

STEPS FOR INITIATING AND MONITORING THE AASIS APPROVAL PROCESS

Initiating a PR Approval

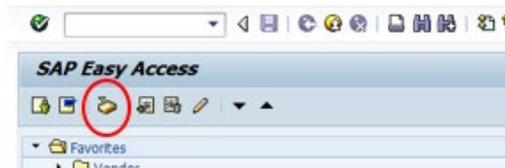
A PR, an OA, or a PO often requires multiple levels of approvals, based on the type of purchase, the initial contract amount (ICA), and/or the TPC. The release strategy will look similar to the following.

- The first four approvals are internal to your agency.
- The last three approvals take place at a State agency other than your own.
- Only the releases that are required for the transaction will appear in the list.

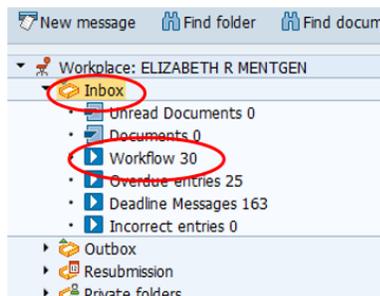
Code	Description	Status
25	Agency 10K - 25K	
R2	Agency > 100K	
R3	Agency Proc Manager	
R4	Agency Director	
R5	DFA Intergov Srvc	
R6	Dept of Info Systems	
R7	Governor's Office	

To initiate the approval workflow in AASIS, on your opening AASIS screen:

- Click on the Business Workplace (inbox) icon at the top of the screen to open the Business Workplace screen.



- On the Business Workplace screen:
 - Click on Inbox
 - Click on Workflow

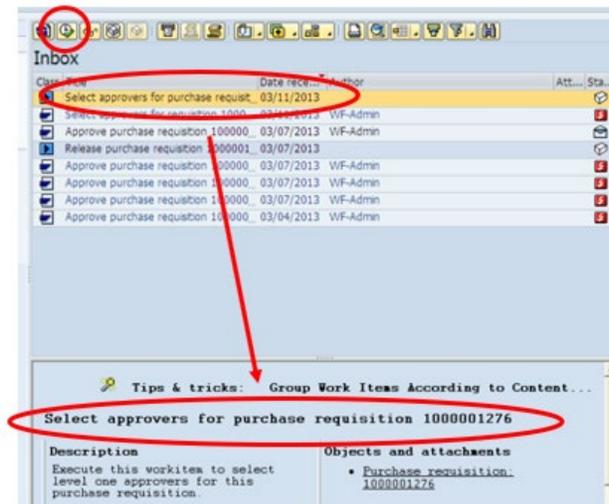


HELPFUL HINT

The number to the right of "Workflow" indicates the number of workflow items in your inbox.

Your list of Workflow items will pop up in a new window.

- To select the correct transaction, from the Workflow pop-up window, highlight the line for the appropriate transaction.
 - The lower part of the window will display the selected transaction.
- Select the green checkmark icon at the top of the window to execute.



In the next pop-up window, multiple persons may be listed as an approver.

- Select/highlight the correct approver.
 - See your supervisor if unsure who to select.
- Click on AUTOSEQUENCE to move the transaction into the selected person's business workflow.



- Click on DONE.



This transaction is now complete and moving forward in the procurement process.

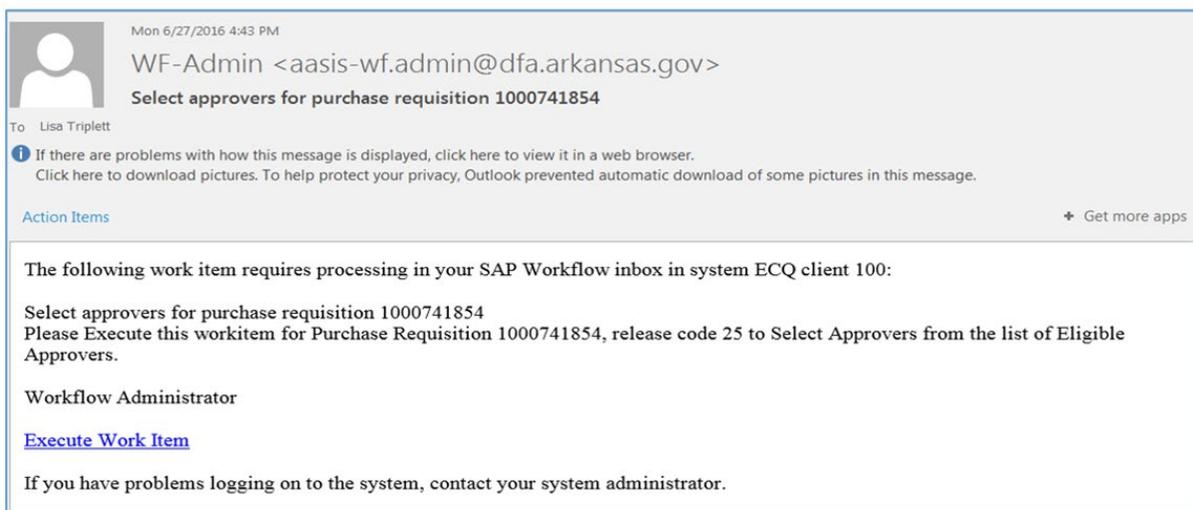
Monitoring the Approval Status

A requisitioner is responsible for a PR throughout the approval process and until it has been assigned to a buyer; therefore, it is critical for the requisitioner to monitor the PR to ensure it is moving smoothly through this process. Likewise, a buyer is responsible for the OA or PO approval process until the contract is awarded.

In addition to creating a message in AASIS workflow, when an approver has been selected, AASIS will trigger two emails:

1. To the requisitioner, or buyer, notifying him/her that the AASIS document has been routed for approval.
2. To the approver, notifying him/her that the AASIS document is awaiting approval.

The emails will look similar to the below.



The requisitioner or buyer will also receive an email each time a release has been executed or rejected for a PR/OA/PO.

To check the approval status of a PR, open the PR screen in AASIS using transaction ME53N Display Purchase Req and access the correct PR using the Other Purchase Requisition icon.

For an OA, use ME33K Display Contract, and for a PO, use ME23N Display Purchase Order.

Go to the Release strategy tab.

- Releases that are completed are indicated by a green checkmark.
- Releases that are not yet completed (or are rejected) are indicated by a yellow triangle.

The screenshot shows the SAP interface for displaying a purchase requisition. The title bar reads "Display Purchase Req. 1000758219". Below the title bar, there are navigation icons and a "Personal Setting" link. The main area has a dropdown menu for "Req to OA" set to "1000758219". There are three tabs: "Texts", "Release strategy" (which is selected and circled in red), and "Total Projected Cost". Below the tabs, there are several fields: "Release group" (RQ Requisition), "Release Strategy" (F2 PR=>100K TPC>1M), and "Release Indicator" (2 RFQ/purchase order). To the right, there is a table with three columns: "Code", "Description", and "Stat...". The table contains three rows: R2 (Agency > 100K) with a green checkmark, R3 (Agency Proc Manager) with a yellow triangle, and R4 (Agency Director) with a green checkmark. The "Stat..." column for R3 is circled in red.

Code	Description	Stat...
R2	Agency > 100K	✓
R3	Agency Proc Manager	▲
R4	Agency Director	✓