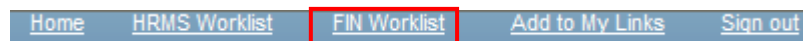


Purchase Order Approvals

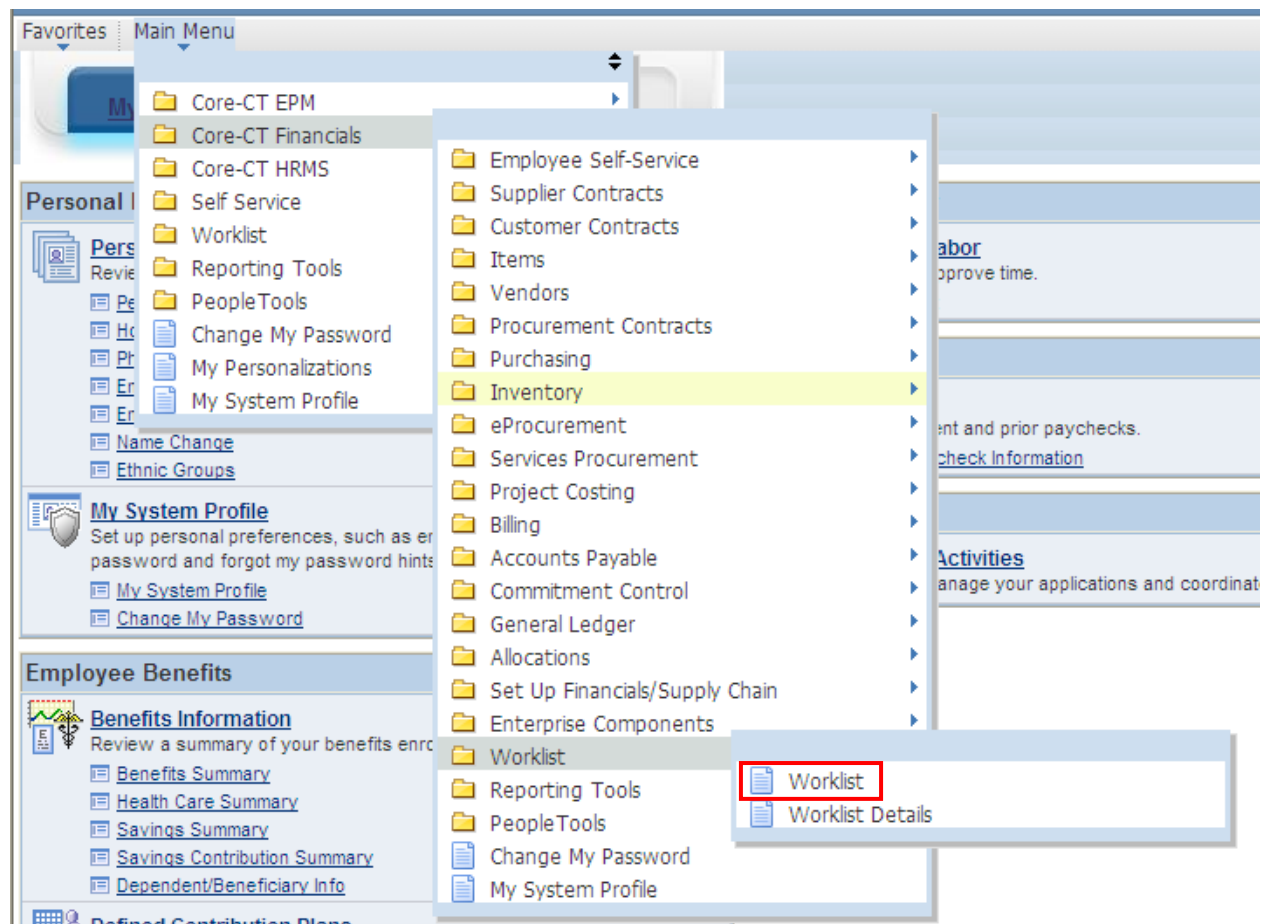
Once a Purchase Order has been placed in the workflow process for approval (Green Check Mark checked on PO Form), it will appear on the Worklist of the designated Amount and Chartfield Approvers. Chartfield Approvers will not see an order until it has been Amount approved (Unless the Approver has both roles.)

