



Test History

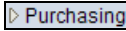
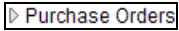

Date	Tester	Pass/Fail	Notes

Time to Test

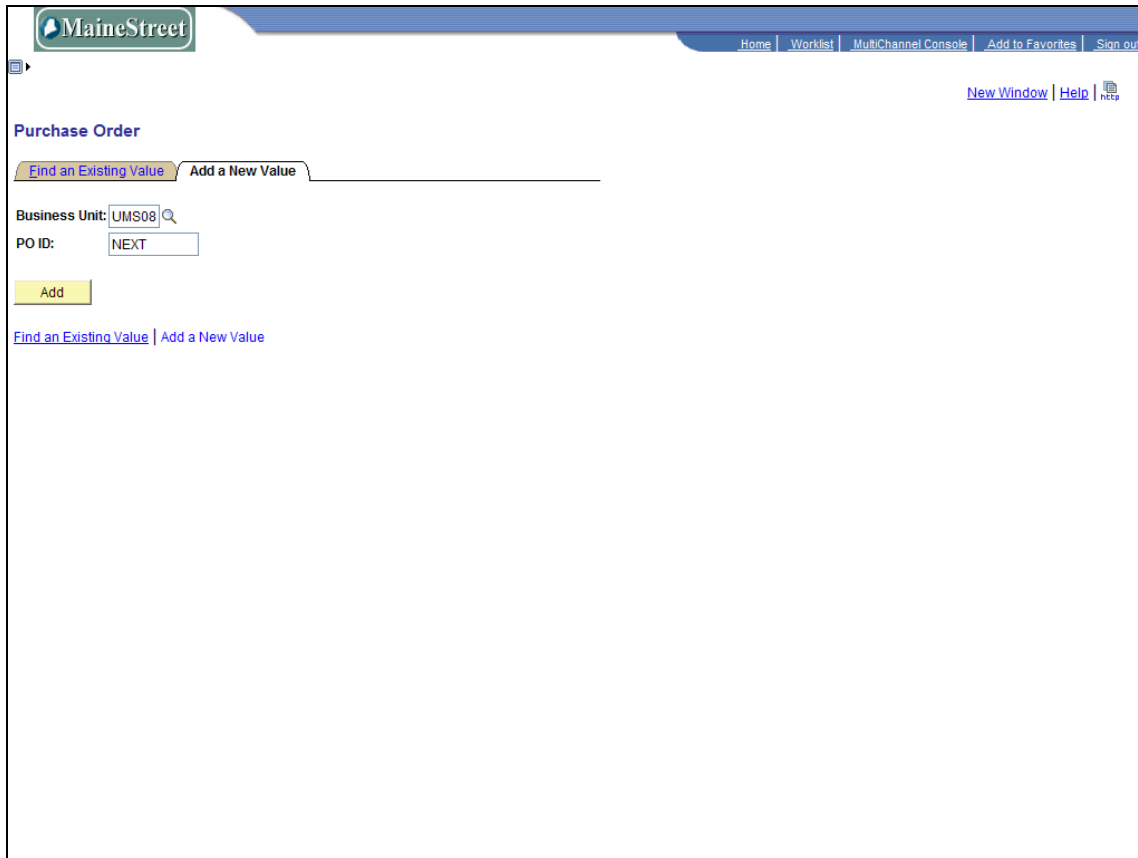
Estimated Time	
Actual Time	

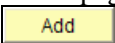
Test Setup

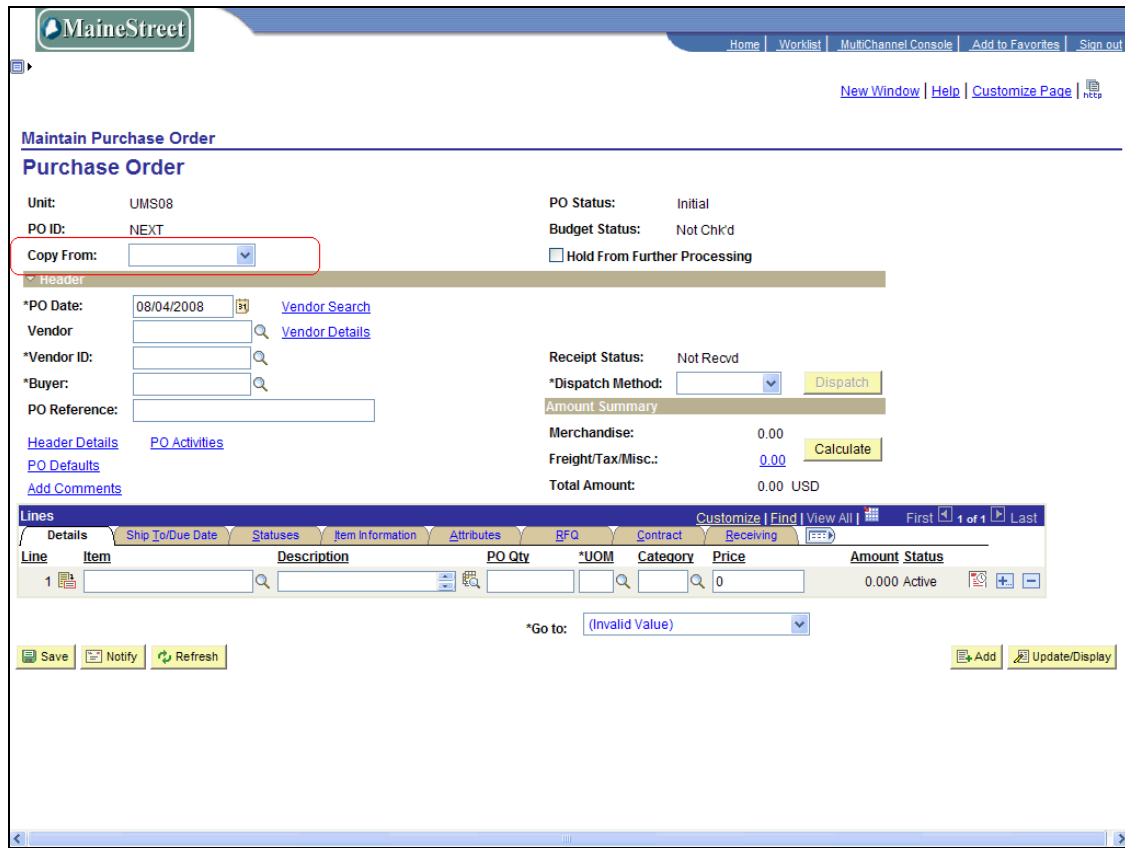
Test Navigation

Step	Action	Input	Expected Results	Pass	Fail
1.	From the Financials menu, click the Purchasing link. 				
2.	Click the Purchase Orders link. 				
3.	Click the Add/Update POs link. 				

Test Procedure



Step	Action	Input	Expected Results	Pass	Fail
4.	On the Purchase Order Add a New Value page, click the Add button. 				



Step	Action	Input	Expected Results	Pass	Fail
5.	On the Maintain Purchase Order page, click on the drop-down arrow in the <i>Copy From</i> field.				

Test Document

Creating a PO from Copying a PO



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Maintain Purchase Order

Purchase Order

Unit: UMS08 PO Status: Initial
 PO ID: NEXT Budget Status: Not Chk'd
 Copy From: ▼ Header Hold From Further Processing

***PO Date:** [Vendor Search](#)
Vendor: [Vendor Details](#)
***Vendor ID:**
***Buyer:**
PO Reference:

[Header Details](#) [PO Activities](#)
[PO Defaults](#)
[Add Comments](#)

Receipt Status: Not Recvd
***Dispatch Method:**
Amount Summary
 Merchandise: 0.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 0.00 USD

Lines Customize | Find | View All | First 1 of 1 Last

