

ASCENDER - Approve and Receive Purchase Orders

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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.

Approve Requistions 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:

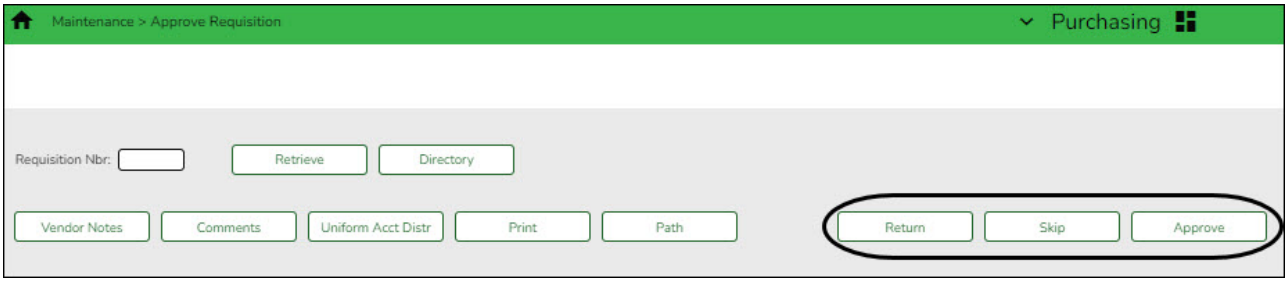
- Approve or disapprove individual requisition items.
- Approve or disapprove the entire requisition.
- Return the requisitions and/or line items to the originator for additional editing.

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.

Retrieve an existing record.	**Requisition Nbr**	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 **Retrieve**. If the requisition number is not known, click Directory.	



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.

Approve	Click to approve the requisition and forward the requisition to the next approver in the approval path. **Note**: 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 **OK**. If the final approver approves the requisition, the requisition is converted to a purchase order and the following message is displayed.
Skip	Click to continue to the next requisition without taking action on the currently displayed requisition.
Return	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. ∘ Click **Yes** to continue. A message is displayed indicating that the requisition was returned. Click **OK**. ∘ Click **No** to return to the Approve Requisition page without returning the requisition. The originator can edit the returned requisition and resubmit it. Click **Comments** 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 **Yes** to continue. Otherwise, click **No**.

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.

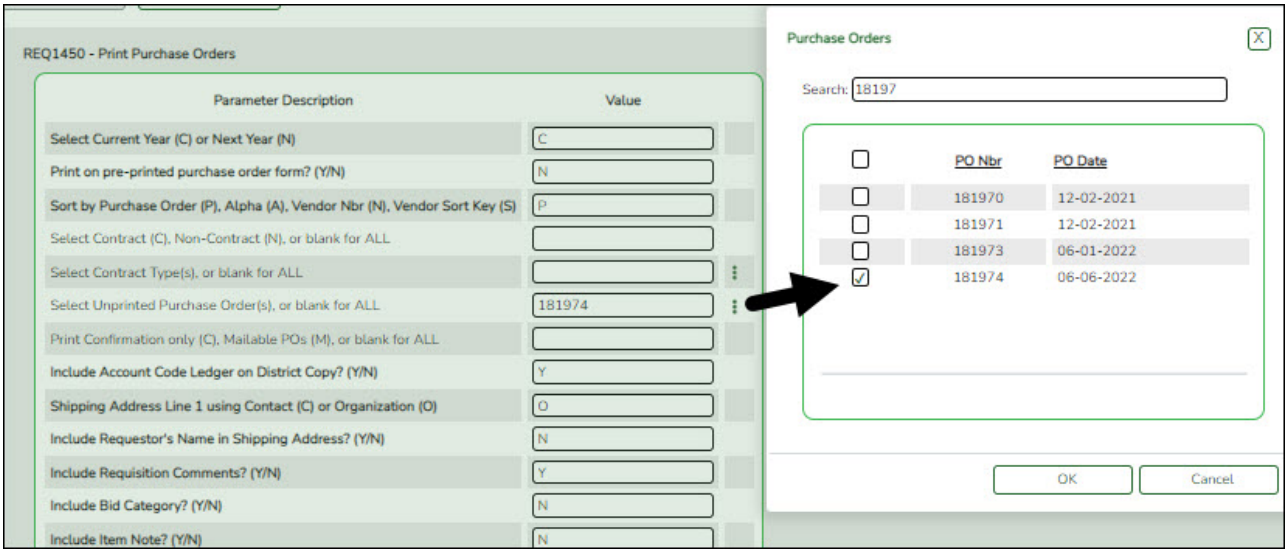
❑ Click **Contract** to display contract formats. If purchase orders did not correctly print, use the REQ1500 - Reprint Purchase Orders page to reprint the purchase orders.

