There have been several changes in the **Purchasing** module with the upgrade from Core-CT 8.9 to Core-CT 9.1. The navigation and components remain the same for creating POs, but PO Approvals are no longer handled through the menu. Approvers and Buyers review and approve from their worklists, email notifications, and links in the PO and approval pages.

Creating Requisitions

All users enter **Requisitions** in **eProcurement** module of Core-CT. Core-CT users can still view their ePro requisitions in **Base Requisitions**.

Purchase Orders

There are a few changes in fields that display and are updated in the PO header.

Encumbrance Lookup

A link has been added to the header to allow users to review encumbrance data on a PO.

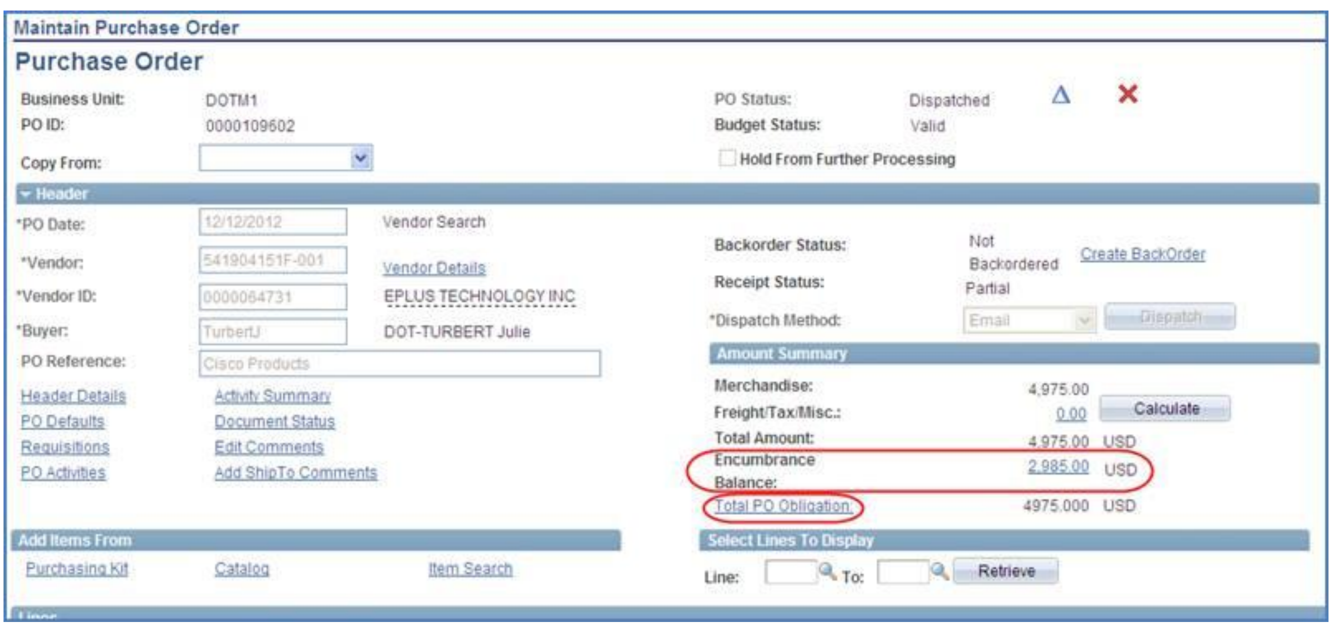
PO Obligation

There are two changes with how PO Obligation is recorded on a Purchase Order:

- **PO Obligation** on manually entered Purchase Orders defaults as:

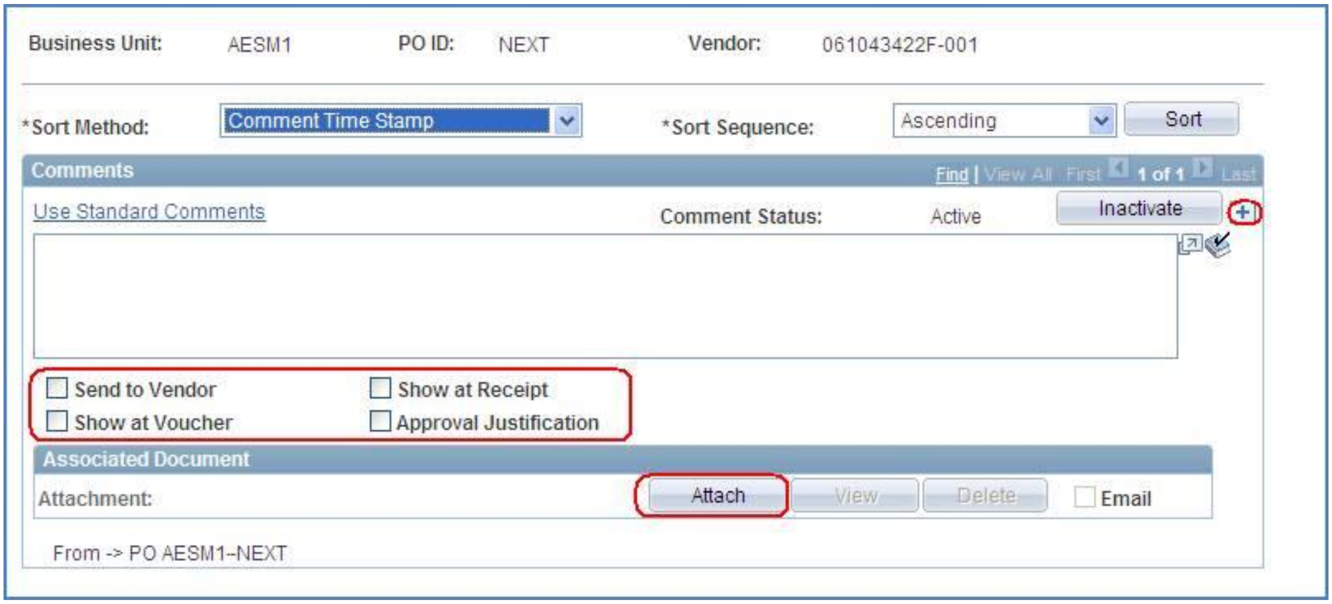
  Start Date = PO Entered Date
  End Date = Fiscal Year End Date
  Total Obligation Amount = PO Total Amount

- **PO Obligation** automatically populates on POs originating from an ePro requisition. The values default from the **Req Obligation** captured on the originating requisition.



Expanded Functionality for Adding Comments and Attachments to a PO

Buyers have the option to add multiple comments and attachments to the PO Header and each line of the PO. Each comment can be routed separately using a set of optional checkboxes. There is a new option for designating comments for **Approval Justification**. These comments display in the header on the **Purchase Order Approval** page.



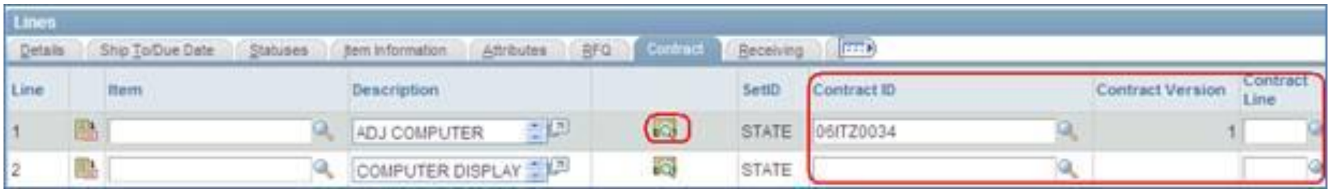
The **View** and **Delete** buttons become active once an attachment is added to a comment. It remains associated with the PO and visible to anyone who has the authority to review it.

The **Email** checkbox also becomes active allowing the buyer to send the attachment to a vendor along with the PO as long as:

1. The **Send to Vendor** option is checked for the comment.
2. The **PO Dispatch** method is **Email**. The attachment has to be sent manually when **Fax**, **Print** and **EDX** methods are used.

