

# Comments and Attachments

Created on 2/20/2013 8:49:00 AM

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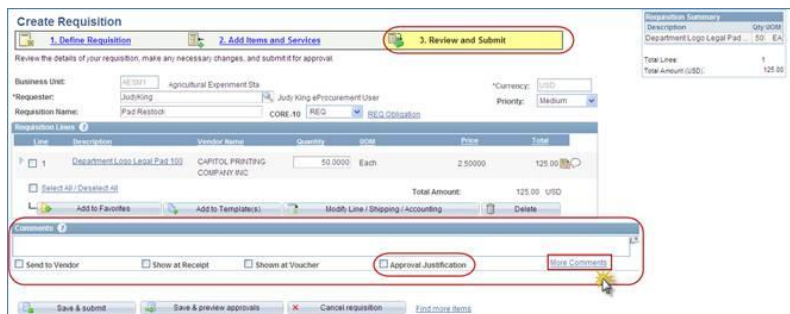
## Comments and Attachments



Requisition comments and attachments enable requesters to communicate supplemental information and requirements to approvers and other Core-CT users. Comments and attachments are always tied to the requisition. Core-CT 9.1 has added functionality for adding multiple comments and attachments to the requisition header as well as to each line of the requisition.

### Header Comments and Attachments

Header comments and attachments are added on the **Review and Submit** page after the requester has already added items and services to the requisition. These are typically used to relay information regarding the entire requisition and all the items on a multiple line requisition.



### Approval Justification

The requester can select to have comments display on the **Requisition Approval** page. Approvers can view comments without having to open the requisition.

### More Comments

Clicking this link opens the **Header Comments** page. From this page the requester can:

- Select Standard Comments
- Add Attachments
- Add multiple comment lines.

## Use Standard Comments

ePro Requesters can use existing **Standard Comments**. Click the **Use Standard Comments** link to display the **Standard Comments** page.

Click **Search** to display all available comments.

Click the **Select** checkbox next to any comment to add it to the requisition. Click **OK**.

The **Header Comments** page displays the standard comment. Click **OK** to save the comment.

## Add Attachments

ePro requesters can add multiple header and line attachments.

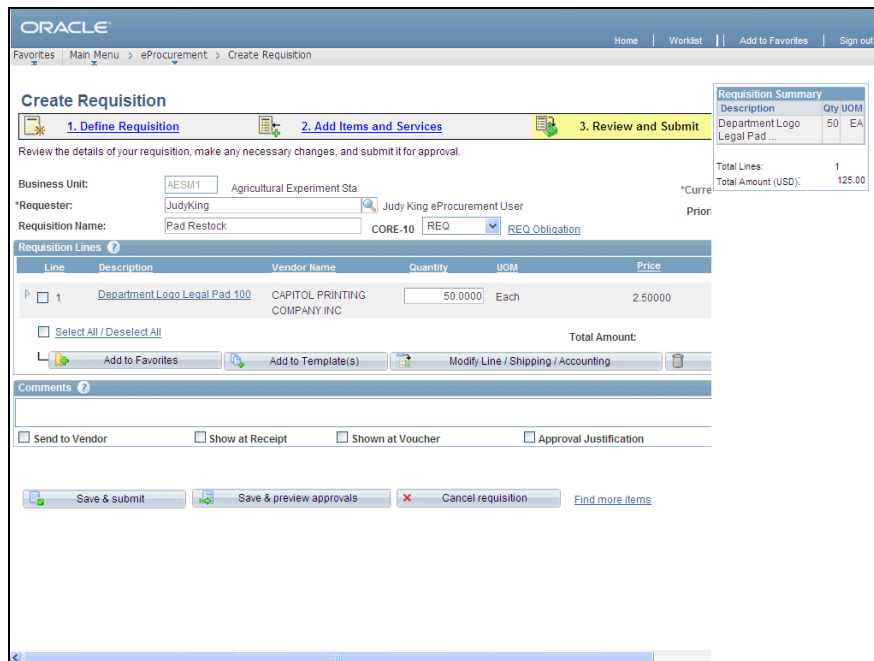


Attachments remain permanently associated with the requisition within Core-CT. Attachments can be sourced to Purchase Orders if the requester selects the Send to Vendor option. Attachments are included when a PO is dispatched via email. Attachments are not included for POs dispatched via Print, Fax, and Electronic Data Exchange (EDX).


Click [here](#) for a Printable PDF version.