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.

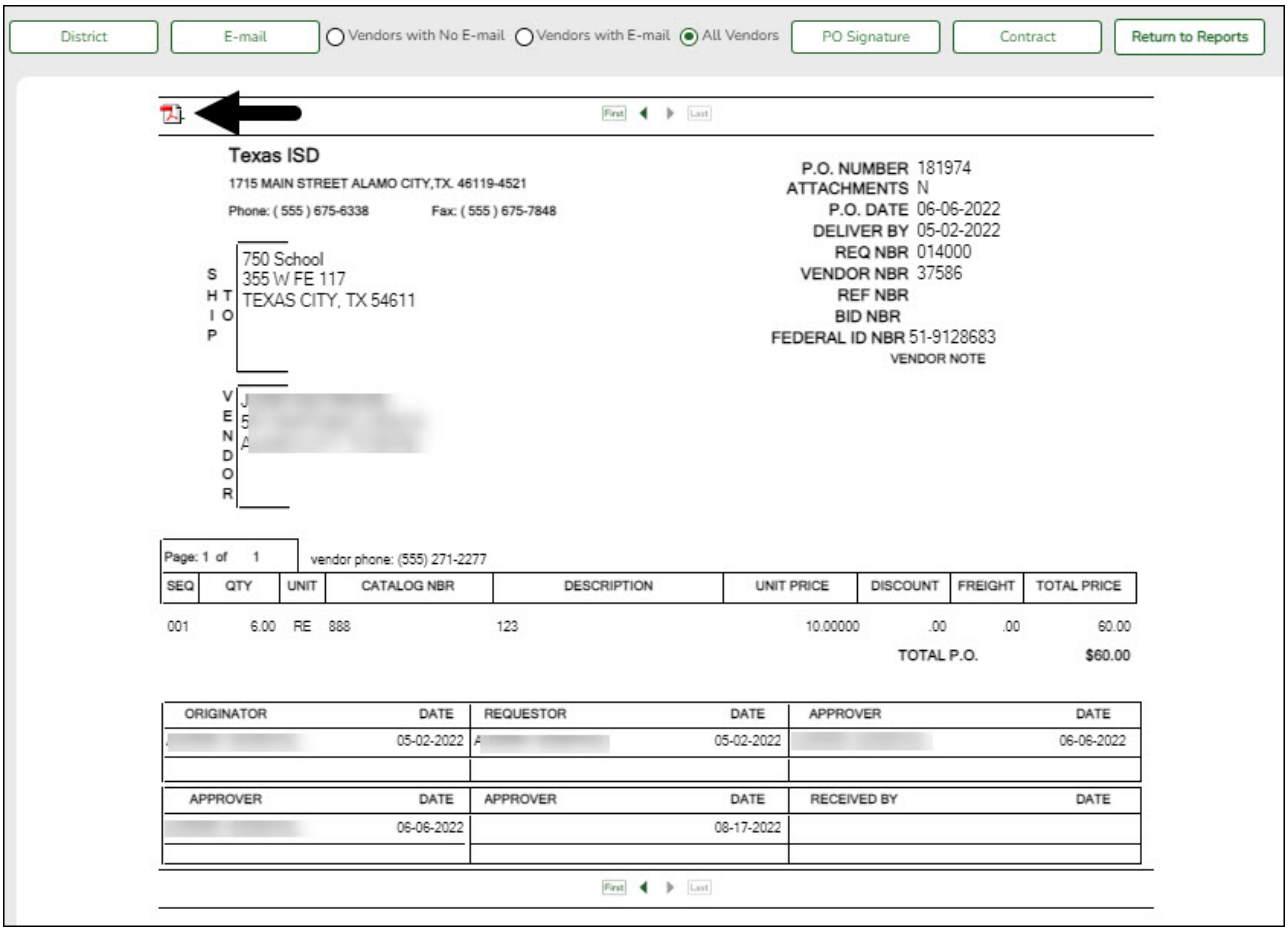
Complete the necessary report parameters.



