

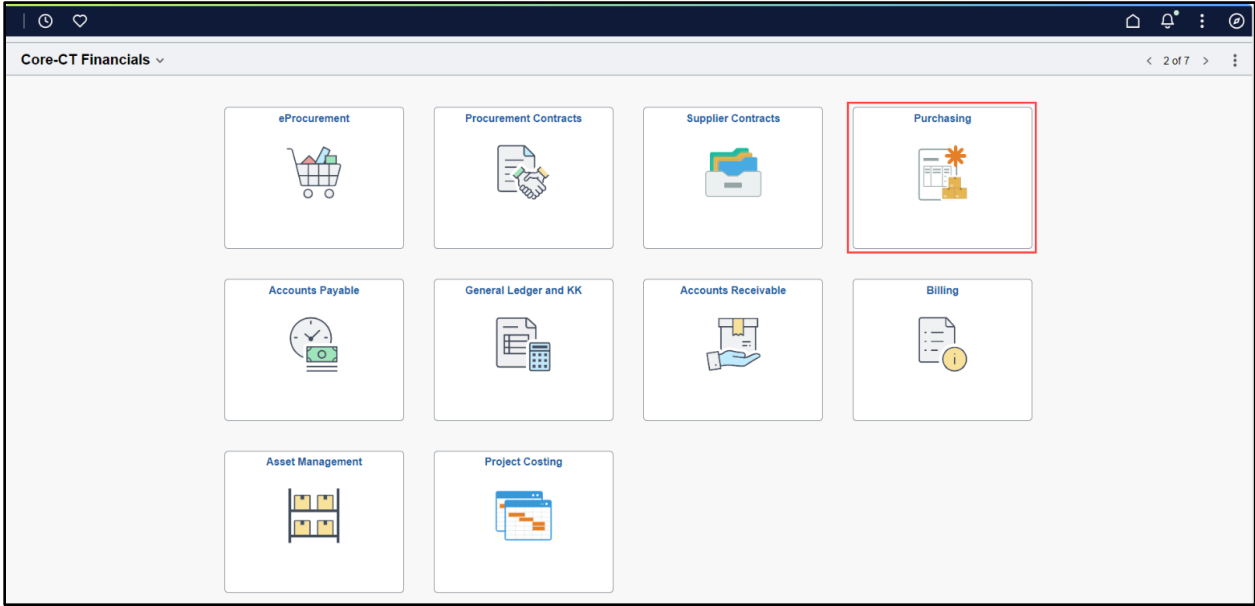


View Purchase Order Approval History

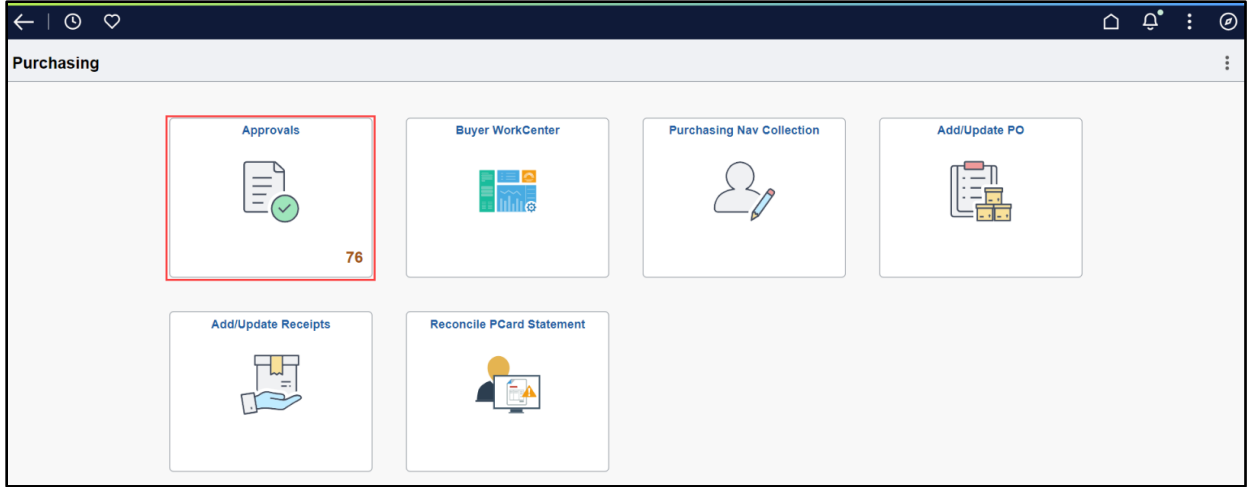
Approval history is tracked and accessible for review from the **Purchase Order Approval** page in Core-CT. This can be viewed by the Approver or the Buyer.

