



## **ASCENDER - Approve and Receive Purchase Orders**



## Table of Contents

<b>ASCENDER - Approve and Receive Purchase Orders</b>	.....	i
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After the [Set up Purchasing Options and Permissions](#), [Manage Purchasing Approval Workflows](#), and [Perform Requisition Maintenance](#) processes are addressed, use the following steps to approve and receive purchase orders in the Purchasing application.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the [ASCENDER Business Overview guide](#).



Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

## Approve Requisitions and Print PO's

### 1. Approve a requisition.

#### Approve a requisition

[Purchasing > Maintenance > Approve Requisition](#)

Only users who have permission to approve requisitions can access the Approve Requisitions page. This page allows approvers to:

- Approve or disapprove individual requisition items.
- Approve or disapprove the entire requisition.
- Return the requisitions and/or line items to the originator for additional editing.

If you are the final approver, the vendor and account codes must be completed before the requisition is approved.

If you want another individual to review the requisition before you review it, you can insert an approver prior to your name.

If you want another individual to approve the requisition after you, you can add an approver after your name. Click **Path** to add approvers to the approval path.

<b>Retrieve an existing record.</b>	<b>Requisition Nbr</b>	Type the six-digit requisition number to be retrieved, if known. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.
		Click <b>Retrieve</b> . If the requisition number is not known, click <a href="#">Directory</a> .



The selected requisition is displayed. Review the requisition data and make changes as needed. Otherwise, use the following steps to approve, skip, or return a requisition.

**Note:** If **Reset Approval Path Purchasing** is selected on the [Finance > Tables > District Finance Options > Finance Options](#) page, any changes will cause the requisition to be returned to the originator for resubmission.

<b>Approve</b>	Click to approve the requisition and forward the requisition to the next approver in the approval path. <b>Note:</b> An error message is displayed when approving a requisition that contains a line item without an account code. The originator can submit a requisition without an account code, but a requisition cannot be approved without an account code. A message is displayed indicating that the approval is completed. Click <b>OK</b> . If the final approver approves the requisition, the requisition is converted to a purchase order and the following message is displayed.
<b>Skip</b>	Click to continue to the next requisition without taking action on the currently displayed requisition.
<b>Return</b>	Click to disapprove the complete requisition and return the requisition to the originator. If there are changes to the requisition, a pop-window with the requisition details is displayed prompting you to verify and continue. If there are no changes, a pop-window is displayed prompting you to continue. <ul style="list-style-type: none"> <li>◦ Click <b>Yes</b> to continue. A message is displayed indicating that the requisition was returned. Click <b>OK</b>.</li> <li>◦ Click <b>No</b> to return to the Approve Requisition page without returning the requisition. The originator can edit the returned requisition and resubmit it.</li> </ul> Click <b>Comments</b> to provide notes to the originator about the return reason. If there are changes to the requisition, a pop-window with the requisition details is displayed prompting you to verify and continue. Click <b>Yes</b> to continue. Otherwise, click <b>No</b> .

## 2. Print purchase orders

### Print purchase orders

[Purchasing > Reports > Purchase Order Reports > REQ1450 - Print Purchase Orders](#)

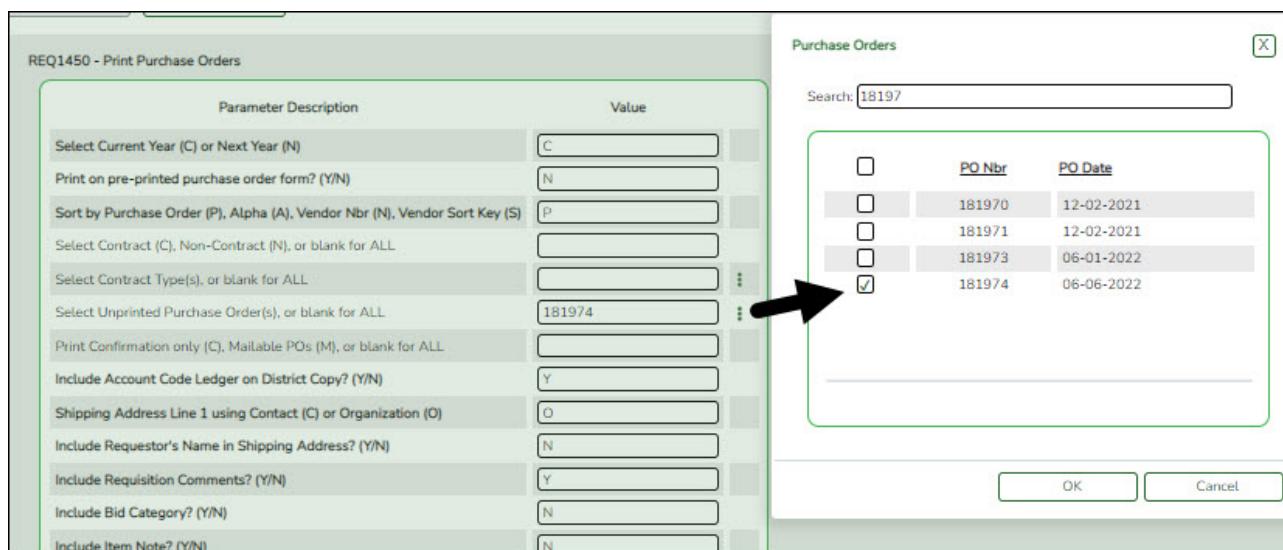
This report provides an automated means of printing purchase orders to send to vendors.

