The Express Purchase Order

User Manual

The Spectrum+ System

Georgia State University

PeopleSoft Financials

Version 9.2

(Revised 11/23/2020)

Table of Contents

1. INTRODUCTION……3

1.1 PURCHASING OVERVIEW……3
1.2 USE OF EXPRESS POs……4
1.3 PRIMARY FUNCTIONS OF THE PO MODULE……5

2. CREATING A BASIC EXPRESS PO ……6

2.1 CREATING AN EXPRESS PO……6
2.1.1 ADD EXPRESS PO……7
2.1.2 CHOOSE ORIGIN……7
2.1.3 ENTER DEPARTMENT ID……9

3. HEADER AREA……10

3.1 SELECTING A SUPPLIER……11
3.1.1 SUPPLIER SEARCH……11
3.2 SELECTING A BUYER……16
3.3 ENTERING PO DEFAULTS……17
3.4 OTHER LINKS UNDER THE HEADER PANEL……21

4. LINES PANEL……22

4.1 LINES……22
4.1.1 ENTERING LINE DESCRIPTION, QUANTITY, UOM AND LINE COMMENTS……22
4.1.2 Selecting Ship To Location……24
4.1.3 Select a Due Date……27
4.1.4 Entering the Category and Price……27

4.2 DISTRIBUTIONS LINE……31

4.3 ADDING AND DELETING ROWS……31

5. EDIT/SAVE EXPRESS PO……34

6. BUDGET CHECKING THE EXPRESS PO……35

7. WORKFLOW APPROVAL……36

8.0 COPYING AN EXPRESS PO FROM ANOTHER EXPRESS PO……37

8.1 CREATING A TRAVEL PO/CONSULTANT PO……37

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 polices, 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.

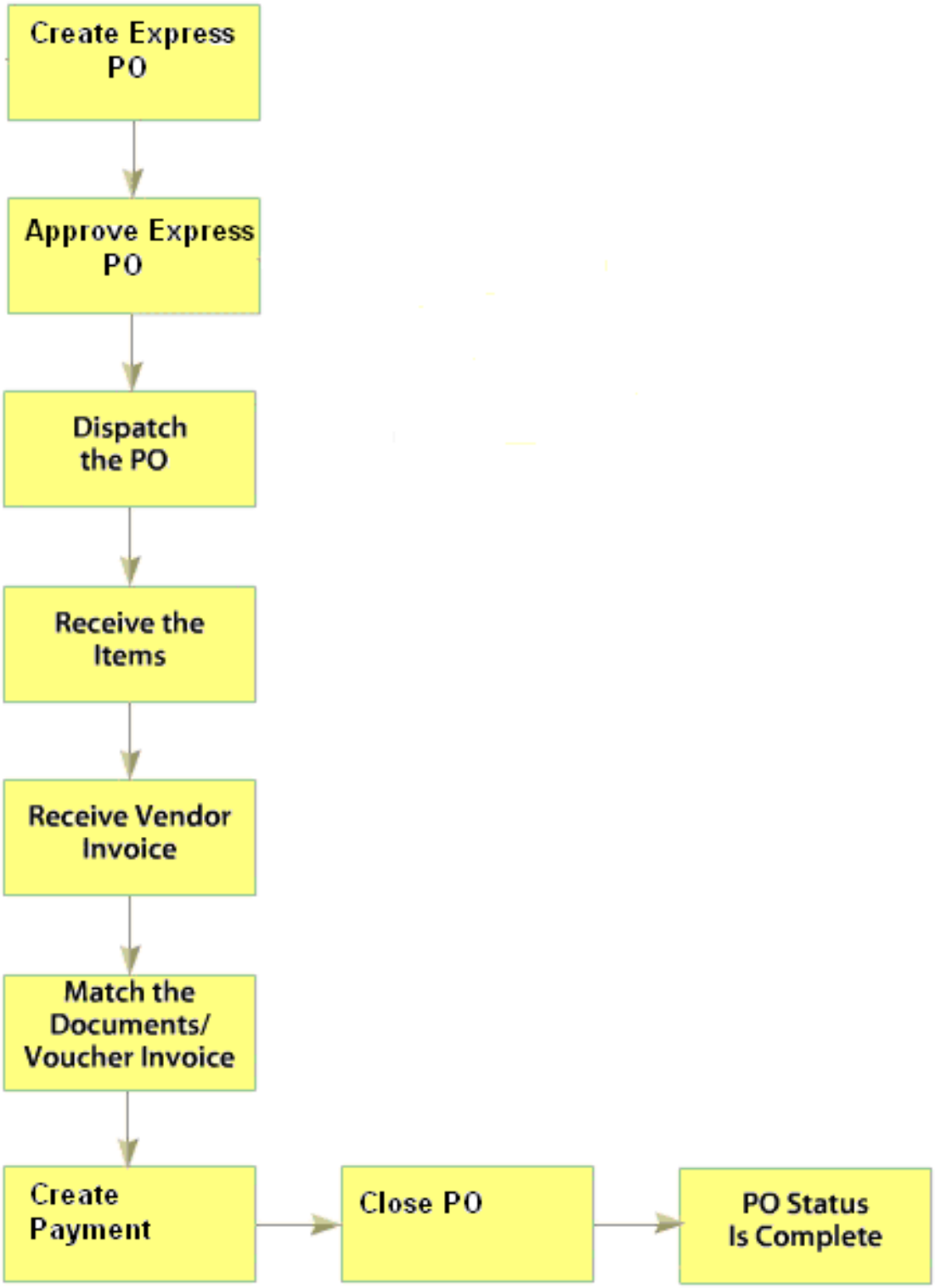
Georgia State has made the decision not to use Requisitions and the eProcurement module.

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 appoval. 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:

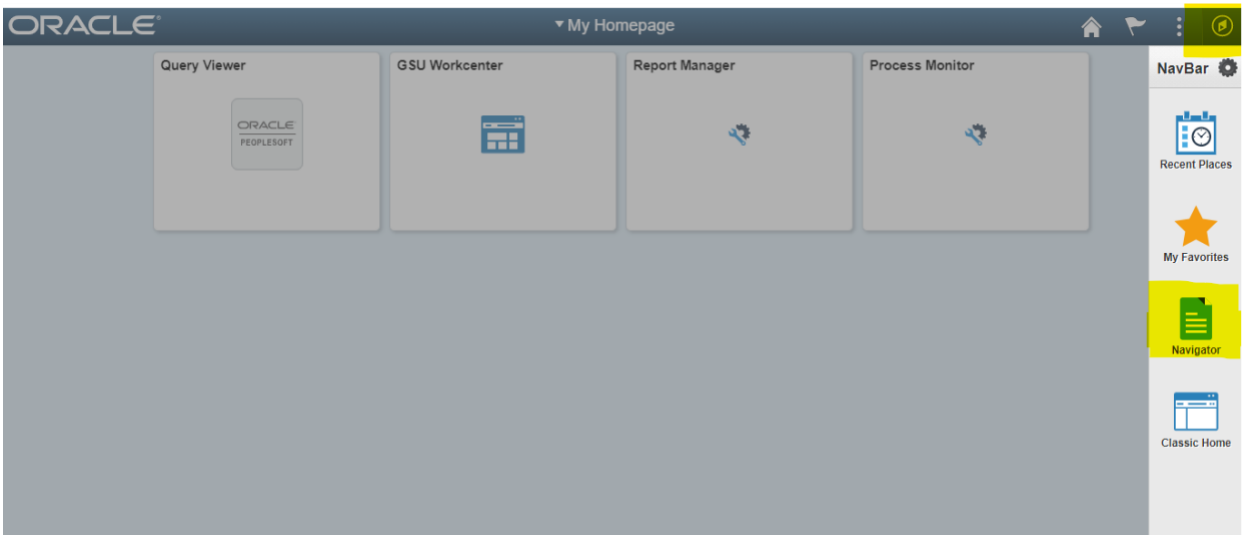
Each step in the online process of entering an Express PO is described below. Compare your screen to the screen shots in the example for each step.

2.1 Creating an Express PO

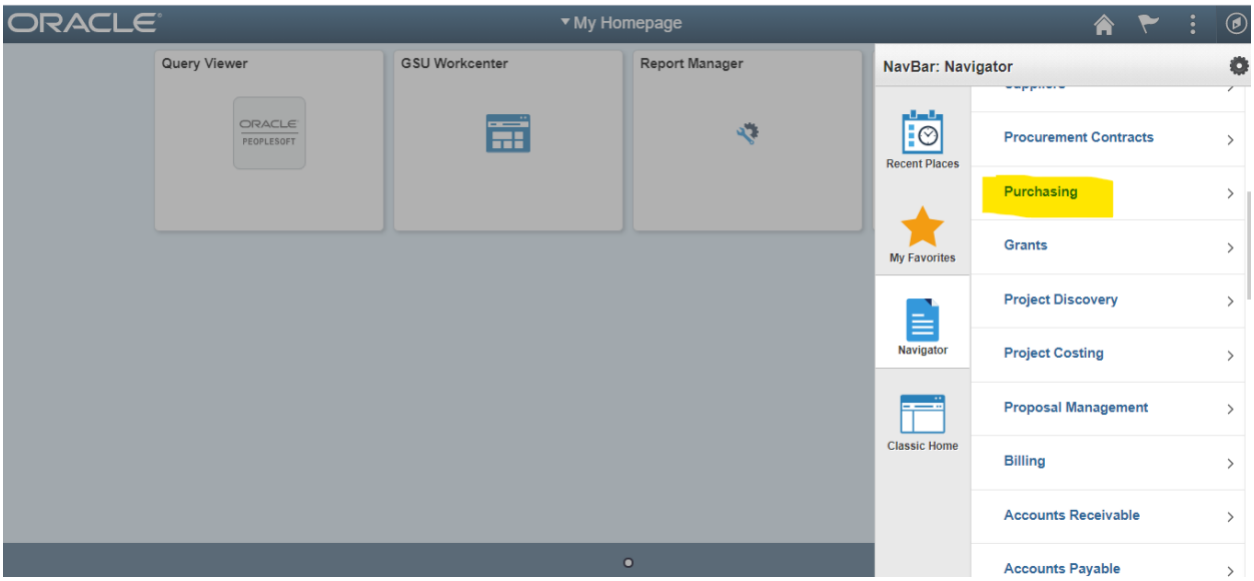
Navigation:

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

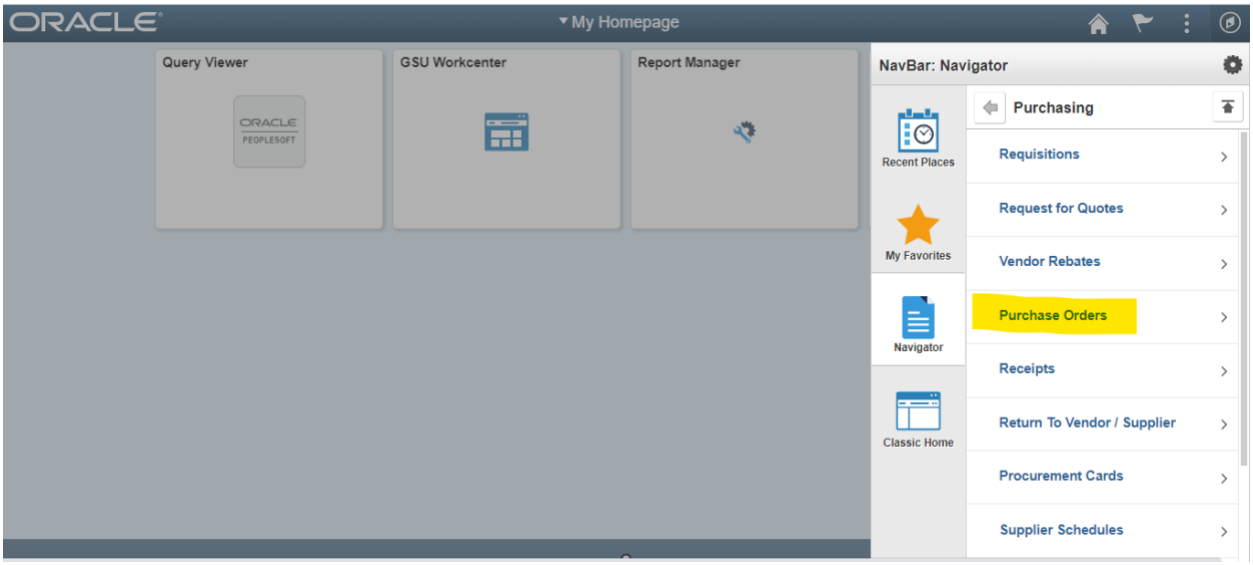
Then click on the Navigator icon.



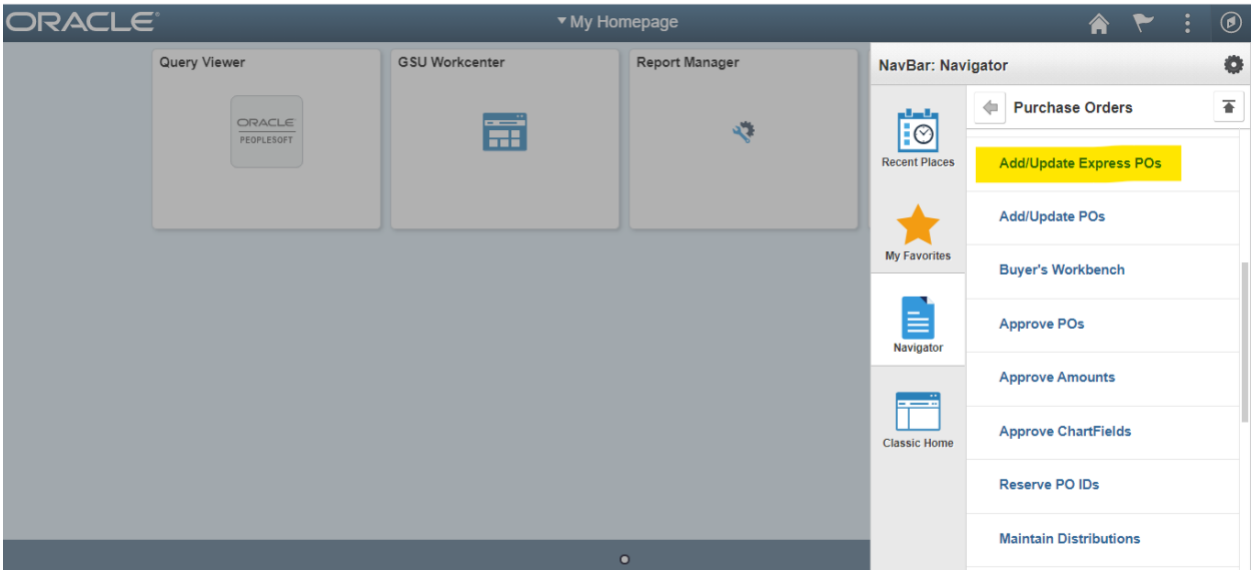
Select Purchasing:



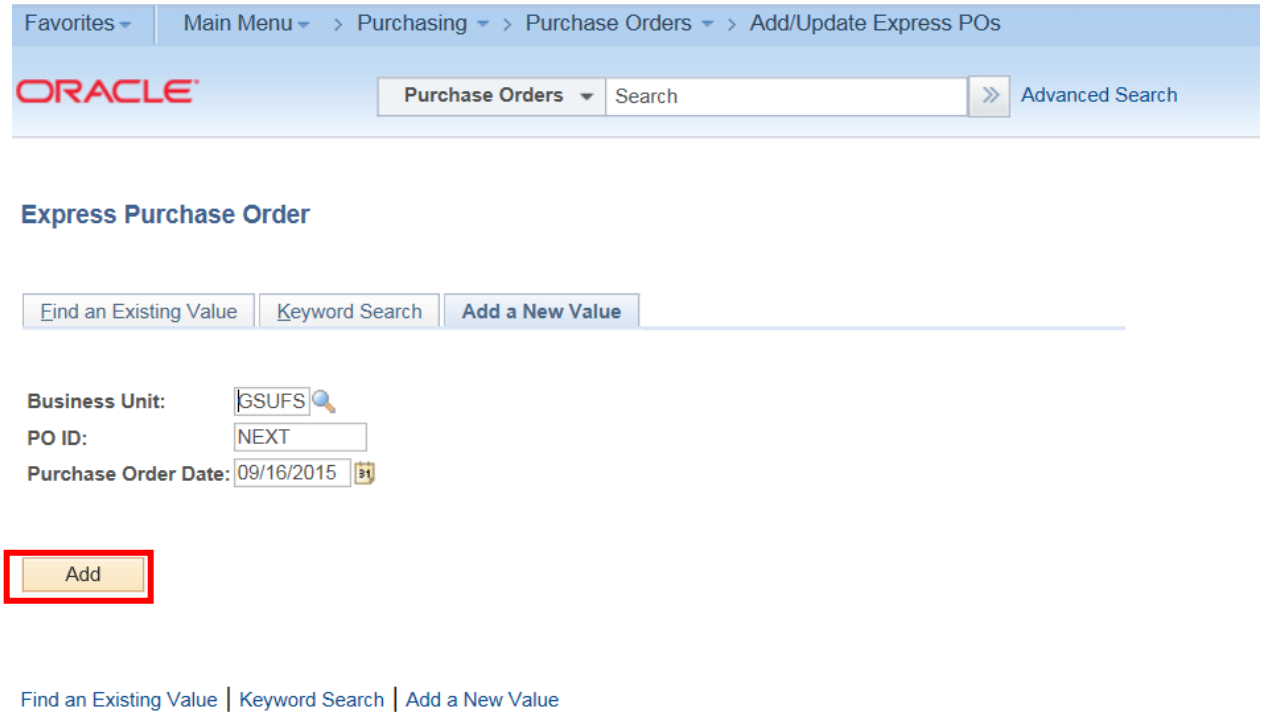
Purchase Orders:



