



Comments and Attachments

Requisition comments and attachments enable requesters to communicate supplemental information and requirements to approvers and other Core-CT users. Comments and attachments are always tied to the requisition. Core-CT 9.1 added functionality for allowing multiple comments and attachments to the requisition header as well as to each line of the requisition.

Header Comments and Attachments

Header comments and attachments are added on the **Checkout** page after the requester has already added items and services to the requisition. These are typically used to relay information regarding the entire requisition and all the items on a multiple line requisition.

The screenshot shows the 'Edit Requisition' interface. At the top, it says 'Checkout for Requisition ID 0000038130' with a search bar and navigation icons. Below this, there's a 'Requisition Summary' section. On the left, it lists 'Business Unit: MHAM1 Mental Health & Addiction Serv', 'Requisition Name: Host Application-OOC', 'Requester: ChaffeeP DAS-Chaffee Paula L.', and 'Currency: USD'. On the right, it shows 'Priority: Medium', 'Requisition Type: ITD-10', 'Dispatch Method: Email', 'Card Number', 'Expiration Date', 'Budget Check Status: Not Checked', and 'Use Procurement Card: No'. A red box highlights the 'Header Comments' checkbox, which is currently unchecked. There is also a 'Preview Approvals' button and a 'Justification Comments' section at the bottom.

Approval Justification

The requester can select to have comments display on the **Requisition Approval** page. Approvers can view comments without having to open the requisition.

More Comments

Clicking this link opens the **Header Comments** page. From this page the requester can:

- Select Standard Comments
- Add Attachments
- Add multiple comment lines.



Use Standard Comments

ePro Requesters can use existing **Standard Comments**. Click the **Use Standard Comments** link to display the **Standard Comments** page.



Click **Search** to display all available comments.

Click the **Select** checkbox next to any comment to add it to the requisition. The slide bar should move to **Yes**. Then click the **Done** button.

The **Header Comments** page displays the standard comment. Click **Done** to save the comment.

Add Attachments

ePro requesters can add multiple header and line attachments. It is recommended to add multiple attachments as one per comment.

Cancel Done

Requisition Header Comments and Attachments

Comments + -

Use Standard Comments

Comment Text Rec'd date of 1/01/20XX is 45 days outside of CORE.

Send to Supplier No

Show at Receipt No

Show at Voucher No

Add Attachment

Attachments remain permanently associated with the requisition within Core-CT. Attachments can be sourced with the Purchase Orders if the requester selects the Send to Supplier option. Attachments are included when a PO is dispatched via email. Attachments are not included for POs dispatched via Print, Fax, and Electronic Data Exchange (EDX).

Procedure

Navigation: Nav Bar > Menu > Core- CT Financials > eProcurement > Create Requisition > Checkout
OR Fluid Dashboard: Core-CT Financials > eProcurement > Create Requisition > Checkout

