Statewide Procurement User Group

March 30th, 2010
3:50 PM

Statewide Procurement User Group Agenda

Approval Route Discussion
Approval Route Work Flow
OG Cancel Date Edits
OP How to Enter with Edits, Print, & Commitment Inquiry
O4 How to Enter with Edits & Printing

Approval Route Discussion

Kay Mencl

Approval Route Workflow

Kay Mencl

E-mail Notification

- E-mail message will be sent to all approvers, at the same dollar level, when there is a document needing approval
  - Email Indicates
    - Document Number and Order type
    - Amount
    - Business Unit

E-mail Notification

From: kay.mckay@nebraska.gov [mailto:kay.mckay@nebraska.gov]
Sent: Friday, March 12, 2010 8:25 AM
To: Perez, Julie
Subject: Approval Required: 303261- OP Originator-MCKAY, DORENNE K

Your approval is required on PURCHASE ORDER 303261 - OP. The total dollar value of the OP requiring approval is 100.00. The business unit is 65025009. Click the link below to start the approval process.

Purchase Order Requisition Approval

Refer to the Training Guide on
How to Approve an Order

Approval Route Workflow

E-mail Notification

How To Approve

Approval Required: 303270- OP Originator-HEINRICHS, CONSTANCE

nis.jdeadmin@nebraska.gov

Sent: Mon 3/15/2010 4:53 PM

To: Mencl, Kay

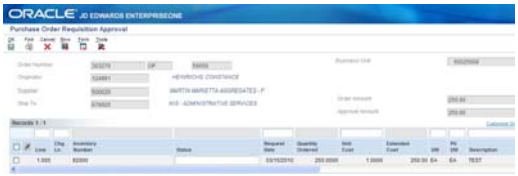
Your approval is required on PURCHASE ORDER 303270 - OP. The total dollar value of the OP requiring approval is 250.00. The business unit is 65025009. Click the link below to start the approval process.

Purchase Order Requisition Approval

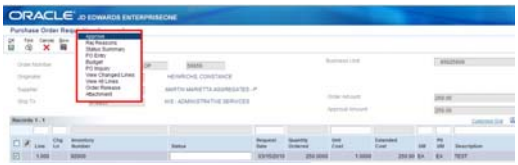
Approval Route Workflow

At the prompt enter User ID and Password

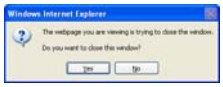
Approval Route Workflow



Approval Route Workflow



Approval Route Workflow



Click on Yes

Approval Route Workflow

E-mail Notification

Email message will be sent to the originator when the

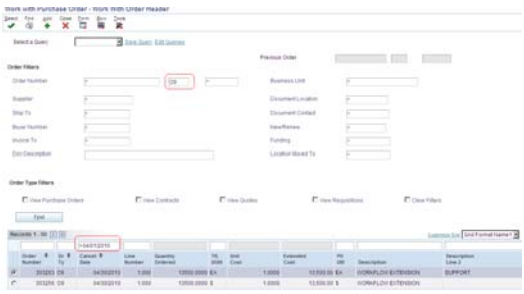
OG Cancel Date Edits

Sharon Zimmerman

OG Cancel Date Edits

- For Purchase Orders Generated from Contracts follow this process to remove cancel dates.
  - OG
  - OU
  - ZG
  - O9
  - O6

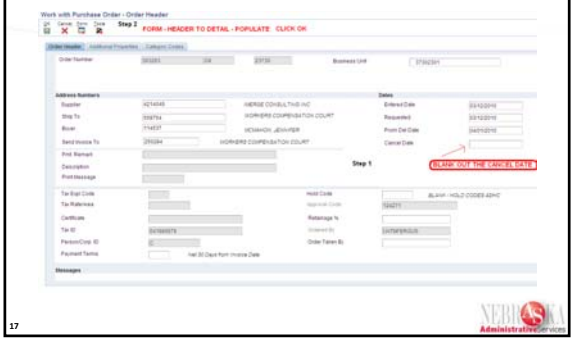
OG Cancel Date Edits



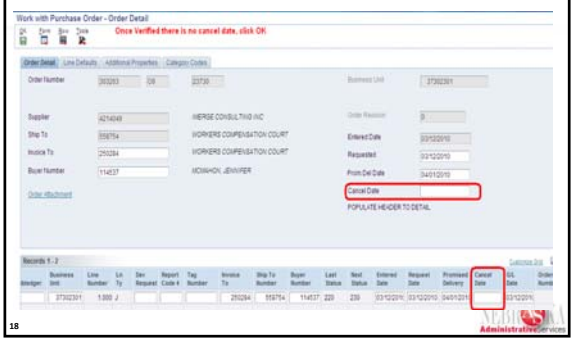
OG Cancel Date Edits

Choose the line/order number you want to edit and click Select.

