Purchase Order Workflow Processing
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PO Workflow Processing
The following diagram gives an overview of the PO Workflow Processing steps.

Create a Purchase Order
You can create a Purchase Order in one of the following two forms:

- PO Pending Purchase Orders
- PM Purchase Orders

For more information on the PM Purchase Orders form, refer to the Help topic “PM Purchase Orders” in the V6 software.

- POs created using PM Purchase Orders that have a workflow applied to them cannot be interfaced until they are approved.
- Once the Workflow Status is Approved, the “Approved” box on the Info tab is enabled and the PO can be interfaced using PM Interface.
- Remember to also check the “Send” box on the Non-interfaced Items tab.
- The Workflow and Submit for Approval buttons function the same as they do on the PO Pending Purchase Orders form, as does the Workflow History tab.

Use the following instructions to create a PO in the PO Pending Purchase Orders form.

1. From the Purchase Order module’s Programs folder, open the PO Pending Purchase Orders form.

2. Use the upper portion of the Info tab to enter general PO information. For help with field definitions, click in the field and press F1.

3. Use the lower portion of the Info tab to create PO items with details. For help with field definitions, click in the field and press F1.

4. Save the record. The system will determine if spending limits have been exceeded and the Workflow Status will update in the bottom left corner.

5. To see the workflow that applies to each PO item and the reviewers/approvers in the workflow, click the Workflow button. You can also enter Comments for the reviewers/approvers in this form.

Note: the Workflow button is only enabled when the PO must be approved.
Submit a Purchase Order

Workflow Status: Approval Not Required

1. If the Workflow Status displays Approval Not Required, click the Process button. You will be prompted to create a new batch or add the PO to an existing batch.

2. Make your batch selection and click OK.

3. Click the Validate button.

4. If there are no errors, click the Post button. The PO will post as a PO Entry batch.

Workflow Status: Approval Required

1. If the Workflow Status displays Approval Required, click the Submit for Approval button.

2. The reviewer will receive a message that the PO is ready to be reviewed.

Once the PO has been submitted for approval, you can view its progress in several ways:

- **Workflow button** - Click the Workflow button on the form that was used to create the PO - for example the PM Purchase Orders or PO Pending Purchase Orders form. This will launch the PO Workflow Item Reviewers / PO Pending Reviewers form, which displays the progress of the PO in the workflow process and any comments that have been entered.

- **Work Center** - Open the My Documents in Workflow query in the Work Center that you use to process purchase orders. This displays a list of purchase orders that you have created, and their progress in a workflow.

- **Workflow History tab** - Comments display on the Workflow History tab on the form used to create the PO, for example the PM Purchase Orders or PO Pending Purchase Orders form. This tab displays the history of the PO, for example the comments entered by reviewers/approvers, when it was submitted for approval, and when it was approved/rejected.

You can make changes to the PO after it has been submitted, but changing the PO items will remove the PO from the workflow process. Once you have made your changes, click the Submit for Approval button to resubmit it for review/approval.

If the PO has already been approved, the status of the PO will be Approved and changes will no longer be allowed.

Review/Approve the PO

This step is performed by a reviewer/approver on the workflow that applies to the PO.

1. Open the Work Center that you use to review/approve purchase orders.

2. Open the My Documents to Review option in the Work Center menu. A list of POs that you need to approve/review will display. This is a list of POs, not PO items.
3. Select from the following actions:

**View the PO Items** - Double click on a PO to drill down and view the PO items. To return to the list of purchase orders, click the icon.

**Open/Edit a purchase order** - When you edit the items on a PO, you take ownership of the PO and become its originator. This means that you are pulling the PO out of the current work flow. If the PO needs to be processed in a workflow after you make the changes, you will have to submit the PO for approval just like if you were the one that originally created the PO.

- To open or edit a PO/PO item, select it in the list and click the icon. This will open the PO in the form that was used to create it. For example if the PO was entered using the PO Pending Purchase Orders form, the PO will open in that form.

