

## PO.020.810 – ADDING/MAINTAINING STANDARD COMMENT TYPES AND STANDARD COMMENTS

|                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Purpose</b>                   | <ul style="list-style-type: none"> <li>To create a Standard Comment Type.</li> <li>To create a Standard Comment.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Description</b>               | <p>Standard Comment Types are used to organize Standard Comments, and Standard Comments provide an efficient way to add frequently used information to purchase orders.</p> <p>Examples of standard comments are EEOC Statement and/or Terms &amp; Conditions.</p>                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Security Role</b>             | <b>BOR_PO_SETUP_CONFIG</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Dependencies/ Constraints</b> | None                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Additional Information</b>    | <p>If institutions would like a Standard Comment to default on all purchase orders, users are asked to please submit an ITS helpdesk ticket to assign the Standard Comment to the Purchasing Definition.</p> <p>However, the Purchasing Definition only allows for one (1) Standard Comment to default for the entire business unit. If users would like to add further comments to the purchase order, these comments can be manually added whenever they are needed.</p> <p>If users would like the Standard Comments to display on the printed version of the purchase order, they must check Print BU Comments on the Run Control when they dispatch the PO.</p> |

## **Procedure**

Below are step by step instructions on how to create a new Standard Comment Type.

**Note:** *The Standard Comment Type must be created before a Standard Comment is created.*

| <b>Step</b> | <b>Action</b>                                                                                                                        |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------|
| 1.          | Click the <b>NavBar</b> icon.                                                                                                        |
| 2.          | Click the <b>Menu</b> icon.                                                                                                          |
| 3.          | Click the <b>Set Up Financials/Supply Chain</b> link.                                                                                |
| 4.          | Click the <b>Product Related</b> link.                                                                                               |
| 5.          | Click the <b>Procurement Options</b> link.                                                                                           |
| 6.          | Click the <b>Purchasing</b> link.                                                                                                    |
| 7.          | Click the <b>Standard Comment Type</b> link.                                                                                         |
| 8.          | Click the <b>Add a New Value</b> tab.                                                                                                |
| 9.          | Enter the business unit in the <b>SetID</b> field.                                                                                   |
| 10.         | Enter a <b>Standard Comment Type</b> code.<br><br><i><b>Note:</b> The system limits the name to three (3) letters or characters.</i> |
| 11.         | Click the <b>Add</b> button. The system navigates to the Standard Comment Type page.                                                 |
| 12.         | Click the plus (+) button to add a new effective dated row.                                                                          |
| 13.         | Verify the <b>Effective Date</b> is correct.                                                                                         |
| 14.         | Enter a description for the Comment Type in the <b>Description</b> field.                                                            |
| 15.         | Verify " <b>Active</b> " is selected from the <b>Status</b> menu.                                                                    |
| 16.         | Enter a Short Description in the <b>Short Desc</b> field.                                                                            |
| 17.         | Click <b>Save</b> .                                                                                                                  |

## Procedure

Below are step by step instructions on how to add a new Standard Comment.

| Step | Action                                                                                                                                    |
|------|-------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Click the <b>NavBar</b> icon.                                                                                                             |
| 2.   | Click the <b>Menu</b> icon.                                                                                                               |
| 3.   | Click the <b>Set Up Financials/Supply Chain</b> link.                                                                                     |
| 4.   | Click the <b>Product Related</b> link.                                                                                                    |
| 5.   | Click the <b>Procurement Options</b> link.                                                                                                |
| 6.   | Click the <b>Purchasing</b> link.                                                                                                         |
| 7.   | Click on <b>Standard Comments</b> .                                                                                                       |
| 8.   | Click the <b>Add a New Value</b> tab.                                                                                                     |
| 9.   | Enter or search for the institution's <b>SetID</b> .                                                                                      |
| 10.  | Search for a <b>Standard Comment Type</b> .<br><br><i>Note: Any code may be used for the comment.</i>                                     |
| 11.  | Enter a <b>Standard Comment ID</b> .                                                                                                      |
| 12.  | Click the <b>Add</b> button. The system navigates to the Standard Comments page.                                                          |
| 13.  | Click the plus (+) button to add a new effective dated row.                                                                               |
| 14.  | Verify the <b>Effective Date</b> is correct.                                                                                              |
| 15.  | Select " <b>Active</b> " from the <b>Status</b> menu.                                                                                     |
| 16.  | Enter a <b>Description</b> for the Comment Type.                                                                                          |
| 17.  | Press the <b>[Tab]</b> key. The Short Description populates from the entered Description. The Short Description may be edited, if needed. |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 18.  | <p>Enter the desired text for the Standard Comment. For example, a comment for a TNC (Terms and Conditions) Comment Type could be something like:</p> <ul style="list-style-type: none"> <li>• “The University Terms and Conditions are applicable to this order. They can be viewed in full at (insert website here).</li> </ul> <p>By accepting this Purchase Order, Vendor/contractor agrees to invoice the user agency according to the purchase order. Failure to invoice as indicated in these Terms and Conditions may result in Payment Delays.”</p> <p>A comment for DEL (Delivery) Comment Type could be something like:</p> <ul style="list-style-type: none"> <li>• Deliveries accepted Monday - Thursday, 8:00 a.m. - 4:00 p.m. NO FRIDAY OR WEEKEND DELIVERIES ACCEPTED.</li> </ul> |
| 19.  | <p>Click the <b>Save</b> button.</p> <p><i><b>Note:</b> If the institution would like a Standard Comment to default to all purchase orders, please submit a ticket to the ITS Helpdesk. Specify the Standard Comment Type and Standard Comment to be added in the request. ITS will confirm when Standard Comments are setup and ready for use.</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                           |

Below are step by step instructions on how to modify an existing Standard Comment.

**Note:** Users can modify the Standard Comments at any time and do not need ITS assistance.

| Step | Action                                                                                                                                               |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Click the <b>NavBar</b> icon.                                                                                                                        |
| 2.   | Click the <b>Menu</b> icon.                                                                                                                          |
| 3.   | Click the <b>Set Up Financials/Supply Chain</b> link.                                                                                                |
| 4.   | Click the <b>Product Related</b> link.                                                                                                               |
| 5.   | Click the <b>Procurement Options</b> link.                                                                                                           |
| 6.   | Click the <b>Purchasing</b> link.                                                                                                                    |
| 7.   | Click on <b>Standard Comments</b> .                                                                                                                  |
| 8.   | On the Find Existing Value tab, enter or search for an existing <b>Standard Comment</b> . The system navigates to the Standard Comments page.        |
| 9.   | Click the plus (+) button to add a new effective dated row.                                                                                          |
| 10.  | Verify the <b>Effective Date</b> is correct.                                                                                                         |
| 11.  | Modify any of the following fields: <ul style="list-style-type: none"> <li>• Description</li> <li>• Short Description</li> <li>• Comments</li> </ul> |
| 12.  | Click the <b>Save</b> button.                                                                                                                        |