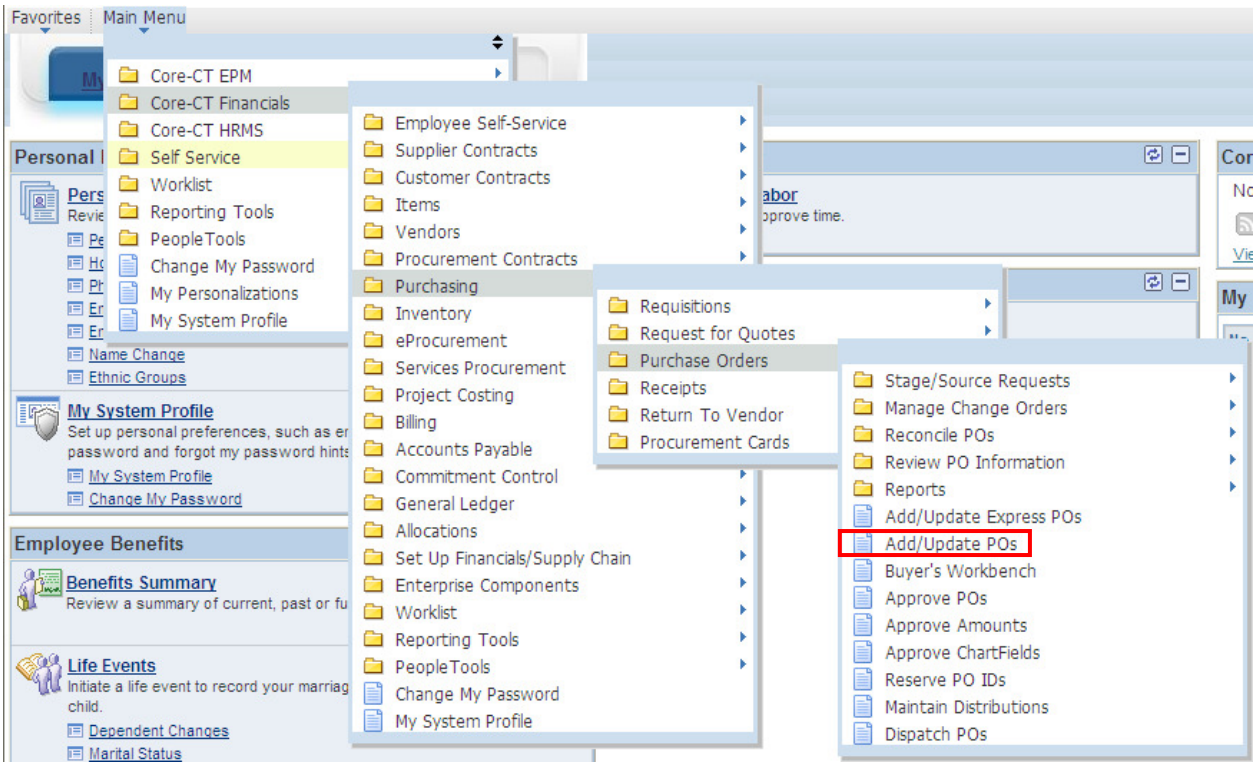
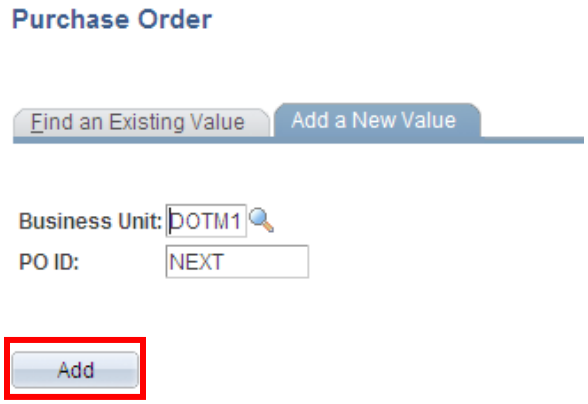
Creating an Online Purchase Order in Core-CT

Navigation: Main Menu > Core-CT Financial > Purchasing > Purchase Orders > Add/Update POs



Your Business Unit should default in and the **PO ID** field should contain the word NEXT. Click Add.



Find an Existing Value | Add a New Value

Maintain Purchase Order

Purchase Order

Business Unit: DOTM1
PO ID: NEXT
Copy From:
PO Status: Initial
Budget Status: Not Chk'd
Hold From Further Processing

Header

*PO Date: 01/14/2013 Vendor Search
*Vendor: Vendor Details
*Vendor ID:
*Buyer: TurbertJ DOT-TURBERT Julie
PO Reference:
Header Details Activity Summary
PO Defaults
Add Comments
PO Activities Add ShipTo Comments

Receipt Status: Not Recvd
*Dispatch Method: Dispatch

Amount Summary

Merchandise: 0.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 0.00 USD
Total PO Obligation: 0.000 USD

Add Items From

Purchasing Kit Catalog Item Search

Lines

Personalize | Find | View All | First 1 of 1 Last

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1						0	0.000	Open

View Printable Version
View Approvals
Close Short All Lines
*Go to: ... More ...

Save Notify Refresh Add Update/Display

If you wish to create a PO by copying from a Contract or another Purchase Order, select the drop down box at **Copy From.**

State of Connecticut

Home Worklist Add to My Links

Favorites Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

Finance Core-CT Help

My Links Select One:

Maintain Purchase Order

Purchase Order

Business Unit: DOTM1
PO ID: NEXT
Copy From:
Contract
Purchase Order
PO Status: Initial
Budget Status: Not Chk'd
Hold From Further Processing

Header

*PO Date: Vendor Search
*Vendor: Vendor Details
*Vendor ID:
*Buyer: TurbertJ DOT-TURBERT Julie
PO Reference:
Header Details Activity Summary
PO Defaults
Add Comments
PO Activities Add ShipTo Comments

Receipt Status: Not Recvd
*Dispatch Method: Dispatch

Amount Summary

Merchandise: 0.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 0.00 USD
Total PO Obligation: 0.000 USD

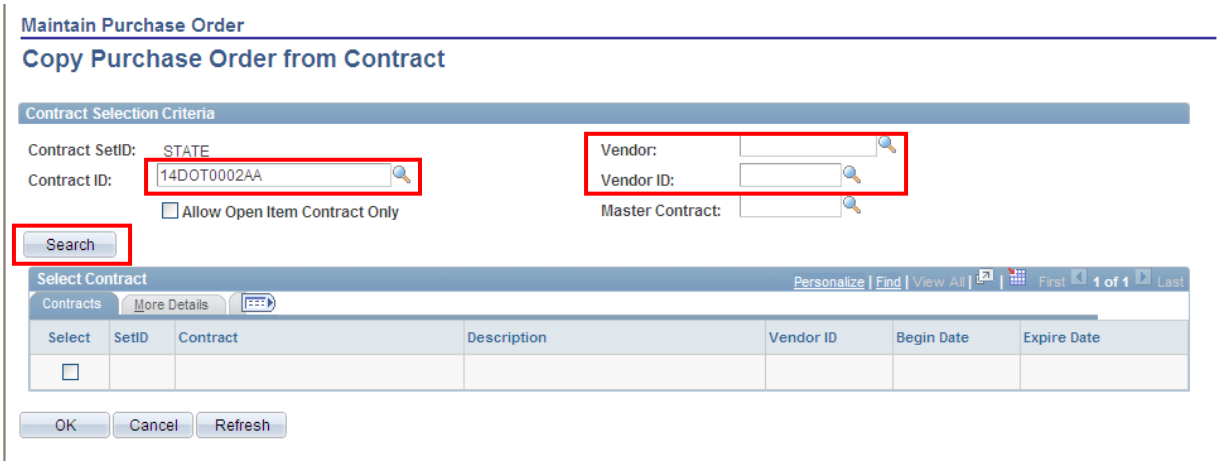
Add Items From

Purchasing Kit Catalog Item Search

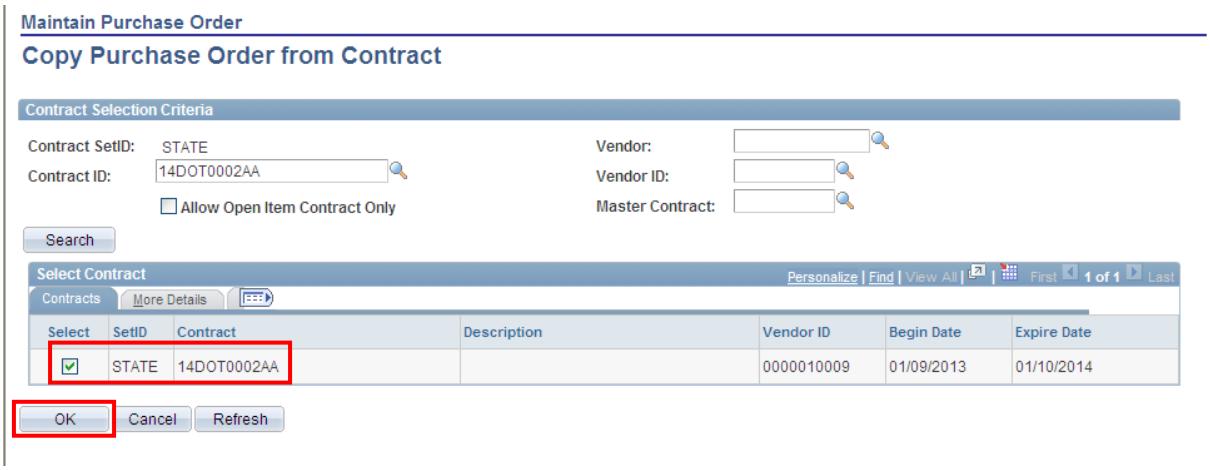
Choose what you wish to copy, you will be taken to the page where you can enter the specific PO number or Contract number you wish to copy.

Copy from Contract

You can search for an existing contract by Contract ID, Vendor, or Vendor ID. Use the search icon to look for existing values. Once you have found the contract you are looking for, click Search.



This will bring the contract information down to the Select Contract section. Check the box next to the contract, then click OK.



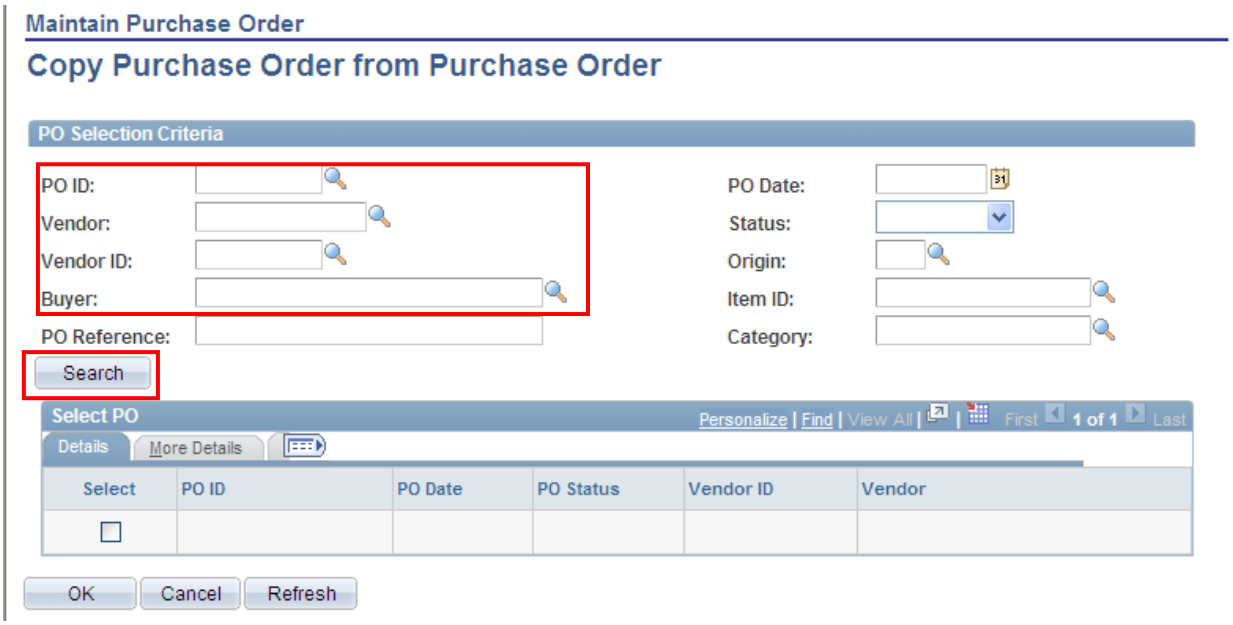
The information from the contract you selected has been copied over. Continue on and make any changes to the fields, if necessary.

Creating a PO from a POC/N, PSC/N or SCS Contract:

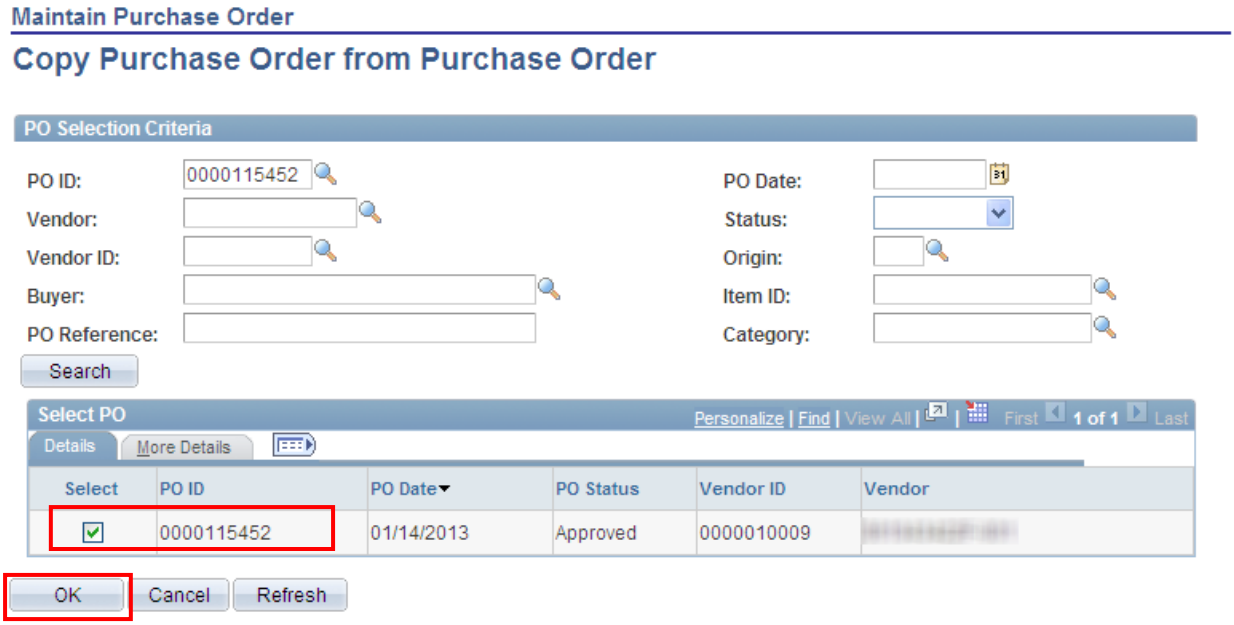
To create a PO from a POC/N, PSC/N or SCS contract, please ensure that the required information has been entered into the contract including line and distribution information, and that all information is correct. Use the Copy From drop down box located at the top of the page. Select Contract, enter the contract number and hit OK. This will copy all Contract information into the PO. Use the Header Details link to correct the PO Type. Add a Buyer for the PO. Complete the PO Obligation tab. On a PO copied from a contract, do not use the PO Defaults on the PO as it may overwrite the info carried over from the contract.

Copy from Purchase Order

You can search for an existing PO by PO ID, Vendor, Vendor ID, Buyer, etc. Use the search icon to look for existing values. Once you have found the purchase order you are looking for, click Search.



This will bring the pruchase order information down to the Select PO section. Check the box next to the PO ID, then click OK.