Add/Update Express POs



Purchasing > Purchase Orders > Add/Update Express POs

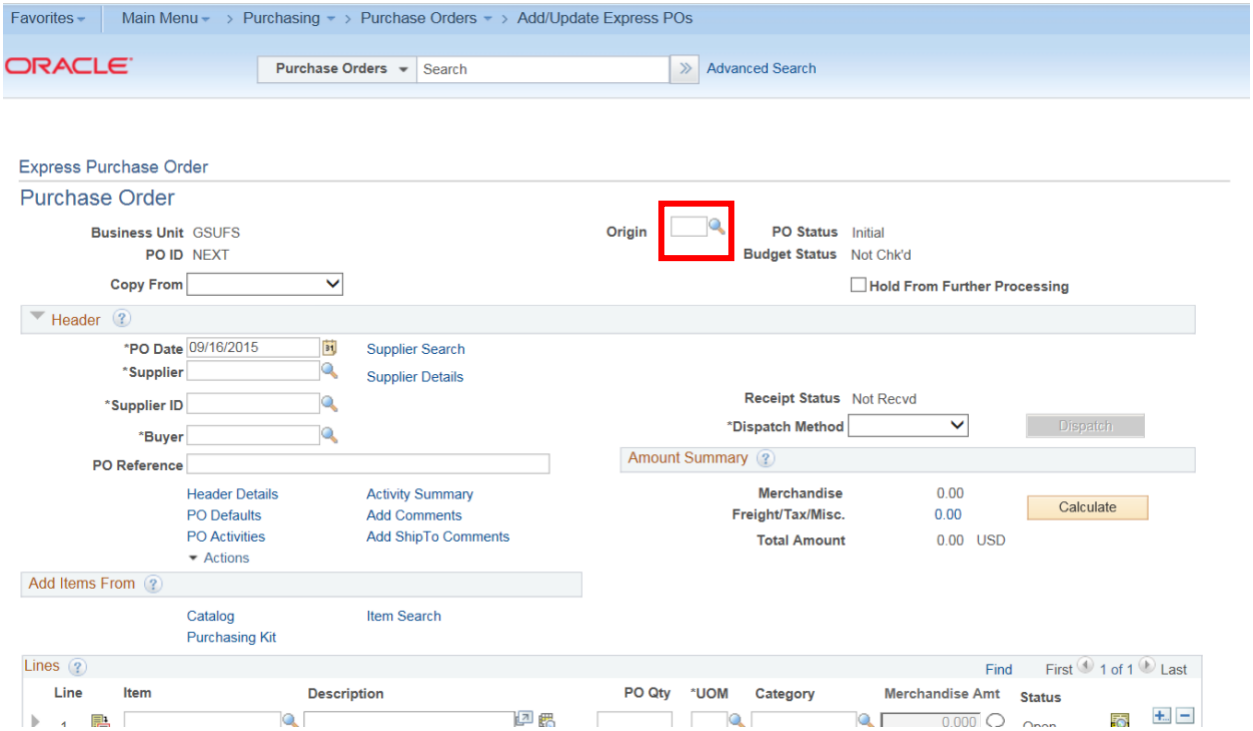


2.1.1 Add Express PO

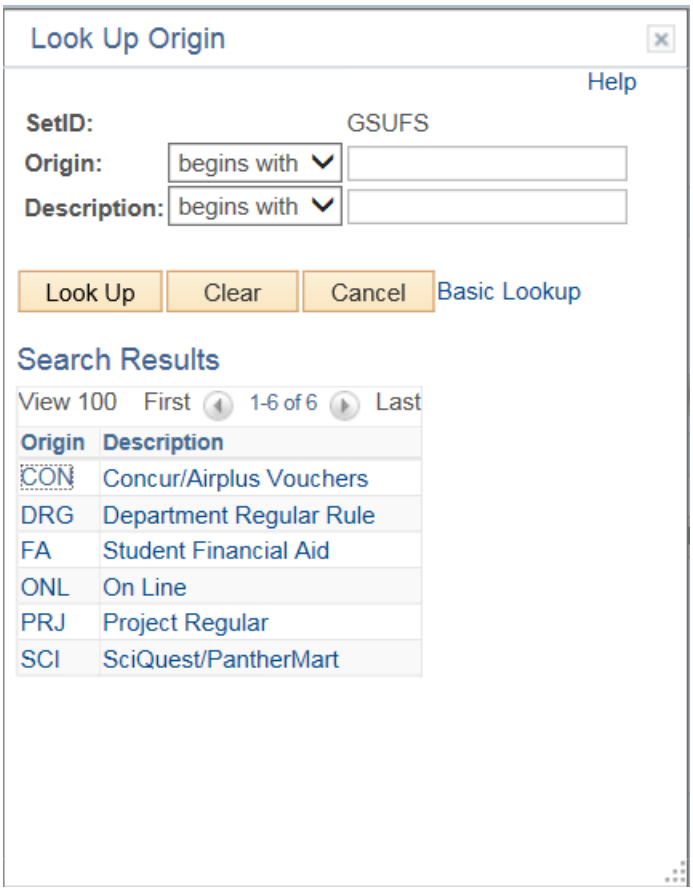
Click on the **Add button**.

2.1.2. Choose the Origin

Click on the magnifying glass

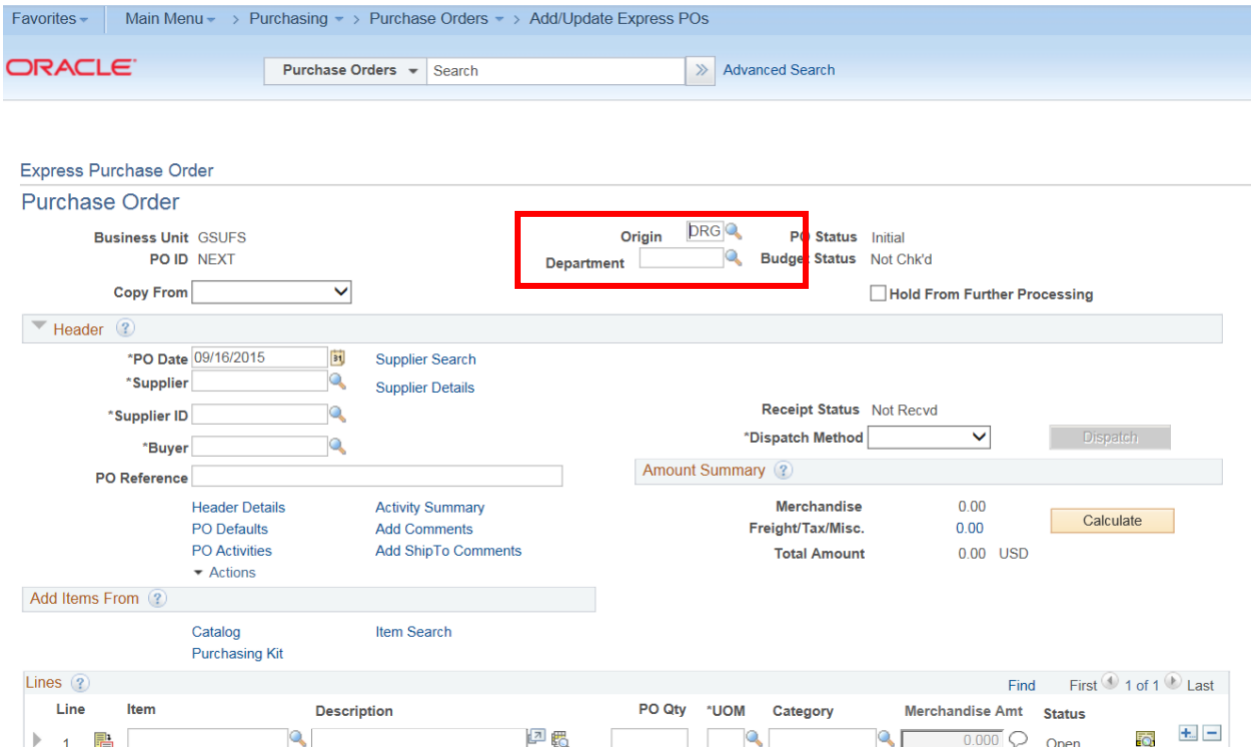


The options you should choose are **DRG (Department Regular)** or **PRJ (Project)**. The rest of the options are reserved for Central Admin areas. These options drive the workflow approval of your Express Voucher. Click on **DRG** or **PRJ**.

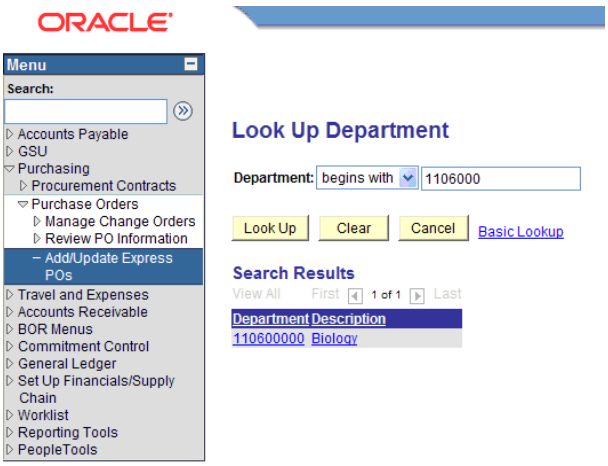


2.1.3. Enter Department ID

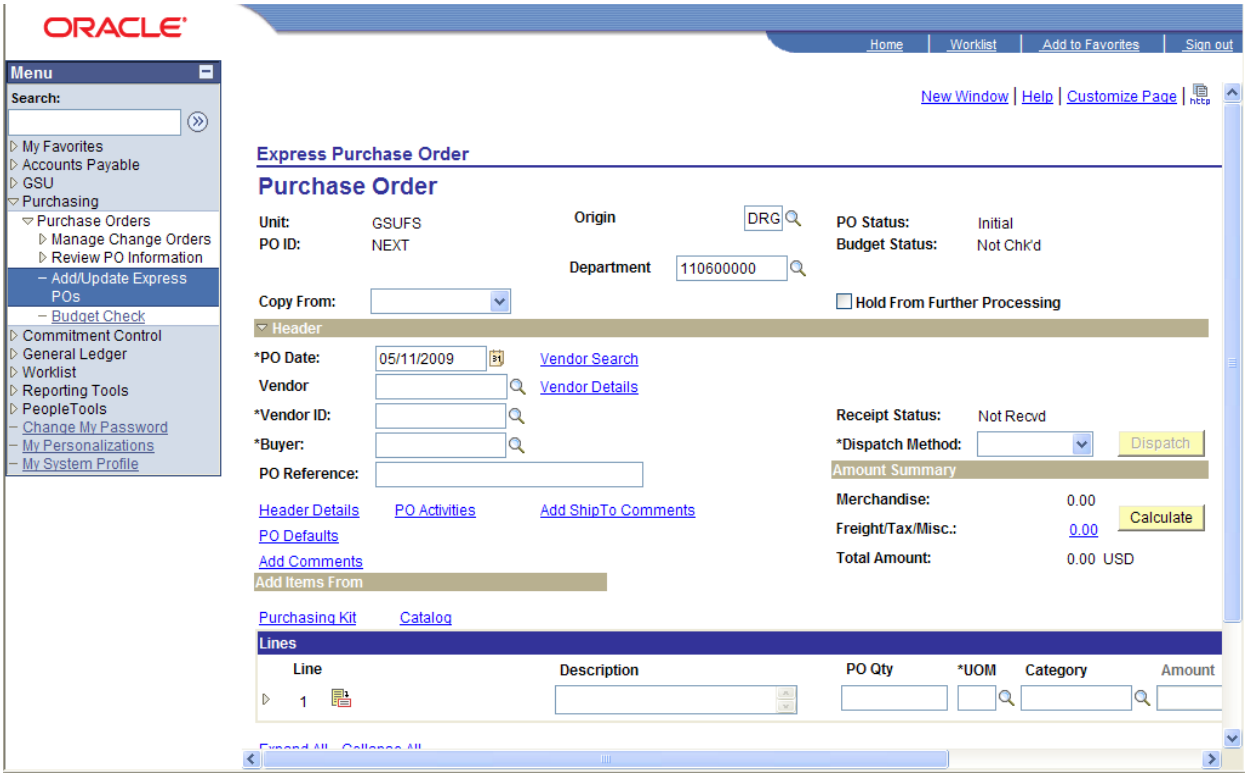
After choosing the origin, the system returns you to the main page. Under the Origin box, you will see there is now a box for the Department. Here, you will enter your 9-digit DRG Department Number or 10-digit PRJ Department Number for workflow approval.



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



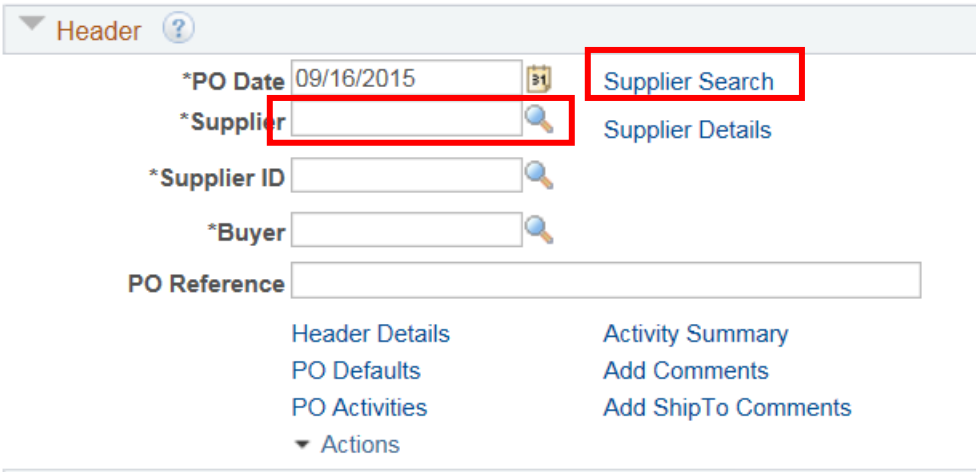
When you choose the Department number from the Search list, you will be redirected to the main page.



Chapter 3: Header Area

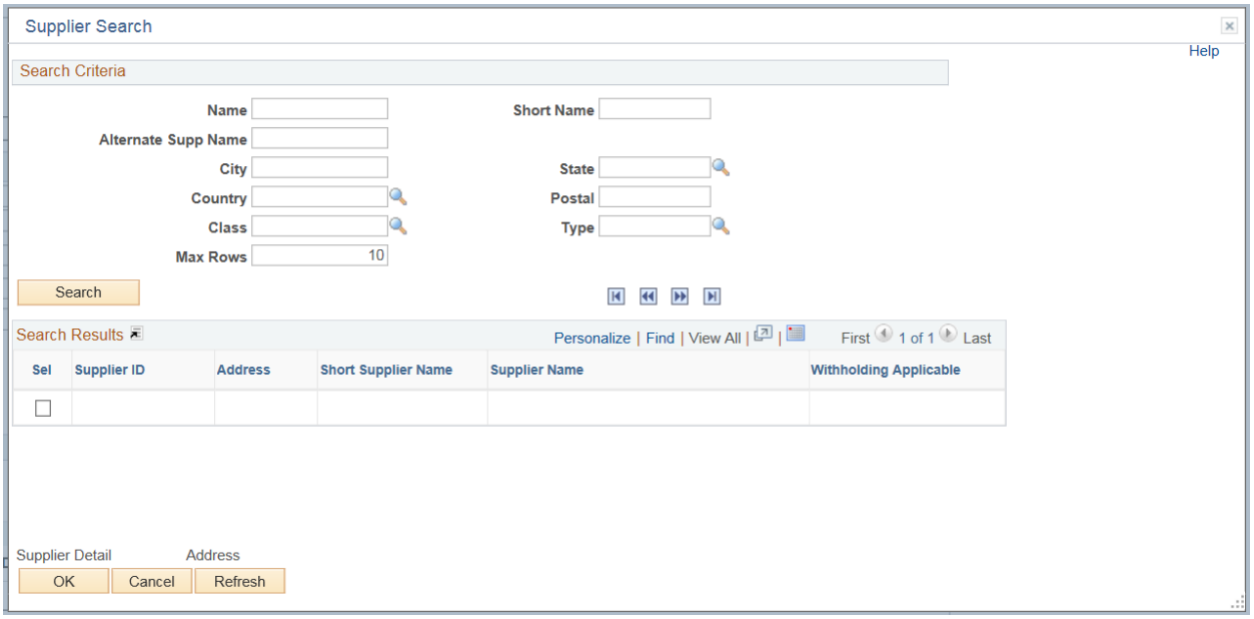
3.1 Selecting a Supplier

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.

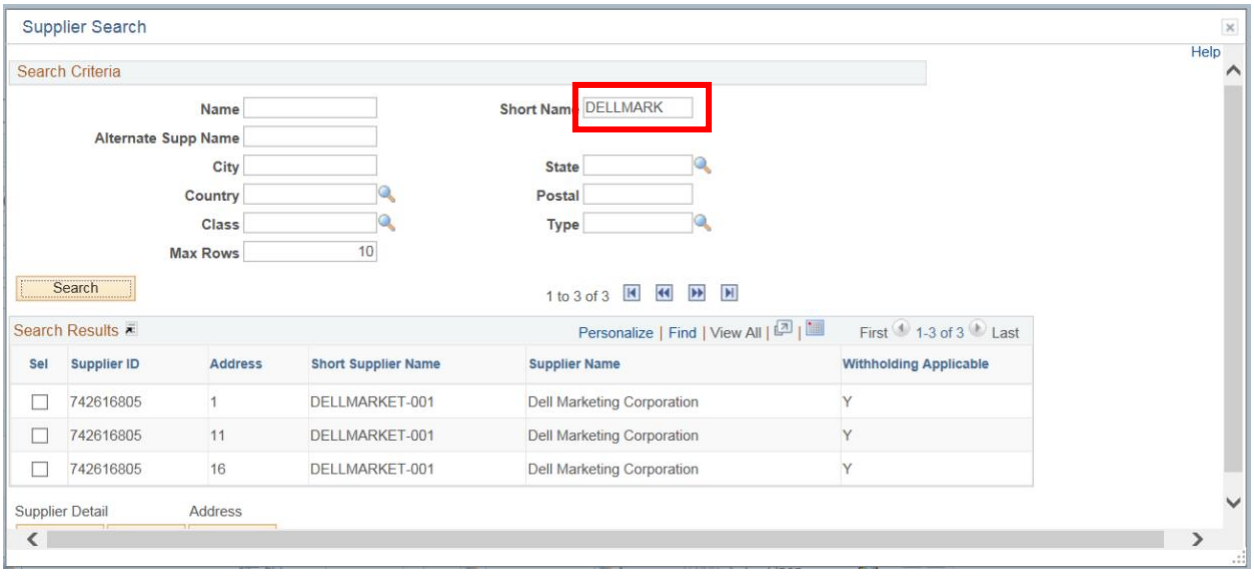


3.1.1. Supplier Search

Click the Supplier Search link.