If the Approver is designated to approve both the Amount and Chartfield, they will only have to approve once! The first approval will show as **Approved**, while the following approvals will show as **Auto Approved**.

Navigation: FIN Worklist



Alternate Navigation: Main Menu > Core-CT Financials > Worklist > Worklist



Within Core-CT, managing your worklist is a critical activity. You can use the Work List Filters to reorder your Worklist or sort the list by any of the underlined headers.

Worklist for GermainK: DOT-GERMAIN KATHLEEN

[Detail View](#) Work List Filters: Feed ▾

<u>From</u>	<u>Date From</u>	<u>Work Item</u>	<u>Worked By Activity</u>	<u>Priority</u>	Link	
DOT-TURBERT Julie	01/15/2013	Approval Routing	Approval Workflow	2-Medium ▾	PurchaseOrder.751.STATE.1901-01-01.N.0.BUSINESS_UNIT:DOTM1 PO ID:0000115459	Reassign
DOT-TURBERT Julie	01/17/2013	Approval Routing	Approval Workflow	2-Medium ▾	PurchaseOrder.791.STATE.1901-01-01.N.0.BUSINESS_UNIT:DOTM1 PO ID:0000115461	Reassign

Note: Clicking “Ctrl + F” opens up a search field where a PO number can be entered.

✕ Find: Previous Next Options ▾

Locate the Worklist item that you need to take action on. Clicking on the blue hyperlink will display the Purchase Order Approval screen.

Worklist for GermainK: DOT-GERMAIN KATHLEEN

[Detail View](#) Work List Filters: Feed ▾

<u>From</u>	<u>Date From</u>	<u>Work Item</u>	<u>Worked By Activity</u>	<u>Priority</u>	Link	
DOT-TURBERT Julie	01/15/2013	Approval Routing	Approval Workflow	2-Medium ▾	PurchaseOrder.751.STATE.1901-01-01.N.0.BUSINESS_UNIT:DOTM1 PO ID:0000115459	Reassign
DOT-TURBERT Julie	01/17/2013	Approval Routing	Approval Workflow	2-Medium ▾	PurchaseOrder.791.STATE.1901-01-01.N.0.BUSINESS_UNIT:DOTM1 PO ID:0000115461	Reassign

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.

Purchase Order Approval

Business Unit: DOTM1
 PO ID: 0000115461 [View Printable Version](#)
 PO Total: 400.00 USD
 Vendor ID: 0000010009 SUBURBAN STATIONERS INC
 Buyer: TurberJ
 PO Reference: Test PO

PO Status: Pend Appr
 PO Date: 01/17/2013
 Budget Status: Not Chk'd
 Justification:

Review Lines

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency
<input type="checkbox"/>	1	Blue Paper	10.0000	CT	40.00000	400.00	USD

[Select All / De-select All](#)

Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000115461: Pending

PO AMOUNT APPROVER

Pending

PO Chartfield Approver

Purchase Order 0000115461: Awaiting Further Approvals

PO Chartfield Approver

Not Routed

Approval Comments:

[Return to Worklist](#)

Reports To Position Number:

Email ID:

Approver #3


Name: CORE-CT Brian Guilmartin
 Empl ID:
 Department:
 Supervisor ID:
 Telephone:
 Reports To Position Number:
 Email ID:

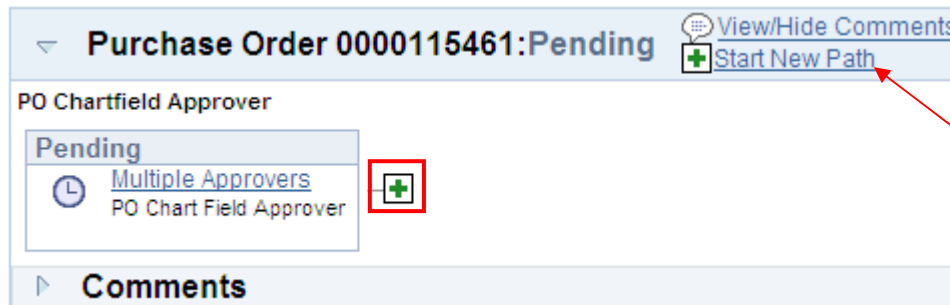
Approver #4

Name: DOT-GERMAIN KATHLEEN
 Empl ID:
 Department:
 Supervisor ID:
 Telephone:
 Reports To Position Number:
 Email ID:

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 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.



Purchase Order 0000115461: Pending

PO Chartfield Approver

Pending


Multiple Approvers 

PO Chart Field Approver

View/Hide Comments

Start New Path

Comments

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



https://corect.ct.gov:30100/psc/F91UAT_new...


Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID: 

Insert as: Approver Reviewer


Insert Cancel

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 .

Repeat the process if you wish to add more users.

If you decide to delete the approver – click  to remove them.

The new user is added as an Inserted Approver

To view the purchase order, click the [View Printable Version](#) link

Purchase Order Approval

Business Unit:	DOTM1	View Printable Version	PO Status:	Pend Appr
PO ID:	0000115461		PO Date:	01/17/2013
PO Total:	400.00	USD	Budget Status:	Not Chk'd
Vendor ID:	0000010009	SUBURBAN STATIONERS INC	Justification:	<input type="text" value="No justification entered by buyer."/>
Buyer:	TurbertJ			
PO Reference:	Test PO			

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.

Message

Do you want to print the purchase order with distribution details Yes / No. (10250,337)

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	Date	Revision
DOTM1-0000115461	2013-01-17	
Payment Terms	Freight Terms	Ship Via
Due Now	FOB Destin	Common
Buyer	Phone	Currency
DOT-TURBERT Julie	20349793386	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

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

Chart fields

Status	Percentage	PO Qty	Amount
Open	100.0000	10.0000	400.000

GLUnit	Account	Fund	Dept	Program	Class	BudRef
STATE	54060	1200	DOTS778	00000	10020	2013
		1	1			

Details/Tax

BaseAmt	BaseCurrency	Currency	Location	Consigned
400.000	USD	USD	ACORE	N

Contract ID: 14DOT0001AA

Contract Line: 0

Schedule Total: 400.00
Release: 7

Category Line: 0

5 cartons for first floor - 5 cartons for second floor

Item Total: 400.00

Total PO Amount: 400.00

In this sample, the distribution details were included.

This same procedure can be accomplished by selecting any or all lines on the purchase order and clicking View Lines Details. However, you will not be given the option to print the distribution details, they will print automatically.

Purchase Order Approval

Business Unit: DOTM1

PO ID: 0000115461 [View Printable Version](#)

PO Total: 400.00 USD

Vendor ID: 0000010009 SUBURBAN STATIONERS INC

Buyer: TurbertJ

PO Reference: Test PO

Edit PO

PO Status: Pend Appr

PO Date: 01/17/2013

Budget Status: Not Chk'd

Justification:

No justification entered by buyer.

Review Lines

Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency
<input checked="" type="checkbox"/>	1	Blue Paper	10.0000	CT	40.00000	400.00	USD

Select All / De-select All

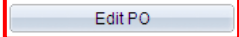
View Lines Details

If you need to make a change to the purchase order, click

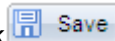


Purchase Order Approval

Business Unit:	DOTM1		PO Status:	Pend Appr
PO ID:	0000115461	View Printable Version	PO Date:	01/17/2013
PO Total:	400.00	USD	Budget Status:	Not Chk'd
Vendor ID:	0000010009	SUBURBAN STATIONERS INC	Justification:	<input type="text" value="No justification entered by buyer."/>
Buyer:	TurbertJ			
PO Reference:	Test PO			



This will open up the purchase order. Make any changes necessary then click



You will not return to the Worklist automatically. Click [FIN Worklist](#) to go back your worklist and select the purchase order again.