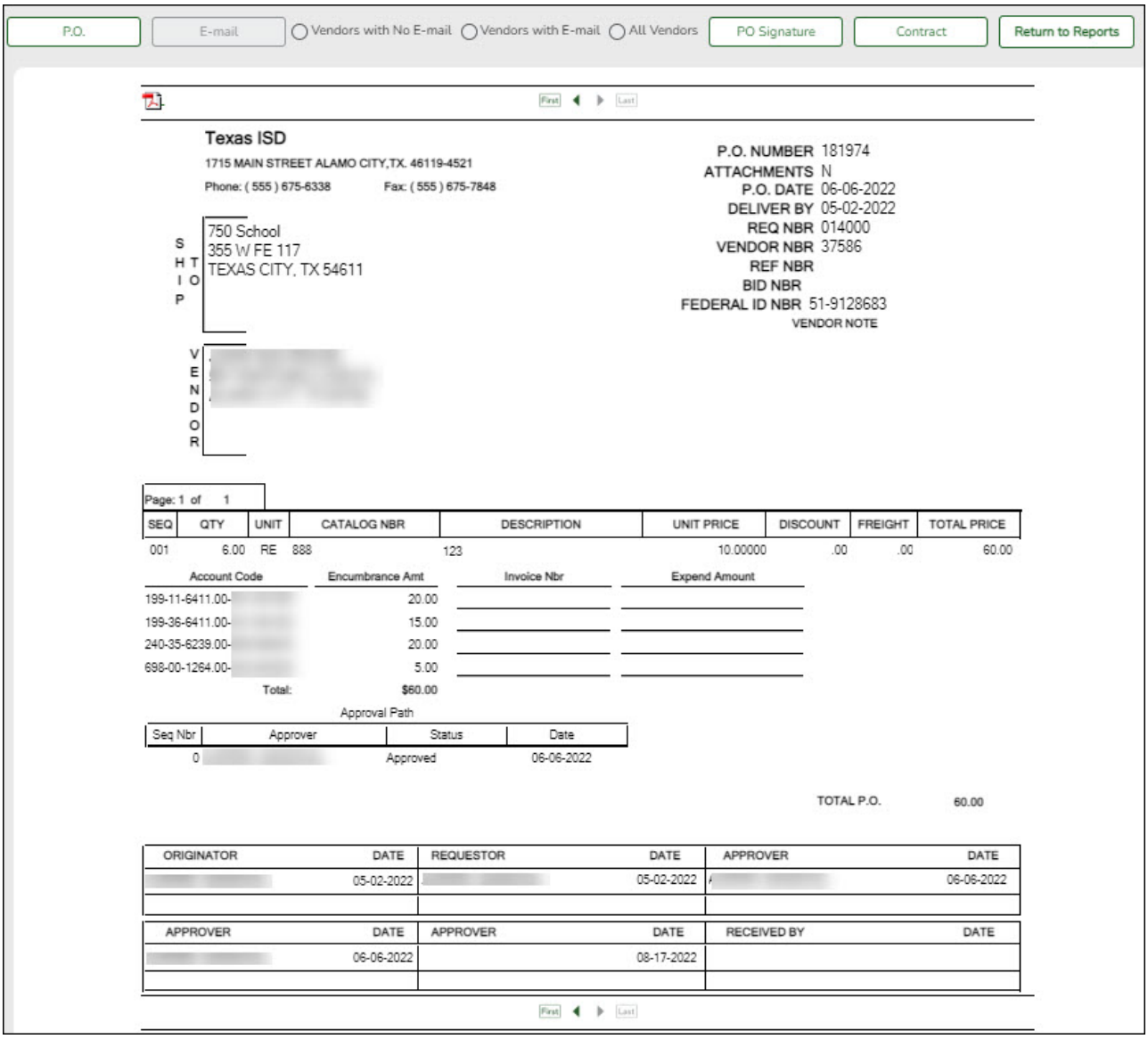
Generate the report.

