<table>
<thead>
<tr>
<th>Course Agenda</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson 1: The Purchase Order Document</td>
<td>8</td>
</tr>
<tr>
<td>Lesson 2: Working With the Purchase Order Document</td>
<td>54</td>
</tr>
<tr>
<td>Course Summary</td>
<td>99</td>
</tr>
</tbody>
</table>
Welcome to the EBS training module on Purchase Orders. The material contained within will enable you to work more effectively by showing how the Purchase Order document will display and process transaction and workflow data.
Please be sure to have already completed the following courses before taking this course on Purchase Orders:

- FRS-N100 Intro To Enterprise Business Systems
- EBS-N400 Use and Run Standard Reports
- EBS-N200 Intro To The Finance System
- EBS-N203 Accounting Line
- EBS-N206 Financial Transactions (E-Docs)
- EBS N209 E Doc Components
- EBS-N212 Processing Transaction E-Docs
After completing this course, you will be able to:

- Search, review and display Purchase Order information.
- Review notes and attachments.
- View related documents.
- Review Purchase Order workflow.
- Obtain Purchase Order status.
- View payment history.
- Retrieve other reference information associated with a Purchase Order.
After completing this course, you must complete the assessment in Angel to receive credit.
TERMS TO COME TO KNOW...

- Purchase Order (PO)
- Contract Manager (CM)
- Automatic Purchase Order (APO)
- Payment Request (PREQ)
LESSON 1: THE PURCHASE ORDER DOCUMENT
Lesson Objectives

After completing this lesson, you will be able to:

- Identify the Purchase Order document.
- Identify the types of information contained in a Purchase Order.
- Identify roles in Purchase Order workflow.
- Explain the basic purchasing process.
- Define the various types of Purchase Order actions.
What is a Purchase Order?

A Purchase Order is a contract between Michigan State University (MSU) and a vendor who will provide specific goods and/or services to MSU. It is the system output of an approved requisition, including updates made by the Contract Manager (Purchasing Staff Member).
<table>
<thead>
<tr>
<th>Where does a Purchase Order come from?</th>
</tr>
</thead>
</table>

- Purchase Orders are the financial system documents created from information contained on a requisition.
- Purchase Orders are automatically generated by the financial system after a requisition is submitted and approved and a Contract Manager has been assigned by Purchasing.
Under certain conditions specified by business rules, fully approved requisitions may become Purchase Orders automatically with no need for additional processing by a Contract Manager. For example, a vendor contract must be selected on the requisition. The vendor contract contains a dollar limit that allows the APO function.
| Where does a Purchase Order go? |

Like all other documents in the financial system, a Purchase Order goes through a workflow that updates the status of the document. Further information can be obtained by looking at the status of the Purchase Order. The three most used statuses are:

- **In Process/Unapproved**: The financial system generates an unapproved Purchase Order automatically after a Contract Manager is assigned to the approved requisition.
- **Open**: After all necessary approvals during workflow have been granted, the Purchase Order reaches open status. The Purchase Order is transmitted to the vendor, and payments can now be made.
- **Closed**: A Purchase Order can reach closed status by either the Accounts Payable Processor or by a Contract Manager manually closing the Purchase Order. It can also reach closed status if all the items have been paid.
Communicating With Purchasing

On the previous slide, we briefly identified that a Purchase Order goes through many steps and statuses during workflow. It is important to know that the Purchase Order document can still easily be located during this time.

- With e-docs, you will be able to locate your Purchase Order document at anytime during workflow.
- You will know who is working on your Purchase Order within the Purchasing Department because the e-doc contains the name of the Contract Manager.
- You can easily contact Purchasing to make changes through the financial system (notes and attachments). If an emergency arises, call Purchasing.
### Vendor Information on a Purchase Order

- All suggested vendor information from the requisition (if provided).
- If vendor information is blank, the Contract Manager must provide this prior to submission.
- If the Purchase Order requires a quote, the Contract Manager supplies the vendor information once bidding has ended.
- If the awarded vendor does not exist in the vendor database, the Contract Manager will create the vendor.
The Purchase Order document has 12 document-specific tabs that contain the Purchase Order information. Remember that the Purchase Order gets most of its information from the requisition, so much of the information will be the same. We will discuss each tab in the following slides.
The first tab on the Purchase Order document is Document Overview. This tab provides general document information of the Purchase Order such as the document description, total amount of the Purchase Order, who the document is assigned to in the Purchasing department and status changes.
Next is the Delivery tab, which shows the delivery information that was given to the vendor including the Final Delivery information and Receiving Address, as well as any delivery instructions.

