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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

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Core-CT Financials ~					< 2 of 7 >
	eProcurement	Procurement Contracts	Supplier Contracts	Purchasing	
	Accounts Payable	General Ledger and KK	Accounts Receivable	Billing	
	Asset Management	Project Costing			

Click the **Approvals** tile

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Purchasing								:
	Approvals	Buyer WorkCenter	Purchasing Nav Collection	Add/Update PO				
	Add/Update Receipts	Reconcile PCard Statement						

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Selecting the **View By** drop down organizes the **PO**s 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.

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Pending Approvals								
View By Type - Purcl	hase Order							4
	-					1	2 rows	
Purchase Orde 12 Purchase Orde 12 Requisition 64 1.00	chase Oru r DISD	20020 / DAR / DEM	P Hobbs PC 2735	JP MORGAN CHASE BANK	PO Amt Approver Less than \$10K	Routed 10/05/2023	,	l
← ○ ♥ Pending Approvals View By Type ♥	chase Order 1 000.00 USD Reque	Filters Image: Control of the second secon	6R/24/38 WOLCOTTHILL	FUSS & O'NEILL INC	PO Amt Approver Less than \$10K	Routed 10/13/2023	>	
All Date Routed From From From Purchase Priority Requisitio Requester	Chase Order Pric 20,00 USD Routed Date P Routed Date	vidu vita vita vita vita vita vita vita vita	5A 22OGA0002AA Exp 10/23	ANDREA M SPENCER	PO Amt Approver Less than \$10K	Routed 11/08/2023	>	
Type Purc 1,93 USC	rchase Order 38,350.62 D	Rest	y for Fleet Exp 12/23	GEOTAB USA INC	PO Amt Approver Less than \$10K	Routed 11/24/2023	>	l
Pur 304, USC	chase Order ,366.16 DASM1 / 00000 D	018811 / DAS-ł / S Mader	n exp 8/11/23	COVENDIS	PO Amt Approver Less than \$10K	Routed 11/24/2023	>	l
Pur 46,9	Chase Order DASM1 / 00000 987.29 USD	020552 / DAS- BITS: S	Nunna exp 8/11/23	COVENDIS	PO Amt Approver Less than \$10K	Routed 11/24/2023	>	l
Pur 270, USD	rchase Order ,953.36 DASM1 / 00000 D	018778 / DAS-I / Pashang	g exp 8/11/23	COVENDIS	PO Amt Approver Less than \$10K	Routed 11/24/2023	>	l
Pur 1,55 USC	chase Order 58,462.14 DASM1 / 00000 D	019840 / DAS- / BPO;	; 490 Capitol Ave	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.

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P	Inding Approvals							_	-			:	
	View By Type	~	Purchase Order										^
	All	76	Ŧ										. 1
Ē	Purchase Order	12	Burghase Order									12104	î I
У	Requisition	64	1.00 USD	DASM1 / 0000020620 / DAS-	JP MORGAN CHASE BANK		PO Amt Approver Le	rss than \$	10K		Routed 10/05/2023	>	
			Purchase Order 62,000.00 USD	DASM1 / 0000017096 / DAS-	FUSS & O'NEILL INC		PO Amt Approver Lo	ss than \$	10K		Routed	>	
											10/13/2023		
			Purchase Order 3,500.00 USD	OGAM1 / 0000001241 / DAS-	ANDREA M SPENCER		PO Amt Approver Le	iss than \$	10K		Routed 11/08/2023	>	

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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.

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Pending Approvals		1
View By Type ~	Purchase Order	Pending Approvals
() All 76	Ŧ	Review Approvals
Purchase Order 12		Approvals History
تَنْ Requisition 64	Purchase Order DASM1 / 0000020629 / DAS- JP MORGAN CH 1.00 USD JP MORGAN CH JP MORGAN CH	ASE BANK PO Amt Approv