Create Requisition

Continue Shopping Save Submit

Checkout

Requisition Defaults

Order Total 900.00 USD

Requisition Summary

Business Unit DEPM1 Dept of Energy & Environ Prot

Requisition Name BIT DEP Laptops

Requester 565977 DEP-Norris Sean K

Currency USD

Priority Medium

Requisition Type ITD-10

Dispatch Method Email

Obligation Amount

Card Number

Expiration Date

Use Procurement Card No

Justification Comments


Requisition Lines Overview

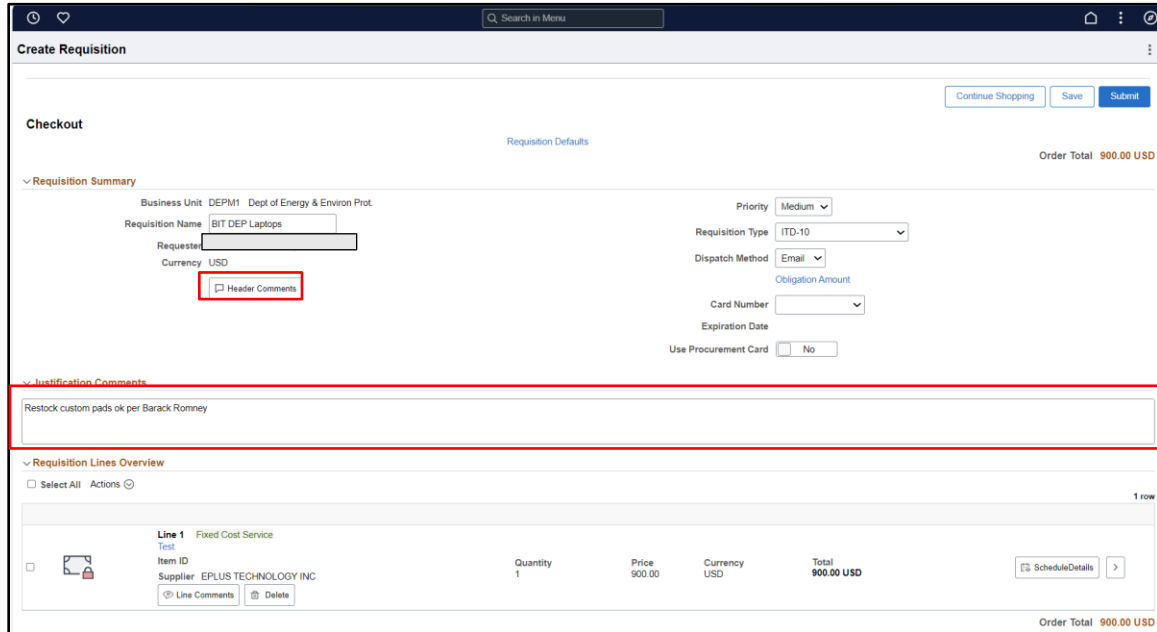
Select All Actions

Line	Item ID	Supplier	Quantity	Price	Currency	Total
Line 1	Test	EPLUS TECHNOLOGY INC	1	900.00	USD	900.00 USD

ScheduleDetails >

Order Total 900.00 USD

Step	Action
1.	Enter Restock custom pads ok per Barack Romney into the Justification Comments field.
2.	Commenting this in the Justification Comments field will have the comment display on the Requisition Approval page. 



Create Requisition

Checkout Continue Shopping Save Submit

Requisition Defaults Order Total 900.00 USD

Requisition Summary

Business Unit: DEPM1 Dept of Energy & Environ Prot
 Requisition Name: BIT DEP Laptops
 Requester: [Redacted]
 Currency: USD
 Priority: Medium
 Requisition Type: ITD-10
 Dispatch Method: Email
 Obligation Amount: [Redacted]
 Card Number: [Redacted]
 Expiration Date: [Redacted]
 Use Procurement Card: No