<table>
<thead>
<tr>
<th>Final Delivery</th>
<th>Receiving Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Type</td>
<td>Final Delivery</td>
</tr>
<tr>
<td>City</td>
<td>State</td>
</tr>
<tr>
<td>Address 1</td>
<td>Address 2</td>
</tr>
<tr>
<td>Name</td>
<td>Phone Number</td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
</tbody>
</table>

Delivery Instructions:

Receiving Address:

- Name:
- Address 1:
- Address 2:
- City, State, Zip:
- Phone Number:
- Email:
Next is the Vendor tab, which shows the vendor information associated with the order such as vendor name and address information, along with payment terms and how this vendor was chosen. In the example below, the vendor was chosen as a result of competitive bid.
The Stipulations tab of the Purchase Order document indicates additional terms and conditions (T&Cs) of the Purchase Order that vary depending on the purchase.
The Items Tab shows all the item information from the requisition including what was ordered, accounting information, additional charges, and the grand total of items ordered.

<table>
<thead>
<tr>
<th>Item ID</th>
<th>Description</th>
<th>Quantity</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Computer</td>
<td>10</td>
<td>100.00</td>
<td>1000.00</td>
</tr>
<tr>
<td>002</td>
<td>Printer</td>
<td>5</td>
<td>200.00</td>
<td>1000.00</td>
</tr>
<tr>
<td>003</td>
<td>Monitor</td>
<td>2</td>
<td>300.00</td>
<td>600.00</td>
</tr>
</tbody>
</table>
The capital asset tab will be populated with information if any of the items on the Purchase Order are capital asset items. The capital asset tab provides information about the asset that was purchased such as the asset type, location, cost and description.

<table>
<thead>
<tr>
<th>Capital Asset Number</th>
<th>Capital Asset Type</th>
<th>COMMODITY CODE</th>
<th>Unit Price</th>
<th>Extended Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Building Improvement</td>
<td>Commercial and office building renovation and repair</td>
<td>$300,000.00</td>
<td>$300,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>MODIFY EXISTING</td>
<td>$300,000.00</td>
<td>$300,000.00</td>
</tr>
</tbody>
</table>
On the Payment Information tab, we can find information regarding payment arrangements that have been set up for the selected vendor. Scheduled payment information can also be found here.
The Additional Institutional Info tab is where we find information about the origin of the Purchase Order, such as the financial system user that submitted the requisition. We also find here the method of delivery of the Purchase Order to the vendor. In addition, the Cost Source is identified by Purchasing, which indicates the variance allowed for e-invoicing.
The Quote tab will identify the vendors and status of bids transmitted and or received if Purchasing conducted a bid on the items.
On the Account Summary tab, we find a breakdown of the accounts that were charged on the Purchase Order, along with the items and amounts that were charged to that account.
The View Related Documents tab provides a location for us to find all e-docs related to the Purchase Order, such as the original requisition and payment requests. We can open and access all related documents from this tab. You can also view within this tab all notes that were added to those documents by clicking show.