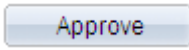
Completely review the relevant details of the purchase order and then choose the appropriate Approval button.

There are three Approval Options: Approve, Hold, and Deny.

Approval Comments

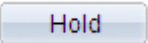



[Return to Worklist](#)

Approve: When you choose to approve a purchase order, click  and Core-CT routes the PO to the next approver in the workflow or sets the status to “Approved”, if it has completed all approvals.

You can enter a comment for the approval if necessary.

NOTE: If you have both Amount and Chartfield approval rights, make sure you have checked both sections. Clicking approve will do both at once!


Hold: This action should be chosen if you are temporarily holding the order (i.e. additional funding, documentation). If something needs to be changed on the PO, please use Deny to insure that the order is processed correctly. First, type your reason for holding the order in the Approval Comments box, then click .

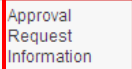
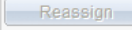
The approver will have an Information Request box with whom the order is being sent back to. Click  to see the reason.

PO AMOUNT APPROVER

The PO will be routed back to the associated buyer's Worklist and an email will be sent to the buyer.

Worklist for TurbertJ: DOT-TURBERT Julie

Detail View Work List Filters:  Feed

From	Date From	Work Item	Worked By Activity	Priority	Link	
DOT-GERMAIN KATHLEEN	01/17/2013		Approval Workflow	2-Medium	PurchaseOrder.791.STATE.1901-01-01.N.0.BUSINESS_UNIT:DOTM1 PO_ID:0000115461	

Note: The Work List Filters is set to Approval Request Information to limit the number of lines displayed.

Sample Email:

Information has been requested for the following purchase order.

Business Unit: Dept. of Transportation
 PO ID: 0000115461
 PO Reference: Test PO
 PO Date: 2013-01-17
 Buyer: TurbertJ

You can navigate directly to the approval page by clicking the link below.

https://corect.ct.gov:30100/psp/F91UAT/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.PO_APPROVAL.GBL?Page=PO_APPROVAL&Action=U&BUSINESS_UNIT=DOTM1&PO_ID=0000115461

The buyer will see the same information as the Approver and can add a comment if necessary.

PO AMOUNT APPROVER

▼ Purchase Order 0000115461: **Awaiting Further Approvals**
View/Hide Comments
+ Start New Path

PO AMOUNT APPROVER

On Hold

[Multiple Approvers](#)
 PO Amt Approver Less than \$10K
 02/26/13 - 1:51 PM

Information Request

[DOT-TURBERT Julie](#)
 Information Request

▼ **Comments**

DOT-GERMAIN KATHLEEN at 02/26/13 - 1:51 PM
Waiting for Funding

▶ **Comment History**

PO Chartfield approver

▼ Purchase Order 0000115461: **Awaiting Further Approvals**
View/Hide Comments
+ Start New Path

PO Chartfield approver

Not Routed

[Multiple Approvers](#)
 PO Chart Field Approver

▶ **Comments**

▶ **Comment History**

Approval Comments

Once the order is ready to approve, the approver who place the order on hold, can submit it.

PO AMOUNT APPROVER

View/Hide Comments
Start New Path

PO Chartfield Approver

View/Hide Comments
Start New Path

PO Chartfield Approver

Multiple Approvers +
 PO Chart Field Approver

[Return to Purchase Order](#)

Note: If a chartfield approver places an order on hold, the order will go back to the buyer. However, since it has been amount approved, once it has been corrected, the purchase order will stay in the chartfield approver's Worklist. It will not need to be amount approved again.

After an order has been completely approved, a buyer or an approver can go back in and view who approved the order and when.