Justification Comments

Restock custom pads ok per Barack Romney

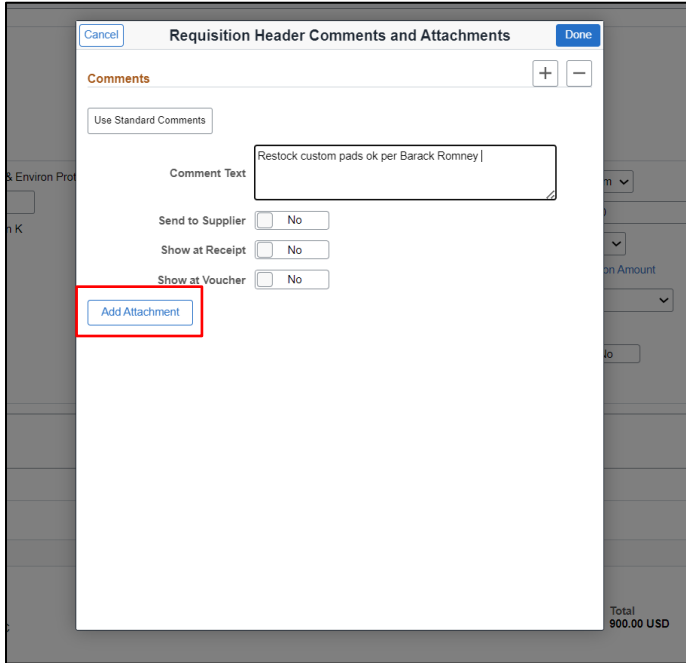
Requisition Lines Overview

Select All Actions

Line	Item ID	Quantity	Price	Currency	Total	Actions
Line 1	Fixed Cost Service	1	900.00	USD	900.00 USD	ScheduleDetails

Order Total 900.00 USD

Step	Action
4.	Click the Header Comments link. 



Step	Action
5.	<p>The Header Comments pop-out displays the entered comment as well as the following options:</p> <ul style="list-style-type: none"> - Use Standard Comments - Add Attachments - Add and delete comment rows
6.	<p>Click the Add a new row button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-left: 20px;">+</div>

Cancel **Requisition Header Comments and Attachments** Done

Comments + -

Use Standard Comments

Comment Text Restock custom pads ok per Barack Romney

Send to Supplier No

Show at Receipt No

Show at Voucher No

Add Attachment

Comments + -

Use Standard Comments

Comment Text

Send to Supplier No

Show at Receipt No

Show at Voucher No

Add Attachment

Step	Action
7.	Click the Use Standard Comments link.
	<div style="border: 1px solid gray; padding: 5px; display: inline-block;">Use Standard Comments</div>

Cancel **Standard Comments** Done

Search Criteria

Comment Type Q Search

Description Reset

Comment ID Q

Step	Action
8.	Click the Look up Comment Type magnifying glass.



Lookup	
Search for: Comment Type	
Search Criteria	
Search Results	
38 rows	
Standard Comment Type	Description
AAC	ELE Affirmative Action Comment
ASP	Ship as Soon as Possible
C24	Call 24 Hours Before Delivery
C48	Call 48 Hours Before Delivery
C72	Call 72 Hours Before Delivery
CHG	Change Order
CON	Confirming Order
CRC	Return Copy to Agency
DAS	DAS Email Invoicing
DEL	Delivery Comments/Instructions
ELE	Elevator Size Restrictions
EQUI	Equipment Inventory
EXP	Expedite
FYI	For Your Information
GF	Grant Funded
INT	Additional Instructions
LO	Letter Order Reference

Step	Action
9.	Click the DEL link to view delivery comments and instructions.

DEL


Cancel
Standard Comments
Done

Search Criteria

Comment Type

Description

Comment ID

Step	Action
10.	Click the Look up Comment ID button. 