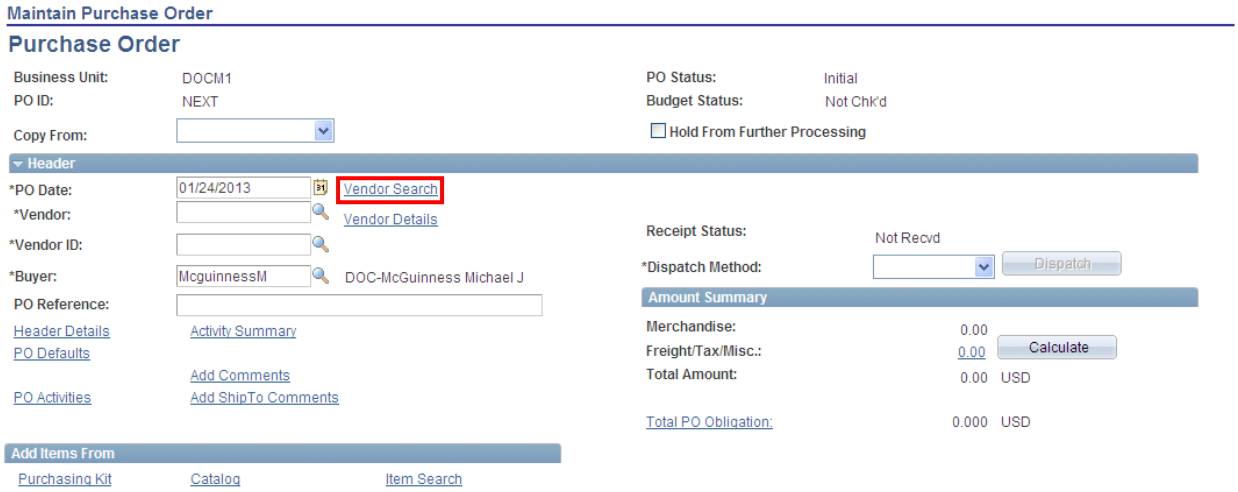
The information from the PO you selected has been copied over. Continue on and make any changes to the fields, if necessary.

Adding a new Purchase Order:

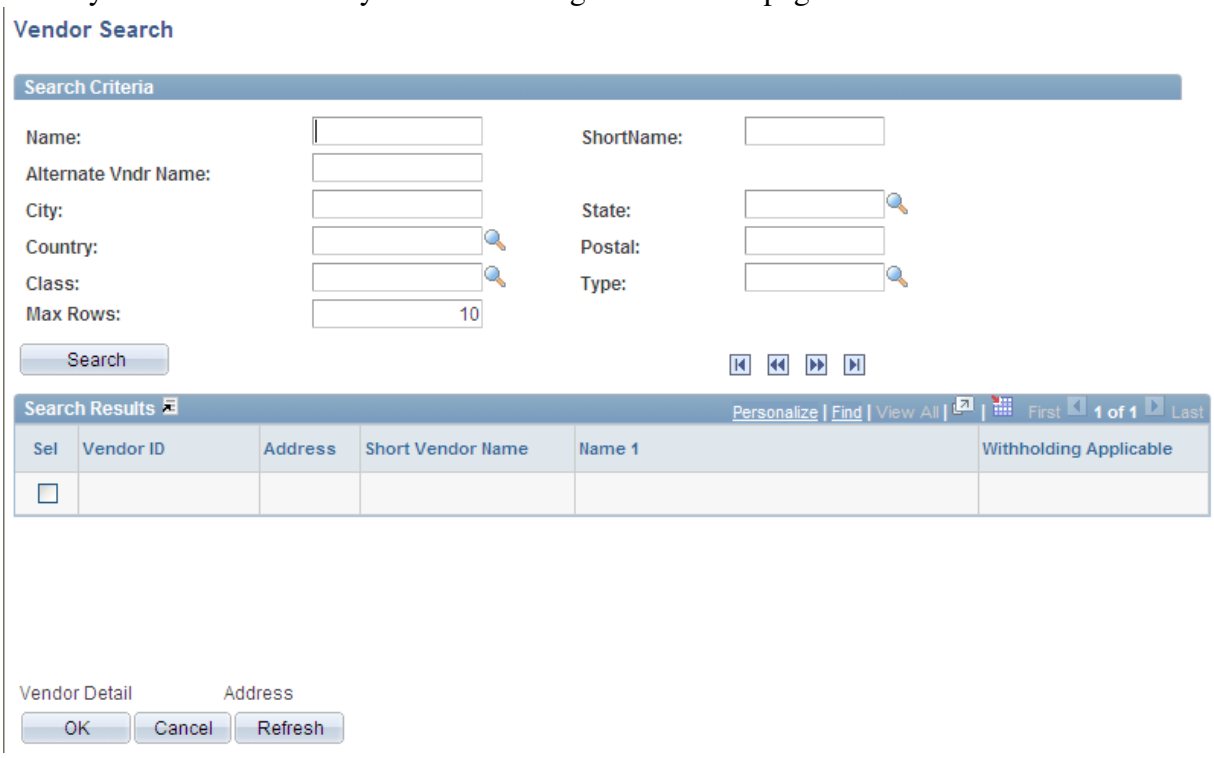
The **Vendor** field is the Vendor Short Name in Core-CT. The numbering scheme is the Vendor's Tin number followed by an alpha designator - F for FEIN number or S for Social Security or Individual Tax Payer ID, number followed by a numeric suffix generally -001.

The **Vendor ID** field is the 10 digit PeopleSoft generated ID number for the vendor.

If you do not know the Vendor Short Name or the Vendor ID number, the best way to search for the vendor is to utilize the Vendor Search link.

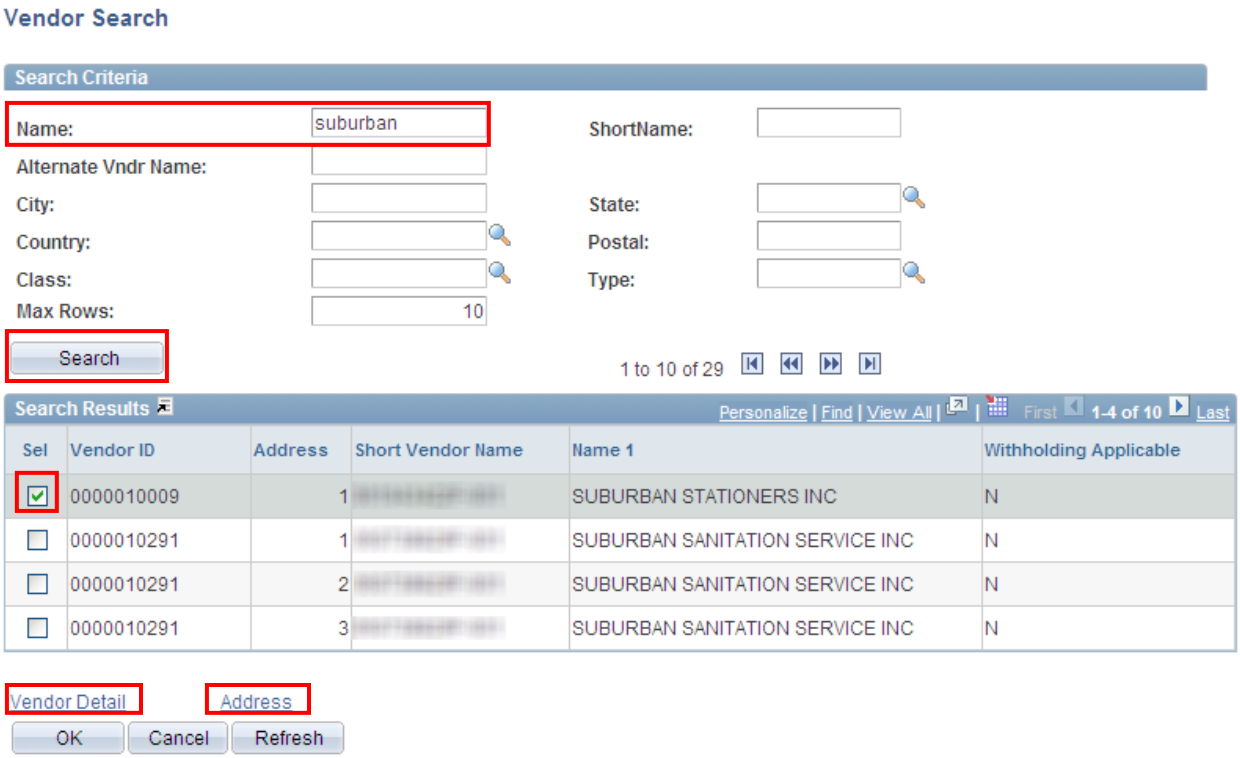


When you click on the link you will be brought to a search page for vendors.

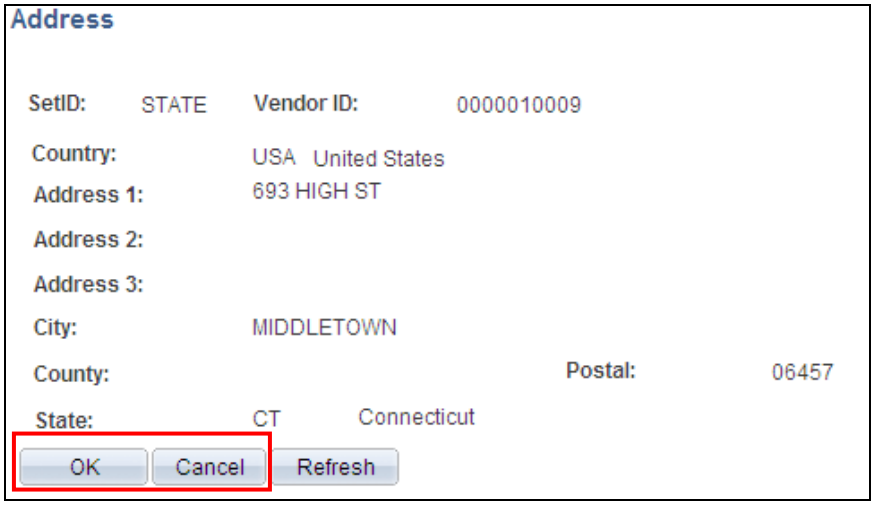


Type in all or part of the vendor name that you are searching for, and any other information, that may narrow down your vendor search. Click Search. Results returned will show in the Search Results view.

Place a checkmark in the box for the Vendor that you wish to choose.



If you are unsure of which address is the ordering address, place a check in the **Sel** checkbox next to the vendor and click the Address link.



Click OK or Cancel to return you to the previous screen.

To view information about the vendor, place a check in the **Sel** checkbox next to the vendor and click Vendor Detail.

Vendor Detail

SetID:	STATE	Vendor ID:	0000010009	Vendor Status:	Approved
Short Vendor Name:	[illegible]			Vendor Classification:	Supplier
In City Limit:				HR Class:	
Vendor Name 2:				Persistence:	Regular
Alternate Vndr Name				Open For Ordering:	Y
Address:	00001	693 HIGH ST		Withholding Applicable:	N
Corporate Vendor:	0000010009	SUBURBAN STATIONERS INC		Display VAT Flag:	N
Remit Vendor:	0000010009	SUBURBAN STATIONERS INC			

Vendor Types Personalize | Find | View All | First 1 of 1 Last

Type	Long Name

OK Cancel Refresh

Click OK or Cancel to return you to the previous screen, so you can select the vendor for the Purchase Order. This will bring the vendor data onto the Main Page.

Maintain Purchase Order

Purchase Order

Business Unit: DOTM1
PO ID: NEXT
Copy From:

PO Status: Open
Budget Status: Not Chk'd
Hold From Further Processing

*PO Date: 02/14/2013 Vendor Search
*Vendor: Vendor Details
*Vendor ID: 0000010009 SUBURBAN STATIONERS INC
*Buyer: TurbertJ DOT-TURBERT Julie
PO Reference:

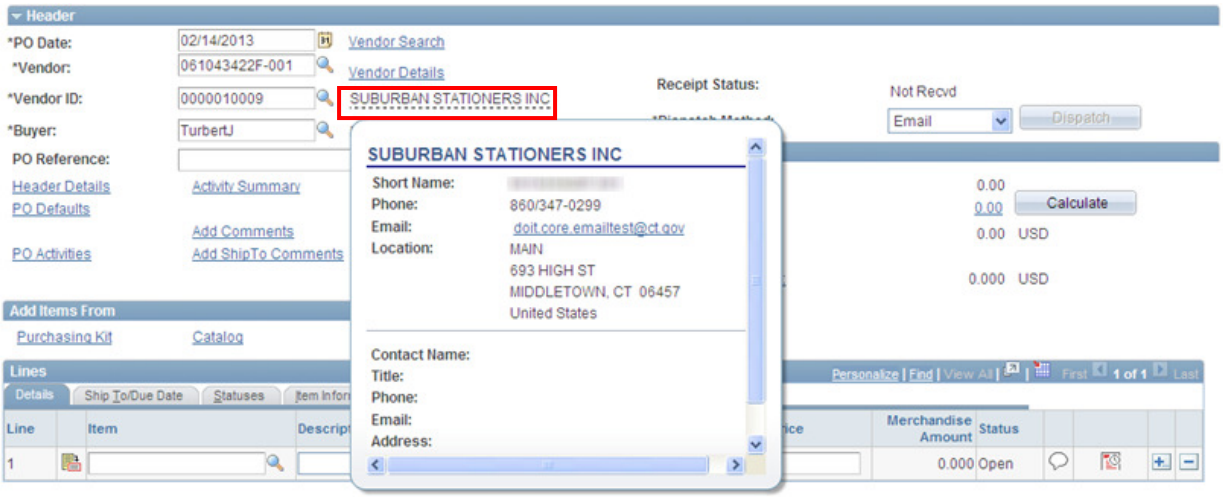
Header Details Activity Summary
PO Defaults
Add Comments
PO Activities Add ShipTo Comments

Receipt Status: Not Recvd
*Dispatch Method: Email Dispatch

Amount Summary

Merchandise:	0.00	
Freight/Tax/Misc.:	0.00	Calculate
Total Amount:	0.00	USD
Total PO Obligation:	0.000	USD

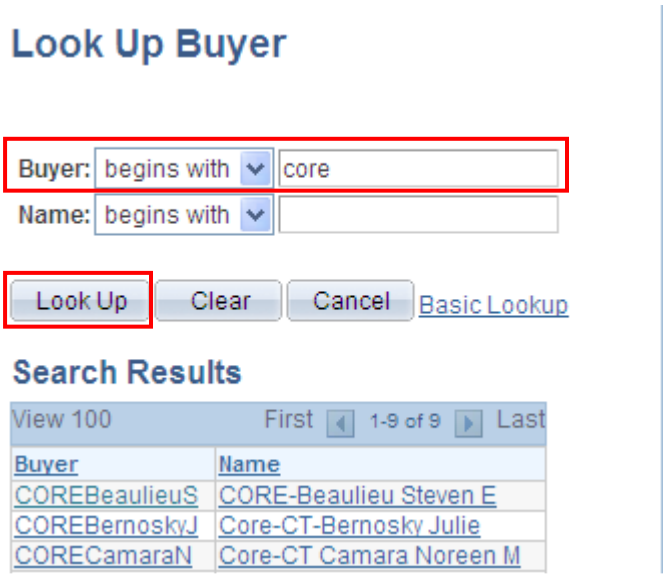
If you hover your cursor over the vendor name, you can view basic information regarding that vendor.



