



College Financial System User Procedure

Title:

Enter Standard and One-Time Notes (Using AutoCreate)

Description:

Standard notes can be used on numerous Purchase Orders and may not be changed. One-Time notes can be used once and may be changed. These notes can be entered at the header or line level of the Purchase Order. Use this procedure for entering Standard and One-Time notes while in the AutoCreate function.

College Financial System (CFS) Prerequisites:

- *A Purchase Order that you have created (either approved or not approved)*
- *System Navigation skills are required.*
- *The appropriate responsibility to create Purchase Orders.*

<i>Menu Path</i>
Autocreate

Window Name:

AutoCreate to Purchase Orders

Oracle Applications - MOCOD (CFSM)

AutoCreate to Purchase Orders (MOCOD) - 163135

PO, Rev: 163135 0 Type: Standard Contract Created: 26-FEB-2002

Supplier: RYCOM CORP Site: PHOENIX Contact:

Ship-To: DO Bill-To: DO AP Currency: USD

Buyer: ROUSE, NICOLAS Status: Incomplete Total: 1,509.00

Attachments


Item	Type	Item	Rev	Category	Description	UOM	Quant
1	Goods		207.00		18GB SCSI U160 10K	EACH	3
2	Goods		207.00		256MB PC100 DIMM	EACH	2
3	Goods		207.00		Adaptec 2100S U160	EACH	1
4	Svcs Dollars		962.00		taxes	US D	113.00

Item: 18GB SCSI U160 10K RPM Seagate 318406LC Hard drive

Buttons: Currency... Terms Shipments Approve...

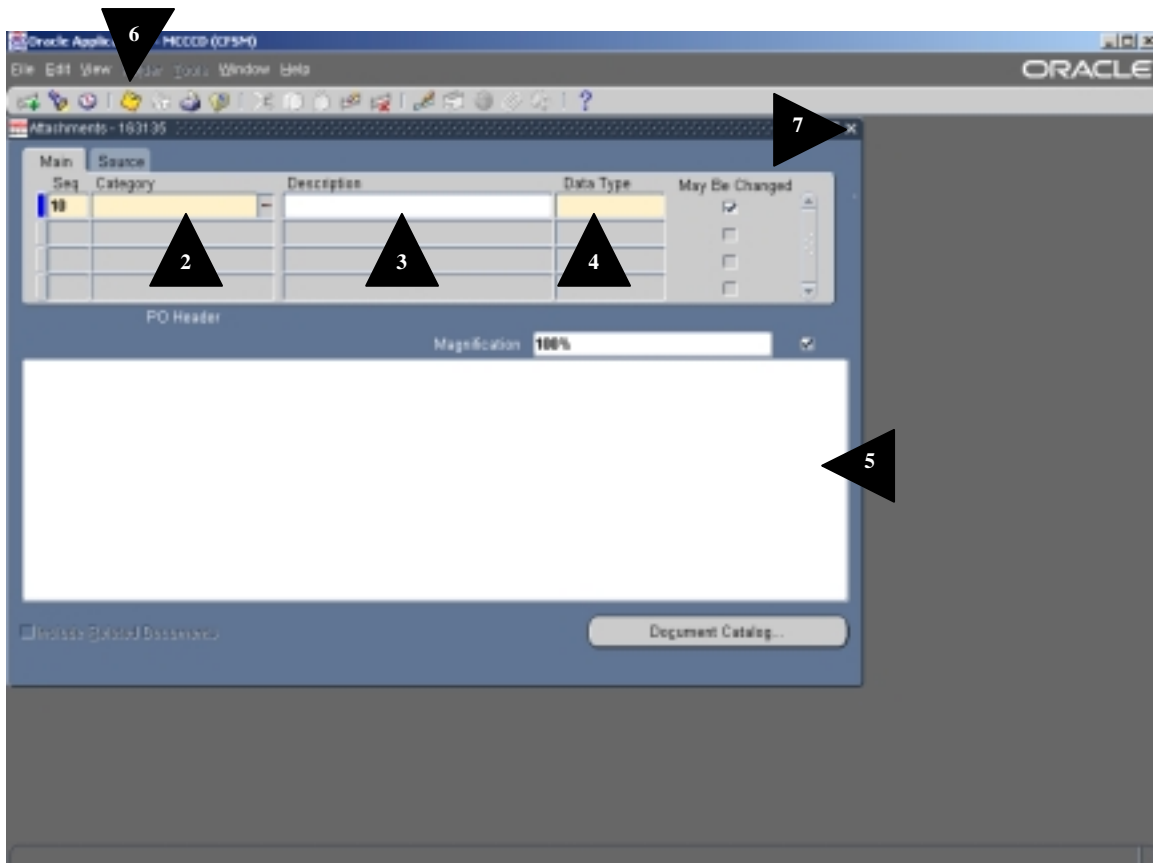
During AutoCreation of Purchase Orders, Standard or One-Time notes may be added to the Purchase Order. These notes will print out on the Purchase Order depending whether the notes are placed at the “header” or “line” level. You will follow the instructions to AutoCreate the Purchase Order in the CFS User Procedure Guide entitled “Autocreating a PO from a Requisition.” After you have selected the requisition line(s) you are creating the Purchase Order from, and have clicked the “Automatic” button, you will be taken to this window.