- Click **PO Signature** to select a signature to be displayed on the purchase order.
- Click **Contract** to display contract formats. If purchase orders did not correctly print, use the [REQ1500 - Reprint Purchase Orders](#) page to reprint the purchase orders.

**Notes:**

- Even if you do not actually print the purchase order, you must click  to register the purchase order.
- The vendor name is not printed on the purchase order if a DBA name exists for the vendor on the [Finance > Maintenance > Vendor Information > Vendor Name/Address](#) tab.

Complete the necessary report parameters.



Parameter Description	Value
Select Current Year (C) or Next Year (N)	C
Print on pre-printed purchase order form? (Y/N)	N
Sort by Purchase Order (P), Alpha (A), Vendor Nbr (N), Vendor Sort Key (S)	P
Select Contract (C), Non-Contract (N), or blank for ALL	
Select Contract Type(s), or blank for ALL	
Select Unprinted Purchase Order(s), or blank for ALL	181974
Print Confirmation only (C), Mailable POs (M), or blank for ALL	
Include Account Code Ledger on District Copy? (Y/N)	Y
Shipping Address Line 1 using Contact (C) or Organization (O)	O
Include Requestor's Name in Shipping Address? (Y/N)	N
Include Requisition Comments? (Y/N)	Y
Include Bid Category? (Y/N)	N
Include Item Note? (Y/N)	N

Purchase Orders

Search: 18197

	PO Nbr	PO Date
<input type="checkbox"/>	181970	12-02-2021
<input type="checkbox"/>	181971	12-02-2021
<input type="checkbox"/>	181973	06-01-2022
<input checked="" type="checkbox"/>	181974	06-06-2022

**OK** **Cancel**

Generate the report.

The selected purchase order(s) is displayed.



**IMPORTANT:** You must click  to register the purchase orders even if you do not actually print them.

Vendors with No E-mail  Vendors with E-mail  All Vendors**Texas ISD**

1715 MAIN STREET ALAMO CITY, TX. 46119-4521  
 Phone: ( 555 ) 675-6338 Fax: ( 555 ) 675-7848

S 750 School  
 H T 355 W FE 117  
 I O TEXAS CITY, TX 54611  
 P

V J  
 E 5  
 N A  
 D  
 O  
 R

P.O. NUMBER 181974  
 ATTACHMENTS N  
 P.O. DATE 06-06-2022  
 DELIVER BY 05-02-2022  
 REQ NBR 014000  
 VENDOR NBR 37586  
 REF NBR  
 BID NBR  
 FEDERAL ID NBR 51-9128683  
 VENDOR NOTE

Page: 1 of 1

vendor phone: (555) 271-2277

SEQ	QTY	UNIT	CATALOG NBR	DESCRIPTION	UNIT PRICE	DISCOUNT	FREIGHT	TOTAL PRICE
001	6.00	RE	888	123	10.00000	.00	.00	60.00

TOTAL P.O. \$60.00

ORIGINATOR	DATE	REQUESTOR	DATE	APPROVER	DATE
	05-02-2022	A	05-02-2022		06-06-2022

APPROVER	DATE	APPROVER	DATE	RECEIVED BY	DATE
	06-06-2022		08-17-2022		

First &lt; &gt; Last

Click **District** to view the district copy.