Select a Purchase Order

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Per	iding Approvals									:
	View By Type	~	Purchase Order							*
	All	76	-						42	.
Purchase Order 12 Preduction 64		12 64	Purchase Order 1.00 USD	DASM1 / 0000020629 / DAS-	/ PFM D Hobbs PC 2735	JP MORGAN CHASE BANK	PO Amt Approver Less than \$10K	Routed 10/05/2023	>	
			Purchase Order 62,000.00 USD	DASM1 / 0000017066 / DAS	,/ BI-2B-346R/24/38 WOLCOTTHILL	FUSS & O'NEILL INC	PO Amt Approver Less than \$10K	Routed 10/13/2023	>	
		Purchase Order OGAM1 / 0000001241 / DAS OCA-PSA 220GA0002AA Exp 10/23 ANDREA M SPENCER PO Amt Approver Less to	PO Amt Approver Less than \$10K	Routed 11/08/2023	>					
			Purchase Order 1,938,350.62 USD	DASS1 / 0000003833 / DAS-	[/] Telemetry for Fleet Exp 12/23	GEOTAB USA INC	PO Amt Approver Less than \$10K	Routed 11/24/2023	>	
		Purchase Order 304,306.10 USD DASM1 / 000018811 / DAS-I / S Maden exp 8/11/23 COVENDIS PO Am Purchase Order 46,987.29 USD DASM1 / 0000020552 / DAS- BITS: S Nunna exp 8/11/23 COVENDIS PO Am Purchase Order 270,953.36 DASM1 / 000018778 / DAS-I / Pashang exp 8/11/23 COVENDIS PO Am	/ S Maden exp 8/11/23	COVENDIS	PO Amt Approver Less than \$10K	Routed 11/24/2023	>			
			PO Amt Approver Less than \$10K	Routed 11/24/2023	>					
			PO Amt Approver Less than \$10K	Routed 11/24/2023	>					
			Purchase Order 1,558,462.14 USD	DASM1 / 0000019840 / DAS-	/ BPO; 490 Capitol Ave	EVERSOURCE CL&P	PO Amt Approver Less than \$10K	Routed 11/24/2023	>	

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Click Approval Chain

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Purchase Order				
JP MORGAN CHASE BANK				
1.00 USD		Approve	Deny	More
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	0000020629	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				
				1 row
Line Number	Item Description	Merchandise Amount		
1	54060 General Office Supplies	1.00 USD	>	
Approver Comments	æ			
Approval Chain	>			

The Approval Chain will display.

Approval Ch	ain
O AMOUNT APPROVER	
Purchase Order 0000020629	Pending
Start New Path	
PO AMOUNT APPROVER	
E Pending	+
Multiple Approvers PO Amt Approver Less Than \$10K	>
O Chartfield Approver	
VPurchase Order 0000020629	Awaiting Further Approvals
Start New Path	
PO Chartfield Approver	
Mot 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

0 0	Menu 🤟 Search in Menu		Q	∩ ¢• : Ø
Core-CT Financials ~				< 2 of 7 >
	eProcurement	Procurement Contracts	Supplier Contracts	
			.	
	Purchasing	Accounts Payable	General Ledger and KK	
	Accounts Receivable	Billing	Asset Management	

Click the Add/Update PO tile

$\leftarrow \mid \odot \bigtriangledown$	Q :	Search in Menu		Ô	Û,	:	Ø
Purchasing							:
	Approvals	Buyer WorkCenter	Purchasing Nav Collection				
		Dispatch PO	Add/Update Receipts				
	Reconcile PCard Statement						

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Click the Find an Existing Value button

\leftarrow \odot \heartsuit	
Purchase Order	
Add a New Value	Q Find an Existing Value
*Business Unit DASM1 Q *PO ID NEXT	
Add	

Fill in the Search Criteria fields and click Search

\leftarrow O \heartsuit				
Purchase Order				
Find an Existing Value				⊕Add a New Value
✓ Search Criteria				
Enter any information you have and click Search	Leave fields blank	for a list of all values.		
Recent Searches Choose from recent searches		✓ ✓ ☐ Saved Searches	Choose from saved searches	~ <i>I</i>
*Business Unit	= ~	DASM1	۹	
POID	begins with \checkmark]	
Purchase Order Date	= ~			
PO Status	= ~	`		
Short Supplier Name	begins with v		Q	
Supplier ID	begins with v		Q	
Supplier Name	begins with v		Q	
Buyer	begins with v		Q	
Buyer Name	begins with \checkmark		Q	
РО Туре	= ~	~		
Purchase Order Reference	begins with $\mathbf{\checkmark}$			
Hold From Further Processing				
∧ Show fewer opt	ons			
□ Case Sensitive				
Search	Clear			