1. Click on the Attachments  button.

 **Note:** You must click within a field in the header to add a note to the header before clicking the “Attachments” button. You must click within a field in a specific line to add a note to the line before clicking the “Attachments” button.

Window Name:


Attachments



The following steps will show you how to enter a “One-Time” Note on the Purchase Order header or line.


Field Name	Description/Action
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2. Category	Select the category from the list of values.
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 **Note:** Below the “Category” field in white letters, you will notice the text “PO Header or PO Line” which lets you know that you are entering the note for the header or line.

3. Description	Enter a short description for the One-Time note.
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4. Data Type	Select the data type from the list of values.
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 **Note:** If this is a note that contains less than 2,000 characters, select “Short Text” from the list of values. If it is longer, select “Long Text.”

5. Enter the contents of the One-Time note here.
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 **Note:** As a general rule, you may want to insert a blank line or two above and below the contents of the “One-Time” note.

Field Name	Description/Action
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6. Click the save  button to save the note.
7. Click “X” to close the window and return to the “AutoCreate to Purchase Orders” window.

Window Name:

AutoCreate to Purchase Orders

The screenshot shows the Oracle Applications interface for 'AutoCreate to Purchase Orders'. The window title is 'Oracle Applications - POCCB (CP5M)'. The main form displays the following header information:


PO Rev	163136	0	Type	Standard P	Created	26 FEB 2002
Supplier	KAWAMBE OMOV		Site	PHOENIX	Contact	
Ship-To	00		Bill-To	00-AP	Currency	USD
Buyer	ROUSE, NICOLAS		Status	Incomplete	Total	1,200.00

Below the header is a table with the following data:

Line	Type	Item	Rev	Category	Description	UOM	Quant
1	Dollars		961.00		(Contract for Profess	US D	1200