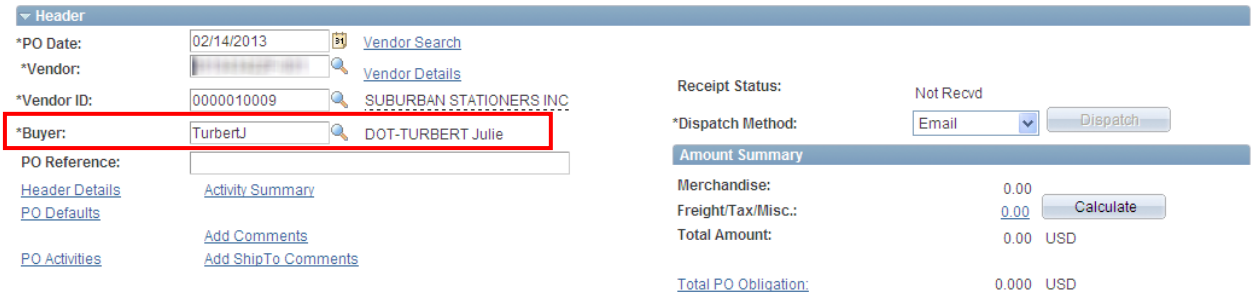
If the vendor does not exist in the Core-CT system, please contact OSC for the necessary forms to request an addition to the vendor file.

Buyer - If the Buyer information does not default in, you can enter part of the buyer's last name and click the look up icon to look up the Buyer.

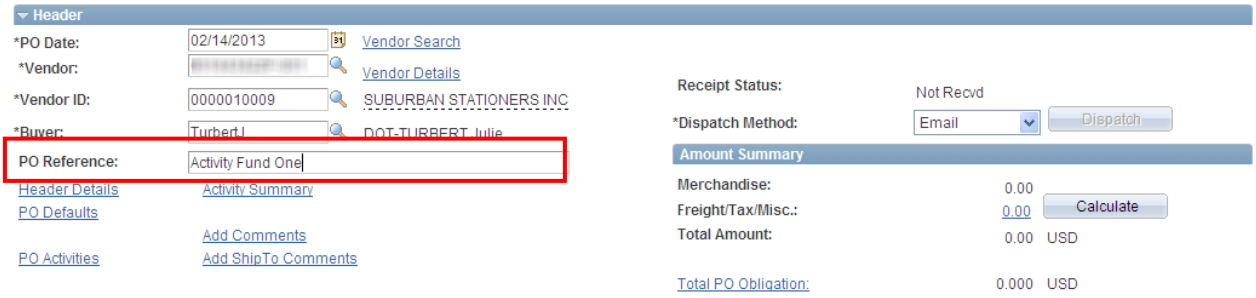
Note: Do not change the Buyer once a PO has been vouchered. Doing so changes the department ID in the distribution line after the time when chartfield changes are allowable.



Select the **Buyer** by clicking on the Buyer's name, the Buyer information will be brought into the Purchase Order.

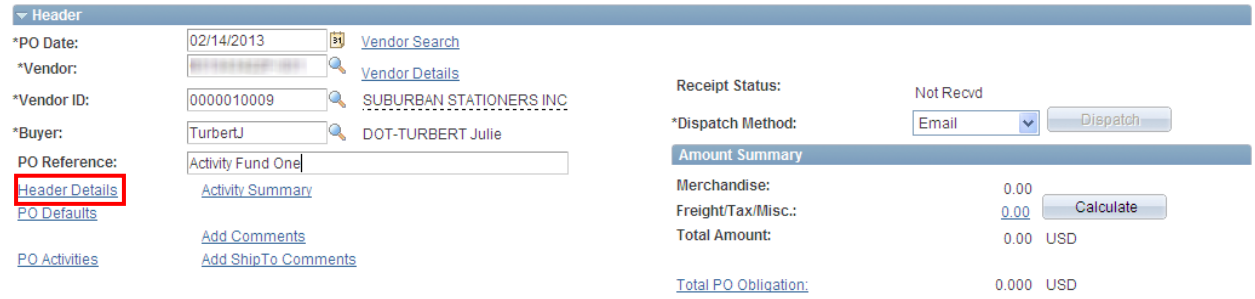


PO Reference – Optional field – 30 Character maximum

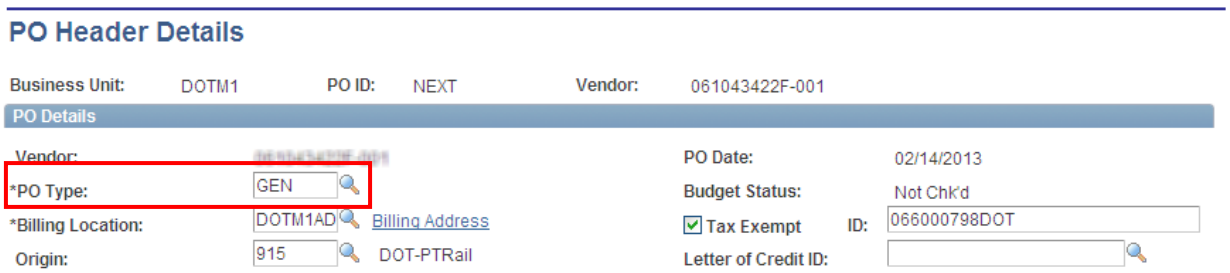


Header Details:

Click on the Header Details link.



Select the **PO Type**



You need to verify the correct **PO Type**. The default is General. Core-CT has a number of values in this field and you need to ensure that you select the correct one for your purchase. Either type in the contract type or click the icon.

Look Up PO Type

PO Type: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-19 of 19 Last

PO Type	Description
BLKT	Blanket PO
BUA	BU Award
CON	Construction
GEN	General
GL	General Letter
GRT	Grant
LOAN	Loan
MA	Master Agreement
MLYR	Multi-year PO
MOU	MOU
POC	POS Competitive
PON	POS Noncompetitive
PSC	PSA Competitive
PSN	PSA Noncompetitive
RL	Rental Lease
ROW	Right Of Way
SCS	Statutory Contractual Services
ST	Standardization Transaction
UFA	Utility/Force Account

BLKT: Blanket PO - This purchase order type could be used for Utility, Heating Oil, Gas or Postage type purchases, in addition to purchases under CT general statutes. If the purchase utilizes a CT General Statute, list the statute number in the line comments for audit purposes.
BUA: Business Unit – This purchase order type is for a contract that an agency establishes based on statutory purchasing authorities or delegated statutory purchasing authorities. It is restricted to an individual agency.

CON: Construction - This purchase order type should be used in conjunction with construction contracts.

GEN: (Default Value) General – This purchase order type can be used for Business Unit Awards, State Wide Contracts, GSA "General Service Awards" Federal Contracts, and CT General Statutory POs. If the purchase utilizes a CT General Statute or a GSA

contract, you should, in the line comments, list the statute number or the federal contract number for audit purposes.

GL: General Letter – Used when the CT Purchasing Authority is equivalent to:

GL71a	GL71b	GL71c	GL71d
GL71e	GL71f	GL71g	

GRT: Grant - This purchase order type should be used in conjunction with grant contracts.

LOAN: Loan - This purchase order type should be used in conjunction with loan contracts.

MA: Master Agreement – This purchase order is used for goods or services resulting from an RFP (Request for Proposal).

MLYR: Multi-Year - This PO type can be used for POs that an agency would like to use to cover multiple years, such as copier rentals.

MOU: Memorandum of Understanding - This purchase order type should be used in conjunction with a contract previously known as a Memorandum of Understanding or Memorandum of Agreement.

POC: POS Competitive - This value should be used by the Social Service Agencies for their Purchase of Services contracts *that were competitively bid*. (This replaces POS)

PON: POS Noncompetitive - This value should be used by the Social Service Agencies for their Purchase of Services contracts *that were not competitively bid*. (This replaces POS)

PSC: PSA Competitive - This value should be used by any agency for Personal Service Agreement contracts *that were competitively bid*. (This replaces PSA)

PSN: PSA Noncompetitive - This value should be used by any agency for Personal Service Agreement contracts *that were not competitively bid*. (This replaces PSA)

RL: Rental Lease - This purchase order type should be used in conjunction with Building Leases and Real Property.

ROW: Rights of Way - This purchase order type should be used in conjunction with Right of Way contracts.

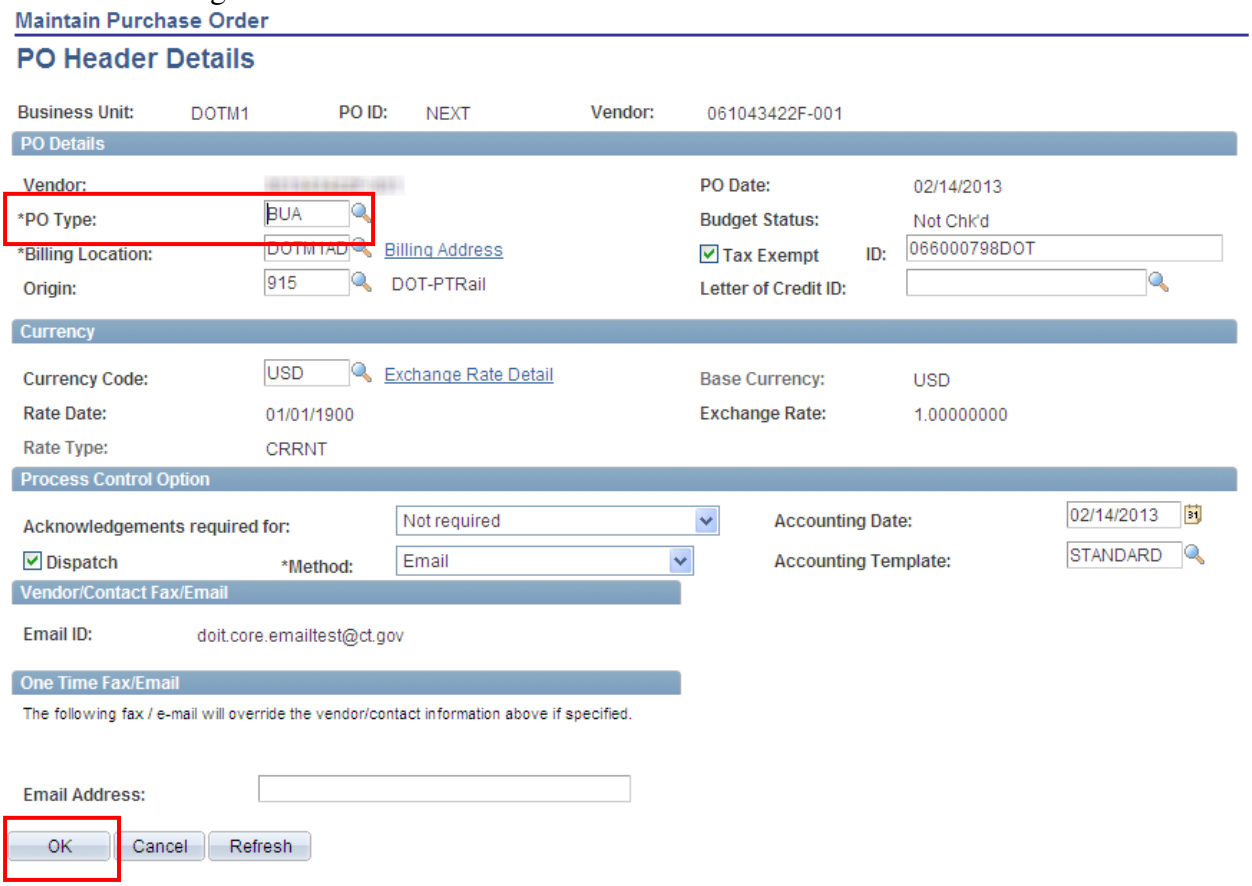
SCS: Statutory Contractual Services – This value should be used by DAS, DCS, and DOT only for their statutory contractual services contracts (OPM Statutory Ref 4D-2)

ST: Standardization Transaction – This is to be used when requesting the waiver of the bid or proposal requirement in accordance with CGS 4a-58. **Approval must be obtained by DAS before using this value.**

UFA: Utility Force Account – This is used by DOT only.

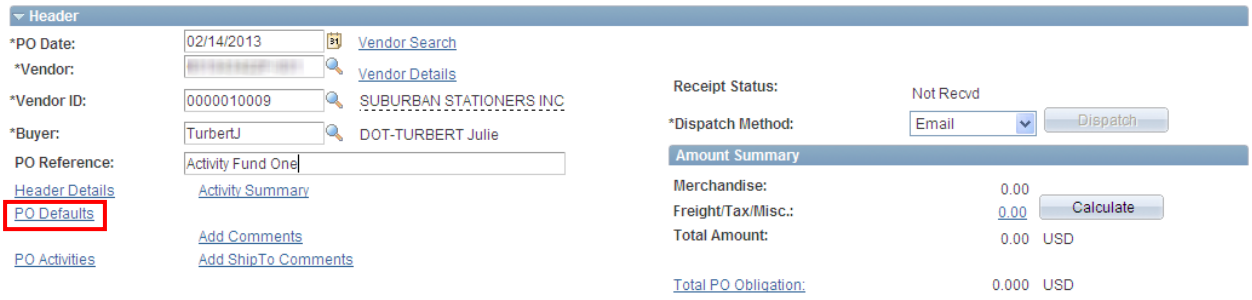
Important Note: Agencies that use POC/N, PSC/N and SCS contracts should create one purchase order for a given contract by copying that contract in to the PO. OPM requires that that same PO be used for the entire life of the contract.

After selecting the appropriate **PO Type,** click OK and you will be returned to the PO Main Page.



PO Defaults:

Click on the PO Defaults Link



The Default option should be Override.

Do Not Enter PO Defaults if your PO was copied from a POC/N, PSC/N or SCS contract. The defaults will copy over from the contract distribution line.

You can enter in a default **Category** and **Unit of Measure** under the Line heading.

Enter your default **Ship To**, **Due Date**, and Distributions for this PO.

If this is an amount only Purchase order, you can click the arrow in the **Distribute By:** field and choose Amount

Note: You will have the option to change any of this information at the line detail, if necessary.

Maintain Purchase Order

Purchase Order Defaults

Business Unit: DOTM1 PO ID: NEXT Vendor:

Default Options

Default — If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override — If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category: 44000000 Unit of Measure: CT

Schedule

Ship To: 0930000057 DOT-Rail Operations New Haven Ultimate Use Code:

Due Date: 02/14/2013 Original Promise Date:

Ship Via: COMMON Freight Terms Code: FOB DEST

Arbitration: Freight Charge Method:

Distribute By: Quantity (Amount) One Time Address

Distribution

SpeedChart:

Distributions — Personalize | Find | View All | First 1 of 1 Last

Chartfields | Asset Information

Dist	Percent	GL Unit	Fund	Dept	SID	Program	Account	ChartField 1	ChartField 2	Bud Ref
1		STATE	12001	DOT57781	10020	00000	54060			2013

OK Cancel Refresh

Click OK when you are done.

If you add PO Defaults **after** PO Lines are created, you will receive the following message:

Maintain Purchase Order

Retrofit field changes to "all" existing PO lines/schedules/distributions.....

Business Unit: DOTM1 **PO ID:** NEXT **Vendor:** 061043422F-001

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.
Select 'Apply to All Distribs' to apply changes to all distribution lines on the PO.

Retrofit Field Selection — Personalize | Find | View All | First 1-7 of 18 Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
☐		Category ID	00051	
☐		Unit of Measure	CT	
☐		Ship To	0930000057	
☐		Due Date	2013-02-14	
☐		Ship Via	COMMON	
☐		Freight Terms Code	FOB DEST	
☐	1	Pct	100	

☑ Select All ☐ Clear All

OK Cancel Refresh

Make the necessary selections for this PO.

Note that only the first 7 lines of information are visible. To see all lines, click View All, then select which lines you want to update.

If you wish to apply the coding to all distribution lines, you will need to check the box on the right under "Apply to All Distribs".

Business Unit: DOTM1 **PO ID:** NEXT **Vendor:** [redacted]

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.
Select 'Apply to All Distribs' to apply changes to all distribution lines on the PO.