**NOTE:** You cannot edit purchase orders that have been fully approved.

**Approve a purchase order** - When you approve a PO, you approve all of the PO items where you are set up as a reviewer/approver. This means that you cannot approve/reject specific items on the PO.

- From the My Documents to Review inquiry, select a PO that needs to be approved and click the Approve Document icon. This will approve all of the PO items on the purchase order where you are set up as an approver.
- When viewing PO Items clicking the Approve Document icon will approve all of the items on the PO where you are set up are a reviewer/approver, not just the selected PO item.

**PO / PO Items - What if there are more approvers/reviewers in the workflow?** - If the PO / PO item needs to be approved by more users before it can be processed, the PO /PO item is only partially approved when you approve it.

- You can see this by opening the PO /PO item in the form that was used to create it, and then clicking on the Workflow button. This will open the Workflow Item Reviewers form, which displays the approvers that still need to review/approve it.

**Reject a PO** - When you reject a PO, you reject the entire PO, not just the PO items where you are set up as a reviewer/approver. This means you cannot reject specific items on a PO. If any portion of the PO is rejected, the originator of the PO receives a message that the PO has been rejected and the entire PO is pulled out of the workflow process.

- From the Workflow Document Review, select a PO that needs to be rejected and click the Document icon. This will reject all of the PO items on the purchase order, and the user that created the PO will receive a message that the PO has been rejected.

When viewing PO Items clicking the Document icon will reject the entire PO, not just the selected PO item. This means the entire PO will be sent back to the originator.
Add a comment - Add comments to a PO item. These comments can be viewed by other approvers/reviewers, and the originator of the PO.

- To add a comment, double click on a PO in the My Documents to Review query in the Work Center, and then select a PO item and click the Add Comments ( ) icon. This will open the WF Document Review Edit form.
  - **Comments** - Use the Comments field to enter your comments. This information is associated with a specific reviewer/approver and PO item, and it can be viewed in several ways.
  - **Notes** - The text entered in the Notes field only displays on this form and cannot be viewed by other approvers/reviewers, or the originator of the PO.

Add an attachment - You can add attachments to PO items directly from a Work Center.

- From the My Documents to Review query, double click on a PO and then select a PO item that displays. Click on the Attachments ( ) icon at the top of the grid to add an attachment to the selected PO item.

  If a reviewer adds an attachment to a PO item/reviewer but then makes a change to the PO item, the reviewer/approver takes ownership of the PO and the workflow changes. This means that the PO item/approver record that the attachment was associated with no longer exists. In this case, the selection in the Retain attachments after record delete box on the DM Attachment Options form determines what happens to the attachment.

  - If this box is checked, the attachment will become a stand alone attachment. You can view the attachment in the DM Attachment Index Search form when the Stand Alone filter box checked.
  - If this box is not checked, the attachment will be deleted.

  4. When the purchase order has been fully approved, it is ready to be processed.

Process the PO

Once the PO has been approved, it can be processed. This will put the pending PO in a PO Purchase Order Entry batch and post the PO.

1. Open the approved PO in the PO Pending Purchase Orders form.

2. Verify that Approved displays in the Workflow Status field at the bottom of the form.

3. Click the Process button. This will open the Batch Selection form.

4. Use the Batch Selection form to process the PO in an existing PO Purchase Order Entry batch, or create a new batch.

5. Once a batch has been selected, the PO Batch Process form will display.

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**TIP:** You can exit this form if you do not want to post the batch. For example you can add multiple POs to a single batch, and then validate and post them all at once.

6. Validate the batch, preview/print the batch reports, and then post the batch.

**NOTE:** If there are errors in the batch, you can fix them by opening the batch using the PO Purchase Order Entry form.

7. After the PO has been processed, you cannot change it using the PO Pending Change Orders form. You would now change it as you would any other PO.