SUNGARD® PUBLIC SECTOR

ONESolution™

ONESolution
Purchasing
End User Guide

SunGard Public Sector
1000 Business Center Drive
Lake Mary, Florida 32746

Phone: (800) 695-6915
Fax: (407) 304-1005

Web site: http://www.sungardps.com
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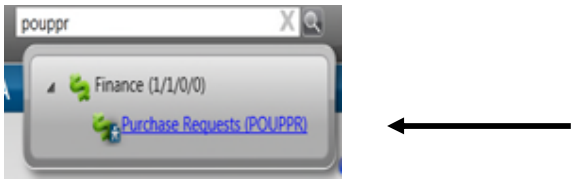
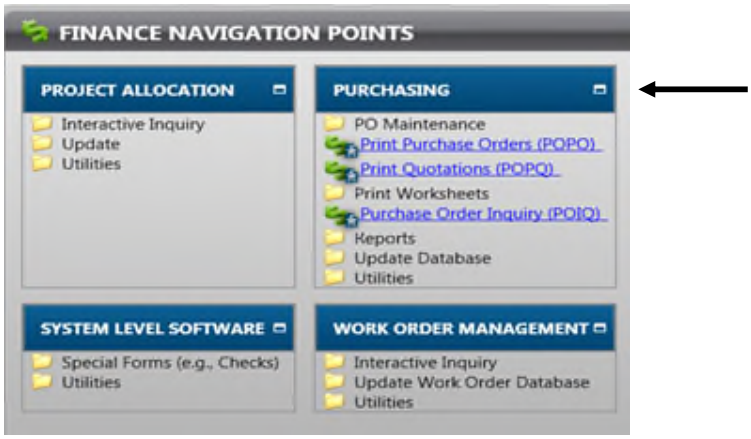
Section 1: Creating Standard Purchase Requisition

Standard PO Process

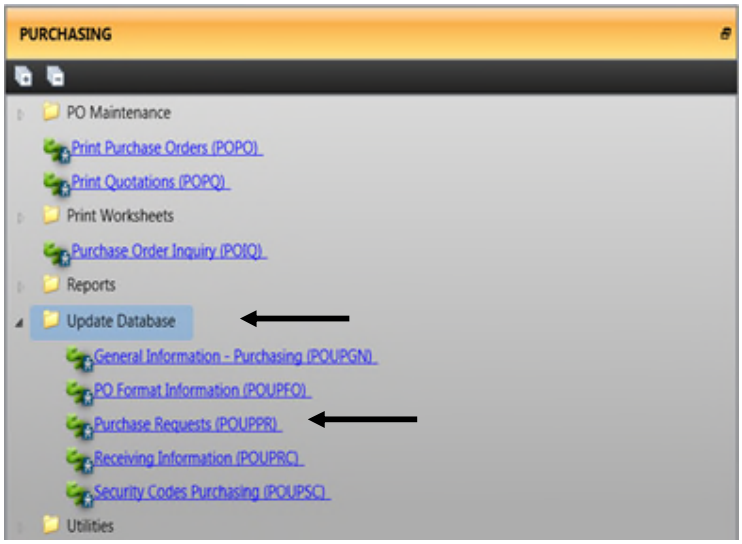
- The path to **Create Requisitions** is **POUPPR**, you can enter that in the search bar in the top right corner of the homescreen and click the "Enter " button from the keyboard and then click on Purchase Requests (POUPPR):



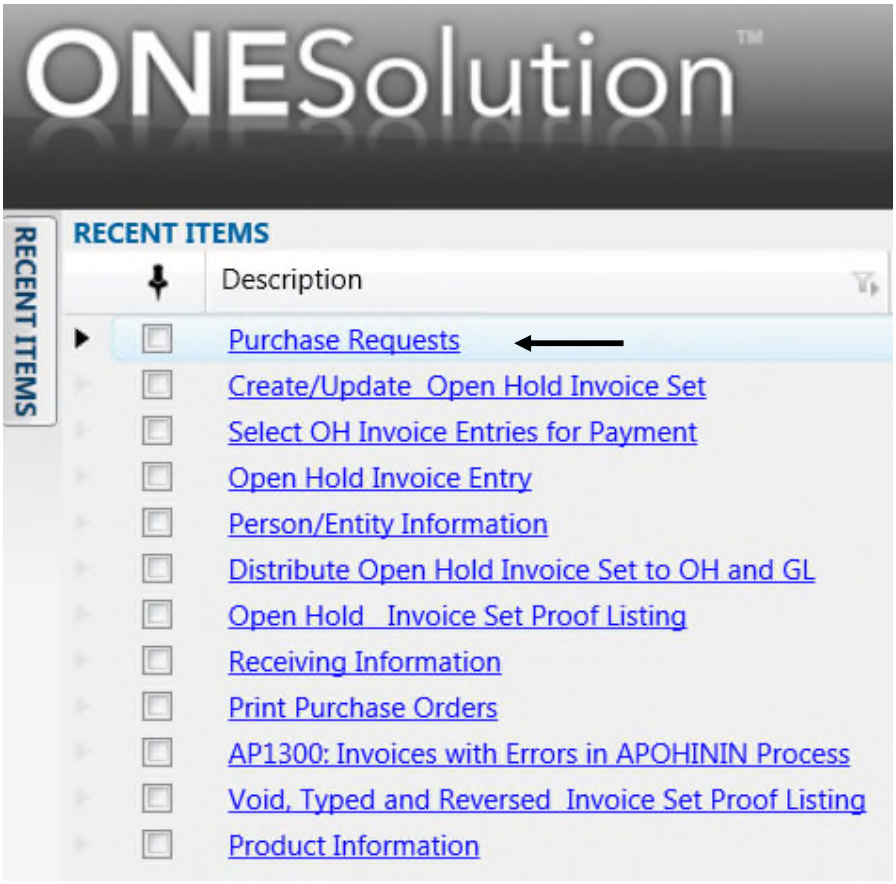
- Or click on the Finance icon in the bottom left corner of the screen which will open up the Finance Navigation Points and scroll until you reach the Purchasing Navigation point:



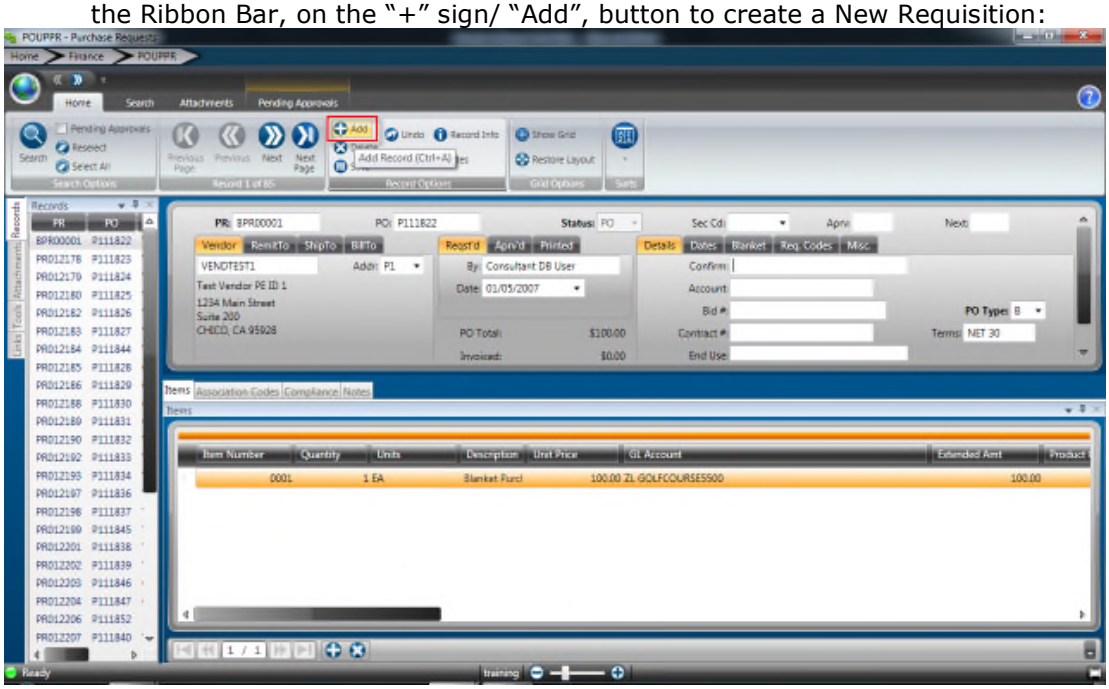
- Click on Update Database and then Purchase Requests:



- Or if you recently browsed the Purchase Request screen, go to your Recent Items tab on the left hand side of your screen, expand it, and click on Purchase Requests:

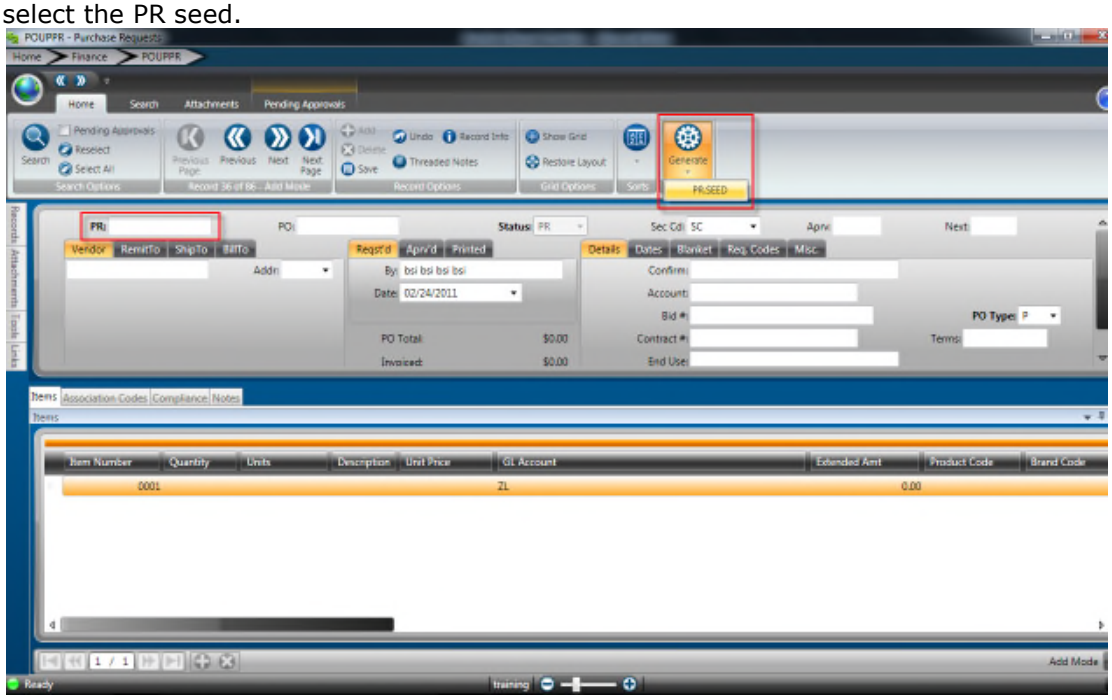

ONESolution™
RECENT ITEMS
RECENT ITEMS
Description
Purchase Requests
Create/Update Open Hold Invoice Set
Select OH Invoice Entries for Payment
Open Hold Invoice Entry
Person/Entity Information
Distribute Open Hold Invoice Set to OH and GL
Open Hold Invoice Set Proof Listing
Receiving Information
Print Purchase Orders
AP1300: Invoices with Errors in APOHININ Process
Void, Typed and Reversed Invoice Set Proof Listing
Product Information

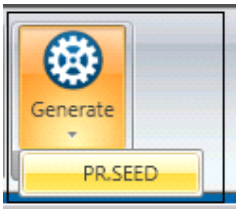
- Once you are in the Purchase Request Screen, click on the ADD button from the Ribbon Bar, on the "+" sign/ "Add", button to create a New Requisition:



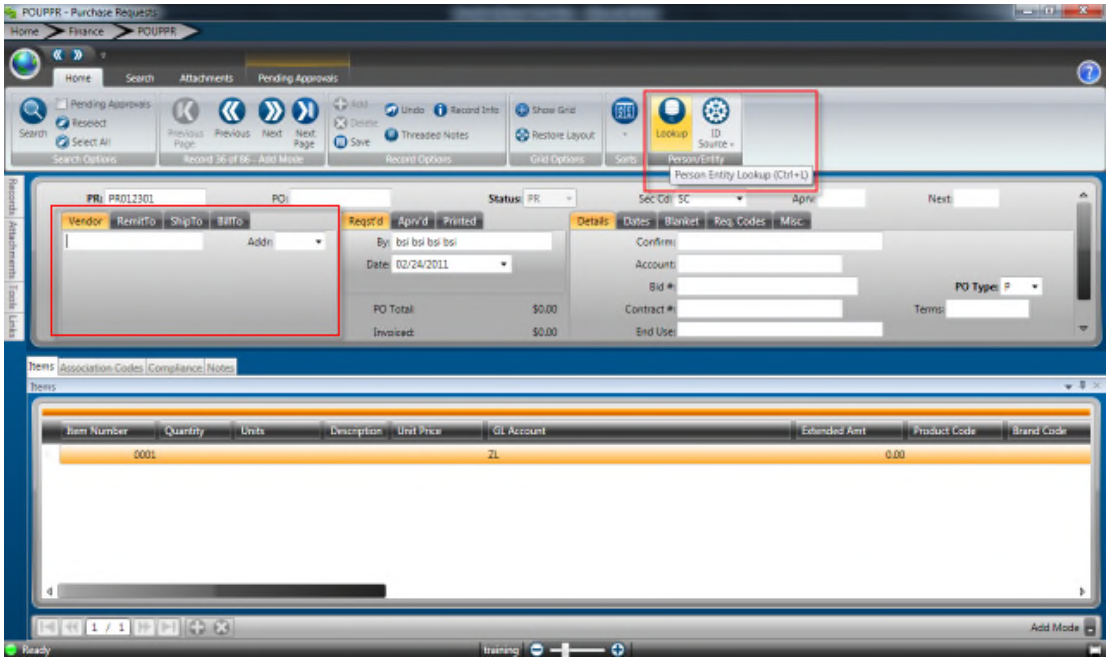
(1) Click on the Button.

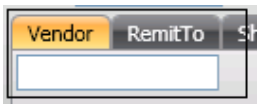
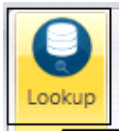
PR Number- The system will assign the next available number. Click on the PR field then the click on the "Generate" button from the Ribbon Bar. Select the drop down to select the PR seed.



(1) Click on the field and then click on the 

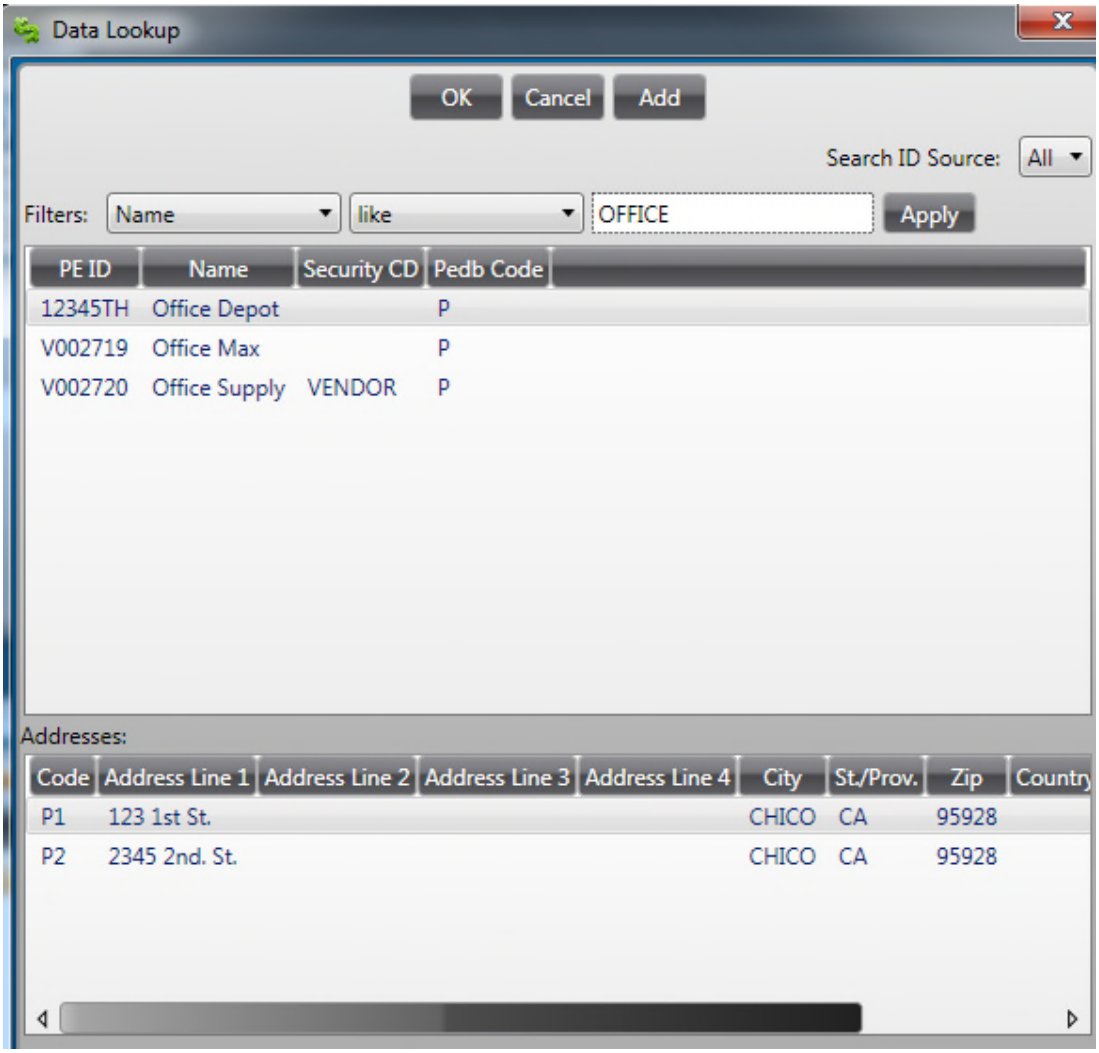
Vendor- Click on the Vendor field then click on the Lookup icon from the Ribbon Bar



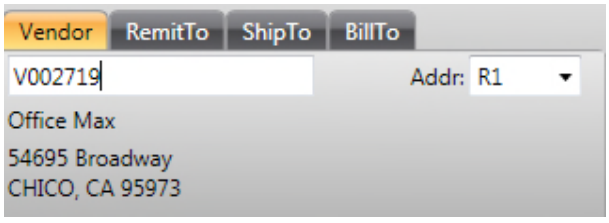
(1) Click in the  field and then click on the  button

Enter a portion of the vendors name (it is not necessary to enter the full name). Click Apply to display names matching the name entered.

*Using wildcards (**) is also an option when only a portion of the vendor's name is known. For example, if *Office* is typed the system finds each vendor that has the word [office] within the name. If the user types in Office* the system will find only the vendors that begin with the name Office.*

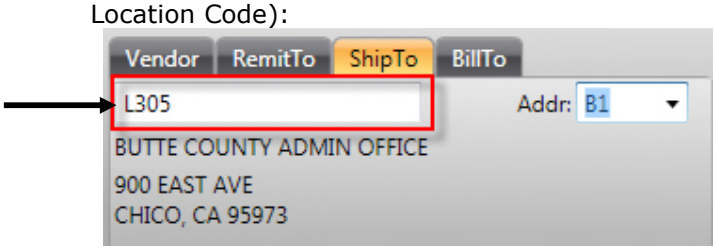


Select the appropriate ID by highlighting it and clicking OK. Double clicking will also pull the ID back into the record:



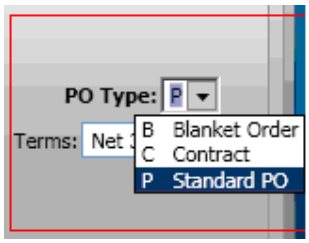
Note that all addresses defined for a vendor will be listed in the lower portion of this screen. The highlighted address is the one that will be brought into the record. Simply highlight the appropriate address if the default address is incorrect.