<table>
<thead>
<tr>
<th>View Related Documents</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Related Documents</td>
<td></td>
</tr>
<tr>
<td>Requisition</td>
<td></td>
</tr>
<tr>
<td>2010-01-24 12:45 PM</td>
<td>2728</td>
</tr>
<tr>
<td>User</td>
<td></td>
</tr>
<tr>
<td>Requisition did not become an APS because requisition total was greater than the APS limit.</td>
<td></td>
</tr>
<tr>
<td>Paid Panel Request</td>
<td></td>
</tr>
<tr>
<td>1/1/2010</td>
<td>1531</td>
</tr>
<tr>
<td>The Status</td>
<td></td>
</tr>
</tbody>
</table>
On the View Payment History tab, we can find out if any payments have been made to the vendor, as well as the pay date, amount and the status of the payment request.
The General Ledger Pending Entries tab shows the accounting transaction information for the Purchase Order that will be posted to the general ledger (GL). Once the Purchase Order is approved and the document status is final, the nightly batch will post these entries to the GL and the pending entries will be removed from this tab (see image below). This information is taken from the accounting line.

Now that you are familiar with the purchase order document, let’s take a look at the document workflow.
As the Purchase Order routes through standard workflow, there are key parties involved in the approval and notification process. The following slides will take a closer look at these parties and how they impact or are impacted by a Purchase Order.
Submitting

1) Financial system user submits a requisition for departmental approval.

2) Once approved, the Contract Manager is assigned and an unapproved Purchase Order is created.

3) The financial system closes the requisition document.

4) Purchase Order is in process and shows an unapproved Purchase Order#.

5) Contract Manager processes and approves the Purchase Order.
6) The Purchase Order routes for additional necessary approvals and is then sent to the vendor.

7) Purchase Order status changes to open. Payments can now be made to the vendor.

8) Vendor fills Purchase Order agreement and submits invoice to Accounts Payable.

9) Accounts Payable staff initiates a payment request to process payment. If needed, Accounts Payable creates a credit memo.

10) A payment request is created against the invoice.
11) A payment request is routed to the fiscal officer for approval. If the fiscal officer does not act on it before the pay date, the financial system will auto-approve the payment request.

12) When the payment request is approved, it is routed to the Pre-Disbursement Processor (PDP) for payment to be processed.

13) Payment is sent to the vendor. When all the conditions specified by the Purchase Order have been satisfied, the Purchase Order status is changed to closed, and the process is complete.
The Contract Manager represents the Purchasing department's approval. Approval at this workflow node indicates the following has taken place:

- The Purchase Order has been processed and approved.
- The bidding process for quotes has occurred.
- Vendor selection has been finalized.
- Each line item is identified with the correct commodity code.

The Contract Manager will transmit the PO to the vendor after the rest of the approvals on the PU have taken place. The printing takes place after all the approvals, so when the Contract Manager approves it, it may or may not be transmitted immediately upon approval, depending on the other approvals needed.

Note: The printed .PDF version of the Purchase Order is available through the Doc Viewer application.
The Commodity Reviewer is representative of specialized approvals that occur based on item classifications. The Purchase Order will be routed to the commodity reviewer if a commodity indicates approval is needed. For example, radioactive commodities will route to Office of Radiation, Chemical, Biological Safety (ORCBS) for approval. The Commodity Reviewer can only approve or disapprove the Purchase Order; they are not able to edit the Purchase Order.
The Contracts and Grants processor is representative of Contracts and Grants verification of the awarded funding. A Purchase Order routes here if a Contract and Grants account is used. The Contracts and Grants Processor has the ability to only approve or disapprove the Purchase Order.
Since MSU does not validate available funds on accounts before processing a Purchase Order, MSU will not be routing the Purchase Order to the Budget Reviewer at go-live.
If the vendor on the Purchase Order is a foreign vendor or an employee of MSU, then the Purchase Order will route to the Tax Manager workgroup for review and approval.
After a Purchase Order has been initiated, authorized users may perform a variety of actions on it (shown on right). Though each of the actions generates a new document and number, the Purchase Order number does not change.

- Purchase Order Amendment
- Purchase Order Retransmit
- Purchase Order Void
- Purchase Order Close
- Purchase Order Reopen
- Purchase Order Payment Hold
- Purchase Order Release Payment Hold
- Purchase Order Split
**P O U R C H A S E  O R D E R  A C T I O N S**

**Purchase Order Amend (POA)**
- Amend allows changes or modifications to be made on the Purchase Order.
- Purchasing can amend a Purchase Order that is in open status and does not have any pending payment request.
- When a POA is submitted, the fiscal officer receives an FYI in their action list.
- Note: Amendments for accounting line changes will rarely be performed as account changes should be made on the payment request. Object code changes on the payment request are discouraged.

