

IES Purchasing: Authorize Orders – CP, ASO, MOD

Purpose

The purpose of this Document is to explain how to authorize CP, ASO and MOD Orders.

Summary of Order Types

- CP = Central Purchasing
- ASO = Automated Stock Orders
- DDP = Delegated Direct Purchasing
- MOD = Manufacture On Demand

Introduction

Purchase Requisitions, also called Proforma Orders, become Purchase Orders only when they are authorized. The approval of DDP Orders are different to other Orders, and is discussed in a separate Document. MOD Orders are approved on the Manufacture Sheets, and will be discussed 1st, followed by CP and ASO Orders, which form the main approval stream.

Approval of MOD Orders

MOD Purchase Requisitions are captured from the INPUT COSTS tab on the Manufacture Sheets, and are also approved there.

Mod: Work In Progress [2] ((ENG))

1 Headers | 2 Quote Items | 3 Input Costs | 4 WIP Notes | 5 WIP Options

Input Cost Elements: -

Supplier Order History | Stock Order History

Query Stock Item | Check Stock Levels

To load new Item(s), dbl-click an empty line. To remove or review an existing Item, dbl-click

	>>> Category	Code	Description	Ctrl	Budget
1	Stock	00010517	25KG WOVEN POLYPROPYLENE BAG	QTY	
2	Stock	01	PHOTO PAPER	QTY	
3	PO	MOD000048/1	Purchase Order		

Once a Purchase Requisition has been captured, it appears on the list of Input Costs. The Authorizer will simply dbl-click the Requisition, and then choose REVIEW OR AUTHORIZE PO.

- Review or Authorize PO
- Remove Item
- Quit

The system then opens the Purchase Order Control Sheet, and the Authorizer may drill into the Requisition by choosing ORDER ITEMS, and evaluate the details of the new Requisition. The Authorize may also make required changes, if any, or ask the Originator to make such changes before the Requisition will be approved.

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Po Control Sheet [3] (ENG)

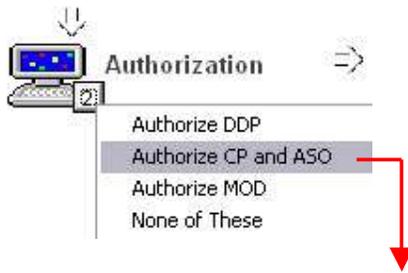
MOD: Purchase Order Control Sheet

PO Number:	00000014/3	Delegate:	DDP		Order Menu	Save
Direct Order Charges:	€ 0.00	Authorizer's option to delegate Landed Costs and Dates/Budgets.			Cancel	Approve
Direct Weight (%):	€ 0.00					
Total Dates:	€ 0.00					
Direct Charge Dates:	€ 0.00					

The Requisition may then be cancelled by choosing CANCEL, or approved by choosing APPROVE.

Approval of CP and ASO Orders

For approval of CP and ASO Orders, choose "(2) Authorization" from the main Purchasing options. Then choose 'Authorize CP and ASO'.



Authorize New Purchase Order(S) [2] (ENG)

Authorize CP and ASO Purchase Requisitions (Proforma Orders) EXIT

Operator: Data Manager

- Load the Proformas awaiting your approval. (Repeat this step to re-load Proformas you have deleted from the list.)
- Review any Proforma by dbl-clicking it.
- Is hard copy/Printing required now?
- If applicable, send a Message to the Capture Operator of a Proforma that requires further attention before you will approve it.
- Approve all Proformas remaining on the list.

Print While Authorizing ?

Note: Orders that are printed during the Authorization sequence are printed directly to a Printer. For HTML, File and eMail print options, please use the print option that is available on the PO Screens, after Authorization.

Load my Auth PO's

Authorize Now

dbl-click a Proforma to query it - Press DELETE on a Proforma that you do not want to Approve now (leave for later ...)

PO#	Order No's	Order Value	Supplier	Buyer	Originator
1	A902	€ 21,000.00	c00001 Anand & Withwal	Data Manager	Data Manager
2	A903	EUR 93.00	c00003 Wonder Bags	Data Manager	Data Manager
3	A904	USD 30.00	c00014 Hoskins Inc.	Data Manager	Data Manager
4	A905	USD 1,124.40	c9000 One Time Vendors	Data Manager	Data Manager
5	A906	€ 2,716.00	c00001 Anand & Withwal	Data Manager	Data Manager
6	CP3033	€ 20.00	c00001 Anand & Withwal	Data Manager	Data Manager
7	8806	EUR 8,199.00	c00003 Wonder Bags	Data Manager	Data Manager
8	8807	€ 2,095.30	c00001 Anand & Withwal	Data Manager	Data Manager

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There are 5 simple steps provided: -

- Load my Auth PO's
- Review
- Choose printing, if required
- Send Message(s) to Originators
- Authorize

LOAD MY AUTH PO'S

This step is essential. The system will only populate the Order Approval grid when this option is chosen. At this point, the system will check the queue of all new Requisitions, and load only those that are marked for approval by the current Operator.

REVIEW

Any Requisition loaded into the approval grid may be reviewed by doing a dbl-click on it, which will drill into the Requisition. Depending on the Operator's CP/ASO Profile, the Requisition is drilled with either ENQUIRY or UPDATE access. If UPDATE access is available, then the Authorizer can actually make changes and save it before authorizing the Order. If ENQUIRY access is indicated, then the Authorizer can only review the Requisition, but if any changes are required, then it will be necessary to communicate with the Originator to make such changes.

The approval grid will include all current Requisitions for approval by this Operator, but it is NOT necessary to authorize all of them at this time. Any Requisition listed on the approval grid may be removed by pressing DEL on it, and this will NOT delete the Requisition, but instead will only return it to the queue, from where it will be returned to the approval grid again whenever this Operator chooses "Load my Auth PO's" again.

PRINTING

The system can optionally print each Purchase Order at the time it is authorized, in which case the Print option should be checked, and this will initiate hard copy (i.e. printer) printing. However, it is not essential to print the PO's while authorizing them, as any Order can be printed afterwards, or any range of PO's, and after approval (authorization), more print options become available, e.g. Printer, HTML, e-mail, etc.

SEND MESSAGES

This is an optional step. If there is a need for the Authorizer to communicate with any Originator of a Requisition, then this step is ideal.

AUTHORIZE

This is the final step. When this option is selected, then all PO's currently listed on the approval grid is authorized.

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