PURCHASE ORDERS

Implementing Electronic Approval Signatures   PO-255

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1. OVERVIEW

The use of electronic signatures for purchase order printing requires setting up data in the:

- PO Form Maintenance Table
- PO Form Maintenance by Department Group Table
- Department Group Profile
- User Profile (where default departments are assigned)
- Electronic signatures must be stored on the server in a designated folder (sections **2.3.1 & 3.1.1**).

2. PREPARATION

AUC allows electronic approvals for Purchase Orders; in addition, the purchase order forms used on site may use electronic signatures, minimizing paper usage, waste, environmental impact and physical storage. Using electronic signatures requires planning and setup.

2.1. Who Must Sign?

If good manual procedures exist, use the manual procedure as a template for automation. If the manual process is not accomplishing goals (purchases are made without the requisite approvals or accountability is lacking), first establish a method that suits the current business rules for the location. Each department may need different levels of approval. AUC is flexible and can accommodate many scenarios; all departments use the same purchase order form but the data on the form may be customized for each department.

2.2. How Many Department Groups?

Department groups may already exist within the AUC system. Users are assigned to department groups in the User Profile table based on their function within the organization. Each user has a default department group; in addition, users may be granted access to other department groups via the **System ▶ Department Group Menu ▶ Department Group Security** screen:

Figure 1 Department Group Security

The user shown above would be unable to create purchase orders for the *SCHOOL, SELECT, SEUSER*, and *SEWER* departments because full access is required to a department group in order for the user to create and edit purchase orders. See *PO–940 Department Groups* for more information.

2.3. What Signatures Should Appear?

Establish who will sign for each department and what dollar level each signatory may approve.

2.3.1. Signature Image Format

Once the department groups are established and the approvers are identified, obtain specimen signatures from each approver. Provide the electronic signature to **ADMINS** with the name and title and **ADMINS** staff will create a composite similar to the one shown in **Figure 2**.

Francis Herlihy
Francis Herlihy, School Business Manager
Figure 2 Sample signature with an embedded printed name & title.

When using a form with five electronic signatures, each signature image must be no greater than.25 inches in height, and the width must not exceed two inches. ADMINS staff will assist with the formatting of signatures. See also *PO–260 Changing a Signature on a PO Form.*

2.4. What are the Dollar Amount Limits?

Each department group may have up to five thresholds for conditionally printing an approval signature. These are in either the **PO Form Maintenance** or **PO Form Maintenance by Department Group**. The information in the "**PO Form Maintenance by Department Group**" screen supersedes the defaults set in the **PO Form Maintenance** table. The **PO Form Maintenance** table was configured during implementation.

2.5.   What Prefix (if any) Prints on Each Department's Purchase Orders?

A prefix may be printed to the right of the purchase order number on the face of the purchase order form. This prefix assists in quickly identifying the department to which a purchase order belongs.

Figure 3 Set the PO# Prefix on the [2 PO/AP] tab of the Department Group Profile Screen

3.   ADMINS SETUP

ADMINS staff will perform the initial setup and installation. The following instructions may be used if making a minor change, such as changing the dollar amount required for an approval.

3.1.   PO Form Maintenance

Approval signatures are controlled via:

1. Module control #3070 sets the maximum number of approval signatures to print on a purchase order.

2. Module control #3071 through 3075 hold either the full file and path name of a signature image, or may hold a text value. Since this document specifically pertains to paperless approvals, the illustrations are all of the filenames for signature images.

3. Module control #3120 through 3124, which correspond to the Approver # signatures. For each value, a signature will be required if the PO total meets or exceeds the approval amount.

Figure 4 Purchase Order Form Maintenance Module Control Approvers and Minimum Values

For example, in Figure 4, **module control 3124** sets the minimum amount of $10,000.01 for the **Approver #5** signature in **module control 3075** to print.

ADMINS recommends that signature files be named with a job description rather than an employee's name. When roles change, only a new signature image will be required. This will minimize effort, i.e., when Betty retires as Finance Director and Andrea replaces her. In Module Control #3074, the graphic DIRFINANCE.PNG currently holds the finance director's signature image, name and title.

