

The Express Purchase Order User Manual

**The Spectrum+ System
Georgia State University**

**PeopleSoft Financials
Version 9.2**

(Revised 11/23/2020)

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CHAPTER 1: INTRODUCTION

1.1 PURCHASING OVERVIEW

Purchasing is the business process of procuring goods and services from suppliers in order to continue business operations.

IMPORTANT NOTE: As of 2012, most purchases are processed in Panther Mart. Do not enter a Purchase Order directly into Spectrum unless instructed to do so by the Purchasing Department, Disbursements, or if a wire transfer is required for payment.

For additional information regarding purchasing policies, consult the Purchasing Department's website at: <http://finance.gsu.edu/purchasing-and-business-services/>.

The training manual and policies for consultant services and travel can be found on the following websites:

<http://universityattorney.gsu.edu/legal-services/contracts/>

http://tools.finance.gsu.edu/files/gravity_forms/4-8e07dc847fdf28f377a979c5da20e99e/2015/02/Travel-ReportingandPayments.pdf

1.2 USE OF EXPRESS POs

The Express PO functionality provides a rapid-entry version of the Purchase Order page. This page enables users to view Lines, Schedules, and Distributions on a single page.

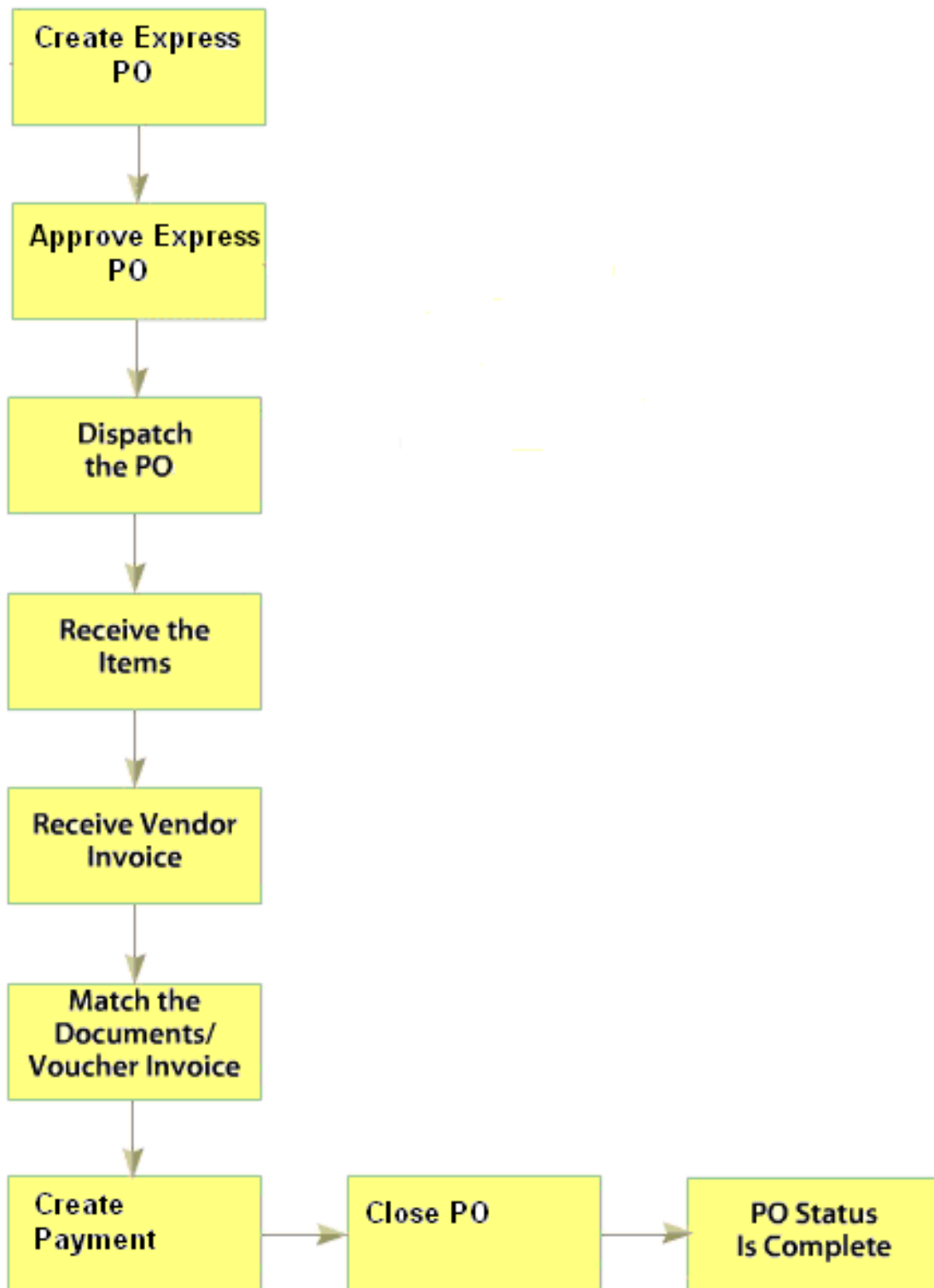
Georgia State has made the decision not to use Requisitions and the eProcurement module.

Departmental requesters will use the Purchase Order as their point of entry for requesting goods or services.

Requesters will enter Express POs through the Express PO page. The Express PO will go through workflow approval. After the Departmental approval, the Buyers in the Purchasing Department will be responsible for reviewing/updating and dispatching the final Purchase Order.

Upon completion of this manual, you will be able to enter an Express Purchase Order in the Spectrum 9.2 System, make corrections, and perform online inquiries and queries.

1.3 Primary Functions of the PO Module



Chapter 2: CREATING A BASIC EXPRESS PO:

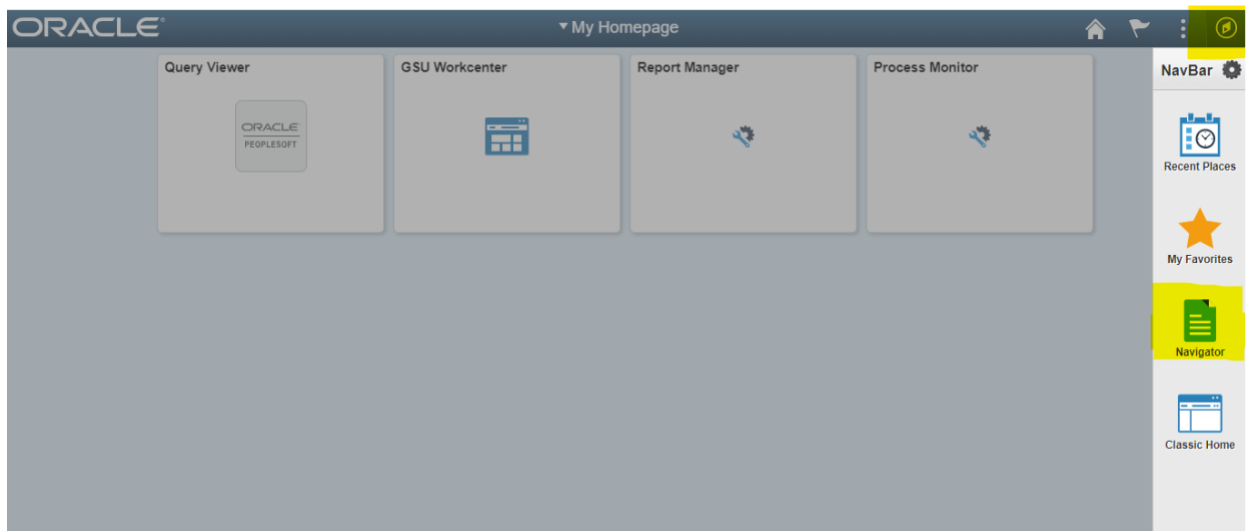
Each step in the online process of entering an Express PO is described below. Compare your screen to the screen shots in the example for each step.

2.1 Creating an Express PO

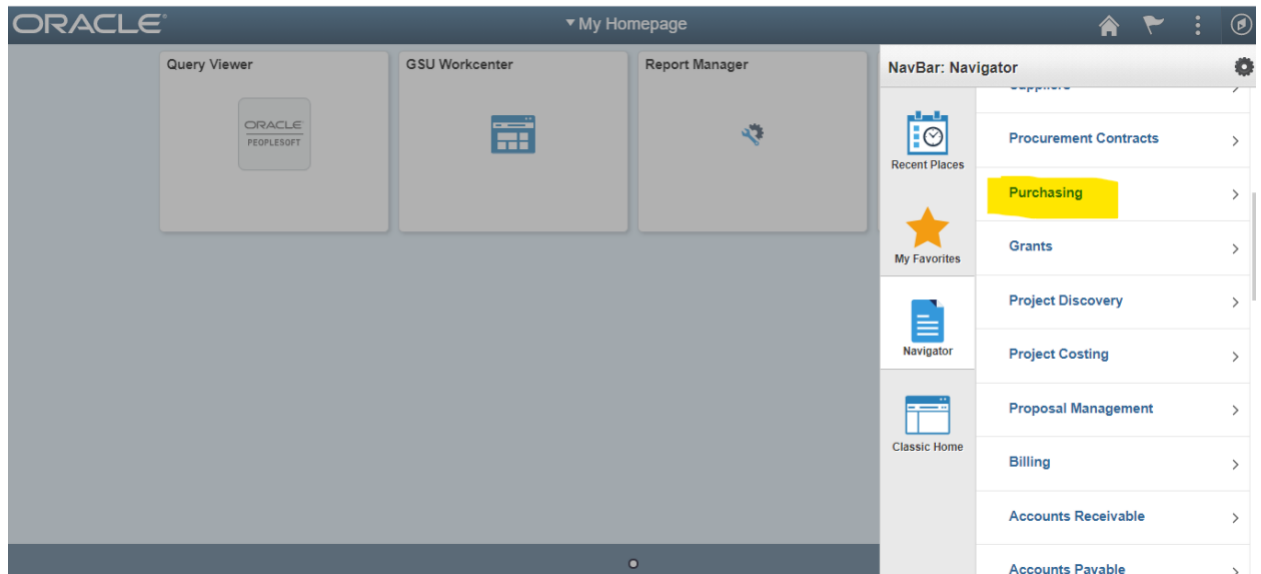
Navigation:

From the Homepage, click on the NavBar in the upper right corner.

