PURCHASING USER MANUAL 1

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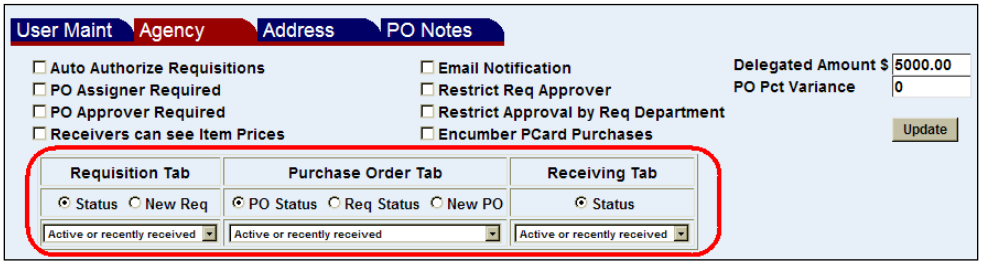
PURCHASING USER MANUAL

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

INTRODUCTION

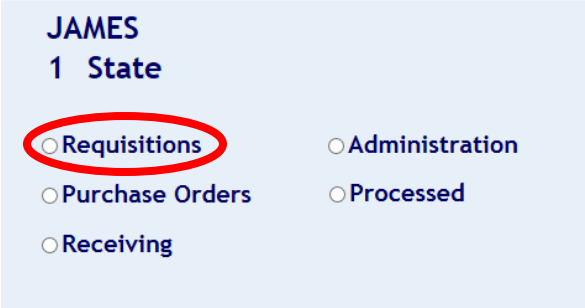
You can set up the default view that is displayed when the Requisitions, the Purchase Orders, or the Receiving screen is opened.

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:

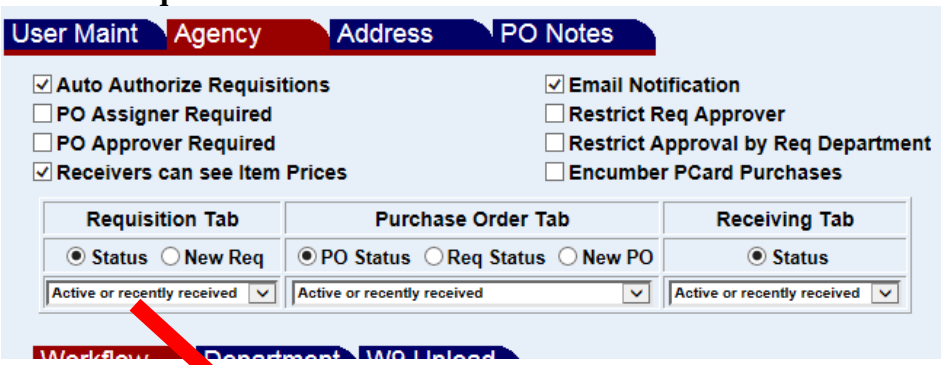


You can choose to display either the **Status** tab or the **Requisition** (**New Req**) tab.

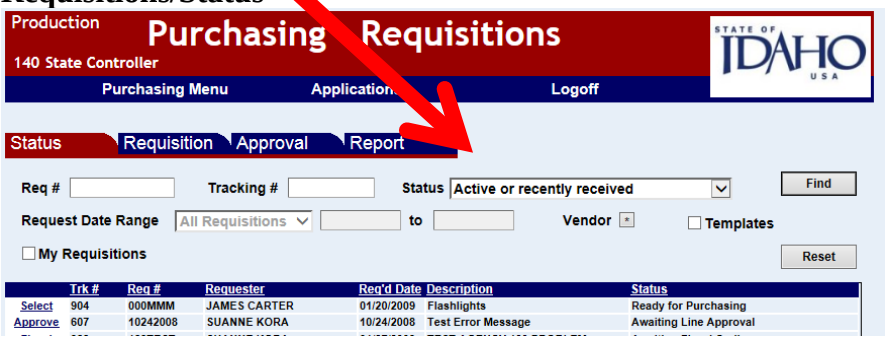
To display the **Status** tab:

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**.