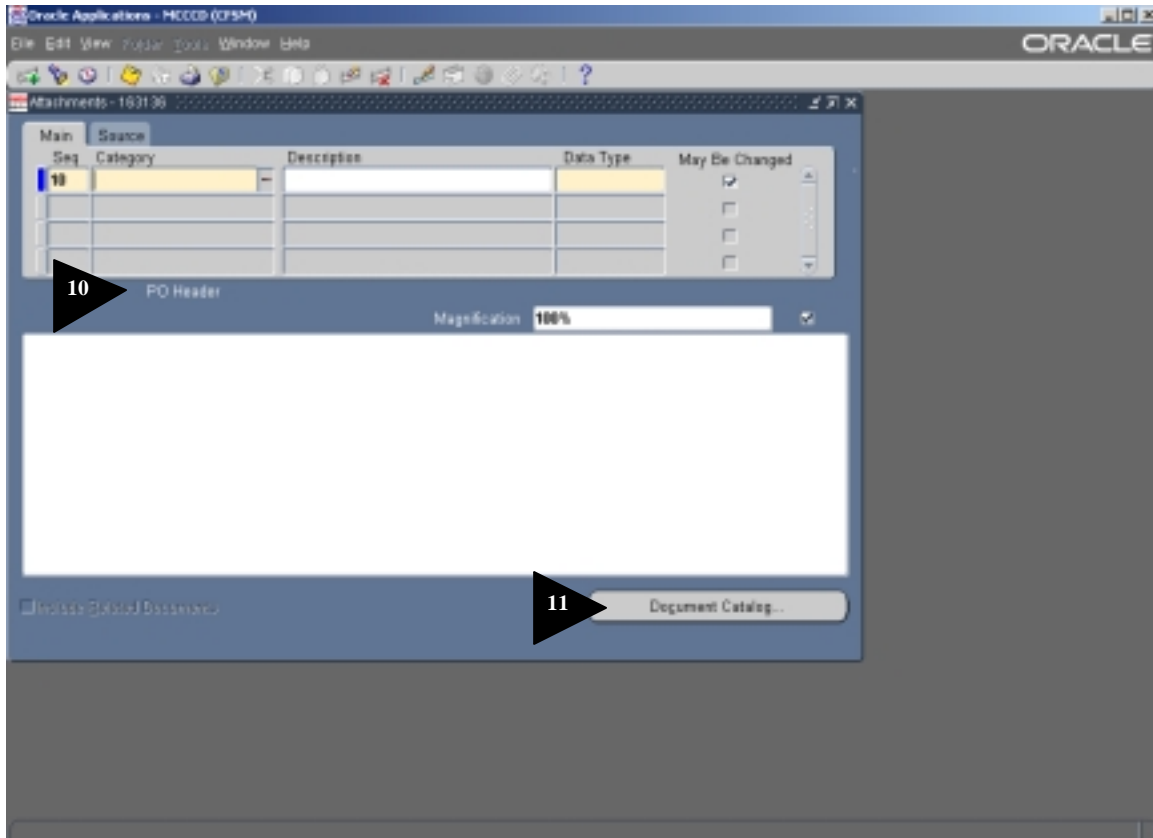
Callout box 8 points to the 'Type' field in the table, and callout box 9 points to the 'Attachments' button (represented by a paperclip icon) at the bottom of the form.

Now you will learn how to enter standard notes on the Purchase Order header and Purchase Order line. Make sure that if you are entering a Standard note for the header to click within a field up in the header, and if you are entering a Standard note for a line, click within a field on the Purchase Order line.

8. Click within a field in the Purchase Order header or Purchase Order line (depending where you want to enter the note).
9. Click on the Attachments  button.

Window Name:

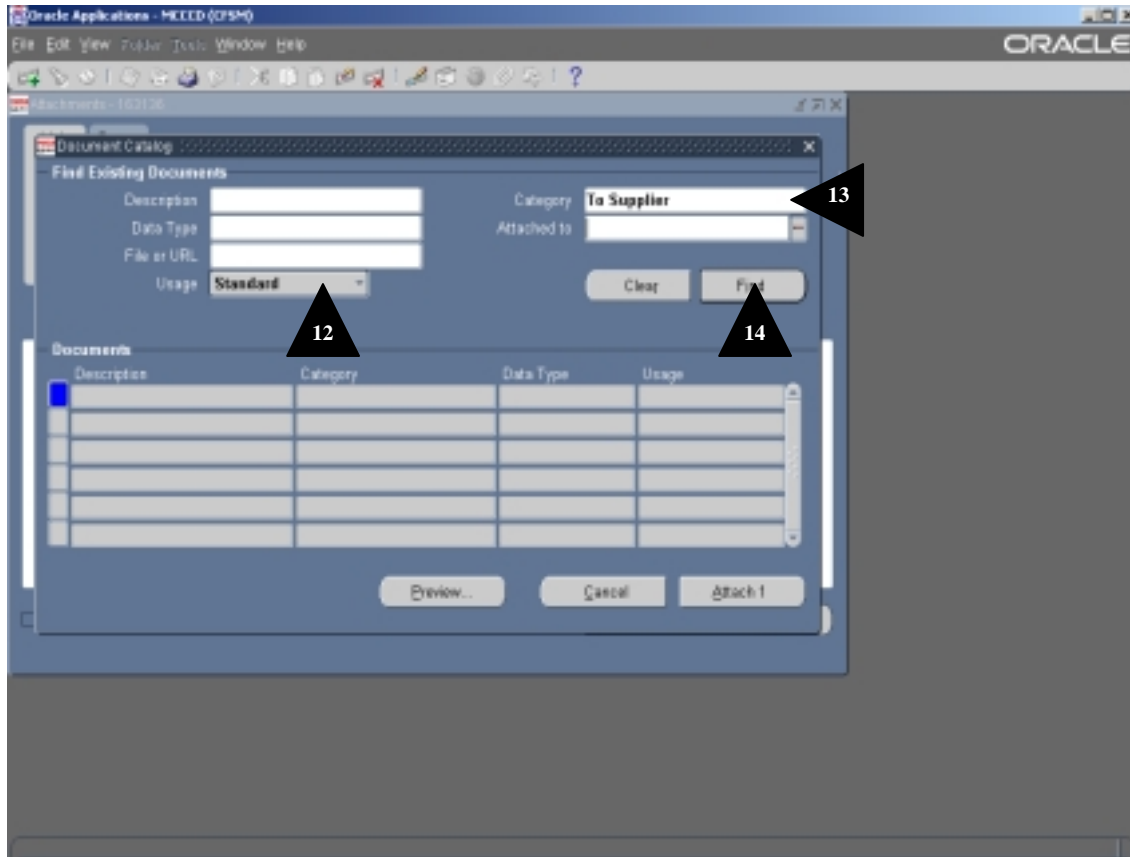
Attachments



- 10. Verify that you are in the “PO Header” or “PO Line.”
- 11. Click on the **DOCUMENT CATALOG** button.

Window Name:

Document Catalog



In order to enter Standard notes on a Purchase Order header or line, you must go into the document catalog. Below are the steps to take to attach a Standard note to the Purchase Order header or line.

Field Name	Description/Action
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12. Usage	Select the usage from the drop-down menu.
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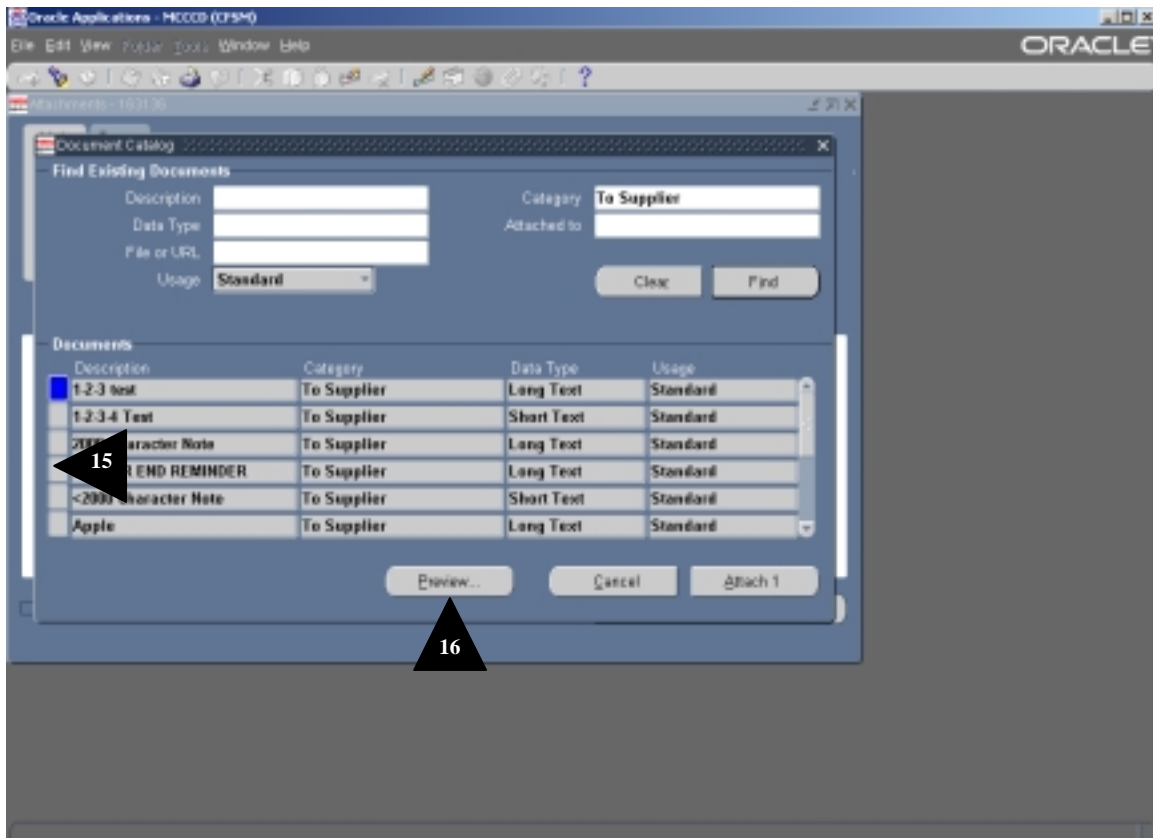
 **Note:** For Standard notes, select “Standard.”