Navigation For Approvers:

Select **Core-CT Financials**
Click the **Purchasing** tile



Click the **Approvals** tile





Selecting the **View By** drop down organizes the **POs** pending approval by Priority, Type, Date etc.

Click the **Filters** icon displays a pop up winder with different Search Criteria fields to narrow down the search.

The screenshot shows the 'Pending Approvals' interface. On the left, there is a sidebar with a 'View By' dropdown menu set to 'Type'. Below it are filters for 'All' (76), 'Purchase Order' (12), and 'Requisition' (64). A 'Filters' pop-up window is open in the center, showing search criteria for Type, Requester, From, Date Period, Priority, Routed Date From, and Routed Date To. The main table displays a list of Purchase Orders with columns for PO number, amount, vendor, and approval status.

PO Number	Amount	Vendor	Approval Status
DASH1 / 0000020620 / DAS-	1.00 USD	JP MORGAN CHASE BANK	PO Amt Approver Less than \$10K Routed 10/05/2023
6R/24/38 WOLCOTTHILL	62,000.00 USD	FUSS & O'NEILL INC	PO Amt Approver Less than \$10K Routed 10/13/2023
SA 22OGA0002AA Exp 10/23	3,500.00 USD	ANDREA M SPENCER	PO Amt Approver Less than \$10K Routed 11/08/2023
y for Fleet Exp 12/23	1,938,350.62 USD	GEOTAB USA INC	PO Amt Approver Less than \$10K Routed 11/24/2023
/ S Maden exp 8/11/23	304,366.16 USD	COVENDIS	PO Amt Approver Less than \$10K Routed 11/24/2023
BITS: S Nunna exp 8/11/23	46,987.29 USD	COVENDIS	PO Amt Approver Less than \$10K Routed 11/24/2023
/ Pashang exp 8/11/23	270,953.36 USD	COVENDIS	PO Amt Approver Less than \$10K Routed 11/24/2023
/ BPO: 490 Capitol Ave	1,558,462.14 USD	EVERSOURCE CL&P	PO Amt Approver Less than \$10K Routed 11/24/2023

Pressing **Ctrl+F** on your keyboard brings up a search field that highlights what you type, for example a **PO #** entered will be highlighted.

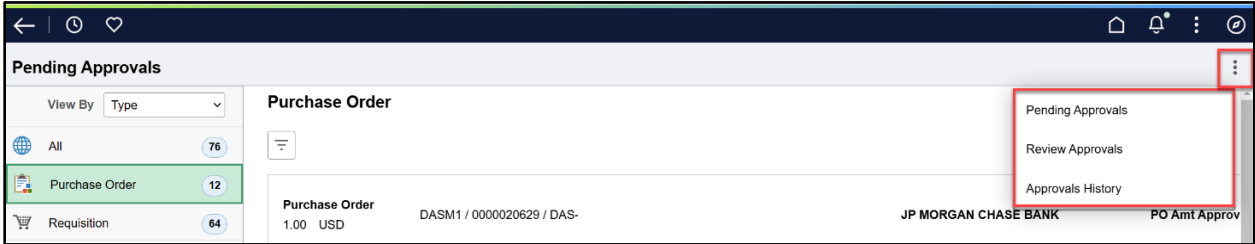
The screenshot shows the 'Pending Approvals' interface with a search bar at the top right containing the PO number '0000020629'. The search results are filtered to show only the PO with that number, which is highlighted in orange in the table.

PO Number	Amount	Vendor	Approval Status
DASH1 / 0000020629 / DAS-	1.00 USD	JP MORGAN CHASE BANK	PO Amt Approver Less than \$10K Routed 10/05/2023
DASH1 / 0000017096 / DAS-	62,000.00 USD	FUSS & O'NEILL INC	PO Amt Approver Less than \$10K Routed 10/13/2023
OGAM1 / 000001241 / DAS-	3,500.00 USD	ANDREA M SPENCER	PO Amt Approver Less than \$10K Routed 11/08/2023