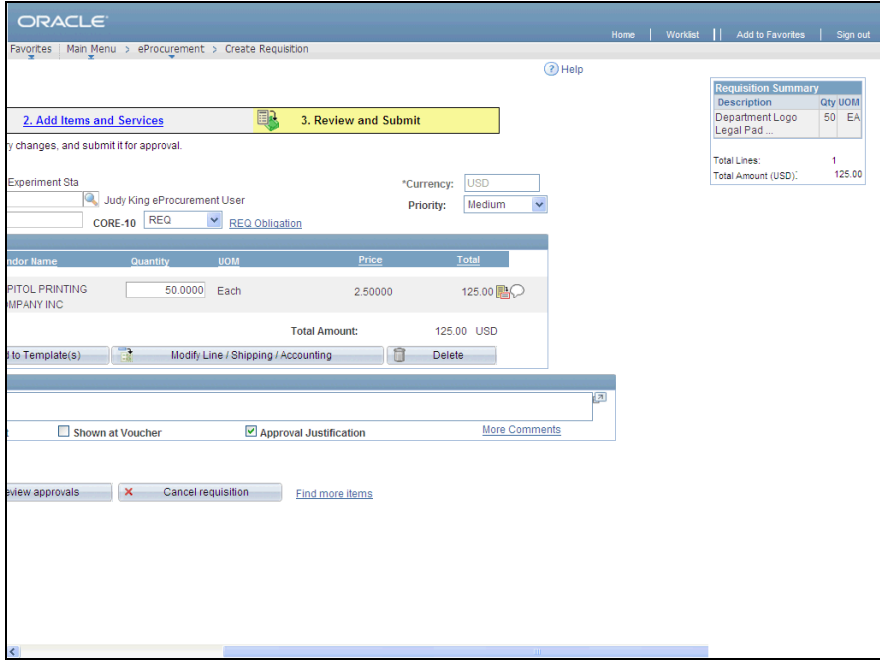
## Procedure


Navigation: eProcurement > Create Requisition

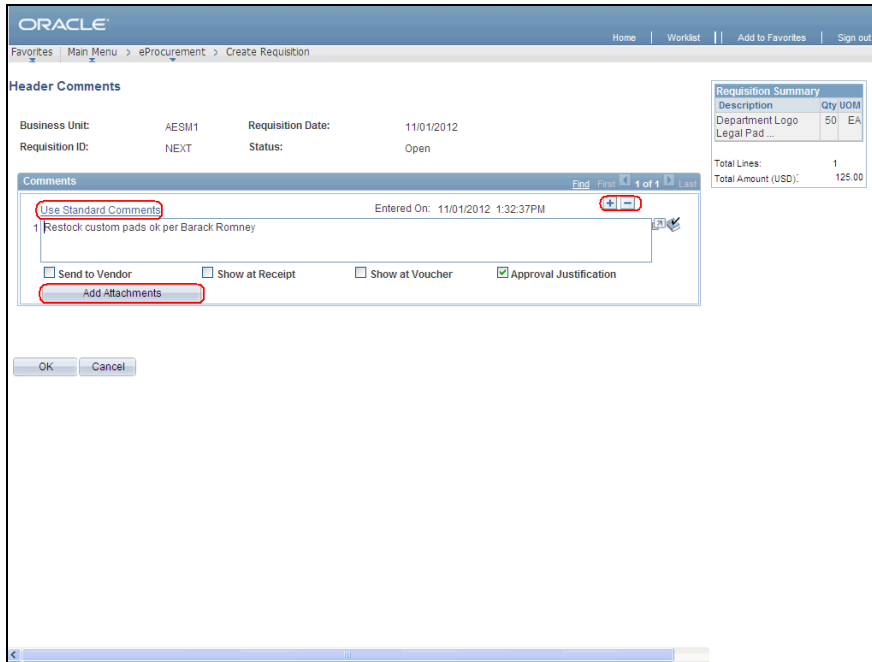



Step	Action
1.	Enter <b>Restock custom pads ok per Barack Romney</b> into the <b>Comments</b> field.
2.	Click the <b>Approval Justification</b> option to have the comment display on the <b>Requisition Approval</b> page. <input type="checkbox"/>

Step	Action
3.	Click the scrollbar. 



Step	Action
4.	Click the <b>More Comments</b> link. 



Step	Action
5.	<p>The <b>Header Comments</b> page displays the entered comment as well as the following options:</p> <ul style="list-style-type: none"> <li>- <b>Use Standard Comments</b></li> <li>- <b>Add Attachments</b></li> <li>- Add and delete comment rows</li> </ul>
6.	<p>Click the <b>Add a new row</b> button.</p> 

ORACLE  
 Home | Worklist | Add to Favorites | Sign out  
 Favorites | Main Menu > eProcurement > Create Requisition

**Header Comments**

Business Unit: AESM1      Requisition Date: 11/01/2012  
 Requisition ID: NEXT      Status: Open

Requisition Summary	
Description	Qty UOM
Department Logo	50 EA
Legal Pad ...	
Total Lines: 1	
Total Amount (USD): 125.00	

**Comments**      Entered On: 11/01/2012 1:32:37PM

1 [Use Standard Comments](#)  
 Restock custom pads ok per Barack Romney

Send to Vendor     Show at Receipt     Show at Voucher     Approval Justification

2 [Use Standard Comments](#)      Entered On: 11/01/2012 1:49:20PM

Send to Vendor     Show at Receipt     Show at Voucher


  


Step	Action
7.	Click the <b>Use Standard Comments</b> link. 

ORACLE  
 Home | Worklist | Add to Favorites | Sign out  
 Favorites | Main Menu > eProcurement > Create Requisition

**Standard Comments**      Help

**Search Criteria**


Comment Type:       

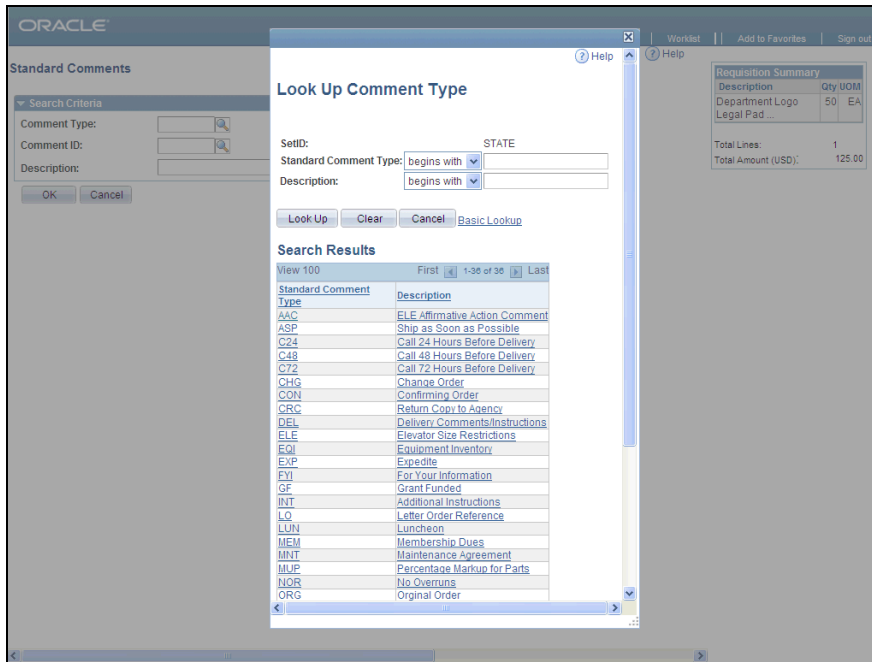
Comment ID:       