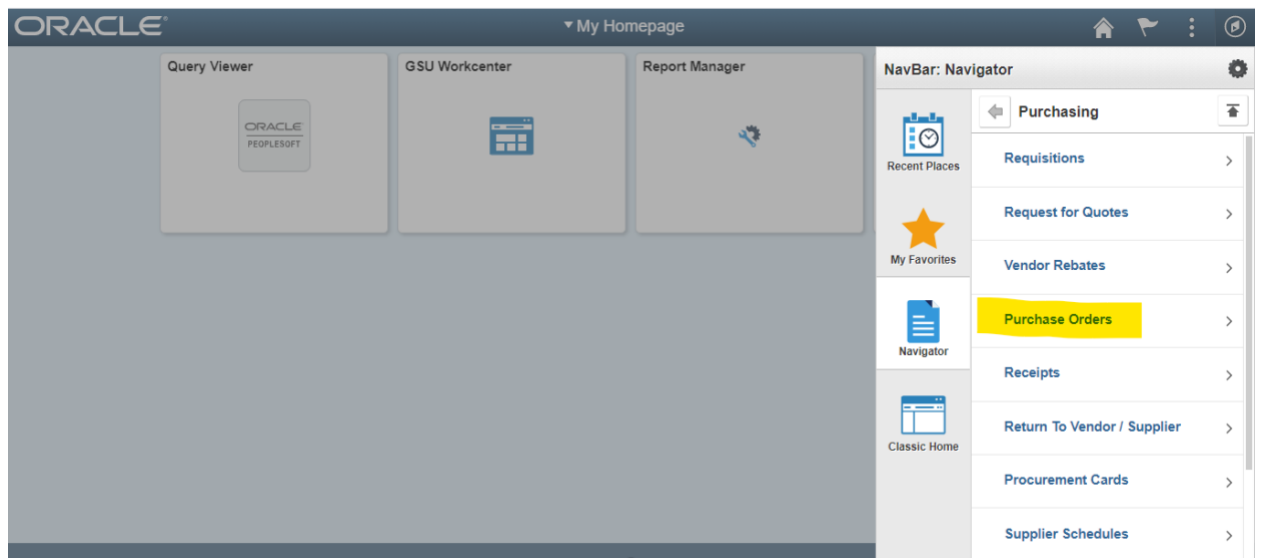
Then click on the Navigator icon.



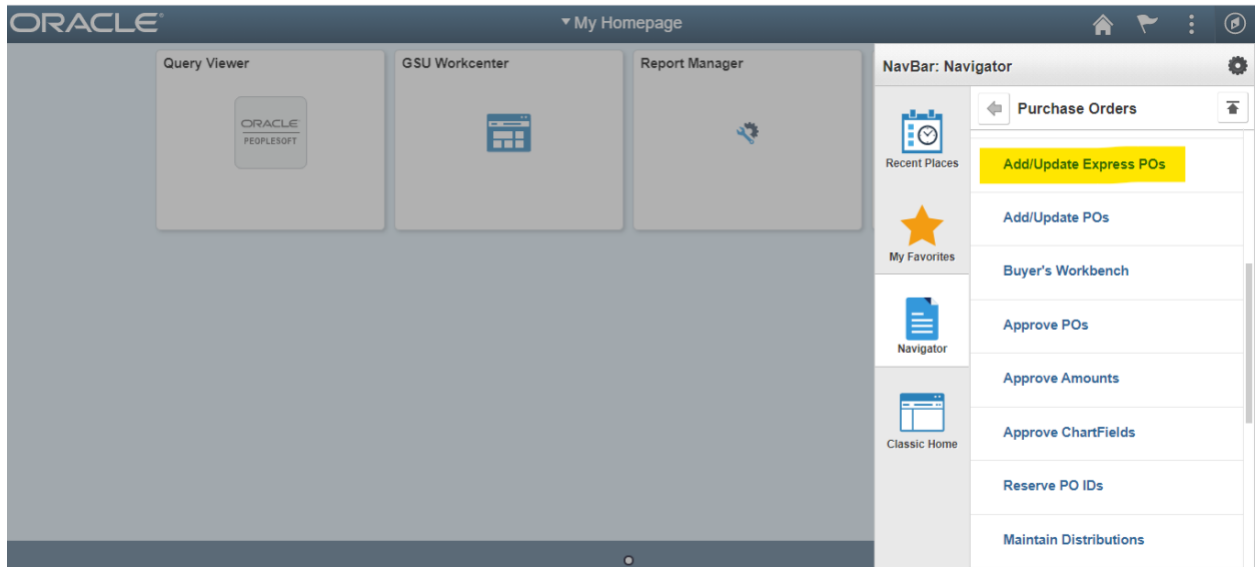
Select Purchasing:



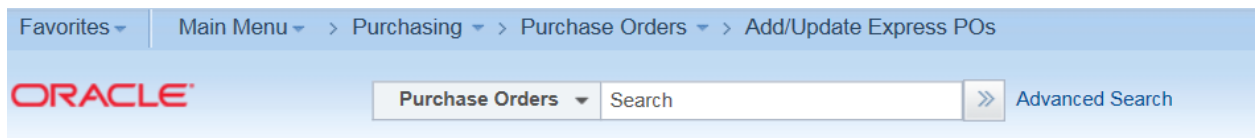
Purchase Orders:



Add/Update Express POs



Purchasing > Purchase Orders > Add/Update Express POs



Express Purchase Order

Business Unit: 
PO ID:
Purchase Order Date: 

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

2.1.1 Add Express PO

Click on the **Add** button.

2.1.2. Choose the Origin

Click on the magnifying glass


Oracle Purchasing > Purchase Orders > Add/Update Express POs

ORACLE Purchase Orders Search Advanced Search

Express Purchase Order

Purchase Order

Business Unit GSUFS PO ID NEXT Copy From

Origin  PO Status Initial Budget Status Not Chk'd ☐ Hold From Further Processing

Header ?

*PO Date 09/16/2015 Supplier Search
*Supplier Supplier Details
*Supplier ID
*Buyer
PO Reference

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Actions

Receipt Status Not Recvd
*Dispatch Method Dispatch

Amount Summary ?

| | |
|-------------------|----------|
| Merchandise | 0.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 0.00 USD |

Calculate

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|--------|
| 1 | | | | | | 0.000 | |

Find First 1 of 1 Last

The options you should choose are **DRG (Department Regular)** or **PRJ (Project)**. The rest of the options are reserved for Central Admin areas. These options drive the workflow approval of your Express Voucher. Click on **DRG** or **PRJ**.

Look Up Origin

Help

SetID: GSUFS

Origin: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-6 of 6 Last

| Origin | Description |
|--------|-------------------------|
| CON | Concur/Airplus Vouchers |
| DRG | Department Regular Rule |
| FA | Student Financial Aid |
| ONL | On Line |
| PRJ | Project Regular |
| SCI | SciQuest/PantherMart |

2.1.3. Enter Department ID

After choosing the origin, the system returns you to the main page. Under the Origin box, you will see there is now a box for the Department. Here, you will enter your 9-digit DRG Department Number or 10-digit PRJ Department Number for workflow approval.

Express Purchase Order

Purchase Order

Business Unit: GSUFS
PO ID: NEXT
Copy From:

Origin: DRG
Department:

PO Status: Initial
Budget Status: Not Chk'd
☐ Hold From Further Processing

Header

*PO Date: 09/16/2015
*Supplier:
*Supplier ID:
*Buyer:
PO Reference:

Supplier Search
Supplier Details

Receipt Status: Not Recvd
*Dispatch Method:
Dispatch

Amount Summary

| | |
|-------------------|----------|
| Merchandise | 0.00 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 0.00 USD |

Calculate

Add Items From

Catalog
Purchasing Kit

Item Search

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|--------|
| 1 | | | | | | 0.000 | Open |

You may also use the magnifying glass to search for your Department number.

ORACLE

Menu
Search: [»](#)

- Accounts Payable
- GSU
- Purchasing
 - Procurement Contracts
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
- Travel and Expenses
- Accounts Receivable
- BOR Menus
- Commitment Control
- General Ledger
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools

Look Up Department

Department:

[Basic Lookup](#)

Search Results

View All First 1 of 1 Last

| Department | Description |
|------------|-------------|
| 110600000 | Biology |

When you choose the Department number from the Search list, you will be redirected to the main page.

ORACLE

Menu
Search: [»](#)

- My Favorites
- Accounts Payable
- GSU
- Purchasing
 - Purchase Orders
 - Manage Change Orders
 - Review PO Information
 - Add/Update Express POs
 - Budget Check
- Commitment Control
- General Ledger
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations
- My System Profile

[Home](#)
[Worklist](#)
[Add to Favorites](#)
[Sign out](#)

[New Window](#)
[Help](#)
[Customize Page](#)
[help](#)

Express Purchase Order

Purchase Order

Unit: GSUFS
PO ID: NEXT
Origin: DRG
Department: 110600000
PO Status: Initial
Budget Status: Not Chk'd

Copy From:

☐ Hold From Further Processing

*PO Date: 05/11/2009 [Vendor Search](#)
Vendor: [Vendor Details](#)
*Vendor ID:
*Buyer:
PO Reference:

Receipt Status: Not Recvd
*Dispatch Method:

Amount Summary

| | |
|--------------------|----------|
| Merchandise: | 0.00 |
| Freight/Tax/Misc.: | 0.00 |
| Total Amount: | 0.00 USD |

[Header Details](#)
[PO Activities](#)
[Add ShipTo Comments](#)
[PO Defaults](#)
[Add Comments](#)
Add Items From
[Purchasing Kit](#)
[Catalog](#)

Lines

| Line | Description | PO Qty | *UOM | Category | Amount |
|------|----------------------|----------------------|----------------------|----------------------|----------------------|
| 1 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Chapter 3: Header Area

3.1 Selecting a Supplier

In Spectrum 9.2, the Supplier field is required and must be completed or you will receive an error message. There are two ways to search for a Supplier; by using Supplier Search or searching for the Supplier ID.