Associating Contracts to a PO Line

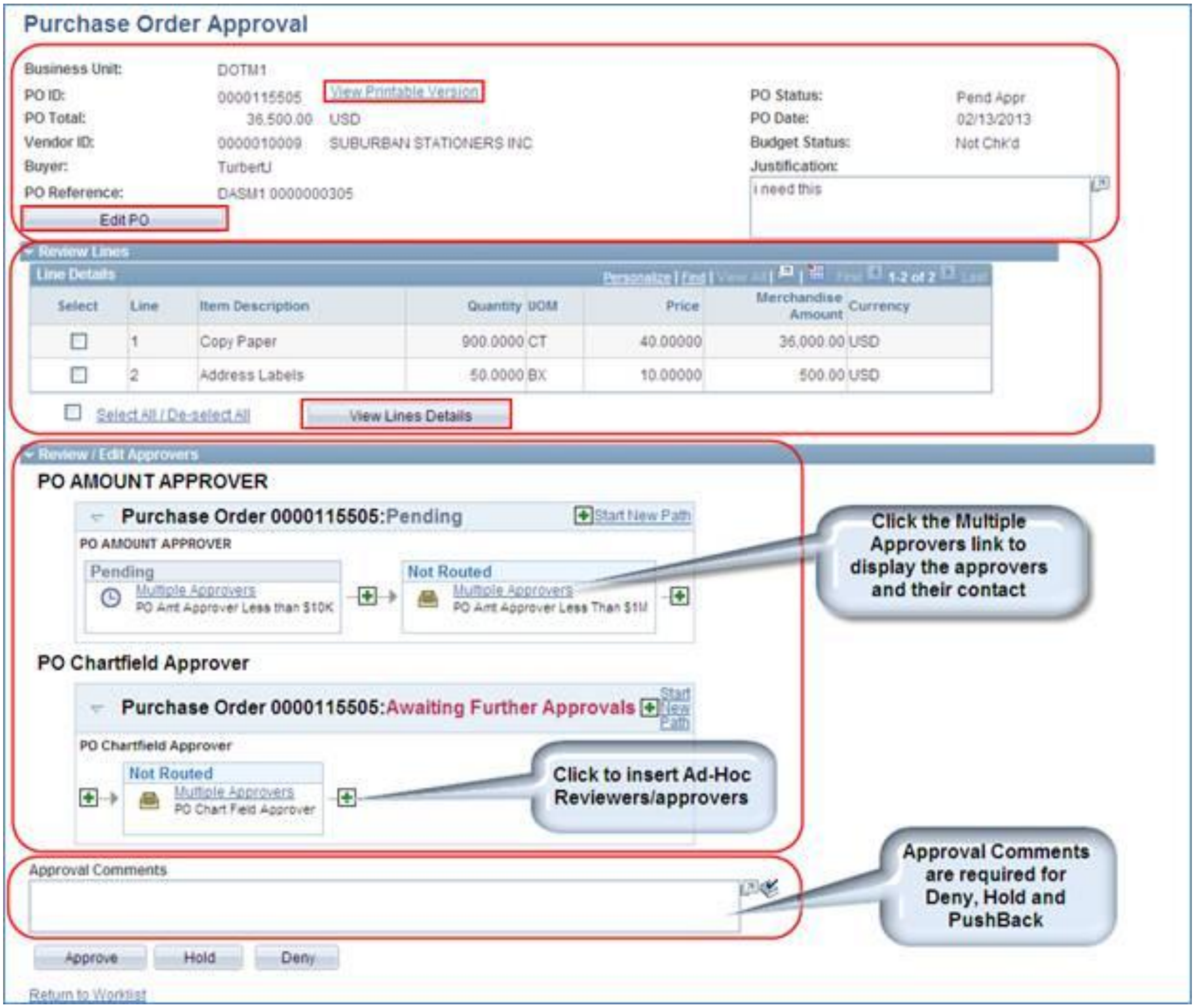
There are new options within the **Contract** tab for associating a contract to the lines of a PO.



- **Contract Search**
  The search button has been added to find and review the details of the active contracts with the vendor on the PO. This is the same search found in **Procurement Contracts** module. The buyer can select the contract from the results to associate it to the line item.
- **Contract ID LookUp**
  If the buyer knows the Contract ID they enter or use the lookup to add it to the line item. This is was previously available in Core-CT.
- **Line Details**
  Users can still search and select contracts from the line details page.

Purchase Order Approvals

The look and functionality of PO Approval has been changed to the **Approval Workflow Engine** with the upgrade to Core-CT 9.1. Approvers navigate to their worklist to review and approve POs. The menu links previously used have been removed as all approval functionality is accessed from approval pages.



Approver actions include:

- **Approve** Core-CT routes the purchase order to the next approver and updates the approval status for the current approval step.
- **Deny** Denying a purchase order stops workflow. A notification email is sent to the Buyer and the PO is routed to their worklist. The approver is required to include comments which should include instructions to cancel or to edit and resubmit the PO for approval.

- **Hold**
  Hold can be used if more time is needed to research an issue. The hold action prevents the approval process from going to the next approval step until the approver takes action on the purchase order when the purchase order is updated in such a way that the approval process is restarted.
- **Pushback**
  Once a purchase order has been approved by at least one person, the next approver can push back the purchase order to have the previous approver reconsider the approval.
- **Insert Ad-Hoc Approvers** buttons for adding other Reviewers and Approvers to the current or a later stage of the approval process
- **Editing a PO** from the **Approvals Page**
- **Review Approval History**
  Approval history is tracked and accessible for review from the Purchase Order Approval page**.**

Using the Approve Purchase Orders Search

Navigation: Purchasing > Purchase Orders > Approve POs

The **Approve Purchase Orders** page allows buyers and approvers to use a powerful search tool to find approvals. Change the **Approval Status** to review POs currently **Pending** and **On Hold**. View the **Approved**, **Denied,** and **Pushed Back** POs that may no longer be in the worklist. The mass approval functions are not available, as this is not the Business Process. Users must click the **PO ID** link to perform approvals on each PO.