Purchasing Frequently Asked Questions – May 2022

This document is to assist users with various questions when working in Core CT. We have tried to answer the various scenarios. Most of the questions have detailed job aids on the Core website under the specific Module. Review the responses to see if it applies and assists with resolving the issue. If not, please submit a Footprints Help Desk ticket for further assistance.

Question #1: My PO will not Dispatch.

Answer: Review the PO and verify that the status of the PO is Approved and Valid. A PO will not dispatch if it is not Approved and Valid. Once those are correct, check the Run Control ID used to Dispatch and confirm that the Test Dispatch Check box is NOT Checked.

Navigation: Purchasing > Purchase Orders > Dispatch PO

Question #2: I cannot receive on my PO.

Answer: Review the following areas:

1. Verify the PO is Dispatched. A PO cannot be received unless it is Dispatched.
2. Verify a receipt was not already done by checking the PO 360 View.

Navigation: Purchasing>Purchase Orders>Review PO Information>PO 360 View

3. Make sure that the ship to location is blank in the search criteria as it may be different on the PO.
4. Make sure the radio button for PO Remaining Qty is selected.

Question #3: I did a Change Order to my PO, but it did not create a change order number

Answer: A change order number will not be created if the changes are made prior to the PO being dispatched.

TIP: Change order numbers will be created if the change needs to be sent to the vendor once the PO has been dispatched.

Question #4: I canceled my PO and the status changed to Pending Cancel, what do I do now?

Answer: If the PO was Dispatched and then canceled, the PO the status will change to Pending Cancel. The idea is that the vendor needs to be notified that the order is canceled. Dispatch the PO and the status will change to Canceled and then it can be closed through the Buyers Workbench.

TIP: If the PO is canceled before it is dispatched, the PO status will go to Canceled automatically and then can be closed.

Question #5: My PO was created from a requisition with a status of Open rather than Approved or Dispatched.

Answer: If there was an issue with the Purchasing Authority (i.e., Using a Contract ID with a GL purchasing authority) on the requisition when it was ready to be sourced to a PO, the system will still create the PO but with a status of Open so that the Buyer can make the necessary corrections to the PO.

TIP: The PO will then need to be approved and budget checked again before it can be Dispatched to the vendor.

Navigation: Purchasing > Purchase Orders > Add/Update PO

Question #6: I cannot locate my PO from a requisition or some of the requisition lines are missing from my PO. What do I do?

Answer: Go to the Sourcing Workbench to search for the requestion and the error.

Navigation: Purchasing > Purchase Order > Stage Source Request > Sourcing Workbench

There is a process called Sourcing which takes the requisition and creates a PO based on the information on the requisition. This process runs during Batch Processing (10am,12noon, 2pm, 8pm/overnight). If there is an issue with a line or the requisition header, it will Error in the Sourcing Workbench and will require User intervention.

TIP: Select Reset/Purge from the workbench to allow access to the requisition in Manage Requisitions. This will also need to be done to view the associated contract.

Navigation: eProcurement > Manage Requisitions

Or to view the contract in Procurement Contracts

Navigation: Procurement Contracts > Add/Update Contracts.

Question #7: Why can I not select the correct Contract ID on my PO?

Answer: This usually happens when the Supplier ID on the Purchase Order does not match the Supplier ID used on the Procurement Contract. This could also be due to the expiration date on the contract where the contract is expired.

Navigation: Procurement Contracts > Add/Update Contracts.

Check that the Purchase Order date is not prior to the Begin date of the contract. A PO cannot be created prior to the begin date of the contract. Check both the contract and the Purchase Orde and make the necessary changes.

TIP: If the Procurement Contract in Core differs from the Contract in CTSOURCE contact the DAS Contract Specialist so they may make the corrections in Core.

Core-CT

Question #8: Why isn't my PO showing up in my Approvers Worklist?

Answer: This could happen for several reasons. First review the View Approvals to ensure the approver is missing from the approval workflow.

PO Navigation: Purchasing > Purchase Orders > Add/Update Purchase Orders)

1. The approver may have received the approval role after the transaction was submitted for approval; if that was the case, re-initiate the workflow by changing something on the requestion, then submit/save again.
2. Contact the agency Core Security Liaison to ensure the approver was set up properly.

Question #9: My PO isn't Budget Checking. What do I do?

Answer: View the Purchase Order to ensure it is not in Budget Error.

PO Navigation: Purchasing > Purchase Orders > Add/Update Purchase Orders

During Fiscal Year End approximately July 1st through GL Close (2nd week of July) Budget Check runs on a modified schedule. Purchase Orders that were rolled during the Fiscal Year End process (including ones that have change orders done) will only be picked up by modified Budget Check process once a day. The regular BATCH process will continue to run at 10am, 12noon, 2pm, 8pm/overnight, but will only pick up new POs that were newly created after July 1st.

TIP: If the Purchase Order is an emergency and cannot wait until the normal budget check process, put in a Footprints Help Desk ticket and request that the Purchase Order be budget checked.

Question #10: My PO has the wrong Buyer. It shows someone from Core as the Buyer. What do I do?

Answer: If this happens, create a Footprints Help Desk ticket to have it corrected.

This happens when a requisition sources to a PO because the requisition has 2 places where the Buyer can be entered but the PO has only 1 place. On the requisition the Buyer field is in the Define Requisition section **and** in the Line Details of each line. If the Requester enters 2 different Buyers, the requisition will source with the Default Buyer (which is usually a Core CT employee) because the system does not know which one to use. In most cases the Buyer at an agency is also the Requisition Purchasing Approver, so the lines should be reviewed to verify they all have one buyer. If it does, the requisition can be edited to prevent this issue.