▼ Header ?

*PO Date09/16/2015

Supplier Search

*Supplier

Supplier Details

*Supplier ID

*Buyer

PO Reference

Header Details

Activity Summary

PO Defaults

Add Comments

PO Activities

Add ShipTo Comments

▼ Actions

3.1.1. Supplier Search

Click the Supplier Search link.

The screenshot shows the 'Supplier Search' window. The 'Search Criteria' section contains several input fields: Name, Short Name, Alternate Supp Name, City, State, Country, Postal, Class, Type, and Max Rows (set to 10). A 'Search' button is located below these fields. The 'Search Results' section shows a table with one empty row. The table has columns: Sel, Supplier ID, Address, Short Supplier Name, Supplier Name, and Withholding Applicable. At the bottom, there are tabs for 'Supplier Detail' and 'Address', and buttons for 'OK', 'Cancel', and 'Refresh'.

In the ShortName field, type the first few letters of the supplier name and click the Search button.

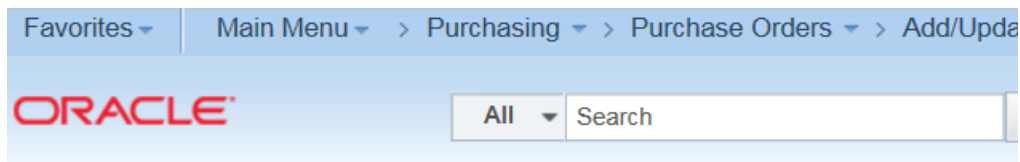
The screenshot shows the 'Supplier Search' window after a search. The 'Short Name' field is highlighted with a red box and contains the text 'DELLMARK'. The 'Search' button is now disabled. The 'Search Results' section shows a table with three rows of results. The table has columns: Sel, Supplier ID, Address, Short Supplier Name, Supplier Name, and Withholding Applicable. The results are for Dell Marketing Corporation with Supplier ID 742616805 and Withholding Applicable 'Y'.

| Sel | Supplier ID | Address | Short Supplier Name | Supplier Name | Withholding Applicable |
|--------------------------|-------------|---------|---------------------|----------------------------|------------------------|
| <input type="checkbox"/> | 742616805 | 1 | DELLMARKET-001 | Dell Marketing Corporation | Y |
| <input type="checkbox"/> | 742616805 | 11 | DELLMARKET-001 | Dell Marketing Corporation | Y |
| <input type="checkbox"/> | 742616805 | 16 | DELLMARKET-001 | Dell Marketing Corporation | Y |

Look for Dell Marketing Corporation in the list.

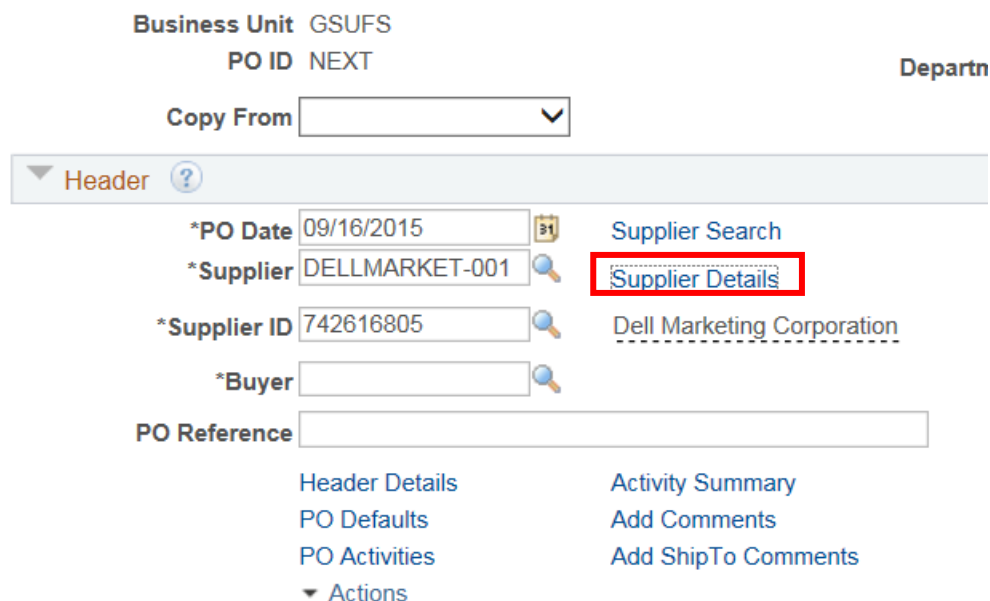
Notice there are three listings for Dell Marketing. These listings represent different addresses that are available in the supplier database for Dell Marketing.

To determine which address you want, you can click the Supplier Detail link to view the supplier address. Click Cancel.







Express Purchase Order

Purchase Order



Business Unit GSUFS
PO ID NEXT
Copy From

▼ Header ?

*PO Date 09/16/2015  Supplier Search
*Supplier DELLMARKET-001  **Supplier Details**
*Supplier ID 742616805  Dell Marketing Corporation
*Buyer 

PO Reference

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
▼ Actions

The system returns you to the main page. The most common way to select a vendor is to click on the magnifying glass next to the Vendor ID field to view the complete list of vendors.

Express Purchase Order

Purchase Order

Business Unit

GSUFS

Origin

Bud

PO ID

NEXT

Copy From

▾

Header ?

*PO Date

09/16/2015

📅

Supplier Search

*Supplier

🔍

Supplier Details

*Supplier ID

🔍

*Buyer

🔍

PO Reference

Amount Summary ?

Header Details

Activity Summary

PO Defaults

Add Comments

PO Activities

Add ShipTo Comments

▾ Actions

Add Items From ?

Catalog

Item Search

Purchasing Kit

Rec

*Dispa

M

Freigh

To

Please note 'GSU Default Vendor' is an option. However, we recommend that you select a preferred vendor on the Express PO.

Look Up Supplier ID

SetID: GSUFS

Supplier ID:

begins with

Short Supplier Name:

begins with

Look Up

Clear

Cancel

Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100

First 1-300 of 300 Last

| Supplier ID | Short Supplier Name | Supplier Name | Additional Name | Our Customer Number | Old Supplier ID |
|-------------|---------------------|--|-------------------|---------------------|-----------------|
| 0000000001 | GSUDEFAULT-001 | GSU DEFAULT - SELECT NEW VENDOR | (blank) | (blank) | (blank) |
| 0000000012 | CHILDSUPPO-001 | CHILD SUPPORT ENFORCEMENT | (blank) | (blank) | (blank) |
| 0000000014 | ALIMONYSUP-001 | Alimony & Support Unit | (blank) | (blank) | (blank) |
| 0000000018 | FAMILYSUPP-001 | Family Support Registry (FSR) | (blank) | (blank) | (blank) |
| 0000000024 | WISCONSIN-001 | Wisconsin Support Collections Trust Fund | (blank) | (blank) | (blank) |
| 0000000025 | LIVINGSTON-003 | Livingston County SCU | (blank) | (blank) | (blank) |
| 0000000028 | STATECOURT-002 | State Court of Fulton County | 100 Justice Tower | (blank) | (blank) |
| 0000000038 | MARYIDATO-001 | MARY IDA TOWNSON, CHAPTER 13 TRUSTEE | (blank) | (blank) | (blank) |
| 0000000039 | CHAPTER13T-002 | Chapter 13 Trustee | (blank) | (blank) | (blank) |
| 0000000046 | ISESCORPOR-001 | ISES CORPORATION | (blank) | (blank) | (blank) |
| 0000000093 | VARIOUSVEN-001 | VARIOUS VENDORS | (blank) | (blank) | (blank) |
| 0000000122 | HUNTINGTON-001 | Huntington Data Systems | (blank) | (blank) | (blank) |
| 0000000149 | DUTCHESS-001 | Dutchess County SCU | (blank) | (blank) | (blank) |
| 0000000222 | MEDCO-002 | MEDCO Company | (blank) | (blank) | (blank) |
| 0000000226 | ALFORDPATR-001 | ALFORD, PATRICIA | (blank) | (blank) | (blank) |
| 0000000262 | GEORGIADEF-001 | GEORGIA DEFINED CONTRIBUTION PLAN | (blank) | (blank) | (blank) |
| 0000000284 | YATES-002 | YATES, JOHN | (blank) | (blank) | (blank) |
| 0000000288 | PIKE-001 | PIKE COUNTY CHILD SUPPORT DIVISION | (blank) | (blank) | (blank) |

In the Short Vendor Name field, type the first few letters of the vendor name and click the Look Up button. Select the desired vendor and the system will return you to the main page.

3.2 Selecting a Buyer

Every Express PO will be assigned to a Buyer in the Purchasing Department. Next to the Buyer field, click the magnifying glass. You will be taken to a list of Buyers. Choose the appropriate Buyer for the commodity or service you would like to purchase. The 'Default GSU Buyer' option is only to be used when the Buyer cannot be readily identified. See <http://tools.finance.gsu.edu/other-resources/account-resources/commodity-to-buyer-cross-reference/> for the Commodity Listing by Buyer. As with the Vendor field, every effort should be made to choose a Buyer.

Caution: Submitting Express POs with Default Vendor AND Default Buyer information may delay PO processing.

Look Up Buyer
✕

Buyer:
begins with ▼

Name:
begins with ▼

Look Up
Clear
Cancel

Basic Lookup

Help

Search Results

View 100

First 1-10 of 10 Last

| Buyer | Name |
|--------------------|-----------------------------|
| ABILLINGS | Billings,Attlee S. |
| GSU_DEFAULT_BUYER | GSU Default Buyer |
| KDOYLE | Doyle,Kaylee Elizabeth |
| KMILTON | Milton,Karmen |
| LALLEN11 | Allen,Logan Randle (term) |
| MDAVIDSON | Davidson,Michael E |
| PANTHER_MART_BUYER | Panther Mart Buyer |
| RODNEYHOLDEN | Holden,Rodney Oneal |
| SJAMES22 | James,Sonya |
| TBLACKBURN | Blackburn,Trennye Tomlinson |

3.3 Entering PO Defaults

The PO Defaults link allows you to enter information that will be defaulted or copied throughout the Express PO. This allows you to add lines to the Express PO without having to re-enter the same information repeatedly.

