 'Basic' and contains several sections: Identification (Item Number, Item Type, Product ID, Description, Product Category, Contract Item), Currency, Values and Pricing (Quantity/Unit, Gross Price/Per, Net Value, Net Price, Tax Code/Amount), Service and Delivery (Delivery Date, Underdelivery/Overdelivery Tolerance, Storage Location), and Status and Statistics (Item Deleted, Closed Status, Cancelled).

5. Review all information on the Header tab – General Data sub-tab to ensure that it is correct
 - If there were changes to the Standard Terms & Conditions, be certain that the Non-Standard Terms & Conditions checkbox is checked
 - If the box is not checked, reject the PO

The screenshot shows the SAP Header Details screen. The top navigation bar has tabs for Overview, Header, Item, Notes and Attachments, Approval, and Tracking. The 'Header' tab is selected and highlighted with a red box. Below the navigation bar, there are sub-tabs: General Data, Notes and Attachment, and Output. The 'General Data' sub-tab is selected and highlighted with a red box. The main form area is titled 'Basic' and contains several sections: Identification (Smart Number, Smart Number is External, New Serial Part for Smart Number), Purchase Order Number (Purchase Order Number, PO Name, Purchase Order Type), Corresponding Invoice Purchase Order, Organization (Purchasing Organization, Purchasing Group), Currency, Values and Pricing (Total Value (Net), Total Value (Gross), Tax Value), Service and Delivery (Commitment Documents), and Status and Statistics (Document Date, FM Posting Date, Posting Period, Cancelled, Closed Status, Validity Start Date, Validity End Date). A red box highlights the 'Non Standard Terms & Conditions' checkbox in the Identification section.

6. Continue to review the information in each of the Header sub-tabs
 - o The Notes and Attachments sub-tab contains the attachments

The screenshot shows the 'Notes and Attachment' sub-tab selected. The interface includes the following sections:

- General Data:** Overview, **Header** (selected), Items, Notes and Attachments, Approval, Tracking.
- General Data:** General Data, **Notes and Attachment** (highlighted), Output, Document Totals, Extended PO History, Payment, User-Specified Status.
- Basic:** Identification, Currency, Values and Pricing, Service and Delivery, Status and Statistics.
- Organization:** Purchasing Organization, Purchasing Group.
- Partner:** Details, Add, Send E-Mail, Call, Clear. Filter Settings.

Function	Number	Name	Phone Number
Requester	703389	Cynthia Anderson	
Vendor	161302	GOODYEAR TIRE & RUBBER COMPANY INC	717-763-7557
Goods Recipient	703389	Cynthia Anderson	
Ship-To Address	1	EXEC BRANCH	717-787-4719
Location	301375	DGS Bureau of Procurement	717-787-2199

7. All text and attachments are located on the Notes and Attachments sub-tab

The screenshot shows the 'Notes and Attachments' sub-tab. The interface includes the following sections:

- Notes:** Clear, Filter Settings. List of notes with categories and descriptions.
- Attachments:** Add Attachment, Edit Description, Versioning, Delete, Create Profile, Filter Settings. Table of attachments.

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Header Text	Contact Cynthia Anderson @ 717-214-3445									
Internal Note	Justification: Tires are needed to replenish DGS Garage...									
Header Vendor's Remarks	-Empty-									
Bond Information	-Empty-									
Confidential Terms of Payment	-Empty-									
Encumbrance Information	-Empty-									
Standard Attachment	Sales quote for Tire PO		0		<input checked="" type="checkbox"/>	<input type="checkbox"/>		0		

8. Open the attachment in a new window by selecting the document description
 - o Review each attachment thoroughly

QUOTE

Goodyear Tire *[Company Slogan]*

Goodyear Tire
 123 Test Ave, HBG PA 17110
 717 234 1000 717 234 1010
 Tires@goodyear.com

DATE: JUNE 11, 2013
 INVOICE # 123654
 EXPIRATION DATE August 11, 2013

TO Cynthia Anderson
 Dept of General Services
 555 Walnut St., 6th Fl., Forum Place
 Harrisburg, PA 17101
 717-214-3445
 Customer ID 9876