13. Category	Select the category from the list of values.
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 **Note:** For Standard notes to suppliers, select “To Suppliers.”


14.	Click FIND to display all Standard notes to suppliers.
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Window Name:
Document Catalog



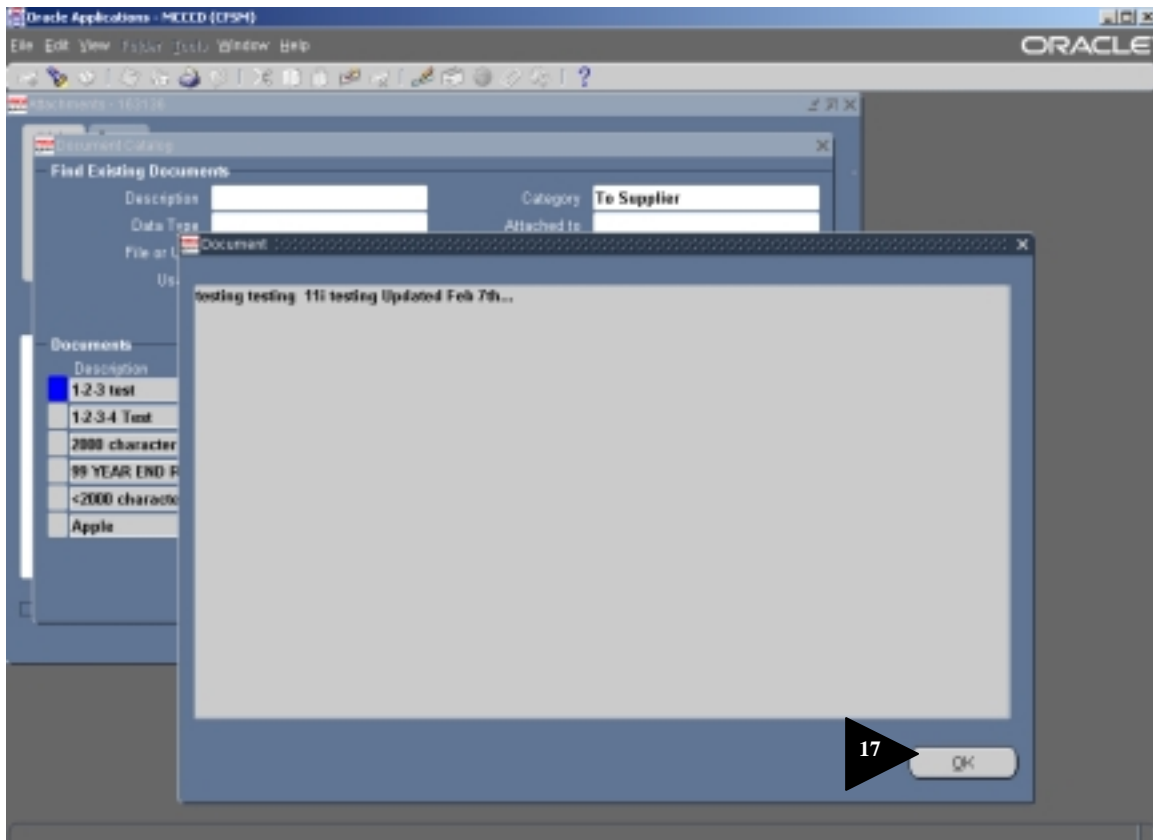
The Standard notes will appear in the “Documents” zone in the document catalog window. There are two ways in which you may preview the notes prior to attaching them to the Purchase Order header or line.