3.1.1. Filenames

In the example in Figure 4, module control values **#3074** and **#3075** use the term **FORMSRPT:** instead of a full path name. This value is a shorthand code that AUC interprets as the form and signatures folder for each installation. This shorthand is helpful if long filenames are used for the signatures, as each approver line is limited to a maximum of sixty characters.

3.2. PO Form Maintenance By Department Group

In addition, a default for each department may be set independent of a dollar amount. To create a new department group **form**, click on the **[1 Add New]** button and select the department from the resulting lookup. All of the data that exists in the PO Form Maintenance table will be copied to the new department group.

If there are five signatures to be printed, but the department is set to print only three in the form maintenance table *(module control #3070 in Figure 4)*, only three will ever print, despite any dollar amount limits.
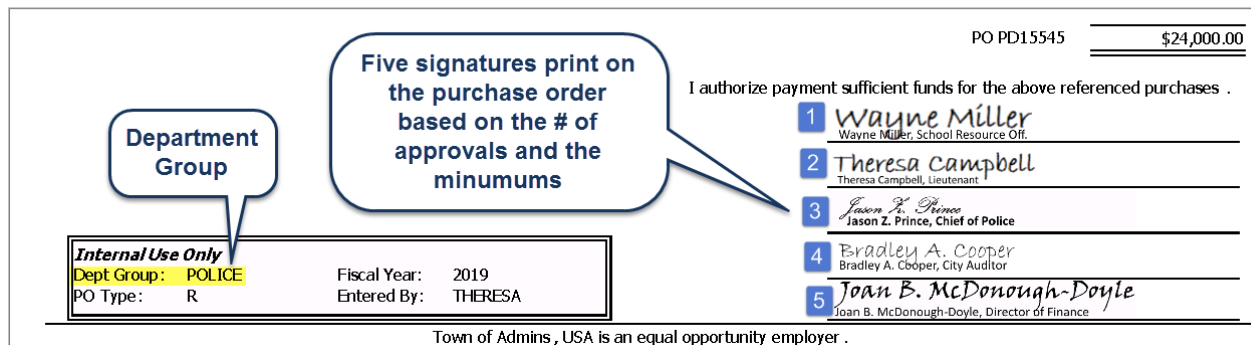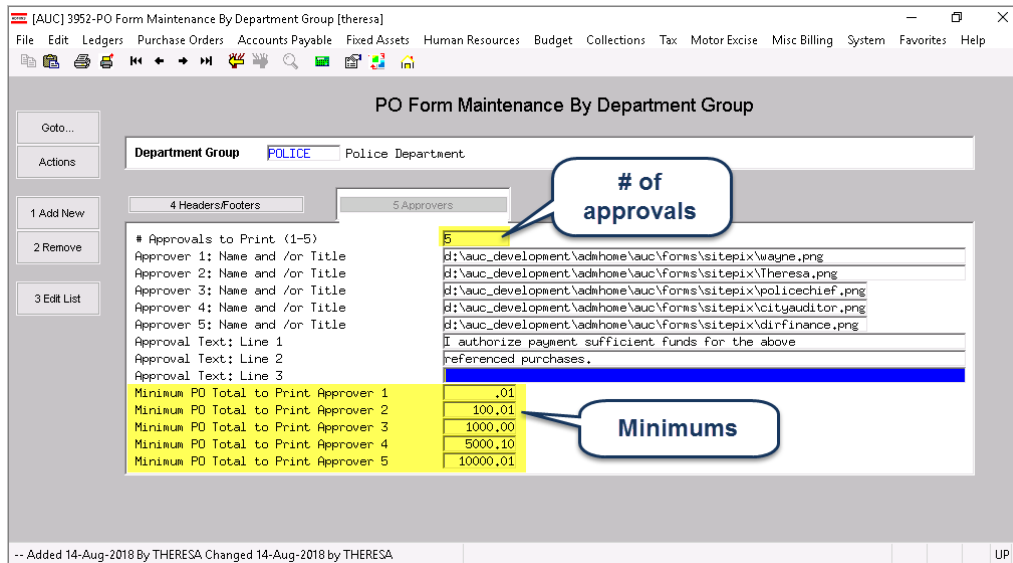
Figure 5 Sample "POLICE" Department-specific Purchase Order