**Purchase Order Re-transmit (PORT)**
- Purchasing can re-transmit the entire Purchase Order or selected line items.

**Purchase Order Void (POV)**
- Void cancels the Purchase Order and disencumbers all related funds.
- The void action can only be used on a Purchase Order that has no payments made against it.

**Purchase Order Close (POC)**
- Purchase Orders can be closed by:
  - Purchasing selects a button on the Purchase Order document.
  - Automatic batch process occurs when all lines have been paid.
  - Accounts payable can close while processing a payment request.
- POC closes out any remaining items and disencumbers any outstanding funds.
P U R C H A S E  O R D E R  A C T I O N S

Purchase Order Re-open (POR)
- Purchase Orders can be reopened if they are closed prematurely during the document workflow.
- POR reopens the Purchase Order and re-encumbers available funds.

Purchase Order Payment Hold (POH)
- Purchasing can place a hold on a Purchase Order to stop all new payments from processing against the Purchase Order.
- Accounts Payable or fiscal officer can place a hold on a payment request to hold one payment.

Purchase Order Remove Payment Hold (PORH)
- Purchasing can remove a payment hold on a Purchase Order. Accounts Payable can remove a hold on a payment request.
- PORH refreshes the status of the Purchase Order to open so that payments can be made. An FYI is sent to Accounts Payable to indicate that the hold has been removed.

Purchase Order Split (POSP)
- Split may be used when an in-process Purchase Order contains items being purchased from multiple vendors.
At times during the life of a Purchase Order document, special situations arise which require a Purchase Order document to be processed in a non-routine manner. Examples of these instances will be covered in the following slides.
Sometimes a requisition document may contain MSU-defined sensitive items. Users can make a request to Purchasing using notes and attachments on the requisition that the requisition/Purchase Order be marked as sensitive data. It is the responsibility of Purchasing to evaluate and determine if a Purchase Order should be marked as sensitive data. Sensitive data can usually be grouped into four categories:

- Weapons
- Ammunition
- Animals
- Radioactive Material
Once Purchasing marks a Purchase Order as sensitive data (based on policy requirements), only the initiator and fiscal officer will be able to see the document. Purchasing, Accounts Payable, and any other workgroups with appropriate permissions will also have access to these documents. The financial system automatically filters all purchasing and accounts payable documents:

- Requisitions
- Purchase Orders
- Payment Requests
- Vendor Credit Memos
In special circumstances, payment against a Purchase Order may need to be held until the fiscal officer gives approval (remove the payment request from being auto-approved). This may happen when a Purchase Order is issued for construction or for a complex purchase that involves a large sum of money. This gives MSU the opportunity to properly review the project and approve payment once specific requirements are met. This is done through a payment request positive approval.

The payment request positive approval is a checkbox on the Purchase Order that the Contract Manager can select. Checking this box removes the auto-approve functionality for all payment requests against the Purchase Order. Units may request this through the notes section on the requisition.
Multiple choice: Select the correct answer.

When can payments be made to vendors listed on a Purchase Order?

A. After the requisition has been submitted.
B. When the Purchase Order is in open status.
C. When the Purchase Order is closed.
Multiple choice: Select the correct answer.

When can payments be made to vendors listed on a Purchase Order?

B. When the Purchase Order is in open status.
Multiple choice: Select the correct answer.

Where does the information contained on a Purchase Order come from?

A. The original requisition
B. Purchasing
C. Both A and B.
Multiple choice: Select the correct answer.

Where does the information contained on a Purchase Order come from?

C. Both A and B.
Fill in the blank: Select the correct answer.

When approved by the Contract Manager, the Purchase Order status changes to ______.