Ship to – The Ship To ID will be typed into the ShipTo Field, Lxxx (L-Ship To, XXX-Location Code):

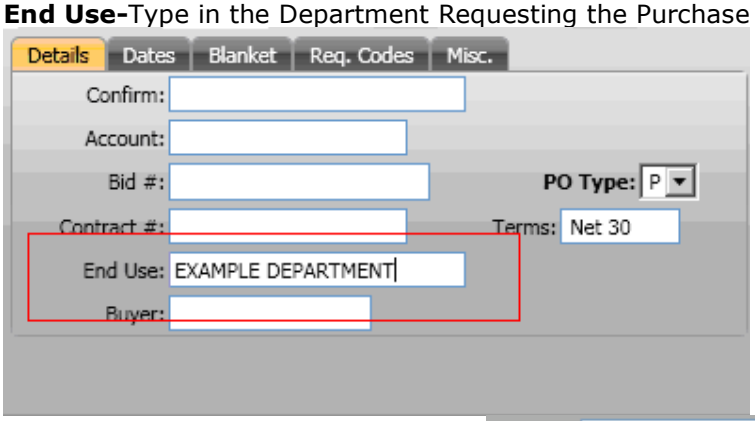


(1)Type in the ShipTo ID

PO Type –This will default to P-Standard PO. If the Purchase Request is a blanket then select B-Blanket, if it is a contract select C-Contract from the drop down:



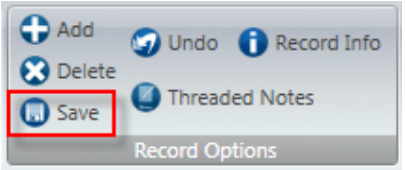
End Use-Type in the Department Requesting the Purchase Order:



(1) Type in the Deparment in the

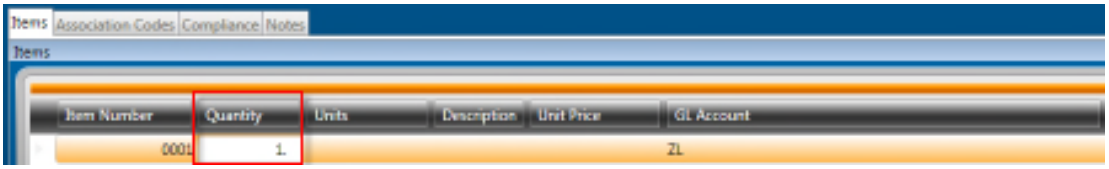
field.

At this time pressing the save button will save the header portion of the requisition, however no money has been encumbered until a quantity and unit cost is entered with the account to be pre-encumbered:



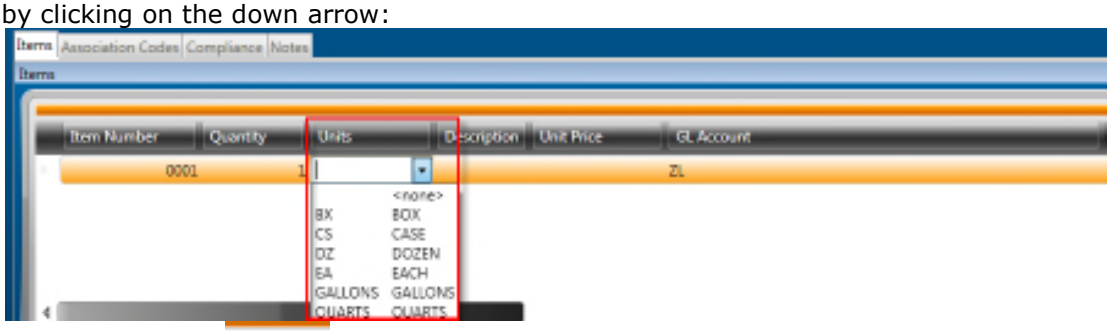
****Make sure to note the PR number in case you must leave screen and locate record at a later time.**

Quantity – If the Purchase Requisition is being itemized, enter the exact quantity for the item being purchased. If the Requisition is a Blanket, then enter a 1 as the quantity:



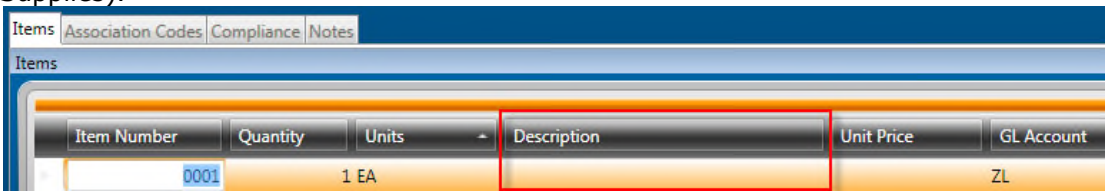
(1) Enter in the

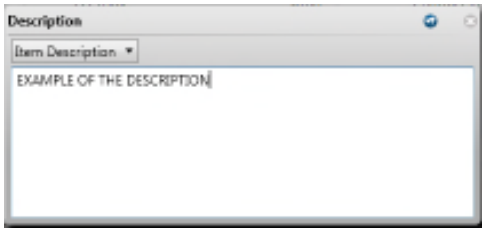
Unit – Select the appropriate Unit of Measure from the drop down list. Access the list by clicking on the down arrow:



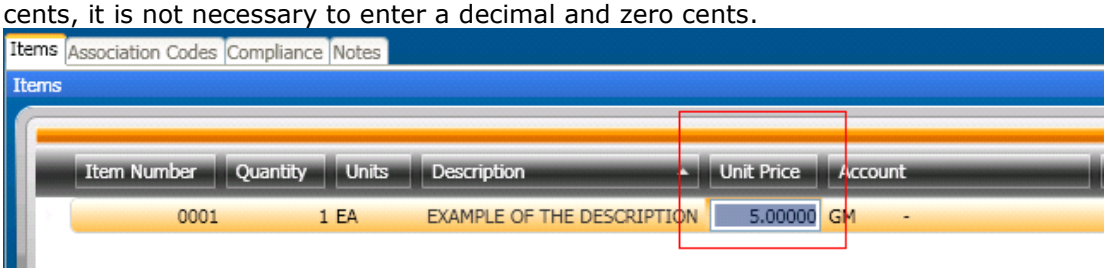
(1) Select the

Description – Enter the description of the item being purchased. If creating a blanket, enter general description of items being purchased (for example, Office Supplies).



(1) Enter the 

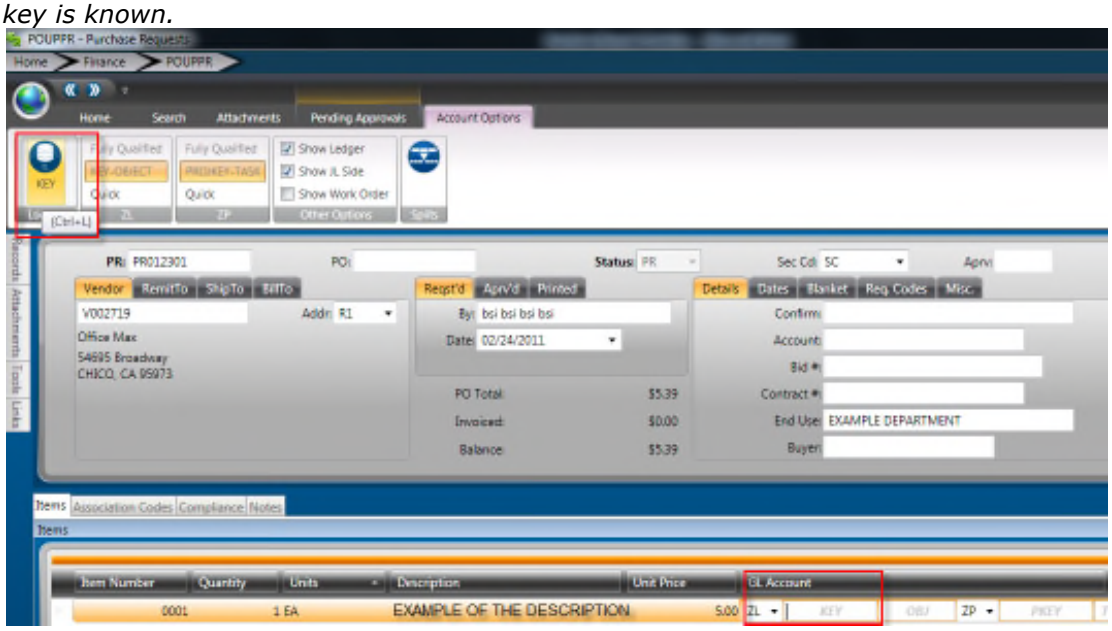
Unit Price – Enter the dollar amount for the unit price. If entering a number with no cents, it is not necessary to enter a decimal and zero cents.



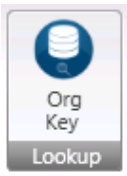
(1) Enter in

Account – Enter the GL Org Key code and Object code to be encumbered for the purchase. If the numbers are known, simply type them into the appropriate field.

To see a list of available Keys, make sure your cursor is in the Key field first, then click on the LookUp button. A list will appear of account numbers for your department. Double-click on the appropriate code to have the system bring it onto the Purchase Request record. *Using wildcards (*) is also an option when only a portion of the of the key is known.*



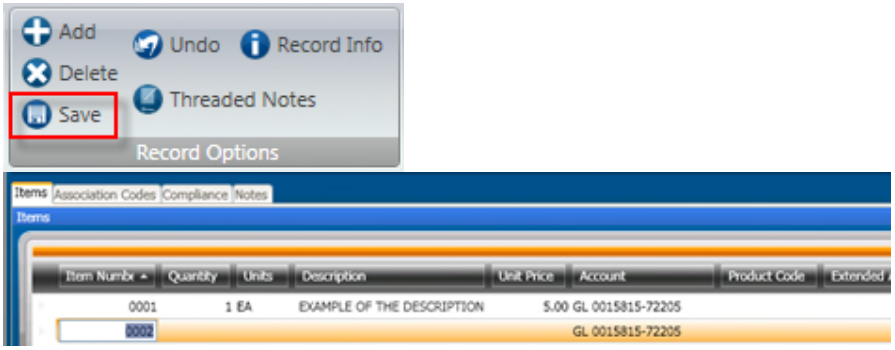
(1) Make sure your cursor is the

and select the 

Access the lookup for Object Codes by clicking on the LookUp button when the cursor is in the Object field. Select the appropriate Object Code by double clicking on it in the same fashion used to select the Key.

Save the Record

At this time pressing the save button will save the record.



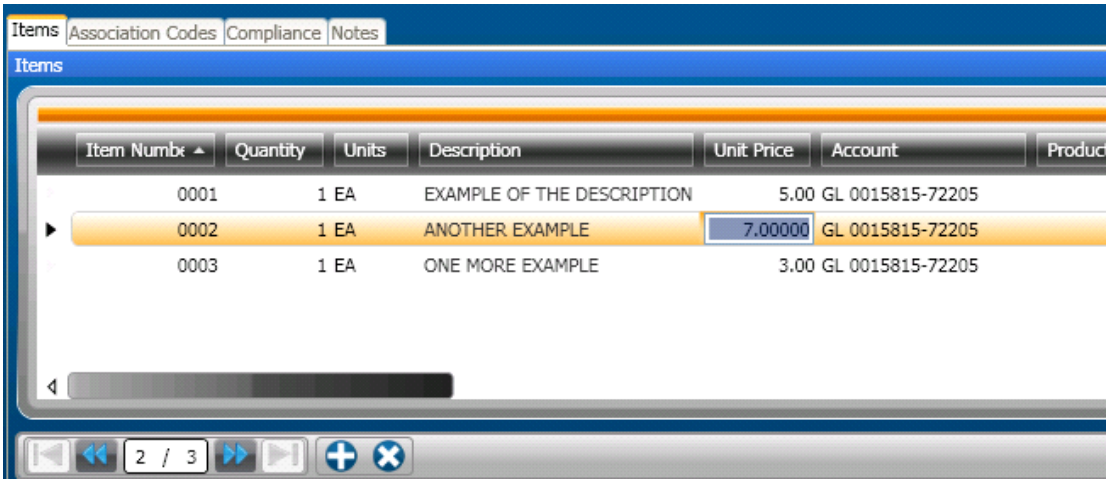
If additional line items are necessary, simply go to the next line on the grid and repeat the steps outlined for data entry of Item Information. The system automatically numbers the next line item in anticipation of additional records.

There will be times when the "Record Accepted" message is not received and a budget warning appears instead. These warnings are intended to inform the User that funds are not available and to take the necessary steps to move money into the account or choose another account to expense the purchase. Budget warnings can be overridden and the record saved by simply pressing the Enter key again until the "Record Accepted" message is received.

Once all line items are entered, skip to section 9 to add attachments or section 10 to submit PR to Workflow if there are no attachments for this requisition.

Deleting a Line Item

If a line item needs to be deleted, highlight the line by clicking on any field so the line highlighted, as shown in the example below



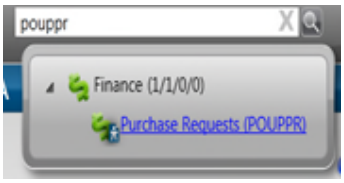
Next, click on the x button in the lower toolbar to delete the line item

(1) Click on the

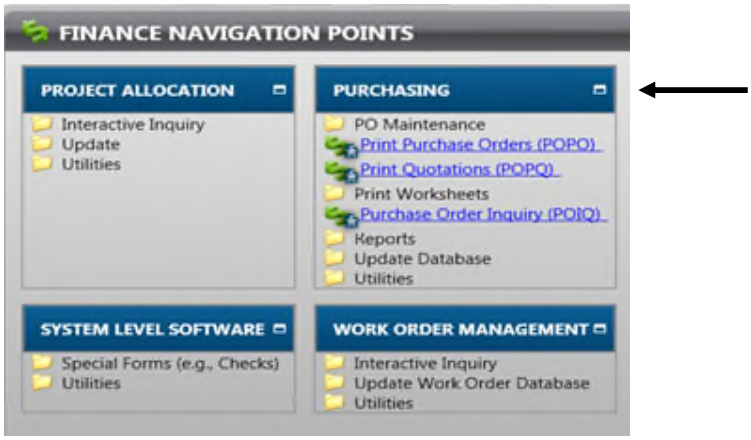
Section 2: Creating Blanket Purchase Requistion

Blanket PO Process

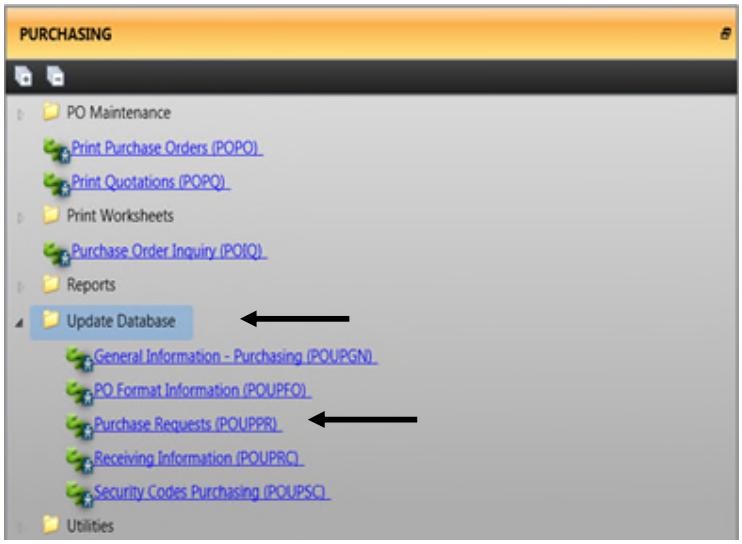
- The path to **Create Requisitions** is **POUPPR**, you can enter that in the search bar in the top right corner of the homescreen and click the "Enter " button from the keyboard and then click on Purchase Requests:



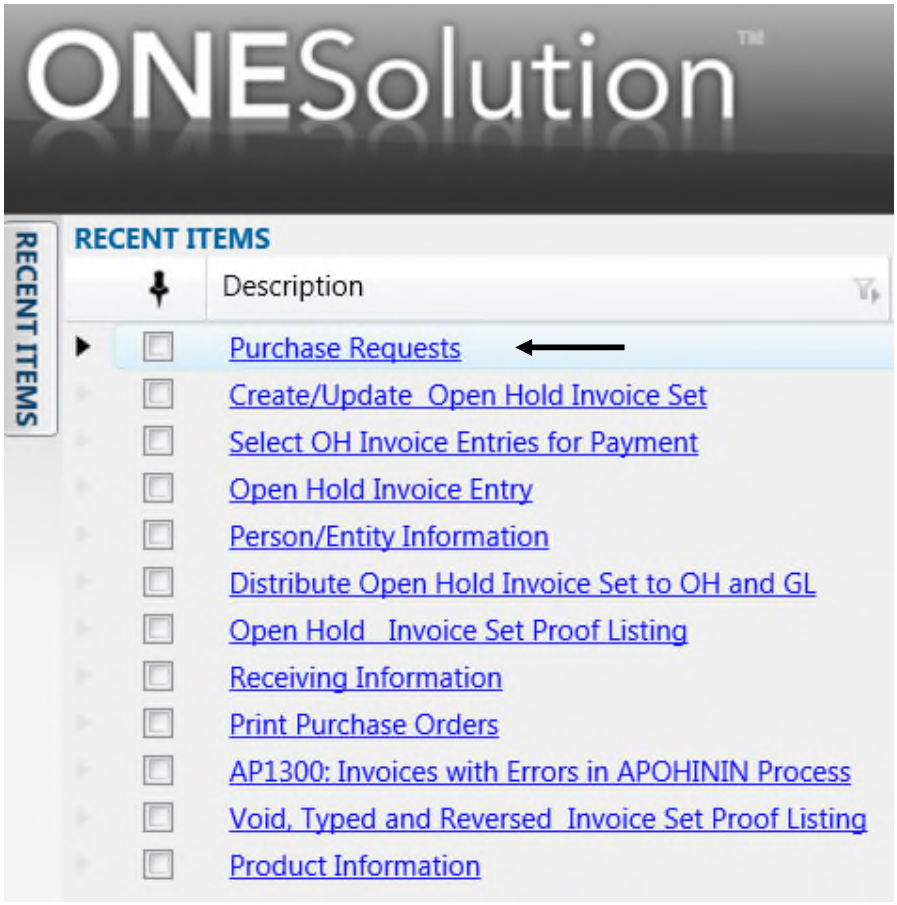
- Or click on the Finance icon in the bottom left corner of the screen which will open up the Finance Navigation Points and scroll until you reach the Purchasing Navigation point:



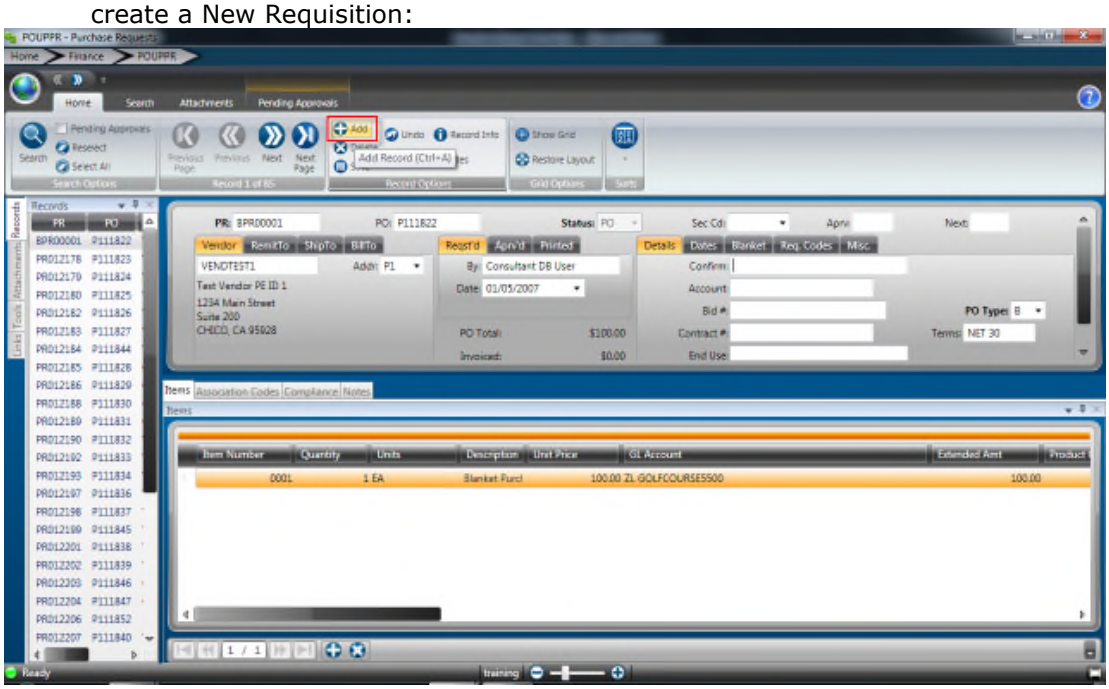
- Click on Update Database and then Purchase Requests:



- Or if you recently browsed the Purchase Request screen, go to your Recent Items tab on the left hand side of your screen, expand it, and click on Purchase Requests:

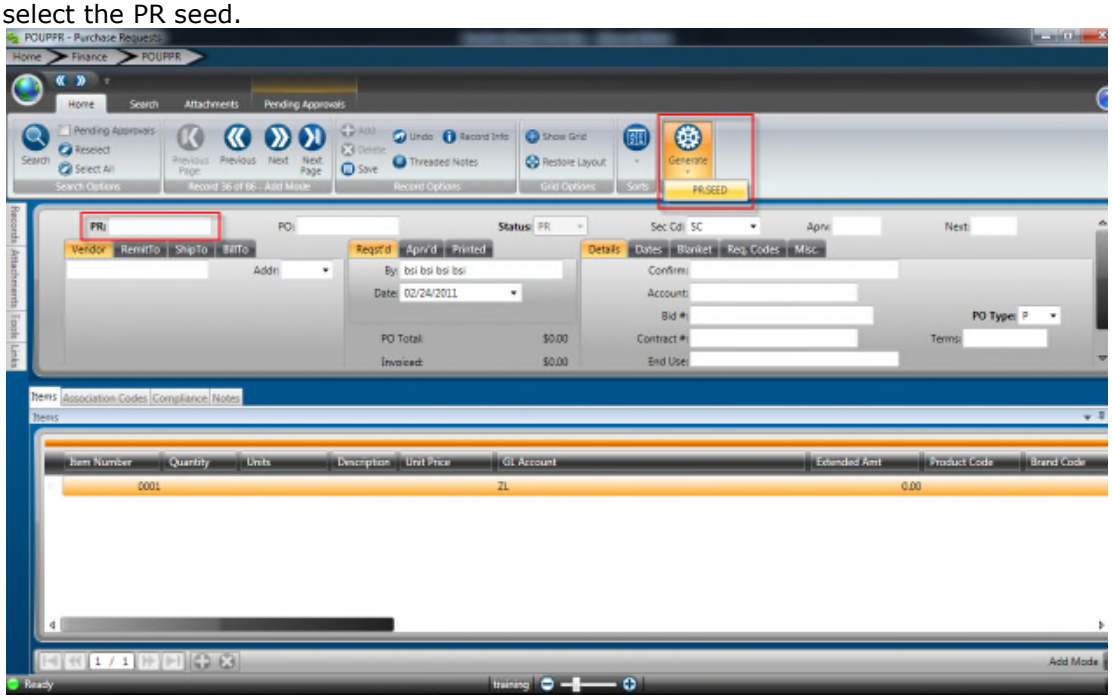

ONESolution™
RECENT ITEMS
RECENT ITEMS
Description
Purchase Requests
Create/Update Open Hold Invoice Set
Select OH Invoice Entries for Payment
Open Hold Invoice Entry
Person/Entity Information
Distribute Open Hold Invoice Set to OH and GL
Open Hold Invoice Set Proof Listing
Receiving Information
Print Purchase Orders
AP1300: Invoices with Errors in APOHININ Process
Void, Typed and Reversed Invoice Set Proof Listing
Product Information

- Click on the ADD button from the Ribbon Bar, on the "+" sign/ "Add", button to create a New Requisition:



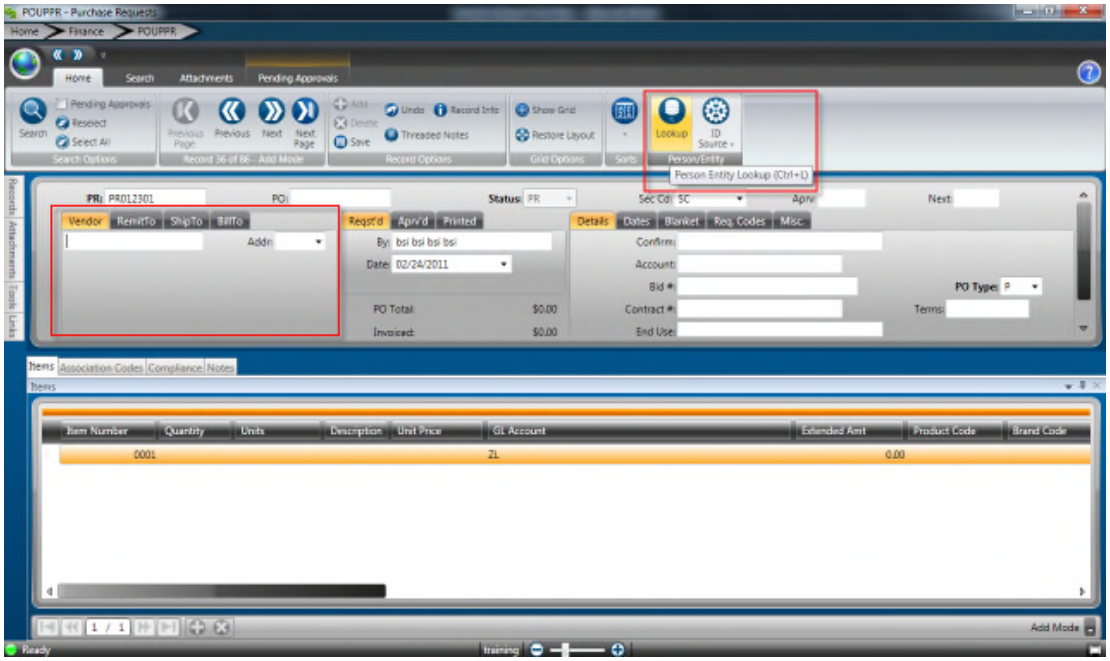
(2) Click on the Button.

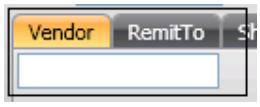
PR Number- The system will assign the next available number. Click on the PR field then the click on the "Generate" button from the Ribbon Bar. Select the drop down to select the PR seed.

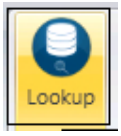


(2) Click on the field and then click on the

Vendor- Click on the Vendor field then click on the Lookup icon from the Ribbon Bar to enter the vendor the blanket is with:



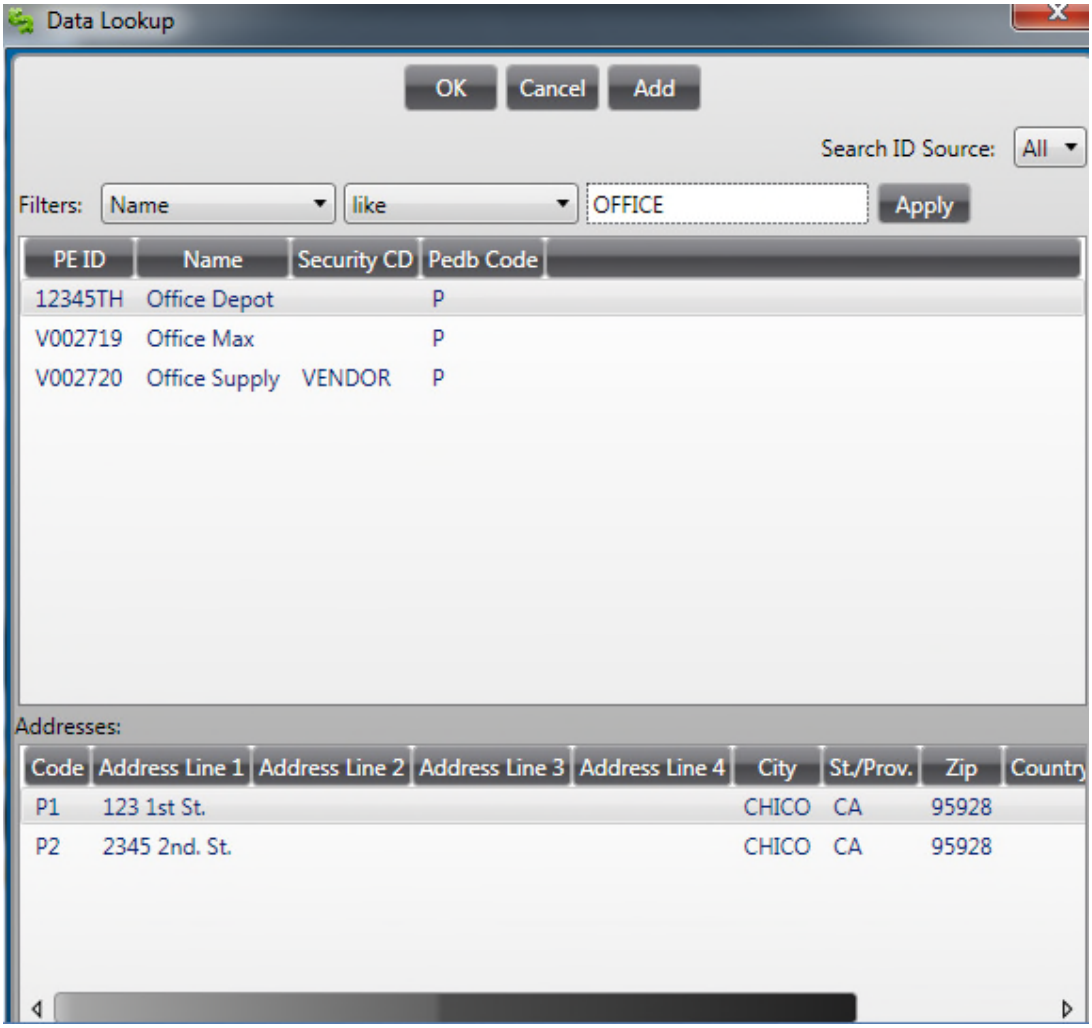
(2) Click in the 

field and then click on the 

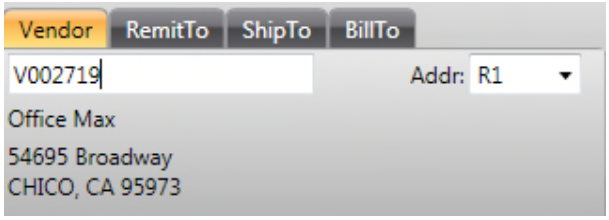
button.

Enter a portion of the vendors name (it is not necessary to enter the full name). Click Apply to display names matching the name entered.

*Using wildcards (**) is also an option when only a portion of the vendor's name is known. For example, if *Office* is typed the system finds each vendor that has the word [office] within the name. If the user types in Office* the system will find only the vendors that begin with the name Office.*

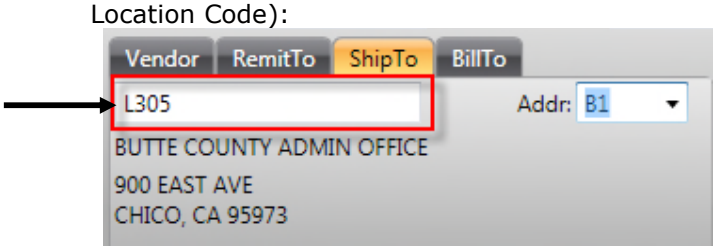


Select the appropriate ID by highlighting it and clicking OK. Double clicking will also pull the ID back into the record:



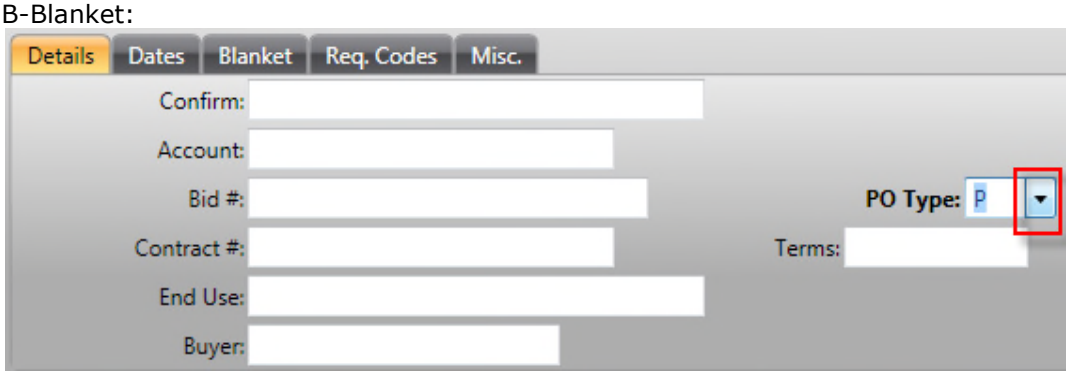
Note that all addresses defined for a vendor will be listed in the lower portion of this screen. The highlighted address is the one that will be brought into the record. Simply highlight the appropriate address if the default address is incorrect.

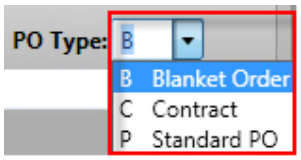
Ship to – The Ship To ID will be typed into the ShipTo Field, Lxxx (L-Ship To, XXX-Location Code):



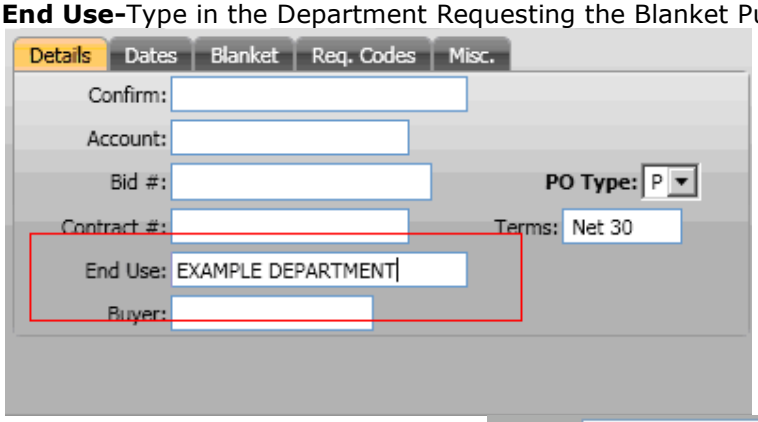
(1)Type in the ShipTo ID

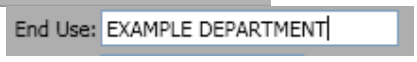
PO Type –This will default to P-Standard PO. For blanket purchase requisitions select B-Blanket:





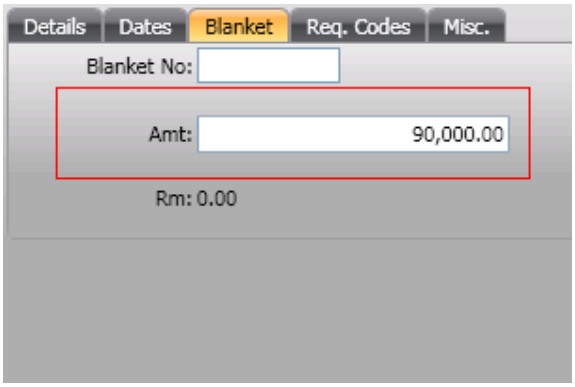
End Use-Type in the Department Requesting the Blanket Purchase Order:



(2) Type in the Deparment in the 

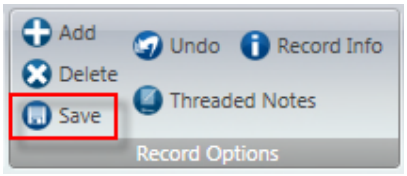
field

Blanket Amount – This field is only required if the PO Type is a B type (Blanket). Enter the full amount of the Blanket PO.



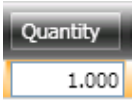
**Note: Do Not Enter anything in the Blanket PO # field, this field will not be used.

At this time pressing the save button will save the header portion of the requisition, however no money has been encumbered until a quantity and unit cost is entered with the account to be pre-encumbered:

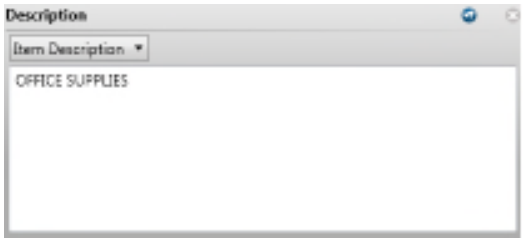


Make sure to note the PR number in case you must leave screen and locate record at a later time.

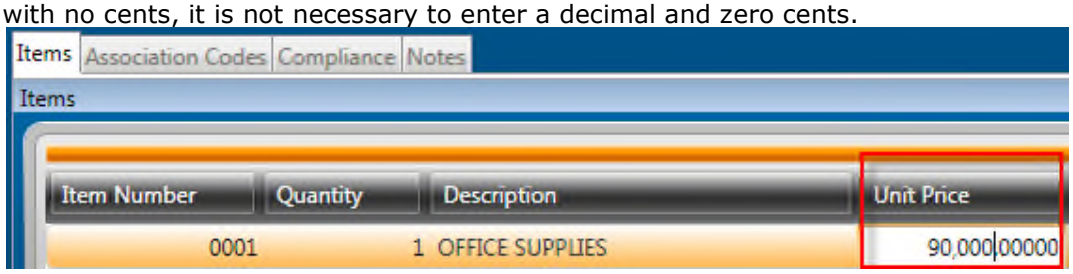
Quantity –For Blanket requisitions, enter a quantity of 1:

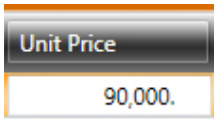
(1) Enter in the 

Description – For blankets, enter a general description of items being purchased (for example, Office Supplies).

(1) Enter the 

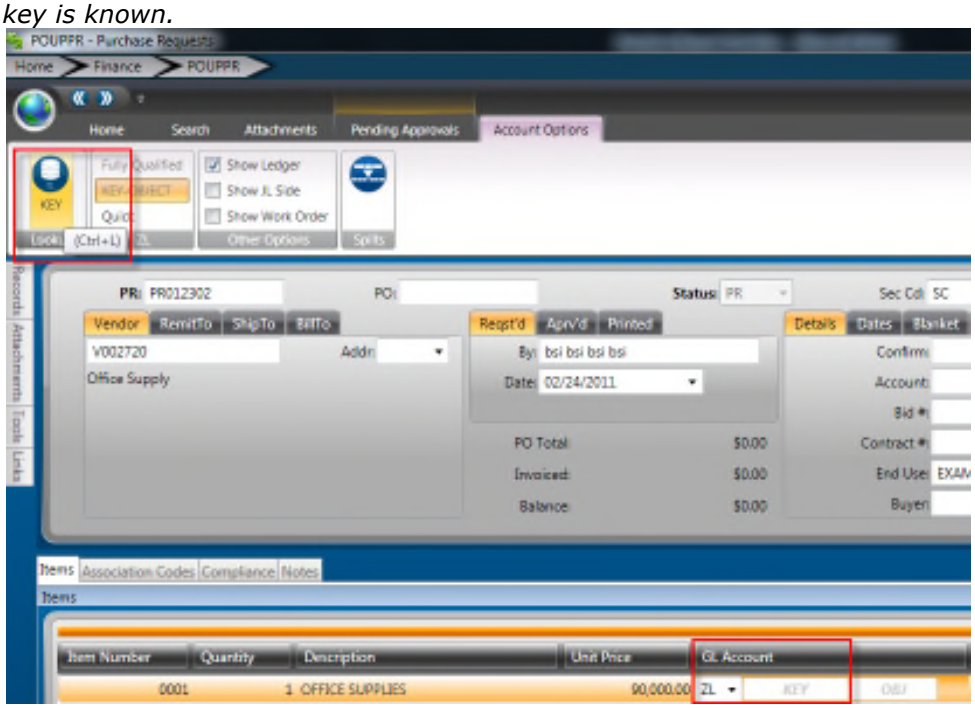
Unit Price – Enter the total blanket amount for the unit price. If entering a number with no cents, it is not necessary to enter a decimal and zero cents.



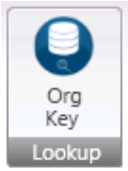
(2) Enter in 

Account – Enter the GL Org Key code and Object code to be encumbered for the blanket. If the numbers are known, simply type them into the appropriate field.

To see a list of available Keys, make sure your cursor is in the Key field first, then click on the LookUp button. A list will appear of account numbers for your department. Double-click on the appropriate code to have the system bring it onto the Purchase Request record. *Using wildcards (*) is also an option when only a portion of the of the key is known.*



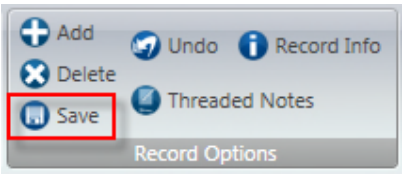
(1) Make sure your cursor is the

and select the 

Access the lookup for Object Codes by clicking on the LookUp button when the cursor is in the Object field. Select the appropriate Object Code by double clicking on it in the same fashion used to select the Key.

Save the Record

At this time pressing the save button will save the record.



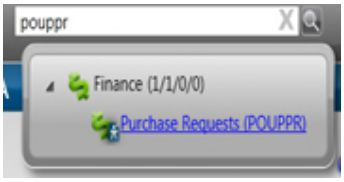
There will be times when the "Record Accepted" message is not received and a budget warning appears instead. These warnings are intended to inform the User that funds are not available and to take the necessary steps to move money into the account or choose another account to expense the purchase. Budget warnings can be overridden and the record saved by simply pressing the Enter key again until the "Record Accepted" message is received.

Skip to section 9 to add attachments or section 10 to submit PR to Workflow if there are no attachments for this requisition.