The selected purchase order(s) is displayed.

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



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



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.

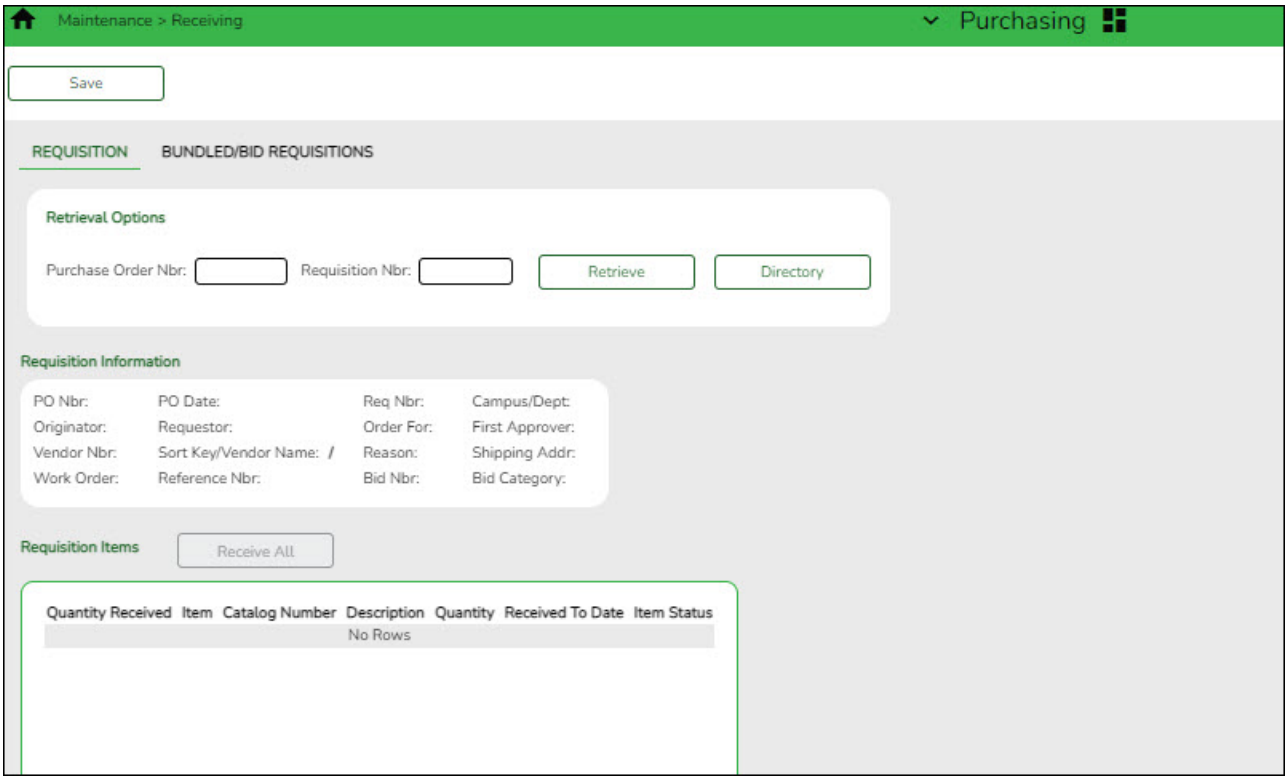
Receive purchase orders

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**:

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


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