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PURCHASING USER MANUAL

APPROVE A PURCHASE ORDER

INTRODUCTION

Purchase order approval is an optional step that [the agency administrator can enable](#) by selecting “PO Approver Required” and assigning users as “PO Approvers”. By doing so, purchase orders must be approved before they are ordered. The PO Approver can review, make some changes, add a vendor, and order the items or allow the purchaser to place the order. The PO Approver can also reject the purchase order back to the purchaser. Each agency can develop their own internal rules for PO Approvers.

APPROVE A PURCHASE ORDER

1. From the **PO Status** screen, select a purchase order with a status of **Ready for Approval**. (If desired, select **Ready for Approval** from the **Status** drop-down menu and click **Find**.)

Figure 1 - PO Status

The screenshot shows the 'PO Status' screen with a search bar and a table of purchase orders. The 'Ready for Approval' status is circled in red.

PO #	Required by Vendor	Status
Select 009TV	04/28/2008 BEST BUY STORES LP	Some items received
Select 6235-Sx	OPTICAL SURVEILLANCE SYSTEMS INC	All items ordered
Select D8000-PO	BOISE TIRE COMPANY INC	All items received
Edit P0900	GARDEN CENTER WEST INC	In Purchasing
Approve P0901	BENCHMARK	Ready for Approval
Select WKP80003	CLOS OFFICE SUPPLY INCORPORATED	Some items received

2. Click **Approve** next to the purchase order. The purchase order will open on the **PO** screen.

Figure 2 - PO details

The screenshot shows the 'PO details' screen. The 'Status' is 'Ready for Approval' and the 'Approve' button is circled in red.

Department: R&D: Research and Development
 PO #: PO901
 Vendor #: 382349724 -00 BENCHMARK
 State Contract: [None]
 Status: Ready for Approval
 Total: \$175.00
 PO Created: JAMES (04/24/2008)
 PO Edited: JAMES (04/24/2008)

Sel	Menu	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	Sub Total
<input checked="" type="checkbox"/>	Menu	000123	04/25/2008		<input type="checkbox"/>	Assigned to PO		LED Lamps	5	Each	19.00	95.00
<input checked="" type="checkbox"/>	Menu	000123	04/25/2008		<input type="checkbox"/>	Assigned to PO		Headlamps	4	Each	20.00	80.00

3. Review the purchase order as needed:
 - a. Click **Print Preview** to view and/or print the entire purchase order in PDF format.
 - b. Click **Vendor Notes** to view or select predefined notes that will print on the purchase order.
 - c. Click **PO Atch** to view any attached documents or to add additional documents related to the purchase order in general.
 - d. Check **Vendor Info** to view the vendor name and address (displayed on each line item). If needed, the Approver can add a vendor to the purchase order. Click the asterisk next to **Vendor #** to search for and add a vendor. However, once the purchase order is approved or ordered, you cannot add a vendor.
 - e. Check **Coding Info** to view the fiscal coding on each line item.
 - f. Review the line items for description, quantity, price, etc.
 - g. Click the line item **Notes** icon to view or add any notes specific to the line item. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****.
 - h. Click the line item **Atch** icon to view any attached documents or to add additional documents specific to the line item.
4. Make any changes as needed. PO Approvers can change the **Item, Description, Qty, U.M., or Price**. PO Approvers cannot change fiscal coding. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****, in the **Description** field.
5. Click **Approve**.
6. Click **Reject** if you need to send the purchase order back to the purchaser.

Figure 3 - PO Approver to order

The screenshot shows the PO Approver interface with the following details:

- Department:** R&D: Research and Developer
- PO #:** PO901
- Vendor #:** 382349724 -00 BENCHMARK
- Status:** Approved
- Total:** \$175.00
- PO Created:** JAMES (04/24/2008)
- PO Edited:** JAMES (04/24/2008)

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 000123	04/25/2008			Assigned to PO		LED Lamps	5	Each	19.00	95.00
<input checked="" type="checkbox"/>	Menu 000123	04/25/2008			Assigned to PO		Headlamps	4	Each	20.00	80.00

ENCUMBRANCES

When a purchase order is finally “ordered”, any line item on the purchase order with a transaction code 215 (encumbered) will be sent to STARS. Other TCs are not sent to STARS.

- If the quantity changes for an encumbered line item that has not yet been ordered, the quantity for that item is modified in the TC215 that will be sent to STARS.

- When a purchase order is voided, the application will send a TC225 for each encumbered line item. For these line items, if the **MOD** field is blank, STARS will treat it as a partial just as if the user had entered a “P”. If the user enters an “F”, STARS will finalize it.

PRINT, SAVE, OR E-MAIL A PURCHASE ORDER

1. To print a purchase order, click **Print Preview**. The first time you click Print Preview, two options will be available – **Purchase Order** and **PO Form #2**. **PO Form #2** includes the fiscal coding of each individual line item.
2. Click **Preview** to display the purchase order.

