High Level Description

<table>
<thead>
<tr>
<th>Process</th>
<th>Create a New Express PO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module</td>
<td>Purchasing</td>
</tr>
<tr>
<td>Document Type</td>
<td>Business Process Guide</td>
</tr>
</tbody>
</table>

Revision Control

<table>
<thead>
<tr>
<th>Date</th>
<th>By</th>
<th>Action</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-09-2008</td>
<td>M Walker</td>
<td>9.0 Process</td>
<td>26</td>
</tr>
<tr>
<td>12-17-2008</td>
<td>M Walker</td>
<td>Standard Comment change and addition of Short print</td>
<td>24</td>
</tr>
</tbody>
</table>

Table of Contents

Table of Contents ............................................................................................................................................................. 1
Overview ........................................................................................................................................................................... 1
Create a New Express PO ............................................................................................................................................ 2
Add an Express PO ................................................................................................................................................... 2
Print an Express PO ................................................................................................................................................ 19
Print an Express PO Prior to Approving it ............................................................................................................... 23
Whom to Contact for Help? ......................................................................................................................................... 24

Overview

The Express Purchase Order is used by the Purchasing Department to order requested materials or services.
Create a New Express PO

Add an Express PO

Navigate to Purchasing > Purchase Orders > Add/Update POs

The Express Purchase Order page displays.

1. Click the Add a New Value tab

The Purchase Order page displays.

2. Enter Vendor ID (In our example, it is 0000009750)

3. Click Refresh
Note that the **Vendor** name and **Buyer** are populated. Buyer is **BUYERTBA**.

As an end user you may only use **BUYERTBA** and Vendor to Be Assigned.

4. Click the **PO Defaults** link

The **Purchase Order Defaults** page displays.

Due to the large size of this field you should customize **PO Defaults** to hide the elements you will not need.

5. Click the **Customize** link on the far right of the screen
6. Highlight the areas you wish to hide

7. Check the Hidden box

*Note: These will include Oper Unit, Activity.*

8. Click OK

*Note: This will hide the items you have highlighted.*

The Purchase Order Defaults page displays.

The **Ship Via** and **Freight Terms** are default.
9. Enter Ship To (CCC for Concord or CSUH for Hayward Main Campus)

10. Enter Chartfield Information

This must include Account, Fund and Dept. If you have Program, Class and/or Project Codes enter these also. This will allow the information you entered to default to each and every line you will create in the Express PO without having to enter them repeatedly.

11. Click OK

The Purchase Order page displays.

12. Click the Expand All link

Note that the chartfield information you entered in the Default portion now appears in the Distribution area and that the Schedule shows the Ship To location.

13. Click the Customize link for the Distribution Section
14. Select areas that you will not need

15. Check the Hidden box

Note that there is a lot of information in this area and you will need to scroll down to see all of them.

16. Click OK
One of the most important areas of the request is Location as it is where you will need the item delivered or service performed. The default for Location is **Change** which cues you to change it to the actual location. To find this feature easier you will need to **Customize** the Distribution area one more time.

17. Select Location

18. Click the **Up** arrow to move it to the Tab Chartfields

![Tab Chartfields](image)

19. Click OK

The Purchase Order page displays.

Note that the Location Reads Change.

20. Change it by entering the Room Number

Use the Magnifying Glass to...
find locations in the system.

The Look Up Location page displays.

The Look Up Location table can be sorted by **Location Code** as shown here.

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The Look Up Location table can be sorted by **Description** by clicking the Underlined feature you wish.
The Table will only list 300 items at a time and you may need to limit your search.

21. Select **Contains**

22. Enter the first few letters of the Department

23. Click Lookup

24. Select the room you wish

The Purchase Order page displays.

25. Enter the **Description** of the item you wish to order
26. Click the **Line Details** icon

The Details for Line 1 page displays.

27. Enter description in the box entitled **Transaction Item Description**

28. Click the **Spell Check** icon

The Spell Check page displays.

