Costpoint PR in Workflow

Quick Reference Guide (QRG)
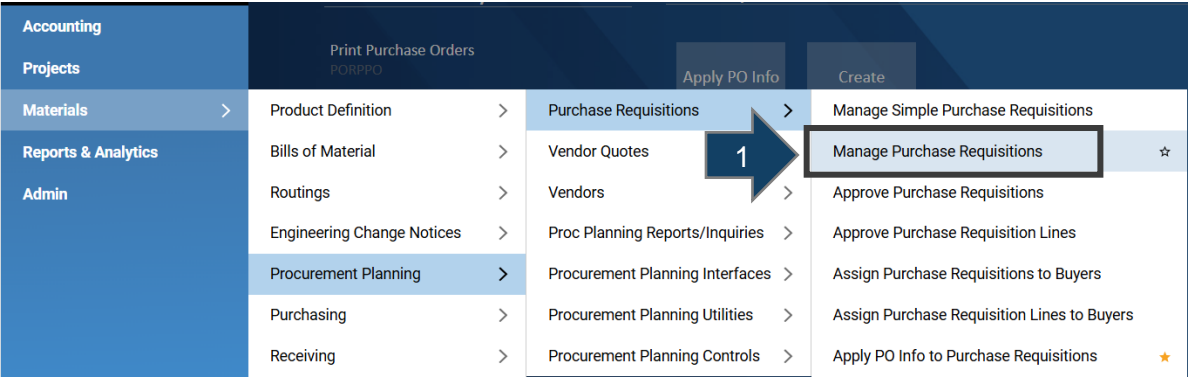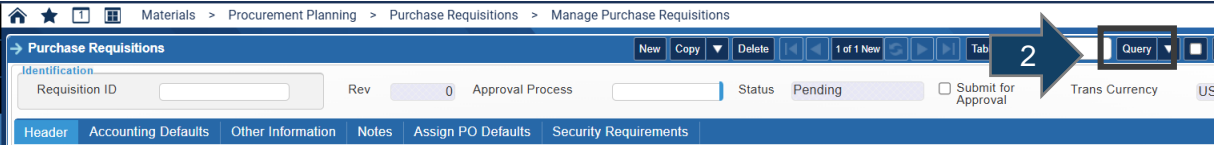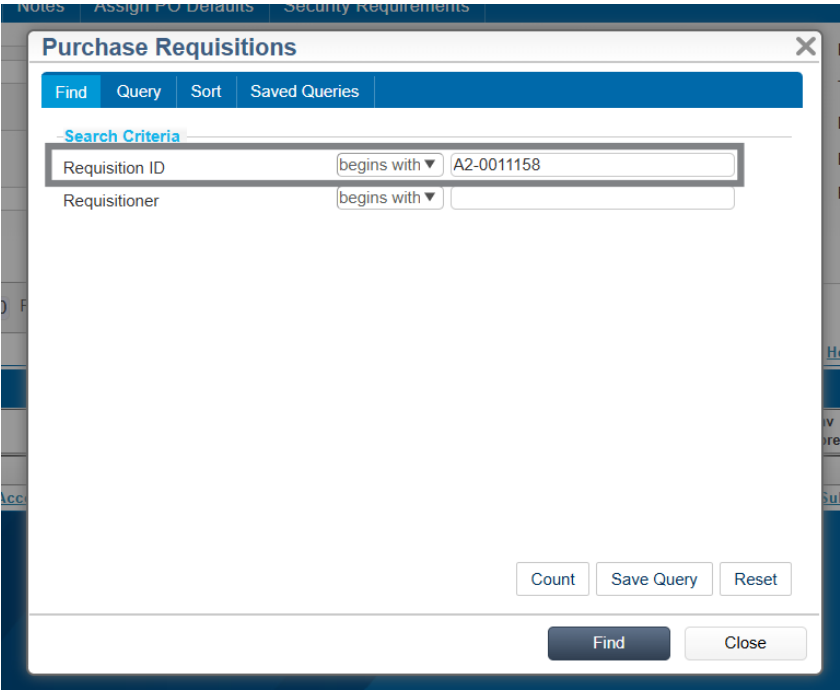
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Manage Purchase Requisitions	1. Begin Reviewing where in a workflow a PR is sitting selecting **Materials** > **Procurement Planning** > **Purchase Requisitions** > **Manage Purchase Requestion**. 2. Query the PR to review the status.
Query PR	3. Enter **Requestion ID** and click "**find**".