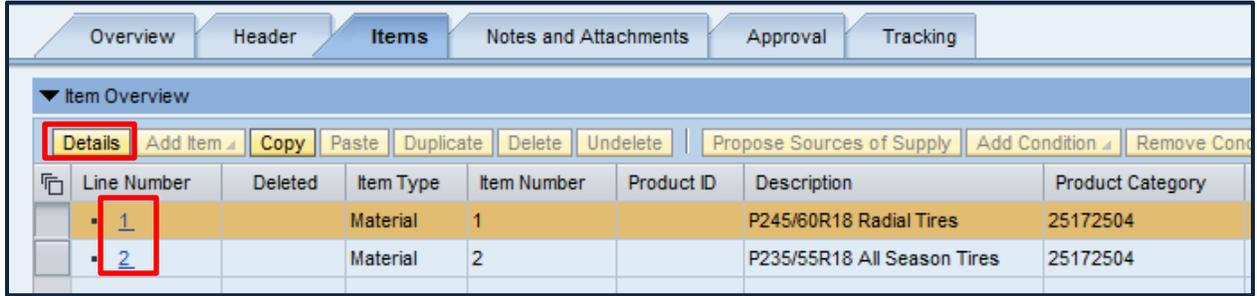
SALESPERSON	JOB	SHIPPING METHOD	SHIPPING TERMS	DELIVERY DATE	PAYMENT TERMS	DUE DATE
John Doe	DGS Garage	BEST	FOB Dest	7/17/13	Due on receipt	

QTY	ITEM #	DESCRIPTION	UNIT PRICE	DISCOUNT	LINE TOTAL
100	225/75R17	Steel Belted Radial	242.85		24,285.00

9. The Related Documents tab provides a history of the PO's activity
 - o Display SRM Documents directly from the PO by selecting the document number link

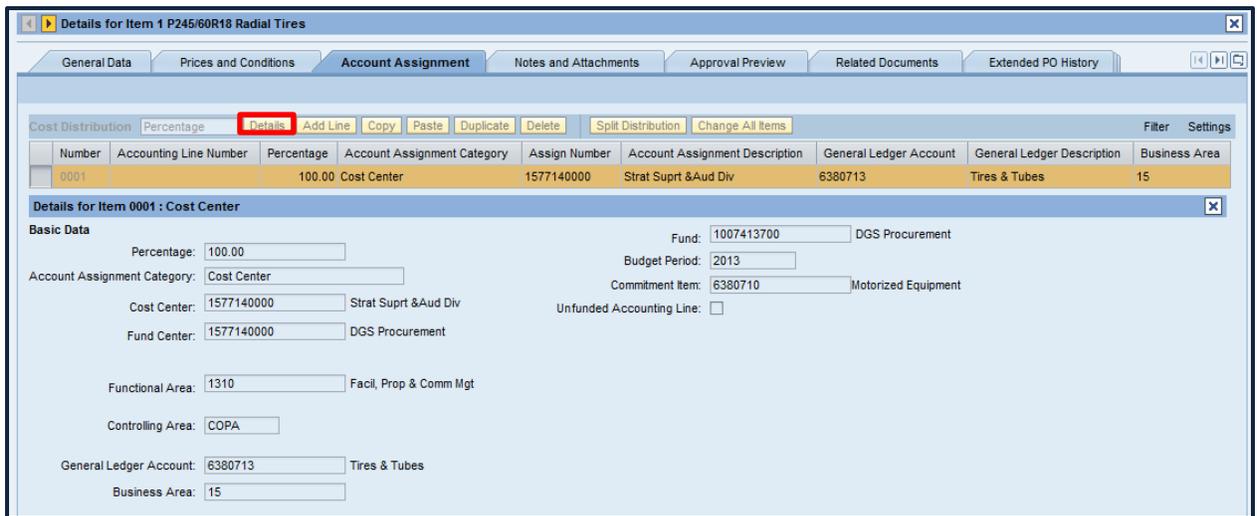
Document	Name	Document Number	Back-End Document Number	Status	Date	Quantity	Unit	Value	Currency
Shopping Cart	225/75R17 Radial Tires	100147211		Follow-on Document Created	05/30/2013	45.000	EA	10,923.75	USD
	Total					45.000	EA	10,923.75	USD
Purchase Order	225/75R17 Radial Tires	43000041371	43000041371	Ordered	05/30/2013	45.000	EA	10,923.75	USD
	Total					45.000	EA	10,923.75	USD
Confirmation			20135000012054/1		06/04/2013	25.000	EA	6,068.75	USD
Cancellation			20135000012055/1		06/04/2013	25.000	EA	6,068.75	USD
	Total					0.000	EA	0.00	USD