A. Open  
B. Closed  
C. Pending
Fill in the blank: Select the correct answer.

When approved by the Contract Manager, the Purchase Order status changes to ______.

A. Open
Fill in the blank: Select the correct answer.

________ ______ are automatically generated by the system when a requisition is approved.

A. Open Contract Orders
B. Unapproved Purchase Orders
C. Level Two Requisitions
Multiple choice: Select the correct answer.

_________ ________ are automatically generated by the system when a requisition is approved.

B. Unapproved Purchase Orders
LESSON 2: WORKING WITH THE PURCHASE ORDER DOCUMENT
Lesson Objectives

After completing this lesson, you will be able to:

- Search for a Purchase Order.
- Display a Purchase Order.
- Attach notes to a Purchase Order.
- Perform Ad-Hoc routing of Purchase Orders.
- View payment history.
- View related documents.
We have covered the basic information on the Purchase Order. We can now talk about searching for a Purchase Order in the financial system. Searching allows us to easily find Purchase Orders in the financial system at anytime during the workflow.
Searching for a Purchase Order is similar to searching for any other financial system document. The process begins by clicking on the Purchase Orders link under Custom Document Searches on the financial system Main Menu. In the next slide, we'll discuss the fields on the Purchase Order document search.
The Purchase Order search document is quite inclusive. There are 32 fields that can be used to filter and search for a Purchase Order. We will discuss these fields in more detail in the following slides.
**Type:** This is a searchable field whose selection determines the available search criteria based on document type. However, it automatically defaults to Purchase Order since we are using the Purchase Order document search.

**Initiator:** This field is of limited use when searching for purchase orders. Since purchase orders are initiated automatically by the financial system when requisitions are approved, the system is considered the initiator for purchase orders.
**Document/Notification ID:** This is the E-Doc number. A Purchase Order can have multiple e-docs based on how many revisions it has undergone. When searching by Purchase Order number, every associated e-doc will be found.

**Date Created From/Date Created To:** These date fields allow the user to search for Purchase Order that was created between certain dates.
**Document Description:** This field is used to search for a Purchase Order by the information that was placed in the document description. Initially copied from the requisition, this information can be changed by Purchasing.

**Organization Document Number:** This is a free-form field that can be filled in on the requisition or the Purchase Order. If this field was used and the organization document number is known, the number can be used to search for the purchase order.

**Purchase Order #:** If known, this can be used to quickly find that specific Purchase Order.
**Requisition #**: Use this field if you know the number of the requisition that generated the Purchase Order.

**Vendor #**: Allows you to search for Purchase Orders by vendor. Results will return all Purchase Orders containing this vendor number.

**Purchase Order Chart Code**: Identifies the chart of accounts with which a Purchase Order is associated. MS chart is the only available option at this time.
**Purchase Order Organization Code:** Search by the organization of the initiator of the requisition.

**Requestor Name:** The requestor is the same user that submitted the requisition. This field will return all Purchase Orders having this name listed in the ‘requested by’ field on the Purchase Order document.
**Assigned To User:** This field is used by Purchasing for internal use.

**Delivery Campus:** Use this field to return Purchase Order documents that will be sent to a particular campus. EL campus is the only available option at this time.
**Contract Manager.** Use this field in the search to return all Purchase Orders assigned to a specific Contract Manager.

**Previous Purchase Order #:** This field is used to find a purchase order by using the old legacy PO# without the prefix.
Purchase Order Last Transmit Date From/To. Use this field to help narrow the search to Purchase Orders transmitted to a vendor within a specified date range.

Date Required From/To: This field is used to help narrow the search to Purchase Orders with date required information within the delivery tab.
**Date Required Reason**: This field is searchable and will filter Purchase Order documents based on the date required reason within the delivery tab.

