

2010 Purchasing Webinar – Q & A

Here are the answers to the questions you sent through the chat box during the Purchasing webinar held on Thursday, May 20, 2010. If you have any additional questions, please feel free to email your Customer Care Representative.

Q: Where is the "overdue" status set?

A: The overdue "status" is derived from the Delivery Date in the requisition. It is calculated by the software based on either the Delivery Days setup in the system or the Vendor record. It can be changed by the user.

Q: Do you plan to allow attachments to be seen from the Approve Requisitions activity?

A: Funny you should ask. In the next release, we have made some changes to the Approve Requisitions activity that we think you are going to really like.

NEW FEATURE ALERT. In release 10.03, the Approve Requisitions activity is going to have two new features: Pending Approvals and Quick Links. "Pending Approvals" is a new field on the search page of the Approvals activity that displays the number of requisitions awaiting your approval. Quick Links are "links" to other records. When you click on a quick link, Escape Online opens the record (with all your appropriate permissions) in another tab on the form you are on. You don't have to go to another activity. Make sure you sign up for the 10.03 Release Review or at least watch Terri and Leslie's Top 10 to learn more about this new feature. If you are not on our list for notification of release reviews, [please join in](#).

Q: Sometimes a requisition status says Ready for Payment but the requisition has already been paid. How do we complete these?

A: Generally this occurs when the person who created the payment didn't mark it as a final payment. Marking a payment as final completes the requisition. If the requisition should have been completed but someone forgot or didn't know to mark the Final Payment flag, then use the Manual Complete task in the requisition to set the status to Complete.

Q: Is it possible to have the requisition number print on the PO change notice?

A: The requisition number does not print on Escape's standard change notice. If you are using the standard change notice and would like to add this to the form, you would need to create an incident and allow the request to go through the review process. If you are using a custom change notice, then you can talk directly to your Escape Customer Care representative to request the change. Note, however, there is a charge for changing custom reports.

Before you request the change, though, note that the PO number is on every search form the requisition number is on. In fact, many of the activities have a Reference Number field on the search page where you can enter EITHER the requisition number or the PO number and Escape Online will search for all documents that match.

Q: Is it possible to add the account string on ReqPay02?

A: The Requisition Listing (ReqPay02) already displays the account string. In addition, there is a CR (7905) requesting the account components be added to the search criteria. If you are interested in adding your name to the list of customers requesting this change, please contact Escape Customer Care.

Q: Is there a tab or link to see which budget **account** was used for the payment?

A: In the Vendor record, on the Payments tab, there is a quick link to the payment next to the Invoice field. If you have the appropriate permissions, you will see this link. Otherwise, you can use the link to the requisition on the Requisition tab. If accounts were added to a payment that was not in the requisition, they will be added to the requisition once the payment is in the paid status.

Q: Why is it that once the requisition is beyond the Approved status, the vendor information is locked and cannot be changed? What is the point of retaining old address information in the vendor file if it is always available on the electronic copy and printed versions of purchase orders?

A: That's a very good question! It is really a district decision on how to handle addresses. We recommend keeping the historical addresses because a requisition could be unprinted or returned to the Open status, and the vendor information could be changed at that point. Escape Online's standard is that keeping historical information ensures that changes that could affect other records or processes are documented in one place for easy reference.