P.O.      E-mail       Vendors with No E-mail     Vendors with E-mail     All Vendors      PO Signature      Contract      Return to Reports

 First < > Last

**Texas ISD**  
 1715 MAIN STREET ALAMO CITY, TX. 78119-4521  
 Phone: (555) 675-6338      Fax: (555) 675-7848

S 750 School  
 H 355 W FE 117  
 I TEXAS CITY, TX 78119  
 P

V [REDACTED]  
 E  
 N  
 D  
 O  
 R

**P.O. NUMBER 181974**  
**ATTACHMENTS N**  
**P.O. DATE 06-06-2022**  
**DELIVER BY 05-02-2022**  
**REQ NBR 014000**  
**VENDOR NBR 37586**  
**REF NBR**  
**BID NBR**  
**FEDERAL ID NBR 51-9128683**  
**VENDOR NOTE**

**Page: 1 of 1**

SEQ	QTY	UNIT	CATALOG NBR	DESCRIPTION	UNIT PRICE	DISCOUNT	FREIGHT	TOTAL PRICE
001	6.00	RE	888	123	10.00000	.00	.00	60.00
Account Code			Encumbrance Amt.	Invoice Nbr	Expend Amount			
199-11-6411.00-[REDACTED]			20.00	[REDACTED]	[REDACTED]			
199-36-6411.00-[REDACTED]			15.00	[REDACTED]	[REDACTED]			
240-35-6239.00-[REDACTED]			20.00	[REDACTED]	[REDACTED]			
698-00-1264.00-[REDACTED]			5.00	[REDACTED]	[REDACTED]			
Total:			\$60.00					

Approval Path

Seq Nbr	Approver	Status	Date
0	Approved	06-06-2022	

TOTAL P.O. 60.00

ORIGINATOR	DATE	REQUESTOR	DATE	APPROVER	DATE
[REDACTED]	05-02-2022	[REDACTED]	05-02-2022	[REDACTED]	06-06-2022

APPROVER	DATE	APPROVER	DATE	RECEIVED BY	DATE
[REDACTED]	06-06-2022		08-17-2022		

First < > Last

A message is displayed at the bottom of the page indicating that the PO was successfully processed.



If the purchase orders did not correctly print, use the [REQ1500 - Reprint Purchase Orders](#) report to reprint.

## Receive PO's

1. Receive purchase orders.

## Receive purchase orders

Purchasing > Maintenance > Receiving > Requisition

This page is used to receive purchased goods/services. Use the packing slip to accurately update the receiving details.

Only requisitions for which you are the originator are displayed. Receiving is performed by the requisition number within the purchase order number. Purchase orders are displayed in the summary section, and associated requisitions are displayed in the detail section. Purchase orders created in the current accounting period can be received in the next accounting period.

If **Create Receiving Payables** is selected on the District Administration > Options > Purchasing/Warehouse page, payable transactions are automatically created on the [Finance > Maintenance > Pending Payables](#) page.

Under **Retrieval Options**:

<b>Retrieve an existing record.</b>	<b>Purchase Order Nbr</b>	Type the purchase order number to be retrieved. If the PO number is numeric, leading zeros are not required.
	<b>Requisition Nbr</b>	Type the requisition number to be retrieved. If the requisition number is numeric, leading zeros are not required.
	Click <b>Retrieve</b> . If the purchase order or requisition number is not known, click <b>Directory</b> .	
	<b>Notes:</b> The following receiving options selected on the <a href="#">District Administration &gt; Options &gt; Purchasing/Warehouse</a> page determine how information is displayed as well as if certain requisition items can be received on this page.	
	If <b>Use Blind Receiving</b> is selected, order quantities are not shown on this page.	
	If <b>Allow Partial Receiving</b> is not selected, only complete requisition items can be received.	
	If <b>Allow Receiving Overage</b> is not selected, only the original item quantity ordered or less can be received.	

Under **Requisition Information**, the following requisition details are displayed:

- **PO Nbr**
- **PO Date**
- **Req Nbr**
- **Campus/Dept**
- **Originator**
- **Requestor**
- **Order For**
- **First Approver**
- **Vendor Nbr**
- **Sort Key/Vendor Name**
- **Reason**
- **Shipping Addr**
- **Work Order**
- **Reference Nbr**
- **Bid Category**

Under **Requisition Items**, the following requisition item details are displayed:

- **Item**
- **Catalog Number**
- **Description**
- **Quantity**
- **Received To Date**
- **Item Status**

Complete the receiving details for the requisition:

**Date Received** This field is automatically populated with the current date. You can edit the date to reflect the actual date that the items were received.

**Note:** The date is no longer per line item.

**Quantity Received** For each line item, type the number of items received.

**Note:** If a requisition contains line items generated by Finance when a purchase order is changed, payable check transactions can only be received, not created.

Click **Receive All** to receive all items in the requisition.

Click **Save** to update the requisition receiving details.