

Security Role	BOR_PO_VENDORS_APPROVE
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Concept

This topic demonstrates how to approve or deny approval for a Supplier. Suppliers are entered and saved in the system as Unapproved. The Supplier must then be Approved in order for the Supplier to be available for ordering and payment.

The Supplier Approval page can be accessed either from the Worklist or by navigating directly to the Supplier Approval page.

Topic Objective:

Upon completion of this topic, you will be able to:

- Approve a previously unapproved Supplier to make it available for ordering and payment.

Assumptions

- User has been granted the security role BOR_PO_VENDORS_APPROVE.
- User has been granted the Authority to Approve user preference via the Supplier Processing Authority page (Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Supplier Processing Authority).
- A User should not be granted both the Authority to Enter and the Authority to Approve user preferences.

Dependencies/Constraints

- Self-approval of Suppliers is not allowed.
- Newly entered Suppliers will be saved as Unapproved when entered by a user who has been granted both the 'Authority to Enter' and 'Authority to Approve' user preferences. A different user with the 'Authority to Approve' user preference will then need to approve the Supplier.
- Approved Suppliers already existing in the system will remain in an Approved status if updated by a user who has both the 'Authority to Enter' and 'Authority to Approve' user preference. The supplier will NOT update to Unapproved and will NOT route through workflow for approval.

Additional Information

- Suppliers entered prior to Release 5.30, applied December 4, 2017, which remain Unapproved at the time of the release must be Approved from the Approve Suppliers page using the Supplier Status drop down menu. The Approve/Deny buttons will not be available for these suppliers.
- After Release 5.30, aside from the specific scenario mentioned above, Suppliers will no longer be able to be Approved from the Identifying Information tab of the Add/Update > Supplier page.
- The Supplier Status drop down menu will continue to be used for other status updates to the Supplier, such as setting a supplier to Inactive.

Procedure

In this topic, you will navigate to the Supplier Approval page for a specific Supplier and then approve the Supplier.

Step	Action
1.	Click the NavBar icon to access the NavBar options.
2.	Click the Navigator icon to access the menu.
3.	Click the Suppliers link.
4.	Click the Supplier Information link.
5.	Click the Approve link.
6.	Click the Approve Supplier link.
7.	Enter your SetID .
8.	Click the Search button. The Search Results will include all Suppliers that have a status of Unapproved.
9.	Select a Supplier from the list to approve.
10.	Enter Comments , if desired, in the Approval section and select Approve .
11.	The Supplier Status will update from Unapproved to Approved .
12.	Click the Save button.
13.	<p>Congratulations. You have just completed the Approving Suppliers section of this business process.</p> <p>Below are the key concepts of this section:</p> <ul style="list-style-type: none">- Suppliers entered in the system are saved as Unapproved.- An authorized user must approve the Suppliers to make them available for use.- Self-approval of Suppliers is not allowed. Approval authority is designated on the Supplier Processing Authority page (Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Supplier Processing Authority).

How to Deny Approval for a Supplier

Step	Action
1.	Click the Suppliers link.
2.	Click the Supplier Information link.
3.	Click the Approve link.
4.	Click the Approve Supplier link.
5.	Enter the SetID if not already populated.
6.	Click the Search button. The Search Results will include all Suppliers which have a status of Unapproved.
7.	Select a Supplier from the list to deny.
8.	Enter Comments in the Approval section and select Deny . Note: Comments are not required in order to deny, but are recommended.
9.	Click the Save button.
10.	The Supplier Status will update from Unapproved to Denied and an e-mail will be sent to the user who originally entered the supplier informing them the supplier status has been set to denied.
11.	<p>Congratulations. You have just completed the Denying Suppliers section of this business process.</p> <p>Below are the key concepts of this section:</p> <ul style="list-style-type: none"> - Suppliers entered in the system are saved as Unapproved. - An authorized user may deny the Supplier and the supplier would not be available for use. - The user who entered the supplier will receive an e-mail notification that the supplier has been denied.