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.

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 attachmets as one per comment.

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

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.

Step	Action
4.	Click the **Header Comments** link.

Step	Action
5.	The **Header Comments** pop-out displays the entered comment as well as the following options: - **Use Standard Comments** - **Add Attachments** - Add and delete comment rows
6.	Click the **Add a new row** button. +

Step	Action
7.	Click the **Use Standard Comments** link.

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

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

Step	Action
10.	Click the **Look up Comment ID** button.
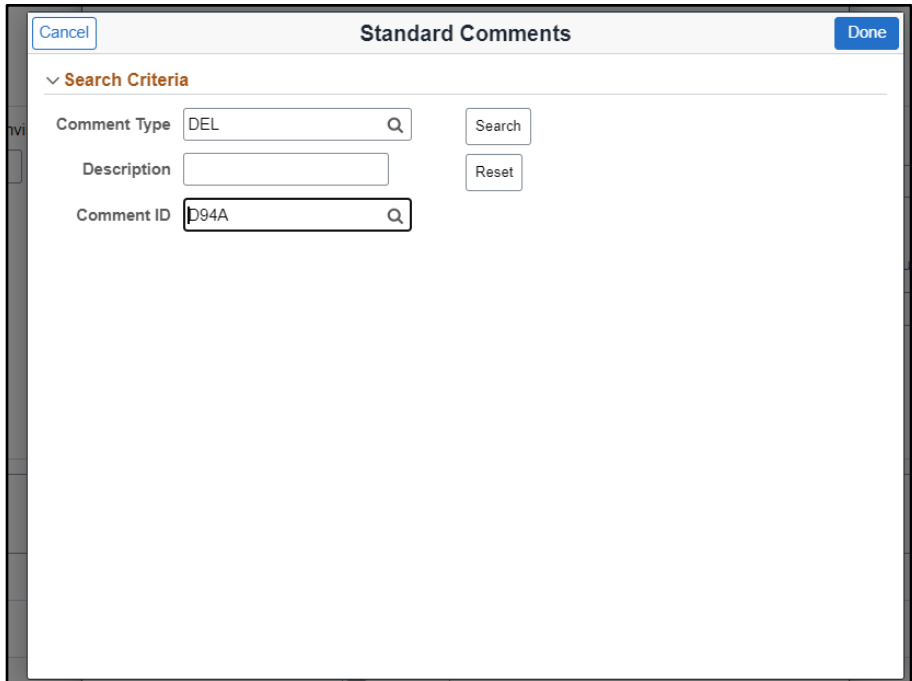
Step	Action
11.	Click the **D94A** link to select the **Receive Hours 9am-12pm & 2-4pm** comment. D94A
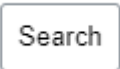
Step	Action
12.	Click the Done button. Search

Step	Action
13.	Click the **Select** slidebar.
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.

Step	Action
16.	The field populates with the standard comment. Click the **Send to** Supplier slide bar to display Yes, to have the comment print on the PO header. Send to Supplier Yes
17.	Click the **Done** button to save the comments and close the **Header Comments** page. Done

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

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

Header Comments

Priority Medium ˅
Requisition Type ITD-10 ˅
Dispatch Method Email ˅

Obligation Amount

Card Number
Expiration Date
Use Procurement Card No

˅ **Justification Comments**

Restock custom pads ok per Barack Romney

˅ **Requisition Lines Overview**

☐ Select All   Actions ⊙

1 row

☐ Line 1   Fixed Cost Service
   Test
   Item ID
   Supplier   EPLUS TECHNOLOGY INC