Retrofit Field Selection Personalize | Find | View 7 | First 1-18 of 18 Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
☑		Due Date	2013-02-14	
☑		Ship Via	COMMON	
☑		Freight Terms Code	FOB DEST	
☑	1	Pct	100	
☐	1	GL Unit	STATE	☑
☐	1	Fund	12001	☑
☐	1	Dept	DOT57781	☑
☐	1	SID	10020	☑
☐	1	Program	00000	☑
☐	1	Account	54060	☑
☐	1	Bud Ref	2013	☑
☐	1	PC Bus Unit	NONPC	☑
☐	1	Project	DOT_NONPROJECT	☑
☐	1	Budget Date	2013-02-14	☑
☐	1	Location	ACORE	☑

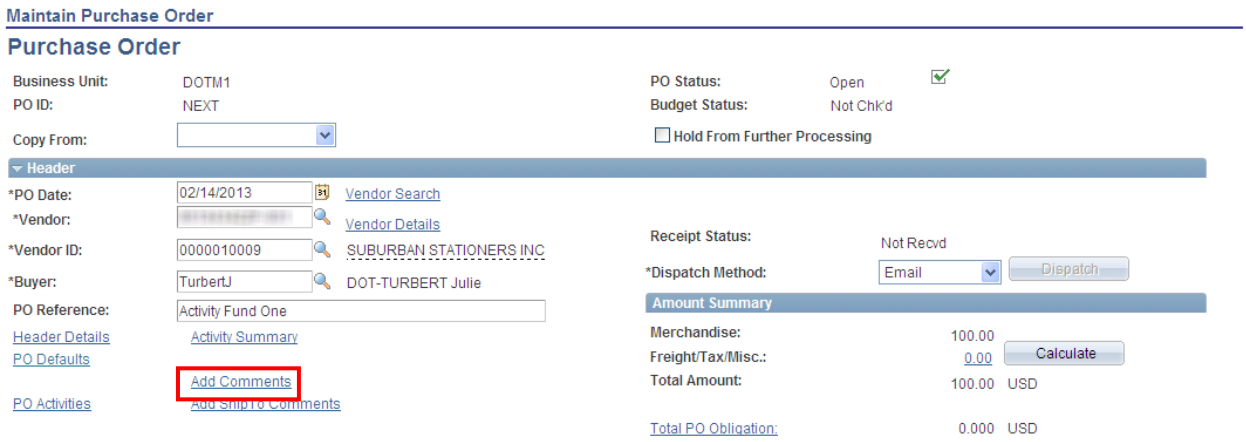
☑ Select All ☐ Clear All

OK Cancel Refresh

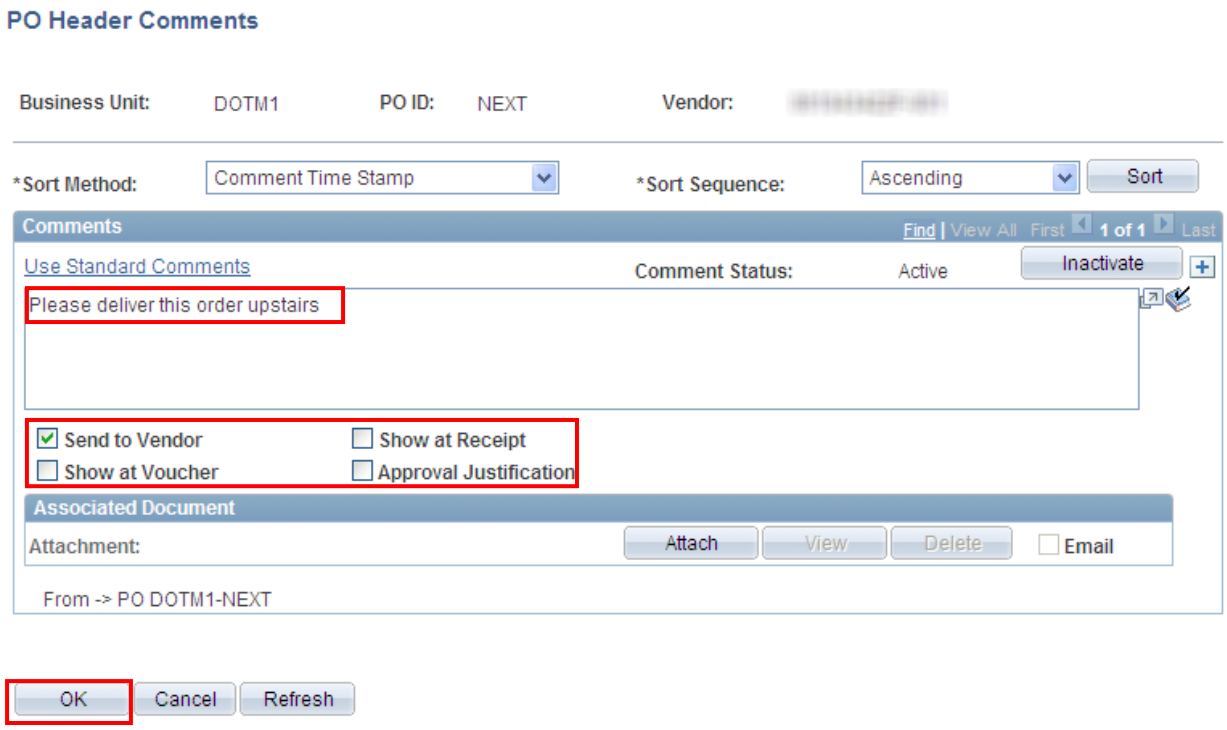
Click OK when you are done.

Entering Comments:

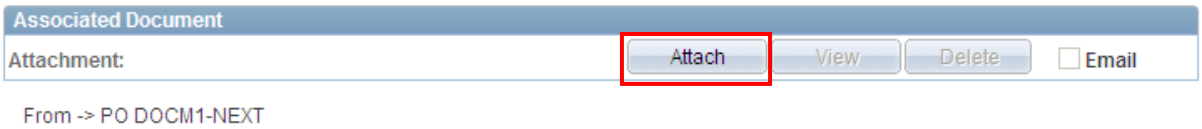
Select the Add Comments Link if you wish to enter Header Comments for this PO.



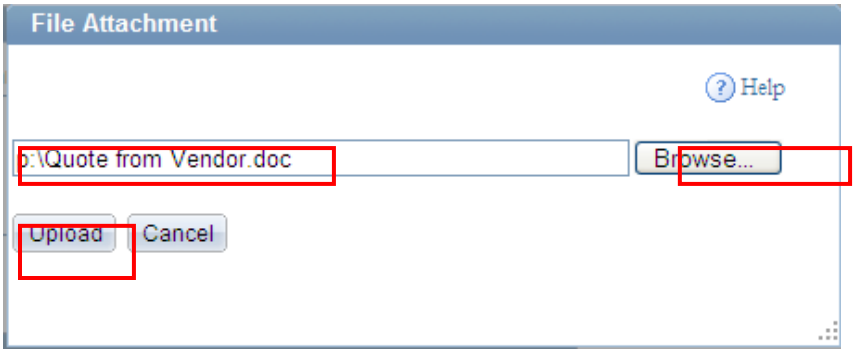
Add your comments and click the appropriate action, such as **Send to Vendor**, **Shown at Receipt**, **Show at Voucher** or **Approval Justification**. Click OK when you are done.



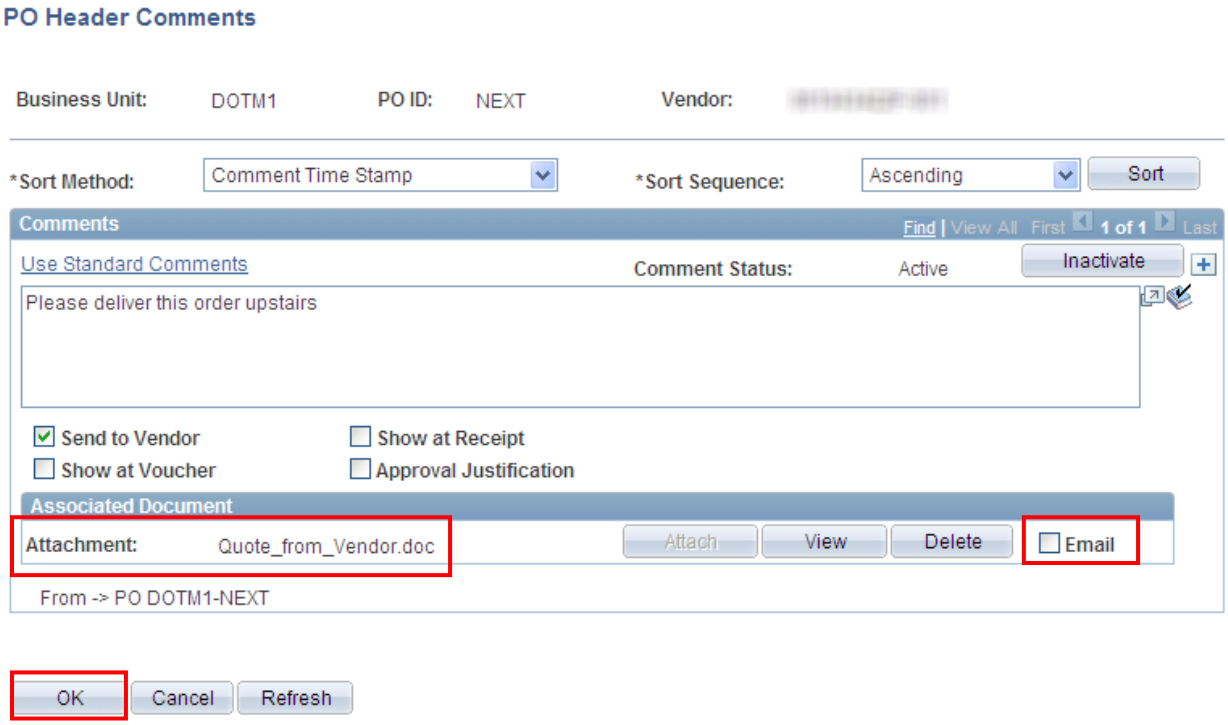
If necessary, you may attach an associated document with this purchase order (i.e. quote). Click Attach.



Click Browse... when the new screen opens and search for the document you wish to attach. Then click Upload to attach it to the purchase order.



The file is listed as an attachment. If necessary, you can view or delete it.



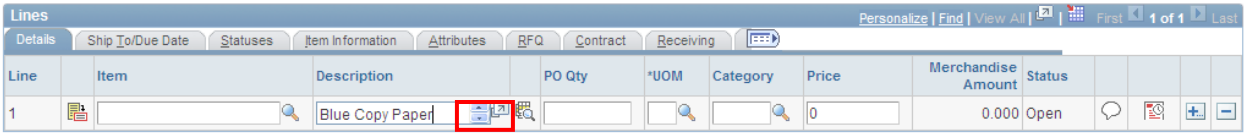
Click OK when you are done. You will be returned to the Main Page.

Note: If you want to email the attachment along with the purchase order, you must check the Email Box to the right!

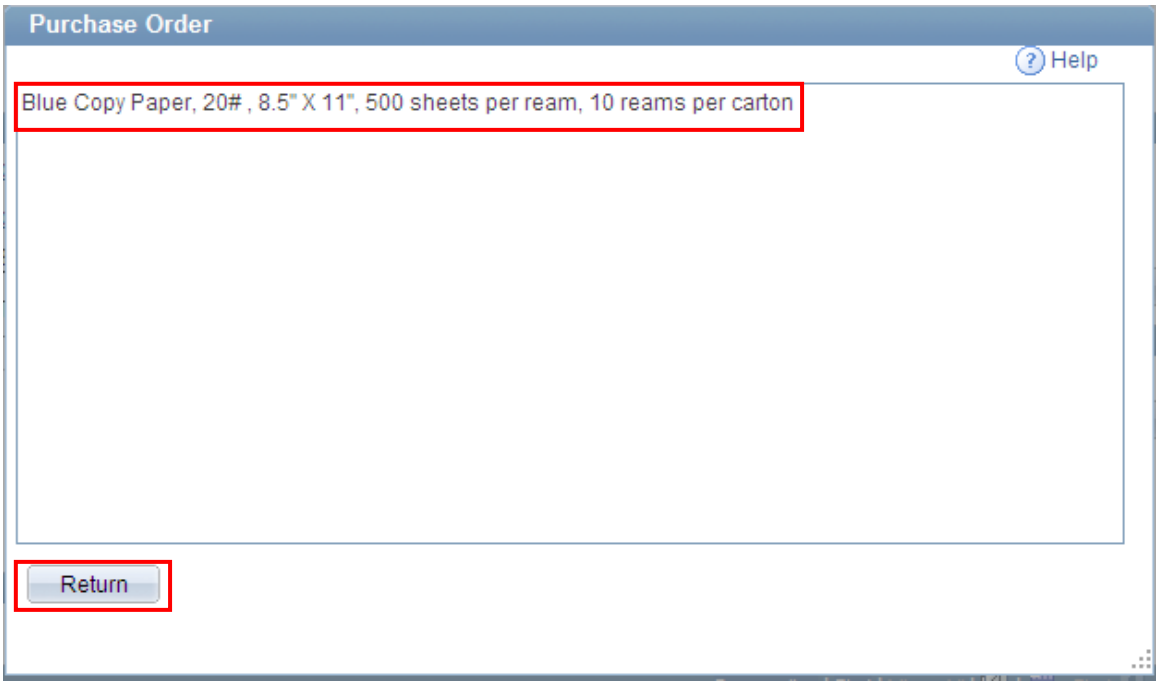
The link will show as Edit Comments on the header page, if you have added a comment.

Enter information on the Line:

Enter this information on the line before clicking in to the line details.



Enter the **Description** for the good/service. If your description exceeds 19 characters you can use the scrolls to view or click on to open an expanded view window.



Click Return to close the window and return back to the main page.

Enter the **Quantity** ordered.

Enter the **UOM** (unit of measure). If you are unsure of the unit of measure click the search icon. If you have entered a UOM default in the PO Defaults, you can skip this step.