Description:

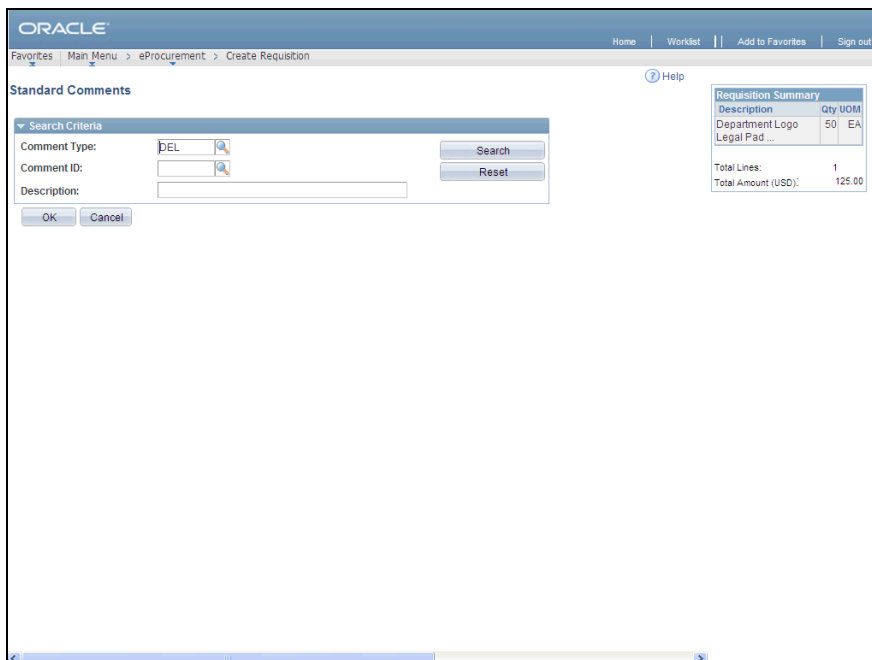
  


Requisition Summary	
Description	Qty UOM
Department Logo	50 EA
Legal Pad ...	
Total Lines: 1	
Total Amount (USD): 125.00	

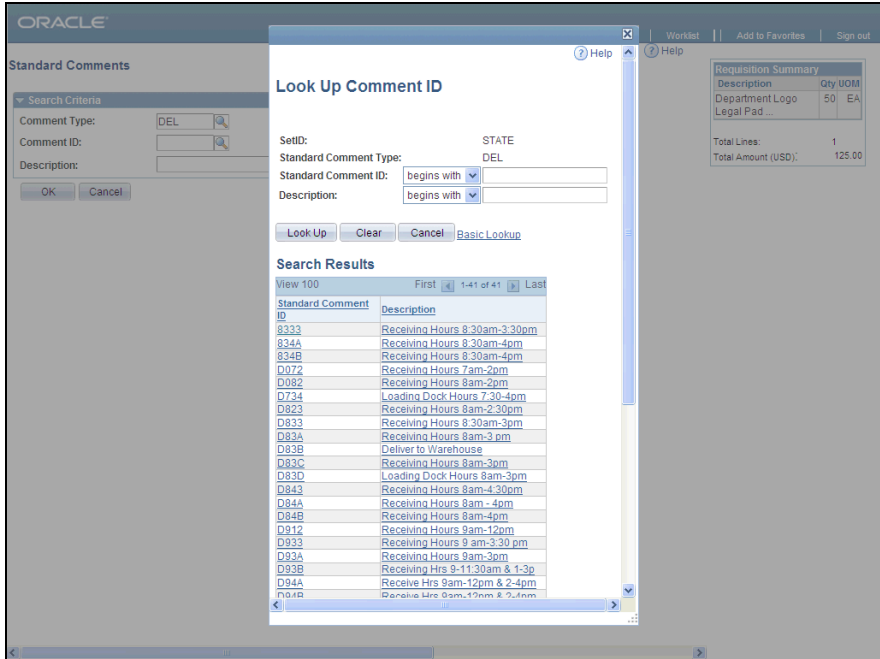
Step	Action
8.	Click the <b>Look up Comment Type</b> button. 




Step	Action
9.	Click the <b>DEL</b> link to view delivery comments and instructions.