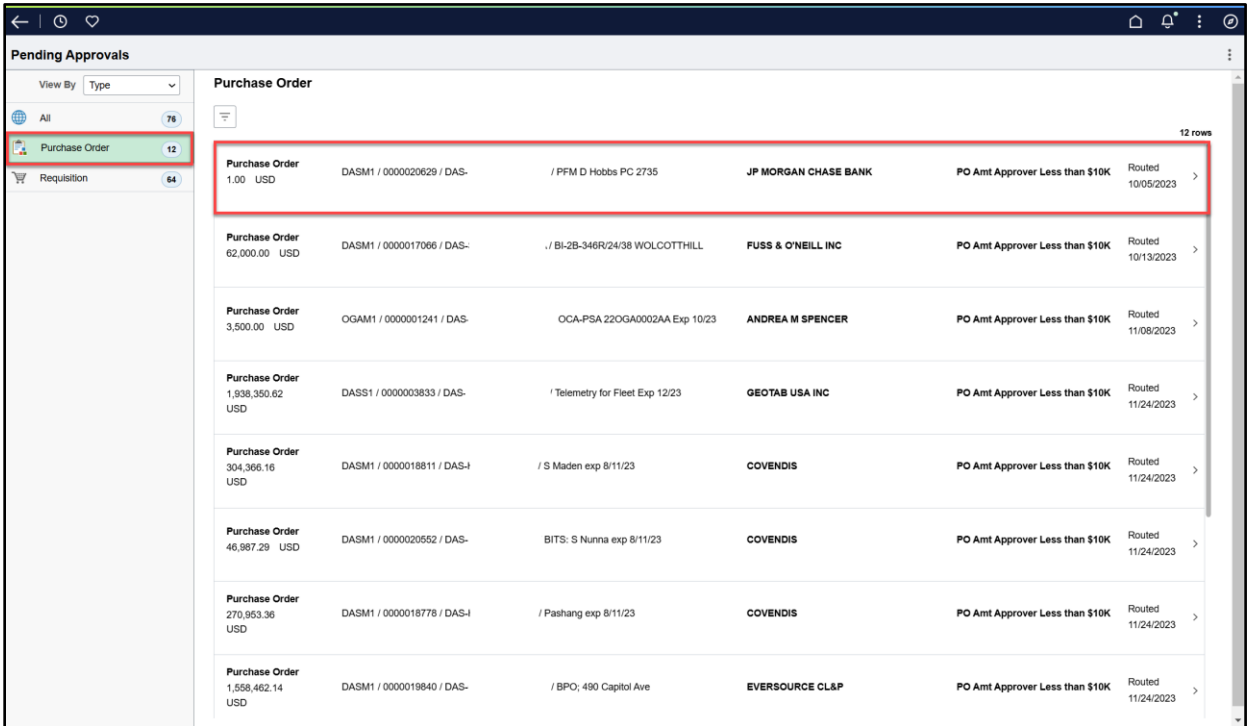


From the Pending Approvals Page, additional links can be accessed via the Actions List.

- Use these links to View Approvals History, Review Approvals, and access Pending Approvals.



Select a Purchase Order





Click Approval Chain

Purchase Order
JP MORGAN CHASE BANK
1.00 USD

Header is pending your approval

Summary

Supplier	JP MORGAN CHASE BANK	PO Total	1.00 USD
PO Reference	PFM D Hobbs PC 2735	Status	Pend Appr
PO ID	000020629	Business Unit	DASM1
PO Date	07/03/23	Routed Date	10/05/23
Buyer	DAS-	Budget Status	Not Chk'd

[Edit Purchase Order](#)

More Information

View Printable Version >

Lines

Line Number	Item Description	Merchandise Amount	1 row
1	54060 General Office Supplies	1.00 USD	>

Approver Comments

Approval Chain >

The **Approval Chain** will display.

