DFA Arkansas Department of Finance & Administration
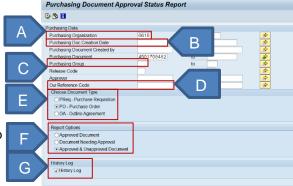
ZMM8_EXTN
Purchase Order/Outline Agreement Approval Status Report

Purpose: Use this job aid to generate a report for monitoring the approval status of a purchase order (PO) or outline agreement (OA).

1. Go to transaction code **ZMM8_EXTN**.

2. Complete the following fields or checkboxes:

3. **Purchasing Organization** – same as agency business area

a. **Purchasing Doc Creation Date –** date or range of dates the document line(s) was created

b. **Purchasing Group –** code represents a buyer or group of buyers responsible for an agency's purchasing activities. This field generates purchase documents which contain undeleted line items with the desired purchase group.
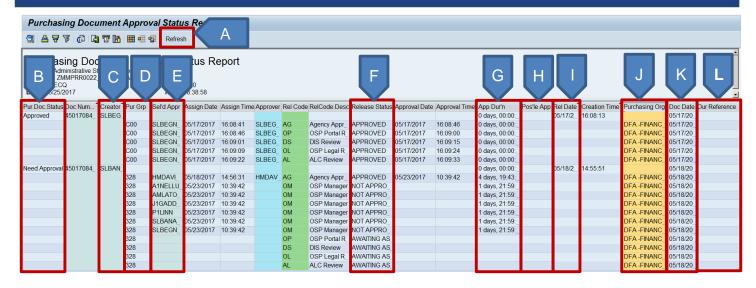
d. **Our Reference Code** – code represents the method of procurement. This field is applicable to PO and OA documents only.

e. **Document Type –** Select the type of purchasing document to display on the report (PO or OA). Only one document type radio button can be selected.

f. **Report Options –**
   i. **Approved Document** displays purchasing documents that have all of the required approvals needed for the particular procurement scenario.

   ii. **Document Needing Approval** displays purchasing documents with at least one outstanding required approval for the particular procurement scenario.

   iii. **Approved & Unapproved Document** displays all purchasing documents correlating to the search criteria requested.

g. **History Log –** when checked, will include approval data for the life of the purchasing documents, including new release strategy assignments. If not checked, displays only most recent release strategy approvals.

NOTE: Use additional selection criteria as needed. The **Our Reference Code** field is only applicable to PO and OA document types.

h. Click the **Execute** button.

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A. **Refresh** button – updates data with any changes since the initial report execution.
B. **Purchase Document Status** identifies the status of the whole purchasing document.
- **Approved** indicates all necessary document approval levels have been completed.
- **Need Approval** indicates all necessary document approval levels that have not been completed.
C. **Creator** always displays the AASIS ID of the person who <u>initially created</u> the purchasing document.
D. **Purchasing Group** displays the assignment of the document.
E. **Selected Approver** lists all users that have been assigned the Approval Task for that release code. These users will have received notification that approval is needed.
F. **Status** identifies the status of the release codes' particular authorization level.
- **Approved** indicates the document was approved for that particular authorization level.
- **Awaiting Assignment** indicates the previous workflow has not been completed. Upon completion, AASIS automatically routes the workflow for the next approver needed.
- **Cancelled** indicates the workflow was cancelled at the <u>previous</u> release code level. The level that was actually cancelled will display in "Not Approved" status.
- **No Approver Found** indicates no users were assigned an approval task at that authorization level.
- **Not Approved** indicates approval workflow has been assigned but is not complete.
- **Rejected** indicates an approver has rejected the purchasing document approval and all existing workflow has been cancelled for that document. If changes follow, a new release strategy may be assigned if the change affects the material group, total value or total projected cost of the purchasing document.
G. **Approval Duration** displays the total time from assignment through approval for a particular approver.
H. **Possible Approvers** displays users that may be selected as an approver by the purchasing document creator. This column is only applicable for the first release of the purchasing document.
I. **Release Creation Date** identifies the date the latest release strategy was assigned. This date will change each time a new release strategy is created for the document.
J. **Purchasing Org.** displays the name of the purchasing organization.
K. **Document Creation Date** always identifies the date the original purchasing document was created.
L. **Our Reference** displays the procurement method assigned to the purchasing document (PO and OA only).