Click the PO Defaults link.

[Favorites](#) > [Main Menu](#) > [Purchasing](#) > [Purchase Orders](#) > [Add/Update Express POs](#)

ORACLE
 [Advanced Search](#)

Purchase Order

Business Unit **GSUFS** Origin **DRG** PO Status **Open** ☒
 PO ID **NEXT** Department Budget Status **Not Chk'd**
 Copy From ☐ Hold From Further Processing

▼ Header ?

*PO Date **09/16/2015** [Supplier Search](#)
 *Supplier **DELLMARKET-001** [Supplier Details](#)
 *Supplier ID **742616805** [Dell Marketing Corporation](#)
 *Buyer **MDAVIDSON** [Davidson, Michael E](#)
 PO Reference

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

Amount Summary ?

| | | |
|---------------------|-----------------|---------------------------|
| Merchandise | 0.00 | Calculate |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 0.00 USD | |

[Header Details](#) [Activity Summary](#)
[PO Defaults](#) [Add Comments](#)
[PO Activities](#) [Add ShipTo Comments](#)
 ▼ Actions

Add Items From ?

[Catalog](#) [Item Search](#)
[Purchasing Kit](#)

Purchase Order Defaults

Business Unit **GSUFS** PO ID **NEXT** Supplier **DELLMARKET-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 **CENTRAL** [Central Receiving](#) Ultimate Use Code
 Due Date Original Promise Date
 Ship Via **VENDOR** [Freight Terms Code](#) **FOB:DEST**
 Arbitration [Freight Charge Method](#)
 *Distribute By **Quantity** [One Time Address](#)

Distribution

SpeedChart

Distributions

[Personalize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

| Chartfields | Asset Information | | | | | | | | | |
|-------------|----------------------|-----------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------------------|----------------------|----------------------|
| Dist | Percent | GL Unit | Account | Fund | Dept | Program | Class | Bud Ref | PC Bus Unit | Project |
| 1 | <input type="text"/> | GSUFS <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 2016 <input type="text"/> | <input type="text"/> | <input type="text"/> |

[OK](#) [Cancel](#) [Refresh](#)

The **Default Options** area defaults to **Override** to allow you to make changes to the Express PO. This should remain clicked. If you click **Default**, you will not be able to make any changes to the Express PO if an error is made.

The **Line** area of this screen will not be used.

The **Schedule** area of this screen will not be used.

The **Distribution** area of this screen is where you enter the SpeedChart, which will be defaulted throughout the Express PO. Enter your departmental SpeedChart in the SpeedChart field and click on the magnifying glass and select your item from the list (note that if you do not take this extra step your chartfields will be populated in the main P.O. but not in the defaults). You may also search for your SpeedChart by entering a few letters of the SpeedChart and then clicking the magnifying glass.

You will be taken to a list of values from which to choose. Click your selection from the list. Note that you will not see your selection in the SpeedChart field on the Defaults page but the chartfields will be populated throughout your Express P.O.

Look Up SpeedChart

SetID: GSUFS

SpeedChart Key: begins with ▾ SPEC

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-2 of 2 Last

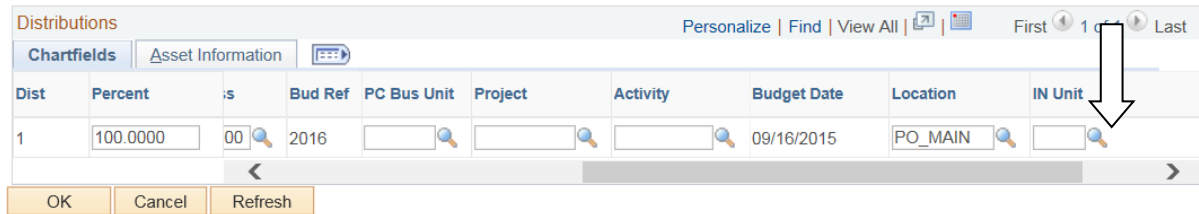
| SpeedChart Key | Description |
|----------------|--------------------------|
| SPEC | Spectrum System -Tuition |
| SPECTEST | Test Speedchart |

You will be brought back to the PO Defaults page and your information will populate the Distribution field. Scroll to the far right of the Purchase Order Defaults page to see the default Location Code. The location field determines where the goods you are requesting should be delivered to when the GSU Warehouse personnel receives them. If the location field is not changed, it

defaults to the GSU Purchasing Office at 1 Park Place. Please change this field so that your goods will be delivered to the appropriate area.

NOTE: Updating the Location Code is required for the purchase of goods, where they will be received by GSU and delivered to a Department. If the Purchase Order is for Travel, Consulting Fees or other services, then changing the Location is not required.

Click on the Location look up icon to change it from the default value, PO_MAIN.



The screenshot shows the 'Distributions' window with the 'Asset Information' tab selected. A table displays distribution details. The 'Location' column shows 'PO_MAIN'. A white arrow points to the magnifying glass icon next to the 'Location' field, indicating where to click to change the value.

| Dist | Percent | s | Bud Ref | PC Bus Unit | Project | Activity | Budget Date | Location | IN Unit |
|------|----------|----|---------|-------------|---------|----------|-------------|----------|---------|
| 1 | 100.0000 | 00 | 2016 | | | | 09/16/2015 | PO_MAIN | |

Buttons at the bottom: OK, Cancel, Refresh.

Look Up Location

SetID: GSUFS

Location Code: begins with

Description: begins with

CITIZENS

Look Up

Clear

Cancel

Basic Lookup

Search Results

View 100 First 1-91 of 91 Last

| Location Code | Description |
|---------------|-------------------------|
| CTB906 | CITIZENS TRUST BUILDING |
| CTB926 | CITIZENS TRUST BUILDING |
| CTB | Citizens Trust Building |
| CTB1000 | Citizens Trust Building |
| CTB1001 | Citizens Trust Building |
| CTB1002 | Citizens Trust Building |
| CTB1003 | Citizens Trust Building |
| CTB1004 | Citizens Trust Building |
| CTB1005 | Citizens Trust Building |
| CTB1006 | Citizens Trust Building |
| CTB1008 | Citizens Trust Building |
| CTB1009 | Citizens Trust Building |
| CTB1011 | Citizens Trust Building |
| CTB1015 | Citizens Trust Building |
| CTB1018 | Citizens Trust Building |
| CTB1025 | Citizens Trust Building |
| CTB1026 | Citizens Trust Building |
| CTB1027 | Citizens Trust Building |
| CTB1028 | Citizens Trust Building |
| CTB1029 | Citizens Trust Building |

You can search for your Location Code either through the Location Code field or the Location Description field. Select the Location where you want the goods delivered to.

Distribution

SpeedChart:

Distributions

Chartfields Asset Information

| Dist | Percent | GL Unit | Account | Fund | Dept | Program | Class | Bud Ref | PC Bus Unit | Project | Activity | Budget Date | Location | IN Unit |
|------|----------|---------|----------------------|-------|-----------|---------|-------|---------|----------------------|----------------------|----------------------|-------------|----------|----------------------|
| 1 | 100.0000 | GSUFS | <input type="text"/> | 10000 | 110600000 | 11100 | 11000 | 2010 | <input type="text"/> | <input type="text"/> | <input type="text"/> | 10/16/2009 | CTB | <input type="text"/> |

Scroll to the bottom of the page and click OK. You will be redirected to the main page of the Express PO.

OK Cancel Refresh

3.4 Other Links under the Header Panel

| | |
|--------------------------------|-------------------------------------|
| Header Details | Activity Summary |
| PO Defaults | Add Comments |
| PO Activities | Add ShipTo Comments |
| ▼ Actions | |

- Header Details** contains template information that should not be changed by the requestor. ***Do not change any information in this link.***
- PO Activities** will not be used by the end user under any circumstances. ***Do not change any information in this link.***
- Add Ship to Comments** can be used by the requestor if there are special delivery instructions.
- Add Comments will** be used when the Travel or Consultant template is copied in an Express PO. This field may also be used by the requestor if there are comments to be relayed to the approver or if there are special comments that should be viewed by the Purchasing Department.

- e. Unlike the Voucher Module, the **Calculate** button under the Header Panel will not be used by the end user under any circumstances. ***Do not click the Calculate button.***
- f. Georgia State has opted not to use the **Purchasing Kit** and **Catalog** links in the implementation of 9.2.


4. Lines Panel

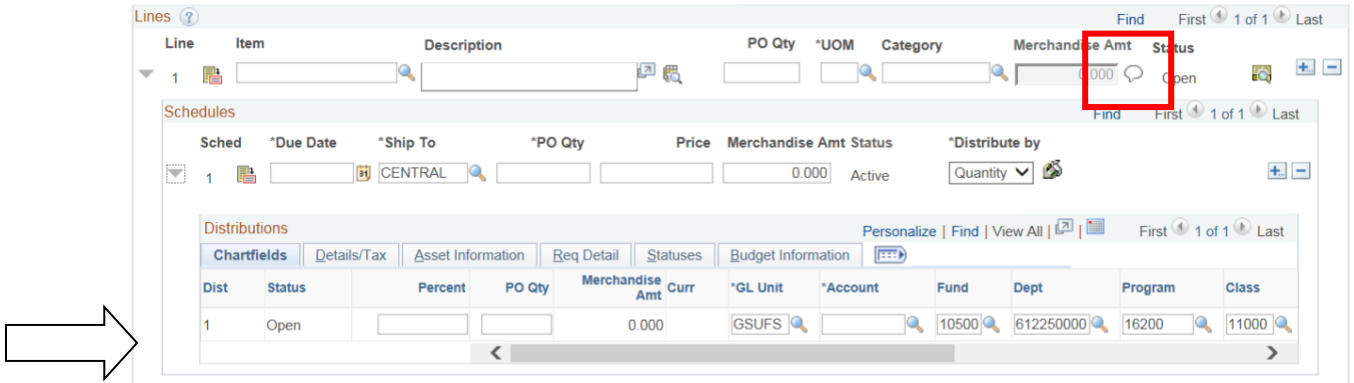
As mentioned previously, the Express PO allows you to enter all of the required information on one page. The Lines area is where the Line Description, Quantity, Unit of Measure (UOM), Category and Price will be entered.