Approval Chain

PO AMOUNT APPROVER

Purchase Order 0000020629 Pending

Start New Path

PO AMOUNT APPROVER

Pending +

Multiple Approvers
PO Amt Approver Less Than \$10K >

PO Chartfield Approver

Purchase Order 0000020629 Awaiting Further Approvals

Start New Path

PO Chartfield Approver

Not Routed +

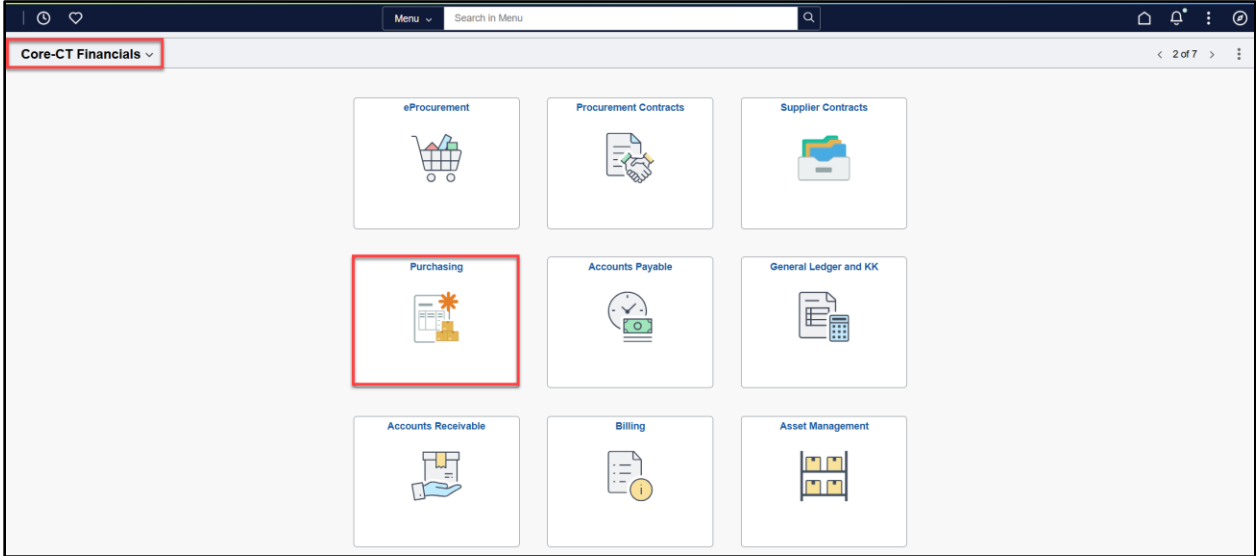
Multiple Approvers
PO Chart Field Approver >



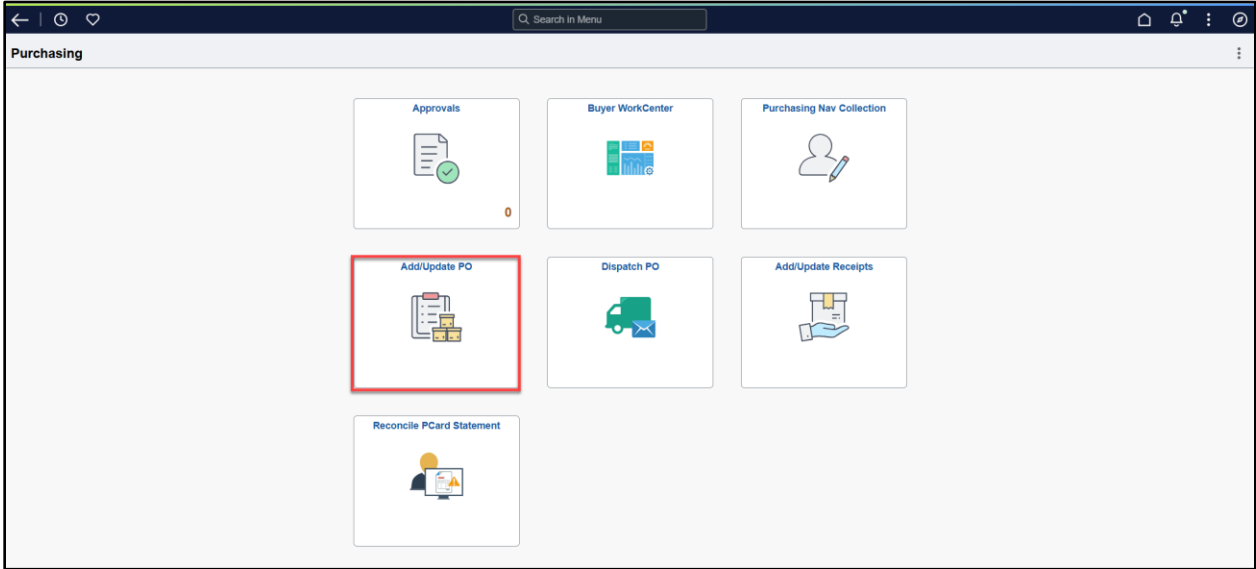
Navigation For Buyers:
Core-CT Financials > Purchasing > Add/Update PO

Buyer's Navigation:

Select **Core-CT Financials**
Click the **Purchasing** tile



Click the **Add/Update PO** tile





Click the **Find an Existing Value** button

Purchase Order

Add a New Value

*Business Unit

*PO ID

Fill in the Search Criteria fields and click **Search**

Purchase Order

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Saved Searches

*Business Unit

PO ID

Purchase Order Date

PO Status

Short Supplier Name

Supplier ID

Supplier Name

Buyer

Buyer Name

PO Type

Purchase Order Reference

Hold From Further Processing



Select a PO from the Search Results

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
DASM1	0000021094	10/09/2024	Approved	ELECTI7567-001	0000145366	ELECTION SYSTEMS & SOFTWARE LLC		DAS-	General	(blank)	N
DASM1	0000021093	10/09/2024	Open	GRAING0280-001	0000010008	GRAINGER INDUSTRIAL SUPPLY		DAS-	Grant	(blank)	N
DASM1	0000021092	10/01/2024	Pend Appr	CROMWEL033-001	0000000033	TOWN OF CROMWELL			Construct	Priority Application Invitatio	N
DASM1	0000021091	09/30/2024	Open	GRAING0280-001	0000010008	GRAINGER INDUSTRIAL SUPPLY		DAS-	GL	(blank)	N
DASM1	0000021090	09/26/2024	Open	GRAING0280-001	0000010008	GRAINGER INDUSTRIAL SUPPLY		DAS-	GL	(blank)	N
DASM1	0000021089	09/26/2024	Dispatched	GRAING0280-001	0000010008	GRAINGER INDUSTRIAL SUPPLY		DAS-	GL	(blank)	N
DASM1	0000021088	09/26/2024	Dispatched	GRAING0280-001	0000010008	GRAINGER INDUSTRIAL SUPPLY		DAS-	General	KIM_CORP_TEST	N
DASM1	0000021087	09/17/2024	Pend Appr	SUBURB8829-001	0000010291	SUBURBAN SANITATION SERVICE INC			General	DASM1 0000005025	N
DASM1	0000021086	08/20/2024	Denied	SUBURB8829-001	0000010291	SUBURBAN SANITATION SERVICE INC			General	DASM1 0000005025	N
DASM1	0000021085	08/20/2024	Pend Appr	SUBURB8829-001	0000010291	SUBURBAN SANITATION SERVICE INC			General	DASM1 0000005025	N

Click the View Approvals button

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit: DASM1
 PO ID: 0000021094
 PO Status: Approved
 Budget Status: Error
 Hold From Further Processing:

Header Information:
 *PO Date: 10/09/2024
 *Supplier: ELECTI7567-001
 *Supplier ID: 0000145366
 *Buyer: HaskelR
 Supplier Name: ELECTION SYSTEMS & SOFTWARE LLC

Amount Summary:
 Merchandise: 25.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 25.00 USD
 Encumbrance Balance: 0.00
 Obligation Amount: 25.00

Lines Table:

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		DS350	5.0000	EA	32000000	5.00000	25.00	Approved

View Approvals (highlighted with red box and arrow)

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Add, Update/Display



Approval History displays. Click on the gray arrows to see the Approval history.

The screenshot shows the 'View Approvals' interface for Purchase Order 000021094. The Business Unit is DASM1. The PO ID is 000021094, PO Total is 25.00 USD, and the Supplier is ELECTION SYSTEMS & SOFTWARE LLC. The PO Status is 'Approved' and the PO Date is 10/09/2024. The Budget Status is 'Error'. The Buyer is DAS- and the User Name is DAS-. The Justification field is empty with the text 'No justification entered by buyer.' There are buttons for 'View Printable Version' and 'Edit PO'. A 'Review Lines' link is visible. Under 'Review / Edit Approvers', there are two sections: 'PO AMOUNT APPROVER' and 'PO Chartfield Approver', both showing 'Purchase Order 000021094:Approved'.

If the Po is partially approved, you will see the approval workflow.

The screenshot shows the 'View Approvals' interface for Purchase Order 000022530. The Business Unit is ECDM1. The PO ID is 000022530, PO Total is 10.00 USD, and the Supplier is GRAINGER INDUSTRIAL SUPPLY. The PO Status is 'Pend Appr' and the PO Date is 10/10/2024. The Budget Status is 'Not Chk'd'. The Buyer is 164150 and the User Name is ECD-Flanagan Jessica R. The Justification field is empty with the text 'No justification entered by buyer.' There are buttons for 'View Printable Version' and 'Edit PO'. A 'Review Lines' link is visible. Under 'Review / Edit Approvers', there are two sections: 'PO AMOUNT APPROVER' and 'PO Chartfield Approver'. The 'PO AMOUNT APPROVER' section shows a workflow: 'Approved' by ECD-Bocwinski Cheryl A. (PO Amt Approver Less Than \$10K, 11/13/24 - 11:25 AM) followed by 'Pending' by ECD-Woodward Kathy (Inserted Approver). The 'PO Chartfield Approver' section shows a workflow: 'Not Routed' by Multiple Approvers (PO Chart Field Approver) followed by 'Not Routed' by DAS-Raymond Mark (Inserted Approver). A red box highlights these workflow sections.

End of Procedure