Look Up UOM

Unit of Measure: begins with C

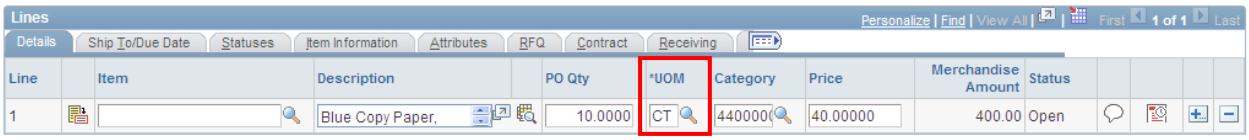
Look Up | Clear | Cancel | Basic Lookup

Search Results

View 100 First 1-38 of 38 Last

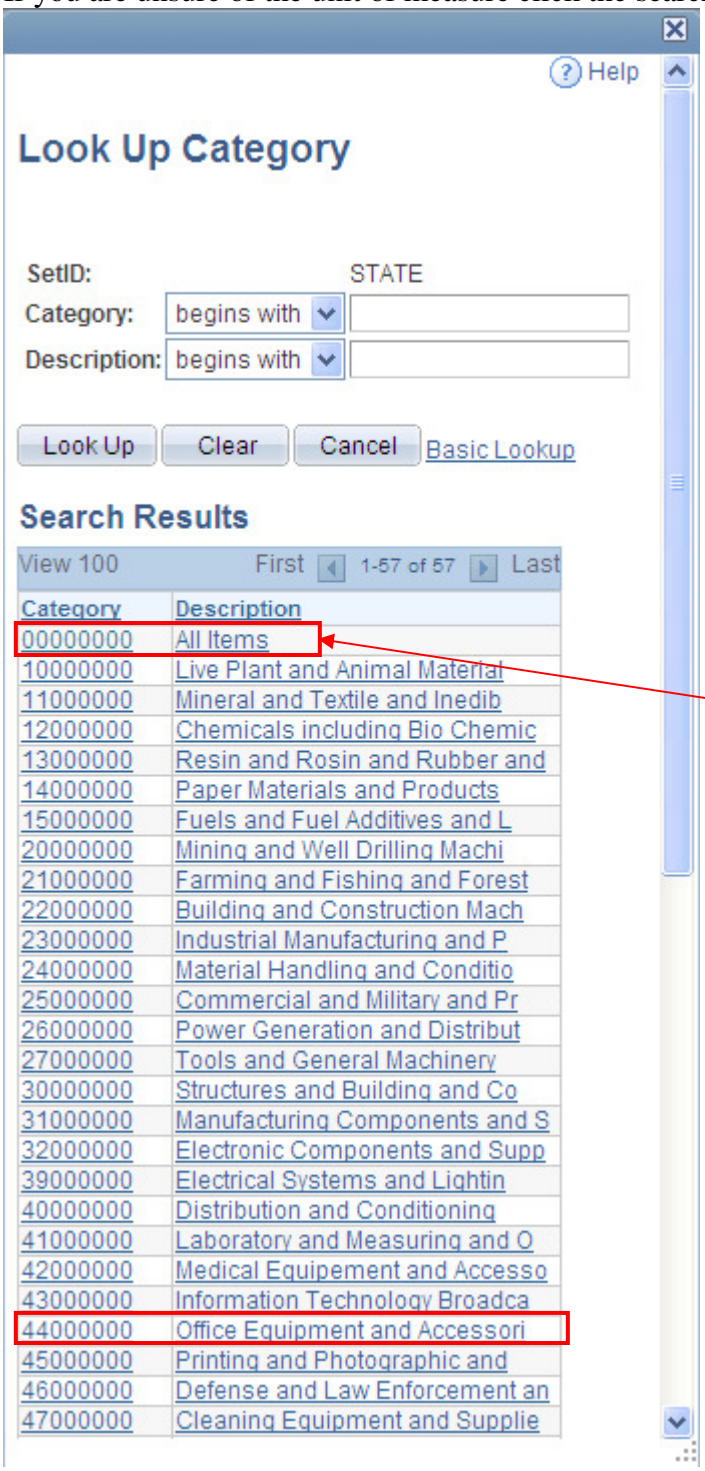
Unit of Measure	Description	Short Description
C0	Calls	Calls
C1	Composite Product Lbs (Weight)	CompProdLb
C2	Carset	Carset
C3	Centiliter	Centiliter
C4	Carload	Carload
C5	Cost	Cost
C6	Cell	Cell
C7	Centipoise (CPS)	Centipoise
C8	Cubic Decimeter	Cubic Deci
C9	Coil Group	Coil Group
CA	Case	Case
CB	Carboy	Carboy
CC	Cubic Centimeter	Cubic Cent
CD	Carat	Carat
CE	Centigrade, Celsius	Centigrade
CF	Cubic Feet	Cubic Feet
CG	Card	Card
CH	Container	Container
CI	Cubic Inches	Cubic Inch
CJ	Cone	Cone
CK	Connector	Connector
CL	Cylinder	Cylinder
CM	Centimeter	Centimeter
CMM	Cubic Millimeters	Cubic Mill
CN	Can	Can
CO	Cubic Meters (Net)	Cubic Metr
CP	Crate	Crate
CQ	Cartridge	Cartridge
CR	Cubic Meter	Cubic Mete
CS	Cassette	Cassette
CSE	Case Name	Case Name
CT	Carton	Carton
CU	Cup	Cup

Click on the unit of measure to return back to the main page.



Enter the appropriate **Category**.

If you are unsure of the unit of measure click the search icon.



If you have entered a Category in the PO defaults, you can skip this step.

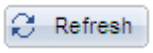
Choosing the category will activate the allowable tolerances as well as bringing in the account associated with this category onto the distributions page.

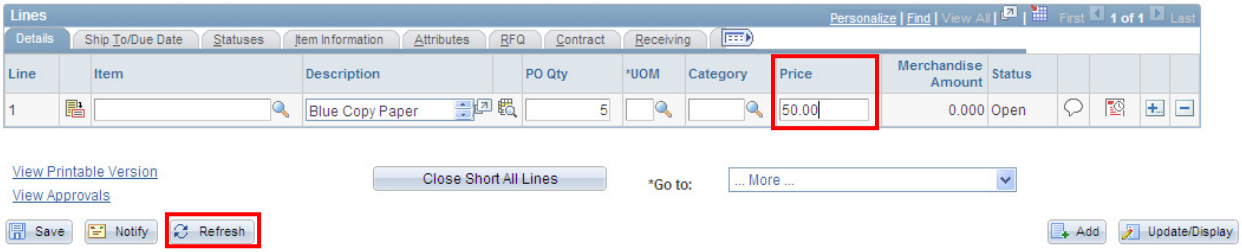
Use of the category 00000000 or CT_UNSPCC is unacceptable on any contract or PO.

These values were included for use by requesters on requisitions if they did not know the correct category, and it is the responsibility of the approvers to apply the correct category code.

Click on the category to return back to the main page.

Enter the **Price**.

If you have entered in a default category and UOM, enter in the price and press the Enter key or click  to pull in the defualt values.



The UOM and Category field update with the default values.

Click on the **Line Details Icon**  located to the left of the line of the PO that you want to work on. This will open the details for this line.

Maintain Purchase Order

Details for Line 1

PO ID: NEXT
Vendor:
Line: 1
Item ID: paper

Line Details

Category: 44000000
Description: Office Equipment and Accessori
Category ID: 00051
Amount to Receive: USD
Quantity to Receive:

Line Status: Open
Backorder Status: Not Backordered
Purchasing Authority: Contracts

Amount Summary

Merchandise Amount: 100.00 USD
Doc. Base Amt: 100.00 USD

Transaction Item Description:
Blue Copy Paper, 20#, 8.5" x 11", 500 sheets per ream, 10 reams per carton

Preferred Language Item Description:

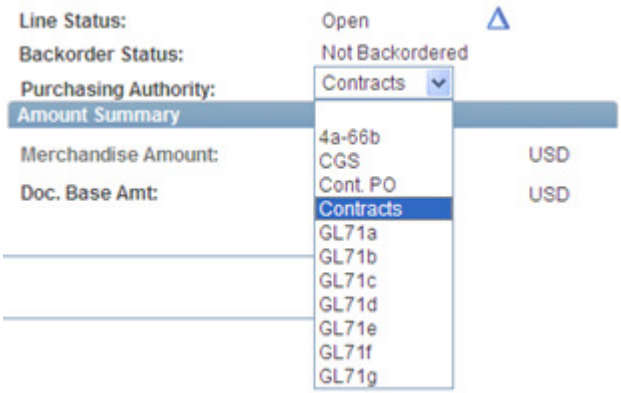
Expand All Collapse All

Item Information
Attributes
RFQ
Contract
Receiving

OK Cancel Refresh

Note: You can view the item full item description here as well.

Select the **Purchasing Authority**:



Click on the appropriate Purchasing Authority.

The current values in the drop down list are:

4a-66b: Connecticut General Statute allowing the purchase from Federal GSA contract. **Prior approval must be obtained from DAS. In the line comments the GSA contract number must be input.**

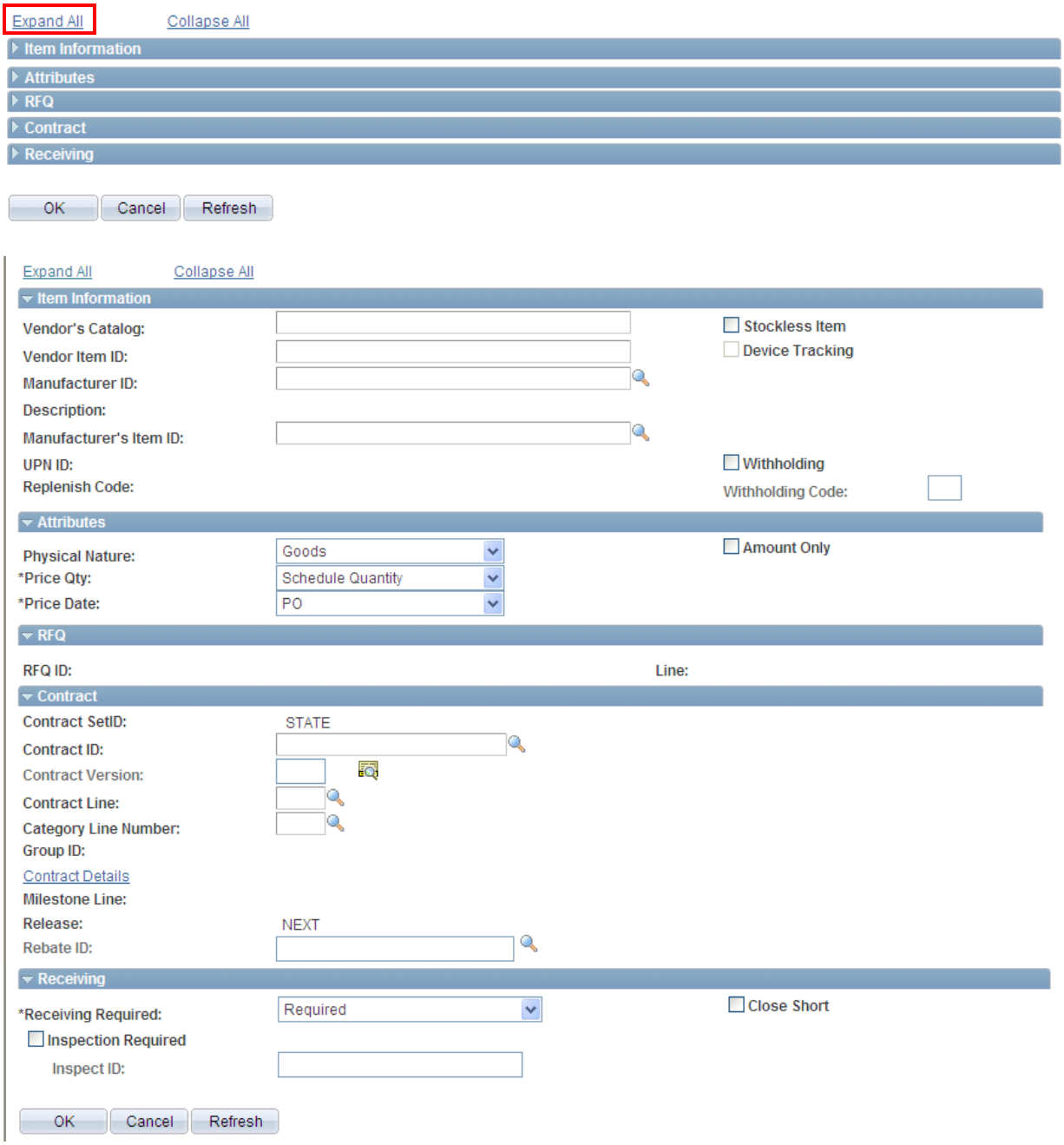
CGS (Connecticut General Statute): **When this value is selected users are advised to list the appropriate statute in the line comments field.** This authority is used with the PO Type GEN or BLKT.

Cont PO (Continuous Purchase Order): To be used for online purchase orders that are continuous and the contract has expired, but a purchase order was already in place. Be sure to reference the Contract ID in the Description and/or Header Comments. This would be used with PO Types GEN or MLYR.

Contracts: (Default Value): When this value is selected, users must also fill in the appropriate contract number in the **Contract ID** field. The PO Type can be: CON, GEN, GRT, LOAN, MLYR, MOU, PSA, POS, RL, POC/N, PSC/N, ROW, SCS, UFA, MA or ST. **NOTE: You may combine GL and Contracts purchasing authorities within one purchase order – the PO Type would be GEN.**

GL71a: General Letter 71a, this value should be used with PO Type GL.
GL71b: General Letter 71b, this value should be used with PO Type GL.
GL71c: General Letter 71c, this value should be used with PO Type GL.
GL71d: General Letter 71d, this value should be used with PO Type GL and BLKT (blanket).
GL71e: General Letter 71e, this value should be used with PO Type GL.
GL71f: General Letter 71f, this value should be used with PO Type GL.
GL71g: General Letter 71g, this value should be used with PO Type GL.

Click the Expand All link to access all line detail information.



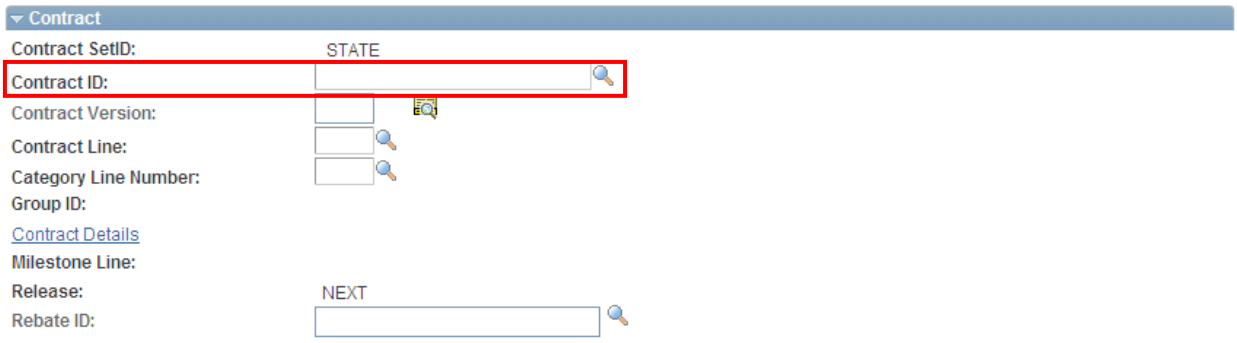
The following fields should be updated:

Physical Nature should be verified, options are Goods or Services. The Default Value is Goods. The value of Goods is based on the category and should be changed **after** the category is selected if necessary.

The **Amount Only** checkbox should be selected if this to be an Amount Only PO.

If this checkbox is selected, the distributions must also be distributed by Amount, not Quantity.

Contract ID: Contract ID is a required field when the Purchasing Authority is Contract. Type in the Contract ID or use the look up icon to select the appropriate contract for this purchase.



Enter in the search criteria and click Look Up to view a list of possible contracts.

Look Up Contract ID

SetID: STATE
Contract ID: begins with 14DOT
Short Vendor Name: begins with
Description: begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results

View 100 First 1-3 of 3 Last

Vendor Set ID	Vendor ID	Contract ID	Short Vendor Name	Contract Status	Description	Contract Beginning Date	Expire Date
STATE	0000010009	14DOT1112AA		Approved	All using state BUs	01/17/2013	01/30/2015
STATE	0000010009	14DOT0002AA		Approved	(blank)	01/09/2013	01/10/2014
STATE	0000010009	14DOT0001AA		Approved	(blank)	01/09/2013	01/09/2014

Click on the contract to return back to the details page.

Contract

Contract SetID: STATE
Contract ID: 14DOT0001AA
Contract Version: 1
Contract Line:
Category Line Number:
Group ID:
Contract Details
Milestone Line:
Release: NEXT
Rebate ID:

If you need information about the contract you have selected, you can click on the Contract Details link.

If your purchasing authority is Contract, the contract selected on Line 1 will populate ALL lines of the PO upon clicking save. If you need to change this value to another contract ID on one or more lines, you will need to go to the specific line of the PO and update the Line Details page for that specific line item.

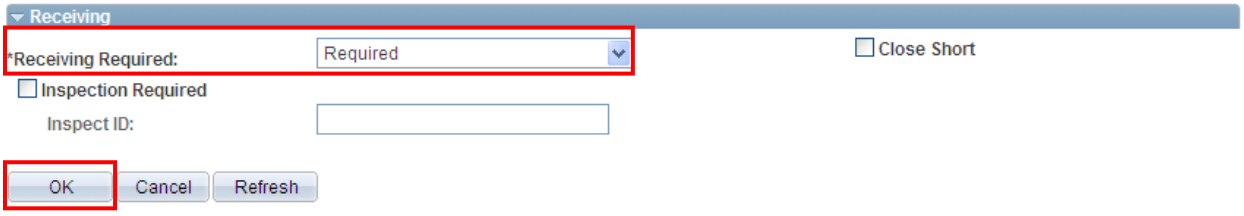
EXAMPLE: You have a 4 line PO. Two lines are for one contract, and two are for another. All four lines will default to the Contract ID entered in the line details of line 1

when you save. You must select the line details link and enter the correct Contract ID for any lines that are different than the Contract ID specified on Line 1 before you click save.

If you have combined lines with Contracts and GL on the same PO, the contract ID field for lines using GL must be blank.