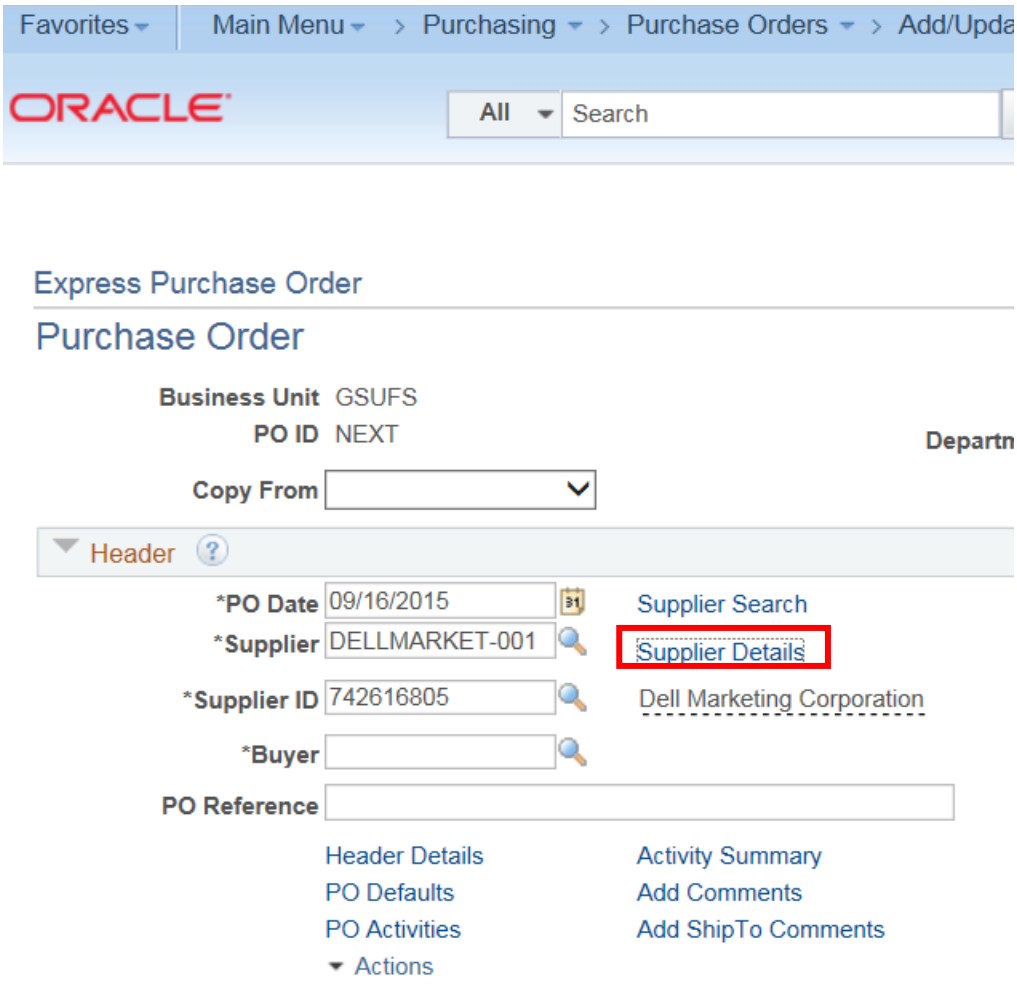
In the ShortName field, type the first few letters of the supplier name and click the Search button.



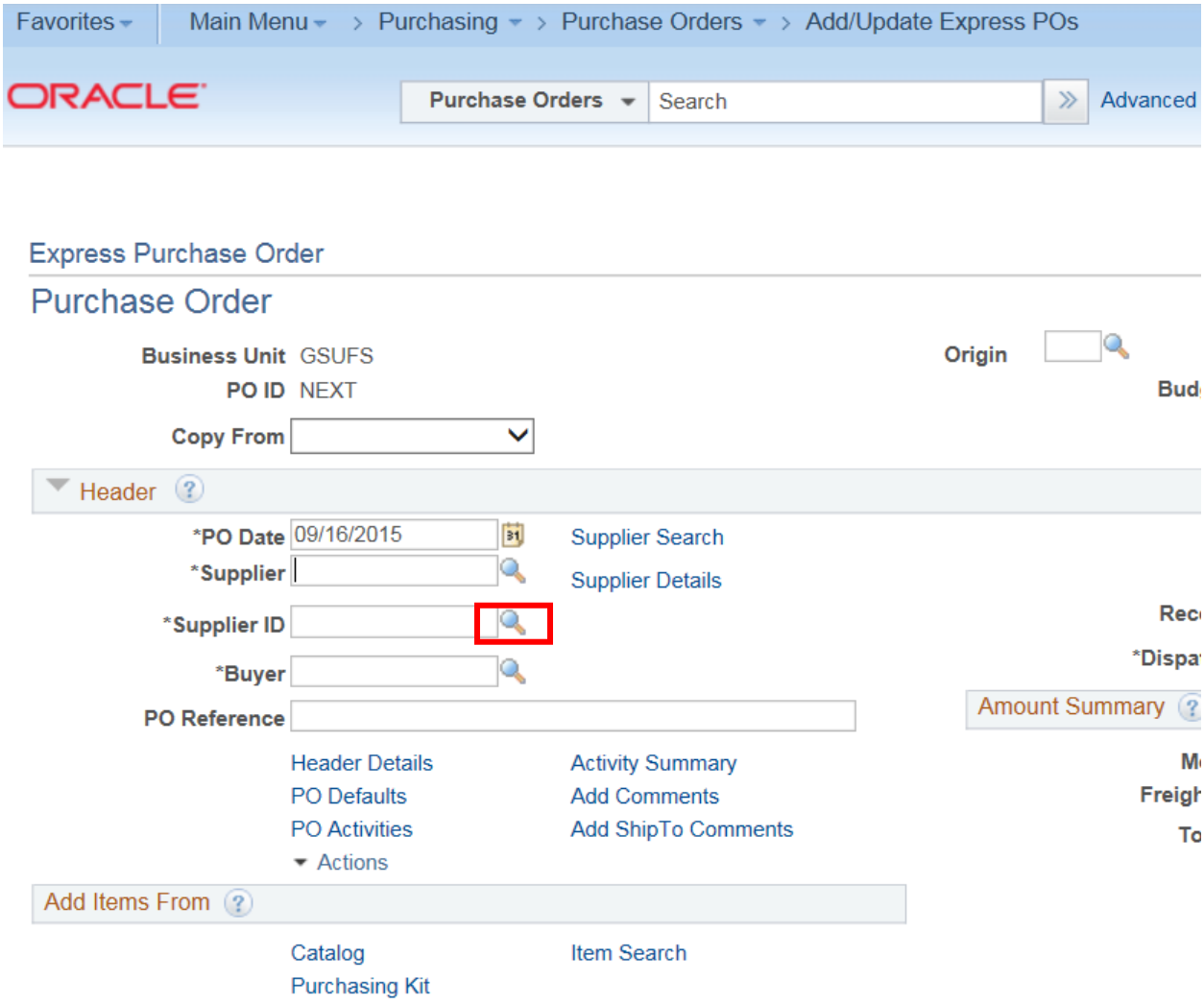
Look for Dell Marketing Corporation in the list.

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

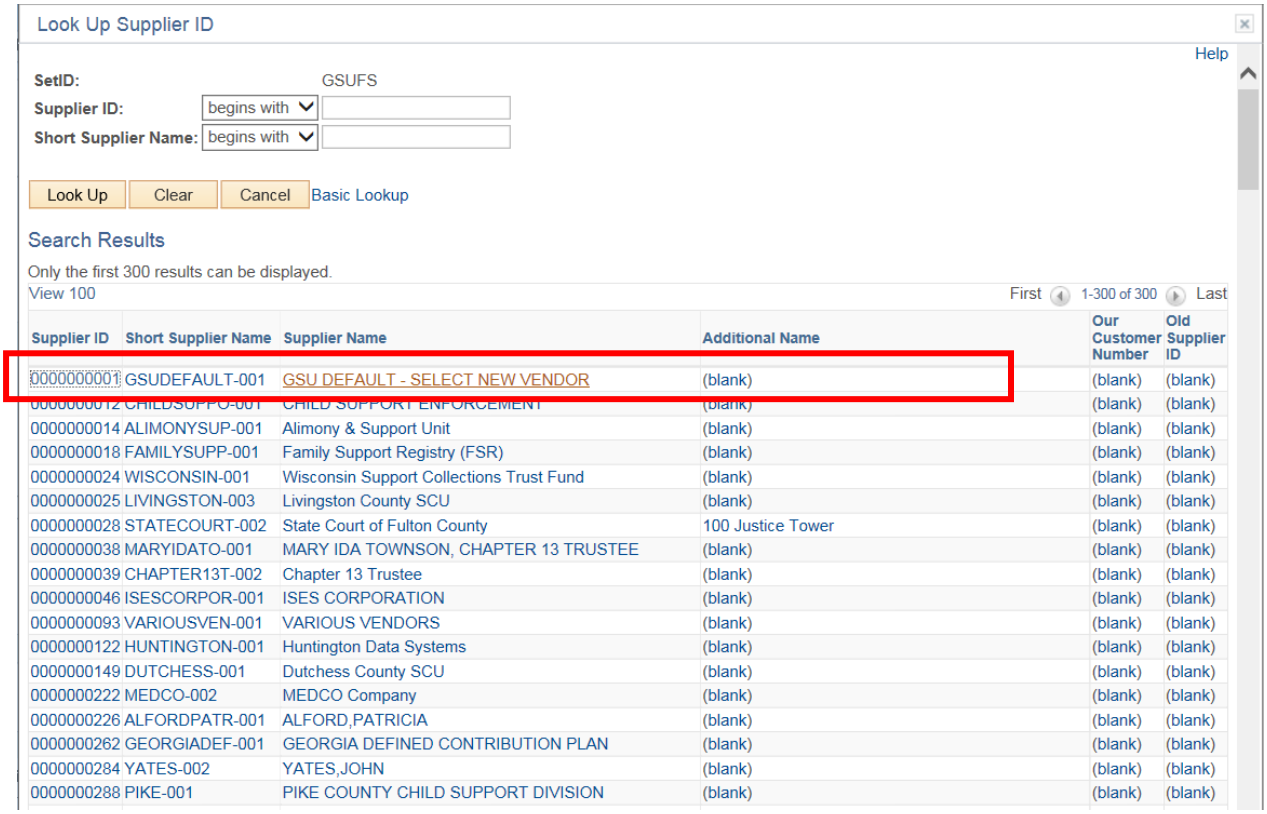
To determine which address you want, you can click the Supplier Detail link to view the supplier address. Click Cancel.



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.


Favorites
Main Menu
Purchasing
Purchase Orders
Add/Update Express POs
ORACLE
Purchase Orders
Search
Advanced
Express Purchase Order
Purchase Order
Business Unit GSUFS
PO ID NEXT
Copy From
Origin
Header
*PO Date 09/16/2015
*Supplier
*Supplier ID
*Buyer
PO Reference
Supplier Search
Supplier Details
Amount Summary
Header Details
PO Defaults
PO Activities
Actions
Activity Summary
Add Comments
Add ShipTo Comments
Add Items From
Catalog
Purchasing Kit
Item Search

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

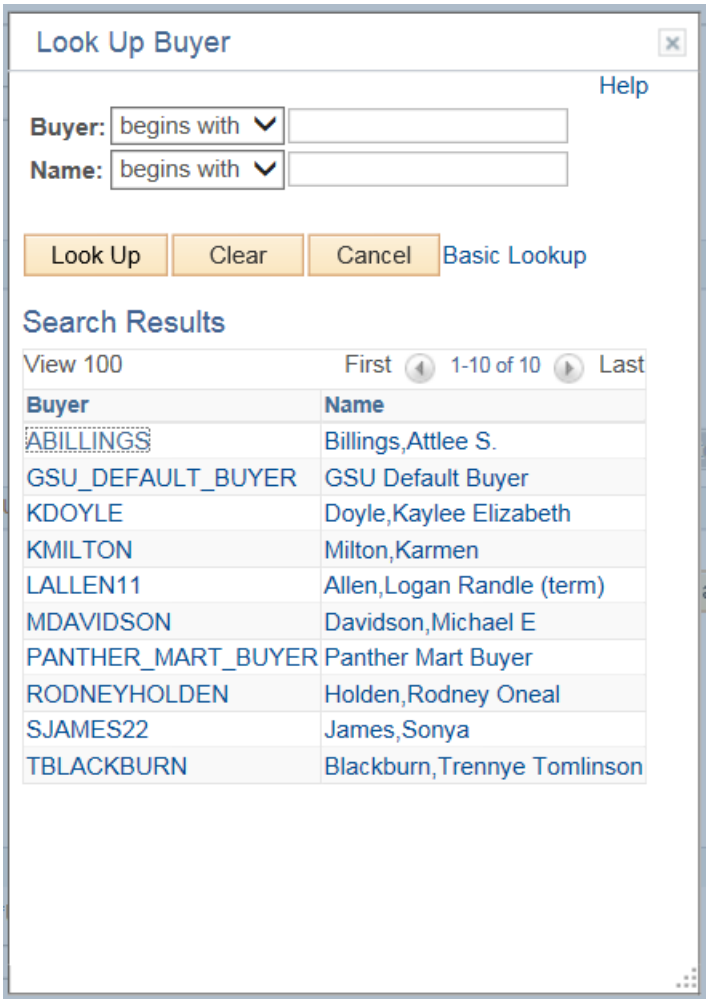


In the Short Vendor Name field, type the first few letters of the vendor name and click the Look Up button. Select the desired vendor and the system will return you to the main page.

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.

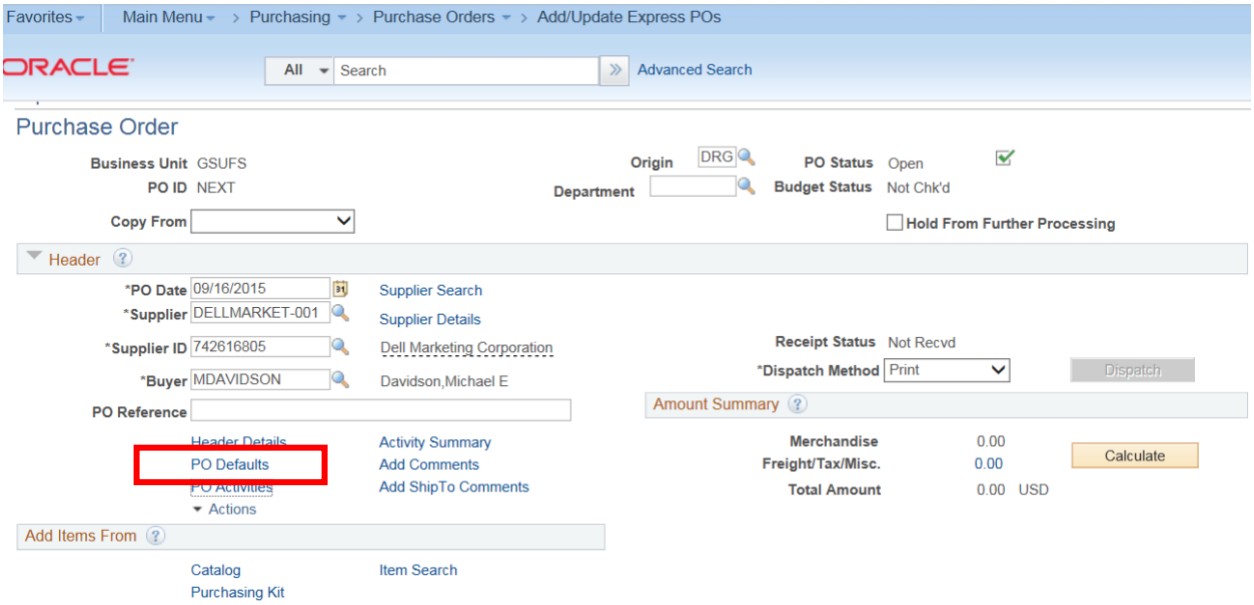
Caution: Submitting Express POs with Default Vendor AND Default Buyer information may delay PO processing.