**Receiving Required**: MSU is currently not using this field.
Payment Request Positive Approval Required: This value has only three options (yes, no and both). This field is used to find Purchase Orders that were marked by purchasing for positive approval. This means that this field can be used to find Purchase Orders that are marked by Purchasing for positive approval, are not marked by purchasing for positive approval, or for both types.
**Purchase Order Status:** Use this criteria to select one, some or all statuses of a Purchase Order. Searching by this field will return all Purchase Order documents with the corresponding status. (Use the ctrl key to select multiple values.)
Return Current Documents Only: This field has only three selections (Yes, No and Both). To only search for documents that are current, select 'Yes.' To search for documents that are retired, select 'No.' To search for both types, select 'Both.'
**Chart Code:** This field is searchable and is used to select the chart of accounts you would like to search. Searching by this field will return all Purchase Orders assigned to a particular chart of accounts. MS is the only available option at this time.
Account Number: This field is searchable and looks for Purchase Orders using the specific account number entered here.
Organization Code: This field is searchable. Searching by this field will filter Purchase Order documents to return only those that have used an account associated with a particular org code.
**Ledger Document Type:** This field searches for documents by the type shown on the general ledger.
**Total Amount:** Use this field to search for Purchase Orders based on the total amount of the Purchase Order. Only the Purchase Orders that exactly match this value will be displayed in the search results.
**Search Result Type.** This field searches for Purchase Orders by workflow or document data.

- **Document Specific Data** shows information such as Vendor, Account Information, Org Code and Total Amount.
- **Workflow Data** shows the document status, initiator and date created.
**Name This Search:** This is a user-defined field that you can use to save your search criteria if you are going to be using it a lot. This way you don’t have to re-enter your search criteria every time. Use the drop-down at the top of the page to access your saved searches.
Once you have input all of your search criteria, clicking the search button at the bottom of the Lookup will return your search results. On the next slides, let’s take a look at the process of searching for a Purchase Order by vendor number.
Using the Magnifying Glass to Find Search Criteria

Sometimes when searching for a Purchase Order document, you may need to look up the value by which you would like to search. For example, if you wanted to search for Purchase Order documents by vendor number, you may want to search for the vendor first so you could find their number and then return the proper value. Then you could search for your Purchase Order. Features like this make finding Purchase Order documents much easier. Let's take a look.
Using the Magnifying Glass to Find Search Criteria

Clicking on the magnifying glass next to vendor number (below left) opens the vendor search lookup (below right). Here we will search for the vendor that we need to use to find our Purchase Order.
Using the Magnifying Glass to Find Search Criteria

Shown below are some of the results returned by the search on the previous slide. All vendors whose name begins with “a” will be returned. Click the return value link to bring the specified vendor back into the Purchase Order search Lookup.
Using the Magnifying Glass to Find Search Criteria

Below, you can see that the vendor number from our previous search has been placed into the Purchase Order search Lookup. We can now click the search button at the bottom of the Lookup to search for a Purchase Order using this vendor number as a filter.
Finding Results

Once the information about the Purchase Order document has been entered, you can run the search. A list of results like the one shown below is returned. When you have found the correct Purchase Order document, you can click on the document ID to open it and perform many actions on the document, such as attaching notes or files.
Now that we’ve practiced finding a Purchase Order document, we will now discuss some things that can be done with the Purchase Order document.

If you want someone to be directly informed of a Purchase Order document, you may want to use the Ad Hoc routing feature to send them the document as an FYI. This capability depends on your rights and privileges as a system user.
Keep in mind that attaching notes does not provide a notification to users unless a notification recipient is selected. If a notification recipient is selected, an action item will appear in the selected user’s action list telling them to review notes on this Purchase Order.
A very important point to remember is to never place confidential or sensitive information into a note or attachment! Notes and attachments cannot be hidden!

Notification Recipient vs. Ad Hoc Routing

- Ad Hoc routing sends the entire document to another financial system user for review.
- Notification Recipient notifies a financial system user of a particular note and/or attachment made on a document. Any document that is initiated from a requisition has this capability.
As an example, let's say we wanted to request an action from the Contract Manager. We could:

- Search and find the Purchase Order.
- In the notes, we make a request and add it to the Purchase Order document.
- Add the notification recipient by entering the net ID of the Contract Manager.
- Route the Purchase Order notes using the send button.