Cancel
Lookup

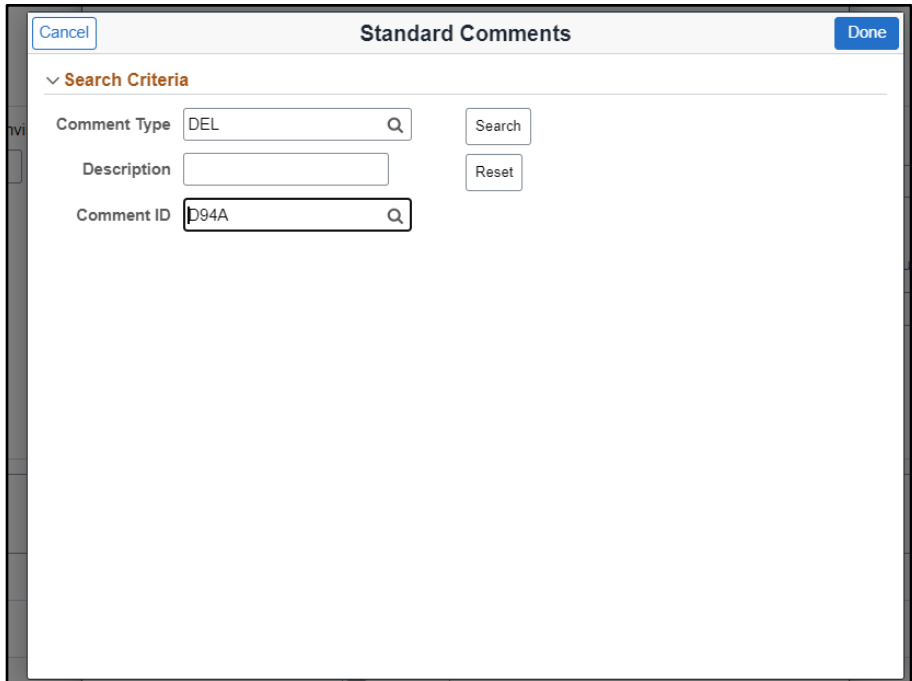
Search for: Comment ID

Search Criteria

Search Results

Standard Comment ID T1	Description T1
8333	Receiving Hours 8:30am-3:30pm
834A	Receiving Hours 8:30am-4pm
834B	Receiving Hours 8:30am-4pm
CAS	SHIP TO
CONT	CONTACT TO SCHEDULE SERVICE
D072	Receiving Hours 7am-2pm
D082	Receiving Hours 8am-2pm
D734	Loading Dock Hours 7:30-4pm
D823	Receiving Hours 8am-2:30pm
D833	Receiving Hours 8:30am-3pm
D83A	Receiving Hours 8am-3 pm
D83B	Deliver to DOC North Warehouse
D83C	Receiving Hours 8am-3pm
D83D	Loading Dock Hours 8am-3pm
D843	Receiving Hours 8am-4:30pm
D84A	Receiving Hours 8am - 4pm
D84B	Receiving Hours 8am-4pm

Step	Action
11.	Click the D94A link to select the Receive Hours 9am-12pm & 2-4pm comment. 



Standard Comments

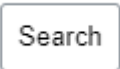
Cancel Done

Search Criteria

Comment Type DEL Search

Description Reset

Comment ID D94A Search

Step	Action
12.	Click the Done button. 

Cancel
Standard Comments
Done

▼ **Search Criteria**

Comment Type

Description

Comment ID

Standard Comments

Select No

Comment Type DEL

Comment ID D94A

Description Receive Hrs 9am-12pm & 2-4pm

Receive Hrs 9am-12pm & 2-4pm

Append To Comments Override Comments

Step	Action
13.	Click the Select sidebar. <div style="border: 1px solid gray; padding: 5px; margin-top: 5px; display: inline-block;"> Select <input checked="" type="checkbox"/> Yes </div>
14.	Use the Append to Comments checkbox to add the standard comment to an existing comment. Otherwise accept the default Override Comments .
15.	Click the Done button. <div style="margin-top: 5px; display: inline-block;"> <input type="button" value="Done"/> </div>

Cancel
Requisition Header Comments and Attachments
Done

Comments + -

Use Standard Comments

Comment Text

Send to Supplier No

Show at Receipt No

Show at Voucher No

Add Attachment

Comments + -

Use Standard Comments

Comment Text

Send to Supplier No

Show at Receipt No

Show at Voucher No

Add Attachment

Step	Action
16.	<p>The field populates with the standard comment.</p> <p>Click the Send to Supplier slide bar to display Yes, to have the comment print on the PO header.</p> <p style="text-align: center;">Send to Supplier <input checked="" type="checkbox"/> Yes <input type="checkbox"/></p>
17.	<p>Click the Done button to save the comments and close the Header Comments page.</p> <p style="text-align: center;"><input type="button" value="Done"/></p>

🕒
🔍 Search in Menu
🏠

Create Requisition

Continue Shopping Save Submit

Checkout Requisition Defaults

Order Total 900.00 USD

Business Unit DEPM1 Dept of Energy & Environ Prot.