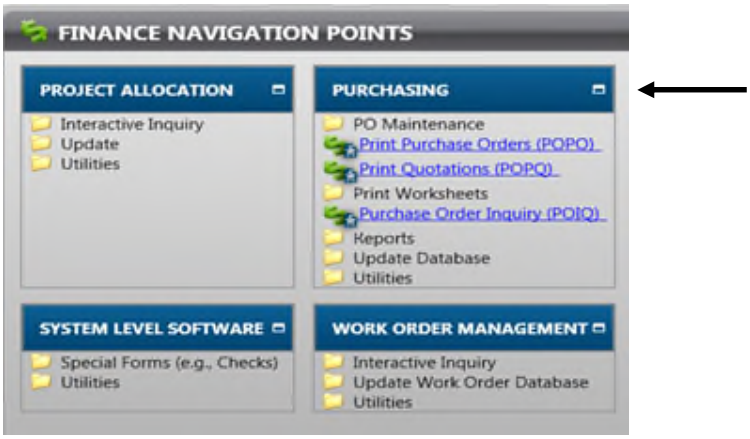
Section 3: Creating Contract Purchase Requisition

Contract PO Process

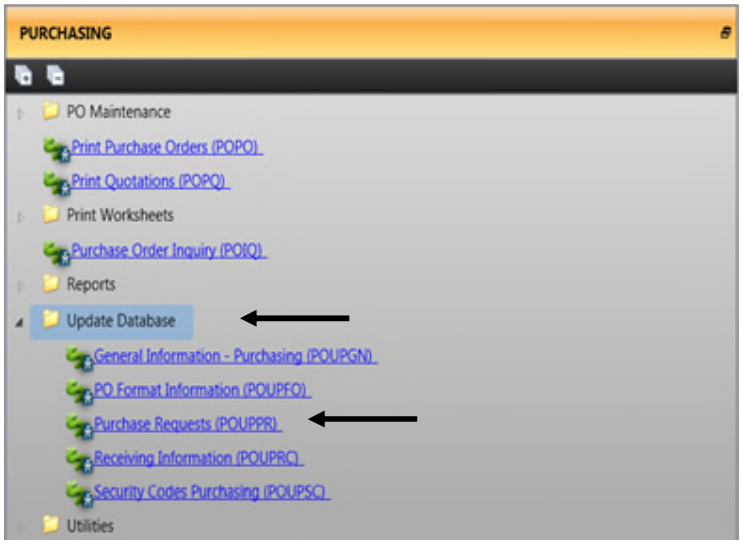
- The path to **Create Requisitions** is **POUPPR**, you can enter that in the search bar in the top right corner of the homescreen and click the "Enter " button from the keyboard and then click on Purchase Requests:



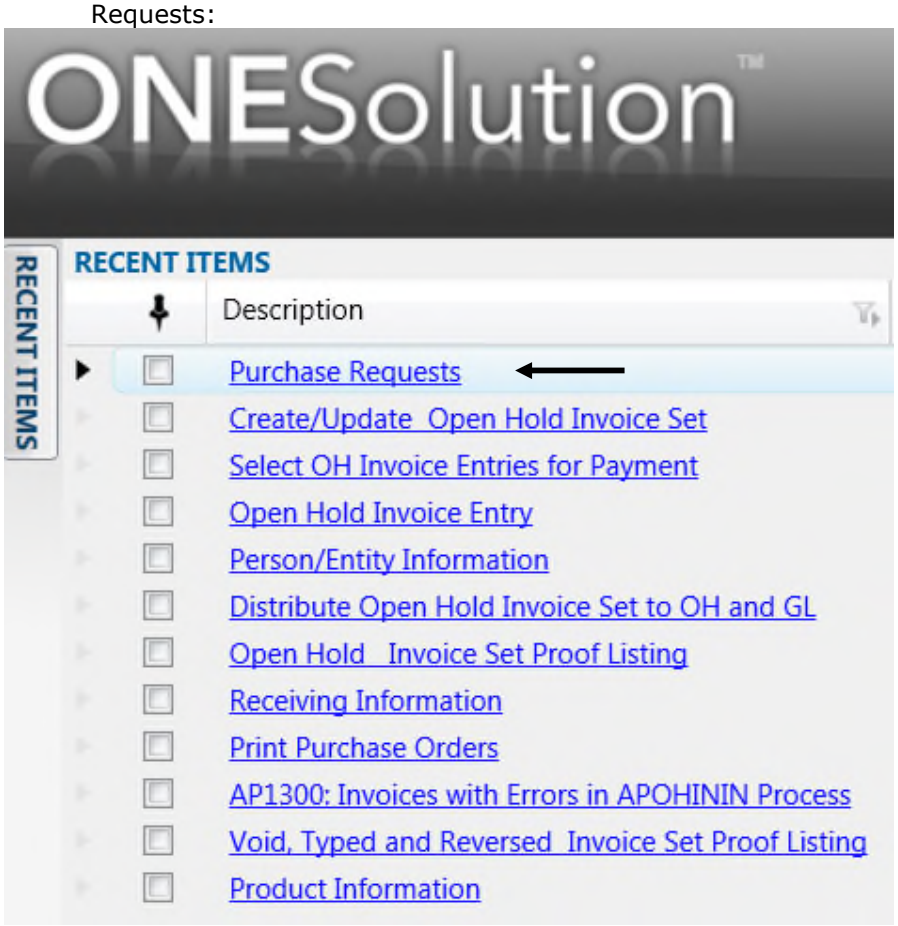
- Or click on the Finance icon in the bottom left corner of the screen which will open up the Finance Navigation Points and scroll until you reach the Purchasing Navigation point:



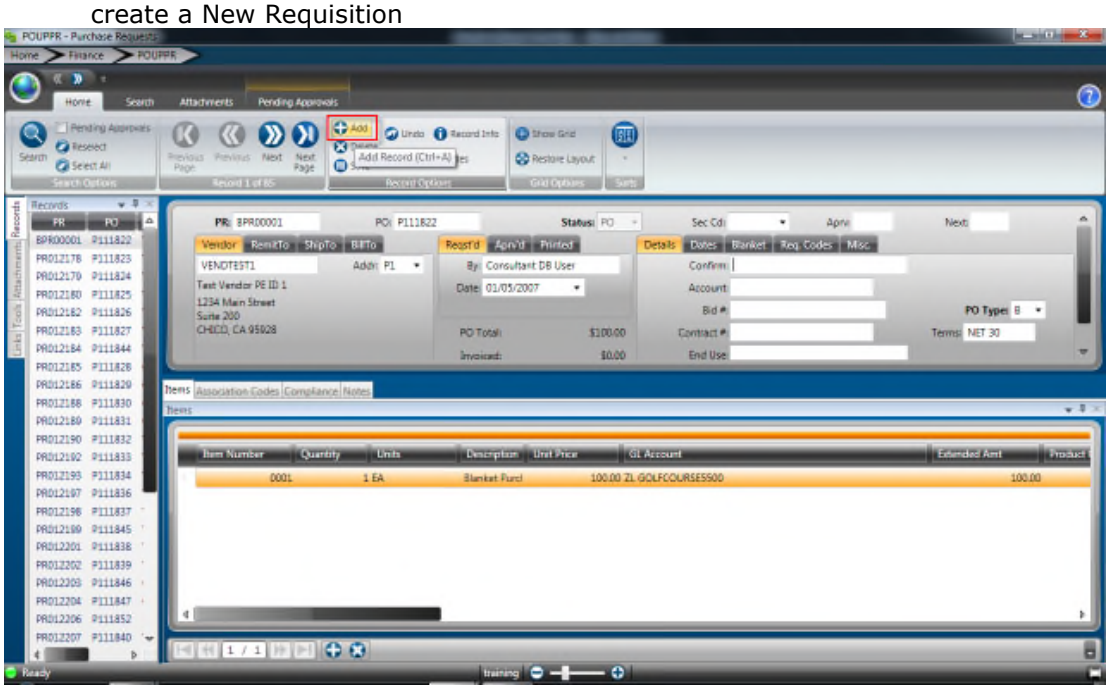
- Click on Update Database and then Purchase Requests:



- Or if you recently browsed the Purchase Request screen, go to your Recent Items tab on the left hand side of your screen, expand it, and click on Purchase Requests:

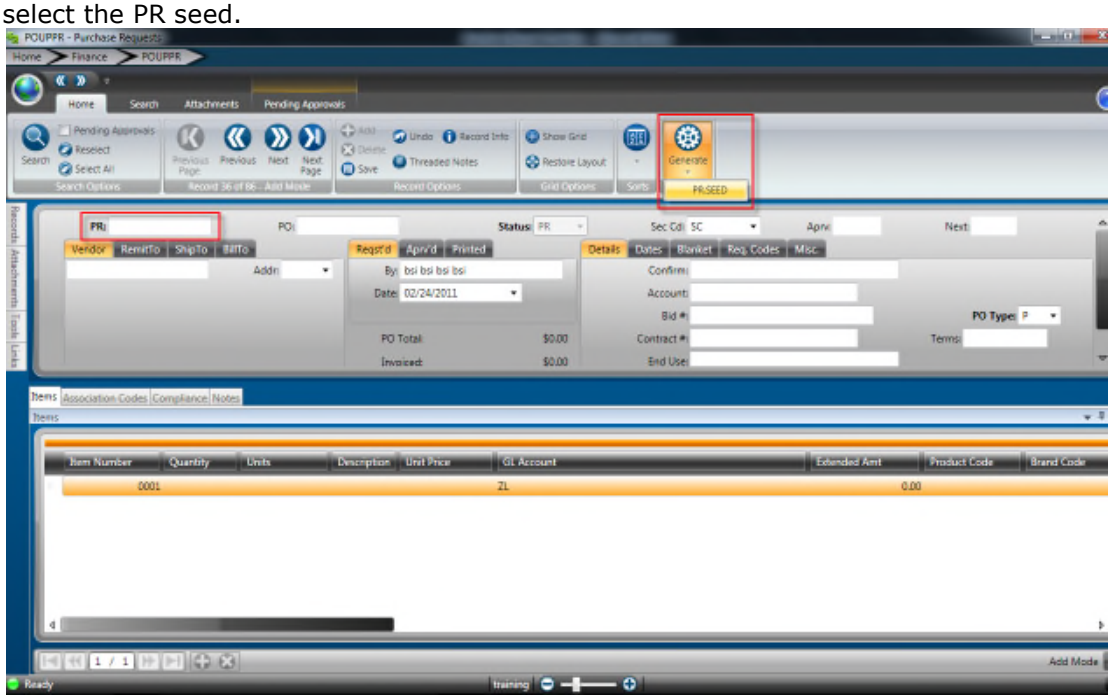


- Click on the ADD button from the Ribbon Bar, on the "+" sign/ "Add", button to create a New Requisition



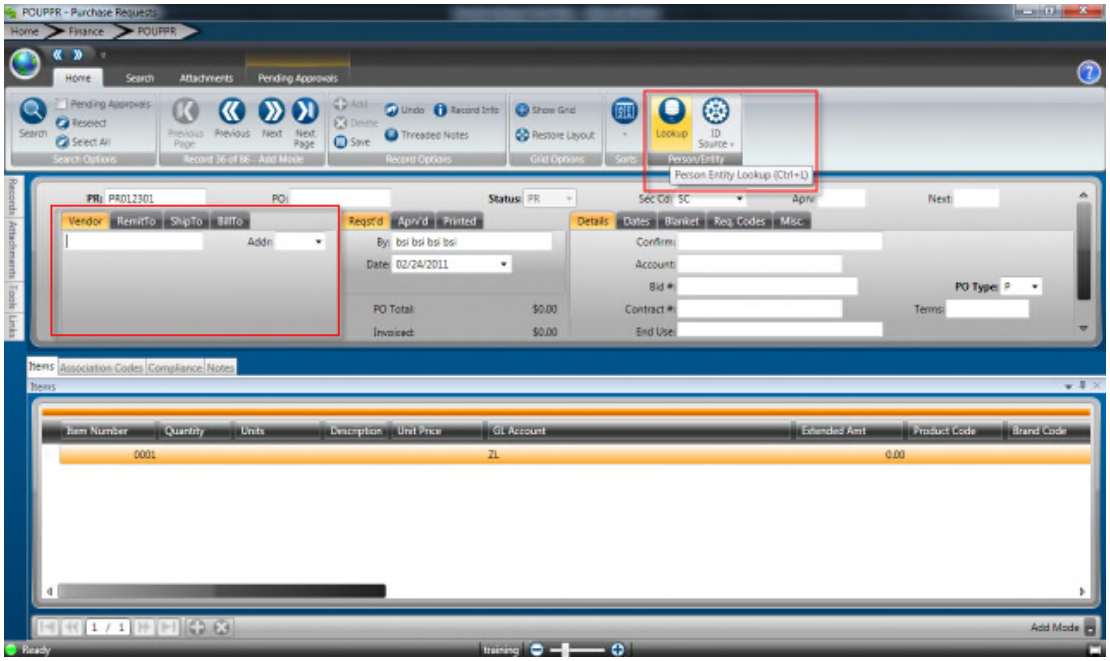
(3) Click on the Button.

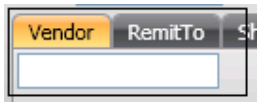
PR Number- The system will assign the next available number. Click on the PR field then the click on the "Generate" button from the Ribbon Bar. Select the drop down to select the PR seed.

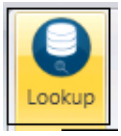


(3) Click on the field and then click on the

Vendor- Click on the Vendor field then click on the Lookup icon from the Ribbon Bar to enter the vendor the contract is with:



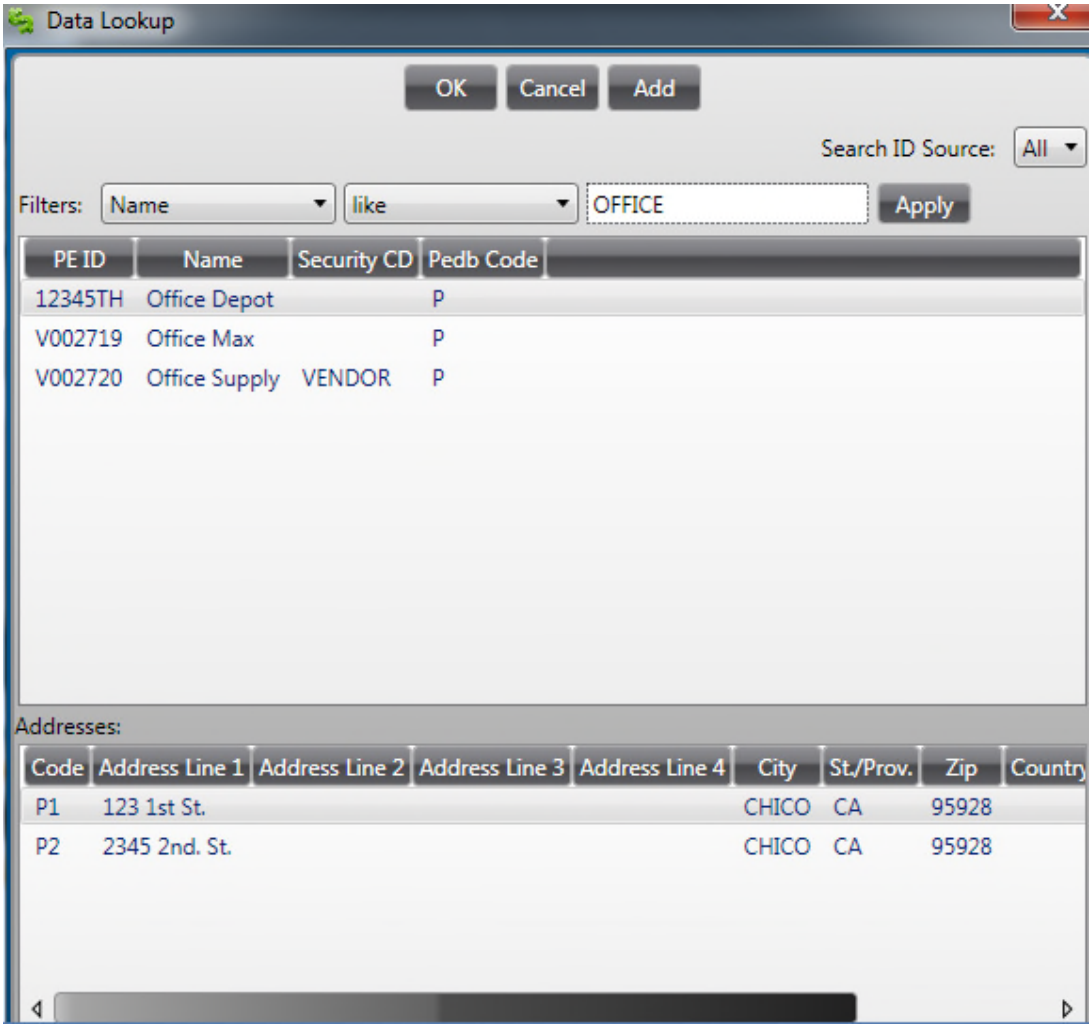
(3) Click in the 

field and then click on the 

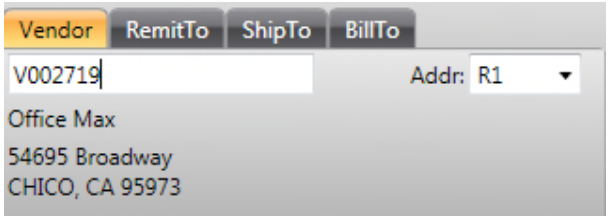
button.

Enter a portion of the vendors name (it is not necessary to enter the full name). Click Apply to display names matching the name entered.

*Using wildcards (**) is also an option when only a portion of the vendor's name is known. For example, if *Office* is typed the system finds each vendor that has the word [office] within the name. If the user types in Office* the system will find only the vendors that begin with the name Office.*

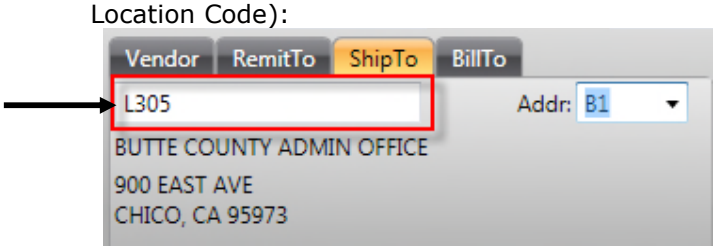


Select the appropriate ID by highlighting it and clicking OK. Double clicking will also pull the ID back into the record:



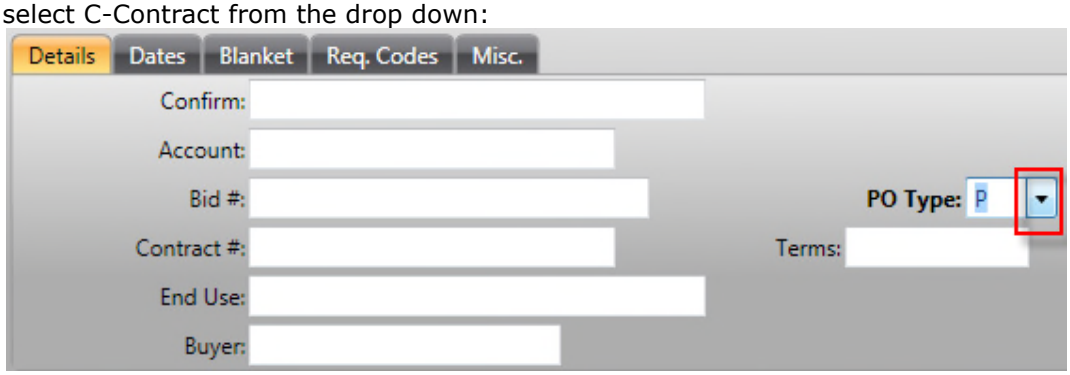
Note that all addresses defined for a vendor will be listed in the lower portion of this screen. The highlighted address is the one that will be brought into the record. Simply highlight the appropriate address if the default address is incorrect.

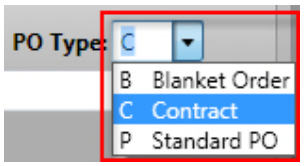
Ship to – The Ship To ID will be typed into the ShipTo Field, Lxxx (L-Ship To, XXX-Location Code):



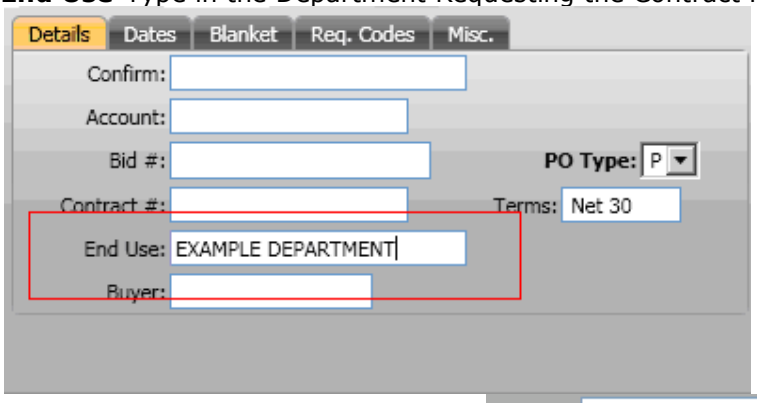
(1)Type in the ShipTo ID

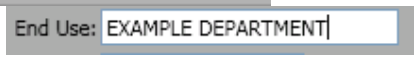
PO Type –This will default to P-Standard PO. For contract purchase requisitions select C-Contract from the drop down:





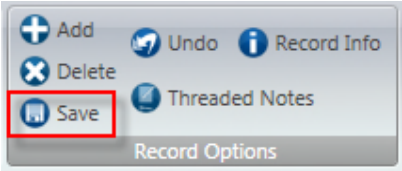
End Use-Type in the Department Requesting the Contract Purchase Order



(3) Type in the Deparment in the 

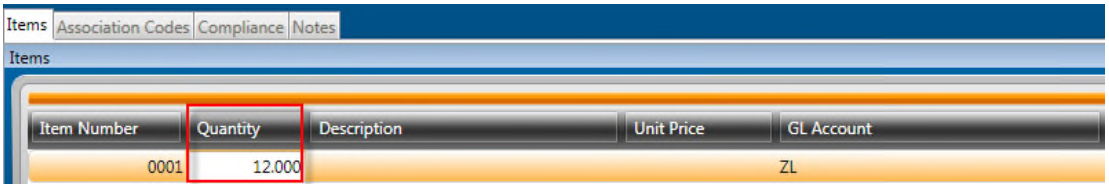
field.