Admin: Requisition Tab / Status



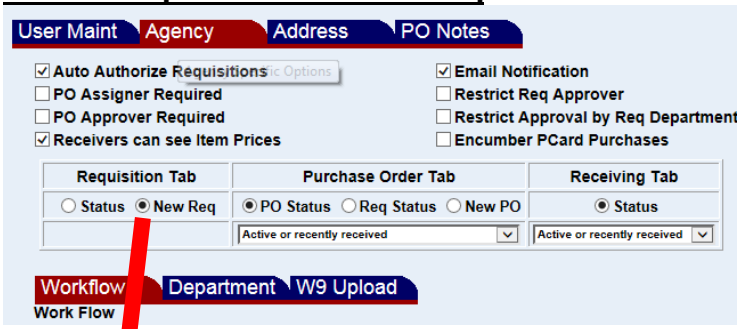
Requisitions/Status



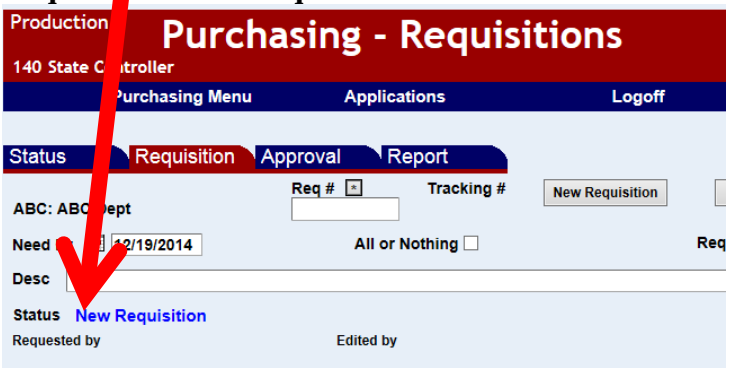
To display the **Requisition** (New Req) tab:

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.
1. Click **Update**.

Admin: Requisition Tab / New Req



Requisitions/New Requisition



SET UP THE DEFAULT VIEW OF THE PURCHASE ORDER SCREEN

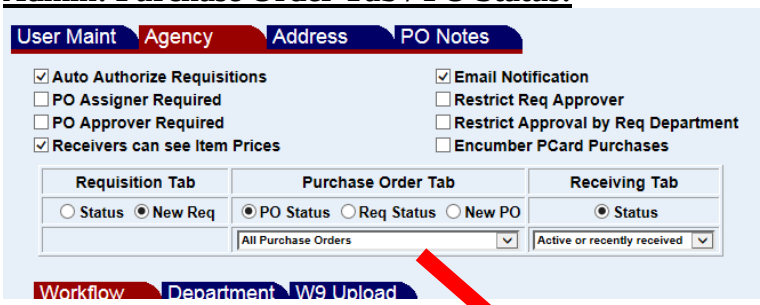
The **Purchase Order** screen is opened when you select **Purchase Orders** from the **Purchasing** main menu.

You can choose to display either the **PO Status** tab, the **Req Status** tab, or the **PO** tab.

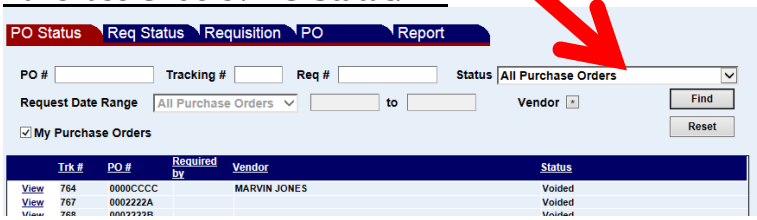
To display the **PO Status** tab:

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:



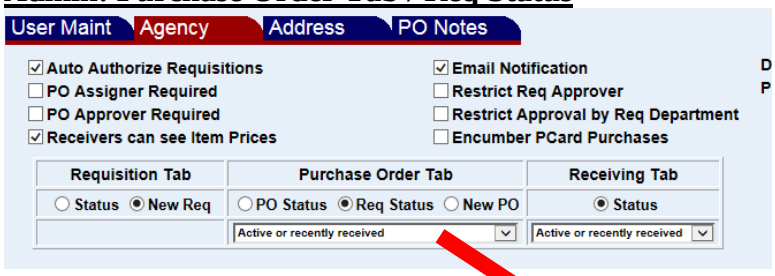
Purchase Orders / PO Status/All



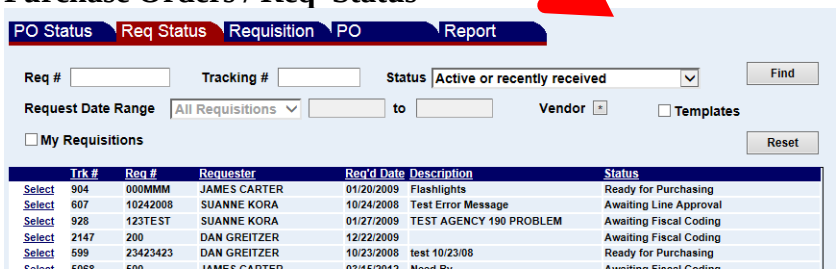
To display the **Req Status** tab:

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



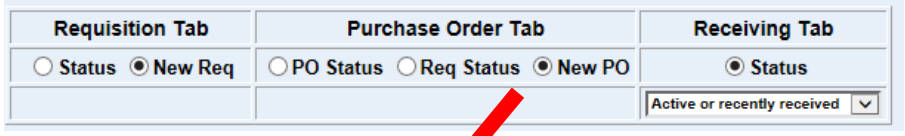
Purchase Orders / Req Status



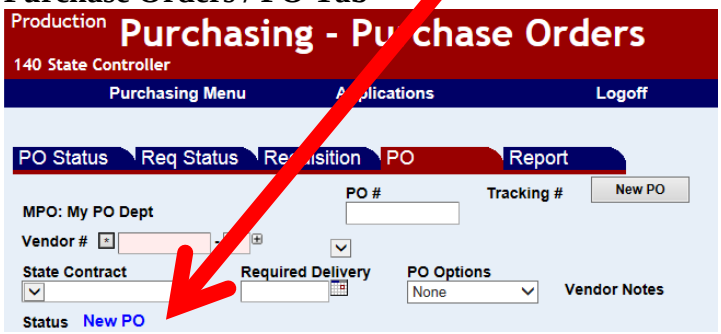
To display the **New PO** tab:

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



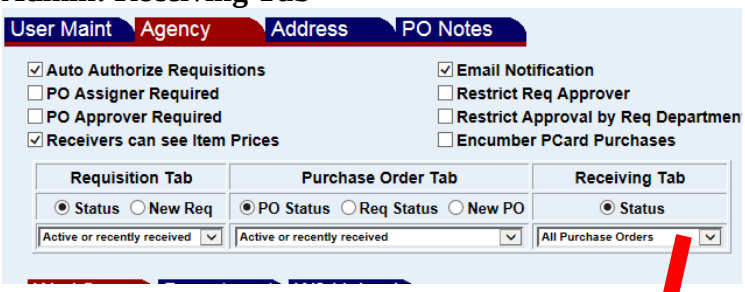
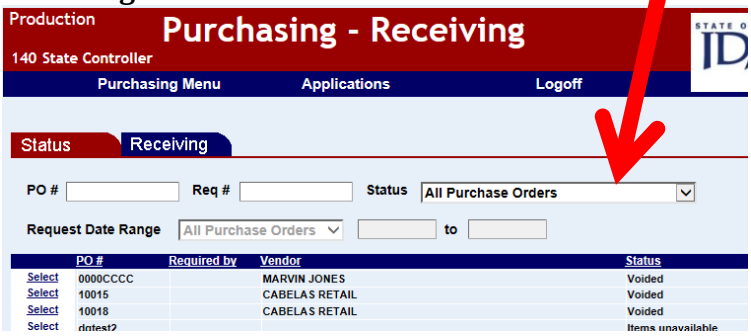
SET UP THE DEFAULT VIEW OF THE RECEIVING SCREEN

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

The **Status** tab is the only available selection; however, you can set up which status is displayed on the **Status** tab.

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