Details [Ship To/Due Date](#) [Statuses](#) [Item Information](#) [Attributes](#) [RFQ](#) [Contract](#) [Receiving](#) [EST](#)

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	0.000	Active

*Go to:

Step	Action	Input	Expected Results	Pass	Fail
6.	Select Purchase Order from the list to access the Copy Purchase Order from Purchase Order page. <input type="text" value="Purchase Order"/>				



Maintain Purchase Order

Copy Purchase Order from Purchase Order

PO Selection Criteria

PO ID:

Vendor:

Vendor ID:

Buyer:

PO Reference:

PO Date:

Status:

Origin:

Item ID:

Category:

Select PO

Details | More Details | Customize | Find | View All | First | 1 of 1 | Last


Select	PO ID	PO Date	PO Status	Vendor ID	Vendor
<input type="checkbox"/>					

Step	Action	Input	Expected Results	Pass	Fail
7.	<p>Use the Copy Purchase Order from Purchase Order page to select criteria to search for an existing PO and then select the desired PO to copy.</p> <p>Enter relative information like the Purchase Order ID, Vendor ID, and buyer information from the purchase order that you want to copy. The copy function only enables you to copy from one purchase order. If you attempt to copy more than one purchase order, the most recently copied purchase order overrides the previous purchase order information.</p> <p>For this example, enter a PO ID in the PO ID field.</p>				

Test Document

Creating a PO from Copying a PO



Step	Action	Input	Expected Results	Pass	Fail
8.	Click the Search button. 				