Contract Line: If the contract referenced in the Contract ID field is a fixed item contract with contracts lines (POC Comp or Non-Comp; PSC Comp or Non-Comp; or SCS), the contract line field on the PO **must** contain the associated line number from the contract. If the PO is copied from a contract, the appropriate line number will populate.

Receiving Required: Receiving required is now mandatory on all purchase orders.



Inspection Required: The default value is un-checked. If the purchase is for a commodity that requires inspection of the product you need to place a check in this checkbox. This will require the goods to be inspected as part of the receiving process and will force a 4 way match requirement (PO > Receipt > Inspection > Voucher must all match).

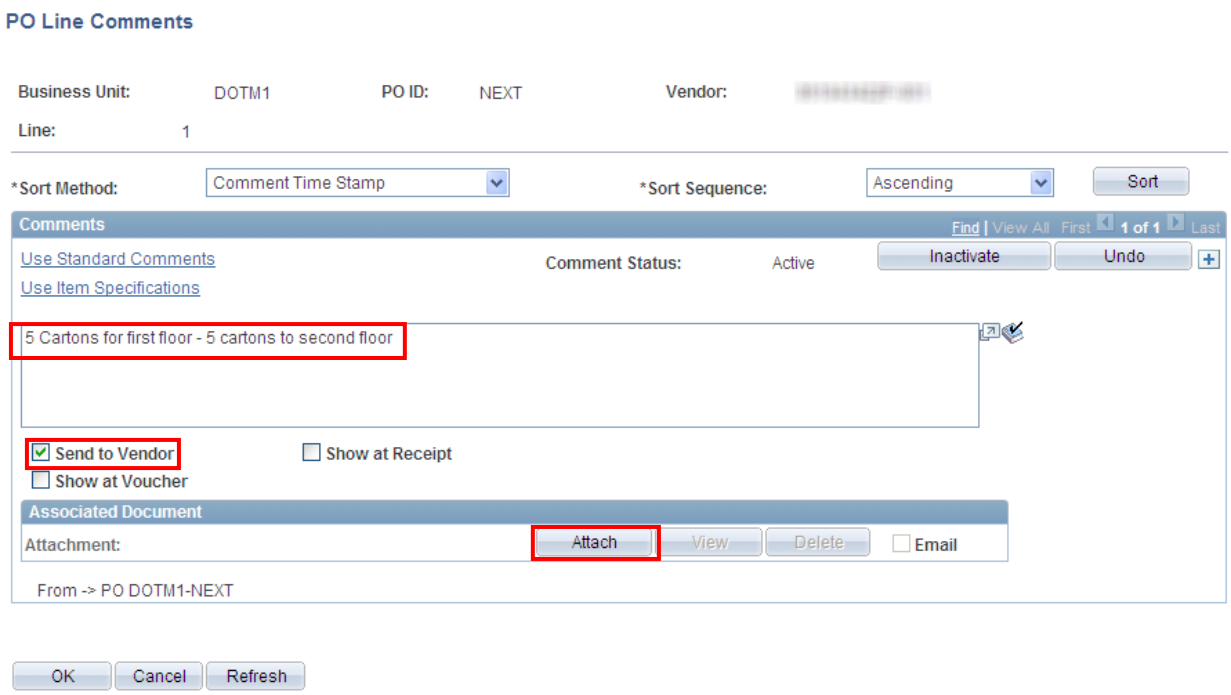
Click OK when you are done.

You will be returned to the Main Page.

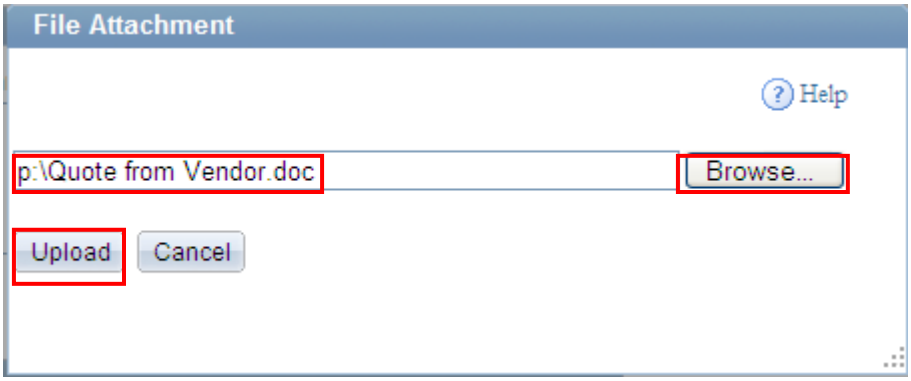
If you need to add **Line Comments**, click on the white conversation bubble.

Add your comments and click the appropriate action, such as **Send to Vendor**, **Shown at Receipt**, or **Shown at Voucher**.

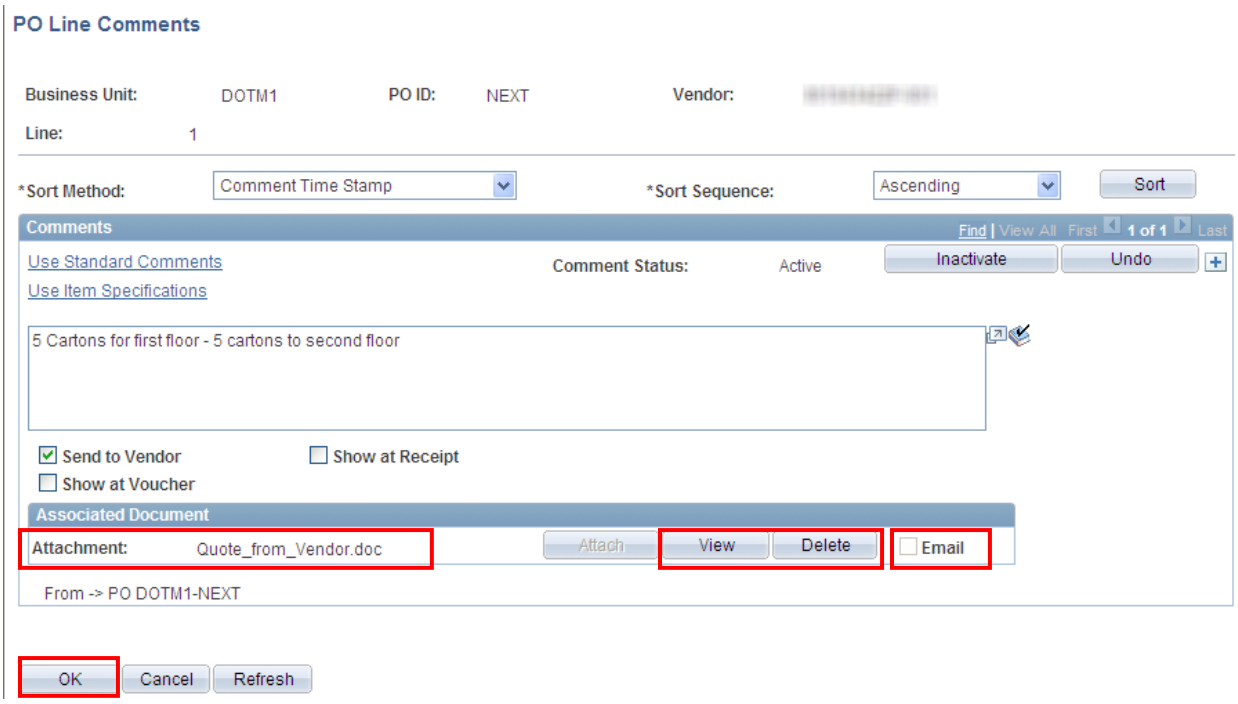
If necessary, you may attach an associated document with this line item (i.e. quote). Click Attach.



Click Browse... when the new screen opens and search for the document you wish to attach. Then click Upload to attach it to the purchase order.



The file is listed as an attachment. If necessary, you can view or delete it.



It is unacceptable to attach a listing of items that you would like to purchase to the PO, an in the description line on the PO state, "See attached list", when sending to a vendor.

Note: If you want to email the attachment along with the purchase order, you must check the Email Box to the right!

The conversation bubble will have lines in it, if you have added a comment.

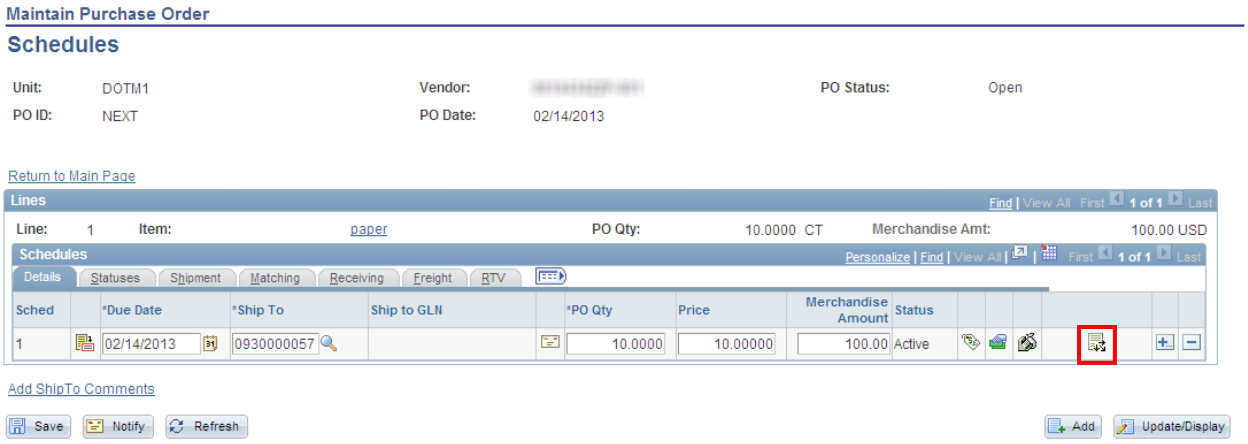
Click OK when you are done. You will be returned to the Main Page.

Click on the **Schedule Icon** located to the right of the Line Comments Icon .

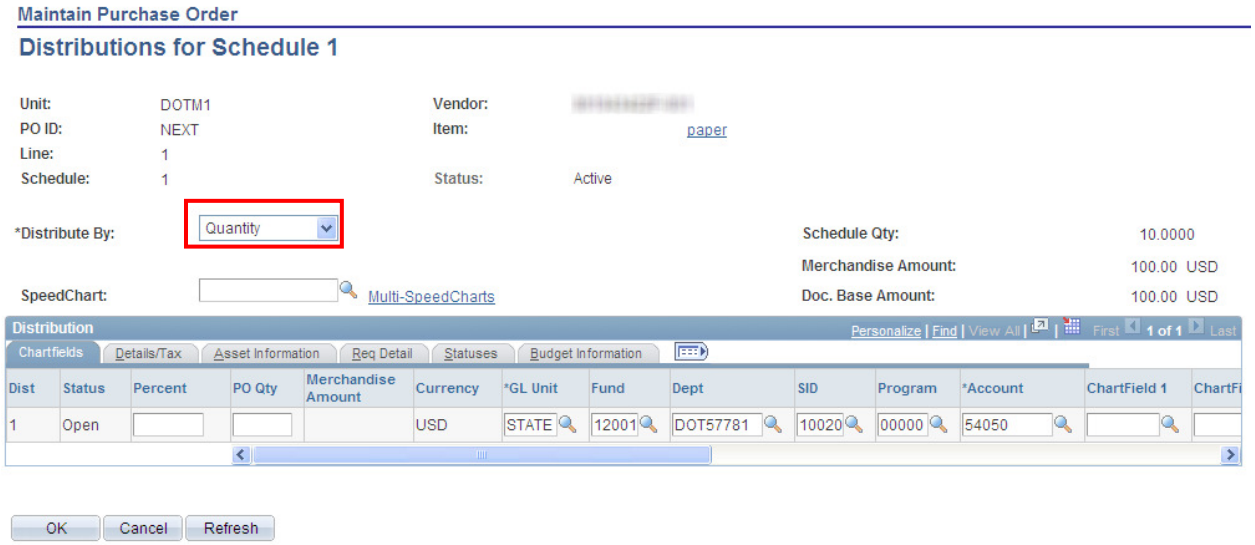
Information will default onto the Schedule Page based on the buyer; the date the PO was entered and PO line information, even if PO Defaults are not used. These fields may also default based on your entries in the PO Defaults. You can alter the **Due Date, Ship To, PO Quantity** and **Price** information for each line item.

You may add additional schedule lines, if needed, for each line item by clicking the add rows icon .

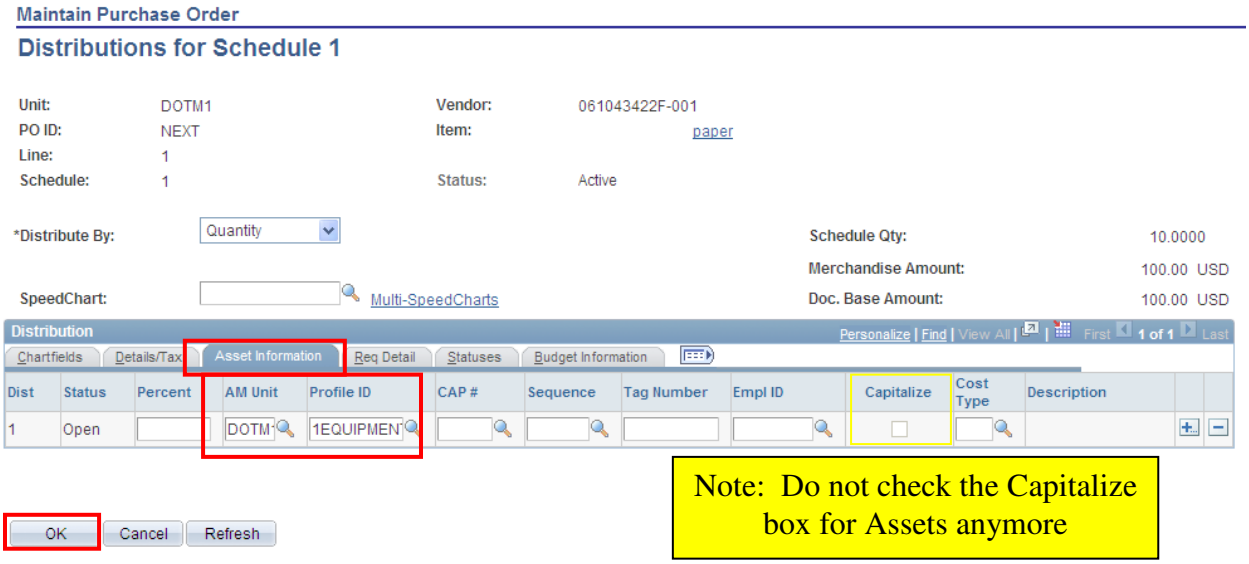
Click on the **Distributions/Chartfields Icon** to enter/view the chartfield information. This information will default in if you used the PO Defaults link on the Main Page



As a reminder, **you must select Amount in the Distribute by: field if you are creating an Amount Only purchase order**. Remember that the Default Value for this field is Quantity and must be changed to Amount, if necessary.



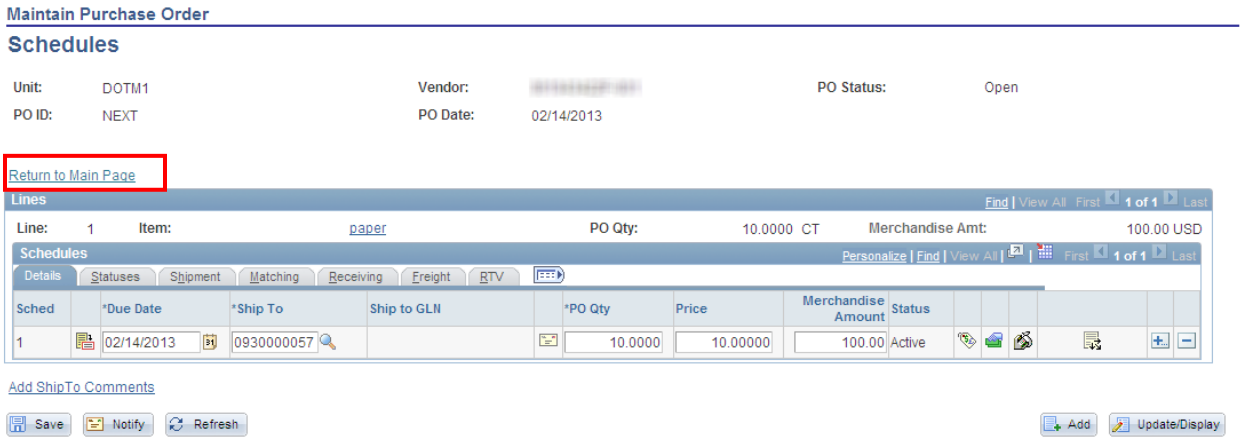
If the item you are purchasing is an Asset (using an account of **55**XXX) click on the **Asset Information** link, and select your **A**sset **M**anagement **Unit** and Asset **Profile ID**.