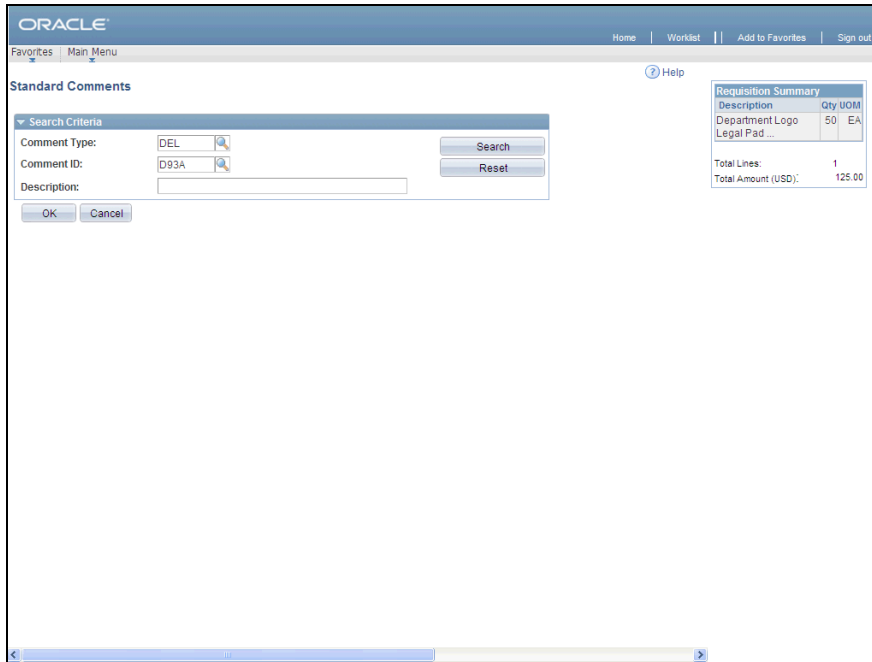


Step	Action
10.	Click the <b>Look up Comment ID</b> button. 

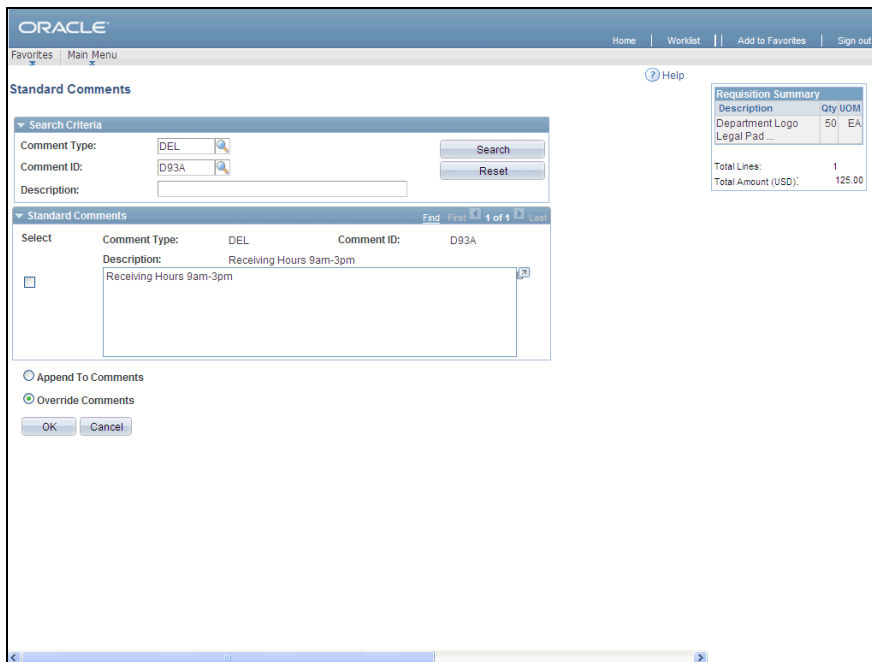



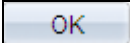
Step	Action
11.	Click the <b>D94A</b> link to select the <b>Receive Hours 9am-12pm &amp; 2-4pm</b> comment. 

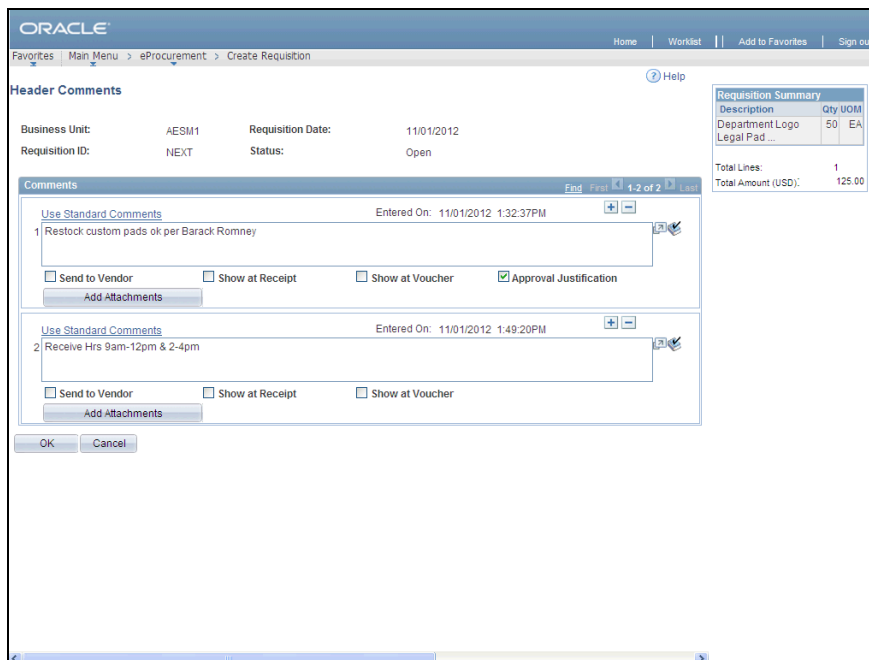




Step	Action
12.	Click the <b>Search</b> button.



Step	Action
13.	Click the <b>Select</b> option. 
14.	Use the <b>Append to Comments</b> checkbox to add the standard comment to an existing comment.  Otherwise accept the default <b>Override Comments</b> .
15.	Click the <b>OK</b> button. 