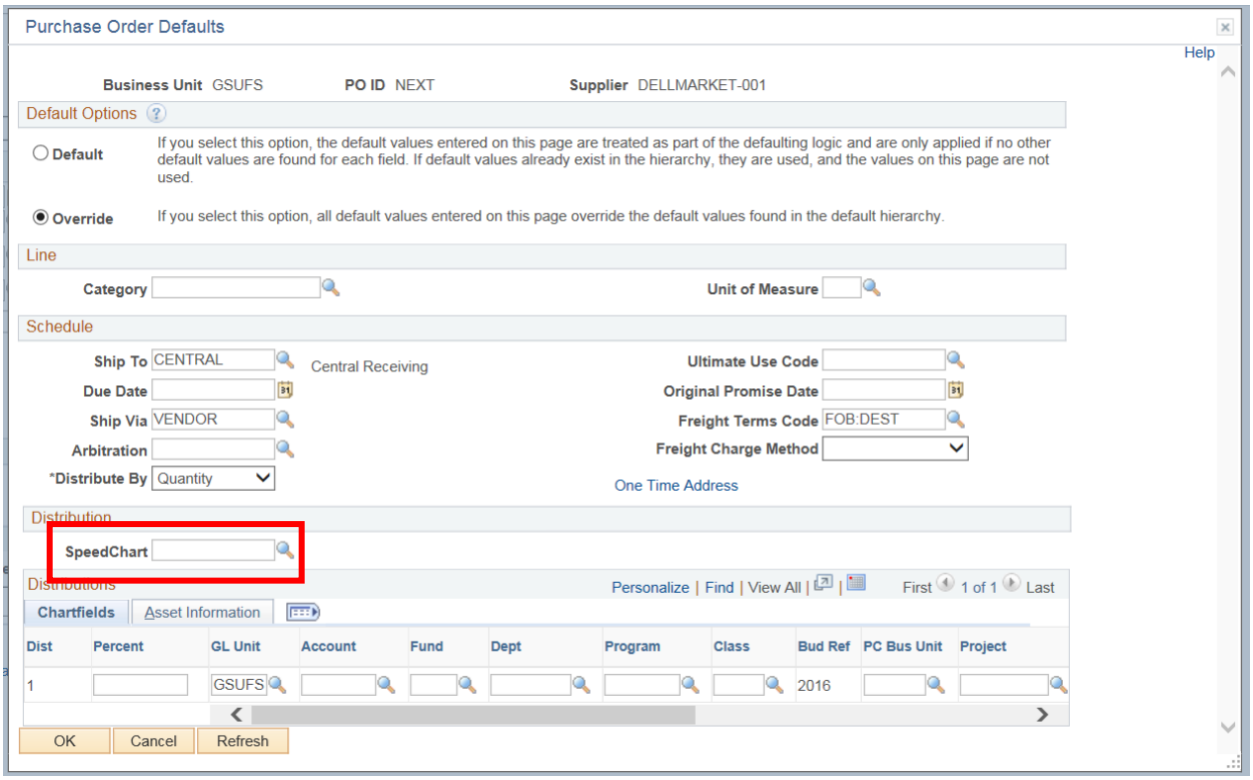


3.3 Entering PO Defaults

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.





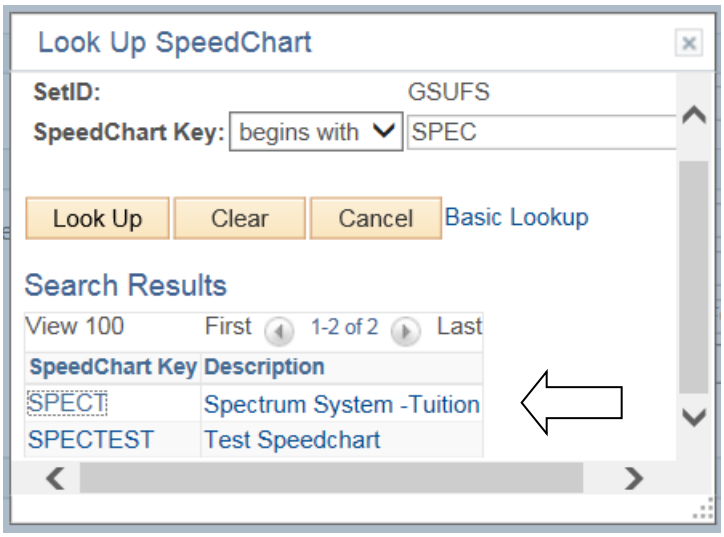
The **Default Options** area defaults to Override to allow you to make changes to the Express PO. This should remain clicked. If you click Default, you will not be able to make any changes to the Express PO if an error is made.

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.

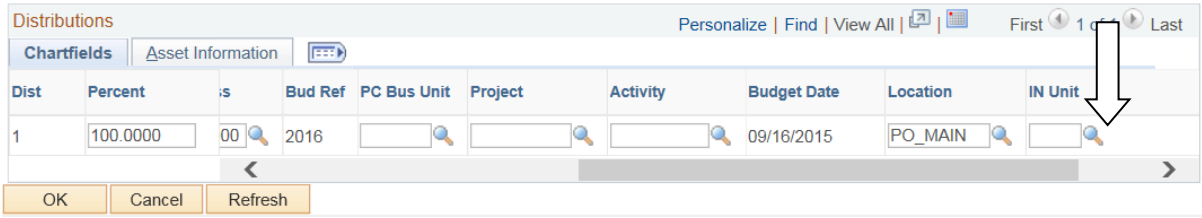


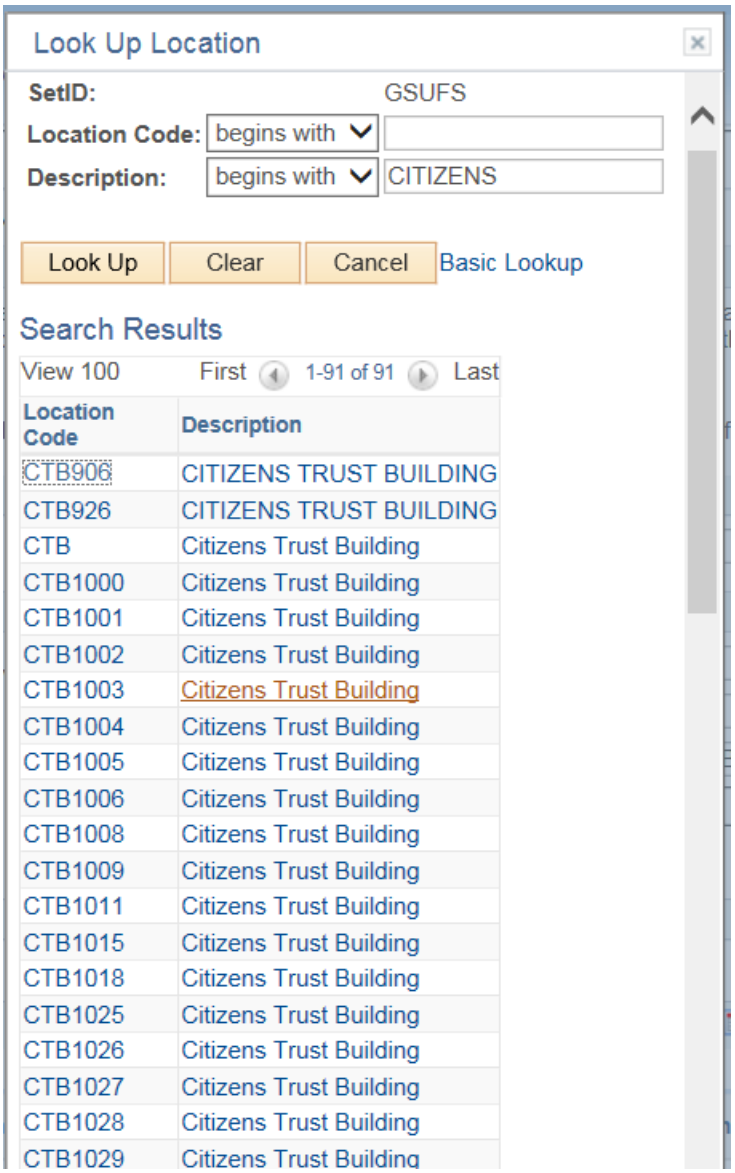
You will be brought back to the PO Defaults page and your information will populate the Distribution field. Scroll to the far right of the Purchase Order Defaults page to see the default Location Code. The location field determines where the goods you are requesting should be delivered to when the GSU 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.

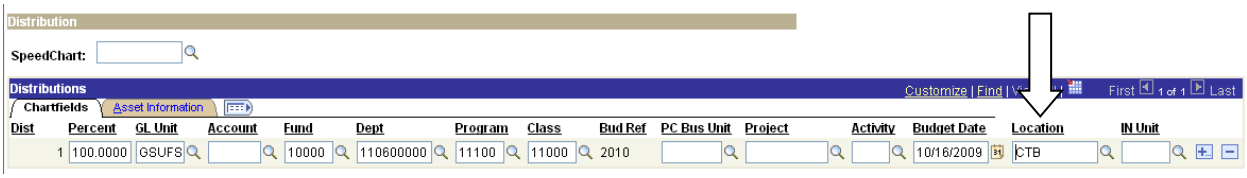
NOTE: Updating the Location Code is required for the purchase of goods, where they will be received by GSU and delivered to a Department. If the Purchase Order is for Travel, Consulting Fees or other services, then changing the Location is not required.

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

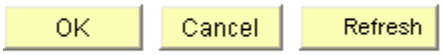




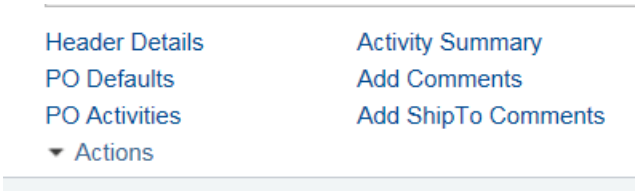
You can search for your Location Code either through the Location Code field or the Location Description field. Select the Location where you want the goods delivered to.



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



3.4 Other Links under the Header Panel



a. **Header Details** contains template information that should not be changed by the requestor. ***Do not change any information in this link.***

b. **PO Activities** will not be used by the end user under any circumstances. ***Do not change any information in this link.***

c. **Add Ship to Comments** can be used by the requestor if there are special delivery instructions.

d. **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

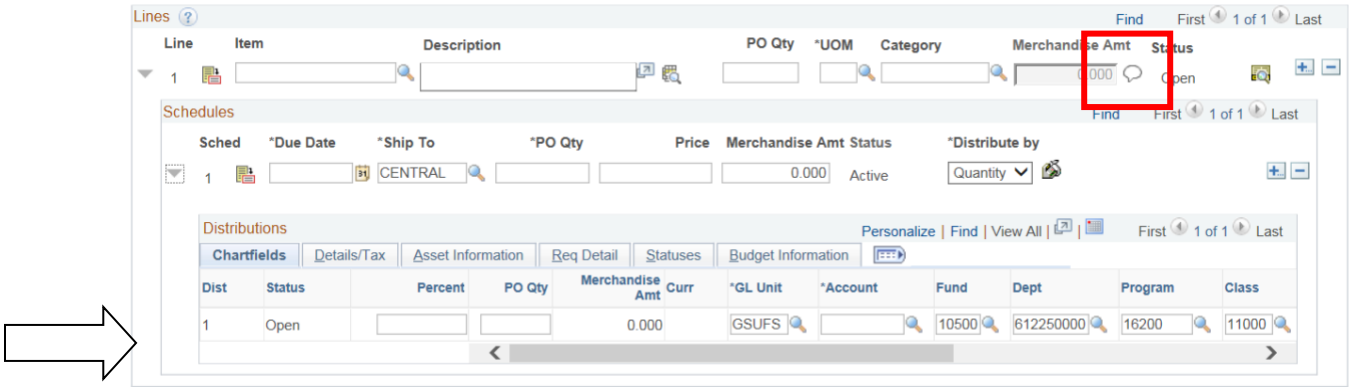
As mentioned previously, the Express PO allows you to enter all of the required information on one page. The Lines area is where the Line Description, Quantity, Unit of Measure (UOM), Category and Price will be entered.

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.

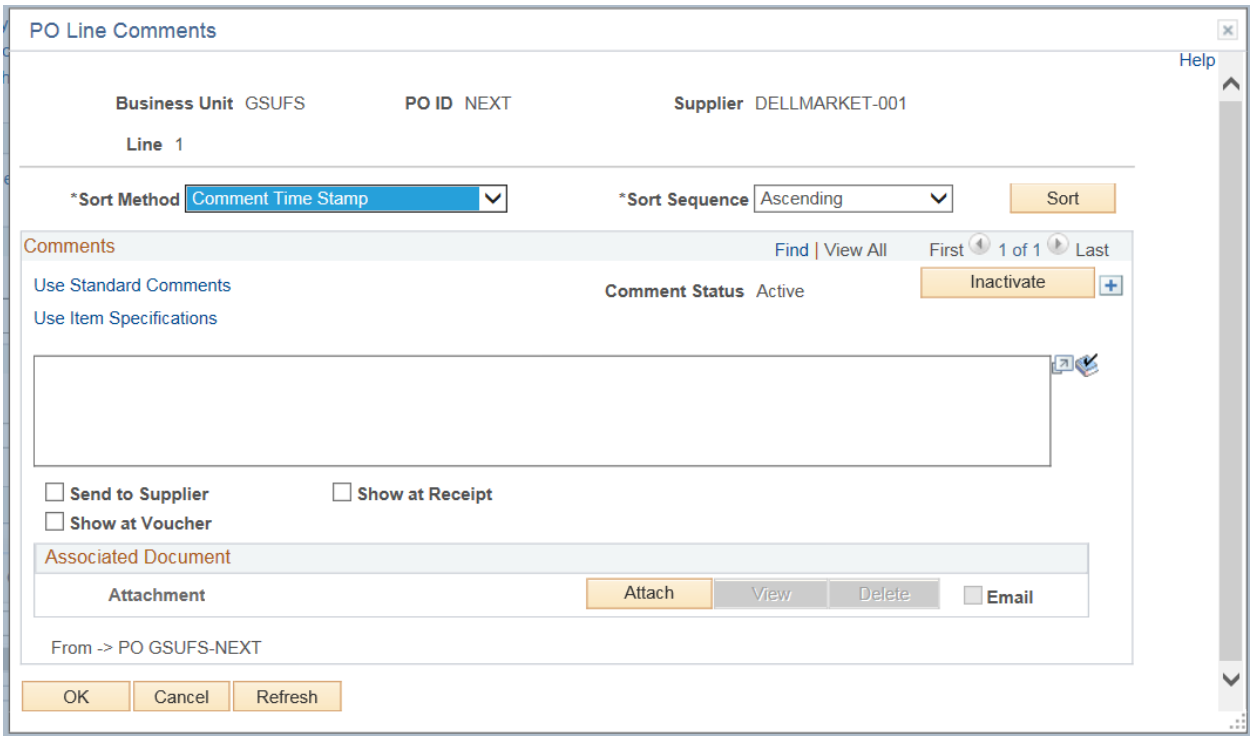
4.1 Lines

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.

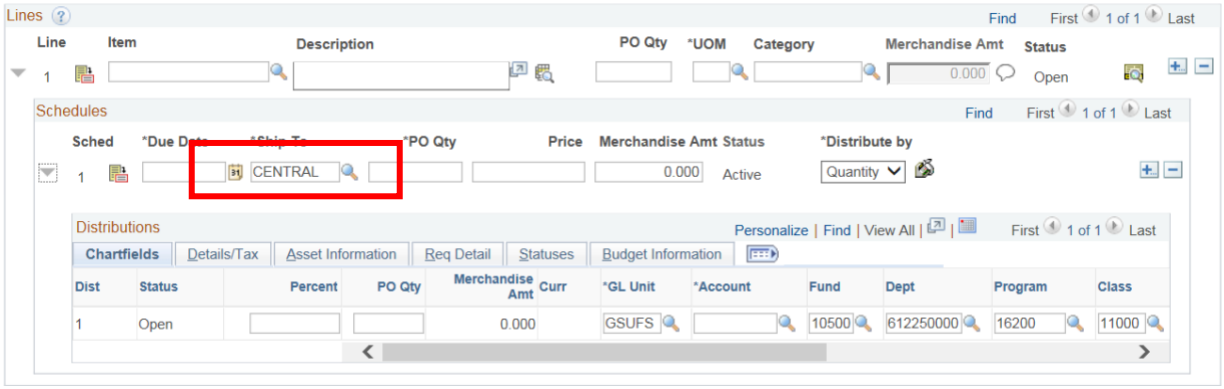


Please note you will not use the Copy Item Specs link. Also, the Attach button for attachments will not be used. Type your line comments in the Comment field and click OK.