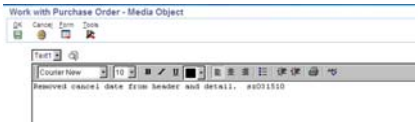
OG Cancel Date Edits



OG Cancel Date Edits



OG Cancel Date Edits



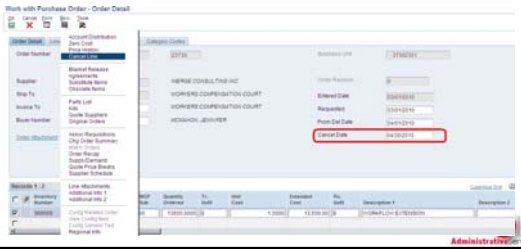
Click OK

OG Cancel Date Edits

What happens if Training Guides are not followed?

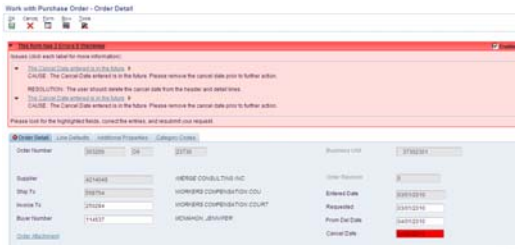
OG Cancel Date Edits

In this example, Row – Cancel Line was completed without first removing the cancel date.



OG Cancel Date Edits

At this point, cancel out and follow the training guide.



OG Cancel Date Edits

OG Cancel Date Edits

When this error occurs, click cancel and follow the training guide.

OP How to Enter with Edits, Print, & Commitment Inquiry

Sharon Zimmerman

Follow Training Guide or Job Aid

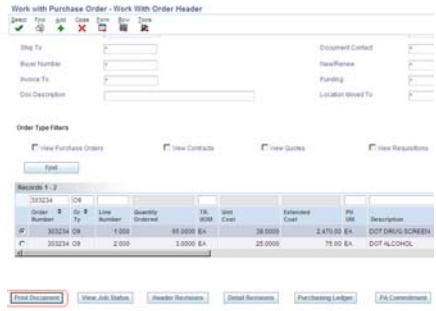
1. Training Guide
2. Job Aid

The NEW Print Button

1. If Purchase Order is at a 280 Status(Approved)
    1. Click the Print Purchase Order button
       see next slide for picture
2. If Purchase Order has not been approved:
    1. Print via the menu - same process as in 8.10
    2. The Purchase Order will have a watermark
       that says “Not Approved” (Coming Soon)

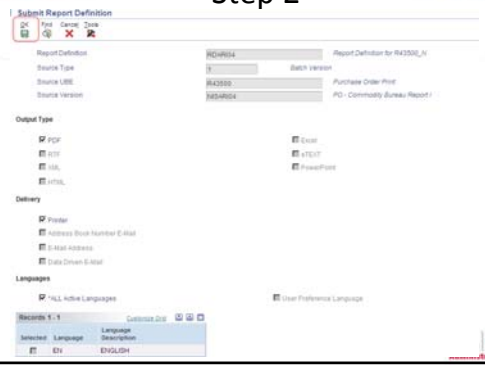
OP How to Enter with Edits, Print, & Commitment Inquiry

Step 1



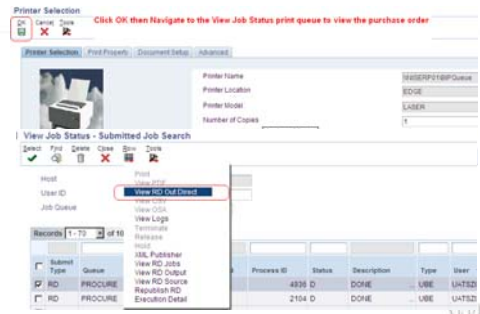
OP How to Enter with Edits, Print, & Commitment Inquiry

Step 2



OP How to Enter with Edits, Print, & Commitment Inquiry

Step 3 and 4



O4 How to Enter with Edits & Printing

Sharon Zimmerman

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O4 how to Enter with Edits and Printing

Follow Training Guide or Job Aid

1. Training Guide
2. Job Aid

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