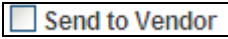
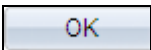
The screenshot shows the Oracle eProcurement 'Header Comments' window. The window title is 'ORACLE' and the breadcrumb is 'Favorites | Main Menu > eProcurement > Create Requisition'. The 'Header Comments' section displays the following information:

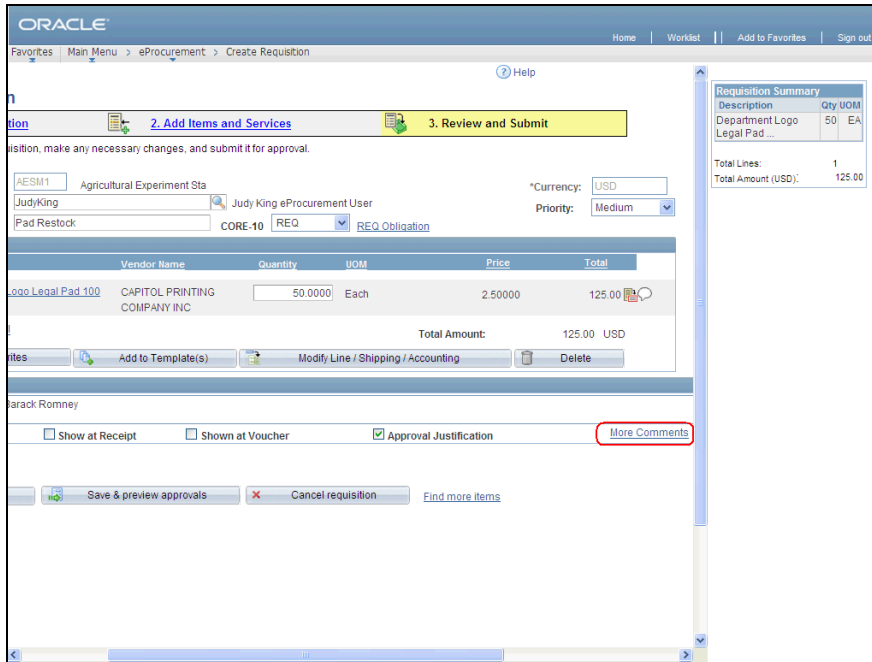
- Business Unit: AESM1
- Requisition Date: 11/01/2012
- Requisition ID: NEXT
- Status: Open


The 'Comments' section shows two comments:

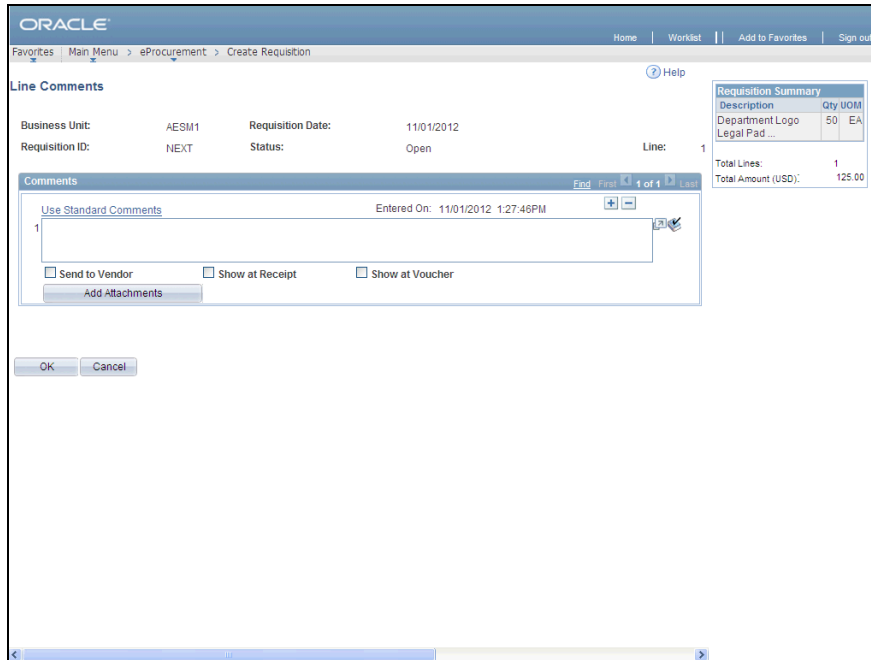
- Comment 1: Restock: custom pads ok per Barack Romney. Entered On: 11/01/2012 1:32:37PM. Options:  Send to Vendor,  Show at Receipt,  Show at Voucher,  Approval Justification.
- Comment 2: Receive Hrs 9am-12pm & 2-4pm. Entered On: 11/01/2012 1:49:20PM. Options:  Send to Vendor,  Show at Receipt,  Show at Voucher.

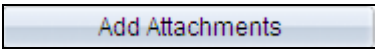
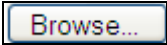
The 'Send to Vendor' checkbox for the first comment is highlighted with a red box. The 'OK' button is also visible at the bottom of the window.

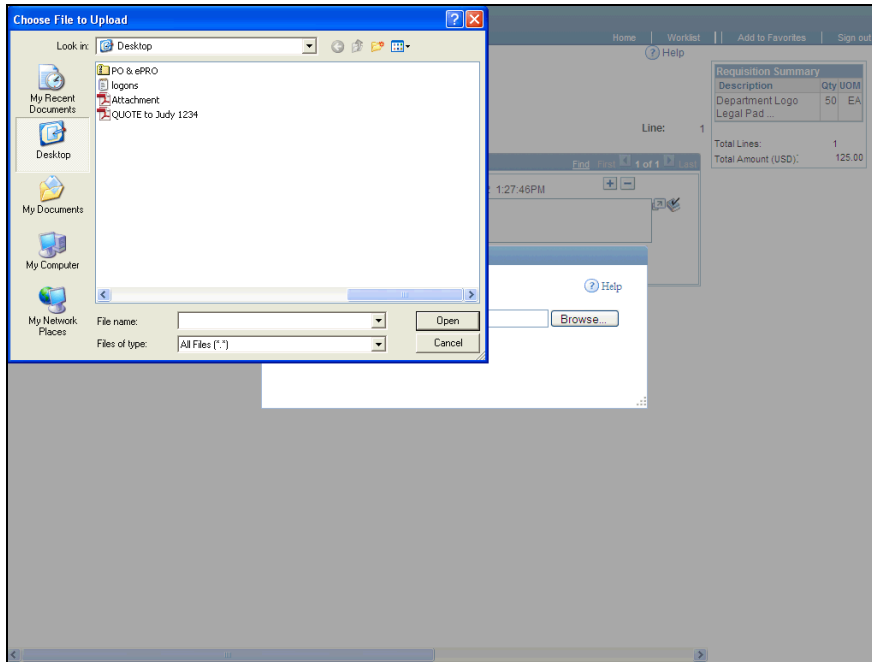
Step	Action
16.	The field populates with the standard comment.  Click the <b>Send to Vendor</b> option to have the comment print on the vendor PO header. 
17.	Click the <b>OK</b> button to save the comments and close the <b>Header Comments</b> page. 