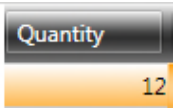
At this time pressing the save button will save the header portion of the requisition, however no money has been encumbered until a quantity and unit cost is entered with the account to be pre-encumbered



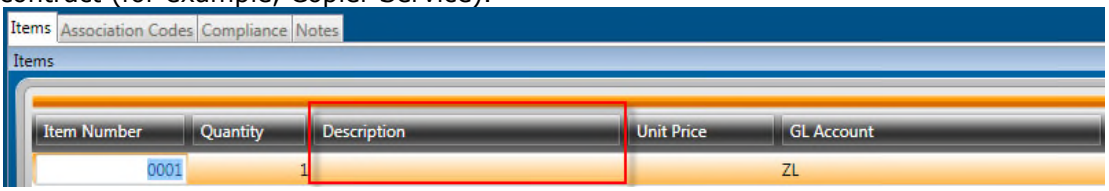
Make sure to note the PR number in case you must leave screen and locate record at a later time.

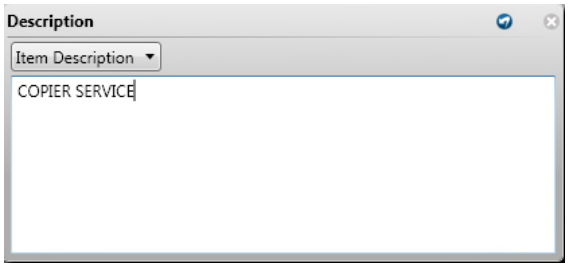
Quantity –For Contract requisitions, the quantity will be the length of the contract. For example a 12 month copier service contract will have a quantity of 12.



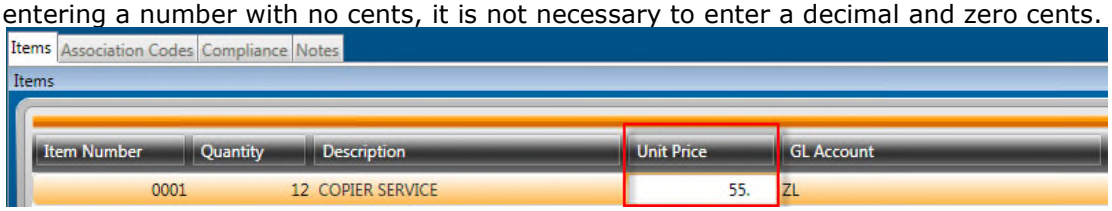
(1) Enter in the 

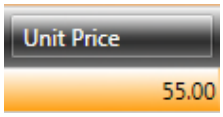
Description – For contracts, enter a description of the service items relating to the contract (for example, Copier Service).



(1) Enter the 

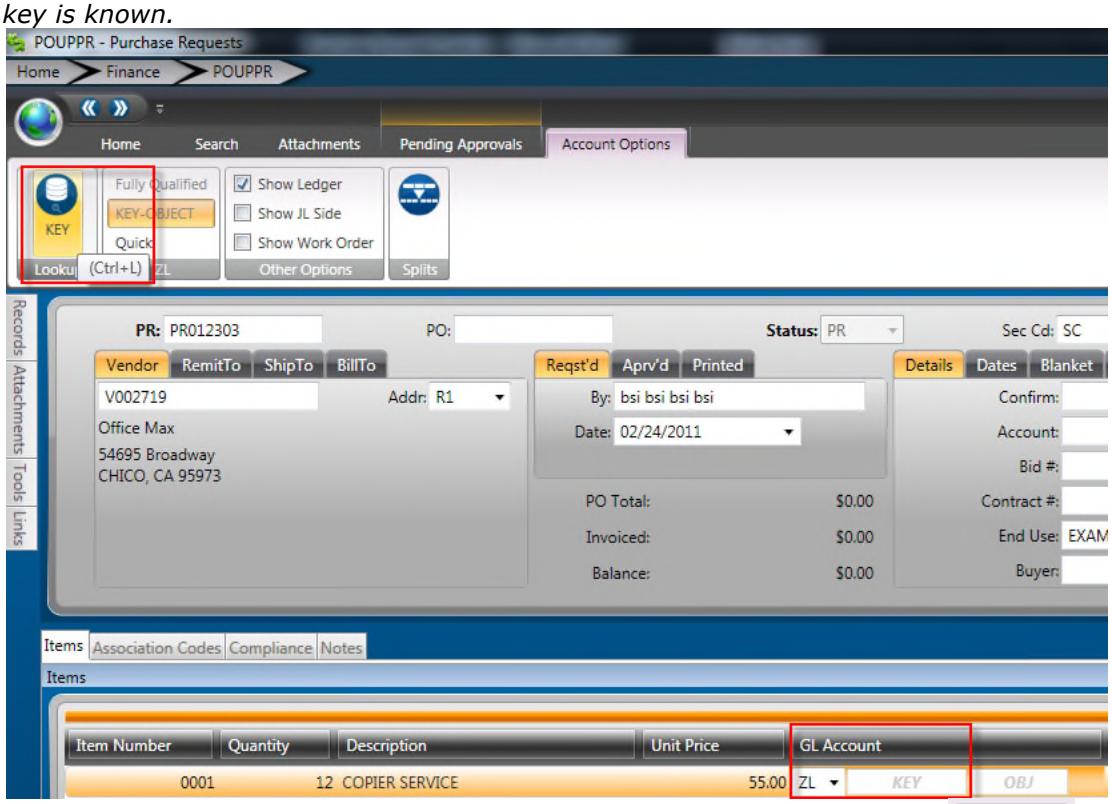
Unit Price – Enter the dollar amount of the charge for the service. For example, the copier service will be $55/month for 12 months so the unit price would be 55. If entering a number with no cents, it is not necessary to enter a decimal and zero cents.



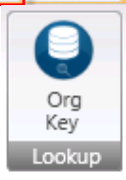
(3) Enter in 

Account – Enter the GL Org Key code and Object code to be encumbered for the contract. If the numbers are known, simply type them into the appropriate field.

To see a list of available Keys, make sure your cursor is in the Key field first, then click on the LookUp button. A list will appear of account numbers for your department. Double-click on the appropriate code to have the system bring it onto the Purchase Request record. *Using wildcards (*) is also an option when only a portion of the of the key is known.*



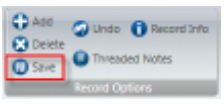
(1) Make sure your cursor is the

and select the 

Access the lookup for Object Codes by clicking on the LookUp button when the cursor is in the Object field. Select the appropriate Object Code by double clicking on it in the same fashion used to select the Key.

Save the Record

At this time pressing the save button will save the record.



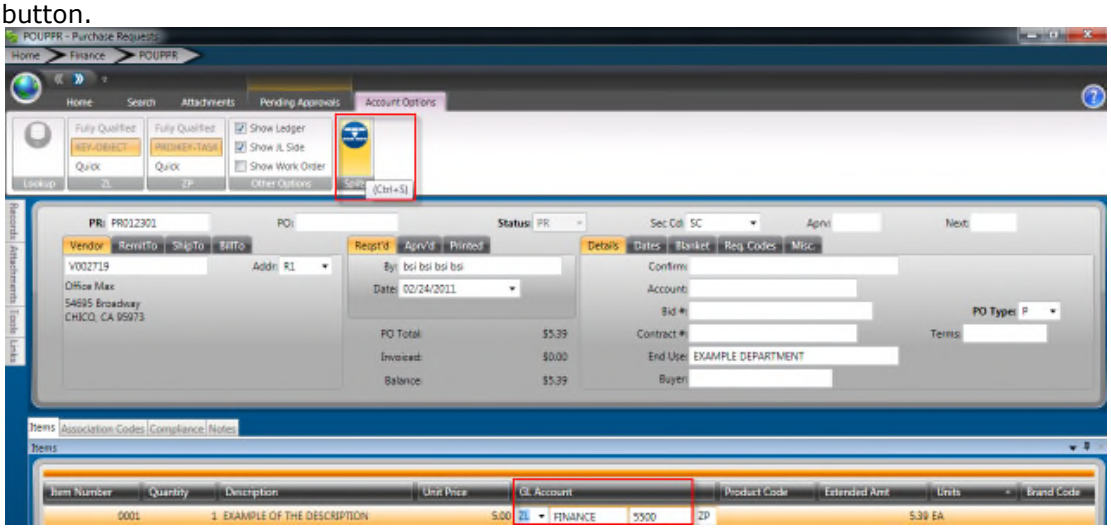
There will be times when the "Record Accepted" message is not received and a budget warning appears instead. These warnings are intended to inform the User that funds are not available and to take the necessary steps to move money into the account or choose another account to expense the purchase. Budget warnings can be overridden and the record saved by simply pressing the Enter key again until the "Record Accepted" message is received.

Skip to section 9 to add attachments or section 10 to submit PR to Workflow if there are no attachments for this requisition.

Section 4: Entering Account Splits

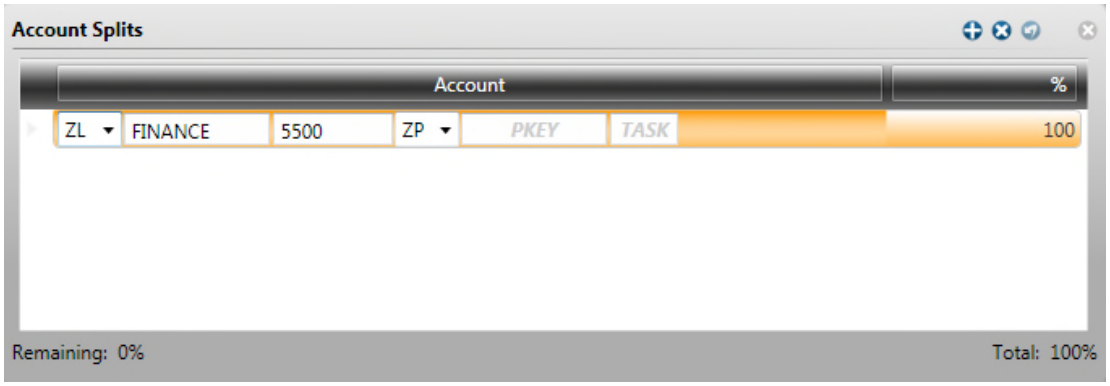
This guide is intended to walk you through the process of entering account number splits in purchasing. Item expenses can be split to multiple accounts by either dollar amounts or percentages.

With the cursor in the Key Code field, click on the LookUp button. Click on 'Splits' button.

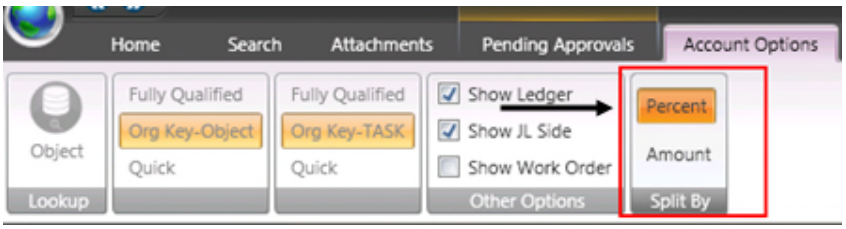


Splitting Accounts by Percentages

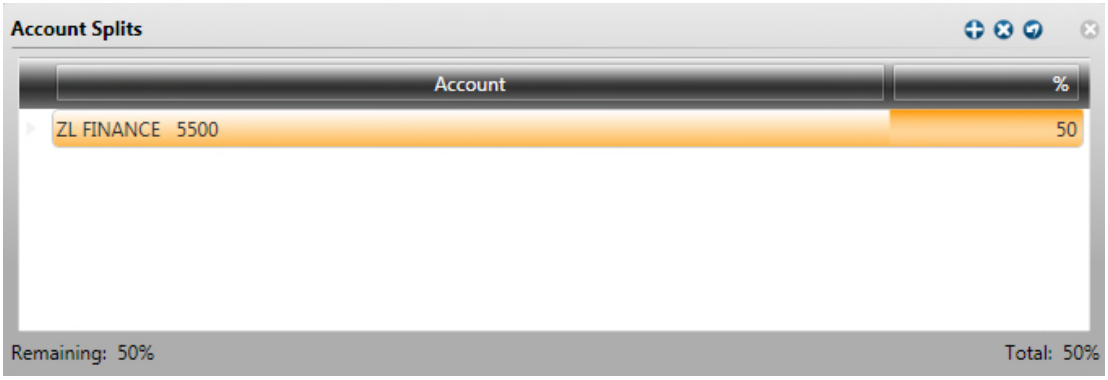
After indicating a line item is to be charged to multiple accounts, a popup displays that contains the key, object, and amount/percentage. Notice that this field defaults to 'Amount'.



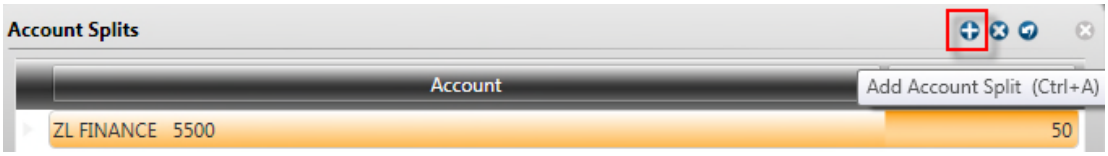
Change the 'percent' button on the ribbon bar



In the account splits window enter the percentage of the expense you want to charge to this account:

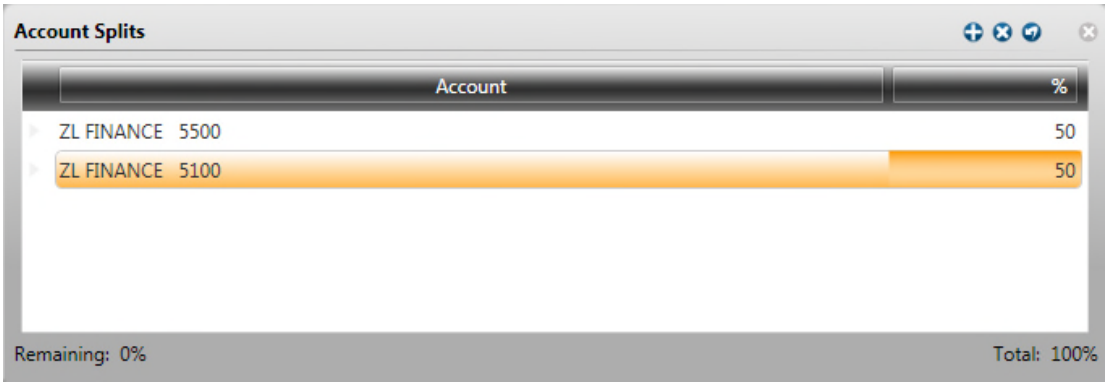


To enter the next account number in the split, click the plus icon. The system will add another line for the Key, Object and Percent fields to allow the user to enter the next account.



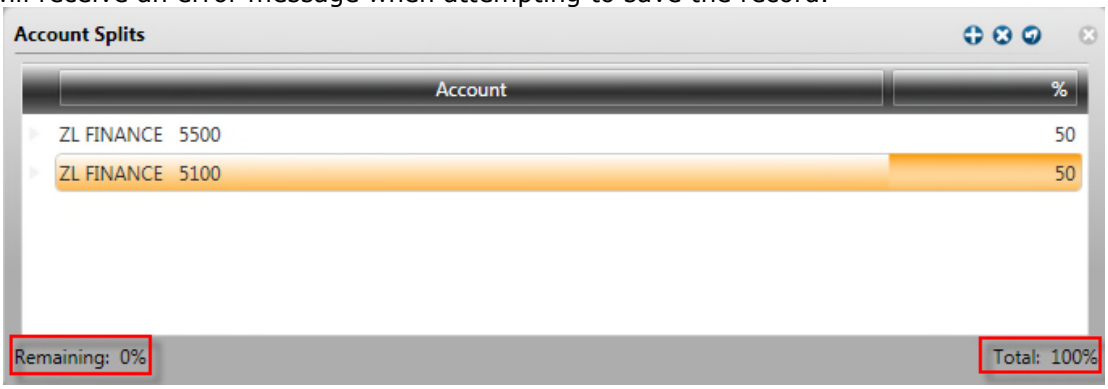
1. Enter a Org Key in the Key field.
2. Enter an Object code in the Obj field.
3. Next, enter the remaining percentage of the expense you want to charge to this account. *It is not necessary to enter a percent sign.*

   (1) Click on

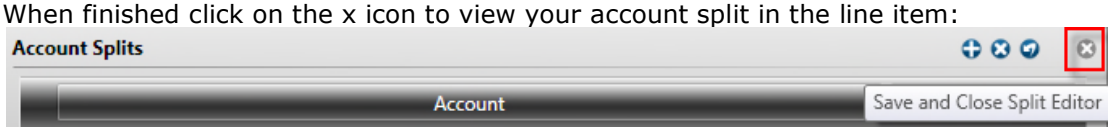


4. For each additional account, repeat these steps. You may have as many accounts in your split as needed as long as they add up to 100%.

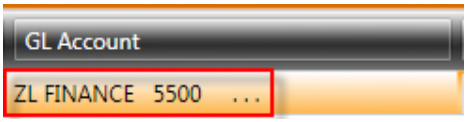
5. Notice that the total percentage on the bottom right corner is 100% and the remaining percentage is 0% in the bottom left corner. If this does not add up, you will receive an error message when attempting to save the record.



When finished click on the x icon to view your account split in the line item:

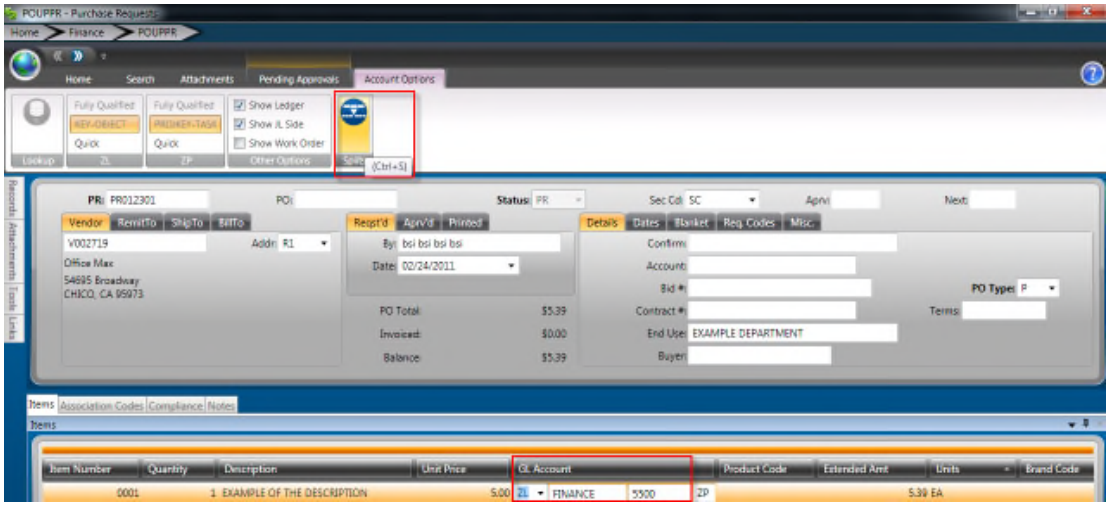


Notice the (...) after the first account number. This indicates an account split for the line item:

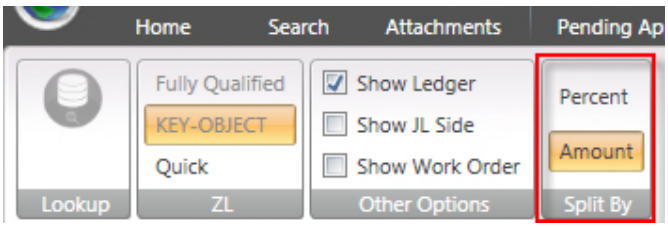


Split Accounts by Amount

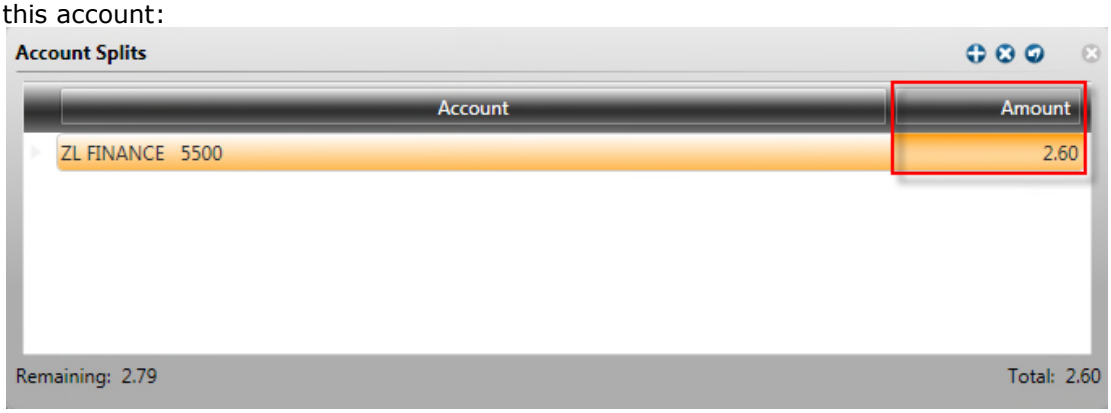
With the cursor in the Key Code field, click on the LookUp button. Click on 'Splits' button.