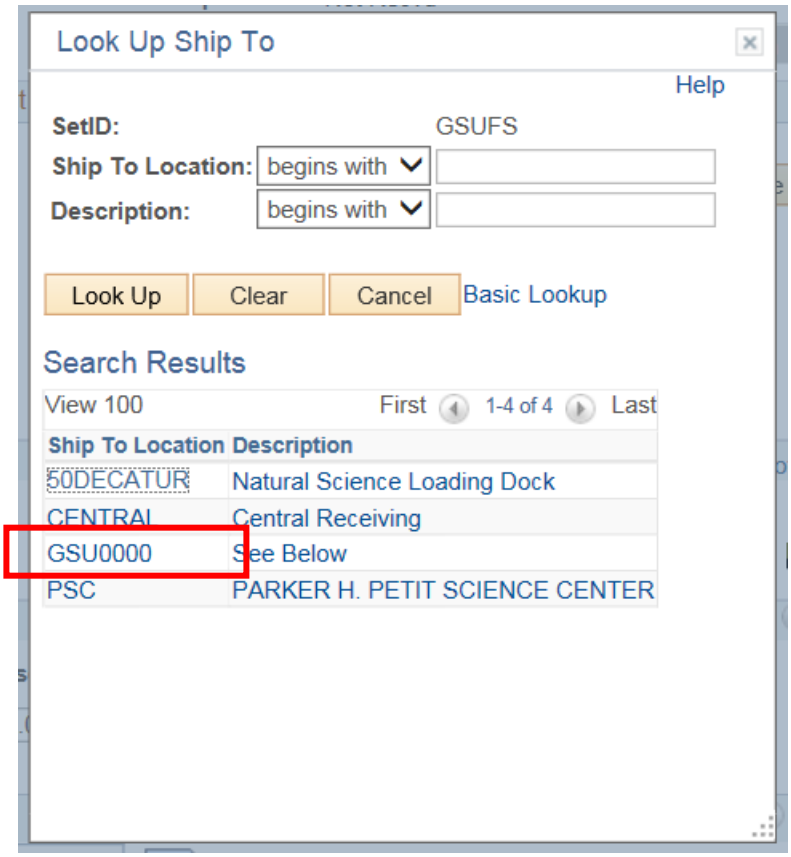


4.1.2 Selecting Ship To Location

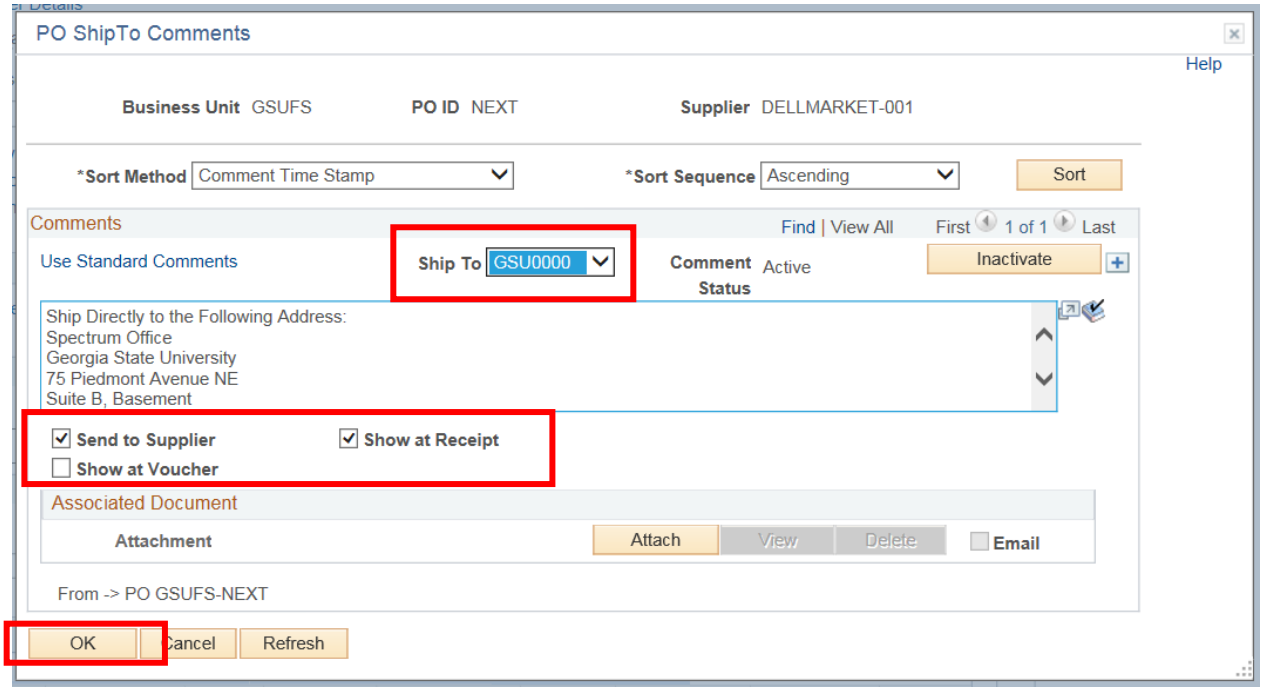
Click on the **'Ship To'** field to determine where your package is shipped to. The **'Ship To'** field will default to ***CENTRAL***. Use the magnifying glass to select a different location only if necessary.



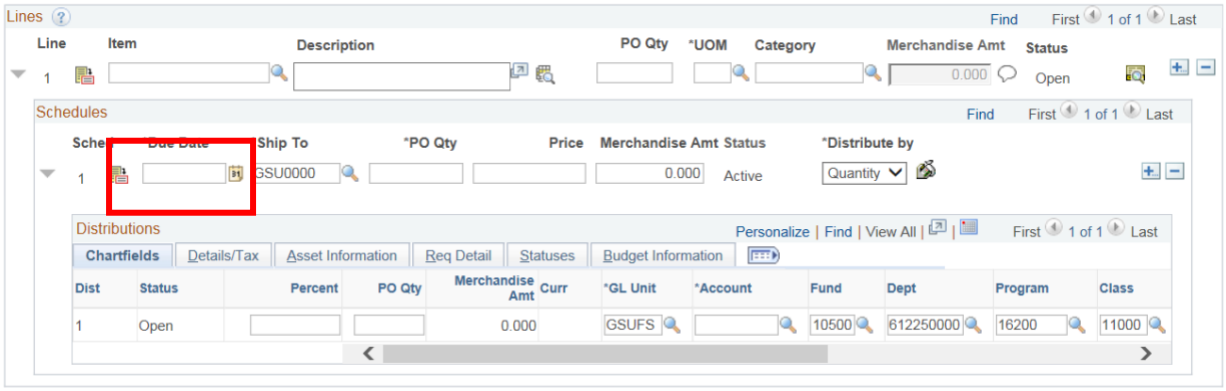
Non-inventory items or special items which have to be installed can be sent directly to a specific location by using the magnifying glass and selecting **'GSU0000'.**



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.



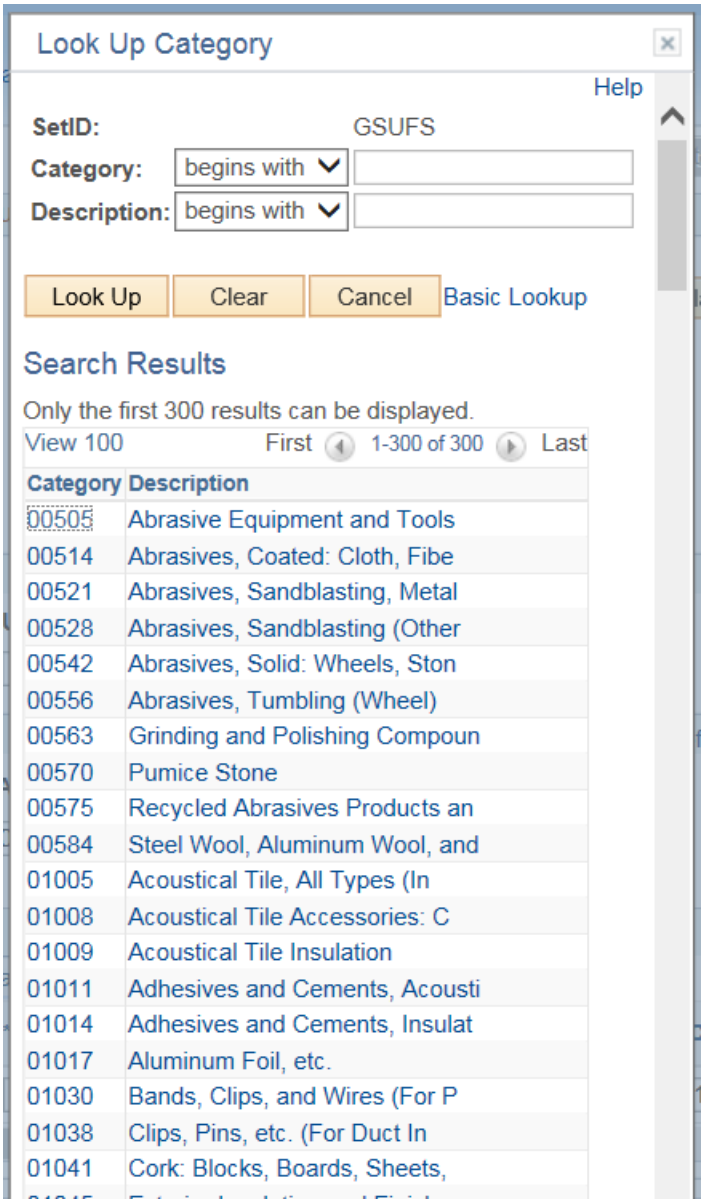
4.1.3 Select a Due Date



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.

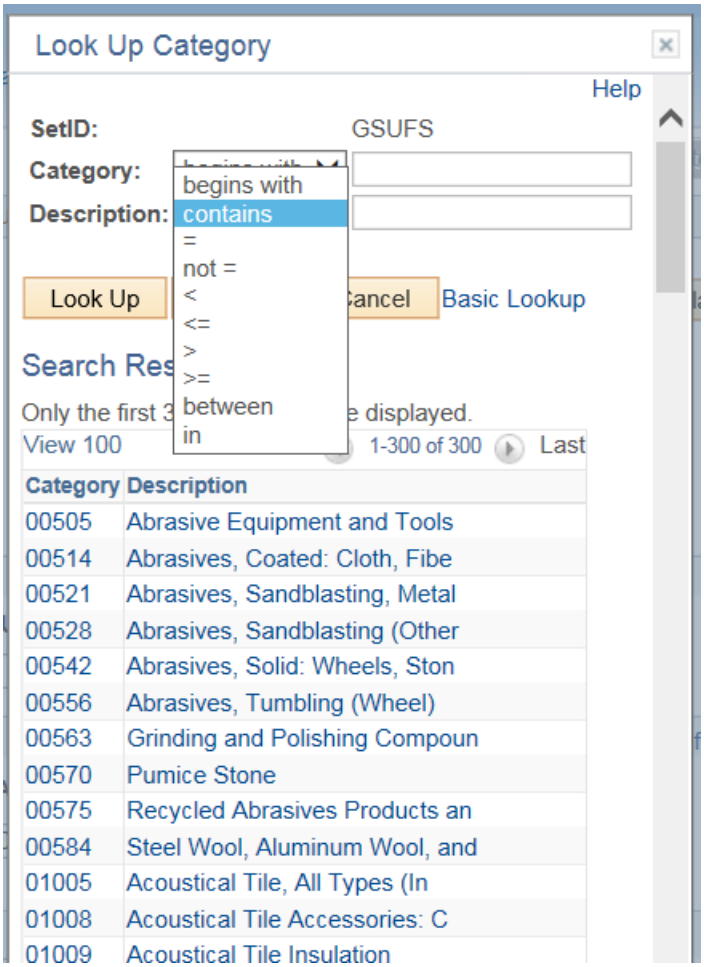
4.1.4 Entering the Category and Price

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



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.

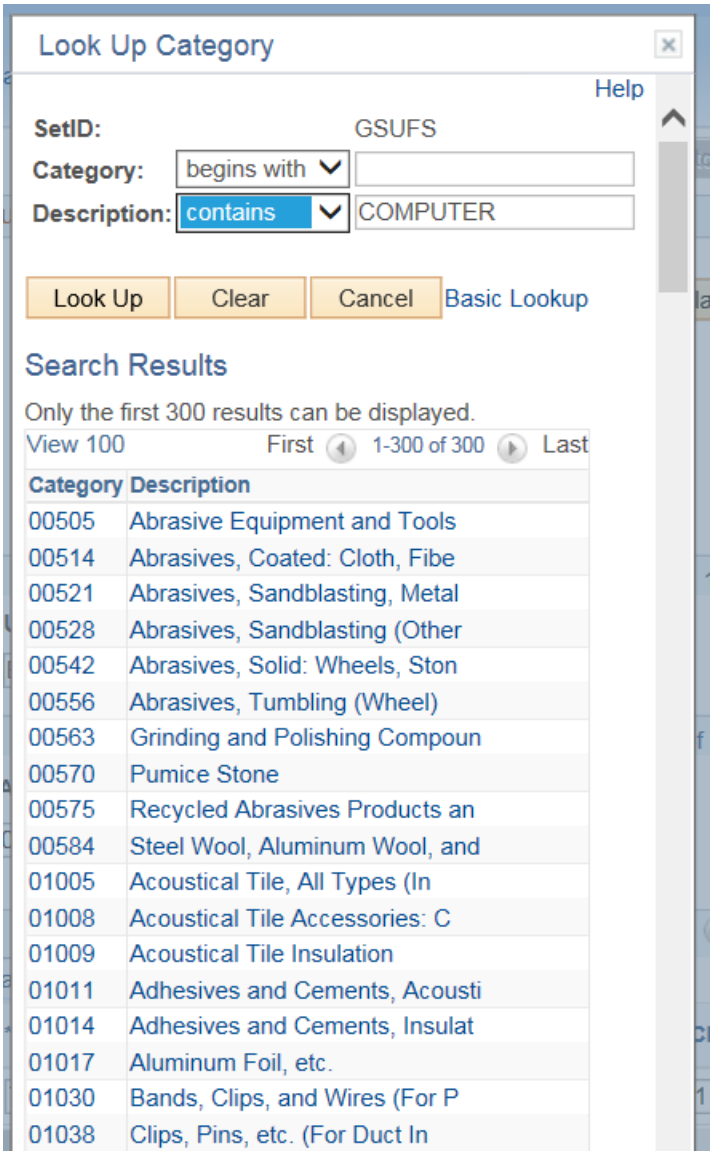
As you may be unfamiliar with the category codes, you may conduct your search by Description. The search offers operands to help you narrow your results. Click the drop down arrow next to Description.



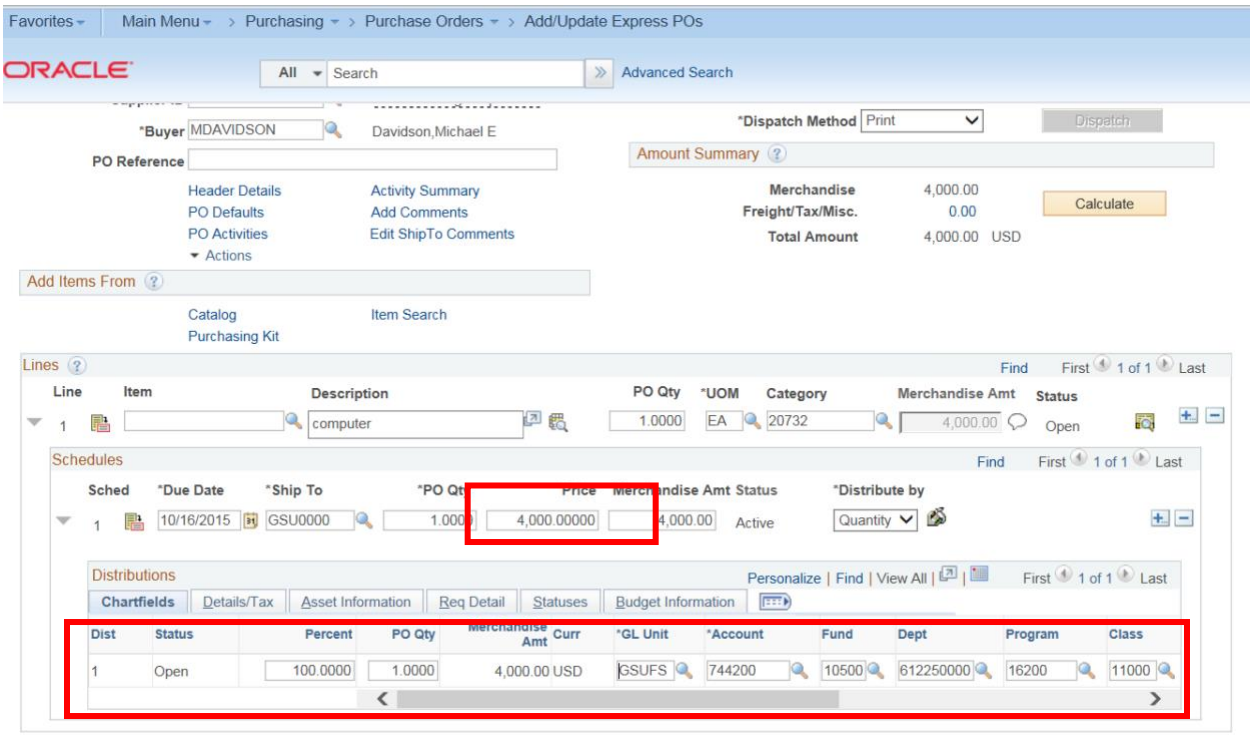
To be sure the best choice possible is made, select the operand “contains”. Then enter the item you wish to purchase.

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
Help
SetID: GSUFS
Category: begins with
Description: contains COMPUTER
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

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

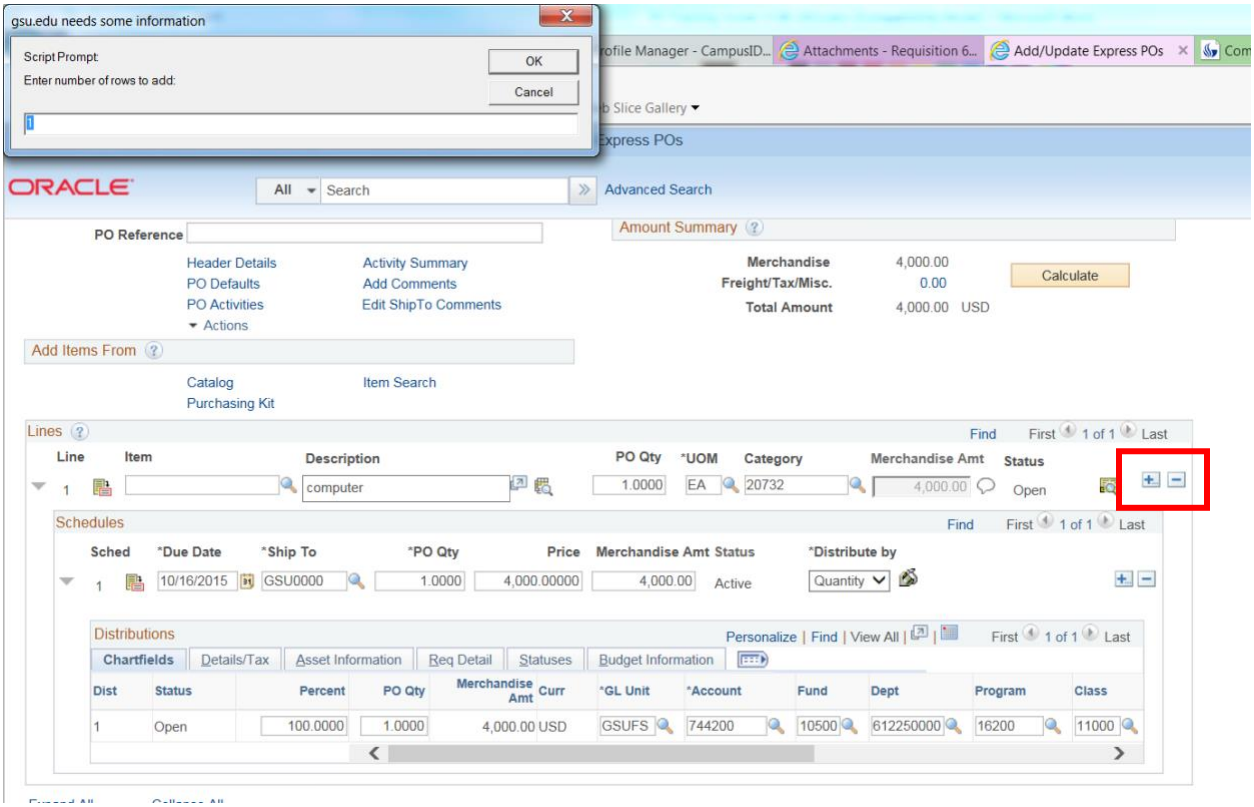


4.2 Distributions Line

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

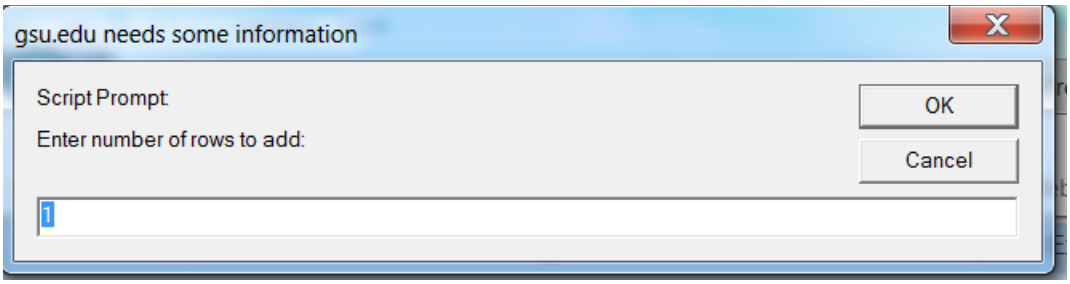
4.3 Adding and Deleting Rows

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.



