

HOW TO APPROVE/REJECT A REQUISITION & PURCHASE ORDER - QUICK GUIDE

JUMP TO SEARCH

BPO	Blanket Purchase Order
BPO2W	Blanket Purchase Order – 2-Way Match
BUDST	Budget Structure
BUDSTS	Budget Structure Summary
BUDTAM	Budget Tracking Amounts
CNTAC	Contact
COMM	Commodity
COMMCAT	Commodity Category
IWF09	Approval Log
IWF10	Approval Processing Log
PLOC	Procurement Location
PO	Purchase Order
PO1	Purchase Order – No Match
PO2W	Purchase Order 2-Way Match
PO3W	Purchase Order – 3-Way Match
POPH	PO Print History Page
PRCUDOC	Procurement Document
PRNACTN	Document Print Action
XPO	Purchase Order
XREQ	Requisition
RQWRKB	Requisition Workbench – Source to PO
XSRQ	Stock Requisition

SECTION NO. 1 - HOW TO APPROVE/DENY REQUISITIONS AND PURCHASE ORDER

QUICK GUIDE

Approval Worklist

FIN 120 Requisition Approval v1.0

Visit the Best Project Customer Resource Center for current manuals

<http://best-lms.lacoe.edu/>

Steps

A. Open the Approval Worklist

1. On the Secondary Navigation Panel, click **Message Center**.

The screenshot shows the 'BEST Financial - Training' interface. On the left is a 'Message Center' sidebar with options: Inbox, Alerts, Broadcasts, Worklist (highlighted with a red arrow), Forms, and Collaboration. Below these are 'Search', 'History', 'Favorites', and 'Administration' sections. The main area is titled 'Worklist' and contains a 'Select Worklist' dropdown menu set to 'DISTRICT APPR'. Below this are fields for Level, Code, District/Agency, ID, Submitter ID, Escalated Item, School Loc/Dept, Create Date, and Creator ID. There are 'Browse' and 'Clear' links. Below the form is a table with columns: Level, Code, District/Agency, ID, Priority, Escalated Item, Comments, Creator ID, Submitter ID, Date, and Reason. The table contains three rows of data, all with 'Normal' priority and 'No' escalated items.

Level	Code	District/Agency	ID	Priority	Escalated Item	Comments	Creator ID	Submitter ID	Date	Reason
1	XREQ	75713	190000000116	Normal	No	No	KUSER	KUSER	12/26/2018 6:05:10 PM	Apply approval
1	XREQ	75713	190000000090	Normal	No	No	KUSER	KUSER	12/26/2018 3:17:12 PM	Apply approval
1	XREQ	75713	190000000116	Normal	No	No	KUSER	KUSER	12/26/2018 6:06:00 PM	Apply approval

2. Click **Worklist**. From the **Select Worklist** drop-down list, select the appropriate worklist.
 3. Search for the document to be approved. There are several fields to search on, i.e.:
 - a) Enter Code XREQ for all Requisitions pending approval (workflow #1)
 - b) Enter Code PO* for all Purchasing Orders pending approval (workflow #2)
 4. Click the **Browse** link to display the filtered list of documents.
 5. From the list of documents, check the check box for the document you want to approve.
 6. Click the **Take Task** link. This removes the document from the Role Worklist and places it in your personal worklist.
 7. Click on Change Worklist Role Order, then from the **Select Worklist** drop-down list, select your Personal Worklist.
 8. Verify the selected document displays in the grid.
 9. In the **ID** column, click the link to open the document.
 10. Review the document to see if it meets approval criteria. If it does, click the **Approve** button. The "Approve action completed" message is displayed at the top of the page.
- B. If desired, view the status of the document on the Track Work in Progress page.
- a) At the bottom right of the document, click the Workflow button and then click **Track Work in Progress**.
 - b) To view previous workflow actions (if any), click the **View Log** link to display the Track Work in Progress Log.
 - c) Click the **Back** link in the upper right corner of the screen to return to the document.
13. Verify that the approval applied successfully, and the document is either in Final, or is pending a subsequent level of approval.
- Click **Close** to close the document.

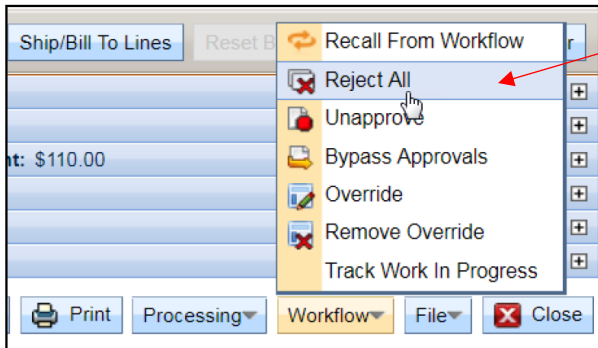
WORKLIST PAGE LINKS

- **First Previous Next Last** – Used to navigate the list of documents to approve
- **Approve** – Used to approve a document (in a Personal Worklist)
- **Reject** – Used to reject a document (in a Personal Worklist)
- **Take Task** – Used to move the selected document(s) from a Role Worklist to a Personal Worklist
- **Return Task** – Used to return a selected document from a Personal Worklist to the Role Worklist where it may again be accessed by all users belonging to the same Role Worklist
- **Change Priority** – Used to change the priority of a selected document. You may also record a brief note about this document to be viewable to other members of the role worklist.
- **Refresh** – Used to refresh the worklist at any time
- **Menu** – Displays the page menu to access Page Help, and Add To Favorites

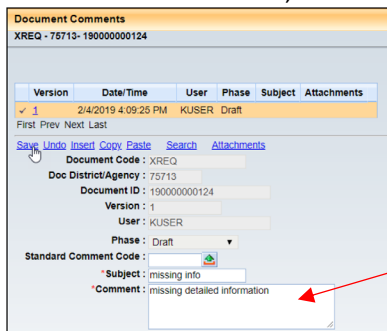
Steps

B. How to reject a document.

1. On the Secondary Navigation Panel, click **Message Center**.
2. Click **Worklist** to open the Worklist page.
3. From the **Select Worklist** drop-down list, select the appropriate Role Worklist.
4. Search for the document to be approved. You can search by Code, Dept, or ID.
5. Click the **Browse** link to display the filtered list of documents.
6. From the list of documents, check the check box for the documents you want to reject.
7. Click the **Take Task** link. The document has now been removed from the Role Worklist and is placed in your Personal Worklist.
8. From the **Select Worklist** drop-down list, select your personal worklist.
9. In the **ID** column, click the link to open the document.
10. In the bottom right corner of the screen, click the **Workflow** button, and then click **Reject All**.



11. Insert reason for rejecting the Req. Go to the **Document Comments** page and a message at the top of the page indicates the document has been rejected.
12. Click the **Insert** link to add a comment.
13. In the **Subject** field, enter **Rejected**.
14. In the **Comment** field, enter an explanation for the rejection.



15. Click the **Save** link.
16. Click the **Back** link. You are returned to the document. The comment icon is displayed on the title bar to the right of the document Phase, indicating that this document has a comment.
17. Click the **Close** button to close the document and return to the Worklist page.

END OF SECTION