Figure 4 - Print Preview options



The second time you click **Print Preview**, a third option will be available – **Original PO**. Since an Approver or Purchase can make changes on a purchase order (e.g., increase the quantity of a line item), the **Original PO** will print the purchase order before the changes made by an Approver or Purchaser.

3. The purchase order form will be displayed in PDF in a browser window. Depending on your PDF software, click the appropriate icon on the toolbar to print, save, or e-mail the form, or click File, Attach to E-mail.

To e-mail a purchase order form directly from the PDF window, you may have to configure Internet Explorer to recognize with your e-mail client. On Internet Explorer:

1. Click Tools and select Internet Options.
2. Click the **Programs** tab.
3. Select your e-mail client from the **E-Mail** drop down menu.
4. Click **OK**.

Other security polices may be set by your PC or IT administrators to allow the PDF software to connect to your e-mail client. Contact your support personnel for assistance.

REJECT A PURCHASE ORDER

The approver can reject a purchase order after it has been approved. The purchase order would go back to the purchaser for changes. The purchaser can edit and re-save the purchase order, keeping the same purchase order number, vendor information, etc.

On the **PO** screen, click **Reject**.

Figure 4 - Reject a purchase order

The screenshot shows the 'PO' screen with the following details:

- Department: R&D: Research and Developer
- PO #: 6235-Sx
- Vendor #: 731459340 - 01 OPTICAL SURVEILLANCE SYSTEMS INC
- Status: Ready for Approval
- Total: \$445.00
- Buttons: New PO, Save, Print Preview, Ordered, **Reject** (circled in red), Void PO
- Table with columns: Sel, Req #, Need By, Notes, Atch, Status, Item #, Description, Qty, U/M*, Price, SubTotal

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Ordered	333-ABC	Binoculars	3	Each	89.00	267.00
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Ordered	8456AMC	Binoculars	2	Each	89.00	178.00

CLEAR OR VOID A PURCHASE ORDER

The next two steps apply to purchasers, but an approver may see these options depending on how the administrator has set up the users.

CLEAR A PURCHASE ORDER

If purchase order numbers are set up to be automatically assigned, but the number has not yet been assigned (i.e., the purchase order has not been ordered), the purchaser can **Clear** the purchase order. The line items will be available for a new purchase order. The assigned *tracking number* will not be reused.

There will not be an option to clear a PO with a manually entered number because a manually entered number is required before a PO can be saved. It can be voided.

On the **PO** screen, click **Clear**.

Figure 5 - Clear the purchase order

The screenshot shows the 'PO' screen with the following details:

- Department: R&D: Research and Developer
- PO #: PO907
- Vendor #: 820300144 - 00 GARDEN CENTER WEST INC
- Status: In Purchasing
- Total: \$175.80
- Buttons: New PO, Save, Print Preview, Ordered, **Clear** (circled in red)
- Table with columns: Sel, Req #, Need By, Notes, Atch, Status, Item #, Description, Qty, U/M*, Price, SubTotal

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 20080008	04/18/2008			Assigned to PO	00455	Grass Seed	11	Bag	15.00	165.00
<input checked="" type="checkbox"/>	Menu WRK80018	12/21/2007			Assigned to PO		Fertilizer	9	Bag	1.20	10.80

VOID A PURCHASE ORDER

A purchaser can void a purchase order before or after it has been ordered, but not if any items have been received. NOTE: If some items have been received and you want to close out the purchase order, you can reject, cancel, or remove the line items not received.

Voiding the purchase order puts the line items back on the PO screen. The purchaser can add them to a new PO, reject them back to the requester, or cancel them. The voided purchase order number cannot be used again.

On the PO screen, click **Void PO**.

Figure 6 - Void PO

The screenshot shows the 'PO' tab selected in a software interface. At the top, there are tabs for 'PO Status', 'Req Status', 'Requisition', 'PO', and 'Report'. Below the tabs, there are fields for 'Department' (R&D: Research and Developer), 'PO #' (6235-Sx), and 'State Contract'. There are buttons for 'New PO', 'Save', and 'Print Preview'. The 'Vendor #' is 731459340 and the vendor name is OPTICAL SURVEILLANCE SYSTEMS INC. There are fields for 'State Contract', 'Required Delivery', 'PO Options' (set to None), 'Vendor Notes', and 'PO Atch'. A button labeled 'Ordered' is visible. The status is 'All items ordered' and the total is '\$445.00'. There are buttons for 'View Selected Items', 'Vendor Info', 'Coding Info', and 'Receiving Info'. A button labeled 'Void PO' is circled in red. Below this is a table with columns: Sel, Req #, Need By, Notes, Atch, Status, Item #, Description, Qty, U/M*, Price, and SubTotal.

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Ordered	333-ABC	Binoculars	3	Each	89.00	267.00
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Ordered	8456AMC	Binoculars	2	Each	89.00	178.00

If the purchase order has been approved and ordered and then is voided, the application will send a TC225 for each line item that has been encumbered. For these line items, if the **MOD** field is blank, STARS will treat it as a partial just as if the user had entered a P. If the user enters an “F”, STARS will finalize it.