PO Selection Criteria

PO ID: PO Date: BY

Vendor: Status:

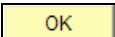
Vendor ID: Origin:

Buyer: Item ID:

PO Reference: Category:

Select PO Customize | Find | View All | First | 1 of 1 | Last

Select	PO ID	PO Date	PO Status	Vendor ID	Vendor
<input checked="" type="checkbox"/>	8000000936	03/28/2008	Dispatched	0000044086	LINDENMEYR-001

Step	Action	Input	Expected Results	Pass	Fail
9.	Notice that the details of the PO are displayed. Select this PO ID to create a PO. Click the Select checkbox. <input type="checkbox"/>				
10.	Click the OK button. 				

Maintain Purchase Order

Purchase Order

Unit: UMS08 PO Status: Pend Appr
 PO ID: NEXT Budget Status: Not Chk'd
 Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 08/04/2008 [Vendor Search](#)
 Vendor: LINDENMEYR-001 [Vendor Details](#)
 *Vendor ID: 0000044086 LINDENMEYR MUNROE
 *Buyer: 0099999 Buyer Name
 PO Reference: [Text Box]

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Add Comments](#)

Receipt Status: Not Recvd
 *Dispatch Method: Print [Dispatch](#)

Amount Summary

Merchandise: 735.00
 Freight/Tax/Misc.: 0.00 [Calculate](#)
 Total Amount: 735.00 USD

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		Change Order 6/14 8.5 x	21.0000	CS	MISC	35.00000	735.00	Active

*Go to: (Invalid Value) [Dropdown]

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

Step	Action	Input	Expected Results	Pass	Fail
11.	<p>The Purchase Order page reappears, displaying details of the selected PO.</p> <p>The PO Date field should automatically default to the current system date. You can override the purchase order date.</p> <p>Click the PO Defaults link.</p> <p>PO Defaults</p>				

Test Document

Creating a PO from Copying a PO



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Maintain Purchase Order

Purchase Order Defaults

Unit: UMS08 PO ID: NEXT Vendor: LINDENMEYR-001

Default Options

Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category: [] Unit of Measure: []

Schedule

Ship To: 8000000005 UC at Rockland - Desjardins Ultimate Use Code: []

Ship Via: BESTWAY Original Promise Date: []

Arbitration: [] Freight Terms Code: DEST_ALLWD

*Distribute by: Quantity One Time Address []

Distribution

SpeedChart: []

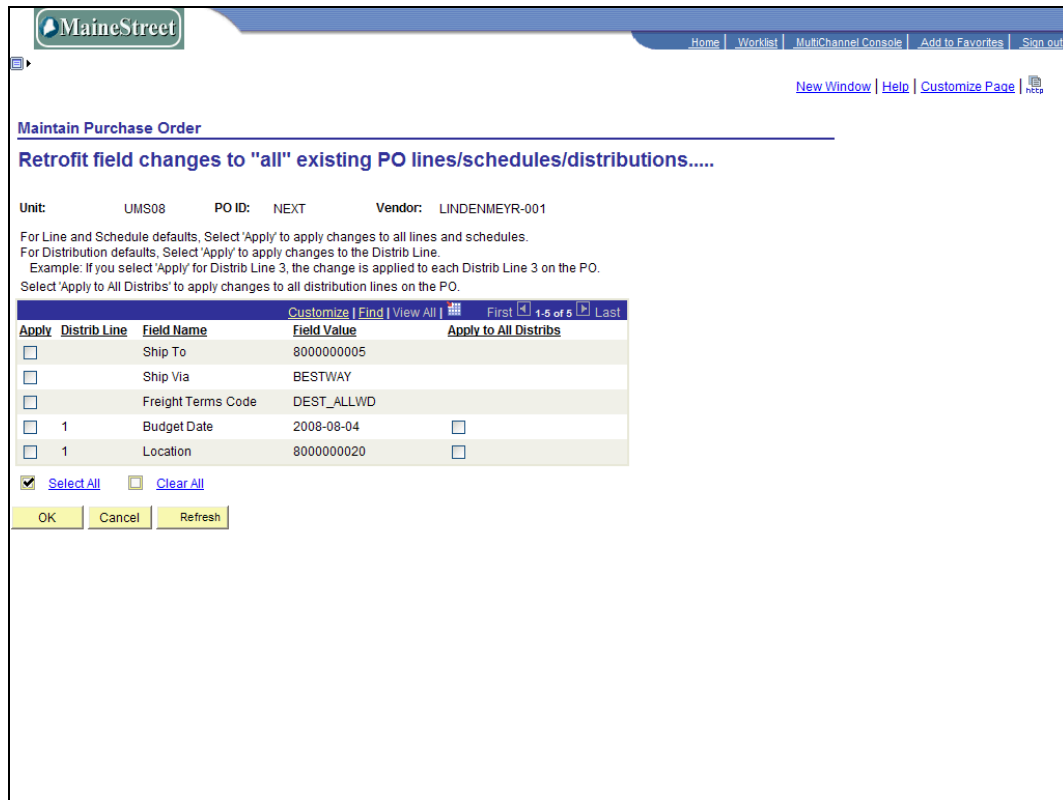
Distributions

Chartfields Asset Information

Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Bud Ref	Project	Affiliate	Fur
1	100.0000	UMS08	[]	[]	[]	[]	[]	[]	[]	[]	[]	[]