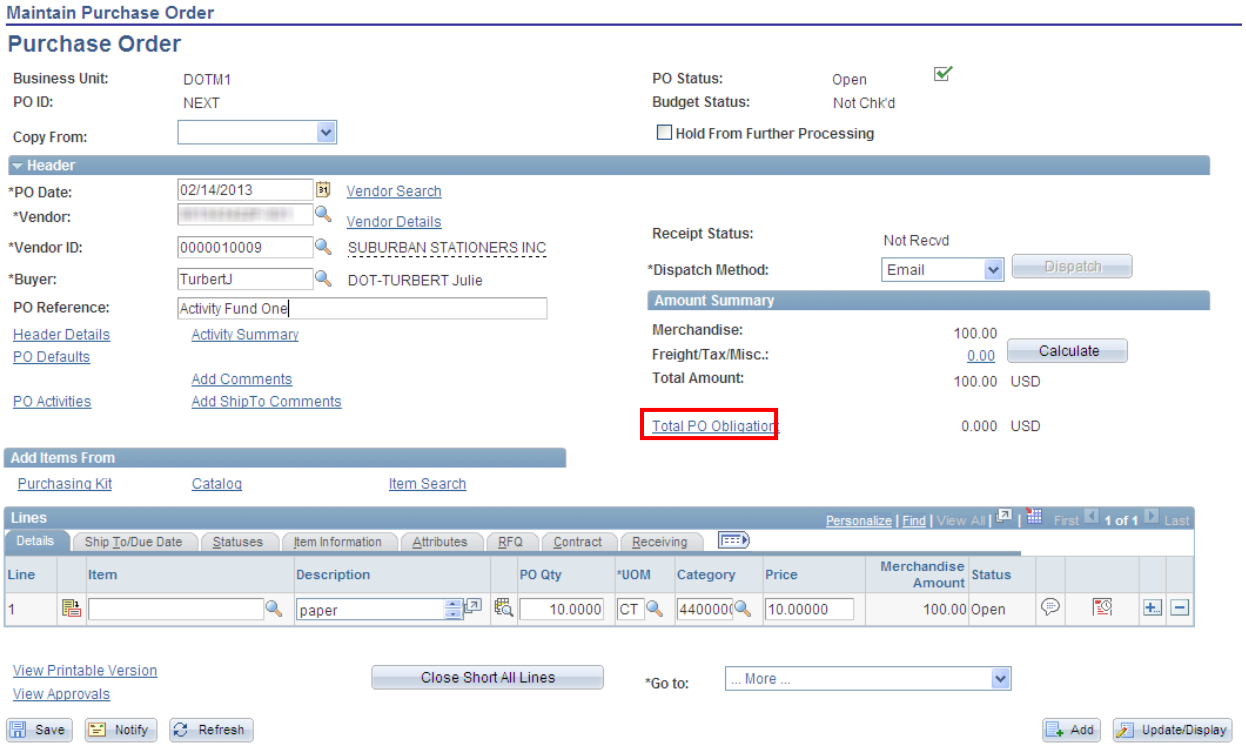
After inputting your chartfield and/or asset information, click OK.

You will be returned to the Schedules Page.

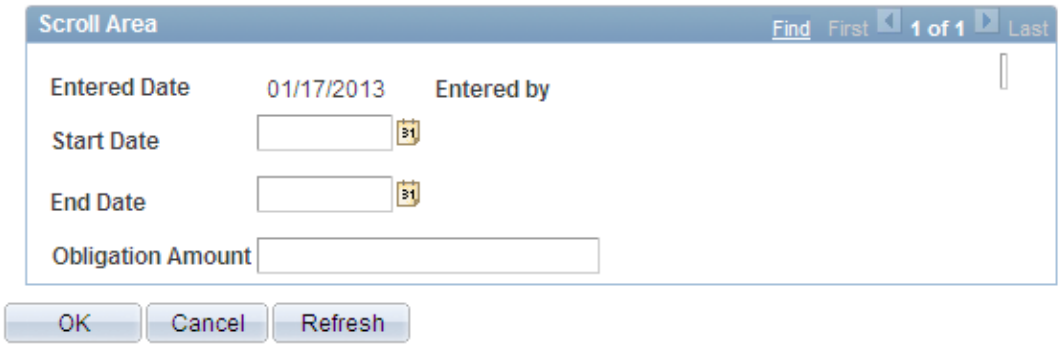
Click the Return to Main Page Link.



Once on the Main Page click on the Total PO Obligation: Link to enter your total Obligation for this Purchase Order.



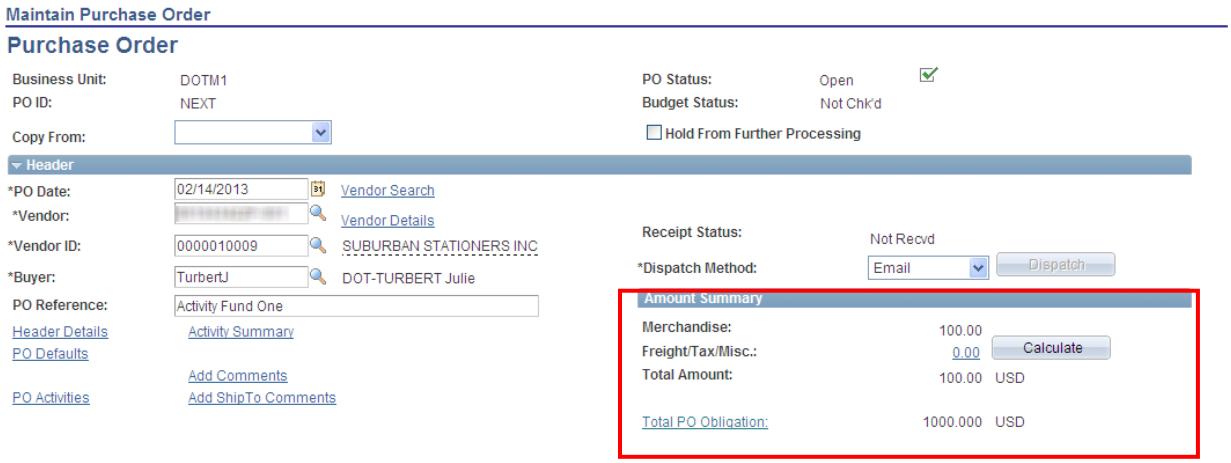
These PO Obligation fields will default in, if not manually entered when saving your PO. The start date will be the entered date, the End Date will be the last day of the Fiscal Year and the Total Obligation Amount will be the total amount of the PO.



If this PO is associated with a contract enter start and end dates that are the same as the terms of the contract.

If you are obligated to this vendor for $1000.00 and your PO amount is only $250.00 (ex. first quarter commitment), your Total Obligation Amount of $1000.00 must be entered.

Each time you change the dollar amount of your PO, whether it is a reduction or an increase of the amount, you must change your Total Obligation if your obligation to the vendor is also changing.

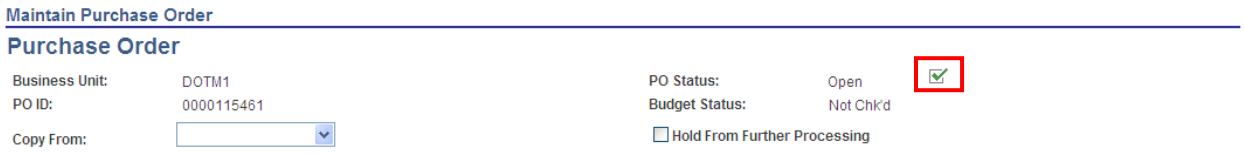


NOTE: If you need to change the obligation amount for any reason after the

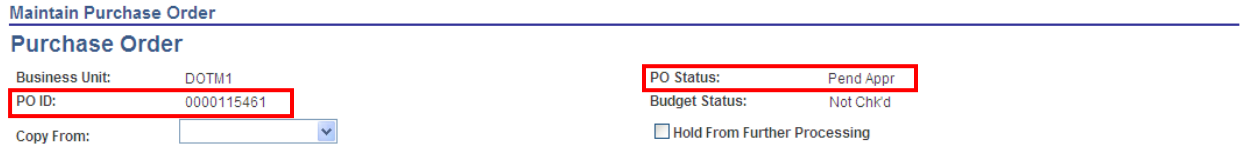
Once you have entered this information click OK.

You will return to the Main Page of the PO.

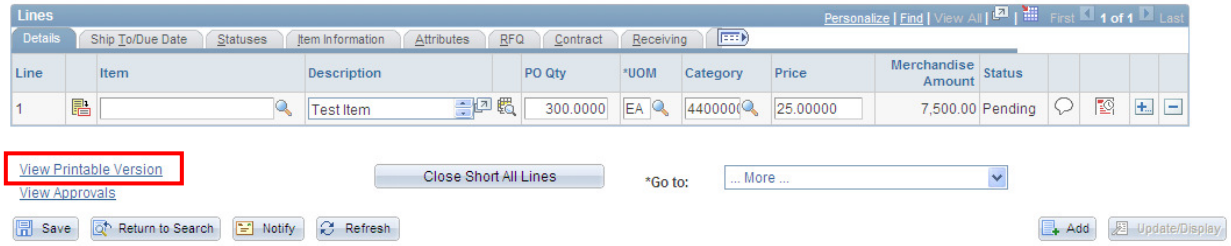
To send the PO into the workflow process for approval, click on the Green Check Mark in the upper right hand corner of the PO.



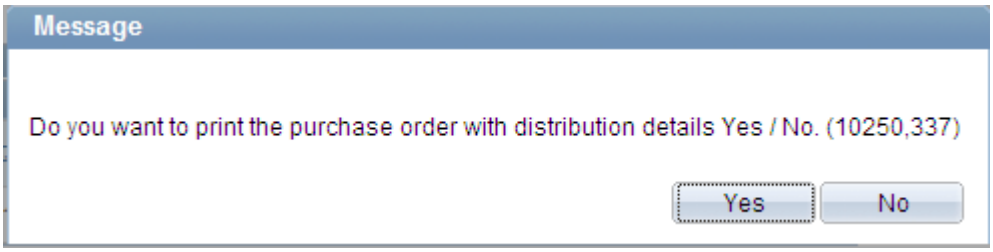
The **PO ID** has been assigned and the **PO Status** now shows as Pend Appr.



If you would like to see the purchase order, click View Printable Version.



Once you click on the link; a pop up window will open asking if you would like to print the distribution details. If you say yes, it will be for this viewing only, it will not send to the vendor.



A new window will open with a PDF version of the Purchase Order.

Purchase Order **Page:** 1 of 1

Dept. of Transportation
Accounts Payable
PO Box 317546
Newington CT 06131-7546
United States

Pending Approval/Approved		Email Dispatch
Purchase Order DOTM1-0000115461	Date 2013-01-17	Revision
Payment Terms Due Now	Freight Terms FOB Destin	Ship Via Common
Buyer DOT-TURBERT Julie	Phone 20349793386	Currency USD

Vendor: 0000010009
SUBURBAN STATIONERS INC
693 HIGH ST
MIDDLETOWN CT 06457
United States

Ship To: Union Ave Rail Operations-New Haven (Train Station)
New Haven CT 06525
United States

Attention: Not Specified

Bill To: Accounts Payable
PO Box 317546
Newington CT 06131-7546
United States

Tax Exempt? Y **Tax Exempt ID:** 066000798DOT **Replenishment Option:** Standard

Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1 - 1	Blue Paper		10.00	CT	40.00	400.00	01/17/2013

DIST: 1

Chartfields

Status	Percentage	PO Qty	Amount
Open	100.0000	10.0000	400.000

GLUnit	Account	Fund	Dept	Programe	Class	BudRef
STATE	54060	1200 1	DOT5778 1	00000	10020	2013

Details/Tax

BaseAmt	BaseCurrency	Currency	Location	Consigned
400.000	USD	USD	ACORE	N

Schedule Total 400.00

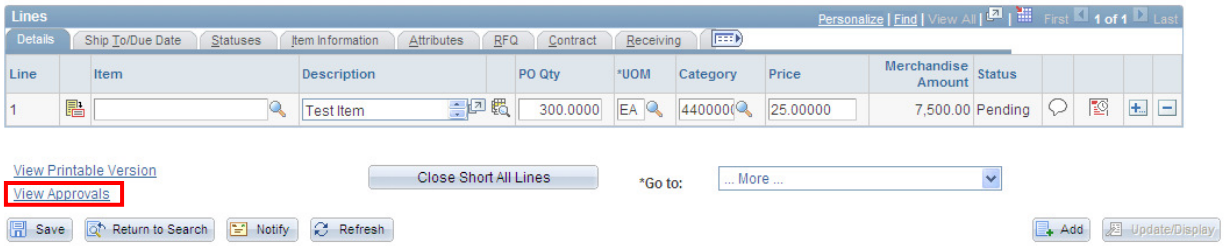
Contract ID: 14DOT0001AA Contract Line: 0 Release: 7 Category Line: 0

5 cartons for first floor - 5 cartons for second floor

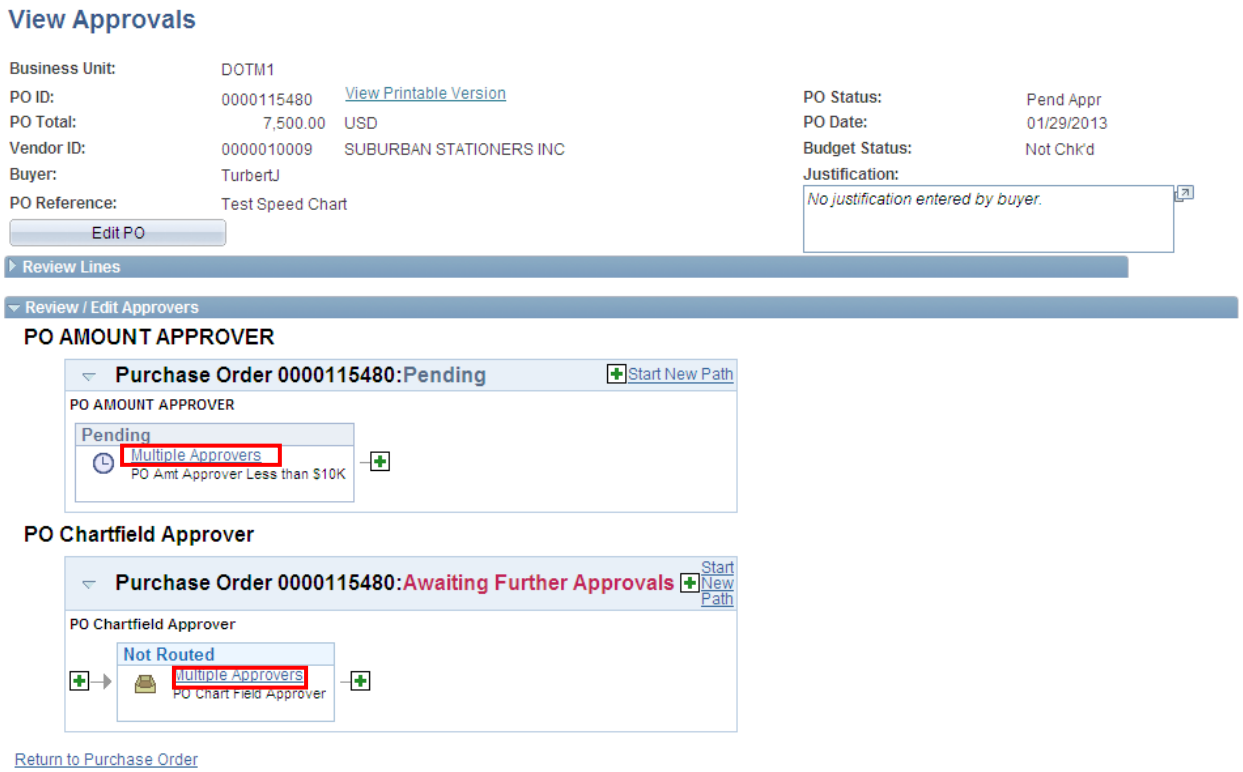
Item Total 400.00

Total PO Amount 400.00

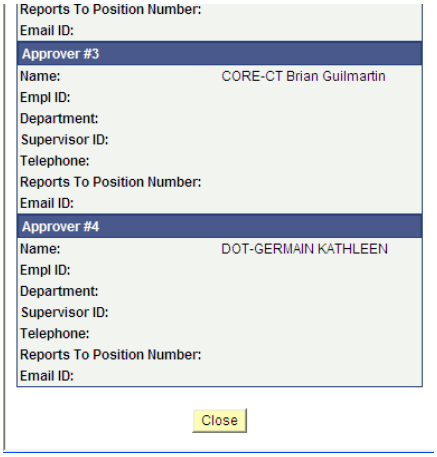
NOTE: In this sample, the distribution details were included.