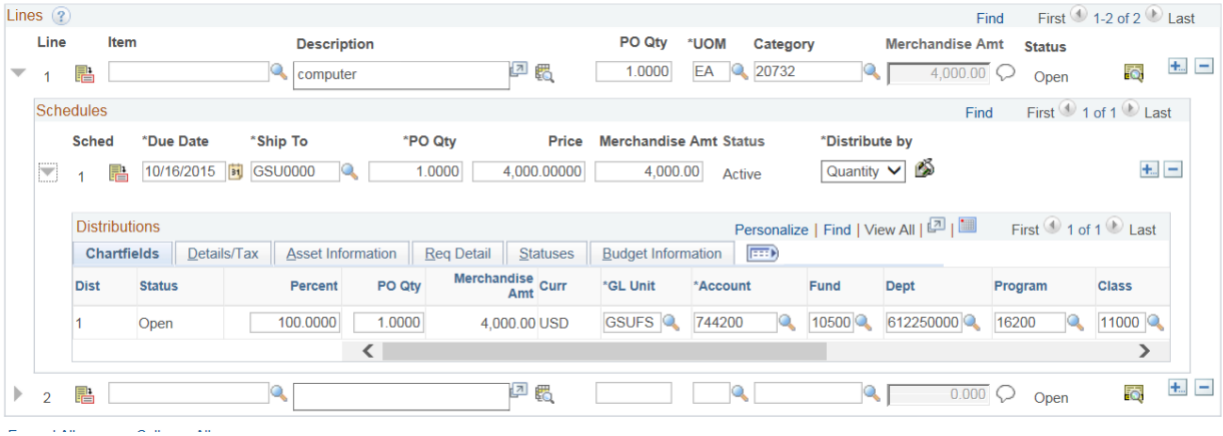
Note: If your computer has a pop-up blocker, you will have to make sure to turn it off for the 9.2 site.

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.



Click OK.

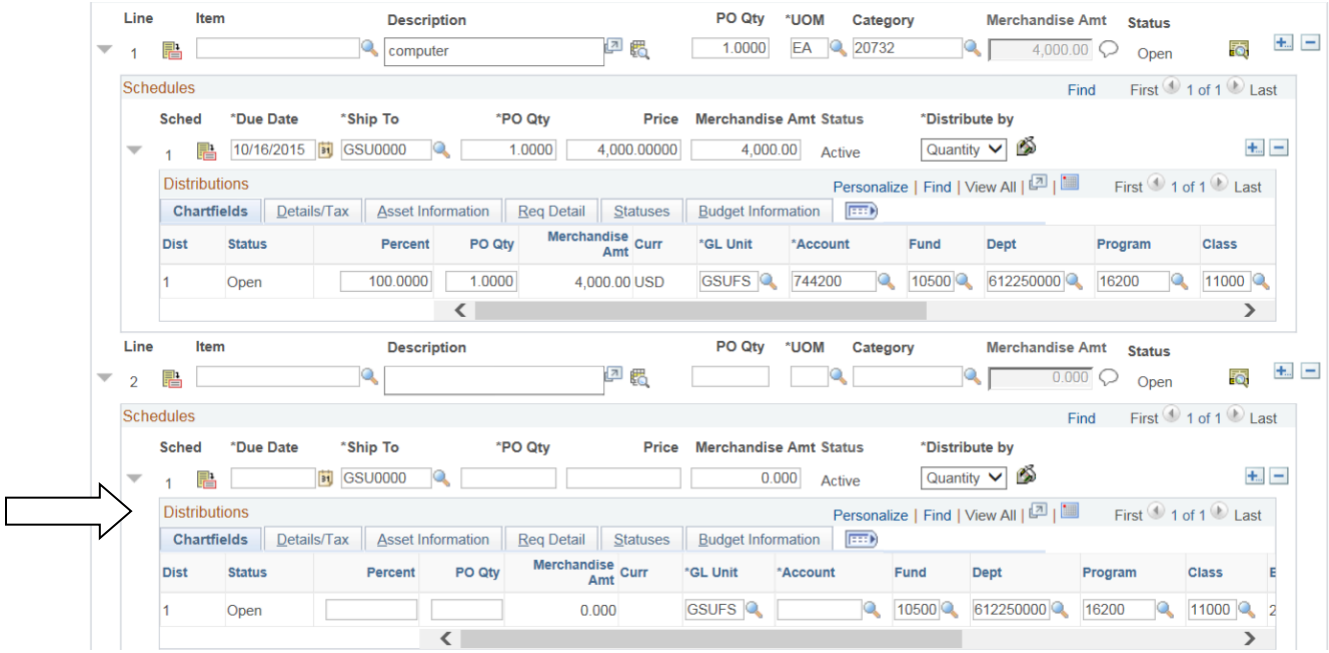
Now there is an additional line added to the Express PO:



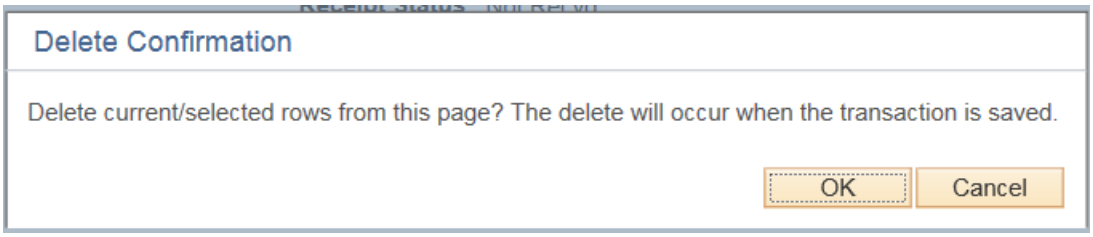
When you click the Expand All link, you will find the Schedules and Distribution lines are added, as well. Also,note that the SpeedChart entered in PO Defaults has defaulted into the new line.

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.



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.

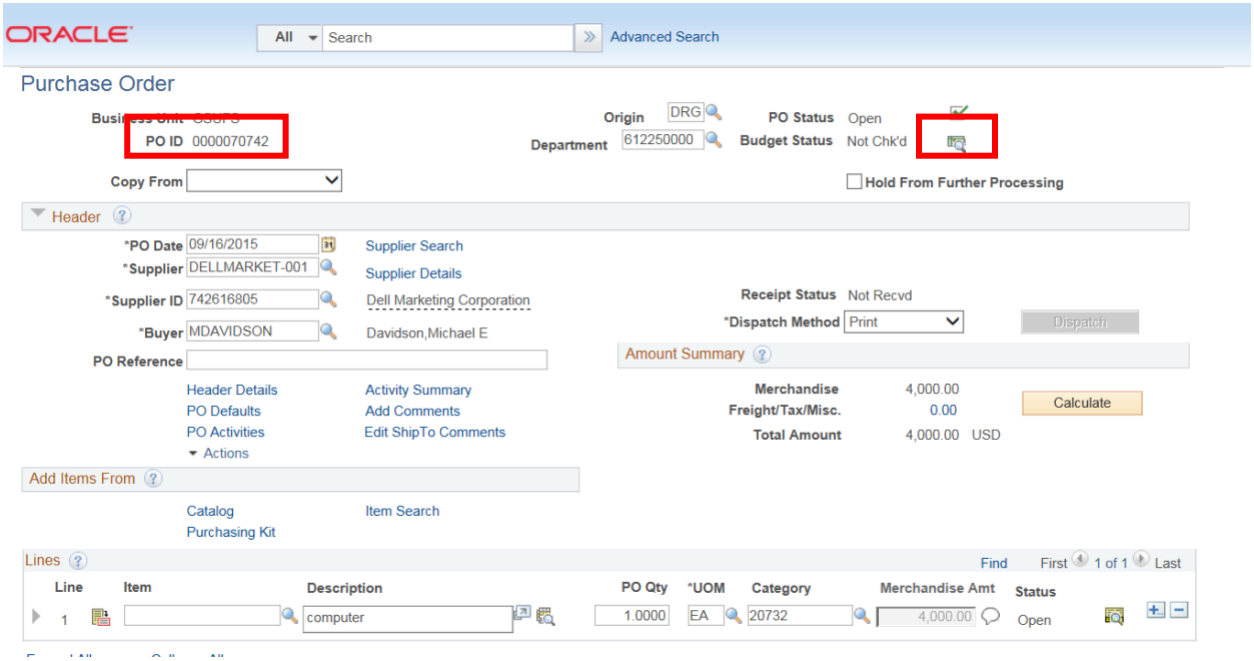


5. Edit/Save Express PO

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.

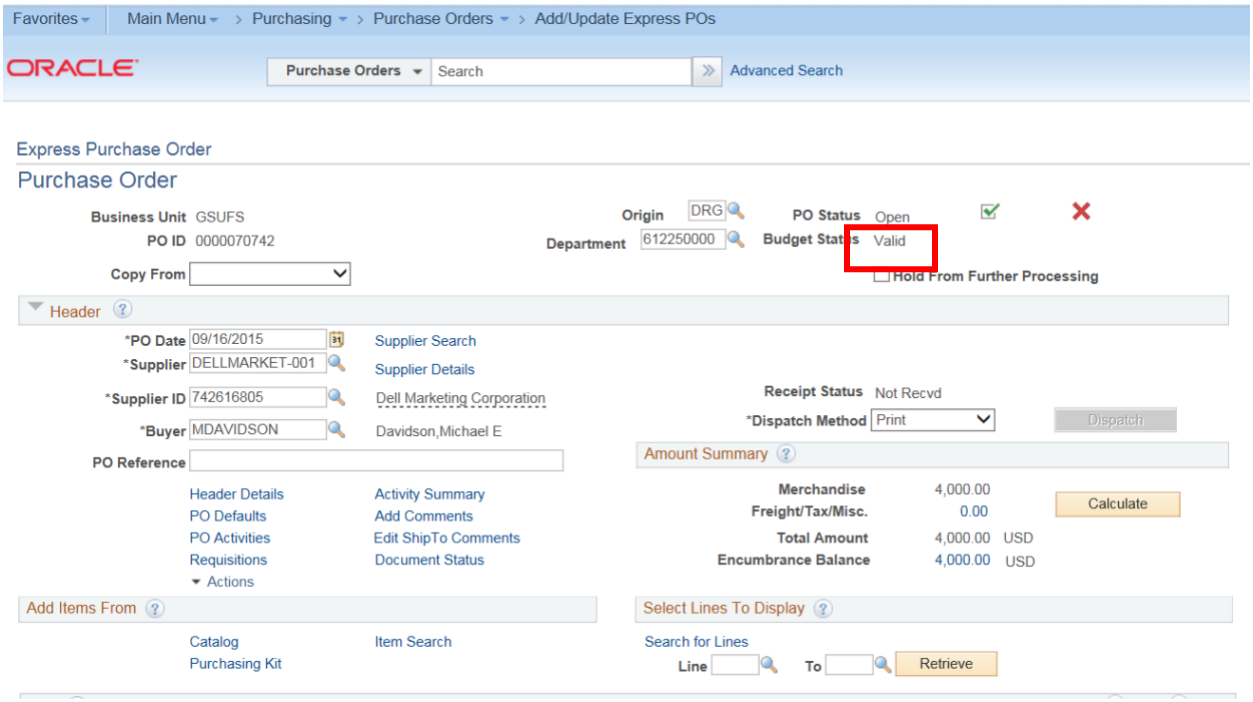
6. Budget Checking the Express PO

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



Click the Budget Check icon .

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



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 be 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:

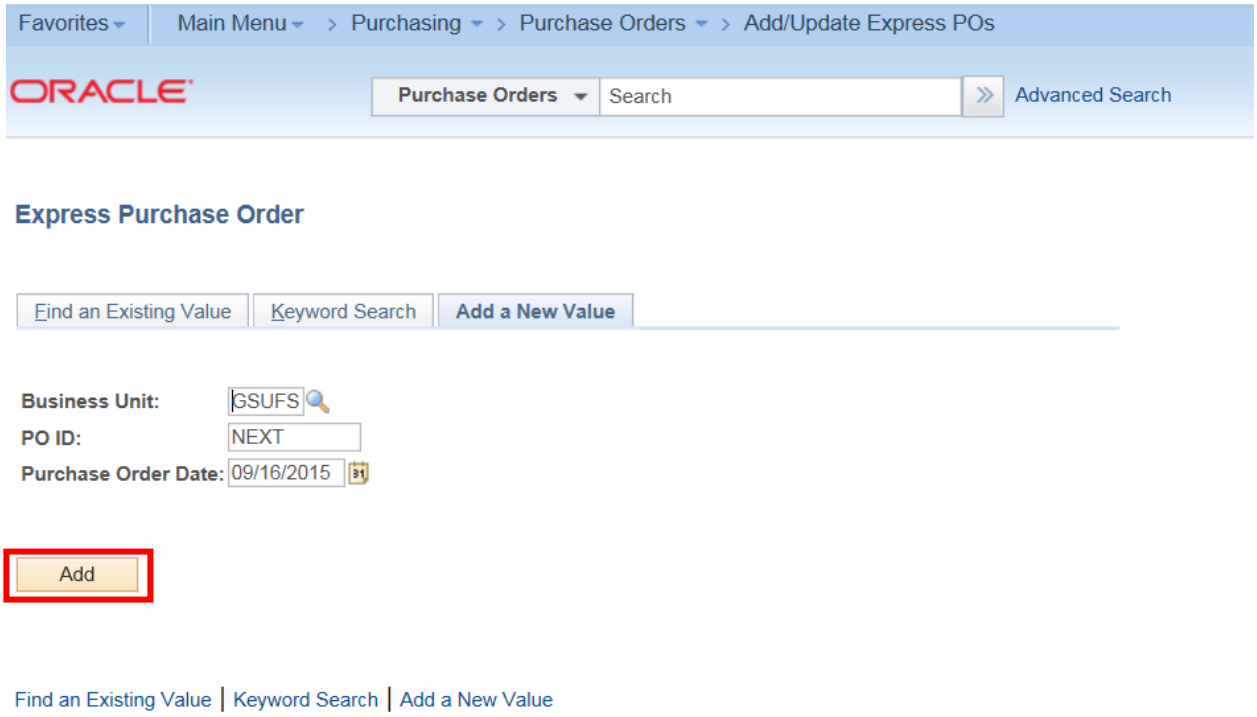
Purchase Orders - DRG	Purchase Orders - PRJ
Department Approver 1	Project Approver 1
Department Approver 2	Project Administrator
	Project Approver 2

8.0 Copying an Express PO from An Existing Express PO

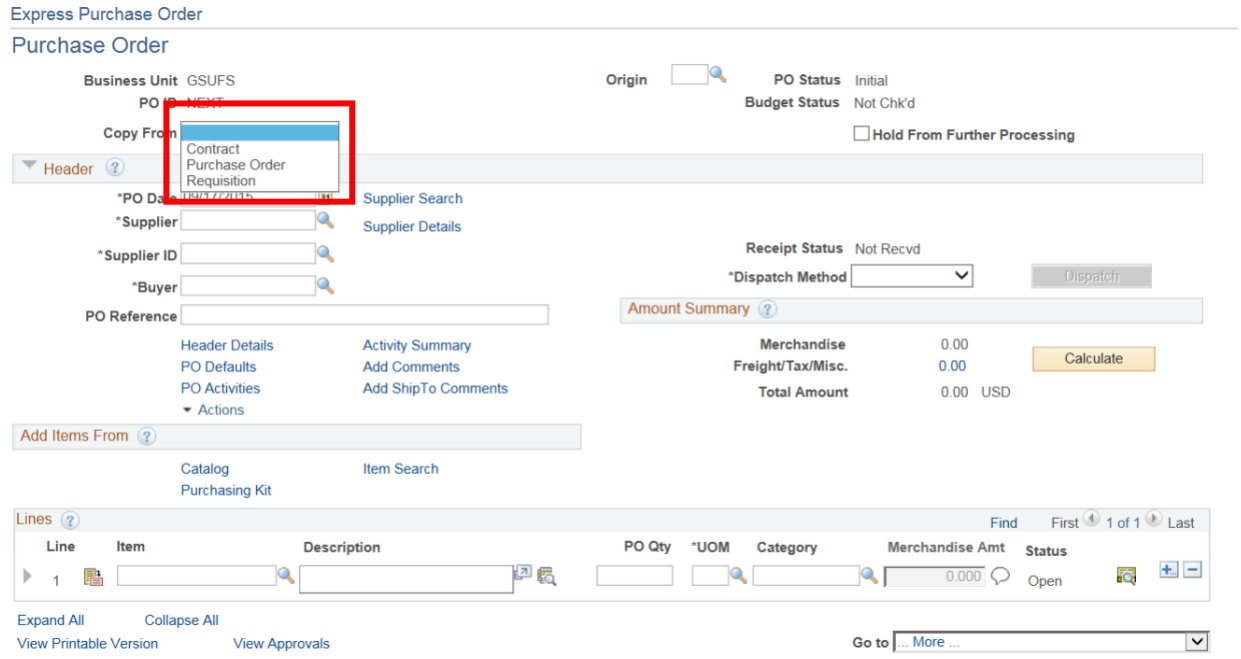
When creating an Express PO for Travel or an Consulting Contract, there is a Express PO template available for you to copy.