Let's take a look at this process on an actual document.
Study the image below.

- Notes are added by opening the Notes and Attachments tab of the Purchase Order document.
- Simply type in the note, attach any necessary files, and add the note to the document by clicking the add button.
- Once the note has been typed and added, you can search for and add the recipient.
Once you have sent a note, it will show up in the recipient’s action list in the Action Requested column.
Another important aspect of the Purchase Order are the payments made against it, and payment history.

- The View Payment History tab located inside the document provides the details of all payment requests and credit memos issued against the related Purchase Order.
- Once a Purchase Order reaches open status, Accounts Payable staff create a payment request to the appropriate vendor listed on the Purchase Order.
- Once payment requests have been submitted, any financial system user can search for the Purchase Order and view the payment history.
- The next slide shows the location of payment history information.
Simply click on the View Payment History tab to view the payment history information of the Purchase Order.
The payment request can be opened by clicking on the payment request number link. If a payment request has not been initiated, the Purchase Order will show no payment history. See below.

<table>
<thead>
<tr>
<th>Payment Request</th>
<th>Document Description</th>
<th>Document Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order</td>
<td>Departmental Approval</td>
<td>Approved</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>Scientific Equipment</td>
<td>Scientific</td>
</tr>
</tbody>
</table>

To view a payment request for a purchase order, click on the document link here.

The View Payment History tab shows the details of any payments that have been made against this purchase order.

Any document associated with the purchase order can be found in the View Related Documents tab.
Multiple choice: Select the correct answer.

What tab on the Purchase Order document would tell you if a vendor has been paid?

A. Quote tab.
B. Stipulations tab
C. Payment History tab
Multiple choice: Select the correct answer.

What tab on the Purchase Order document would tell you if a vendor has been paid?

C. Payment History tab
Multiple choice: Select the correct answer.

Who is responsible for making payments to vendors?
A. Accounts Payable Staff
B. Contract Manager
C. Fiscal Officer
Multiple choice: Select the correct answer.

Who is responsible for making payments to vendors?

A. Accounts Payable Staff
Fill in the blank: Select the correct answer.

A Purchase Order has a payment history only if a _______ has been submitted by Accounts Payable.

A. Payment Request
B. Credit Memo
C. Invoice
LESSON REVIEW: ANSWERS

Fill in the blank: Select the correct answer.

A Purchase Order has a payment history only if a _______ has been submitted by Accounts Payable.

A. Payment Request
CONCLUSION
Now that you have completed this course, you should be able to:

- Search, review and display Purchase Order information.
- Review notes and attachments.
- View related documents.
- Review Purchase Order workflow.
- Obtain Purchase Order status.
- View payment history.
- Retrieve other reference information associated with a Purchase Order.
When you have reached the last page of this course, please complete the course assessment.

**PLEASE NOTE:** You must complete the assessment in order to receive credit for completing the course.

When you submit your assessment, a message box will display with your score, along with information about how to review the detailed results of your assessment. Your score and the detailed results can help you gauge how well you have understood the content and whether it may be helpful to review the course.

You will be the only one with access to your score and assessment results in Angel.
Once you have completed the assessment, the following links will be available on the Lessons page in Angel:

**Evaluation**
Please complete the course evaluation. The evaluation can be completed in less than five minutes and allows you to share feedback that will help us improve the course.

**Completion Certificate**
Use this link if you would like to display a printable course completion certificate.

**Course Resources**
Use this link to access additional documentation and simulations pertaining to this course.
If you have questions that were not addressed in this course, you have several options:

- Get help from the Coaching Network. If you don't know who your local coach is, you can find one here.
- Call the Service Desk at (517) 884-3000
- Email the Service Desk: ais311@msu.edu
Please return to this course at any time for additional review.

Next, complete the course assessment. To launch the assessment:
1. Close this course presentation window and return to Angel.
2. If you are not on the Lessons page in Angel, click the Up link in the upper right corner of the Angel screen. The Lessons link, when displayed, will also return you to the Lessons page.
3. Click the Course Assessment link.