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I. Introduction

In the UMS Financial System, each staff member with a responsibility in financials is assigned one or more roles. A role determines what tasks the staff member can perform in the system and what information he or she can view. This manual covers certain tasks and access capabilities associated with the Campus Administrator and Super Approver roles.

A Campus Administrator can perform a large variety of high-end tasks in the Financial system. Most of these tasks are documented in other manuals: Accounts Payable, Requisitions and Receiving, Requisition Approval, Security management, etc. In this manual we do not repeat the content in other documents, but include just those topics not covered elsewhere.

The Super Approver role overlaps the Campus Administrator role in so far as handling purchase orders is concerned. Thus most of the content of this manual applies to Super Approvers as well as to Campus Administrators.

A Super Approver also acts as a Requisition Approver – for information on that role, please refer to the Requisition Approval manual.

In each section below we will state which tasks are limited to Campus Administrators and which can be performed by both Campus Administrators and Super Approvers.

Overview of the Purchasing Process
Here is a simplified diagram of the purchasing process:
The process occurs in stages as shown in the above diagram:

- A **requisition** is entered.
- The requisition is **approved** and **budget checked**.
- A **purchase order (PO)** is created (**sourced**) from the requisition.
- The PO is **dispatched** (sent) to the vendor.
- The vendor ships the order and sends an invoice.
- A **voucher** is entered based on the invoice.
- The contents of the shipment are recorded in a **receipt**.
The purchase order, voucher and receipt are matched (compared). If matching is successful, the vendor will be paid. If there are matching problems (match exceptions), the errors must be resolved before payment can be made.

As a Campus Administrator or Super Approver, you may be involved in the above process in several ways:

(a) You can create purchase orders directly without entering a requisition.

(b) You can run several batch processes that are normally run automatically several times a day: Approval Workflow (Campus Administrators only), Sourcing a PO from a requisition, Budget Checking POs, PO Dispatch.

(c) You can enter change orders for existing purchase orders.

(d) You can finalize a purchase order, and as a Campus Administrator you can reconcile purchase orders.

(e) Campus Administrators can select standing orders for review and renewal.

In addition to the creation and management of purchase orders and the running of certain batch processes, this manual covers miscellaneous tasks that are performed by Campus Administrators: standing order review, use of the sourcing workbench and reassignment of worklist items.

II. Entering a Purchase Order Directly

A. Introduction

Normally, a purchase order is created automatically by the Financial System from an approved, budget checked requisition. However, there may be situations where a purchase order must be created directly. A Campus Administrator or a Super Approver is able to perform that function. A purchase order can be entered directly, either using the “Maintain Purchase Orders” or the “Express POs” menu items.

Here is an image of the Financial system menu for purchase orders:
This menu is the same for both Campus Administrators and Super Approvers with the exception of the “Reconcile POs” item which is only for Campus Admins. The two menu items that are used to create purchase orders directly are “Express POs” and “Maintain Purchase Orders.” They are fundamentally the same, but the Express item presents the data entry form in a more compact way.

Required data for a purchase order is the same as for a requisition (refer to the Requisitions and Receiving manual): Vendor and Vendor Location, Buyer, Item Descriptions, Unit of Measure, Category, Quantity, Unit Price, Chartfields, Ship To address, Dispatch Method, Payment Terms, Freight Terms, Ship Via Code, PO Type.

B. Maintain Purchase Orders

Navigation:

Purchasing > Purchase Orders > Maintain Purchase Orders

You will get:
Note the two tabs in the above image. You can use the **Find an Existing Value** tab to search for existing purchase orders.

The correct Business Unit should appear automatically. Make sure the **Add a New Value** tab is selected and click the **Add** button. You will get a blank purchase order form:

Fill in the vendor information. You need the vendor ID and the correct location. Refer to the Requisitions and Receiving manual for a discussion of how vendor locations relate to ordering and remitting addresses.

Search for the vendor ID using the lookup button following either the Vendor or the ID fields. For more information on the vendor you have selected, click the **Details** button. The **Lookup** link provides an alternative way of searching for a vendor.