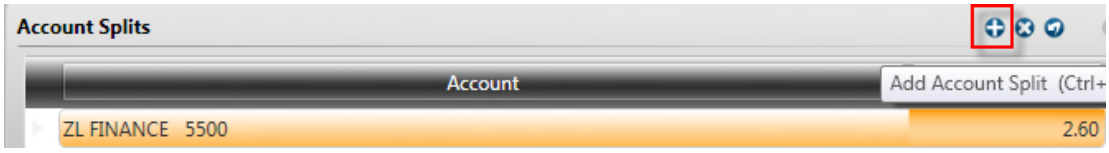
The account split defaults to 'Amount' which is displayed on the ribbon bar:



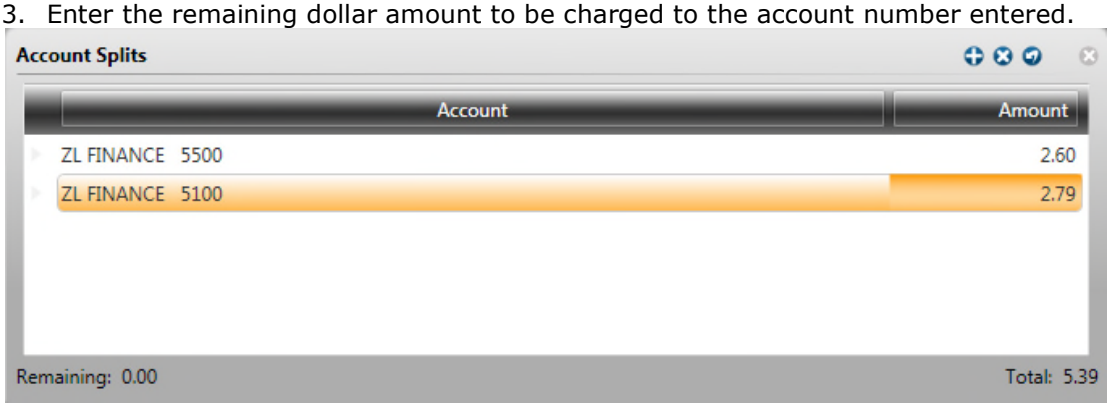
In the account splits window enter the amount of the expense you want to charge to this account:



To enter the next account number in the split, click the plus icon. The system will add another line for the Key, Object and Amount fields to allow the user to enter the next account.

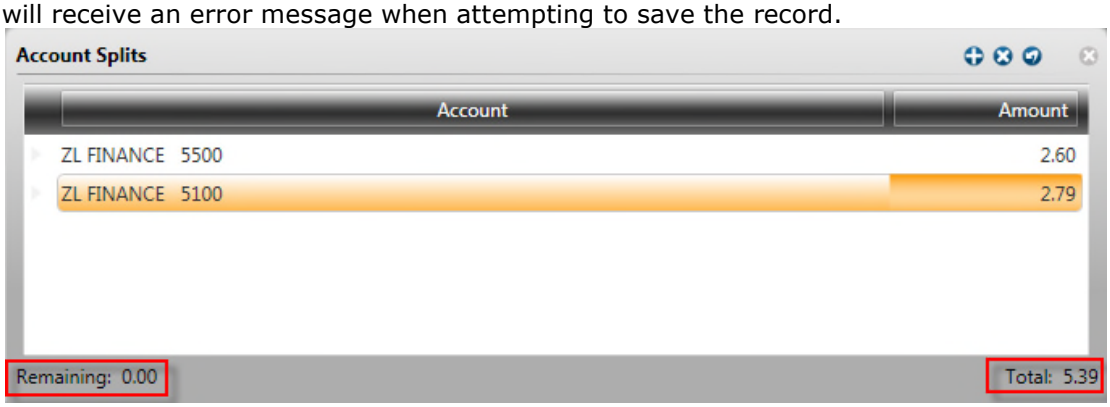


1. Enter an Org Key in the Key field.
2. Enter an Object code in the Obj field.
3. Enter the remaining dollar amount to be charged to the account number entered.

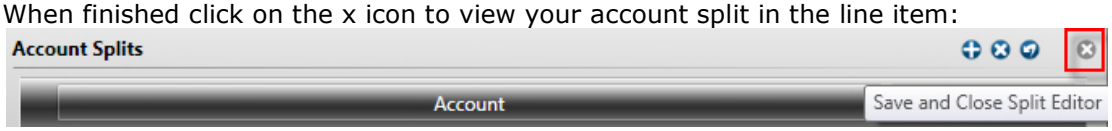


4. For each additional account, repeat these steps. You may have as many accounts in your split as needed as long as they add up to the line item total amount.

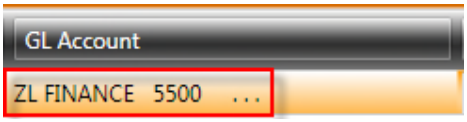
5. Notice that the total percentage on the bottom right corner is 100% and the remaining percentage is 0% in the bottom left corner. If this does not add up, you will receive an error message when attempting to save the record.



When finished click on the x icon to view your account split in the line item:

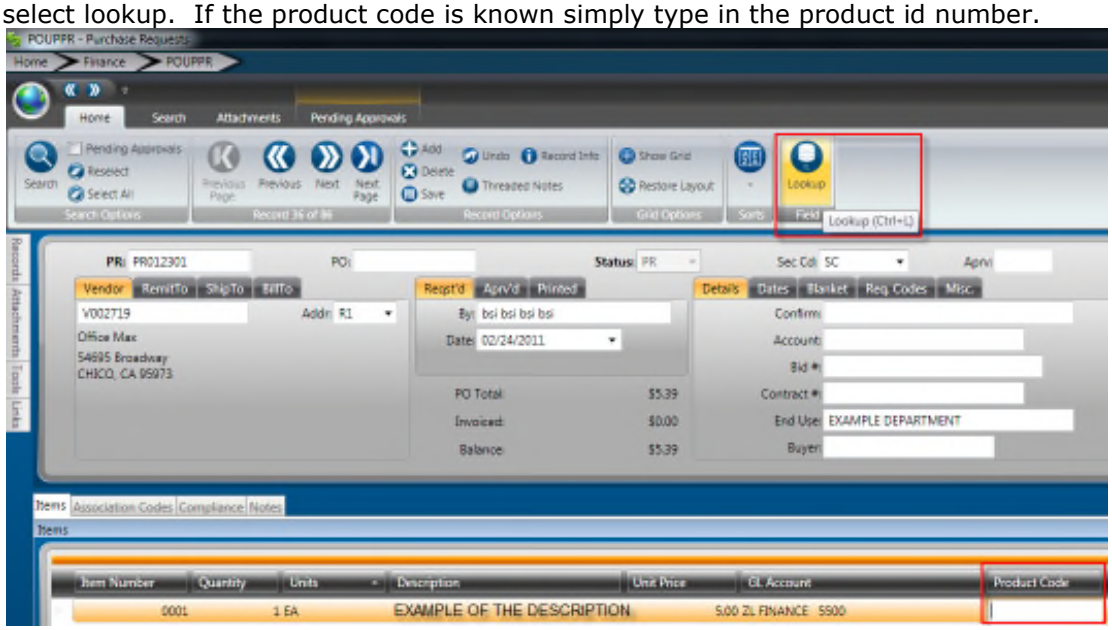


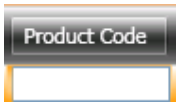
Notice the (...) after the first account number. This indicates an account split for the line item:



Section 5: Using Product Codes

Product ID – If a product code is being used make sure the cursor is in the field and select lookup. If the product code is known simply type in the product id number.



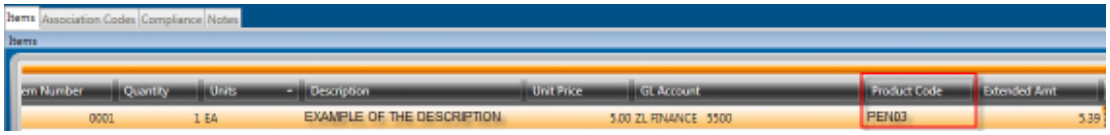
(1) Click in the 

field and select

Enter a portion of the description (it is not necessary to enter the full description). Click Apply to display the products matching that have the description entered.

*Using wildcards (**) is also an option when only a portion of the product description is known. For example, if *pen* is typed the system finds each product that has the word [pen] within the description.*

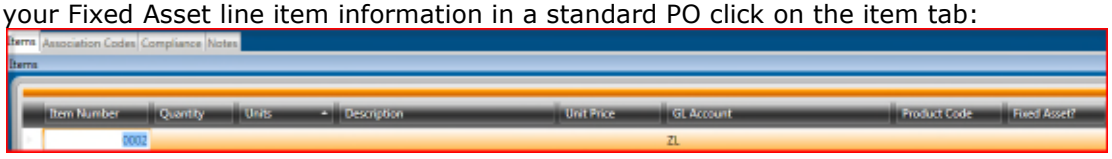
Select the appropriate Product Code by double clicking on it or clicking on OK.



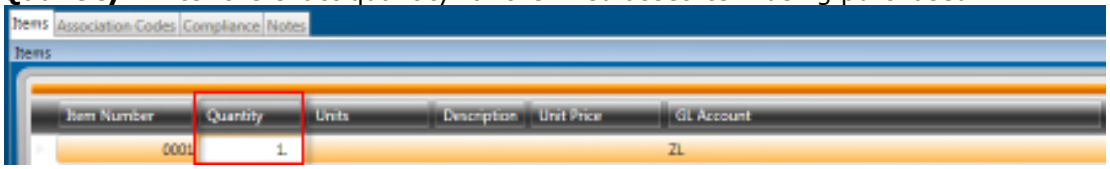
Note: If the product code is used the description and units of measure will populate for that product.

Section 6: Entering a Fixed Asset in a PO

Enter a standard PO by following the steps on page 3-8. Once you are ready to enter your Fixed Asset line item information in a standard PO click on the item tab:

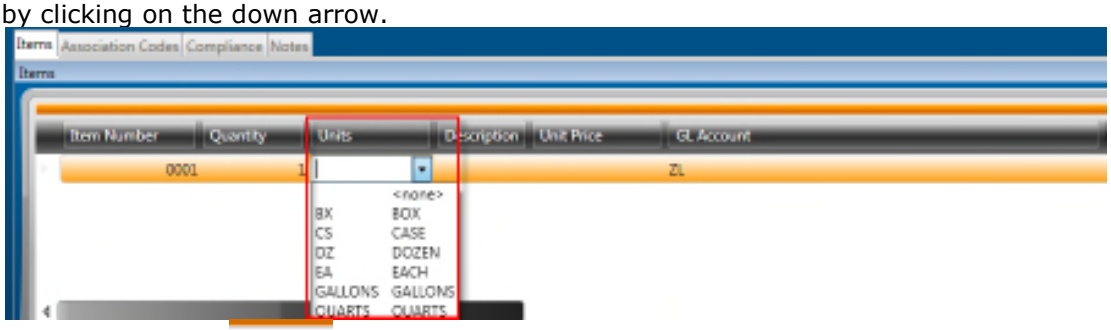


Quantity –Enter the exact quantity for the fixed asset item being purchased:



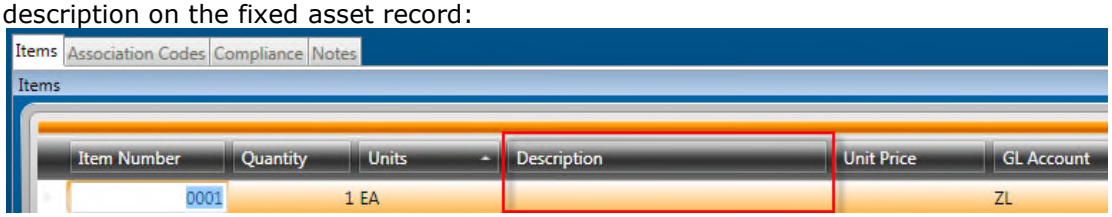
(1) Enter in the

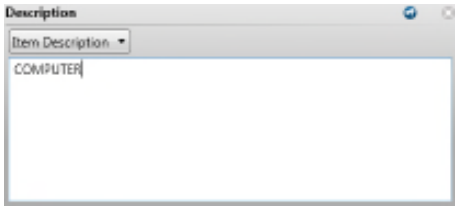
Unit – Select the appropriate unit of measure from the drop down list. Access the list by clicking on the down arrow.



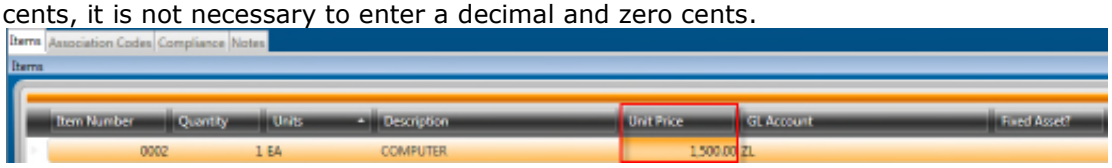
(2) Select the

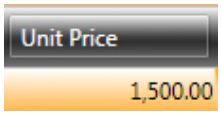
Description – Enter the description of the fixed asset. This description will also be the description on the fixed asset record:



(1) Enter the 

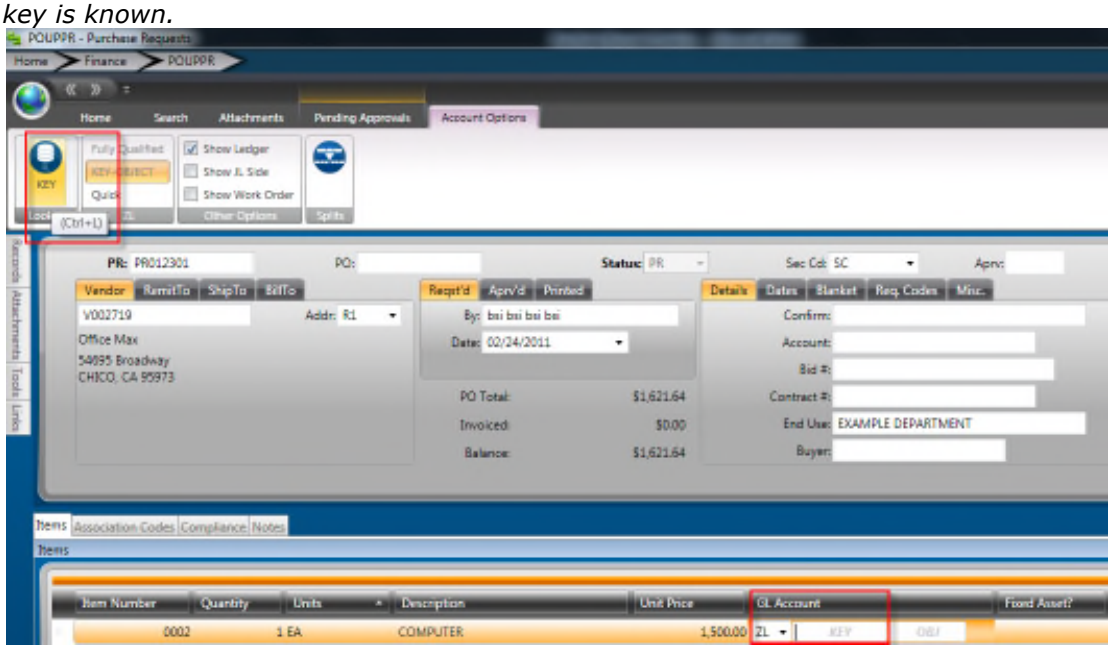
Unit Price – Enter the dollar amount for the unit price. If entering a number with no cents, it is not necessary to enter a decimal and zero cents.



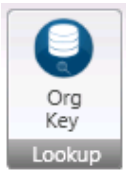
(4) Enter in 

Account – Enter the GL Org Key code and Object code to be encumbered for the purchase. If the numbers are known, simply type them into the appropriate field.

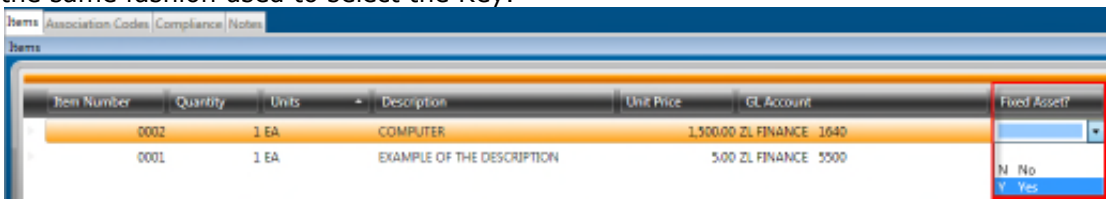
To see a list of available Keys, make sure your cursor is in the Key field first, then click on the LookUp button. A list will appear of account numbers for your department. Double-click on the appropriate code to have the system bring it onto the Purchase Request record. *Using wildcards (*) is also an option when only a portion of the of the key is known.*



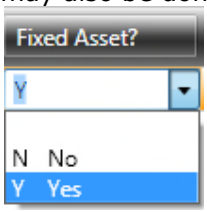
(1) Make sure your cursor is the

and select the 

Access the lookup for Object Codes by clicking on the LookUp button when the cursor is in the Object field. Select the appropriate Object Code by double clicking on it in the same fashion used to select the Key.



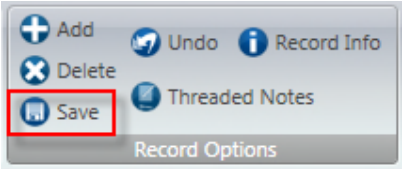
Object codes and dollar amount combinations may be set up to auto flag a line item in the Fixed Asset column through common code-POFA/CONTROL. Flagging the asset may also be done manually by selecting the Y-Yes in the Fixed Asset column:



NOTE: This flag must be set for the system to auto create the FA record in FAUPAS.

Save the Record

At this time pressing the save button will save the record.



If additional line items are necessary, simply go to the next line on the grid and repeat the steps outlined for data entry of Item Information. The system automatically numbers the next line item in anticipation of additional records.

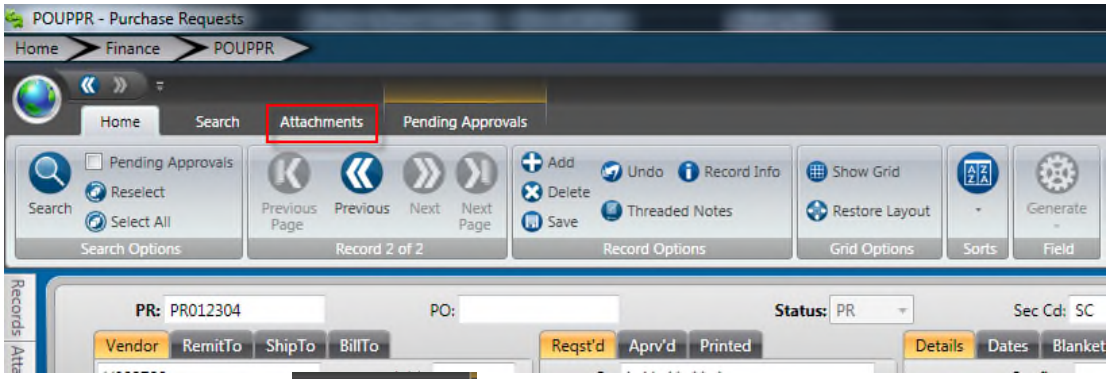
There will be times when the "Record Accepted" message is not received and a budget warning appears instead. These warnings are intended to inform the User that funds are not available and to take the necessary steps to move money into the account or choose another account to expense the purchase. Budget warnings can be overridden and the record saved by simply pressing the Enter key again until the "Record Accepted" message is received.