Click the [Expand All](#) link to view three areas: the Lines, Schedules and Distributions areas. The [Collapse All](#) link reduces the view back to Lines view only.

4.1 Lines

4.1.1 Entering Line Description, Quantity, UOM, and Line Comments

Enter a description of the item you are purchasing under **Description** and press Tab. Enter the **Quantity** or how many of the item you wish to purchase and press Tab. Enter the **Unit of Measure (UOM)** and press Tab or use the magnifying glass to search the list of values available. To enter a line comment, click the  icon.



The screenshot shows the 'Lines' window with the following data:

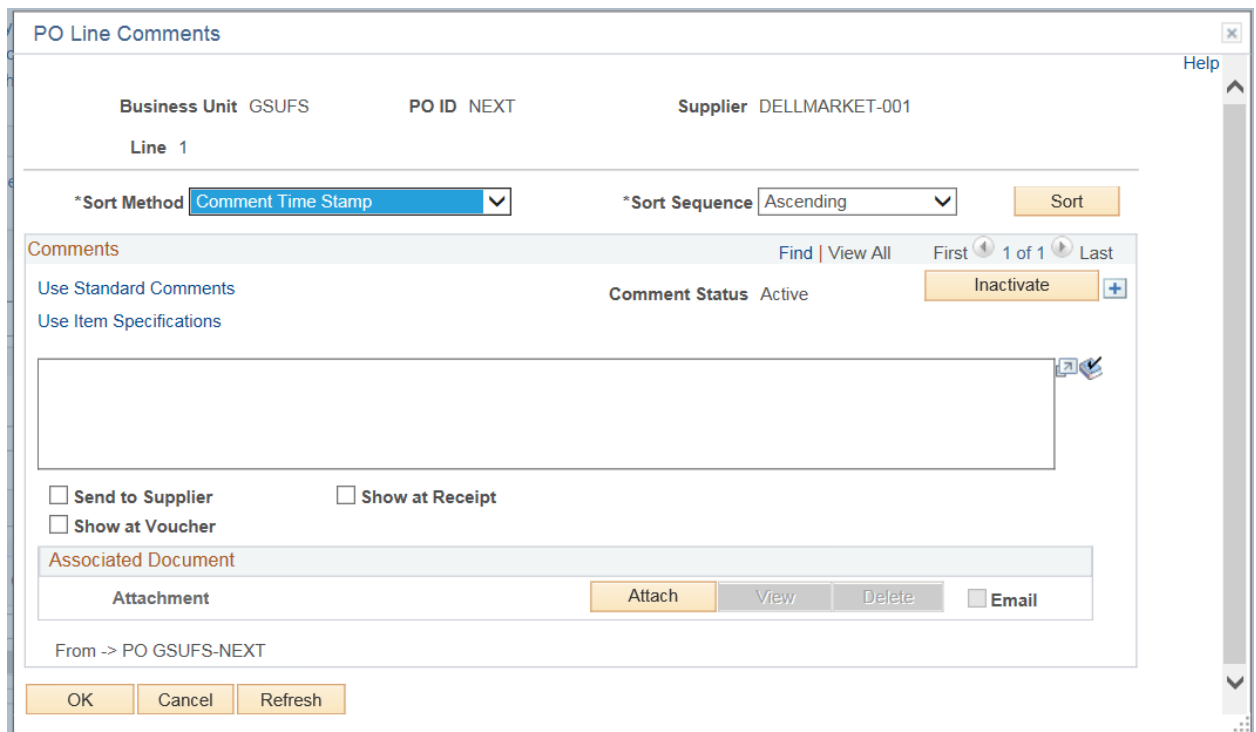
| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|--------|
| 1 | | | | | | 0.000 | Open |

Below the 'Lines' table, the 'Schedules' section shows:

| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amt | Status | *Distribute by |
|-------|-----------|----------|---------|-------|-----------------|--------|----------------|
| 1 | | CENTRAL | | | 0.000 | Active | Quantity |

The 'Distributions' section shows a table with columns: Dist, Status, Percent, PO Qty, Merchandise Amt, Curr, *GL Unit, *Account, Fund, Dept, Program, Class. The first row shows: 1, Open, , , 0.000, GSUFS, , 10500, 612250000, 16200, 11000.

Please note you will not use the [Copy Item Specs](#) link. Also, the Attach button for attachments will not be used. Type your line comments in the Comment field and click OK.



The 'PO Line Comments' window displays the following information:

- Business Unit:** GSUFS
- PO ID:** NEXT
- Supplier:** DELLMARKET-001
- Line:** 1
- *Sort Method:** Comment Time Stamp
- *Sort Sequence:** Ascending
- Comments:** A large text area for entering comments.
- Comment Status:** Active
- Options:**
 - ☐ Send to Supplier
 - ☐ Show at Receipt
 - ☐ Show at Voucher
- Associated Document:**
 - Attachment: Attach, View, Delete
 - Email: ☐ Email
- From:** PO GSUFS-NEXT

4.1.2 Selecting Ship To Location

Click on the **'Ship To'** field to determine where your package is shipped to. The **'Ship To'** field will default to **CENTRAL**. Use the magnifying glass to select a different location only if necessary.

The screenshot displays a software interface with three main sections: 'Lines', 'Schedules', and 'Distributions'. The 'Lines' section at the top has fields for Line, Item, Description, PO Qty, *UOM, Category, Merchandise Amt, and Status. The 'Schedules' section below it has fields for Sched, *Due Date, *Ship To, *PO Qty, Price, Merchandise Amt, Status, and *Distribute by. The 'Distributions' section at the bottom has a table with columns: Dist, Status, Percent, PO Qty, Merchandise Amt, Curr, *GL Unit, *Account, Fund, Dept, Program, and Class. In the 'Schedules' section, the '*Ship To' field is highlighted with a red box and contains the text 'CENTRAL'. The 'Distributions' table has one row with the following values: Dist: 1, Status: Open, Percent: (empty), PO Qty: (empty), Merchandise Amt: 0.000, Curr: (empty), *GL Unit: GSUFS, *Account: (empty), Fund: 10500, Dept: 612250000, Program: 16200, Class: 11000.

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|--------|
| 1 | | | | | | 0.000 | Open |

| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amt | Status | *Distribute by |
|-------|-----------|----------|---------|-------|-----------------|--------|----------------|
| 1 | | CENTRAL | | | 0.000 | Active | Quantity |

| Dist | Status | Percent | PO Qty | Merchandise Amt | Curr | *GL Unit | *Account | Fund | Dept | Program | Class |
|------|--------|---------|--------|-----------------|------|----------|----------|-------|-----------|---------|-------|
| 1 | Open | | | 0.000 | | GSUFS | | 10500 | 612250000 | 16200 | 11000 |

Non-inventory items or special items which have to be installed can be sent directly to a specific location by using the magnifying glass and selecting **'GSU0000'**.

Look Up Ship To Help

SetID: GSUFS

Ship To Location: begins with

Description: begins with

[Basic Lookup](#)

Search Results

View 100 First 1-4 of 4 Last

| Ship To Location | Description |
|------------------|--------------------------------|
| 50DECATUR | Natural Science Loading Dock |
| CENTRAL | Central Receiving |
| GSU0000 | See Below |
| PSC | PARKER H. PETIT SCIENCE CENTER |

Click the **'Add Ship to Comments'** link. In the comments box add the address where the package should be sent. Type ***'Ship Directly to the following address:'*** followed by the address where the package will be sent. Make sure that the **'Send to Vendor'** and the **'Shown at Receipt'** options are checked, and that **GSU0000** is selected in the **'Ship to'** drop-down menu. Press OK.

PO ShipTo Comments

Business Unit GSUFS PO ID NEXT Supplier DELLMARKET-001

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find View All First 1 of 1 Last

Use Standard Comments Ship To GSU0000 Comment Status Active Inactivate +

Ship Directly to the Following Address:
Spectrum Office
Georgia State University
75 Piedmont Avenue NE
Suite B, Basement

☒ Send to Supplier ☒ Show at Receipt
☐ Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> PO GSUFS-NEXT

OK Cancel Refresh

4.1.3 Select a Due Date

Lines ? Find First 1 of 1 Last

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|--------|
| 1 | | | | | | 0.000 | Open |

Schedules Find First 1 of 1 Last

| Sche | Due Date | Ship To | *PO Qty | Price | Merchandise Amt | Status | *Distribute by |
|------|----------|---------|---------|-------|-----------------|--------|----------------|
| 1 | | GSU0000 | | | 0.000 | Active | Quantity |

Distributions Personalize Find View All First 1 of 1 Last

| Chartfields | Details/Tax | Asset Information | Req Detail | Statuses | Budget Information | | | | | | |
|-------------|-------------|-------------------|------------|-----------------|--------------------|----------|----------|-------|-----------|---------|-------|
| Dist | Status | Percent | PO Qty | Merchandise Amt | Curr | *GL Unit | *Account | Fund | Dept | Program | Class |
| 1 | Open | | | 0.000 | | GSUFS | | 10500 | 612250000 | 16200 | 11000 |

Select the calendar icon under the **'Due Date'** field and chose a date. This date will be the the date that you want to *receive* the shipped goods.

4.1.4 Entering the Category and Price

In 9.2, the category code is a national purchasing code called the NIGP code. Click on the magnifying glass.

Look Up Category

SetID: GSUFS

Category: begins with

Description: begins with

Look Up

Clear

Cancel

Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

| Category | Description |
|----------|--------------------------------|
| 00505 | Abrasive Equipment and Tools |
| 00514 | Abrasives, Coated: Cloth, Fibe |
| 00521 | Abrasives, Sandblasting, Metal |
| 00528 | Abrasives, Sandblasting (Other |
| 00542 | Abrasives, Solid: Wheels, Ston |
| 00556 | Abrasives, Tumbling (Wheel) |
| 00563 | Grinding and Polishing Compoun |
| 00570 | Pumice Stone |
| 00575 | Recycled Abrasives Products an |
| 00584 | Steel Wool, Aluminum Wool, and |
| 01005 | Acoustical Tile, All Types (In |
| 01008 | Acoustical Tile Accessories: C |
| 01009 | Acoustical Tile Insulation |
| 01011 | Adhesives and Cements, Acousti |
| 01014 | Adhesives and Cements, Insulat |
| 01017 | Aluminum Foil, etc. |
| 01030 | Bands, Clips, and Wires (For P |
| 01038 | Clips, Pins, etc. (For Duct In |
| 01041 | Cork: Blocks, Boards, Sheets, |

Notice that you have the ability to search for the correct category by the description or account, as well as by category or Alternate Description.

