

Quick Change List for Phase 2 PH Purchase Portal

- 3) Update Division name to Child and Family Health, add new for Clinic - Division of Community Health and
- 32) Include check box for non-capital asset
- 22) New option for Submitter and Requestor added
- 25) Quantity will allow for decimals
- 1) Change tax field into a percentage
- 23) Vendor Name autofills and additional vendor information
- 29) Add Vendor contact information, vendor phone, vendor email
- 20) Add Justification to the Form and make it a required
- 24) Add additional options for attachments Supporting Docs, Statement of Work, Quote, Sole Source/CI, Emails,
- 5) Comments Tab to Form for users to add additional information
- 2) Add option in workflow for \$2500+ for Pcard Purchases to flow to Approval \$2500+
- 4) If PRF is placed on HOLD or Return to Requestor - add note that is visible to everyone
- 7) Rename PRF - Purchase Requisition to PRF - Final Purchase Form
- 6) On the Purchase Requisition Form - make Use Tax Yes/No a required field

- 9) Expand field to show all the text
- 10) Allow for negative dollar amounts
- 11) Open field to show full dollar amount - at least 11 characters
- 12) Change workflow and the order process button - make not available until it comes back from PO

- 15) PO Review - reject option
- 16) All attachments - should be attached as a related document
- 17) Final Cost is mandatory in Completed queue
- 18) Have all documents to carry over as related items on all the forms
- 19) Add Vendor name to email notifications

- 21) Allow for deletion rights for PH Supervisor User Group
- 26) Check box for Gift Card Purchase

- 28) Autopopulate Final/Total price

- 30) Have workflow inboxes have the same fields across the top
- 31) Include Final Cost in Order Processed and Completed queues

- 33) Add 2nd item number line
- 34) File name is now mapped to Attachments

Custom Query Changes

- 13) Add PH - Final Request type and PH - Invoice Amount to custom query
- 27) Add Funding Source to custom query