Requisition Name

Requester 565977 DEP-Norris, Sean K

Currency USD

Header Comments

Priority

Requisition Type

Dispatch Method

Obligation Amount

Card Number

Expiration Date

Use Procurement Card No

Justification Comments

Step	Action
18.	The Review and Submit page does not openly display the header comments. Click the Header Comments link at any time to view the comments made.
19.	In this scenario the supplier requires that a copy of the quotation be sent with the PO. Click the Line Comments button.

Create Requisition

Checkout Requisition Defaults Order Total **900.00 USD**

Requisition Summary

Business Unit: DEPM1 Dept of Energy & Environ Prot. Requisition Name: <input type="text" value="BIT DEP Laptops"/> Requester: 565977 DEP-Norris,Sean K Currency: USD <input type="button" value="Header Comments"/>	Priority: <input type="text" value="Medium"/> Requisition Type: <input type="text" value="ITD-10"/> Dispatch Method: <input type="text" value="Email"/> Obligation Amount: Card Number: <input type="text"/> Expiration Date: Use Procurement Card: <input type="checkbox"/> No
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Justification Comments

Restock custom pads ok per Barack Romney

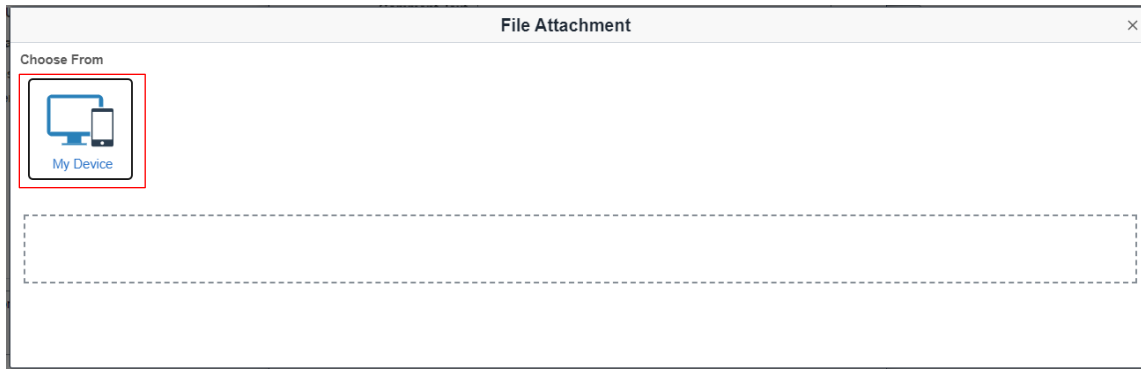
Requisition Lines Overview

Select All

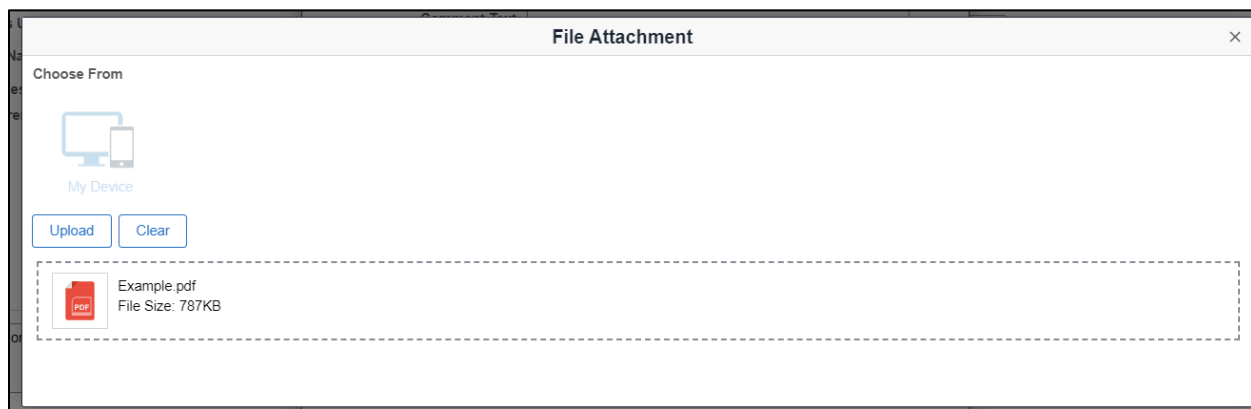
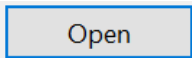
Line	Description	Quantity	Price	Currency	Total	Actions
1	Line 1 Fixed Cost Service Test Item ID Supplier: EPLUS TECHNOLOGY INC	1	900.00	USD	900.00 USD	<input type="button" value="Line Comments"/> <input type="button" value="Delete"/>