As you may be unfamiliar with the category codes, you may conduct your search by Description. The search offers operands to help you narrow your results. Click the drop down arrow next to Description.

Look Up Category Help

SetID: GSUFS

Category:

Description:

Look Up **Cancel** **Basic Lookup**

Search Results

Only the first 30 results are displayed.

View 100 1-300 of 300 Last

| Category | Description |
|----------|--------------------------------|
| 00505 | Abrasive Equipment and Tools |
| 00514 | Abrasives, Coated: Cloth, Fibe |
| 00521 | Abrasives, Sandblasting, Metal |
| 00528 | Abrasives, Sandblasting (Other |
| 00542 | Abrasives, Solid: Wheels, Ston |
| 00556 | Abrasives, Tumbling (Wheel) |
| 00563 | Grinding and Polishing Compoun |
| 00570 | Pumice Stone |
| 00575 | Recycled Abrasives Products an |
| 00584 | Steel Wool, Aluminum Wool, and |
| 01005 | Acoustical Tile, All Types (In |
| 01008 | Acoustical Tile Accessories: C |
| 01009 | Acoustical Tile Insulation |

To be sure the best choice possible is made, select the operand “contains”. Then enter the item you wish to purchase.

For example, if you want to purchase a computer, type computer in the Description field and click the Look Up button.

Notice there is now a short list of category codes that contains the search word “computer”. Choose the desired category from this list.

Look Up Category

SetID: GSUFS

Category: begins with

Description: contains

COMPUTER

Look Up

Clear

Cancel

Basic Lookup

Help

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last



| Category | Description |
|----------|--------------------------------|
| 00505 | Abrasive Equipment and Tools |
| 00514 | Abrasives, Coated: Cloth, Fibe |
| 00521 | Abrasives, Sandblasting, Metal |
| 00528 | Abrasives, Sandblasting (Other |
| 00542 | Abrasives, Solid: Wheels, Ston |
| 00556 | Abrasives, Tumbling (Wheel) |
| 00563 | Grinding and Polishing Compoun |
| 00570 | Pumice Stone |
| 00575 | Recycled Abrasives Products an |
| 00584 | Steel Wool, Aluminum Wool, and |
| 01005 | Acoustical Tile, All Types (In |
| 01008 | Acoustical Tile Accessories: C |
| 01009 | Acoustical Tile Insulation |
| 01011 | Adhesives and Cements, Acousti |
| 01014 | Adhesives and Cements, Insulat |
| 01017 | Aluminum Foil, etc. |
| 01030 | Bands, Clips, and Wires (For P |
| 01038 | Clips, Pins, etc. (For Duct In |

You are now back at the main page of the Express PO. Go to the Schedules line and enter the price and press Tab.

4.2 Distributions Line

Note that the information has defaulted into the Express PO. This information was brought forward from the PO Defaults page.

4.3 Adding and Deleting Rows

To add or delete a line to the Express PO, you will click the plus or minus sign  at the end of the Lines, Schedules or Distributions lines. When you click the plus sign  a new window, called Explorer User Prompt, will pop-up.

gsu.edu needs some information

Script Prompt
Enter number of rows to add:

OK
Cancel

1

ORACLE

All Search Advanced Search

PO Reference

Header Details
PO Defaults
PO Activities
Actions

Activity Summary
Add Comments
Edit ShipTo Comments

Amount Summary

| | | |
|---------------------|-----------------|-----|
| Merchandise | 4,000.00 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 4,000.00 | USD |

Calculate

Add Items From

Catalog
Purchasing Kit

Item Search

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|--------|
| 1 | | computer | 1.0000 | EA | 20732 | 4,000.00 | Open |

Schedules

| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amt | Status | *Distribute by |
|-------|------------|----------|---------|-------------|-----------------|--------|----------------|
| 1 | 10/16/2015 | GSU0000 | 1.0000 | 4,000.00000 | 4,000.00 | Active | Quantity |

Distributions

| Dist | Status | Percent | PO Qty | Merchandise Amt | Curr | *GL Unit | *Account | Fund | Dept | Program | Class |
|------|--------|----------|--------|-----------------|------|----------|----------|-------|-----------|---------|-------|
| 1 | Open | 100.0000 | 1.0000 | 4,000.00 | USD | GSUFS | 744200 | 10500 | 612250000 | 16200 | 11000 |

Note: If your computer has a pop-up blocker, you will have to make sure to turn it off for the 9.2 site.

At this prompt you can enter the number of lines you wish to add to the Express PO. You can add as many as 100 lines at one time.

gsu.edu needs some information

Script Prompt
Enter number of rows to add:

OK
Cancel

1

Click OK.

Now there is an additional line added to the Express PO:

Lines ? Find First 1-2 of 2 Last

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|--------|
| 1 | | computer | 1.0000 | EA | 20732 | 4,000.00 | Open |

Schedules Find First 1 of 1 Last


| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amt | Status | *Distribute by |
|-------|------------|----------|---------|-------------|-----------------|--------|----------------|
| 1 | 10/16/2015 | GSU0000 | 1.0000 | 4,000.00000 | 4,000.00 | Active | Quantity |

Distributions Personalize Find View All First 1 of 1 Last

| Chartfields | Details/Tax | Asset Information | Req Detail | Statuses | Budget Information | | | | | | |
|-------------|-------------|-------------------|------------|-----------------|--------------------|----------|----------|-------|-----------|---------|-------|
| Dist | Status | Percent | PO Qty | Merchandise Amt | Curr | *GL Unit | *Account | Fund | Dept | Program | Class |
| 1 | Open | 100.0000 | 1.0000 | 4,000.00 | USD | GSUFS | 744200 | 10500 | 612250000 | 16200 | 11000 |

2

When you click the Expand All link, you will find the Schedules and Distribution lines are added, as well. Also, note that the SpeedChart entered in PO Defaults has defaulted into the new line.

If you wanted to charge more than one SpeedChart or account, click the plus sign  at the end of Distributions line and update the information.

Click the horizontal scroll bar to view all of the information on that line.

Line Item Description PO Qty *UOM Category Merchandise Amt Status

1 computer 1.0000 EA 20732 4,000.00 Open

Schedules Find First 1 of 1 Last

1 10/16/2015 GSU0000 1.0000 4,000.00000 4,000.00 Active Quantity

Distributions Personalize Find View All First 1 of 1 Last

Chartfields Details/Tax Asset Information Req Detail Statuses Budget Information

| Dist | Status | Percent | PO Qty | Merchandise Amt | Curr | *GL Unit | *Account | Fund | Dept | Program | Class |
|------|--------|----------|--------|-----------------|------|----------|----------|-------|-----------|---------|-------|
| 1 | Open | 100.0000 | 1.0000 | 4,000.00 | USD | GSUFS | 744200 | 10500 | 612250000 | 16200 | 11000 |

2

Line Item Description PO Qty *UOM Category Merchandise Amt Status

2 0.0000 Open


Schedules Find First 1 of 1 Last

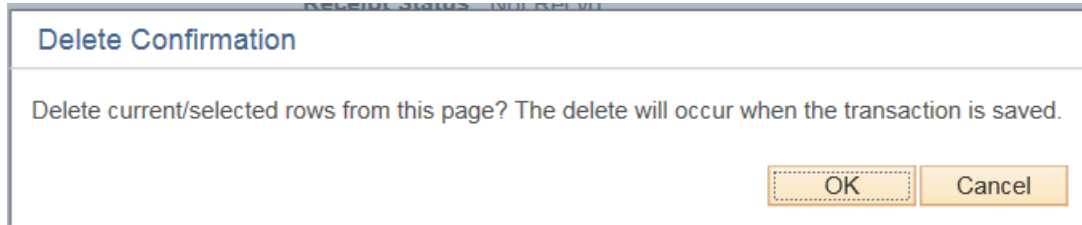
1 GSU0000 0.0000 Active Quantity

Distributions Personalize Find View All First 1 of 1 Last

Chartfields Details/Tax Asset Information Req Detail Statuses Budget Information

| Dist | Status | Percent | PO Qty | Merchandise Amt | Curr | *GL Unit | *Account | Fund | Dept | Program | Class |
|------|--------|---------|--------|-----------------|------|----------|----------|-------|-----------|---------|-------|
| 1 | Open | | | 0.000 | | GSUFS | | 10500 | 612250000 | 16200 | 11000 |

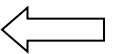
To delete a line, click the Collapse all link, then click the minus sign  at the end of Line 2. You will receive a warning message making sure you want to delete the line. Click OK.



A dialog box titled "Delete Confirmation" with a light blue header. The main text area is white and contains the message: "Delete current/selected rows from this page? The delete will occur when the transaction is saved." At the bottom right, there are two buttons: "OK" and "Cancel", both with orange backgrounds and black text. The "OK" button has a dashed border.

5. Edit/Save Express PO

If multiple distribution lines are not required, click the Save button. The Save button also edits the Express PO in one step. It assigns the PO ID and checks the Express PO for missing information.



6. Budget Checking the Express PO

Scroll to the top of the page. After you have saved the Express PO, notice that PO ID has been assigned.

The screenshot shows the Oracle Purchase Order form. At the top, the PO ID 0000070742 is highlighted with a red box. To the right, the PO Status is 'Open' and the Budget Status is 'Not Chk'd', with a Budget Check icon (a green checkmark in a box) also highlighted with a red box. Below the header, the PO Date is 09/16/2015, the Supplier is DELLMARKET-001, and the Buyer is MDAVIDSON. The Amount Summary section shows a Total Amount of 4,000.00 USD. The Lines section shows a single line item for a computer with a quantity of 1.0000 and a merchandise amount of 4,000.00.