Costpoint PR in Workflow in Manage Purchase Requisition Screen
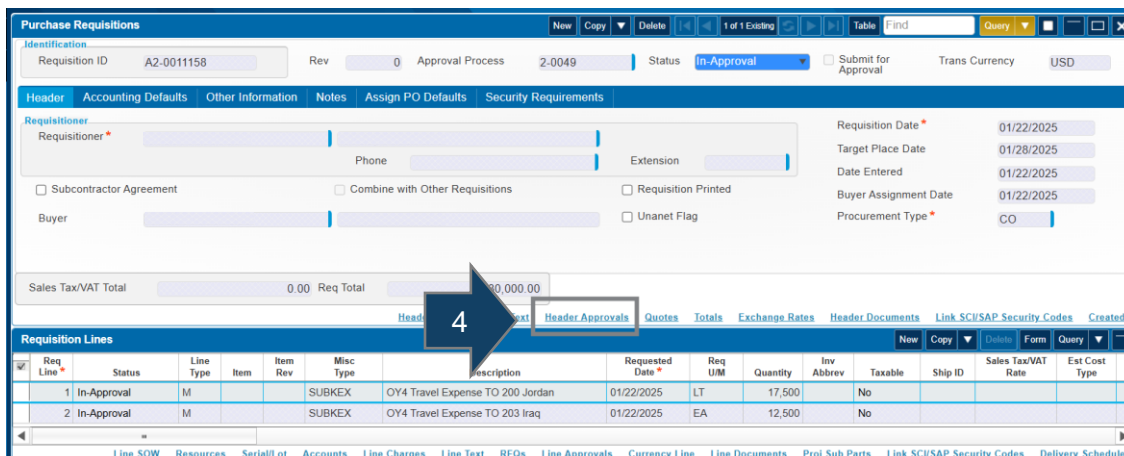
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Header

4. Select **Header Approvals** to review approvers for the workflow selected.
Below table shows the example of PR statuses and steps.

Status	Description	Steps
Pending	Waiting for PR to be submitted for Approval	Step 1
In-Approval	Waiting for Approval	Step 2
Approved	Approved	Step 3
Closed	Manually Closed	Step 3
Rejected	Rejected	Step 3
PO Generated	PO was generated for a PR	Step 4
Void	Canceled	Step 4

Note: Header Approvals will list approvers for an approval process selected for a particular PR.
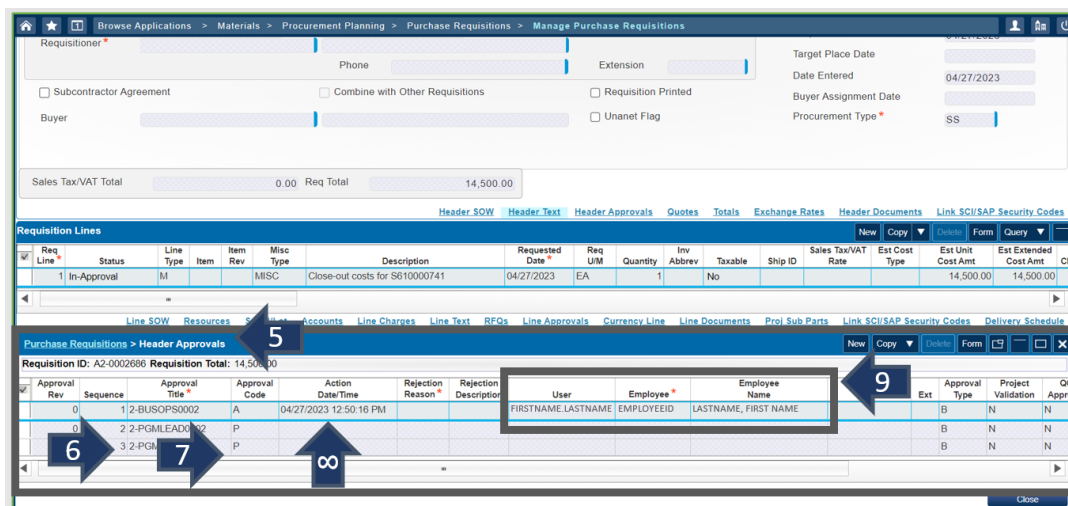

Accounting Defaults

5. **Header Approvals** to review approver details to determine who had approved it and whose approval is still pending.
6. **Approval Titles** includes approval titles for a specific workflow selected for this PR.
7. **Approval Code** refers to whether a PR was approved or rejected.
    a. Whether it lists "**A**", means a PR was approved by a specific approver in a workflow.
    b. Whether it lists "**R**" means a PR was rejected by a specific approver in a workflow, scroll to the right to review approval notes to correct/void PR and resubmit for approval.
    c. Whether it lists "**P**" means a PR is pending under specific approval level in a workflow.
8. Shows **Data Stamp** of Approval/Rejection of this PR.
9. Shows **who** under this specific Approval Titles has **approved/rejected** this PR.