To select the correct vendor location, click the **Details** link:
Note the lookup buttons next to the Location and Terms fields in the above image. Use these to select the vendor location and payment terms. Click **OK** to return to the PO form page.

Fill in an employee ID in the Buyer field. Use your own employee ID or that of a person with a buyer role, such as a requisitioner.

Click the **Header Details** link at the bottom of the PO form page:
In this page you can select the PO Type (refer to the Requisitions and Receiving manual for an in depth discussion of PO Types) and the Dispatch method. The default dispatch method is Print, but other choices are FAX, E-mail and Phone. Please check the Requisitions and Receiving manual for special handling of these alternative dispatch methods.

The Billing Location and Accounting Date should normally never be changed. Exchange rate is not an issue since the only currency in use is US dollars.

The “Hold From Further Processing” checkbox can be used to keep the PO from being processed by the automatic budget check and dispatch processes. However, if the PO is dispatched using the …More… menu (see below), the hold will be removed and the PO will be dispatched.

Click [OK] to return to the PO form page.

Click the Defaults link to set the Ship To address, Ship Via code and Freight Terms code. You can set the default Unit of Measure, Category and Chartfields here as well. These settings will automatically apply to all the item lines in the purchase order unless you override them in the line.
Note that you can set up more than one distribution line in the PO Defaults page if you want to distribute the charge for the PO across multiple chartfield combinations. Refer to the Requisitions manual for more on this issue.

Click OK.

The Kit, Item Search and Catalog links are not used. For an explanation of the Header Comments and Line Comments links, refer to the Requisitions manual. The Line Details link is not normally used, except to specify Amount Only (see the Requisitions manual).

Fill in the item information in the Lines area of the PO. You can add more lines by clicking the button on the right. Each line must contain a Description, PO Quantity, Unit of Measure, and Category. The UOM and Category may default in if you have entered them in the Purchase Order Defaults page (see above).

The Item field is not used.

To enter price information for the lines, click the Schedule tab. In the example shown below, there are three lines in the PO. Enter the unit price for each item in the Price field on the corresponding schedule line. Note that you can set a different Ship To location code for each item line if needed.
Using the + button you can create multiple schedule lines for each item line in the PO. If you do that you can set different Ship To addresses for portions of the order for an item. For example, you order 10 desks and have 4 shipped to one address and 6 to another. You would need two schedule lines for the one PO line.

At the bottom of the Schedule tab page, are links:
In particular, note the Distributions link which will enable you to set the chartfield combinations used for each schedule line. For information on how to enter multiple chartfield combinations, see the Requisitions and Receiving manual.

If you want to enter a purchase order line with no encumbering, use the special Account chartfield value of 16010 in the distribution for that line.

When you have entered all the required information, click the Save button. This assigns a 10-digit purchase order ID to the PO, and it is ready to be budget checked and dispatched (normally handled by the automatic processes, but see below for manual budget check and dispatch).

**C. Entering an Express PO**

**Navigation:**

Purchasing > Purchase Orders > Express POs

The following page will appear:
Make sure the tab is selected. Your Business Unit should default in; if not, use the lookup button to select it. Leave the Purchase Order field set to NEXT. The system will assign a purchase order ID number automatically. Click .

The information required for an Express PO is the same as described in the previous section. Please refer to the Requisitions and Receiving Manual for more details.
The principal difference between the Express PO form and the form you get with Maintain Purchase Orders is that the schedule and distribution lines appear on the main form page.

### D. Creating Prepaid Orders

A Prepaid Order is the mechanism to use when a check needs to go with a Purchase Order to the vendor, whether it is a check for the full amount of the order or a partial payment (deposit, down payment, retainer etc.)

**For an order that is completely prepaid:**

Create the Purchase Order as you normally would. In the examples below we will use the Express PO process:

![Express Purchase Order](image)

Click the **Header Details** link.
Enter or select the **PO Type** of **PrePaid**. Also select the **Dispatch Method** of **Print**. Click **OK**. You will be returned to the Express Purchase Order page.

Click on the **Header Comments** link. On the PO Header Comments page, click the **Standard Comments** link. Select the **Std Type** of **MIS**. Then select the **Comment ID** of **CHK** (Check Enclosed).