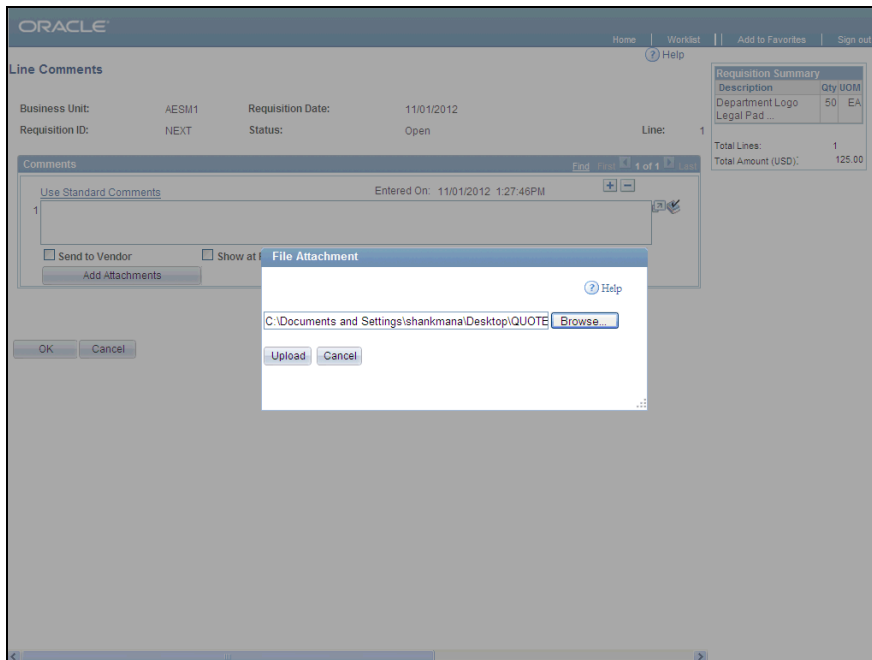
Step	Action
18.	The <b>Review and Submit</b> page displays only the first header comment.  Click the <b>More Comments</b> link at any time to view the additional rows.
19.	In this scenario the vendor requires that a copy of the quotation be sent with the PO.  Click the <b>Add/Edit Line Comments</b> button. 

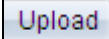


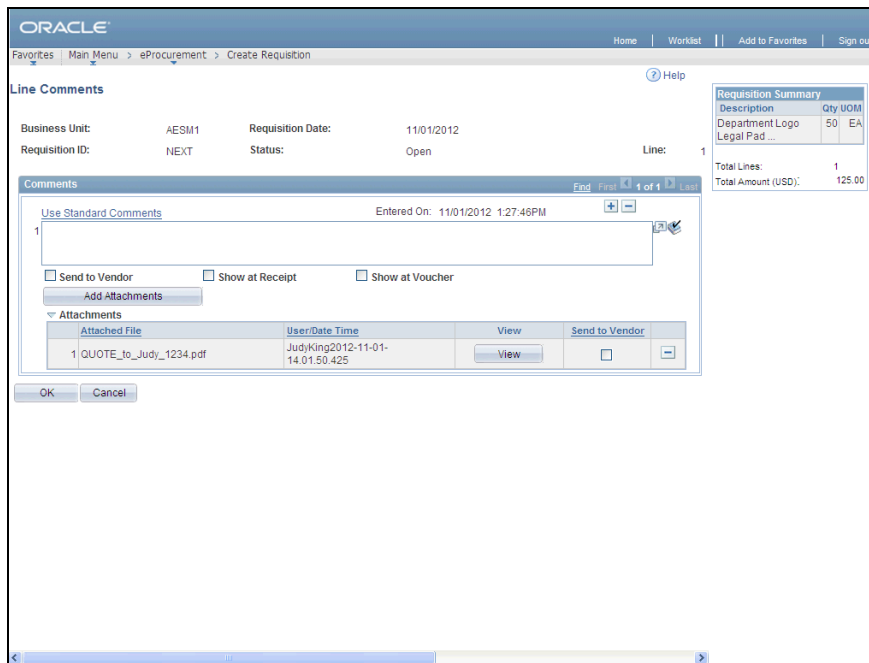
Step	Action
20.	<p>The <b>Line Comments</b> page displays. The options on this page are consistent with those found on the Header Comments page.</p> <p>Click the <b>Add Attachments</b> button.</p> 
21.	<p>Click the <b>Browse...</b> button to locate the quotation file.</p> 