8.1 Creating a Travel PO/Consultant PO

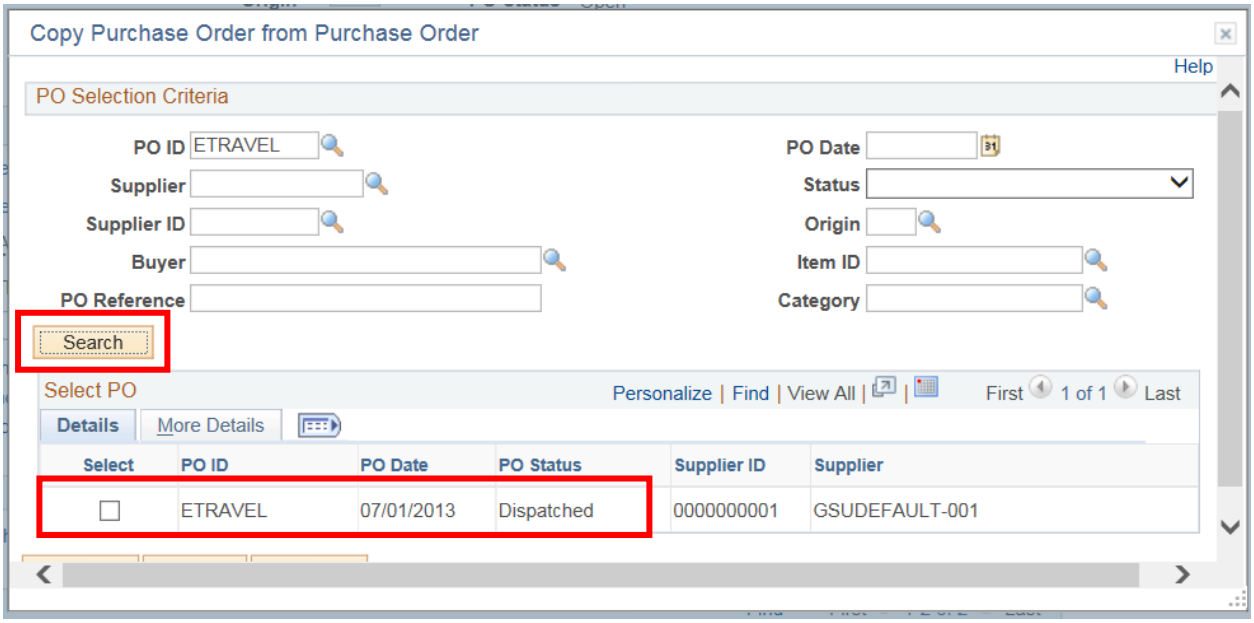
Click on the **Add a New Value** tab.



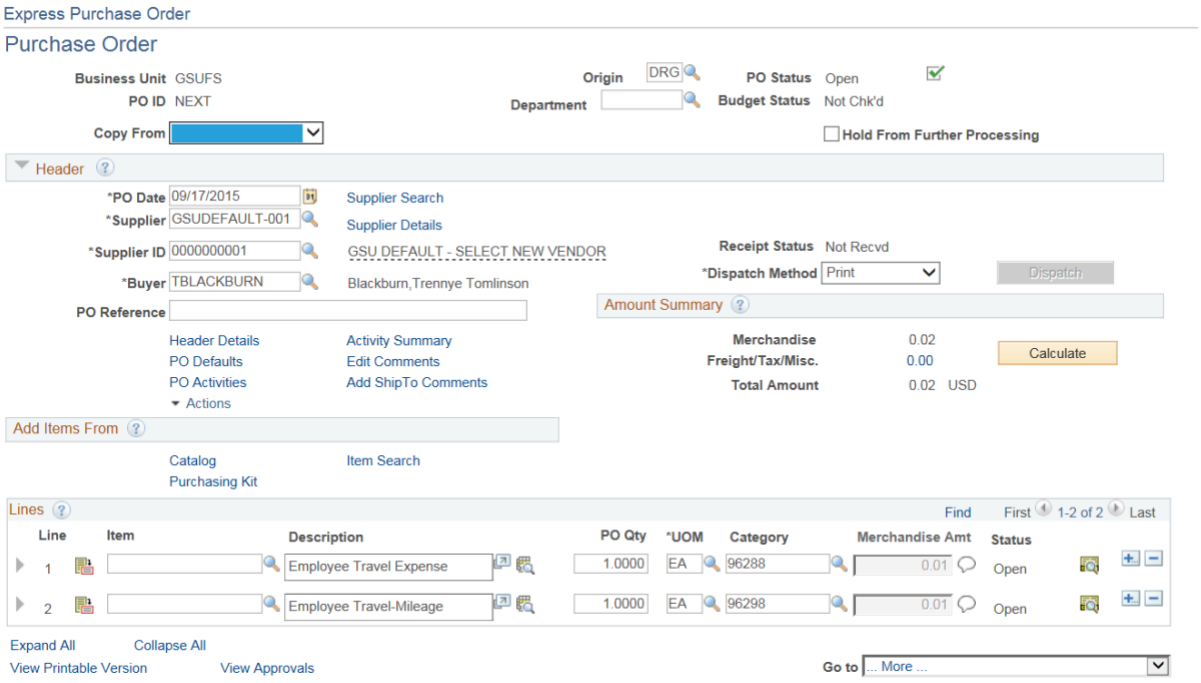
Click on the drop down arrow next to the **Copy From** field and select **Purchase Order**.



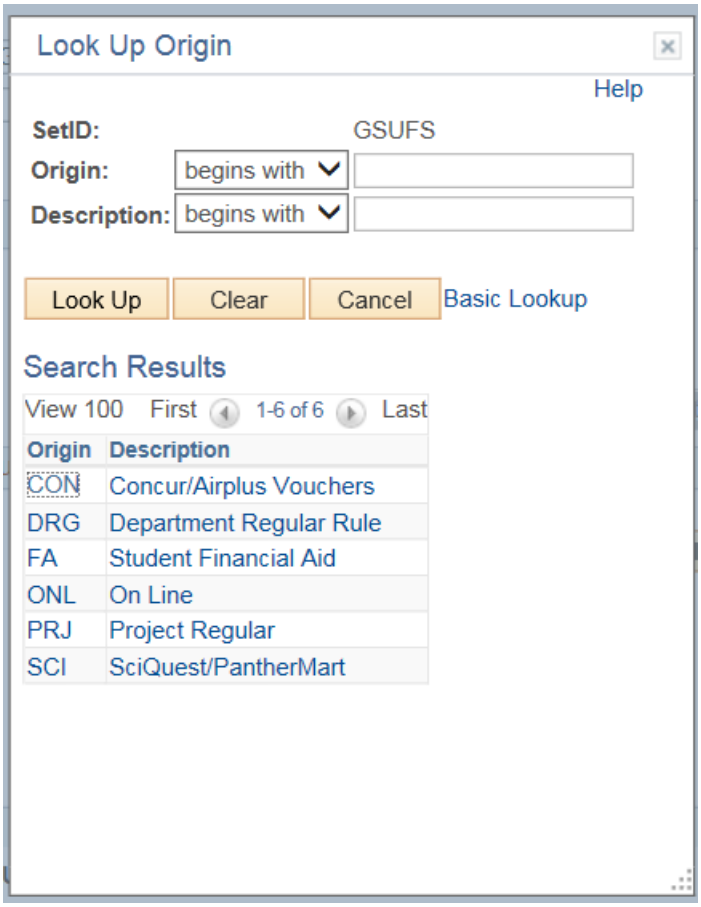
Type in the template name (**ETRAVEL**, STRAVEL, or CONSULTANT) in the PO ID field, click the magnifying glass, click the blue hyperlink, and click on Search. Then click the check box next to the template name and click **OK**.



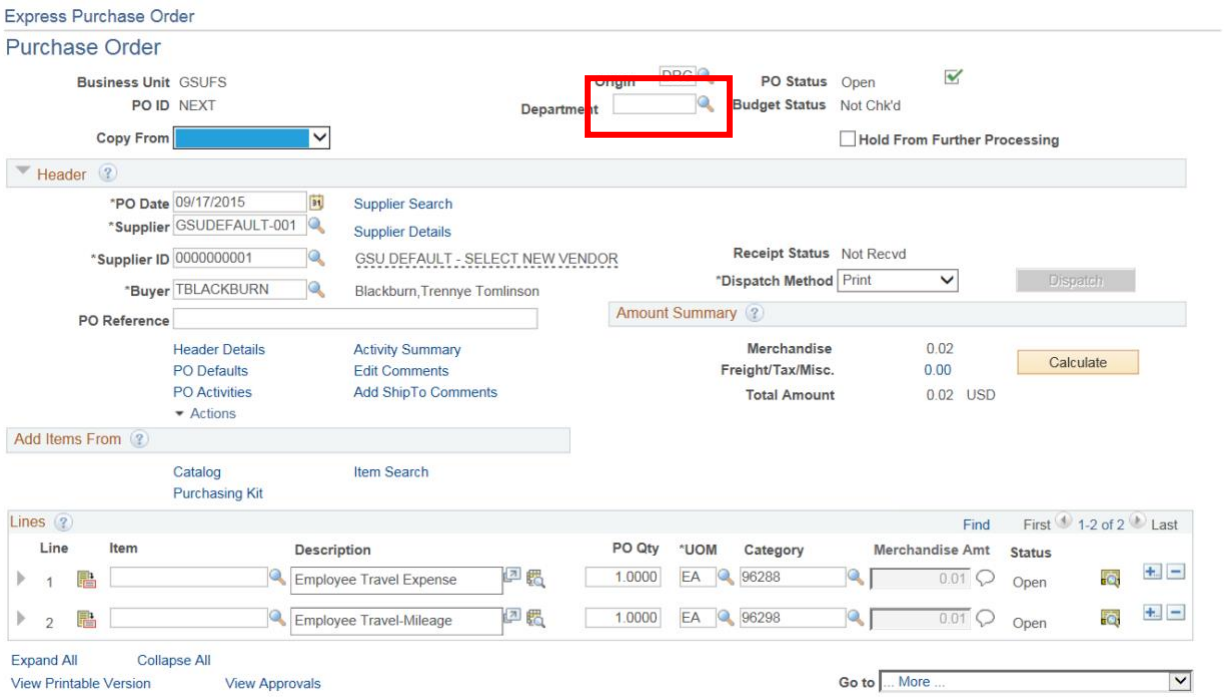
The system will redirect you to the main page. There is now information copied into the Express PO.



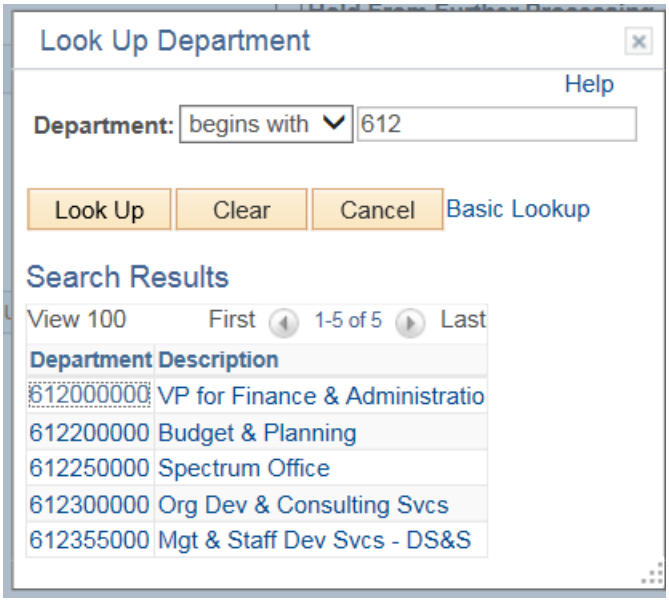
Please note that when the template is copied to a new Express PO, the information must be changed to reflect the new information required for your department. Update the Origin by clicking on the magnifying glass. This will determine the workflow routing for approval. If these expenditures are charged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



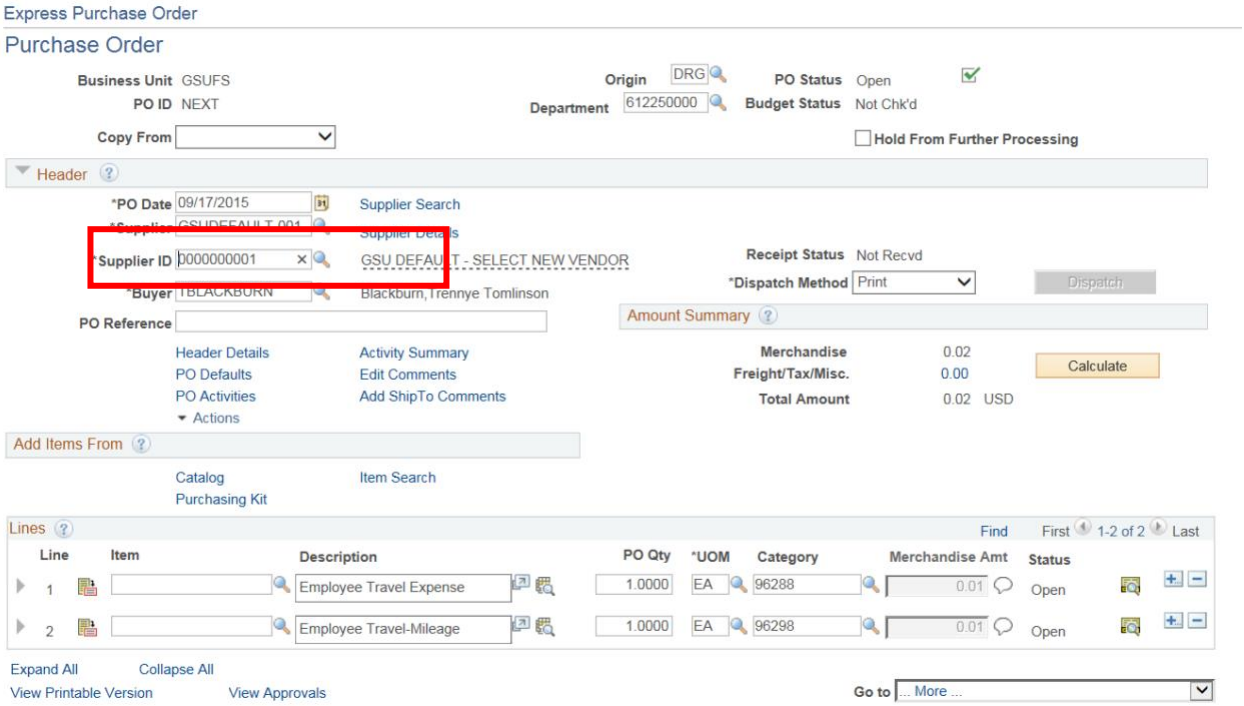
You will be redirected to the main page. Update the Department ID by clicking the magnifying glass.



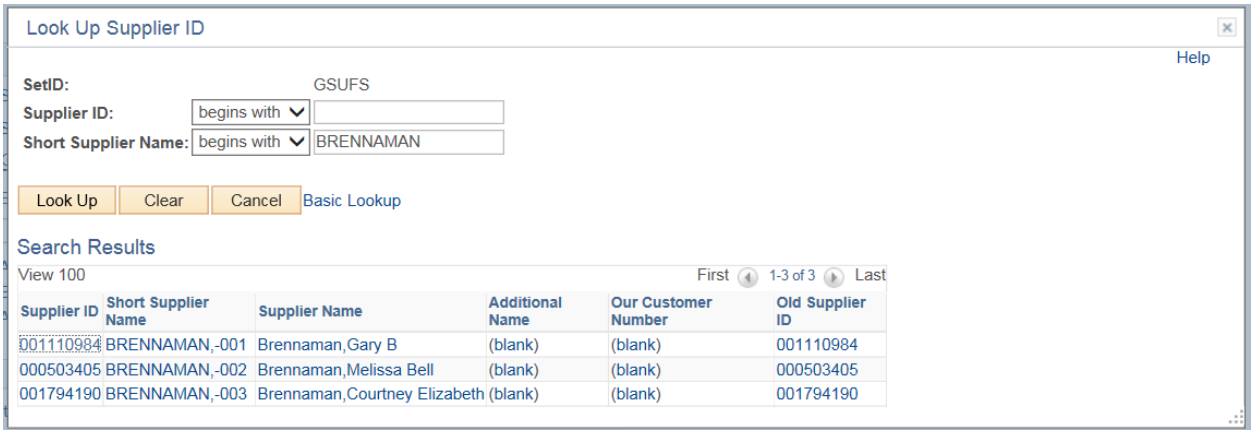
Enter the first few digits of your department ID and click the Look Up button. Select your department ID.