When the order is printed, it can be used as the mechanism to create the voucher for the check. Refer to the Business Process for creating Prepaid Vouchers to obtain a separate check and get it returned to the office holding the PO.

**For an order that is only partially prepaid, i.e., when a deposit, down payment or retainer is needed.**

Create separate PO lines for the deposit and the remainder of the order amount. The standard comment is applied only to the deposit line:
Select the line by clicking in the Sel box next to the line that covers the deposit and click on the Line Comments hyperlink. On the PO Line Comments page, click on the Standard Comments link.
Select the **Std Type** of **MIS**. Then select the **Comment ID** of **CHK** (CHECK ENCLOSED).

When the invoice is received for the balance of the order, it can be entered against the remaining line(s).

**E. The …More… Menu**

Whether you use Express PO or Maintain Purchase Orders to create your PO, at the bottom right of the form page you will see the “…More…” menu. This is a pull-down menu. Click the triangle and you will see:

As you see above, there are 35 items in this menu, many of them quite useful. Budget Check and Dispatch PO can be used to hurry along the PO rather than waiting for the normal automated processing to occur.

**III. Batch Processes**

**A. Introduction**

If you refer to the purchasing diagram at the beginning of this manual, note the “Budget Check”, “Source to a PO,” “Dispatch to Vendor” and “Matching” boxes. Note also the link that moves a requisition to an approver for review. These all represent processes that run automatically several times every work day. As a
Campus Administrator, you can run these processes manually. As a Super Approver you can run some of the processes.

Why might you want to run a process manually? You might have an emergency situation where you need to dispatch a purchase order immediately, or perhaps over a weekend.

The steps to run a process are similar for all processes. We will look at the PO Auto Sourcing process first, as it has the most parameters to set.

### B. Sourcing a Requisition to a Purchase Order

The process that converts an approved, budget checked requisition to a purchase order is called “sourcing.” There are several steps to the process. For manual processing, the easiest method is to use the “PO Auto Sourcing” item in the menu:

![Menu](image)

Running a process is similar to running a report. You must first create a “Run Control ID” or select an existing one:
To create a new Run Control ID, click the **Add a New Value** tab and enter a name for the new ID. You should pick a name that refers to the process you want to run, so the next time you can find it easily. Click **Add**. The next time you want to run this process, you can search for the ID you have created. The system will remember the settings from the last time you used the Run Control ID. Your Run Control IDs are personal to you.

Having selected or created a Run Control ID, you will see a page where you can set parameters for the process. In this case we want to check all the check boxes except the two center ones: PO Contracts and Build Inv Demand. Then we must specify the Business Unit and, if we wish, the Buyer. If we want to narrow our requisition selection further, we can use the ReqSorc tab.
When all parameters have been set, click the **Run** button. You get the Process Scheduler Request page where for some processes or reports you can set more parameters. In our example, there is only one choice in the Process List. The correct Server will be selected automatically:

![Process Scheduler Request](image)

Click **OK**. This will return you to the previous page, but now there will be a Process Instance number assigned to the job:

![Process Monitor](image)

In this page, click the Process Monitor link:
Note the Run Status of “Success.” The process is complete. If you don’t see “Success” right away (you see “Queued”, “Initiated” or “Processing”), wait a few minutes and click the button.

Once a requisition has been sourced to a purchase order, you may need the PO number (for example, to phone in to a vendor). This information can be obtained using the Document Status inquiry for the requisition (refer to the Requisitions and Receiving manual), or you can use the Sourcing Workbench.

Navigate:
Purchasing > Purchase Orders > Build Source POs > Sourcing Workbench

You can enter the process instance number you received from the Sourcing process, or the requisition ID. Click . The PO number is listed on the far right:
C. Budget Checking and Dispatch

Budget checking establishes pre-encumbrances on requisitions, and encumbrances when done on purchase orders. An approved requisition must be budget checked before it can be sourced to a purchase order, and a purchase order must be budget checked before it is dispatched to the vendor. Super Approvers can budget check purchase orders, but not requisitions.