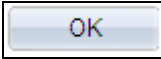


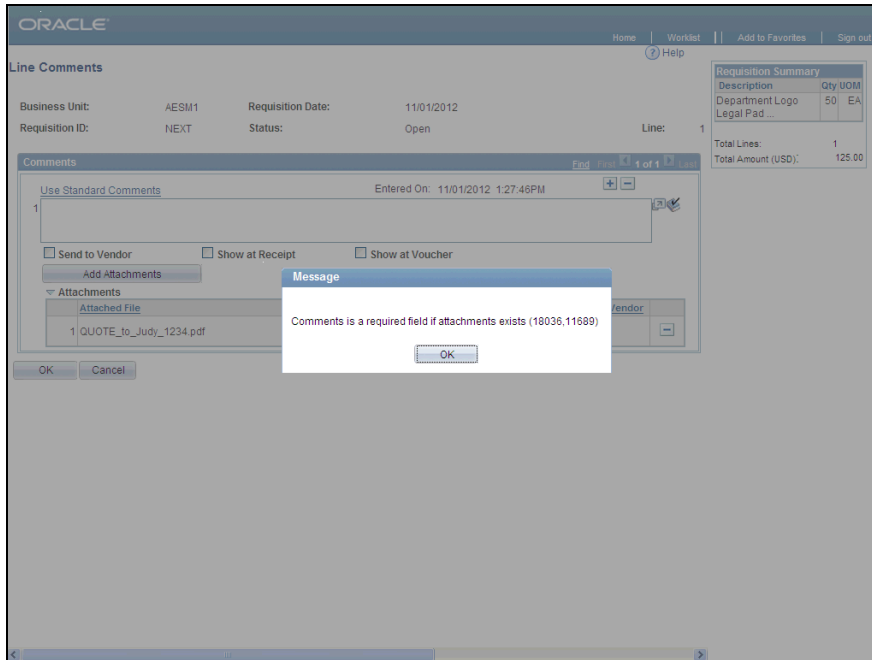
Step	Action
22.	Click the <b>QUOTE to Judy 1234</b> PDF file.
23.	Click the <b>Open</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Open</div>

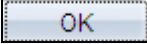


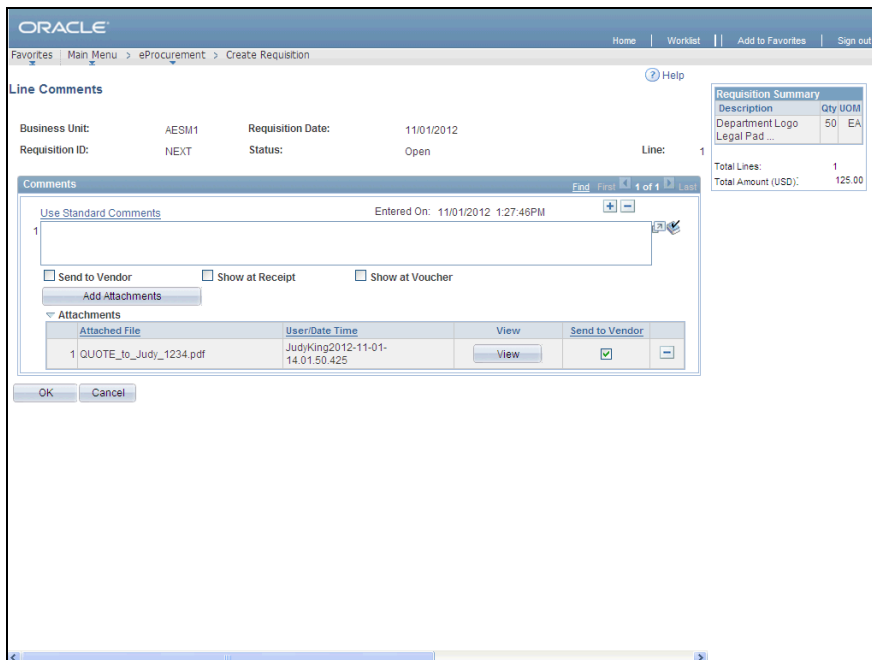
Step	Action
24.	Click the <b>Upload</b> button. 

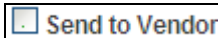
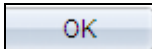


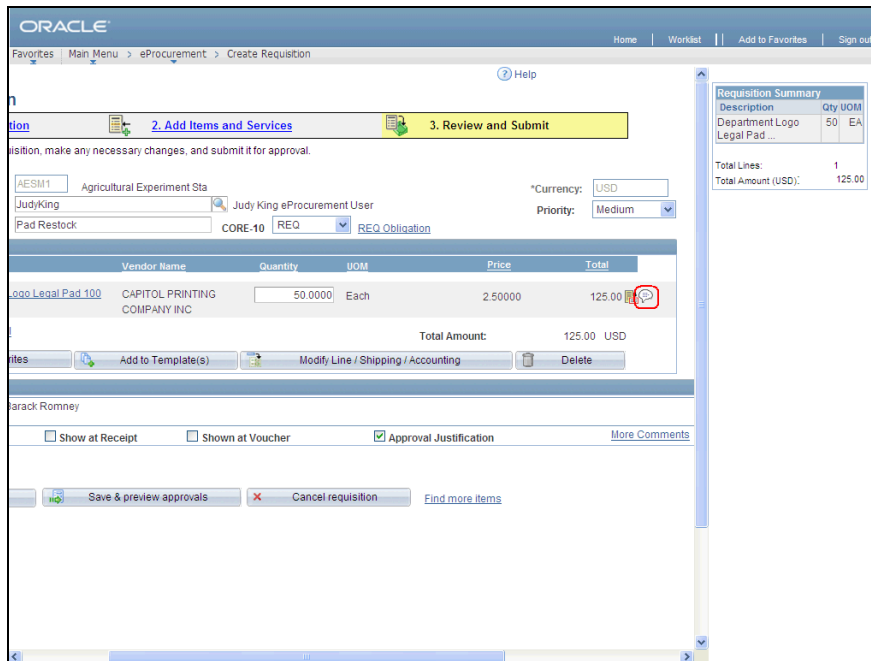
Step	Action
25.	The attachment is only included when a PO is dispatched via email. It is not included in POs dispatched via Print, Fax, and EDX.  Click the <b>Send to Vendor</b> option to have the attachment sent with the PO created from this requisition. <input type="checkbox"/>
26.	Click the <b>OK</b> button. 




