High Level Description

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Overview

The Purchase Order is created by the Purchasing Department from an Express PO and used to order requested materials or services.
Create a Purchase Order with Asset

Navigate to Purchasing > Purchase Orders > Add/ Update PO’s (This differs from 8.4 where you used Express PO.)

1. Click the Find an Existing Value tab

The Purchase Order page displays.

2. Enter PO or scroll down to Search
The Search Results page displays.

3. Click your Approved PO

The Purchase Order page displays.

4. Verify that the order is on Hold from Further Processing

Note: This location has changed from 8.4 where it was located in Header Details.

The PO Header Details page displays.

5. Check Hold for Further Processing box

Note

- Suggest that we leave the PO on HOLD until everything is complete.
- Save at any time. Being on hold has no effect except to prevent a process from being run against the PO such as Budget Check or Dispatch.
The Purchase Order page displays.

**Vendor & Buyer Look up**

6. Click the magnifying glass next to Vendor ID or Assign to…

The Look Up Vendor ID page displays.

7. Search by a Short Name or a Vendor ID Number

Note: In Vendor ID and Short Vendor Name use the pull down and select contains.

8. Use partial numbers or names as appropriate

Note: The search will return a selection of names.

The Vendor or a selection of vendors will show.

9. Double click on the correct one
The Purchase Order page displays.

10. Change Buyer to your name

The Look Up Buyer page displays.

11. Scroll Down to find your Buyer Name

12. Double Click the Name

This will often give you a warning.

13. Click OK for the first notice

The Default Values warning is shown. Answering OK will reset chart fields and delivery location. Sometimes you will need to click NO

14. Click Cancel
The Purchase Order page displays.

15. Enter Description

Note that the location of the description expansion is not located to the right of the description but to the left. It also does not contain the magnifying glass.

To reinforce this if this is the first time you have accessed these screens then customize the lines.

16. Click the Customize link

The Personalize Column and Sort Order page displays.

17. Select the items you do not need to see on the PO screens (These include Column 6, Backorder Status, Vendor’s Catalog, Manufacture ID, Manufacturer’s Item ID, UPN ID, Replenish Code, Withholding, Release, Milestone Line, Rebate ID)

18. Mark them as hidden
19. Once hidden items are marked you may move them off the PO screens by selecting the Right arrow

This moves the marked columns into a hidden status.

20. Click OK

The Purchase Order page displays.

21. Click the icon to left of Description
The Details for Line 1 page displays.

22. Check Description and add to or correct as necessary.

Note: Remember the first few words are the most important. And that you have 254 spaces to use in your description.

23. Click the Spelling Check icon

The Spell Check page displays.

Note that spelling error or problem is highlighted.

24. Click OK

The Purchase Order page displays.

25. Click Attributes
26. Select Physical Nature

**Note:** You must select Goods for Commodities and Goods. And if this is a BPO for Service this is also where you check the Amount Only Box.

This can also be done by selecting the Attributes Tab on the main screen.

27. As before select Goods or Services

28. If appropriate, select Amount Only

29. Enter Quantity, Unit of Measurement (UOM), Category and Price

**Note:** If UOM or Category is not in the drop down box, advise Mike and he will create one and advise you of the information when it has been done.
The Look Up Category page displays.

When searching for a category it is best to do your search by description contains.

The Purchase Order page displays.

30. Click the Schedule icon

The Schedules page displays

You may wish to customize this area to fit your preferences.

31. Enter price, and Ship To (Ship To is the campus-i.e. main, Contra Costa or Oakland)

32. Click Sales Tax icon to verify Tax
The Sales/Use Tax Information for Schedule 1 page displays.

Tax Defaults from Vendor. If it is not shown as Taxable and should be vendor needs to be set up as taxable before you precede. This is especially important for multi line purchase orders.

Note: The actual tax on the line is shown on this screen.

The Schedules page displays.

33. Click the Distribution icon

The Distributions for Schedule 1 page displays.

As before you will need to customize this screen especially moving location to the front of the schedule. Remember Change is not a room number.

34. Change location to a real room number for delivery and follow-up

35. Verify the chart field information

Note: As a minimum it must contain an account, a fund and a dept id.
36. Click the Asset Information tab

37. Enter AM Unit and Profile ID

38. Click OK

The Schedules page displays.

39. Click the Return to Main Page link

The Purchase Order page displays.

40. If all is in order, then remove the Hold from Further Processing

41. Click the Budget Check icon
Once the budget check has processed it will read valid.

42. Click the Dispatch button *(Not recommended)*

The Dispatch Options page displays.

43. Check the Print PO Item Description box

44. Select WEB for Type and PDF for Format

45. Click OK

You will receive this notice. It doesn’t matter which you check, you are still going to have to go to Process Monitor to locate.

The Purchase Order page displays.

Notice Dispatch button is now hidden.
Preferable to go to Menu Dispatch PO s. You will need to set up run control the first time you do this.

The Dispatch Purchase Orders page displays.

46. Click the Add a New Value tab

47. Enter Run Control ID

48. Click Add
49. Enter information as shown

50. Enter the PO number you wish to dispatch

51. Click Save

52. Click Run

This will take you to the Process Scheduler Request.

The Process Scheduler Request page displays.

53. Check the PO Dispatch/Print box

54. Click OK

The Dispatch Purchase Orders page displays.

This will give you a Process Instance.

55. Click the Process Monitor link
The Process List page displays.

56. Click Refresh until Run Status is Success and Distribution Status is Posted

57. Click the Details link

The Process Detail page displays.

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

59. Click the PDF file link

The Purchase/Service Order PDF displays.

Process as before. This is a PDF.

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).