

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

The screenshot shows the 'Purchasing Document Approval Status Report' form. Callout boxes A through G point to the following fields:

- A:** Purchasing Organization (0610)
- B:** Purchasing Doc Creation Date
- C:** Purchasing Document Created by (4501708482)
- D:** Our Reference Code
- E:** Choose Document Type (Radio buttons for PRReq - Purchase Requisition, PO - Purchase Order, OA - Outline Agreement)
- F:** Report Options (Radio buttons for Approved Document, Document Needing Approval, Approved & Unapproved Document)
- G:** History Log (Checked checkbox for History Log)

- 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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Purchasing Document Approval Status Report

Refresh A

B	C	D	E	F	G	H	I	J	K	L									
Pur.Doc.Status	Doc Num...	Creator	Pur Grp	Self'd Appr	Assign Date	Assign Time	Approver	Rel Code	RelCode Desc	Release Status	Approval Date	Approval Time	App Durn	Poste App	Rel Date	Creation Time	Purchasing Org	Doc Date	Our Reference
Approved	45017084	SLBEG	C00	SLBEGN	05/17/2017	16:08:41	SLBEG	AG	Agency Appr	APPROVED	05/17/2017	16:08:46	0 days, 00:00...		05/17/20	16:08:13	DFA-FINANC	05/17/20	
			C00	SLBEGN	05/17/2017	16:08:46	SLBEG	OP	OSP Portal R	APPROVED	05/17/2017	16:09:00	0 days, 00:00...		05/17/20		DFA-FINANC	05/17/20	
			C00	SLBEGN	05/17/2017	16:09:01	SLBEG	DS	DIS Review	APPROVED	05/17/2017	16:09:15	0 days, 00:00...		05/17/20		DFA-FINANC	05/17/20	
			C00	SLBEGN	05/17/2017	16:09:09	SLBEG	OL	OSP Legal R	APPROVED	05/17/2017	16:09:24	0 days, 00:00...		05/17/20		DFA-FINANC	05/17/20	
			C00	SLBEGN	05/17/2017	16:09:22	SLBEG	AL	ALC Review	APPROVED	05/17/2017	16:09:33	0 days, 00:00...		05/17/20		DFA-FINANC	05/17/20	
Need Approval	45017084	SLBAN	328	HMDAV	05/18/2017	14:56:31	HMDAV	AG	Agency Appr	APPROVED	05/23/2017	10:39:42	4 days, 19:43...		05/18/20	14:55:51	DFA-FINANC	05/18/20	
			328	ATINELLU	05/23/2017	10:39:42		OM	OSP Manager	NOT APPRO			1 days, 21:59...		05/18/20		DFA-FINANC	05/18/20	
			328	AMLATO	05/23/2017	10:39:42		OM	OSP Manager	NOT APPRO			1 days, 21:59...		05/18/20		DFA-FINANC	05/18/20	
			328	J1GADD	05/23/2017	10:39:42		OM	OSP Manager	NOT APPRO			1 days, 21:59...		05/18/20		DFA-FINANC	05/18/20	
			328	PILINN	05/23/2017	10:39:42		OM	OSP Manager	NOT APPRO			1 days, 21:59...		05/18/20		DFA-FINANC	05/18/20	
			328	SLBANA	05/23/2017	10:39:42		OM	OSP Manager	NOT APPRO			1 days, 21:59...		05/18/20		DFA-FINANC	05/18/20	
			328	SLBEGN	05/23/2017	10:39:42		OM	OSP Manager	NOT APPRO			1 days, 21:59...		05/18/20		DFA-FINANC	05/18/20	
			328					OP	OSP Portal R	AWAITING AS					05/18/20		DFA-FINANC	05/18/20	
			328					DS	DIS Review	AWAITING AS					05/18/20		DFA-FINANC	05/18/20	
			328					OL	OSP Legal R	AWAITING AS					05/18/20		DFA-FINANC	05/18/20	
			328					AL	ALC Review	AWAITING AS					05/18/20		DFA-FINANC	05/18/20	

- A. **Refresh** button – updates data with any changes since the initial report execution.
- B. **Purchasing 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 initially created 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 previous 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).