


## Purchasing Operators Meeting 2/15/2007 Notes

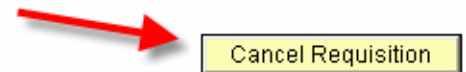
- What is the difference between Closing and Canceling and who gets the requests?
  - When there *has been no* vouchering against a purchase order it can be **Cancelled**. These requests to go Purchasing. cancelpo@admin.umass.edu
  - When there *has been* vouchering against a purchase order it can be **Closed**. These requests continue to go to Accounts Payable.
- How do I cancel a requisition?
  - If the requisition has not yet become a purchase order, go to manage requisitions, find your requisition and in the drop down box at the right

select, cancel requisition and click GO 

**Business Unit:** UMAMH **Date:** 02/07/2007  
**Requisition Name:** R000000048 **Status:** Approved  
**Requisition ID:** R000000048 **Total:** 65.67

Line	Item Description	Status	Price	Qty	Total
1	<a href="#">SULFO-NHS-LC BIOTIN,HOOK 2X25</a>	Approved	65.670 Each	1.0000	\$65.67

[Return to Manage Requisitions](#)



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- If a Change Request requisition has been cancelled, that means the change has been done on the purchase order.
- I cannot print my Marketplace purchase orders?
  - This is because it uses the same program as the dispatch program and since Marketplace orders are not printed, it is not allowing us to print an unauthorized copy. This is a high priority fix and is being worked on.
- Trouble looking up items in Marketplace – search requires complete catalog number, including size, unit of measure.
  - John Martin, Director of Procurement, will investigate but in the meantime use as complete a search as possible. Also, for WB Mason, make sure you have the most recent catalog as catalog numbers have changed recently.
  - If the vendor appears in the Marketplace, but you are unable to locate a contract item from that vendor, please email John Martin with the vendor

name, the catalog number, and the item description. John will research the item and get back to you.

- A vendor has not received a purchase order but it shows as dispatched when I look at it online
  - The first couple of weeks there were issues with Pos dispatching but not printing. We tried to figure out which orders were affected but if you find that vendor did not receive a purchase order, please contact Procurement and we will re-dispatch.
- Can orders be approved faster? Quotes are expiring before the PO gets out the door
  - We are testing some modifications to workflow that will speed up the required approvals.
- If workflow is missing or we have other problems, who do we call?
  - Call 5-2119 and ask for Brenda or Patty
- HINT: many of the pages in financials are 'pop-ups' especially on inquiry pages. You need to turn off pop up blocker on your browser
- Can we have the reason for denial added to the denial email?
  - We will make the request and see if we can
- How can an approver activate the Mark Worked button? Requisitions that are fully sourced still appear in some worklists.
  - If this happens, send an email to Brenda Clemons at [bclemons@admin.umass.edu](mailto:bclemons@admin.umass.edu) or Patty Roper at [roper@admin.umass.edu](mailto:roper@admin.umass.edu) with the requisition number(s) and they will remove them from your list.
- Can we have the reason for payment delay added to comments somewhere (PO?) so we don't have to bother Accounts Payable?
- Users really want the requisition name field to copy to the PO Reference field and then be able to look up in PO Inquiry (PO Ref field not available in PO Inquiry Search page)
  - We will make this enhancement request
- Would like to see the vendor name added to the Manage Requisitions page
  - Currently the vendor name is only on the PO lines after you click the requisition id. We will make an enhancement request to add the vendor to the requisition lines on this page
- Can we have Location and Ship To print on the Requisition Print Report
  - This is being fixed as a high priority request

- Explain how to use Other to define a special Ship To address
  - If you don't have a correct Ship To address available to you, you can select OTHER, which will print, "See Description for the Address" on the purchase order, and add the Ship To address to the comment. Be aware that there are Ship To addresses loaded in the system for chemical deliveries (CHEMS) and Environmental Health and Safety (EHS). OTHER should not be used for these two Ship Tos.
- Where can we find the tolerances on a PO?
  - PO Inquiry, Schedule Details. Category controls the tolerance.
- Inquire on Vouchers – Want to easily see voucher \$ amount
  - Job aid will be forthcoming
- How can I see employee reimbursements?
  - Job aid will be forthcoming. You can see the reimbursements if they occurred in 7.5 by using the voucher inquiry page
- What should we do if we get an error message in the middle of the requisition?
  - Call the help desk at 5-2119. Someone will be able to assist you.
- Location building names are not good and don't make a lot of sense to the vendors or shippers. Can we change them?
  - Locations are shared by Asset Management, Procurement and Grants. We will be doing a cleanup to make sure the building names make sense. We may need to work with some departments on appropriate naming (ex Hills North, Hills South)
- I put in a comment and now I don't see it?
  - Because requisitions only have one comment available on the header, and one comment available on the line, if there are some comments that are not to be sent to vendor, they are being moved to approval or line comments.
- When I search on a vendor I do not see my address, what do I do?
  - Look up the vendor by inquiring on the vendor code under Vendors → Vendor Information
    - If you see your address then it needs to be associated with a location for use on a requisition. Please contact Angela Kapinos at [angleak@admin.umass.edu](mailto:angleak@admin.umass.edu) with the vendor id and address number.
    - If you do not see your address, you will need to follow the usual procedures to request a new vendor address
- I see all remit addresses, why?

- In 89 we do not make a distinction between a remit and an order address. One address can be used for both. You should choose the address you need based on where your purchase order should be sent.
- I see three different addresses for my vendor, which one do I choose?
  - Now that we share the vendor file with the other 4 campuses and the President's Office, you may see order addresses you never did before. If an address is in the system, it is available for your use. It is still the responsibility of the department to know which address the purchase order should be sent to and select accordingly.
- Reimbursement to a student went to the student's home address, why?
  - Employee addresses in the employee vendor file come from Human Resources. The student must have put his/her home address on file in HR. We will check to see what the options are for this.