10. Select the ITEM NUMBER or DETAIL button to review corresponding data for each line item

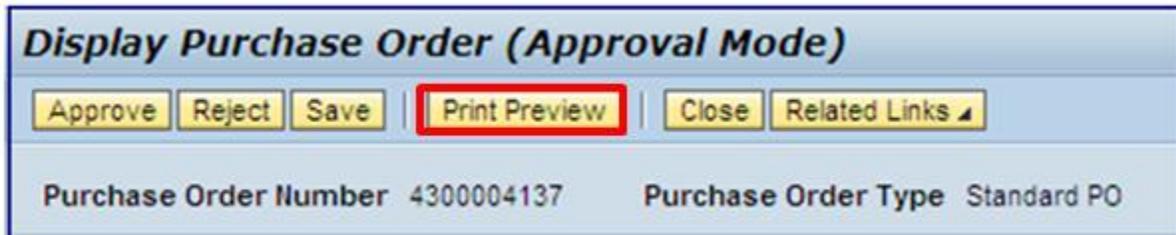


11. Select the Account Assignment tab to view Account Assignment Category (i.e. Cost Center, Grant Internal Order, etc.), Fund, and General Ledger information

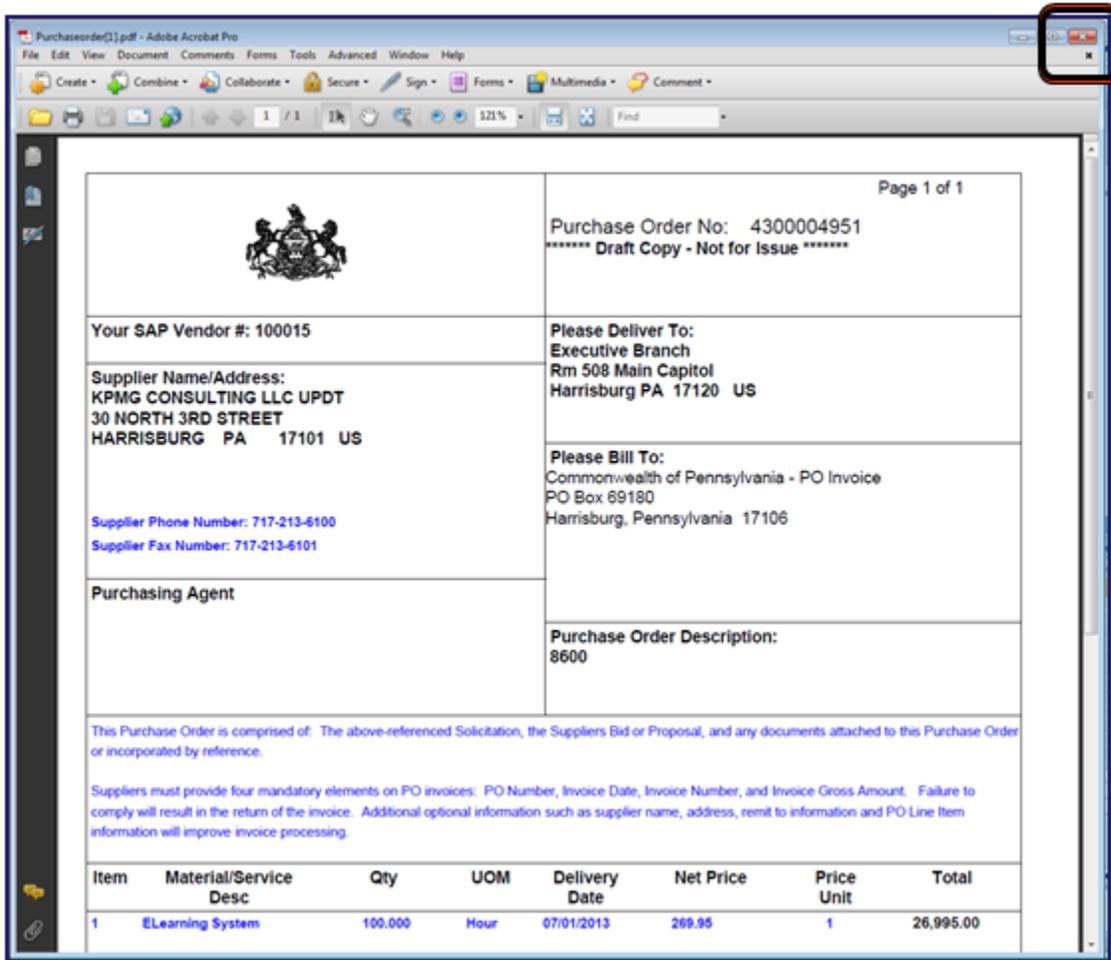
- o Select the DETAILS button to view the Account Assignment details



12. Select the PRINT PREVIEW button to display the PO document in a separate window



13. Select the red "X" to close the window



14. After reviewing the necessary data, approve or reject the PO

- To approve the PO select the APPROVE button
- Select the REJECT button if there are errors in the PO