Order Total **900.00 USD**

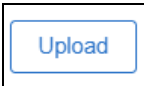
Step	Action
20.	The Line Comments page displays. The options on this page are consistent with those found on the Header Comments page. Click the Add Attachments button. <div style="border: 1px solid blue; padding: 5px; display: inline-block; margin: 10px 0;">Add Attachment</div>
21.	Click the My Device... button to locate the quotation file.



Step	Action
22.	Click any file you need to upload.
23.	Click the Open button.



Step	Action
24.	Click the Upload button.



Cancel
Requisition Line Comments and Attachments
Done

Comments + -

Use Standard Comments

Comment Text: <<Start Date:2024-05-10>>

Send to Supplier No

Show at Receipt No


Show at Voucher No

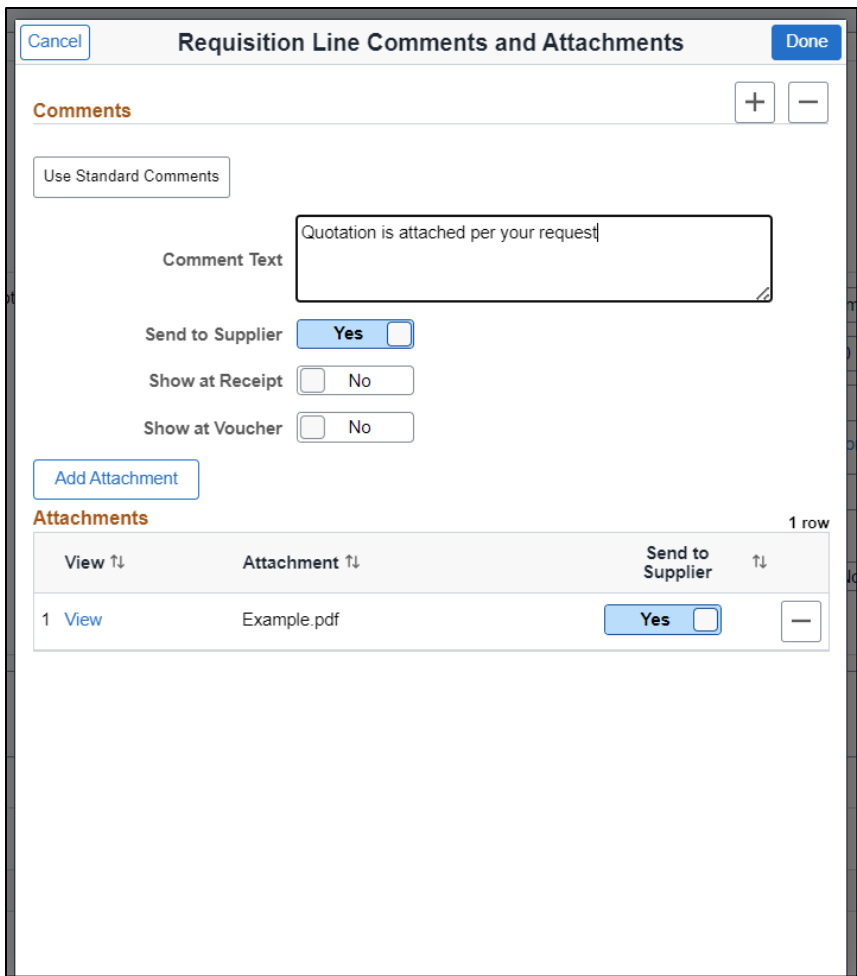
Add Attachment


Attachments 1 row

View	Attachment	Send to Supplier	↑↓
1	Example.pdf	<input type="checkbox"/> No	-

Step	Action
25.	<p>The attachment is only included when a PO is dispatched via email. It is not included in POs dispatched via Print, Fax, and EDX.</p> <p>Click the Send to Supplier slide box to display Yes to have the attachment sent with the PO created from this requisition.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Yes <input type="checkbox"/> </div>