You also have the options to view the approval chain for this order. Click View Approvals .



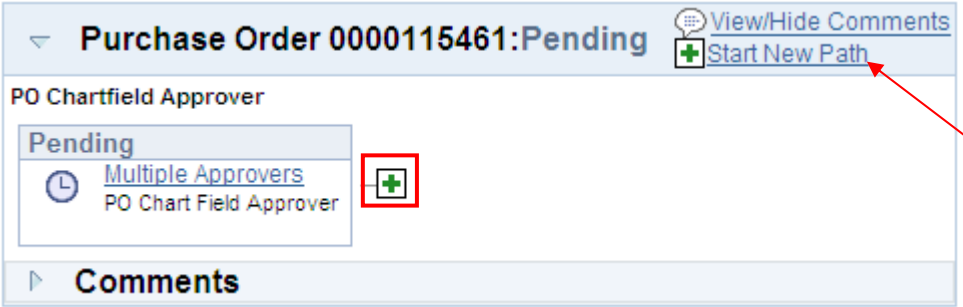
To view the approval group for a buyer, click on Multiple Approvers. This will open a window with all of the approvers allowed for this type of approval.



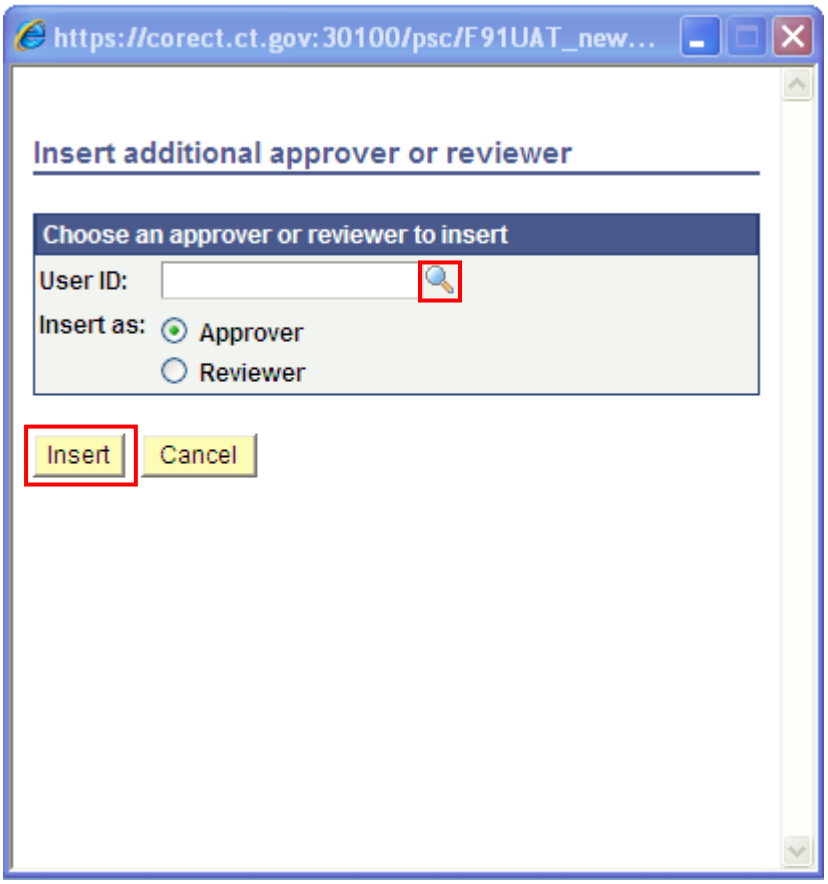
At any time during the order process, a buyer or an approver can view the approval list to see who can approve, or who has approved an order.

Click Close to close the window.

If you need someone else to review an order for any reason, you can insert an additional approver, by clicking the Insert Approver link to the right of the Approver box.



NOTE: Do **NOT** use the Start New Path option.



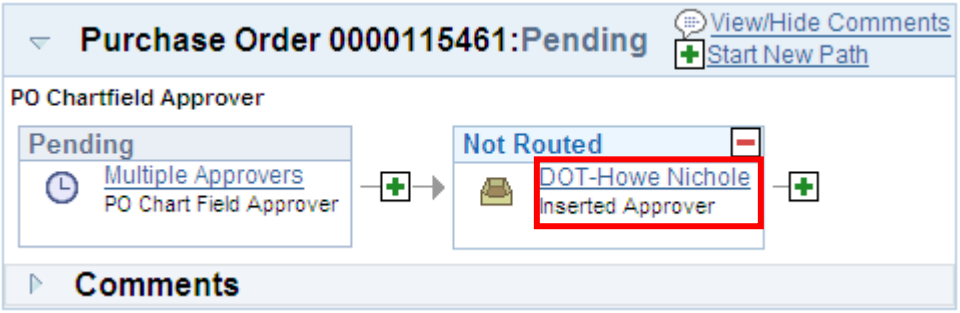
Use the search icon to look for authorized users to add.

If you add the user as an Approver, they will have to approve the order before it can move on.

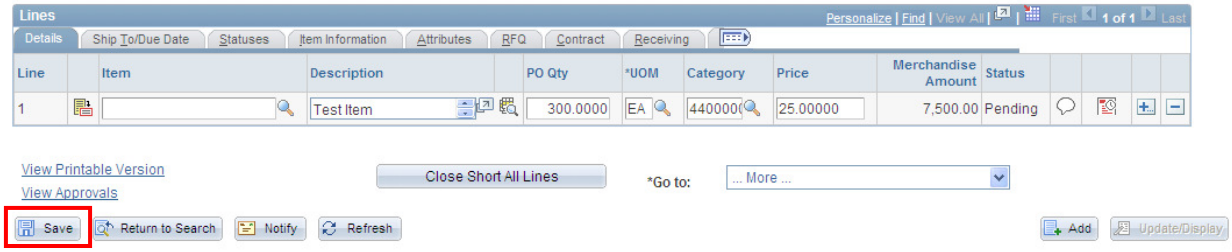
If you add the user as Reviewer, they do not have to approve the order before it can move on. (If the original Approver approves the order, it will bypass the Reviewer if they have not approved it.)

After you have made your selections, click Insert

Repeat the process if you wish to add more users.



The new user is added as an Inserted Approver



Click the Save button on the lower left of the Main Page.

You have successfully created an Online PO!

Purchase Order Approvals

Once a Purchase Order has been placed in the workflow process for approval (Green Check Mark ✓ checked on PO Form), it will appear on the Worklist of the designated Amount and Chartfield Approvers. Chartfield Approvers will not see an order until it has been Amount approved (Unless the Approver has both roles.) Once all approvers have completed approving the order (see separate job aid for details on the approval process), the order will proceed to budget check.

Budget Checking

Once a Purchase Order has attained the PO Status of Approved, it will be available for inclusion in the next scheduled batch Budget Check. Budget checking is scheduled to run at approximately 10am, 12pm, 2pm and overnight.

Upon successful completion of the Budget Checking process, the Budget Status field on the PO header page will indicate Valid. The PO will now be available for inclusion in the next scheduled batch Dispatch run (unless the "Hold From Further Processing" checkbox has been checked). POs are dispatched via batch several times during the day and overnight.

If after running through the Budget Check process the Budget Status field indicates Error, it is the responsibility of the **buyer** to make the necessary changes to correct the error as soon as possible. A PO with a status of Error is not available for dispatch. Multiple errors within a Business Unit have, on occasion, caused that Business Unit's Purchase Orders to be bypassed in the budget check process.

Once a Purchase Order has been successfully Budget Checked and Dispatched, the encumbrance amount will be available and it will be ready for Receipt and Vouchering.

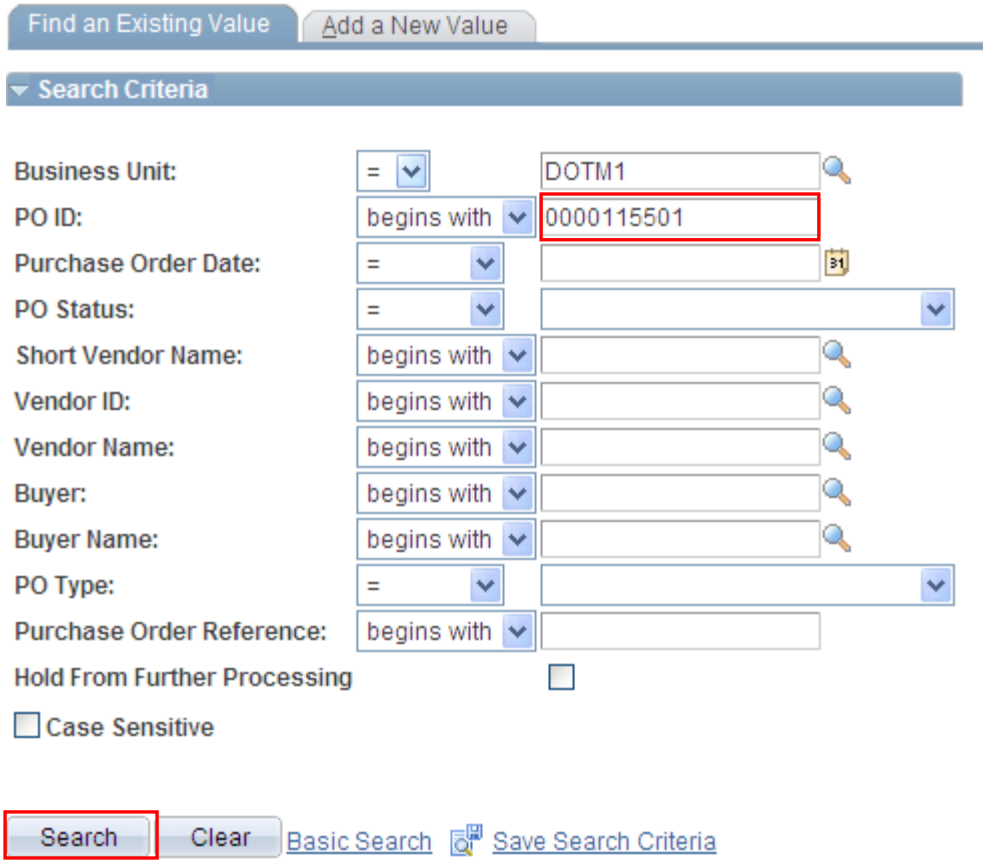
Encumbrance

Once a purchase order has been approve and budget checked, the encumbrance amount will be available to view on the purchase order.

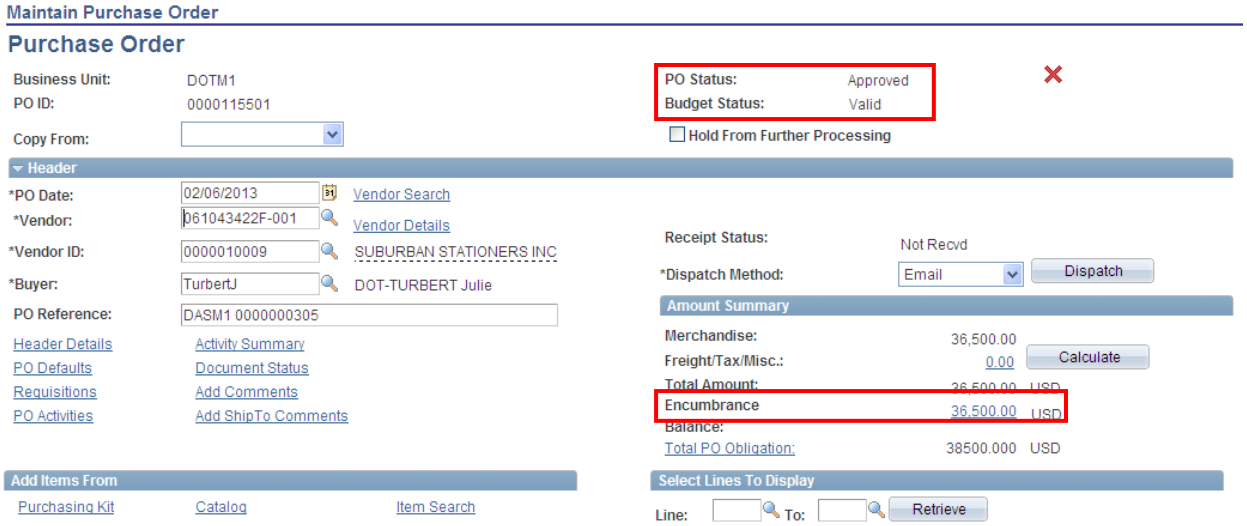
Navigate: Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs

Click on Find an Existing Value .

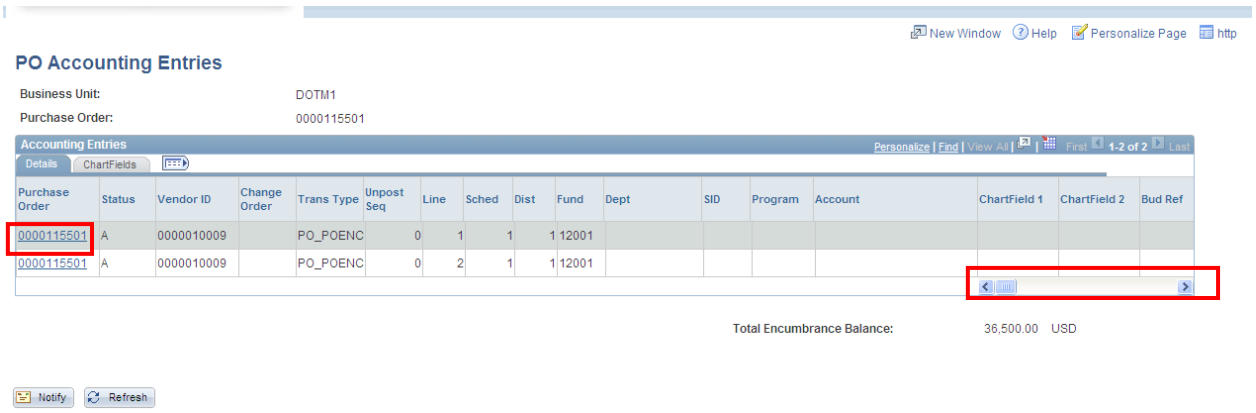
Enter in the purchase order number and click Search .



The purchase order will open up. Under the Account Summary, there will be an Encumbrance line. Click on the value to see the PO Accounting Entries Page.



Scroll through and click on the various links to view detailed accounting information.



Close the window when you are done to return to the purchase order.

Updated 01/03/13