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Select a PO from the Search Results

Inchase Order Search Results Drily the first 300 results of a possible 1689 can be displayed. Business Unit "DASM1" (< 1-10 of 300 ~ > >) View 100												
									Business Unit	PO ID	Purchase Order Date	PO Status
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	000000033	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	3
DASM1	0000021089	09/26/2024	Dispatched	GRAING0280-001	0000010008	GRAINGER INDUSTRIAL SUPPLY		DAS-	GL	(blank)	N	3
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 000005025	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			General	DASM1 000005025	N	

Click the View Approvals button

← ③ ♡									
Add/Update POs	Add/Update POs								
Maintain Purchase Order Purchase Order									
Business Unit PO ID Copy From	DASM1 0000021094	PO Budget	PO Status Approved X Sget Status Error Hold From Further Processing						
✓ Header ⑦ *PO D ⁻	ate 10/09/2024	Supplier Search Dr	Dec Tel Status Valid						
"Suppl ^Supplier	er ELECTI7567-001 Q	Supplier Details ELECTION SYSTEMS & SOFTWARE LLC Re	Receipt Status Not Record						
*Buj PO Referen	ver HaskellR Q	*Disp	Promy Integrating V Deputch						
	Header Details PO Defaults PO Activities Requisitions ~Actions	Activity Summary Add Comments Add ShipTo Comments Document Status Frei	Marchandise 25.00 Calculate FreightTbx/Misc. 0.00 Calculate Total Amount 25.00 USD						
Add Items From (D	Encumbr Oblig: Select Lines To Dis	mbrance Balance Aligation Amount 25.00 Display O						
Lines ⑦	Catalog Item Search Search for Lines Line Q To Q Retrieve								
E Q Details Shi	p <u>T</u> o/Due Date	Item Information	K < T-Tatt > > I View All						
Line	Item	Description	PO Qry "UOM Category Price Merchandise Amount Status						
1 🗎		Q DS350	EA Q 3200000 Q 50000 2500 Approved Image: Contract of the state of the						
View Printable Versio	Vere Piertade Version "Go to"								
Save Return	to Search Previous in List	Next in List Notify Refresh	Add Update/Display						

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

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View Appro	vals					
Business Unit	DASM1	View Printable Version				
PO ID	0000021094	New Printable Version		PO Status	Approved	
PO Total	25	.00 USD		PO Date	10/09/2024	
Supplier ID	0000145366	ELECTION SYSTEMS & SOFTW	ARE LLC	Budget Status		43
Buyer		User Maine	DAS-	Justification	No justification entered by buyer.	LEN
PO Reference						/
Ed	lit PO					
> Review Lin	es dit Approvers					
PO AMO		VER				
► F	urchase Order	0000021094:Approved				
PO Char	tfield Approv	er				
► F	Purchase Order	0000021094:Approved				
Return to Purch	ase Order					

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

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View Approvals							
2 🖬 😌 🌣							
Business Unit PO ID PO Total Supplier ID Buyer PO Reference Ec > Review Lin	ECDM1 0000022530 10.00 USD 0000010008 GRAINGER INDUSTRIAL SUPPLY 164150 User Name ECD-Flanagan Jessica R Test Approval History III PO	PO Status PO Date Budget Status Justification	Pend Appr 10/10/2024 Not Chk'd No justification entered by buyer.	<u>لا</u>			
Review / E	dit Approvers	1					
T C AMO	Purchase Order 0000022530:Pending						
PO AMO	UNT APPROVER Ved ECD-Bocwinski Cheryl A PO Ant Approver Less Than \$10K → Pending C ECD-Woodward Kathy						
PO Char	tfield Approver						
- F	Purchase Order 0000022530:Awaiting Further Approvals Path						
P0 Chart	Iot Routed Multiple Approvers PO Chart Field Approver						
Return to Purch	lase Order						

End of Procedure