To manually run the requisition budget check process, navigate to:

Purchasing > Requisitions > Budget Check

As we saw in the previous section, either select an existing Run Control ID or create a new one. You will see:
Fill in something in the Description field. In the Process Options area, you can select a specific requisition, or select by requisitioner, by date, etc. Simply pull down the menus and choose “All” or “Value” etc. In the example above we see the Value choice for the requisitioner – this gives us a field where we can specify the requisitioner’s emplid.

Having filled in the selection criteria, click the Run button. This brings up the process scheduler request page:
Click **OK**. This returns you to the Run page with a process instance number assigned. Continue as discussed in the section on PO Auto Source.

To budget check a purchase order you have created with Express PO or Maintain Purchase Order, use the ...More... menu as shown above and select the Budget Check menu item:

Alternatively, click the budget check button at the top right: 📊.
The …More… menu can be used to dispatch a single purchase order to the vendor, or you can use the Dispatch POs process: **Purchasing > Purchase Orders > Dispatch POs**

Select or create a Run Control ID. You see:

![Dispatch Purchase Orders](image)

Fill the parameters and click **Run**. In the example above, we have selected one purchase order to dispatch. You will see the process scheduler request page:

![Process Scheduler Request](image)
Select “PO Dispatch Print” as shown, and click the OK button. Proceed as described in section A.

You can dispatch a single purchase order by using the …More… menu at the bottom of the PO form page (see section on …More… above). This is the same process that a requisitioner can use to re-dispatch a purchase order.

Locate the purchase order you wish to dispatch:

**Purchasing > Purchase Orders > Maintain Purchase Orders**

Enter search criteria, search and click the PO you want to dispatch:

```
<table>
<thead>
<tr>
<th>Business Unit:</th>
<th>UMS08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order:</td>
<td>begins with UMS08</td>
</tr>
<tr>
<td>Purchase Order Date:</td>
<td>2004/11/03</td>
</tr>
<tr>
<td>PO Status:</td>
<td>Approved</td>
</tr>
<tr>
<td>Short Vendor Name:</td>
<td>Approved IKON FINAN-001</td>
</tr>
<tr>
<td>Vendor ID:</td>
<td>00000000016</td>
</tr>
<tr>
<td>Name 1:</td>
<td>Approved IKON FINAN-001</td>
</tr>
<tr>
<td>Buyer:</td>
<td>Approved IKON FINAN-001</td>
</tr>
<tr>
<td>PO Type:</td>
<td>Approved WILLIAM*AD-001</td>
</tr>
<tr>
<td>Purchase Order Reference:</td>
<td>Approved WILLIAM*AD-001</td>
</tr>
<tr>
<td>Department:</td>
<td>Approved WILLIAM*AD-001</td>
</tr>
</tbody>
</table>
```

Pull down the …More… menu and select Dispatch PO:
You get:

### Dispatch Options

**Dispatch Option**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Duplicate on PO:</td>
<td>N</td>
</tr>
<tr>
<td>Fax Cover Page:</td>
<td></td>
</tr>
<tr>
<td>Server Name:</td>
<td></td>
</tr>
<tr>
<td>*Output Destination Type:</td>
<td>WEB</td>
</tr>
<tr>
<td>*Output Destination Format:</td>
<td>PDF</td>
</tr>
</tbody>
</table>

- **Test Dispatch**
- **Print Changes Only**
- **Print BU Comments**
- **Print Copy**
- **Number Of Copies:**

If you select Test Dispatch, the PO will not be sent to the vendor, and it will have “UNAUTHORIZED” printed on it. If you put a “Y” in the “Print Duplicate on PO” box, the PO will be labeled as a duplicate (this is useful when the vendor requests a duplicate, or has lost the original PO). If the dispatch method is FAX or e-mail, you might want to print a copy – select the Print Copy box and enter the number of copies desired. The Server Name will be automatically selected – you don’t need to enter anything there.

Click **OK**. You will get a message:

Would you like to wait for confirmation that the PO Dispatch process has completed? (10208.44)

Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.
If you choose “No” you will be given the Process Instance number so you can later go to the Process Monitor to check the status of the process. And in either case you will get the usual message about which emplid will receive the PDF containing the purchase order (assuming the dispatch method is print or you have chosen to print a copy):

![PO Dispatch Routing Screen](image)

**D. Requisition Approval Workflow**

The Approval Workflow process assigns Approved status to requisitions with dollar amounts at or below the requisitioner’s dollar limit, and sends worklist tasks to approvers for those requisitions requiring manual approval.