ORACLE

All Search Advanced Search

Purchase Order

Business Unit: 0000070742 PO ID: 0000070742

Origin: DRG PO Status: Open Budget Status: Not Chk'd

Department: 612250000

Copy From: [Dropdown] Hold From Further Processing: [Checkbox]

Header

*PO Date: 09/16/2015 Supplier Search

*Supplier: DELLMARKET-001 Supplier Details

*Supplier ID: 742616805 Dell Marketing Corporation

*Buyer: MDAVIDSON Davidson, Michael E

PO Reference: [Text Box]

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Edit ShipTo Comments

Actions

Receipt Status: Not Recvd

*Dispatch Method: Print Dispatch

Amount Summary

Merchandise: 4,000.00

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 4,000.00 USD

Add Items From

Catalog Item Search

Purchasing Kit

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------|--------|------|----------|-----------------|--------|
| 1 | | computer | 1.0000 | EA | 20732 | 4,000.00 | Open |

Click the Budget Check icon  .

The Express PO should have a PO Status of Open and a Budget Status of Valid.



[Favorites](#) > [Main Menu](#) > [Purchasing](#) > [Purchase Orders](#) > [Add/Update Express POs](#)


ORACLE
[Purchase Orders](#)

[Advanced Search](#)

Express Purchase Order





Purchase Order

Business Unit **GSUFS**
 Origin **DRG**
 PO Status **Open**  

PO ID **0000070742**
 Department **612250000**
 Budget Status **Valid** 


Copy From
☐ Hold From Further Processing

▼ Header ?

*PO Date **09/16/2015**  [Supplier Search](#)
 *Supplier **DELLMARKET-001**  [Supplier Details](#)
 *Supplier ID **742616805**  [Dell Marketing Corporation](#)
 *Buyer **MDAVIDSON**  [Davidson, Michael E](#)

PO Reference

[Header Details](#)
[Activity Summary](#)
[PO Defaults](#)
[Add Comments](#)
[PO Activities](#)
[Edit ShipTo Comments](#)
[Requisitions](#)
[Document Status](#)
 ▼ Actions

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

Amount Summary ?

| | | |
|----------------------------|-----------------|------------|
| Merchandise | 4,000.00 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 4,000.00 | USD |
| Encumbrance Balance | 4,000.00 | USD |

[Calculate](#)


Add Items From ?

[Catalog](#)
[Item Search](#)

Select Lines To Display ?

Search for Lines
 Line To [Retrieve](#)

6.1 Submitting the PO into Workflow

The final step is to submit your PO into Workflow. This can be done by clicking on the Green checkmark 

7. Workflow Approval

GSU workflow routings are based on the Origin and Department/Project that users select on the document header. The Origin and Department/Project selected on the transaction header will determine the workflow approval routing for the transaction. Users that are approvers will be assigned to an Approval Role (i.e – Approver 1 or Approver 2). In addition, users will be assigned to individual Departments and Project Id's. These assignments are maintained by the Workflow Administrator.

GSU uses the following levels of workflow approval for each of the transactions:

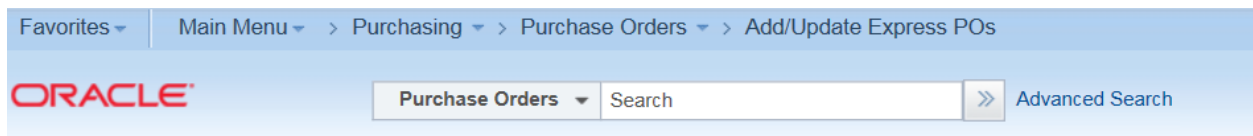
| | |
|-----------------------|-----------------------|
| Purchase Orders - DRG | Purchase Orders - PRJ |
| Department Approver 1 | Project Approver 1 |
| Department Approver 2 | Project Administrator |
| | Project Approver 2 |

8.0 Copying an Express PO from An Existing Express PO


When creating an Express PO for Travel or an Consulting Contract, there is a Express PO template available for you to copy.

8.1 Creating a Travel PO/Consultant PO

Click on the **Add a New Value** tab.



Express Purchase Order



Business Unit: 
PO ID:
Purchase Order Date: 



[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

Click on the drop down arrow next to the **Copy From** field and select **Purchase Order**.

Express Purchase Order

Purchase Order

Business Unit GSUFS PO ID NEWT

Origin PO Status Initial Budget Status Not Chk'd

Copy From

▼ Header ?

*PO Date 09/17/2015 Supplier Search

*Supplier Supplier Details

*Supplier ID

*Buyer

PO Reference

Receipt Status Not Recvd

*Dispatch Method

Amount Summary ?

Merchandise 0.00

Freight/Tax/Misc. 0.00

Total Amount 0.00 USD

Add Items From ?

Catalog Item Search

Purchasing Kit

Lines ?

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|----------------------|----------------------|----------------------|----------------------|----------------------|-----------------|--------|
| 1 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | 0.000 | Open |

Expand All Collapse All

View Printable Version View Approvals

Go to ... More ...

Type in the template name (**ETRAVEL**, **STRAVEL**, or **CONSULTANT**) in the PO ID field, click the magnifying glass, click the blue hyperlink, and click on Search. Then click the check box next to the template name and click **OK**.

Copy Purchase Order from Purchase Order

PO Selection Criteria

PO ID ETRAVEL PO Date 31

Supplier Status

Supplier ID Origin

Buyer Item ID

PO Reference Category

Select PO

Personalize | Find | View All | First 1 of 1 Last

Details More Details

| Select | PO ID | PO Date | PO Status | Supplier ID | Supplier |
|--------------------------|---------|------------|------------|-------------|----------------|
| <input type="checkbox"/> | ETRAVEL | 07/01/2013 | Dispatched | 0000000001 | GSUDEFAULT-001 |

The system will redirect you to the main page. There is now information copied into the Express PO.

Express Purchase Order

Purchase Order

Business Unit GSUFS
PO ID NEXT
Copy From

Origin PO Status Open ☒
Department Budget Status Not Chk'd
☐ Hold From Further Processing

Header

*PO Date 09/17/2015 [Supplier Search](#)
*Supplier GSUDEFAULT-001 [Supplier Details](#)
*Supplier ID 0000000001 [GSU DEFAULT - SELECT NEW VENDOR](#)
*Buyer TBLACKBURN [Blackburn, Trennye Tomlinson](#)
Receipt Status Not Recvd
*Dispatch Method Print [Dispatch](#)

PO Reference

Amount Summary

| | | |
|-------------------|------|---------------------------|
| Merchandise | 0.02 | |
| Freight/Tax/Misc. | 0.00 | Calculate |
| Total Amount | 0.02 | USD |

Add Items From

Catalog Item Search
Purchasing Kit

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|----------------------|-------------------------|--------|------|----------|-----------------|--------|
| 1 | <input type="text"/> | Employee Travel Expense | 1.0000 | EA | 96288 | 0.01 | Open |
| 2 | <input type="text"/> | Employee Travel-Mileage | 1.0000 | EA | 96298 | 0.01 | Open |

Expand All Collapse All
View Printable Version View Approvals

Go to

Please note that when the template is copied to a new Express PO, the information must be changed to reflect the new information required for your department. Update the Origin by clicking on the magnifying glass. This will determine the workflow routing for approval. If these expenditures are charged to a project, select PRJ for Origin. In this example, select DRG (expenditures will not be charged to a project) from the Search list.

Look Up Origin

Help

SetID: GSUFS

Origin: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-6 of 6 Last

| Origin | Description |
|--------|-------------------------|
| CON | Concur/Airplus Vouchers |
| DRG | Department Regular Rule |
| FA | Student Financial Aid |
| ONL | On Line |
| PRJ | Project Regular |
| SCI | SciQuest/PantherMart |

You will be redirected to the main page. Update the Department ID by clicking the magnifying glass.

Express Purchase Order

Purchase Order

Business Unit GSUFS

PO ID NEXT

Department

Origin

PO Status Open

Budget Status Not Chk'd

Copy From

Hold From Further Processing

Header

*PO Date 09/17/2015

Supplier Search

*Supplier GSUDEFAULT-001

Supplier Details

*Supplier ID 0000000001

GSU DEFAULT - SELECT NEW VENDOR

*Buyer TBLACKBURN

Blackburn, Trennye Tomlinson

Receipt Status Not Recvd

*Dispatch Method Print

Dispatch

PO Reference

Amount Summary

Header Details

Activity Summary

PO Defaults

Edit Comments

PO Activities

Add ShipTo Comments

Actions

Merchandise 0.02

Freight/Tax/Misc. 0.00

Total Amount 0.02 USD

Calculate

Add Items From

Catalog

Item Search

Purchasing Kit

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------------------|--------|------|----------|-----------------|--------|
| 1 | | Employee Travel Expense | 1.0000 | EA | 96288 | 0.01 | Open |
| 2 | | Employee Travel-Mileage | 1.0000 | EA | 96298 | 0.01 | Open |

Expand All

Collapse All

View Printable Version

View Approvals

Go to More

Enter the first few digits of your department ID and click the Look Up button.
Select your department ID.

Look Up Department [X] [Help](#)

Department: begins with ▼ 612

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

View 100 First ◀ 1-5 of 5 ▶ Last

| Department | Description |
|------------|--------------------------------|
| 612000000 | VP for Finance & Administratio |
| 612200000 | Budget & Planning |
| 612250000 | Spectrum Office |
| 612300000 | Org Dev & Consulting Svcs |
| 612355000 | Mgt & Staff Dev Svcs - DS&S |

When you choose the Department ID from the Search list, you will be redirected to the main page. Change the Vendor ID to the name of the traveler in your department or to the name of the consultant or consulting company. Begin by clicking on the magnifying glass next to the Vendor ID field.

Purchase Order

Business Unit GSUFS
 PO ID NEXT
 Copy From

Origin DRG
 Department 612250000
 PO Status Open
 Budget Status Not Chk'd
☐ Hold From Further Processing

▼ Header ?