Quantity 1   Price 900.00   Currency USD   Total 900.00 USD

ScheduleDetails   ＞

Line Comments   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. Add Attachment
21.	Click the **My Device...** button to locate the quotation file.
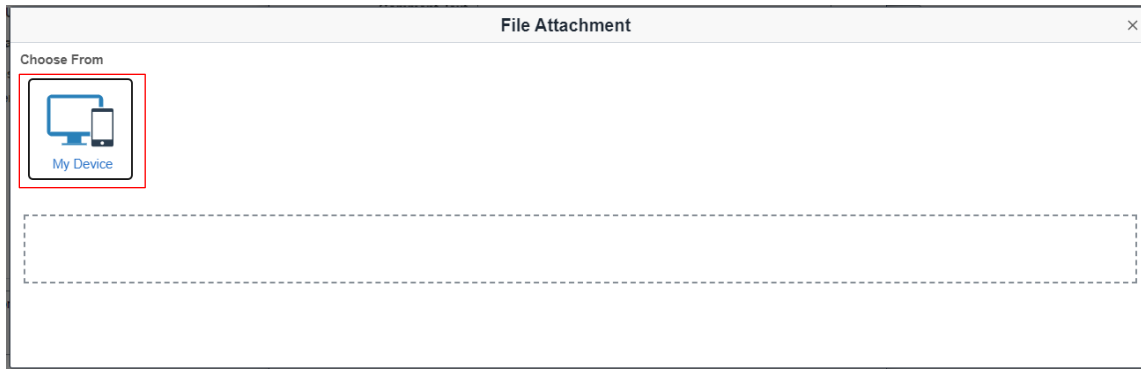
Step	Action
22.	Click any file you need to upload.
23.	Click the **Open** button.
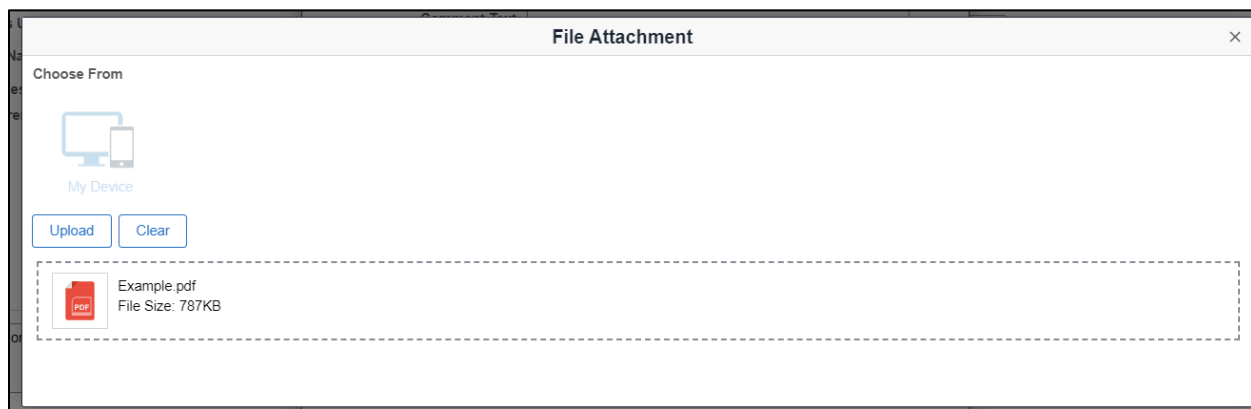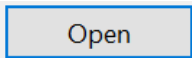
Step	Action
24.	Click the **Upload** button.
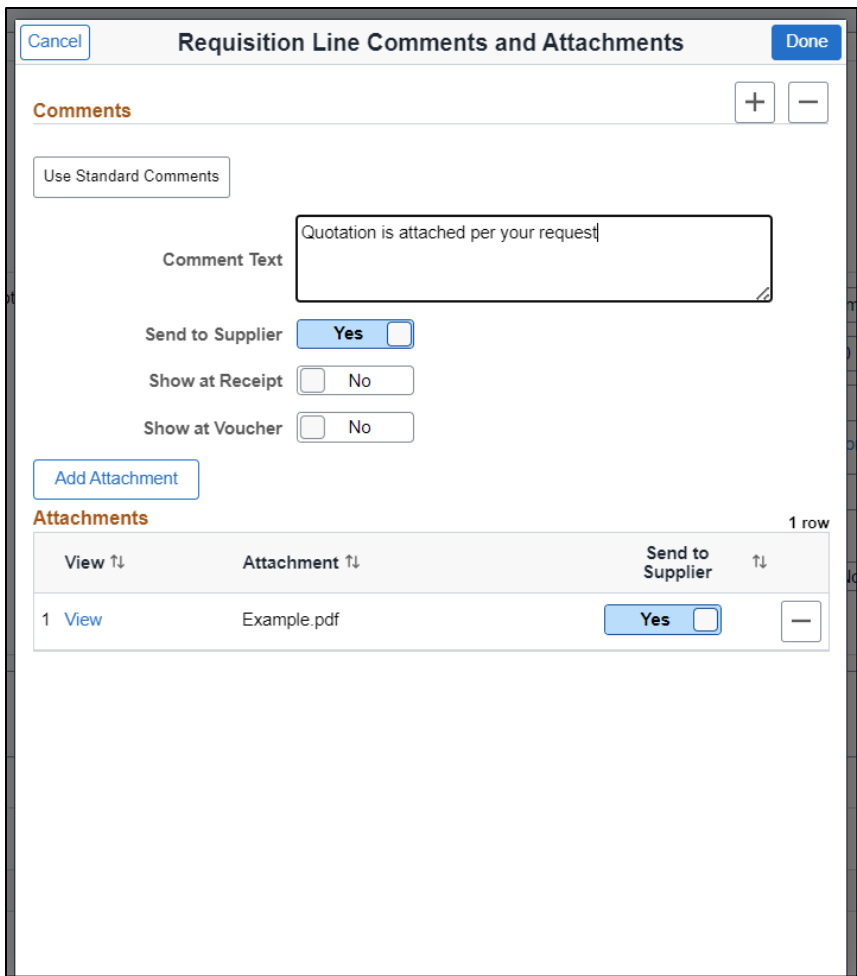
Step	Action
25.	The attachment is only included when a PO is dispatched via email. It is not included in POs dispatched via Print, Fax, and EDX. Click the **Send to Supplier** slide box to display Yes to have the attachment sent with the PO created from this requisition. Yes
26.	Click the **Done** button. Done