Normally this process runs several times a day. However, Campus Administrators can run the process. Navigate to:
Purchasing > Requisitions > Approval Workflow

Select a Run Control ID as usual (or create one), and you will see:

![Approval Workflow](image)

Click [Run]. You get the process scheduler request page:

![Process Scheduler Request](image)

You must select the “Requisition Amount Approval” choice as shown above. Click [OK] and proceed as with the other processes.

E. Matching

Matching is the process that compares the purchase order, any receipts and any vouchers associated with the purchase order. If there are discrepancies in prices, quantities or vendor/location, and the price or quantity differences are over the tolerance levels, match exceptions are generated and the vendor won’t be paid until the exceptions are resolved. The resolution of most exceptions is the responsibility of the requisitioner/receiver, except in a few special cases where it lies with accounts payable.

Normally, the matching process is run several times a day during the week. However, as a Campus Administrator, you can run the process manually.
Navigate:

**Accounts Payable > Batch Processes > Vouchers > Match Request**

Select a Run Control ID as usual. You will see:

![Screenshot](image)

You must fill in the Description field. You can use the Options pull down menu to select how you want to choose the vouchers you are matching (matching is
always done based on vouchers). For example you could choose to match a specific voucher or all the vouchers for your business unit. Note that vouchers entered in a control group are not associated with purchase orders and therefore there is no matching for them.

Select the options and fill in any data such as business unit and/or voucher id. Click **Run**. You get the process scheduler request page:

![Process Scheduler Request](image)

As shown above, you must select “Matching Workflow.” This process will perform the matching and will send the match exception worklist items to the appropriate staff. Click **OK** and proceed.

**IV. Change Orders**

A Change Order is applied to a purchase order after it has been dispatched to the vendor. Both Campus Administrators and Super Approvers can apply change orders.

The following purchase order fields, when changed, result in Change Orders:

<table>
<thead>
<tr>
<th>PO Header:</th>
<th>PO Line:</th>
<th>PO Line Shipping Schedule:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Location</td>
<td>Cancel Status</td>
<td>Cancel Status</td>
</tr>
<tr>
<td>Buyer</td>
<td>RFQ ID</td>
<td>Due Date</td>
</tr>
<tr>
<td>Vendor Contact</td>
<td>RFQ Line Number</td>
<td>Freight Terms</td>
</tr>
<tr>
<td>Currency Code</td>
<td>Unit of Measure</td>
<td>Merchandise Amount</td>
</tr>
</tbody>
</table>
Adding additional lines will also result in a Change Order.

To create a change order, navigate:

**Purchasing > Purchase Orders > Maintain Purchase Orders**

Search for the PO you need to change, and make the requisite changes. Save the changed PO. The system will change the PO status from “Dispatched” to “Approved” and assign a change order number. The budget status will also be changed from “Valid” to “Not Chk’d”.

Be careful when you add a new line. Your default ship to address will be put on the line you’ve added. Remember that the ship to address for other lines on the PO may be different (for example, may be the default ship to address for the requisitioner). You may need to change the ship to address on the new line.

If the field on the PO where you want to make the change is not available for changing (you can’t edit the field), click in the upper right hand corner of the PO Form page. This should make the field editable.

To Budget check go to the PO Form page and click . If the budget check is successful, the budget status will change to “Valid”. Note that if the dollar amount is $25,000 or more, the order will need to be approved by the System Office.

The system will automatically dispatch the change order. The dispatched document will display “CHANGE ORDER”. The changed or added section will be in **bold**.

---

**V. Standing Order Review**

To avoid having to recreate your standing orders every year, the Financial system provides a way to review and update copies of the current standing orders for renewal in a new fiscal year.

A Campus Administrator will select the standing orders to be reviewed. E-mail is sent to the Requisitioners responsible for the standing orders. The Requisitioners review and update them. The updated orders are approved by a Requisition
Approver. The Campus Administrator completes the processing and the new orders are turned into purchase orders; the old standing orders are closed.