29. Make corrections as necessary
When all errors have been corrected you will receive “The spelling check is complete” message.

30. Click OK

31. Click OK

The Purchase Order page displays.

32. Enter Quantity

33. Enter UOM.

Note: Normally this will be **EA** for commodities and **JOB** or **LOT** for Service.
In rare cases you may need to use a different UOM.

34. Use Magnifying glass to search alternate

The Look Up UOM page displays.

This table can be sorted by Unit of Measurement, Description or Short Description.

35. Select your UOM

The Purchase Order page displays.

36. Enter Category

The Look Up Category page displays.

Once again you can sort by Category (Number) or Description. And since there are more than 300 you may need to filter your search.
As an example for a Printer. Use Description Contains the first few letters of Printer PRI. Select the category you desire and click on it.

*Note: If you can not locate a suitable category call Mike Walker in Purchasing and he can assist you and in some cases create a new category to satisfy your needs.*

Note that the quantity is now defaulted both in your schedule and distribution.
37. Enter the price or your best guess for the cost of the item or service.  
Note: If unknown please enter $100 and then click on the refresh button at the bottom left of the panel.

This will populate the amount in the schedule line as well as the distribution line.

38. Click the Add Comments link.
The PO Header Comments page displays.

This is the area that was previously called Header Comments.

39. Click the Copy Standard Comments link

The Standard Comments page displays.

Note:

- The default is no longer Cut and Paste as it was in 8.4, but now reads Copy Comment.

- In an express PO there are now three types of comments. Standard Comments (STD), Hazardous Materials (HAZ) and new to 9.0 Unique comments.

40. In almost all cases you will select STD (This will populate the Comment ID drop down)

41. Click the Comment ID Drop Down icon
42. Select **D&V**

*Note: A change has occurred here in that a single comment gives you the department contact, the vendor information and attachment.*

43. Click OK
The PO Header Comments page displays.

44. Enter the information requested
45. Add a space after the last entry

Note: This space will prevent run in to the comments if you need to add any other information manually.

46. Check the three boxes under the comments (Send to Vendor, Shown at Receipt and Shown at Voucher)

47. Click OK

48. Click the Spell Check icon

If no misspellings are found you will receive this message.
49. Check the Send to Vendor, Shown at Receipt and Shown at Voucher boxes

50. Click OK

The Purchase Order page displays.

51. Click Save

If you do not have approver Authority place on hold, notify your approving official so they can approve the PO.
Print an Express PO

Navigate to Purchasing > Purchase Orders > Review PO Information > Print POs

The Purchase Orders Print page displays.

1. Click the Add a New Value tab

2. Enter Run Control ID (No spaces are allowed)

3. Click Add

4. Select
   - On Hold AND Not On Hold for Hold Status
   - Recycled AND Valid Chartfields for Chartfields for Chartfields
   - Changed and UnChanged Orders for Change Orders
   - Line No. for Sort By

5. Enter 1 for Number of Copies
6. Enter the PO number you wish to print

7. Set the Business Units to HW001

8. Click Run

The Process Scheduler Request page displays.

9. Click OK

The Purchase Orders Print page displays.

Note that Process Instance is populated which is found under the Run Button.

10. Click the Process Monitor link

The Process List page displays.

Your instance should be the most recent item.

11. Click the Details link
12. Click the View Log/Trace link

13. Click the PDF file link
If you need a copy for your files, you can print this one.

If the PO is still open and if you notice any items that need to be changed, you can do so by going back to your PO.
Print an Express PO Prior to Approving it

1. Click the View Printable Version link

You will receive this message.

2. Click OK

Navigate to People Tools > Process Scheduler > Process Monitor

The Process List page displays.

Your PO should be the most recent SQR Report on your process list.

3. Click Refresh until Run Status reads Success and Distribution Status reads Posted

4. Click the Details link

The Process Detail page displays.

5. Click the View Log/Trace link
The View Log/Trace page displays.

6. Click the PDF link

7. Print your PO

Whom to Contact for Help?
For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).