15. Click on the field to the left of the “Description” field, and the “Document” window will automatically open (this previews the note).
16. Click within any of the fields on the note you want to preview, then click the **PREVIEW...** button.

 **Note:** If you know what the note says, and you want to attach the note to the header or line, you may click in any field on the line of the note you would like, then click the “ATTACH 1” button.

Window Name:

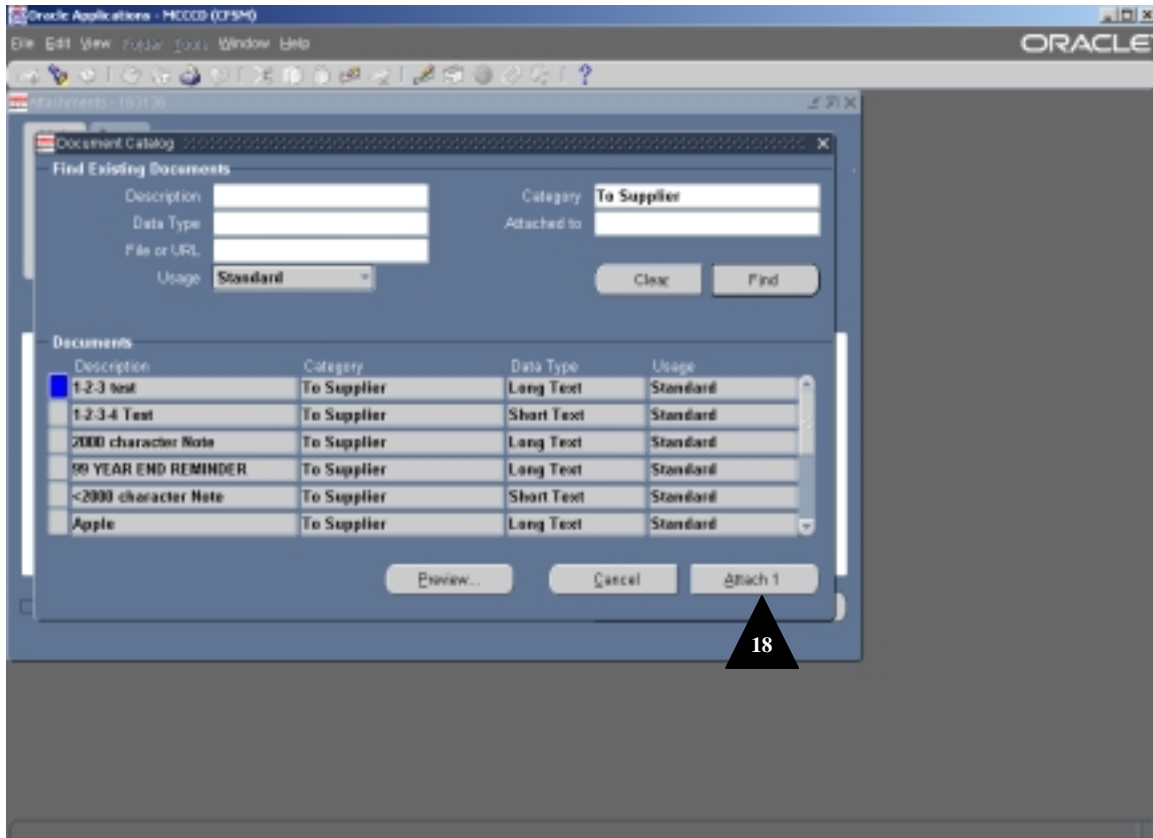
Document



A “Document” window will appear once you have selected the Standard note that you wanted to preview.