PO AMOUNT APPROVER

PO AMOUNT APPROVER

DOT-GERMAIN KATHLEEN
 PO Amt Approver Less than \$10K
 01/14/13 - 1:18 PM

PO Chartfield Approver

PO Chartfield Approver

DOT-Torcia Mario
 PO Chart Field Approver
 01/14/13 - 1:20 PM

[Return to Purchase Order](#)

Deny: This action should be chosen if you determine that a PO should be changed or canceled. The PO will be routed back to the associated buyer's Worklist and the buyer will receive an email. The Approval Status will change from Pend Appr to Denied. You must specify your denial reason in the Approval Comments box then click .

Click [View/Hide Comments](#) to see the reason.

PO Chartfield Approver

Purchase Order 0000115446: Denied [View/Hide Comments](#)

PO Chartfield Approver

Denied

DOT-Torcia Mario
PO Chart Field Approver
01/17/13 - 2:26 PM

Comments

DOT-Torcia Mario at 01/17/13 - 2:26 PM
Not enough money in budget

Comment History

DOT-GERMAIN KATHLEEN at 01/15/13 - 1:17 PM
[View History](#)

[Return to Worklist](#)

[Approval History](#)

Note: The Work List Filters: is set to Transactions Denied to limit the number of lines displayed.

Worklist for TurbertJ: DOT-TURBERT Julie

[Detail View](#) Work List Filters: [Feed](#)

From	Date From	Work Item	Worked By Activity	Priority	Link	
DOT-GERMAIN KATHLEEN	12/20/2012	Transaction Denied	Approval Workflow	2-Medium	PurchaseOrder. 221. STATE. 1901-01-01. N. 0. BUSINESS. UNIT-DOTM1 PO ID:0000115399	<input type="button" value="Reassign"/>
DOT-GERMAIN KATHLEEN	12/20/2012	Transaction Denied	Approval Workflow	2-Medium	PurchaseOrder. 241. STATE. 1901-01-01. N. 0. BUSINESS. UNIT-DOTM1 PO ID:0000115401	<input type="button" value="Reassign"/>

When you view the purchase order PO status has been changed to Denied.

Maintain Purchase Order

Purchase Order

Business Unit: DOTM1
PO ID: 0000115446
Copy From:

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

Sample Email

The following purchase order has been "Denied".

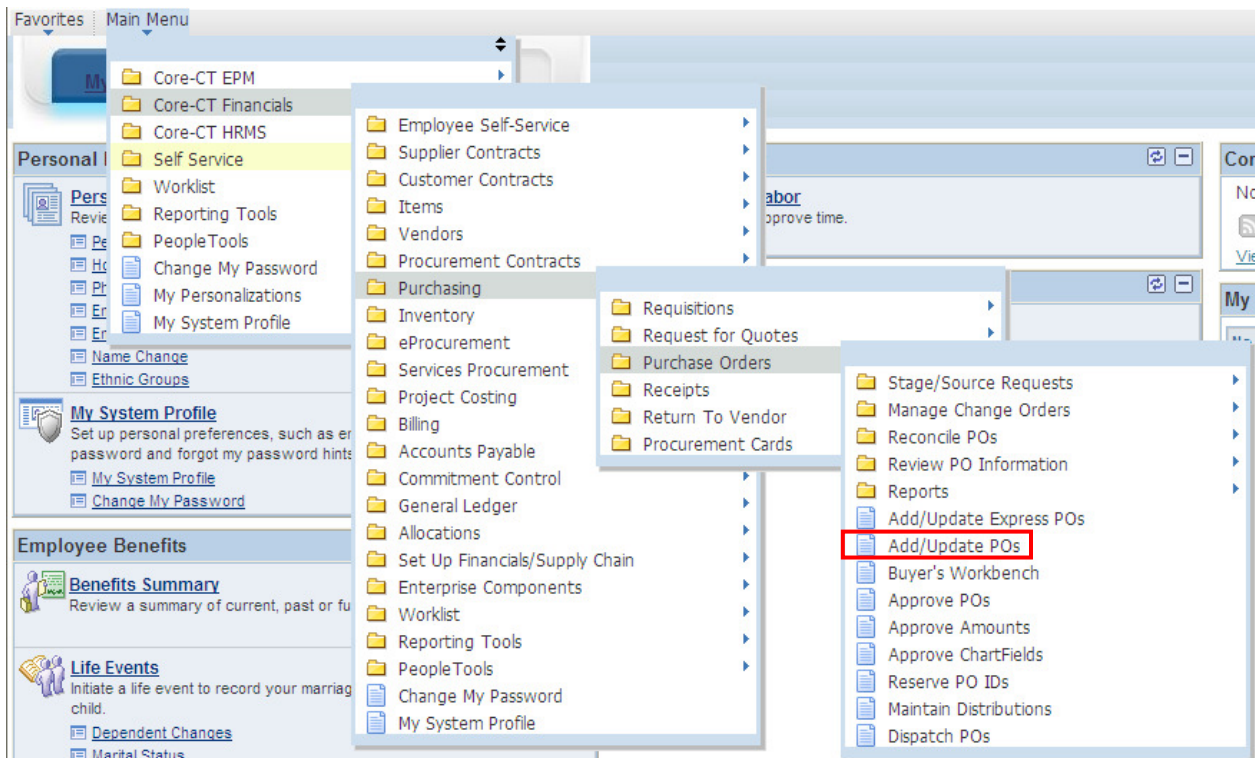
Business Unit: Dept. of Transportation
 PO ID: 0000115446
 PO Reference: Test PO Obligation Zero
 PO Date: 2013-01-10
 Buyer: TurbertJ