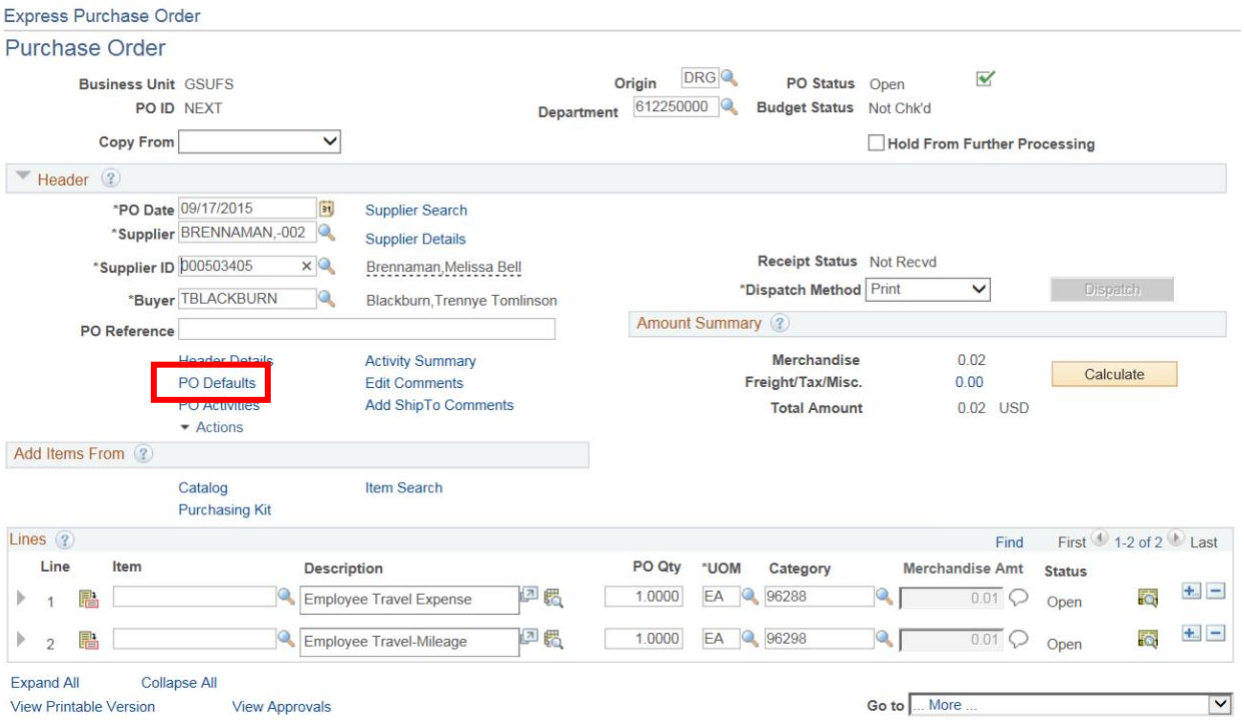
When you choose the Department ID from the Search list, you will be redirected to the main page. Change the Vendor ID to the name of the traveler in your department or to the name of the consultant or consulting company. Begin by clicking on the magnifying glass next to the Vendor ID field.



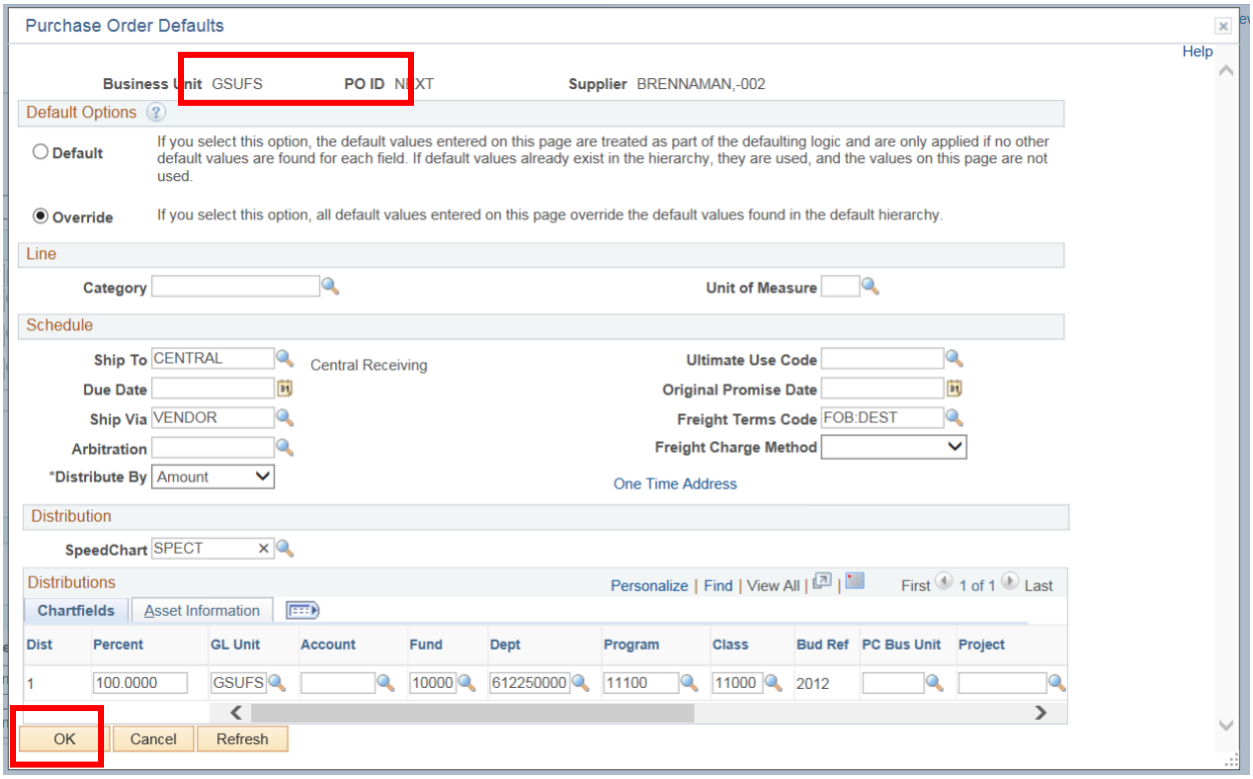
In the Short Vendor Name field, enter the traveler's last name or if you are issuing a consultant PO, enter the first few letters of the company name and click the Look Up button. Click your selection from the Search list.



The Express Purchase Order Main Page is displayed.

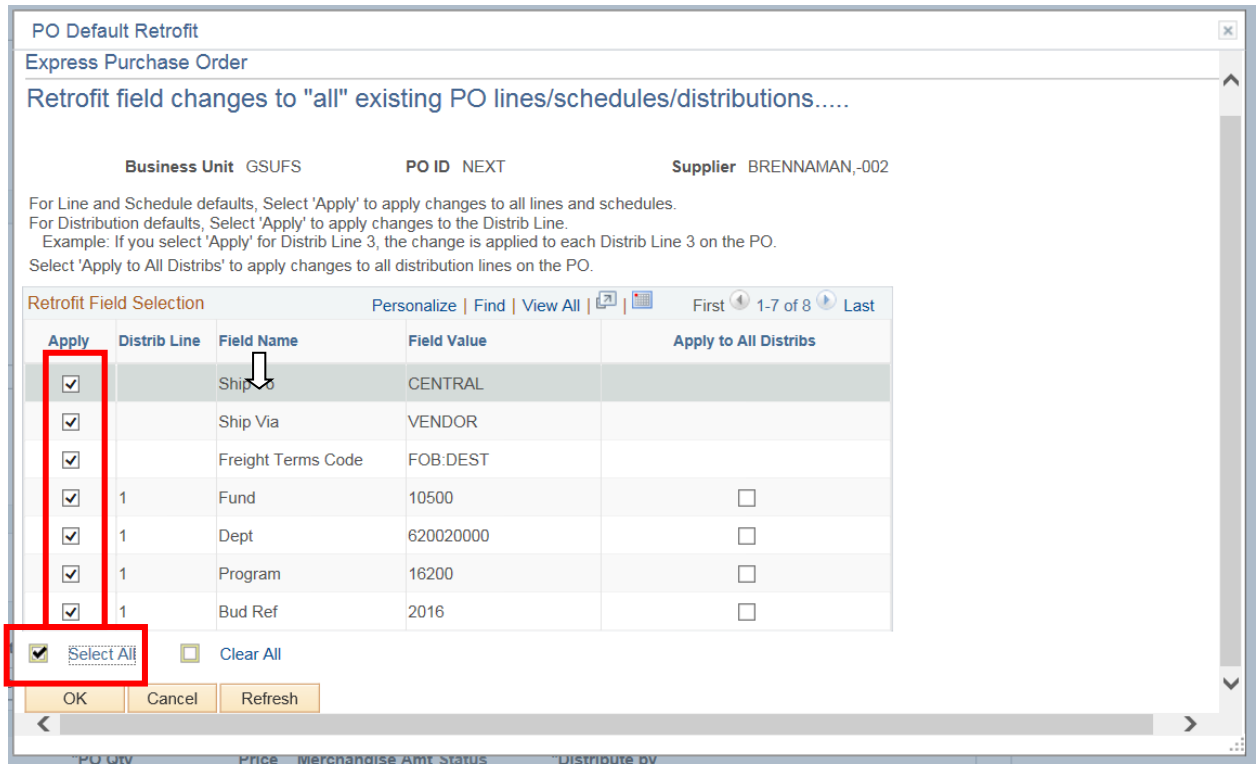


Click on the PO Defaults link and update the Speedchart information.

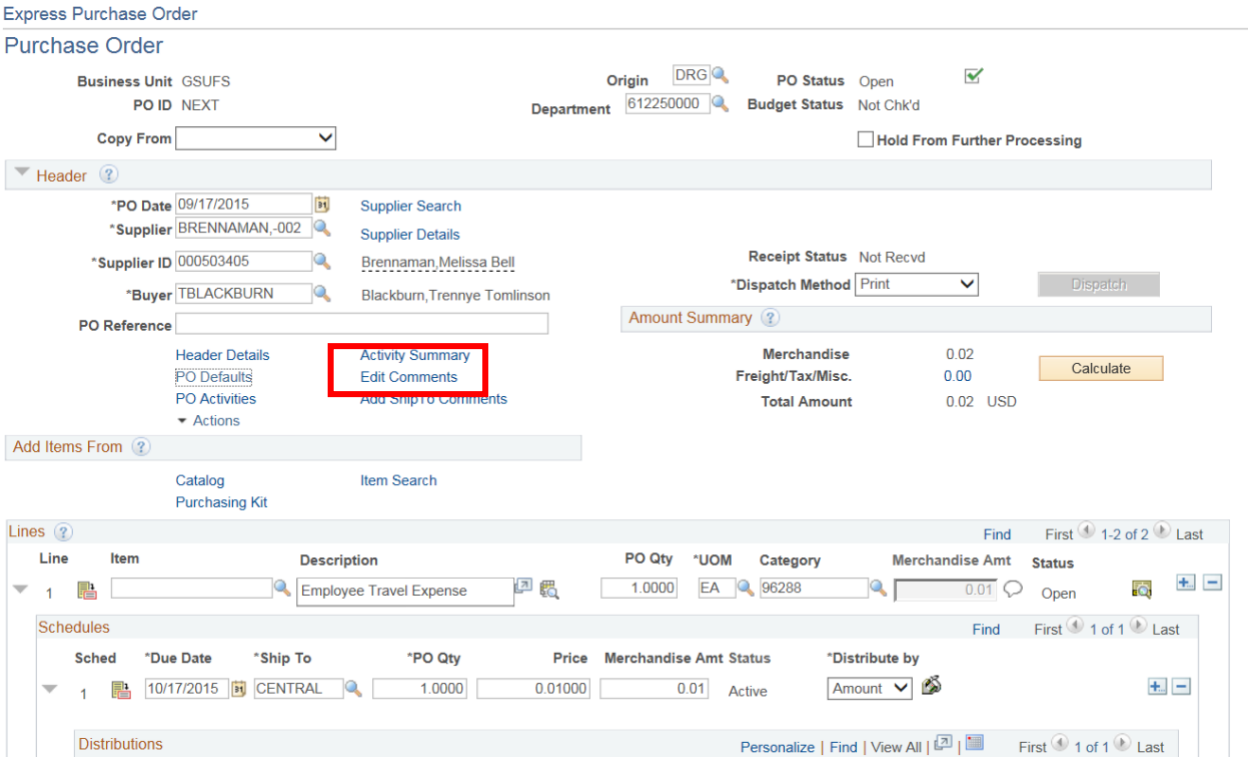


The system returns you to the PO Defaults page and your information will populate the Distribution field. Scroll to the bottom of the page and click OK.

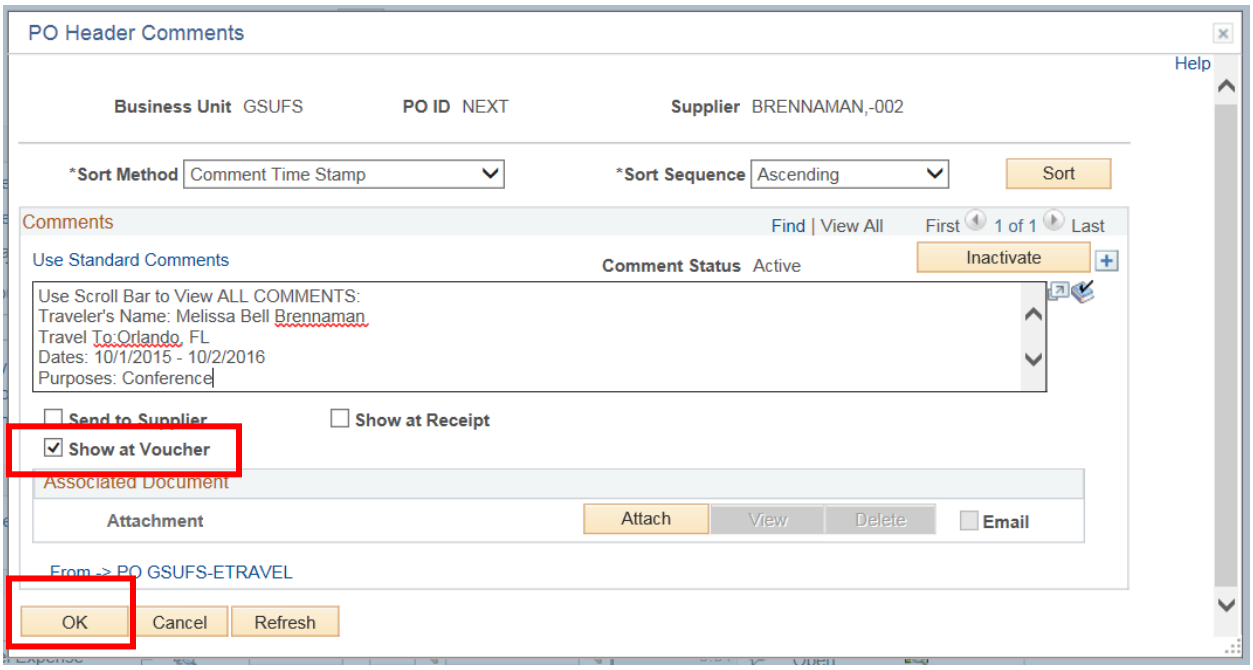
Any changes that you make on the PO Defaults page will cause the "Retrofit field changes" page to appear. Click on the '**Select All**' link. You must click this Select All link to change the default chartfield values on the template to your speedchart values. Notice when you click on this link, all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



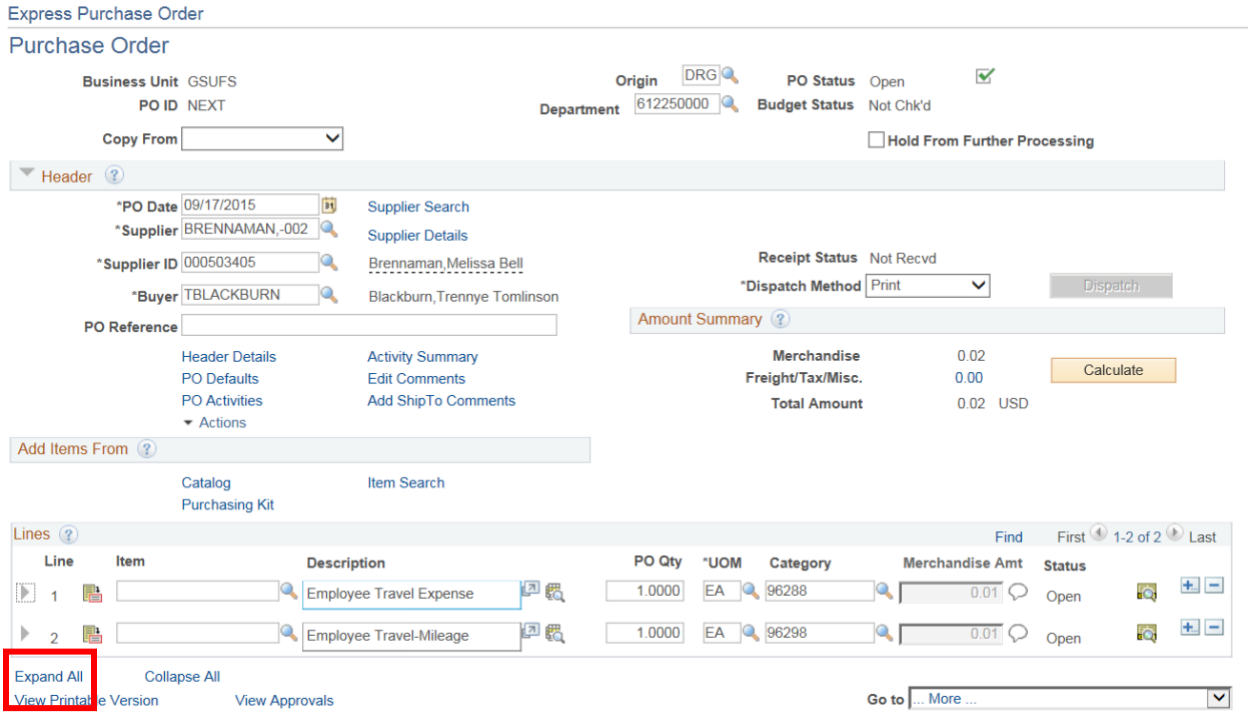
The system will return you to the main page of the Express PO. To access the template comments for the Travel PO and the Consultant PO, click the Edit Comments link.



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
Help
Business Unit GSUFS
PO ID NEXT
Supplier BRENNAMAN,-002
*Sort Method Comment Time Stamp
*Sort Sequence Ascending
Sort
Comments
Find | View All
First 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.



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