17. Click the **OK** button to get back to the Document Catalog.

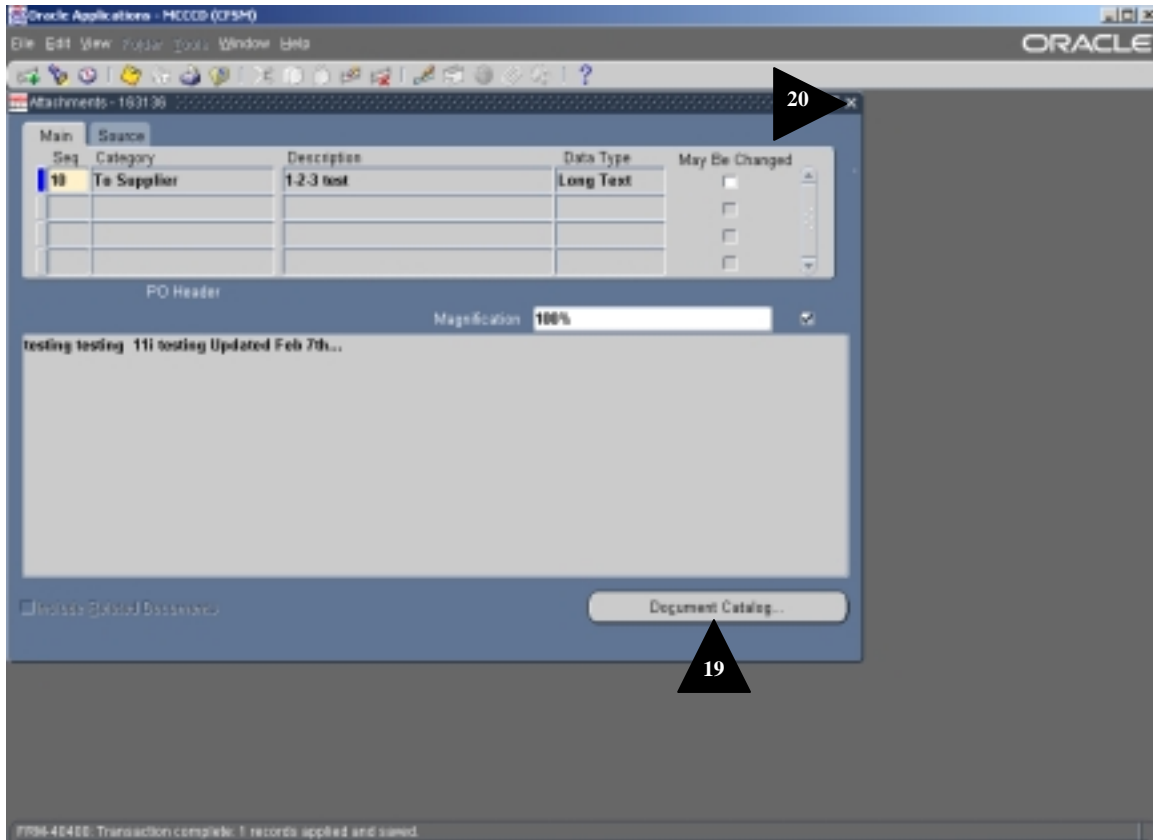
Window Name:
Document Catalog



18. Once you have previewed the Standard note and are ready to attach it to the Purchase Order header or line, make sure the field to the left of “Description” is highlighted (blue), then click the **ATTACH 1** button.

Window Name:

Attachments



You will be returned to the “Attachments” window, and the Standard note will automatically be saved to the Purchase Order header or line.

19. If you wish to enter more Standard notes to the Purchase Order header or line, click on the **DOCUMENT CATALOG** button and repeat steps 12-18.
20. If you are finished entering Standard notes to the Purchase Order header or line, click on the “X” in the upper right corner of the “Attachments” window to get back to the “AutoCreate to Purchase Orders” window.



End of procedure