

ePurchasing version 3.5 Release Notes

Summary of enhancements

- Query tool for listing purchase orders
- Improved change order processing
- Redesigned printed forms
- Secured transmission of user id and password
- Modify equipment vesting edit
- Modify vendor flag edits for reportable subcodes with \$0
- Modify maintain user page for better usability
- Add 7625 and 7628 to the restricted subcodes that require OPRPM approval
- Freeze vendor name on payment when payment is released
- Remove access to 'edit' on submitted POs for the Central Procurement role
- Fix the menu vendor search (Netscape)

Detailed descriptions of enhancements

Query tool for listing purchase orders

A new option on the main menu, 'List purchase orders', has been added to provide users with the ability to generate listings of their purchase orders based on selection criteria. The selection criteria include Purchase Order No., Requisition No., Requisitioner, Vendor Name, FO Code, and Created Date. Based on the values entered in the selection fields, the system will return a listing of the approved purchase orders that fit the criteria. This feature is similar to the 'Inquire on existing purchase orders' option, but it will only return purchase orders that the user has access to. The 'Inquire on existing purchase orders' option returns all purchase orders, even those that do not belong to the user.

Improved Change Order Processing

The Change Order processing has been improved to include an 'Authorize' step for the Approving Authority to authorize the draft change order. The general flow of processing is 1) Preparer/Requisitioner creates the change order, 2) Requisitioner submits the change order, 3) Approving Authority authorizes the change order, 4) Fiscal Staff a) approves the change order (if within their purchasing authority) or b) routes the change order to OPRPM, 5) OPRPM approves the change order (if outside fiscal officer's purchasing authority). Please note, change orders must be submitted before being approved.

The initial listing of documents has been removed to increase response time. At the change order search page, either the entire document number or part of a document number can be entered. If the entire document number is entered, the system will return a list of the original purchase order, any processed change orders and any pending change order. If no change order is pending, a line with status 'New POCF' will be listed. Selecting this line will create a new change order. A new change order can also be created by selecting the 'Create New POCF' button on the approved purchase order/change order. If part of the document number is entered, the system will return a listing of all approved purchase orders or pending change orders with the document number prefix.

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Redesigned printed forms

The printed forms have been modified to print the Approving Authority's name and title in place of the 'Typed Name' and 'Title' on the signature line of the requisition. The Fiscal Officer name will also be printed under the FO signature line on the requisition, purchase order and change order documents. Fields have been added to the web form to capture this information.

The watermarks on the change orders have been modified to include the 'Non-Negotiable' wording on submitted, authorized and routed change orders.

The printed attachments have been modified to print the approver's name underneath the signature line if entered on the form.

The secondary pages were not printing the 'Changed' column on the vendor's copy of the POCF and the 'Subcode' column in the item block on the internal copies. This has been fixed.

Secured transmission of userid and password

The system has been enhanced to use a secured protocol when the user logs in. This will protect the transmission of the userid and password across the network.

Modify equipment vesting edit

The equipment vesting edit that requires values in the equipment location and equipment owned by fields if a 77xx subcode is used has been modified to only require this information if the 77xx subcode has a non-zero dollar amount. The system will also bypass this edit for subcode 776x.

Modify vendor flag edits for reportable subcodes with \$0

The vendor flag edits that check for valid values in the WH Ind and the 1099/1042 code fields if a reportable subcode is used on the payment have been modified to bypass the edit if the subcode amount is \$0.

Modify maintain user page for better usability

The maintain user information page has been modified for easier use. The roles are now listed vertically and the Billing address can be defaulted to the Delivery address.

Add 7625 and 7628 to the restricted subcodes that require OPRPM approval

Two new subcodes 7625 and 7628 are restricted and require OPRPM approval. Purchase orders with these subcodes will need to be submitted to OPRPM for approval. Change orders with these subcodes will need to be routed to OPRPM for approval.

Freeze vendor name on payment when payment is released

The system will capture the vendor name at the time the payment is released. If the vendor name is modified in FMIS after the payment has been released, ePurchasing will

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still have the name at the time the payment was released. This is to identify who the payment was made to.

Remove access to 'edit' on submitted POs for the Central Procurement role

In order for Central Procurement (OPRPM) to make changes to submitted purchase orders, the document must be denied. Once the purchase order has been denied, Central Procurement can edit, submit and approve the purchase order.

Fix the menu vendor search (Netscape)

The vendor Search option on the main menu was not working using Netscape as the browser. This has been fixed.