Purchase Order Analysis Inbox

Module Guide: Purchase Analysis Inbox (Purchase Order Review Inbox)

Module Location

Purchasing > Purchase Order > Purchase Analysis Approval

Module Objective

The **Purchase Analysis Inbox (Purchase Order Review Inbox)** module serves as the approval center for all **Purchase Analysis** documents that have been created and submitted. This module is used by a superior or manager to conduct a final review and provide approval for the report containing the analysis of purchasing activities.

1. Main View (Analysis List)

The main page of this module is an "inbox" that displays all Purchase Analysis documents requiring your action.

View Explanation & Filters

This page provides a summary of all analysis documents that are awaiting approval.

- **Filters**: You can search for a specific analysis document by **PO Analysis Number** or a date range (**Date From / Date To**

).

- **Request List**: The table below will display all analysis documents awaiting action. The table currently shows "...No Record Found...".

Column Explanation

- **PO Analysis Number**: The unique number of the submitted Purchase Analysis document.

- **Period Start Date / Period End Date**: The period covered by the analysis document.

- **PO Review Status / Approval**: Icons that indicate the document's status and the approval process status.

Button Functions

- **Approve**: The main action button to approve one or more selected analysis documents.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Purchase Analysis Inbox** module to see the list of analysis documents that require approval.

Step 2: Review the Analysis Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the analysis notes and the uploaded supporting files.

Step 3: Provide Approval

After you have reviewed and are certain about the submitted analysis:

1. Return to the main **Inbox** page.
2. Check the box in the leftmost column for one or more analysis rows you wish to approve.
3. Click the **Approve** button located in the bottom-left section of the page to process the approval. 

3. Workflow & Integrated Business Process

1. **Submission**: A user (e.g., a purchasing analyst staff) creates a document in the **Purchase Analysis** module and clicks **Confirm**.
2. **Entering the Queue**: The confirmed analysis document automatically enters the queue in this **Purchase Analysis Inbox** module.
3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.
4. **Finalization**: After approval, the analysis document becomes a final report and can be archived or used as a basis for strategic decision-making related to purchasing activities.

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