*PO Date 09/17/2015
 Supplier Search
 Supplier ID 000000001
 Supplier Details
 GSU DEFAULT - SELECT NEW VENDOR
 Receipt Status Not Recvd
 *Dispatch Method Print
 Dispatch
 Buyer TBLACKBURN
 Blackburn, Trennye Tomlinson
 PO Reference

Header Details
 PO Defaults
 PO Activities
 Actions

Activity Summary
 Edit Comments
 Add ShipTo Comments

Amount Summary ?

Merchandise 0.02
 Freight/Tax/Misc. 0.00
 Total Amount 0.02 USD
 Calculate

Add Items From ?

Catalog
 Purchasing Kit
 Item Search

Lines ?

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------------------|--------|------|----------|-----------------|--------|
| 1 | | Employee Travel Expense | 1.0000 | EA | 96288 | 0.01 | Open |
| 2 | | Employee Travel-Mileage | 1.0000 | EA | 96298 | 0.01 | Open |

Expand All
 View Printable Version
 Collapse All
 View Approvals
 Go to More ...

In the Short Vendor Name field, enter the traveler's last name or if you are issuing a consultant PO, enter the first few letters of the company name and click the Look Up button. Click your selection from the Search list.

Look Up Supplier ID

SetID: GSUFS
 Supplier ID: begins with
 Short Supplier Name: begins with BRENNAMAN

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-3 of 3 Last

| Supplier ID | Short Supplier Name | Supplier Name | Additional Name | Our Customer Number | Old Supplier ID |
|-------------|---------------------|------------------------------|-----------------|---------------------|-----------------|
| 001110984 | BRENNAMAN,-001 | Brennaman,Gary B | (blank) | (blank) | 001110984 |
| 000503405 | BRENNAMAN,-002 | Brennaman,Melissa Bell | (blank) | (blank) | 000503405 |
| 001794190 | BRENNAMAN,-003 | Brennaman,Courtney Elizabeth | (blank) | (blank) | 001794190 |

The Express Purchase Order Main Page is displayed.

Purchase Order

Business Unit GSUFS
PO ID NEXT
Copy From

Origin DRG
Department 612250000
PO Status Open
Budget Status Not Chk'd
☐ Hold From Further Processing

Header

*PO Date 09/17/2015
*Supplier BRENNAMAN,-002
*Supplier ID 000503405
*Buyer TBLACKBURN

Supplier Search
Supplier Details
Brennaman, Melissa Bell
Blackburn, Trennye Tomlinson

PO Reference

Header Details
PO Defaults
PO Activities
Actions

Activity Summary
Edit Comments
Add ShipTo Comments

Receipt Status Not Recvd
*Dispatch Method Print
Dispatch

Amount Summary

| | | |
|-------------------|------|-----|
| Merchandise | 0.02 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 0.02 | USD |

Calculate

Add Items From

Catalog
Purchasing Kit

Item Search

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------------------|--------|------|----------|-----------------|--------|
| 1 | | Employee Travel Expense | 1.0000 | EA | 96288 | 0.01 | Open |
| 2 | | Employee Travel-Mileage | 1.0000 | EA | 96298 | 0.01 | Open |

Expand All
Collapse All
View Printable Version
View Approvals

Go to

Click on the PO Defaults link and update the Speedchart information.

Purchase Order Defaults

Business Unit GSUFS
PO ID NEXT
Supplier BRENNAMAN,-002

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 CENTRAL
Due Date
Ship Via VENDOR
Arbitration
*Distribute By Amount

Central Receiving
Ultimate Use Code
Original Promise Date
Freight Terms Code FOB:DEST
Freight Charge Method

One Time Address

Distribution

SpeedChart SPECT

Distributions

Personalize | Find | View All | First 1 of 1 Last

| Dist | Percent | GL Unit | Account | Fund | Dept | Program | Class | Bud Ref | PC Bus Unit | Project |
|------|----------|---------|---------|-------|-----------|---------|-------|---------|-------------|---------|
| 1 | 100.0000 | GSUFS | | 10000 | 612250000 | 11100 | 11000 | 2012 | | |

OK Cancel Refresh

The system returns you to the PO Defaults page and your information will populate the Distribution field. Scroll to the bottom of the page and click OK.

Any changes that you make on the PO Defaults page will cause the “Retrofit field changes” page to appear. Click on the **Select All** link. You must click this Select All link to change the default chartfield values on the template to your speedchart values. Notice when you click on this link, all of the boxes in the ‘Apply’ column will be checked. Click OK.

PO Default Retrofit

Express Purchase Order

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

Business Unit GSUFS PO ID NEXT Supplier BRENNAMAN,-002

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.

Retrofit Field Selection Personalize Find View All First 1-7 of 8 Last

| Apply | Distrib Line | Field Name | Field Value | Apply to All Distribs |
|-------------------------------------|--------------|--------------------|-------------|--------------------------|
| <input checked="" type="checkbox"/> | | Ship To | CENTRAL | |
| <input checked="" type="checkbox"/> | | Ship Via | VENDOR | |
| <input checked="" type="checkbox"/> | | Freight Terms Code | FOB:DEST | |
| <input checked="" type="checkbox"/> | 1 | Fund | 10500 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 1 | Dept | 620020000 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 1 | Program | 16200 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 1 | Bud Ref | 2016 | <input type="checkbox"/> |

☒ Select All ☐ Clear All

OK Cancel Refresh

The system will return you to the main page of the Express PO. To access the template comments for the Travel PO and the Consultant PO, click the Edit Comments link.

Purchase Order

| | | | | | | |
|---------------|----------------------|---|-----------|---------------|-----------|-------------------------------------|
| Business Unit | GSUFS | Origin | DRG | PO Status | Open | <input checked="" type="checkbox"/> |
| PO ID | NEXT | Department | 612250000 | Budget Status | Not Chk'd | |
| Copy From | <input type="text"/> | <input type="checkbox"/> Hold From Further Processing | | | | |

Header ?

*PO Date: 09/17/2015

*Supplier: BRENNAMAN,-002

*Supplier ID: 000503405

*Buyer: TBLACKBURN

PO Reference:

Header Details
PO Defaults
PO Activities
▼ Actions

Supplier Search

Supplier Details

Brennaman, Melissa Bell

Blackburn, Trennye Tomlinson

Activity Summary

Edit Comments

Add Ship to Comments

Receipt Status: Not Recvd

*Dispatch Method: Print

Amount Summary ?

| | | |
|---------------------|----------|--|
| Merchandise | 0.02 | |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 0.02 USD | |

Add Items From ?

Catalog Item Search

Purchasing Kit

Lines ?

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------------------|--------|------|----------|-----------------|--------|
| 1 | | Employee Travel Expense | 1.0000 | EA | 96288 | 0.01 | Open |

Schedules

| Sched | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amt | Status | *Distribute by |
|-------|------------|----------|---------|---------|-----------------|--------|----------------|
| 1 | 10/17/2015 | CENTRAL | 1.0000 | 0.01000 | 0.01 | Active | Amount |

Distributions

Personalize | Find | View All | First 1 of 1 Last

For the **Travel Template** enter the Traveler's Name, Travel To information, Dates, Purpose of Travel, and who will handle Classes/Duties in the traveler's absence. On the **Consultant Template**, you will enter the SS# or FEI #, the address, and attach a copy of the Statement of Work or Payment Schedule. For each template, always check the **Shown at Voucher** box so the comments in this section are available for Disbursements to view. Click **OK**.

PO Header Comments

Business Unit GSUFSPO ID NEXTSupplier BRENNAMAN,-002

*Sort MethodComment Time Stamp

*Sort SequenceAscending

Sort

Comments

Find | View AllFirst 1 of 1 Last

Use Standard Comments

Comment Status Active

Inactivate

Use Scroll Bar to View ALL COMMENTS:
Traveler's Name: Melissa Bell Brennaman
Travel To: Orlando, FL
Dates: 10/1/2015 - 10/2/2016
Purposes: Conference

☐ Send to Supplier

☐ Show at Receipt

☒ Show at Voucher

Associated Document

Attachment

Attach

View

Delete

Email

From -> PO GSUFS-ETRAVEL

OK

Cancel

Refresh

You will be redirected to the main page. Click the Expand All link. Under Line #1, on the Schedules line, go to the Price box and enter the amount you wish to encumber for the trip. If there is mileage involved with this trip, enter the estimated mileage amount in the Price box under Line #2 on the Schedules line.

Express Purchase Order

Purchase Order

Business Unit GSUFS
PO ID NEXT
Copy From

Origin DRG
Department 612250000
PO Status Open
Budget Status Not Chk'd
☐ Hold From Further Processing

Header

*PO Date 09/17/2015
*Supplier BRENNAMAN,-002
*Supplier ID 000503405
*Buyer TBLACKBURN
PO Reference

Supplier Search
Supplier Details
Brenneman, Melissa Bell
Blackburn, Trennye Tomlinson

Receipt Status Not Recvd
*Dispatch Method Print
Dispatch

Amount Summary

| | | |
|-------------------|----------|-----------|
| Merchandise | 0.02 | Calculate |
| Freight/Tax/Misc. | 0.00 | |
| Total Amount | 0.02 USD | |

Add Items From

Catalog
Purchasing Kit

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------|-------------------------|--------|------|----------|-----------------|--------|
| 1 | | Employee Travel Expense | 1.0000 | EA | 96288 | 0.01 | Open |
| 2 | | Employee Travel-Mileage | 1.0000 | EA | 96298 | 0.01 | Open |

Expand All
View Print
Collapse All
View Approvals

Go to ... More ...

If the information on the Distributions line is correct, click the **Save** button. Click the **Budget Checking** icon.

Note that you now have a PO ID assigned to your PO. The PO Status is **Pending Approval** and the Budget Status is **Valid**. You have successfully copied an Express PO from the Travel or Consultant PO template. Submit the PO into Workflow using the Green check mark icon.

Your Travel or Consultant PO is ready to be processed. Please follow the appropriate guidelines for Travel and Consultant Services as described by the Office of Disbursements.

The training manual and policies for consultant services and travel can be found on the following websites:

<http://universityattorney.gsu.edu/legal-services/contracts/>

http://tools.finance.gsu.edu/files/gravity_forms/4-8e07dc847fdf28f377a979c5da20e99e/2015/02/Travel-ReportingandPayments.pdf