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Steps and Screenshots

	1. Begin Reviewing where in a workflow a PR is sitting by selecting **Materials** > **Procurement Planning** > **Proc Planning Reports/Inquiries** > **Print Purchase Requisition Approval Status Report**.
Print Purchase Requisition Approval Status Report	
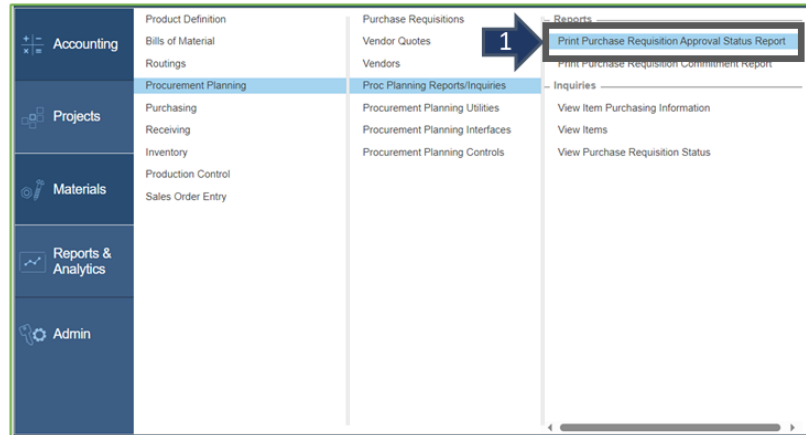
	2. Query for a PR to review the status by selecting under **Option** "**One**" to look for a single PR, enter **PR # under Start**.
	3. Select **Printing Approval Titles**:
	a. **Print Pending** – means to review approvers that are still pending, that will need to review to approve/reject this PR.
	b. **Print Current Pending** – means in whose queue this PR is right now and waiting for approval/rejection.
	c. **Print Approval History** – means and is only used when a PR has been fully Approved/Rejected/Generated. In other cases, the report will not be available. You will be able to review approval history with details.
	4. Select Options for requisitions by status, can be used **only** when **Print Approval History** is selected under Printing Approval Titles.
Query PR	5. Select and a report will be displayed.
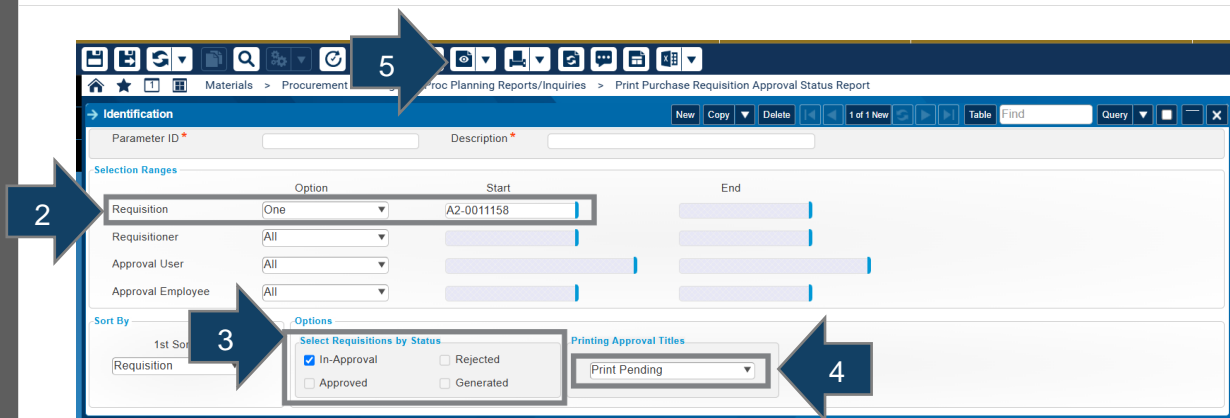
Status Report	6. In this example we selected "Print Pending" to review all pending approvers for a PR. This section shows the header details of a PR: Requisition #, Revision if any, Status, Estimated Amount and approval Process.

6. In this example we selected "Print Pending" to review all pending approvers for a PR. This section shows the header details of a PR: Requisition #, Revision if any, Status, Estimated Amount and approval Process.
7. Shows approval titles that the PR is under currently, that is Bus Ops and displays all potential approvers for this approval title.
8. Shows approval titles that the PR will be after Bus Ops that is Program Manager approval that displays all potential approvers for this approval title.

Revision

Revision	Date	Notes
NEW	01/30/2025	New QRG