Navigate:
University of Maine System> Purchasing> PO Batch Processes> Create Req’s/Close PO’s

Add a new run control for this process or select one that you have already created. The following page will appear:
To create new requisitions, make sure the checkbox **Place New Requisitions in Hold From Further Processing** is checked. Select the correct Business Unit. Select the PO type form the drop down menu. Select the Accounting dates of the POs you want to copy. And enter the Accounting Date for the new requisitions.

Example: If you were creating requisitions for new Standing Orders for FY07 on March 31, 2006, your page would look like this:
Run Control ID: CREATE_REQS

This page will allow you to select purchase orders to create a requisition. You can also close any purchase order by checking the Close PO check box. When the Close PO check box is checked the application will only close purchase orders and not create new requisition.

Click the Run button. The following page will appear:

Click OK. The following page will appear:
When the Run Status is Success, you will have the requisitions for review. Refer to the Standing Order requisitions Business Process for instructions on how to use these new requisitions.

When you need to close the old Standing orders, simply check the Close POs checkbox, uncheck the Place New Requisitions in Hold From Further Processing and enter the Accounting Dates of the PO’s you want to complete. Click Run.

VI. Using the Sourcing Workbench to Fix Errors

If a requisition is entered without a vendor or a vendor location, the requisition can be saved, but a staging error occurs when the system attempts to source it to a purchase order. Campus Administrators and Super Approvers can use the Sourcing Workbench to fix the requisition, or to recycle it to the requisitioner.

Navigate:
**Purchasing > Purchase Orders > Build Source POs > Sourcing Workbench**

You will see:
Fill in search criteria and click the OK button. Note the choices shown above for Stage Status. If a requisition is missing vendor information, the Stage Status will be “Error” for that requisition.

You will get a list of the requisitions that match your criteria:
Click the select box of the one you want to examine and click the Selected Item Details link.

Note that the vendor and location fields are blank in our example, and the “Stg Status” pull down menu says Error. You can resolve this problem by selecting Reset/Purg in the pull down menu:
Click ![Save]. Now go to **Purchasing > Requisitions > Maintain Requisitions**, find the requisition in question and fill in the missing vendor/location or whatever other errors exist in the requisition. Save. The next time the PO sourcing process is run, the purchase order will be created. Note that the requisitioner will not be able to make the required changes because requisitioners do not have permission to change approved requisitions. The fix will need to be done by a campus administrator.

### VII. Reassigning Worklist Entries

A campus administrator can assign an alternate ID for a staff member who is out of the office, and can also reassign items that are already in the staff member’s worklist. This may be necessary if, for example, the staff person becomes ill and cannot do the reassigning him/herself.
Navigate:

PeopleTools > Security > User Profiles > User Profiles

User Profiles
Enter any information you have and click Search. Leave fields blank for a
full search.

Find an Existing Value | Add a New Value

Search by: [User ID] begins with [ ]

Search | Advanced Search

Find an Existing Value | Add a New Value

Enter the individual's emplid in the field and click [Search]. You will see:

User ID: 0014801
Description: Lee Honey

Workflow Attributes

Routing Preferences
- Worklist User
- Email User

Reassign Work

Total Pending Worklist Entries: 2

Save | Return to Search
There are two areas in this page: Workflow Attributes and Reassign Work. The Workflow Attributes area is used to automatically reassign any NEW worklist items to another empid during a defined time period. The Reassign Work area is used to reassign all EXISTING worklist items to another person.

In our example, this person has two items currently in his/her worklist. If we check the box next to “Reassign Work To:” and fill in an empid in the field, then click Save, those two items will be moved to the designated person’s worklist. You must make sure that whoever receives these worklist items has a role and security set up which allows him/her to perform the tasks.

Note that there is no way on this page to individually reassign current worklist items. Either all or none of the items will be reassigned.

To take care of future worklist items, fill in an empid in the “Alternate User ID” field, and specify a date range. Fill in the “Supervising User ID” field as well, since there are times when a notification is sent to a staff member’s supervisor (when worklist items time out, for example). Click Save.