



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.

**Maintain Purchase Order**

**Purchase Order**

Business Unit: DOTM1  
PO ID: 0000109602  
Copy From: [Dropdown]

PO Status: Dispatched  
Budget Status: Valid  
 Hold From Further Processing

**Header**

\*PO Date: 12/12/2012 Vendor Search  
\*Vendor: 541904151F-001 Vendor Details  
\*Vendor ID: 0000084731 EPLUS TECHNOLOGY INC  
\*Buyer: TurberTJ DOT-TURBERT Julie  
PO Reference: Cisco Products

Backorder Status: Not Backordered Create BackOrder  
Receipt Status: Partial  
\*Dispatch Method: Email Dispatch

**Amount Summary**

Merchandise:	4,975.00	
Freight/Tax/Misc.:	0.00	Calculate
Total Amount:	4,975.00	USD
Encumbrance:	2,985.00	USD
Balance:	2,985.00	USD
Total PO Obligation:	4,975.00	USD

**Add Items From**

Purchasing Kit Catalog Item Search

Select Lines To Display

Line: [Input] To: [Input] Retrieve

## 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 screenshot shows the 'Comments' section of a PO interface. At the top, it displays 'Business Unit: AESM1', 'PO ID: NEXT', and 'Vendor: 061043422F-001'. Below this, there are sorting options: '\*Sort Method: Comment Time Stamp' and '\*Sort Sequence: Ascending'. The 'Comments' section has a 'Comment Status: Active' and an 'Inactivate' button. A text area for the comment is empty. Below the text area, there are four checkboxes: 'Send to Vendor', 'Show at Receipt', 'Show at Voucher', and 'Approval Justification'. The 'Associated Document' section shows an 'Attachment:' field with 'Attach', 'View', and 'Delete' buttons, and an 'Email' checkbox. The bottom of the interface shows 'From -> PO AESM1-NEXT'.

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.

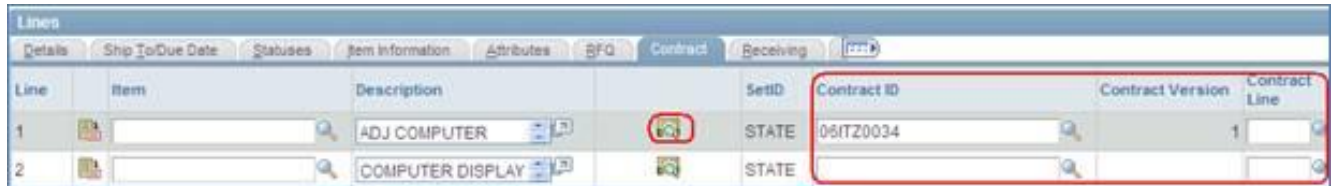
The screenshot shows the 'Comments' section of a PO interface with an active comment. The 'Comment Status' is 'Active' and the 'Inactivate' button is active. The comment text area contains 'Please supply per the attached Quotation'. Below the text area, the 'Send to Vendor' checkbox is checked, and the 'Email' checkbox is also checked. The 'Associated Document' section shows an 'Attachment: QUOTE\_1234.pdf' with 'Attach', 'View', 'Delete', and 'Email' buttons. The bottom of the interface shows 'From -> PO AESM1-NEXT'.

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.



Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line
1		ADJ COMPUTER	STATE	05ITZ0034	1	
2		COMPUTER DISPLAY	STATE			

- **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.

The screenshot displays the 'Purchase Order Approval' interface. At the top, it shows PO details: Business Unit (DOTM1), PO ID (0000115505), PO Total (36,500.00 USD), Vendor ID (0000010009 - SUBURBAN STATIONERS INC), Buyer (TurbertJ), and PO Reference (DASM1 0000000305). The PO Status is 'Pend Appr' and the PO Date is '02/13/2013'. A justification box contains the text 'i need this'. Below this is a table of 'Review Lines' with two items: 'Copy Paper' (900.0000 CT, Price 40.00000, Merchandise Amount 36,000.00 USD) and 'Address Labels' (50.0000 BX, Price 10.00000, Merchandise Amount 500.00 USD). The 'Review / Edit Approvers' section shows a workflow for 'PO AMOUNT APPROVER' with a 'Pending' step and a 'Not Routed' step. A callout points to the 'Multiple Approvers' link in the 'Not Routed' step, stating: 'Click the Multiple Approvers link to display the approvers and their contact'. Below this is a 'PO Chartfield Approver' section with a 'Not Routed' step and a 'Multiple Approvers' link. A callout points to this link, stating: 'Click to insert Ad-Hoc Reviewers/approvers'. At the bottom, there is an 'Approval Comments' text area with a callout stating: 'Approval Comments are required for Deny, Hold and PushBack'. At the very bottom are buttons for 'Approve', 'Hold', and 'Deny', and a 'Return to Worklist' link.

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.

**Approve Purchase Orders**

Search

Enter search criteria and hit the Search button.

\*Business Unit:

From PO ID:

PO Date From:

Vendor ID:

Buyer:

\*Approval Status:

To PO ID:

PO Date To:

Vendor Name:

PO Reference:

Search Clear

**Purchase Orders**

To approve or deny one or more POs, select the appropriate action from the dropdown and click Submit.  
To view the PO details, click the PO ID link.

Expand All Collapse All

Action/Status	PO ID	PO Date	Buyer	PO Reference	PO Total	Vendor ID	Vendor Name
<input type="text" value="Pending"/>	<a href="#">0000115505</a>	02/13/2013	TurberLJ	DASM1 0000000305	36,500.00 USD	0000010009	PIONEER CO-001

Mark All:  Approve  Hold  Deny

Submit