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

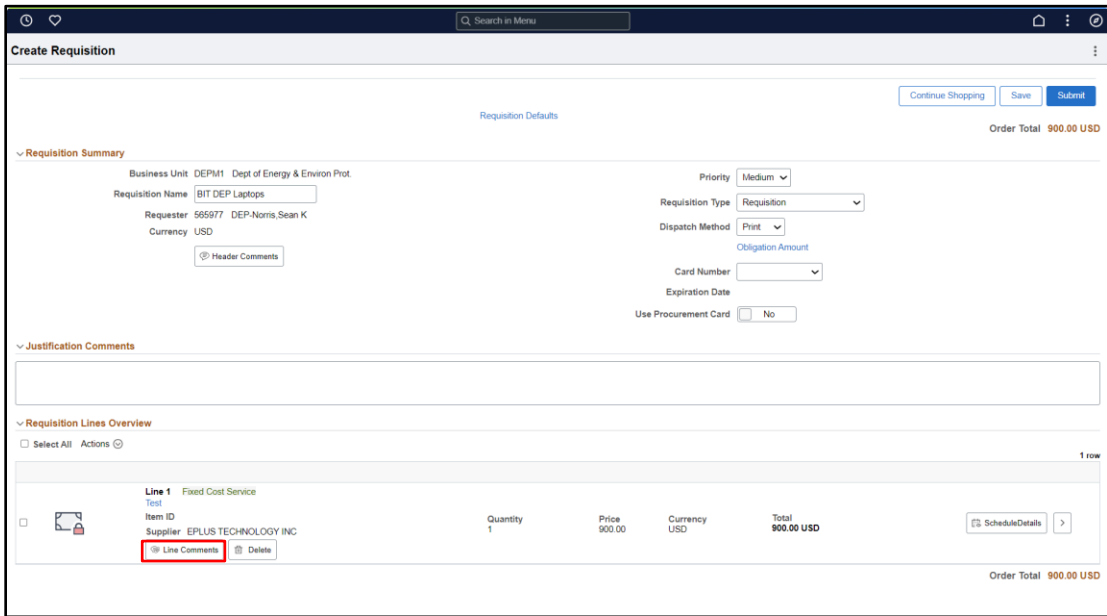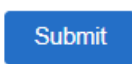| Step	Action
28.	Enter **Quotation is attached per your request** into the **Comments** field.
29.	Click the **Send to Supplier** slide bar. Send to Supplier Yes

Step	Action
30.	Click the **Done** button. Done

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

Step	Action
32.	Click the **Submit** button. Submit

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 Detail**s 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.**