OK Cancel Refresh

Step	Action	Input	Expected Results	Pass	Fail
12.	<p>Use the Purchase Order Defaults page to override the defaults set at the business unit, buyer, or vendor level and set defaults when none exist.</p> <p>If you select the Default option, the new default value that you enter on this page is assigned to the given field if no other value is assigned from prior defaults.</p> <p>If you select the Override option, the new value that you enter on this page overrides any value that is assigned from prior defaults. Only non-blank values are assigned.</p> <p>Make any necessary changes to the PO and click OK.</p> <p>OK</p>				



Maintain Purchase Order

Retrofit field changes to "all" existing PO lines/schedules/distributions.....

Unit: UMS08 PO ID: NEXT Vendor: LINDENMEYR-001

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.
Select 'Apply to All Distribs' to apply changes to all distribution lines on the PO.

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
<input type="checkbox"/>		Ship To	8000000005	
<input type="checkbox"/>		Ship Via	BESTWAY	
<input type="checkbox"/>		Freight Terms Code	DEST_ALLWD	
<input type="checkbox"/>	1	Budget Date	2008-08-04	<input type="checkbox"/>
<input type="checkbox"/>	1	Location	8000000020	<input type="checkbox"/>

[Select All](#) [Clear All](#)

Step	Action	Input	Expected Results	Pass	Fail
13.	<p>If you made changes or added values to the defaults on the previous page, when you exit the page, you should be prompted with the Retrofit field changes to "all" existing PO lines/schedules/distributions... page.</p> <p>This page enables you to retrofit the default field value changes to lines, schedules and distributions on a purchase order without having to apply them to each area. You can make the changes once and apply as many of them as you want to the transaction.</p> <p>Select the Apply option to carry the default field value change to the line or schedule level instead.</p>				
14.	<p>Click the OK button to return to the Purchase Order page.</p> <p><input type="button" value="OK"/></p>				

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Maintain Purchase Order

Purchase Order

Unit: UMS08 PO Status: Pend Appr
 PO ID: NEXT Budget Status: Not Chk'd
 Copy From: Hold From Further Processing

Header

*PO Date: 08/04/2008 [Vendor Search](#)
 Vendor: LINDENMEYR-001 [Vendor Details](#)
 *Vendor ID: 0000044086 LINDENMEYR MUNROE
 *Buyer: 0099999 Buyer Name
 PO Reference:

[Header Details](#) [PO Activities](#) [Add ShipTo Comments](#)
[PO Defaults](#) [Add Comments](#)


Receipt Status: Not Recvd
 *Dispatch Method: Print
Amount Summary
 Merchandise: 735.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 735.00 USD

Lines

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		Change Order 6/14 8.5 x	21.0000	CS	MISC	35.00000	735.00	Active

*Go to: (Invalid Value)

Step	Action	Input	Expected Results	Pass	Fail
15.	On the Purchase Order page, click the Save button. 				



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PO Dispatch Routing

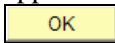
Business Unit UMS08
PO Number NEXT

When the dispatch method on the PO is set to print, the employee named below will receive a pdf file containing the actual PO for printing and sending to the vendor. You can change the employee to whom the pdf file is sent by selecting another name using the prompt. Click OK when done.

Note: If the PO Type is Prepaid, the pdf file is sent to the user for your campus who is responsible for getting the check cut that needs to go with the order. This name cannot be changed.

User ID

[Main Content](#)

Step	Action	Input	Expected Results	Pass	Fail
16.	The PO Dispatch Routing page appears. Click the OK button. 				

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Creating a PO from Copying a PO



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Maintain Purchase Order

Schedules

Unit: UMS08 Vendor: LINDENMEYR-001
 PO ID: 8000000973 PO Date: 08/04/2008
 PO Status: Pend Appr

[Return to Main Page](#)

Line	Item	Description	PO Qty	CS	Amount	USD
1			21.0000	CS	735.00	USD

[Schedules](#) | [Details](#) | [Statuses](#) | [Shipment](#) | [Matching](#) | [Receiving](#) | [Freight](#) | [RTV](#)

Sched	*Ship To	*PO Qty	Price	Amount	Status
1	8000000005	21.0000	35.00000	735.00	Active

[Add ShipTo Comments](#)

Save | Notify | Refresh | Add | Update/Display

Step	Action	Input	Expected Results	Pass	Fail
17.	Notice that a PO ID has been assigned.				
18.	End of Procedure.				

Additional Validation