You can navigate directly to the approval page by clicking the link below.

https://corect.ct.gov:30100/psp/F91UAT/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.PO_APPROVAL.GBL?Page=PO_APPROVAL&Action=U&BUSINESS_UNIT=DOTM1&PO_ID=0000115446

Once the order has been denied, the buyer has the option to close the purchase order, or to reopen it, make the necessary adjustments, and resubmit it for approval

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



Click on [Find an Existing Value](#).

Purchase Order

[Find an Existing Value](#) [Add a New Value](#)

Business Unit:

PO ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Enter then the PO ID and click [Search](#).

[Find an Existing Value](#) [Add a New Value](#)


▼ Search Criteria

Business Unit:	=	<input type="text" value="DOTM1"/>
PO ID:	begins with	<input type="text" value="0000115446"/>
Purchase Order Date:	=	<input type="text"/>
PO Status:	=	<input type="text"/>
Short Vendor Name:	begins with	<input type="text"/>
Vendor ID:	begins with	<input type="text"/>
Vendor Name:	begins with	<input type="text"/>
Buyer:	begins with	<input type="text"/>
Buyer Name:	begins with	<input type="text"/>
PO Type:	=	<input type="text"/>
Purchase Order Reference:	begins with	<input type="text"/>

Hold From Further Processing

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Either click on the  to cancel the purchase order, or modify the purchase order and click save to resubmit.


My HR
Finance
Core-CT Help

Purchase Order

Business Unit: DOTM1

PO ID: 0000115446

Copy From:

PO Status: Denied 

Budget Status: Not Chkd

Hold From Further Processing

Header

*PO Date: 01/10/2013 [Vendor Search](#)

*Vendor: 061043422F-001 [Vendor Details](#)

*Vendor ID: 0000010009 [SUBURBAN STATIONERS INC](#)

*Buyer: TurbertJ [DOT-TURBERT Julie](#)

PO Reference: Test PO Obligation Zero

[Header Details](#) [Activity Summary](#)

[PO Defaults](#) [Document Status](#)

[Requisitions](#) [Add Comments](#)

[PO Activities](#) [Add ShipTo Comments](#)

Receipt Status: Not Recvd

*Dispatch Method: Email

Amount Summary

Merchandise: 1,000.00

Freight/Tax/Misc.: 0.00

Total Amount: 1,000.00 USD

Encumbrance Balance:






Total PO Obligation: 1000.0000 USD

Add Items From

[Catalog](#) [Item Search](#)

Select Lines To Display

Line: To:

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		Paper Folder	1.0000	EA	4400000	1,000.00000	1,000.00	Denied			 

[View Printable Version](#) *Go to:

Updated 01/01/13