Step	Action
27.	<p>A comment is required when using attachments.</p> <p>"See Attachment" is not an acceptable comment.</p> <p>Click the <b>OK</b> button.</p> 



Step	Action
28.	Enter <b>Quotation is attached per your request</b> into the <b>Comments</b> field.
29.	Click the <b>Send to Vendor</b> option. 
30.	Click the <b>OK</b> button. 



Step	Action
31.	The <b>Line Comments</b> icon indicates comments have been entered.  Click the scrollbar. 



ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: AESM1 Agricultural Experiment Sta

Requester: JudyKing Judy King eProcurement User

Requisition Name: Pad Restock CORE-10 REQ REQ Obligation

Line	Description	Vendor Name	Quantity	UOM	Price
1	Department Logo Legal Pad 100	CAPITOL PRINTING COMPANY INC	50.0000	Each	2.50000

Total Amount: 125.00

Comments: Restock custom pads ok per Barack Romney

Send to Vendor  Show at Receipt  Shown at Voucher  Approval Justification

Save & submit | Save & preview approvals | Cancel Changes | Find more items

Step	Action
32.	Click the <b>Save &amp; submit</b> button.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu

### Confirmation

Requested For: Judy King eProcurement User

Requisition Name: Pad Restock

Requisition ID: 0000005340

Business Unit: AESM1

Status: Pending

Priority: Medium

Budget Status: Not Checked

Number of Lines: 1

Total Amount: 125.00

Justification: Restock custom pads ok per Barack Romney

REQ Obligation

Amount Approval

Pad Restock: Pending

Req Amount: Pending

Comment History: Robin Quivers CT WF REQ AMT APPROVER 1

Req Budget Approval

Pad Restock: Awaiting Further Approvals

Req Bgt Appv: Not Routed

Comment History: Multiple Approvers CT WF REQ BUDGET APPROVER

Step	Action
33.	The <b>Confirmation</b> page displays the <b>Approval Justification</b> comment.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement > Manage Requisitions

New Window | Help | Personalize Page | http

### Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
Pad Restock	000005340	AESM1	11/01/2012	Open	125.00

**Header Comments:**  
 Comment 1: Restock custom pads ok per Barack Romney  
 Comment 2: Receiving Hours 9am-3pm

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	Department Logo Legal Pad 10...	Not Source	N	50.0000 Each	2.50000 USD	Open	125.00

**Line Comments:**  
 Comment 1: Quotation is attached per your request.

[Edit Requisition](#)

[Return to Manage Requisitions](#)      [Requisition Schedule and Distribution](#)

Step	Action
34.	Comments and attachment links are displayed on the <b>Manage Requisitions - Requisition Details</b> page.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement > Manage Requisitions

### Approval Status

Business Unit: AESM1  
 Requisition ID: 000005340  
 Requisition Name: Pad Restock  
 Requester: [Judr King eProcurementUser](#)  
 Entered on: 11/01/2012  
 Status: Pending  
 Priority: Medium  
 Budget Status: Not Checked

Total Amount: 125.00 USD  
[REQ Obligation](#)

**Requester's Justification:**  
 Restock custom pads ok per Barack Romney

[View printable version](#)

**Line Information**

Line	Item Description	Vendor Name	Quantity	UOM	Price	Requester's Comments
<input checked="" type="checkbox"/>	1 Department Logo Legal Pad 10...	550838832F-001	50.0000	EA	2.50000 USD	

Select All / Deselect All  
[View Line Details](#)

**Review/Edit Approvers**

**Amount Approval**  
 Pad Restock: Pending [View/Hide Comments](#)

Req Amount  
 Pending  
 Robin Quivers  
 CT WF REQ AMT APPROVER 1

**Comment History**

**Req Budget Approval**

Step	Action
35.	Approvers can review comments from approval page.

Business Unit: AESM1		Requester: JudyKing		Status: Open			
Requisition: 0000005340		Requested By: Judy King eProcurement User		Currency: USD			
Requisition Name: Pad Restock		Entered Date: 11/1/12		Requisition Total: 125.00			
<b>Header Comments:</b> Restock custom pads ok per Barack Romney Receiving Hours 9am-3pm							
Line: 1	Item Description: Department Logo Legal Pad 100 Sheets	Quantity: 50.0000	UOM: EA	Price: 2.50	Line Total: 125.00		
Line Status: Open							
<b>Line Comments:</b> Quotation is attached per your request.							
Ship Line: 1		Ship To: 0630000001		Address:			
Attention: Judy King eProcurement User		Due Date:		123 Huntington Street State Building New Haven CT 06511 United States			
				Shipping Quantity: 50.0000			
				Shipping Total: 125.00			
<b>Dist</b>	<b>Status</b>	<b>Location</b>	<b>Qty</b>	<b>PCT</b>	<b>Amount</b>	<b>GL Unit</b>	<b>Account</b>
1	Open	0630000001	50.0000	100.00	125.00	STATE	54060
<b>Dept</b>	<b>Fund</b>	<b>Program</b>	<b>Class</b>	<b>Budget Ref</b>			
AES48013	11000	14000	10020	2013			
<b>Open QTY</b>	<b>PC BU</b>	<b>Project</b>	<b>Open Amt</b>				
50.0000	NONPC	AES_NONPROJECT	0.000				
<b>GL Base Amount</b>	<b>Currency</b>	<b>Sequence</b>	<b>Capitalize</b>				
125.00	USD	0	N				

Step	Action
36.	Comments display on the <a href="#">View Details</a> page available to Core-CT requesters and approvers.
37.	<b>End of Procedure.</b>