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PURCHASING USER MANUAL

SET UP DEFAULT VIEW OF THE REQUISITIONS, PURCHASE ORDERS, OR RECEIVING SCREENS

INTRODUCTION

You can set up the default view that is displayed when the Requisitions, the Purchase Orders, or the Receiving screen is opened.

When you make a change, you must log off Statewide Accounting Applications, and then log in to see the change.

SET UP THE DEFAULT VIEW OF THE REQUISITIONS SCREEN

The Requisitions screen is opened when you click Requisitions from the Purchasing main menu:

You can choose to display either the Status tab or the Requisition (New Req) tab.
To display the **Status** tab:

1. Select **Status**.
2. Click the drop down menu to select the requisition status to be displayed.
   - Active or recently received
   - All requisitions
3. Click **Update**.

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**Admin: Requisition Tab / Status**

![Image of the Requisitions/Status section from the Purchasing User Manual]

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**Requisitions/Status**

![Image of the Requisitions/Status section from the Purchasing User Manual]

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To display the Requisition (New Req) tab:

1. Select New Req to display the Requisition tab. A New Requisition screen will be displayed so that users can immediately begin creating a new requisition.
2. Click Update.

Admin: Requisition Tab / New Req

SET UP THE DEFAULT VIEW OF THE PURCHASE ORDER SCREEN

The Purchase Order screen is opened when you select Purchase Orders from the Purchasing main menu.
You can choose to display either the **PO Status** tab, the **Req Status** tab, or the **PO** tab.

To display the **PO Status** tab:

1. Select **PO Status**.
2. Click the drop down menu to select the status to be displayed.
   - Active or recently received
   - All Purchase Orders
3. Click **Update**.

**Admin: Purchase Order Tab / PO Status:**

To display the **Req Status** tab:

1. Select **Req Status**.
2. Click the drop down menu to select the status to be displayed.
   - Active or recently received
   - All Requisitions
   - Ready for Purchasing
3. Click **Update**.
Admin: Purchase Order Tab / Req Status

To display the New PO tab:

1. Select New PO to display the PO tab. The PO screen will be displayed so that users can immediately begin creating a new purchase order.
2. Click Update.

Admin: Purchase Order Tab / New PO

Purchase Orders / PO Tab
SET UP THE DEFAULT VIEW OF THE RECEIVING SCREEN

The Receiving screen is opened when you click Receiving from the Purchasing main menu:

1. Click the drop down menu to select the status to be displayed.
   - Active or recently received
   - All Purchase Orders
2. Click Update.

Admin: Receiving Tab

Receiving