26.	<p>Click the Done button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 10px 0;"> Done </div>

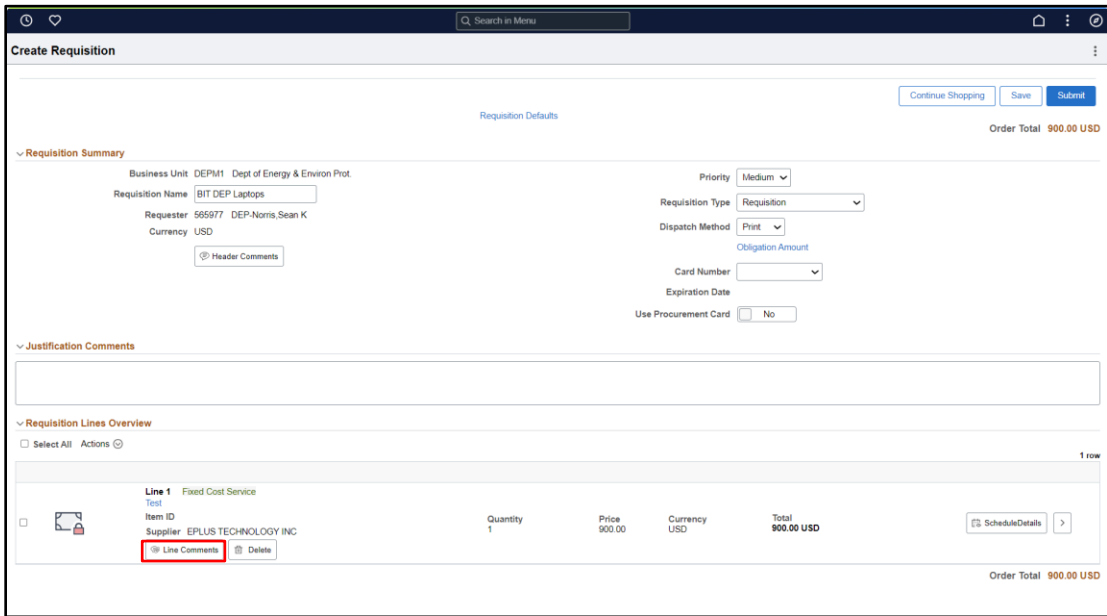
Step	Action
27.	<p>A comment is required when using attachments.</p> <p>"See Attachment" is not an acceptable comment.</p> <p>Click the Done button.</p> 

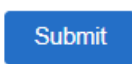


Step	Action
28.	Enter Quotation is attached per your request into the Comments field.
29.	<p>Click the Send to Supplier slide bar.</p> 

30.	Click the Done button.
	

Step	Action
31.	The Line Comments icon is where you can see the line comments entered.



Step	Action
32.	Click the Submit button.
	

Step	Action
33.	The Confirmation page will display the Approval Justification comment.

Step	Action
34.	Comments and attachment links are displayed on the Manage Requisitions - Requisition Details page.

Step	Action
35.	Approvers can review comments from approval page.

Step	Action
36.	Comments display on the View Details page available to Core-CT requesters and approvers.
37.	End of Procedure.