4. PO FORM SAMPLE MAP OF FIELDS
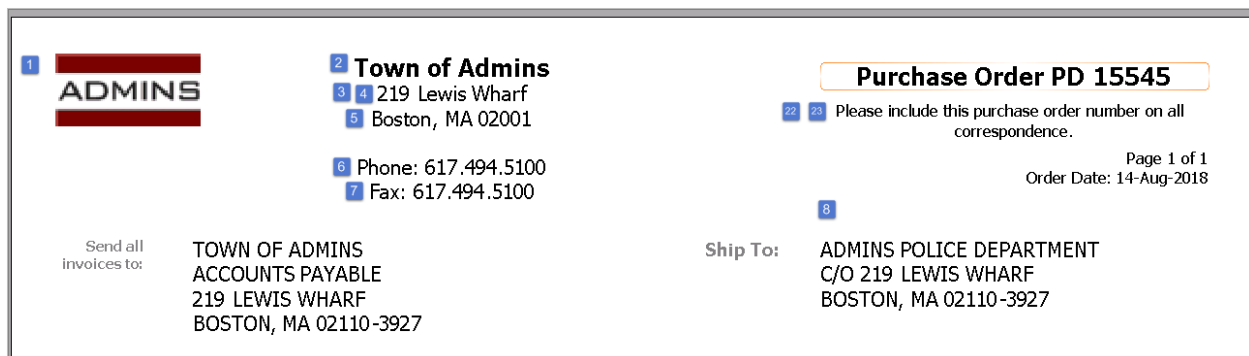
4.1. Map–Top of Form

Figure 6 Top of Purchase Order Form Sample

In the following table, the numbers in column one correspond to the numbers in the blue boxes in the Purchase Order sample above.

4.1.1. PO Form Module Control Descriptions

	Module Control #	Description for PO Form:
1.	3055	Path and filename for Town Seal
2.	3060	Header Line 1: Name of Community
3.	3061	Header Line 2: Department, Title or Address
4.	3062	Header Line 3: Address
5.	3063	Header Line 4: Address
6.	3064	Header Line 5: Phone#
7.	3065	Header Line 6: Fax#
8.	3066	Tax Exempt # (some sites opt not to print this on the PO form)
9.	3067	Approval Text: Line 1
10.	3068	Approval Text: Line 2
11.	3069	Approval Text: Line 3
12.	3070	# of Approvals to Print (1-5)
13.	3071	Approver 1: Name and/or Title (minimum amount in Module Control #3120)
14.	3072	Approver 2: Name and/or Title (minimum amount in Module Control #3121)
15.	3073	Approver 3: Name and/or Title (minimum amount in Module Control #3122)
16.	3074	Approver 4: Name and/or Title (minimum amount in Module Control #3123)
17.	3075	Approver 5: Name and/or Title (minimum amount in Module Control #3124)
18.	3080	Disclaimer: Line 1
19.	3081	Disclaimer: Line 2
20.	3082	Disclaimer: Line 3
21.	3083	Disclaimer: Line 4
22.	3090	Footer: Line 1
23.	3091	Footer: Line 2
24.	3092	Footer: Line 3
25.	3093	Footer: Line 4
26.	3094	Footer: Line 5
27.	3095	Footer: Line 6
28.	3096	Footer: Line 7
29.	3097	Footer: Line 8
30.	3098	Footer: Line 9
31.	3099	Footer: Line 10
32.	3120	Minimum PO Total to Print Approver 1 (as shown on Module Control #3071)
33.	3121	Minimum PO Total to Print Approver 2 (as shown on Module Control #3072)
34.	3122	Minimum PO Total to Print Approver 3 (as shown on Module Control #3073)
35.	3123	Minimum PO Total to Print Approver 4 (as shown on Module Control #3074)
36.	3124	Minimum PO Total to Print Approver 5 (as shown on Module Control #3075)

The middle section of the form contains details about the purchase and the data derives from the PO data as entered.

4.2.   Map–Bottom of Form

The numbers in the blue boxes below correspond to the numbers in column one in the table above.

Figure 7 Purchase Order Sample Bottom of Form

5.   RECOMMENDATIONS FOR IMPLEMENTATION

- Contact support@admins.com if a change to the PO form or signatures are required.
- Ask that the TRAINING area be refreshed
- Test the changes in the TRAINING area in cooperation with ADMINS staff
- Go live with the changes when satisfied