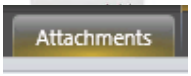
Once all line items are entered, skip to section 9 to add attachments or section 10 to submit PR to Workflow if there are no attachments for this requisition. NOTE:To receive on Fixed Assets see section 14

Section 9: Attachments

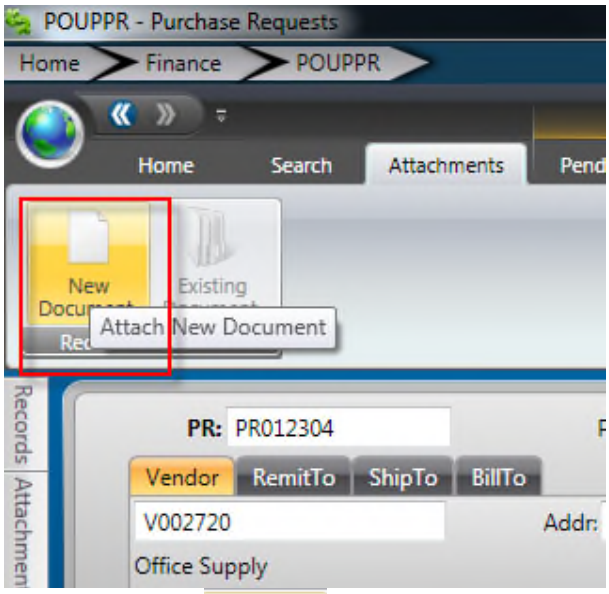
Attachments are your supporting documentation such as:
Quotes
Sole Source Letter
Agreement/Contract
Resolution
Co-Op Agreement

1. To attach these documents click on the Attachments tab from the ribbon bar



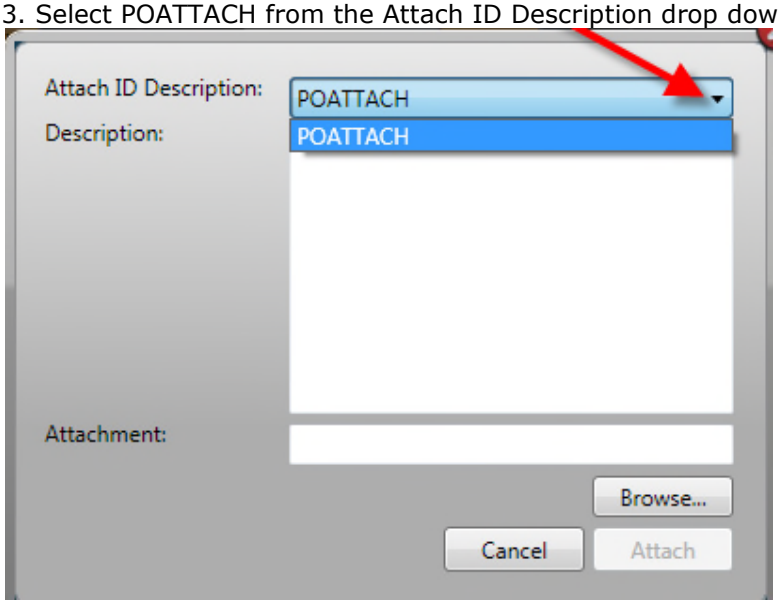
(1) Click on 

2. Click on New Document:

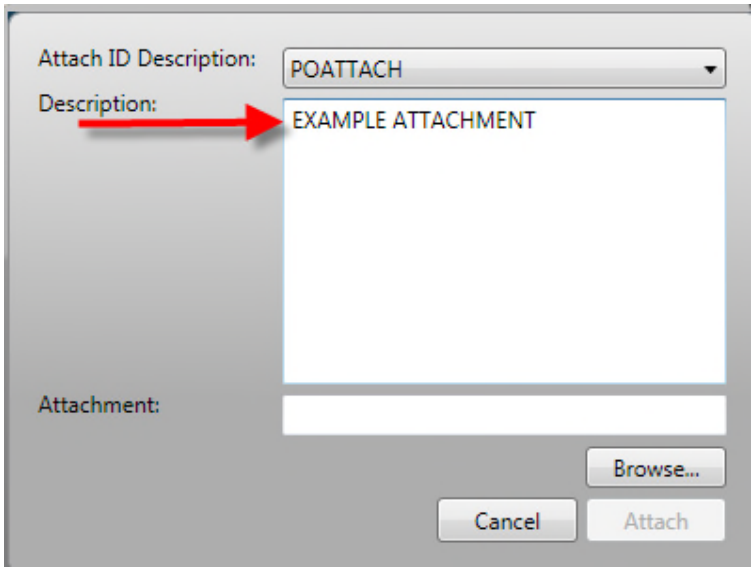


(1) Click on

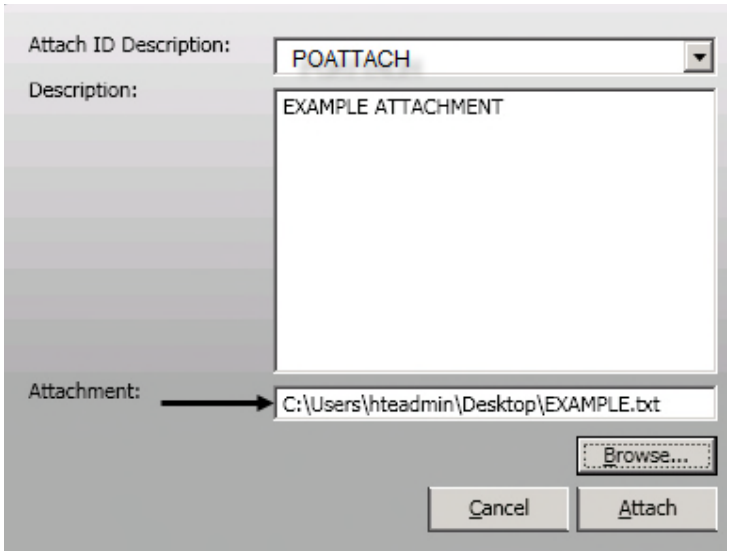
3. Select POATTACH from the Attach ID Description drop down:



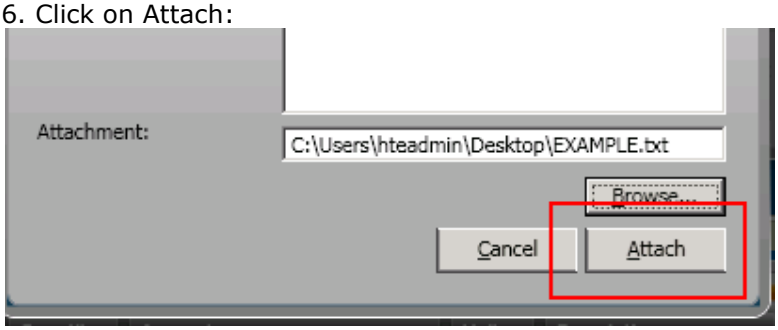
4. Enter in a Description of the attachment:


Attach ID Description:
POATTACH
Description:
EXAMPLE ATTACHMENT
Attachment:
Browse...
Cancel
Attach

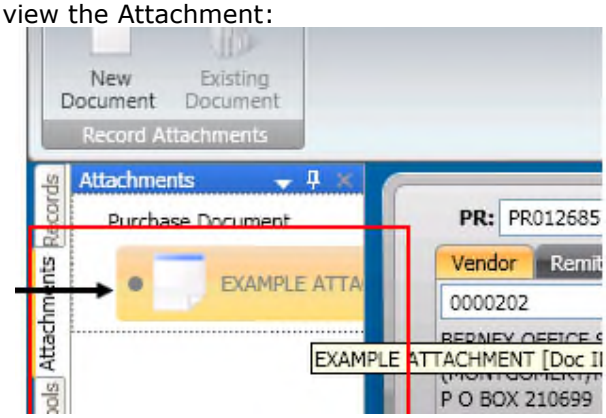
6. Browse for the document to be attached and select it:

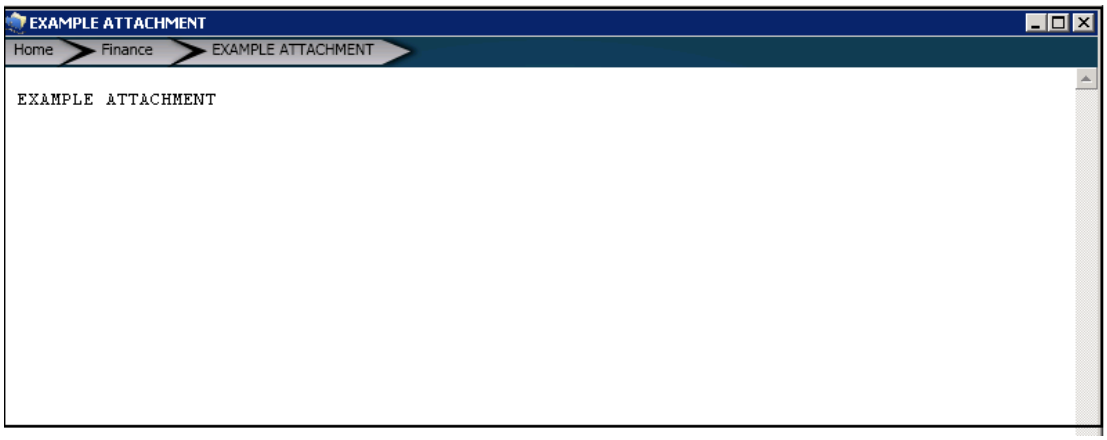


6. Click on Attach:



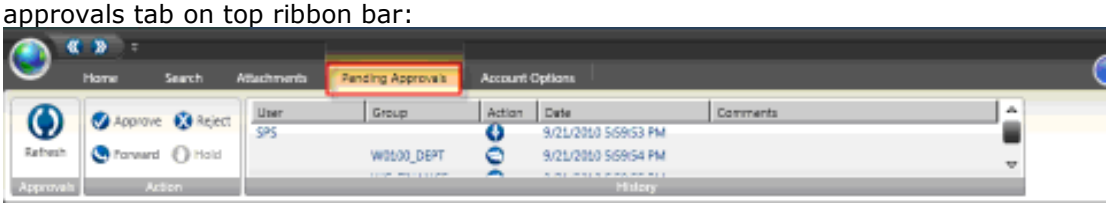
7. Under Attachments on the Side Bar the Attachment will appear. Click on the link to view the Attachment:



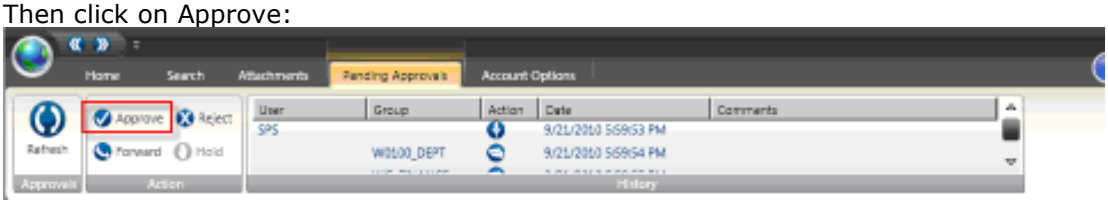

EXAMPLE ATTACHMENT
Home
Finance
EXAMPLE ATTACHMENT
EXAMPLE ATTACHMENT

Section 10: Workflow Approvals

(1) **Approvals**- To submit the Purchase Requisition for approval click on the pending approvals tab on top ribbon bar:

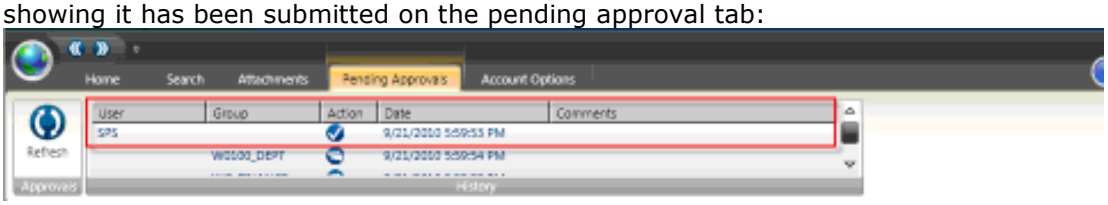


Then click on Approve:



Write any necessary comments in the comments window and then click on the Submit Button:

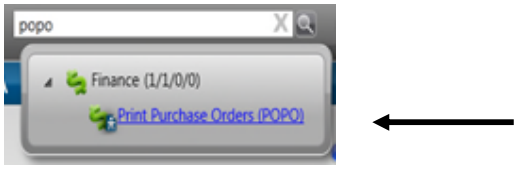
The system will display a check next to the requisition that has been sent to Workflow showing it has been submitted on the pending approval tab:



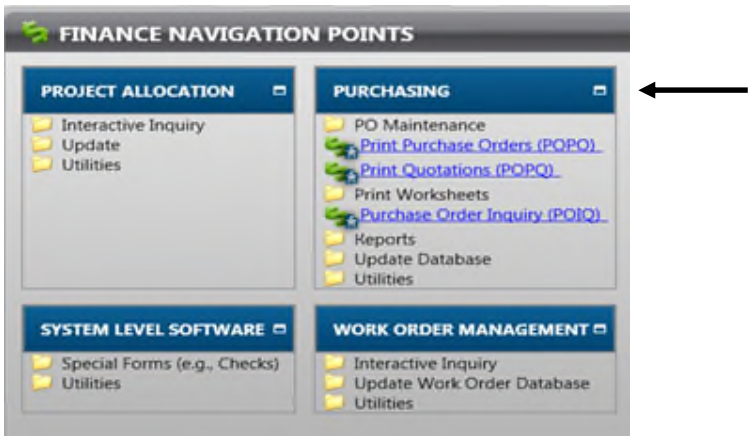
Section 11: PR/PO Printing

Print Purchase Order Process

- The path to **Print a Purchase Order** is **POPO**, you can enter that in the search bar in the top right corner of the homescreen and click the "Enter " button from the keyboard and then click on Print Purchase Orders:

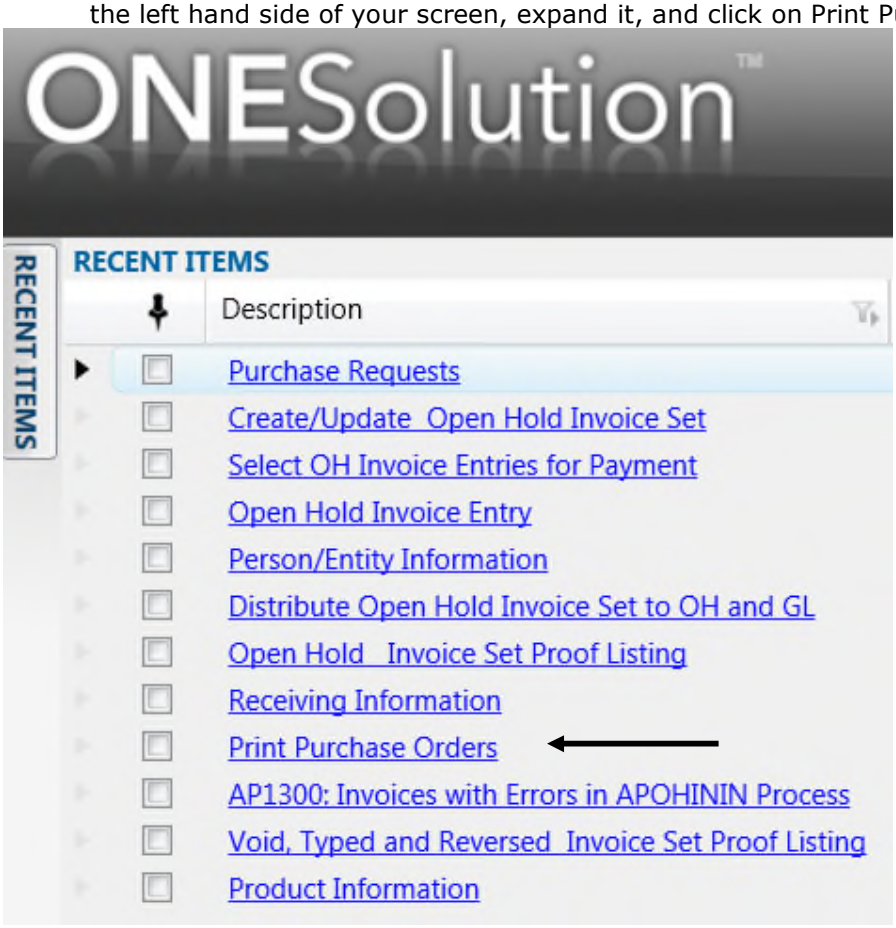


- Or click on the Finance icon in the bottom left corner of the screen which will open up the Finance Navigation Points and scroll until you reach the Purchasing Navigation point:



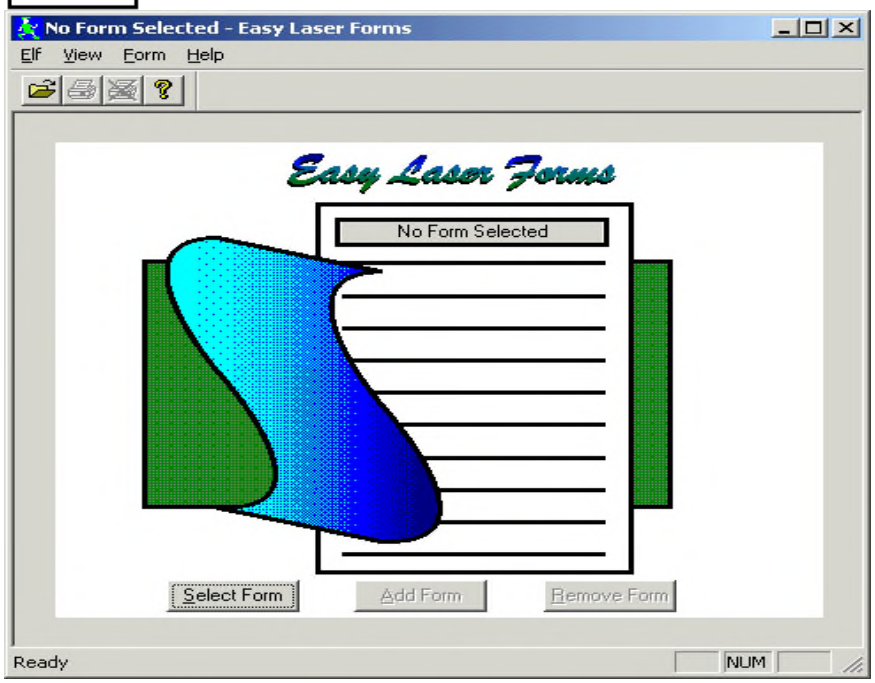
- Click on Print Purchase Orders (POPO):

- Or if you recently utilized the POPO function, go to your Recent Items tab on the left hand side of your screen, expand it, and click on Print Purchase Orders:

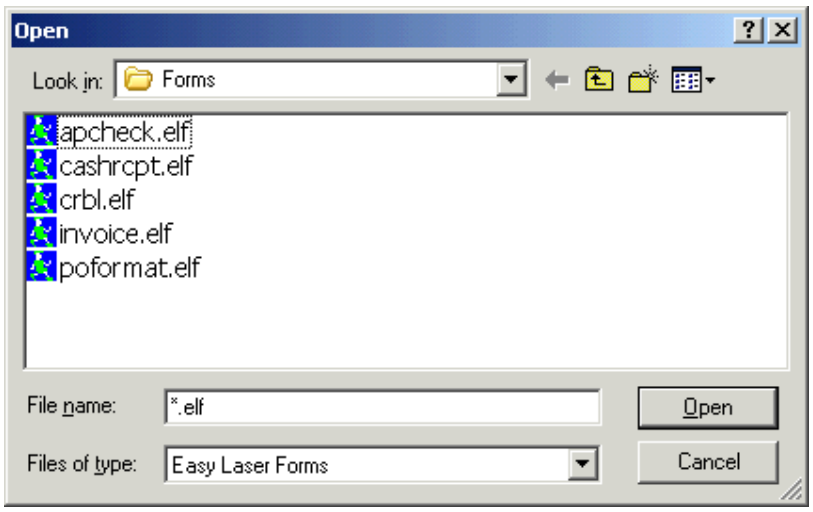


Load ELF form

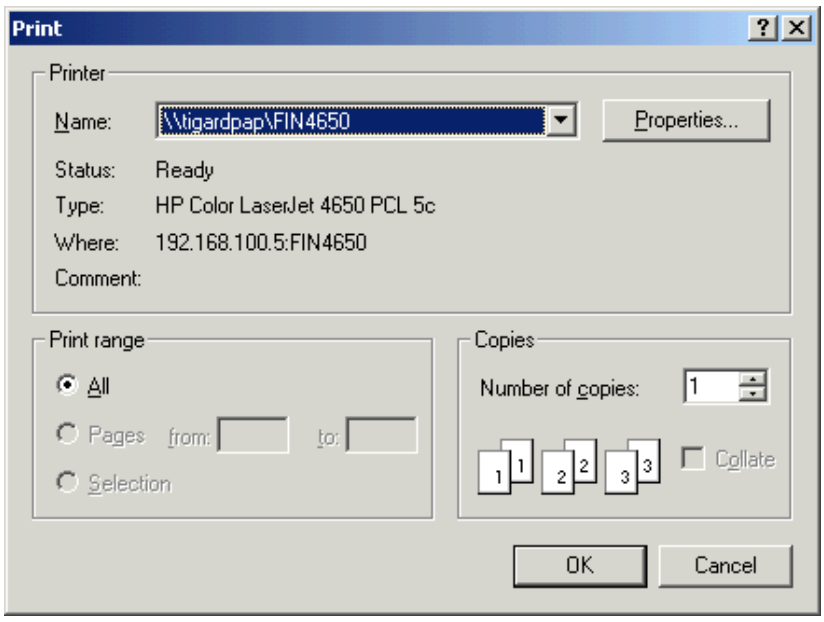
Before you print the PO, enable the ELF form.
Load the Purchase Order ELF Form by clicking on the ELF Icon:



Select the "poformat.elf" then click on the Open:

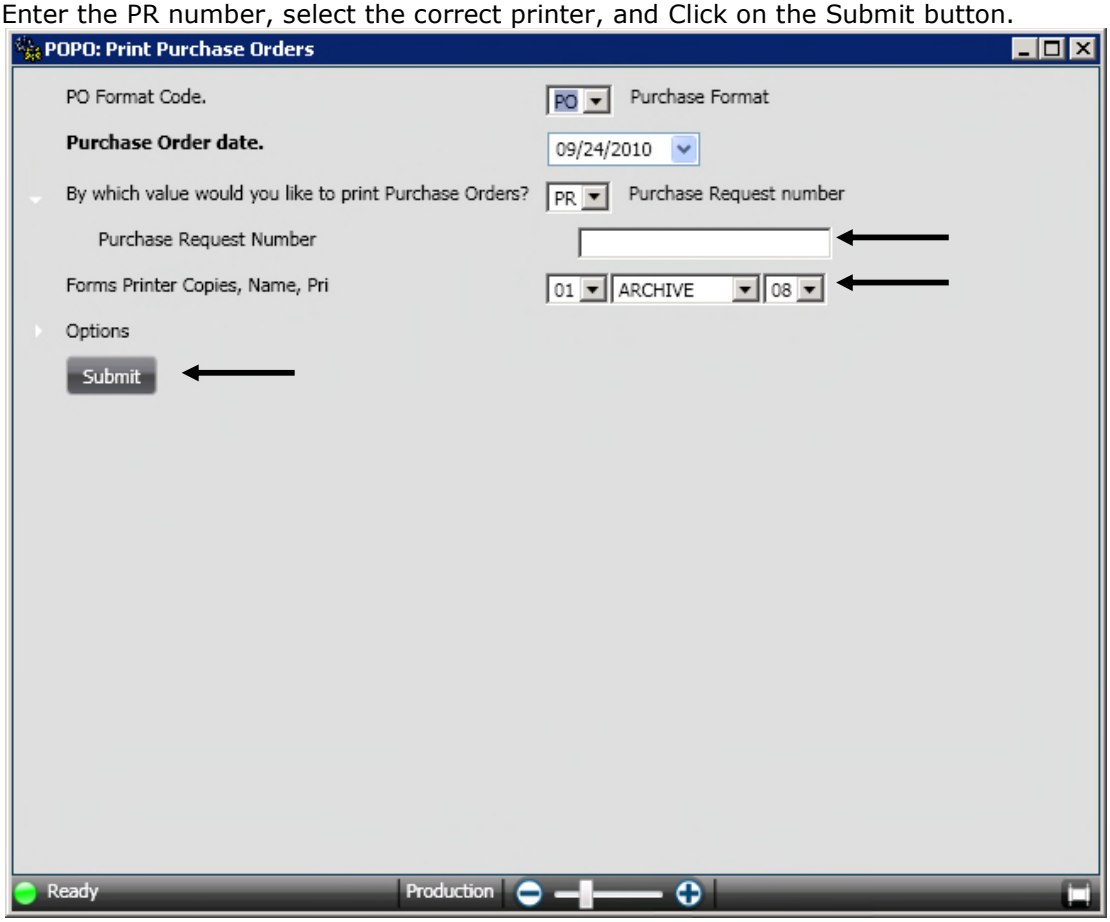


Click on the Add Form and choose the correct printer name then click OK:

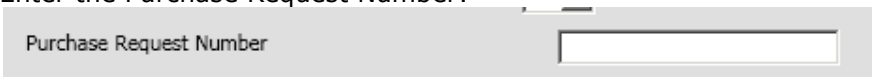


The printer will print a sheet that states "ELF form has been enabled."

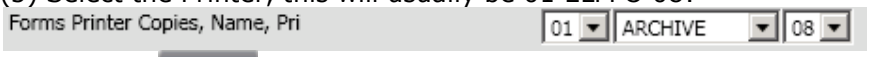
When you are ready to print the actual copy of the PO, bring up the POPO screen. Enter the PR number, select the correct printer, and Click on the Submit button.



(4) Enter the Purchase Request Number:



(5) Select the Printer, this will usually be 01 ELFPO 08:



(6) Click on

Once the POPO job has been submitted:

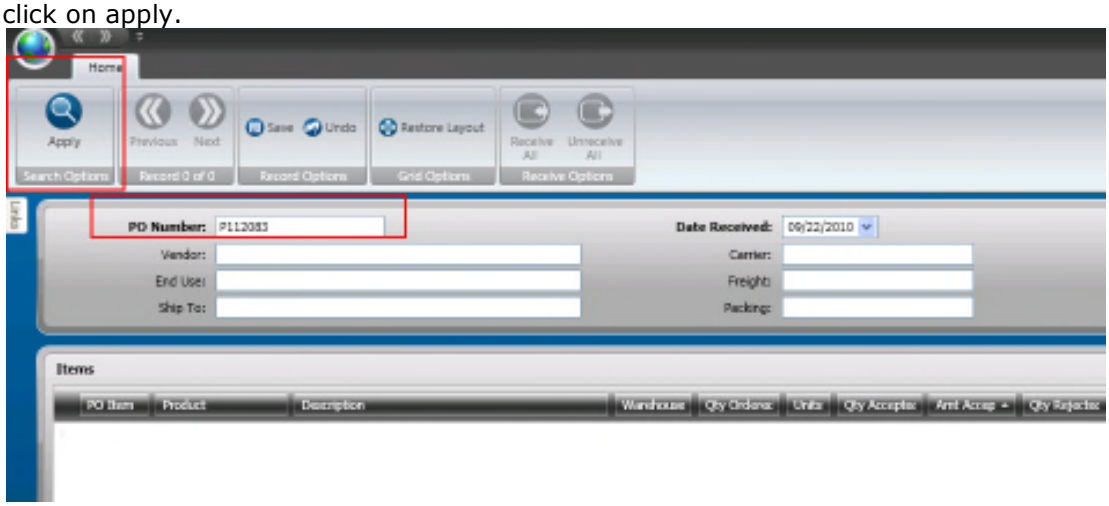
a. A Purchase Order will be printed.
b. The purchase order number will be assigned.
c. The status of the PR will be updated to PO.
d. And the funds will be encumbered.

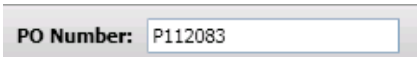
Section 12: Standard Receiving

Standard Receiving Process

- The path to **Receive** is **POUPRC**, you can enter that in the search bar and click the "Enter " button from the key board, then click on Receiving Information (POUPRC):

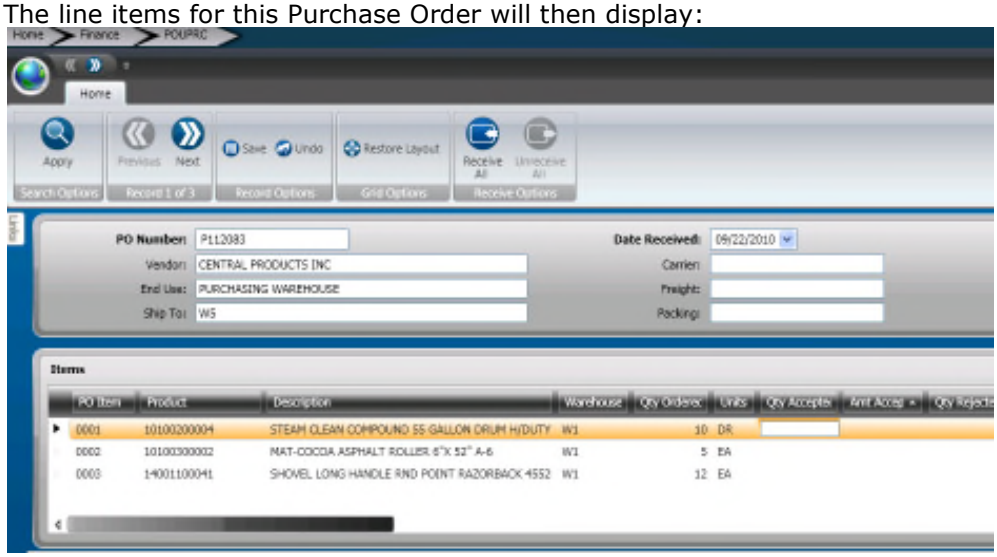
Once the screen is displayed simply enter the PO number in the PO Number field and click on apply.



Enter the PO Number in the 

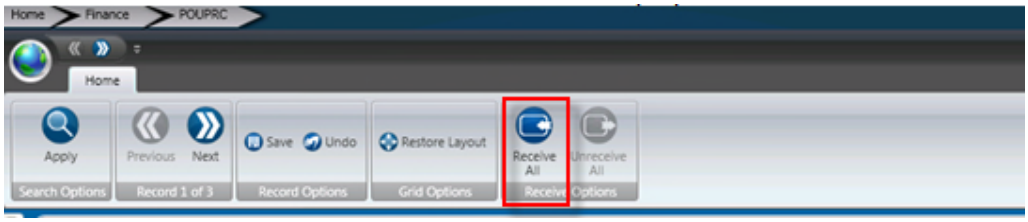
and click on

The line items for this Purchase Order will then display:



Receive all line items

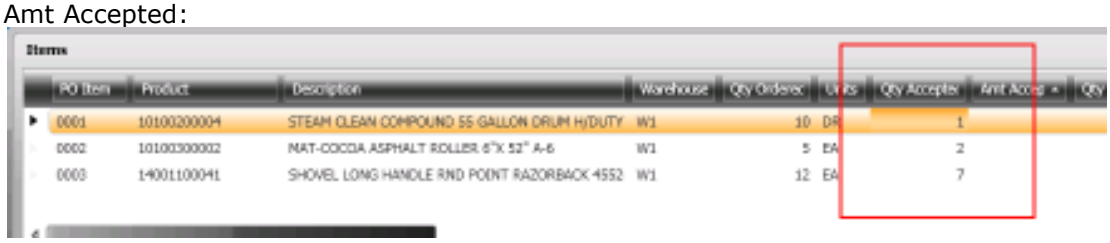
To receive all the line items click the receive all button:



Then click the 'Save' button to update the record.

Receive select line items

To receive only select line items simply enter the quantity received in the Qty Accepted field. If this is a blanket Purchase Order enter in the amount received under Amt Accepted:

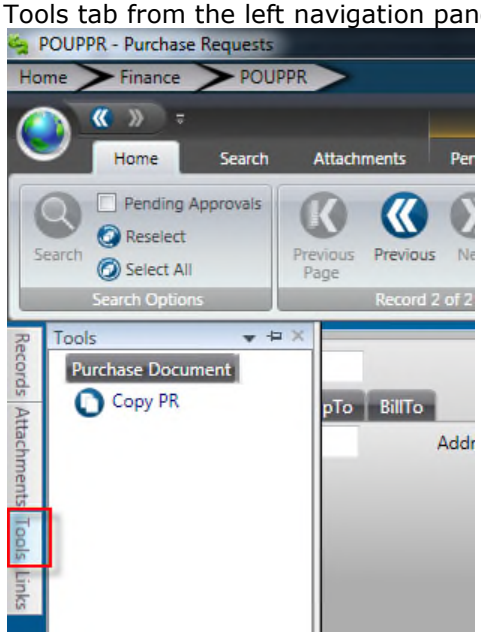


Once the quantity to be received has been entered into the Qty Accepted field it is necessary to click on the 'Save' button to update the record.

(1) Click on

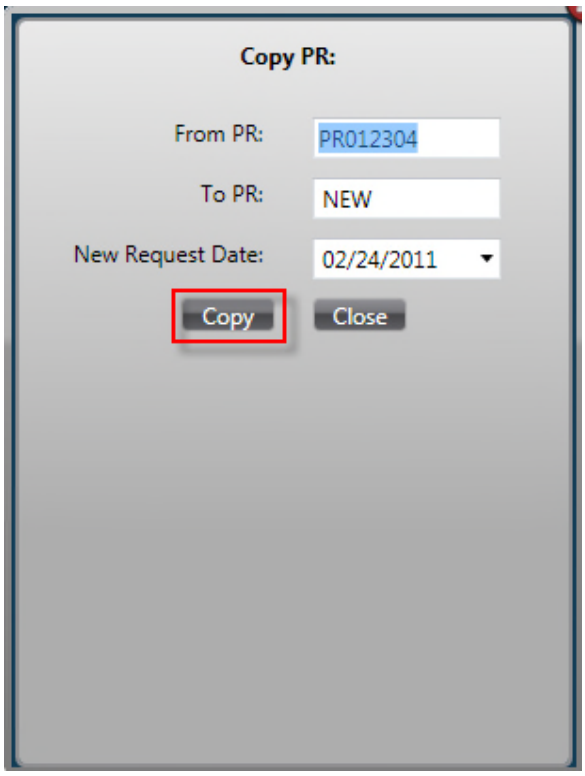
Section 15: Copy a PO

From the POUPPR screen with the PO displayed that needs to be copied, click on the Tools tab from the left navigation panel:

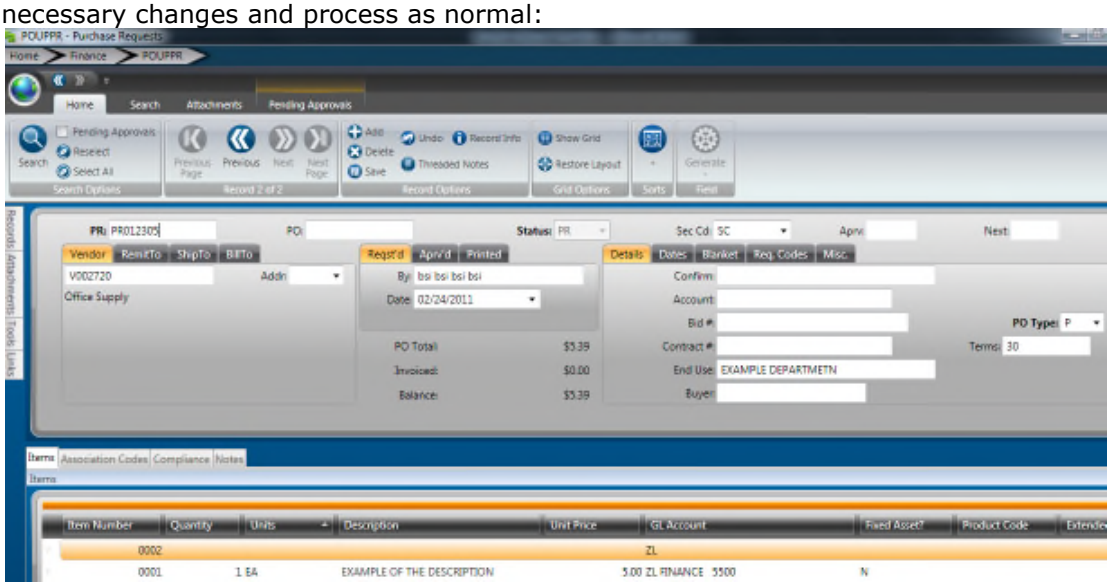


Next click on the Copy PR link:

The copy window will display. Hit the Copy button to generate a new PR with a system generated number.



The system will display the new PR, saving the user data entry time. Make the necessary changes and process as normal:



Section 16: Disencumber Purchase Order - POMADE

Cancel/Disencumber Purchase Order Process-POMADE

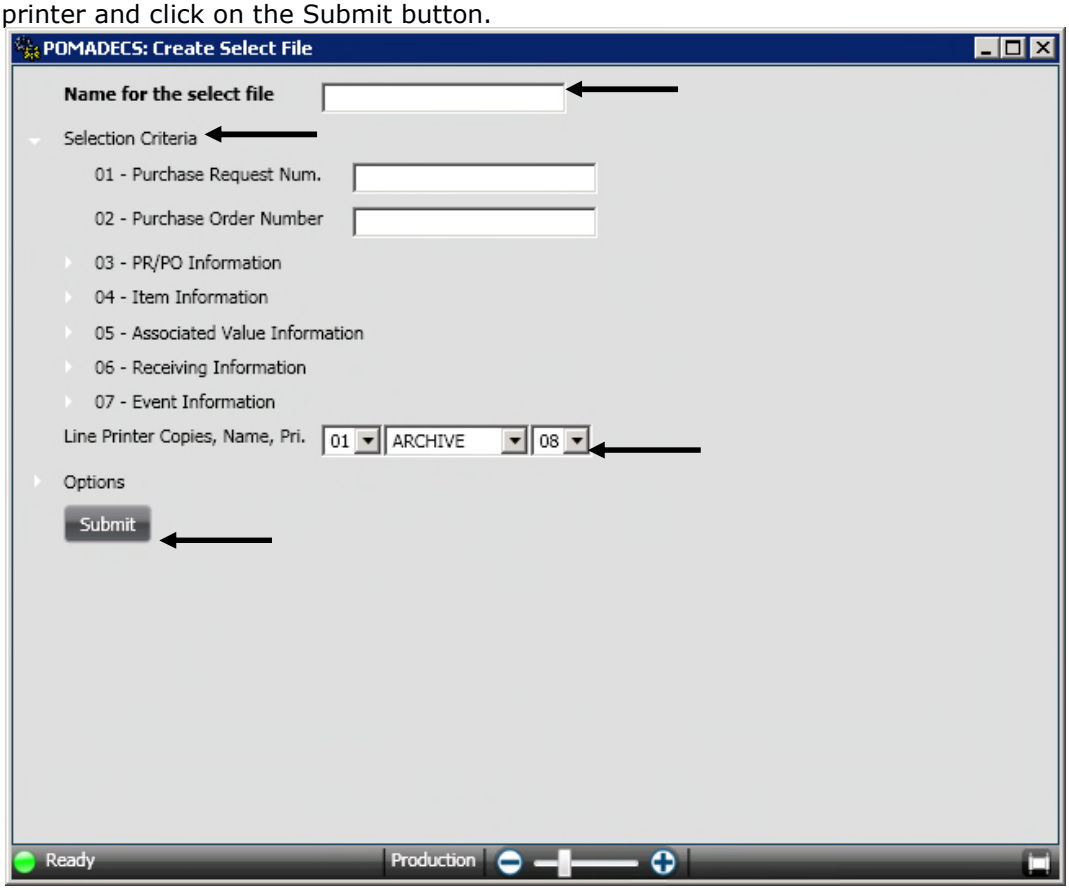
POMADE steps:

(1) POMADECS- Create Select File
(2) POMADEUS- Update Select File

- The path to **Create the Select File** is **POMADECS**, you can enter that in the search bar, click the "Enter " button from the key board, and then click on Create Select File (POMADECS):

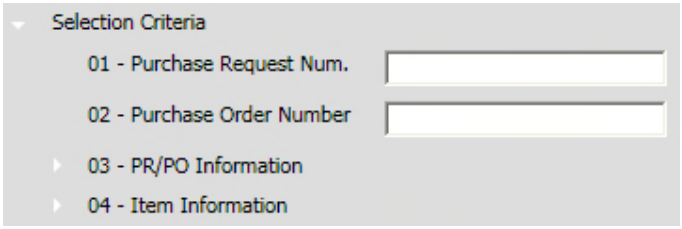
(1) POMADECS – Create Select File

Once the POMADECS window opens, you will need to create a name for the select file. Use the Selection Criteria for the criteria that will be used to cancel the Purchase Order (on most occasions it will be the Purchase Order Number). Select the line printer and click on the Submit button.

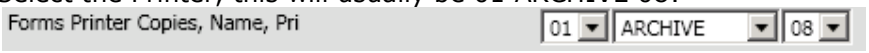


Enter the Name of the Select File:

Use the Selection Criteria:

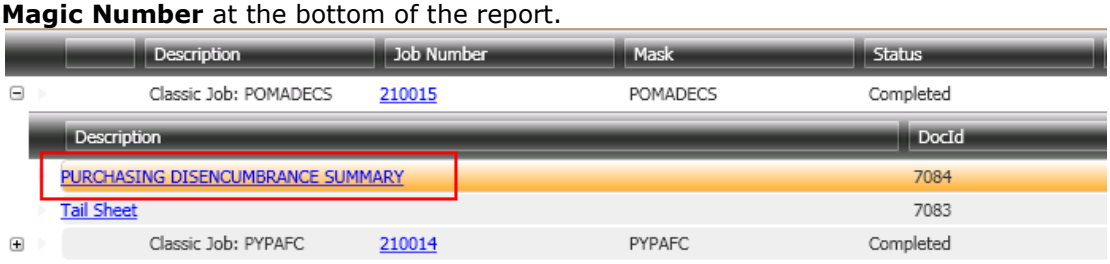


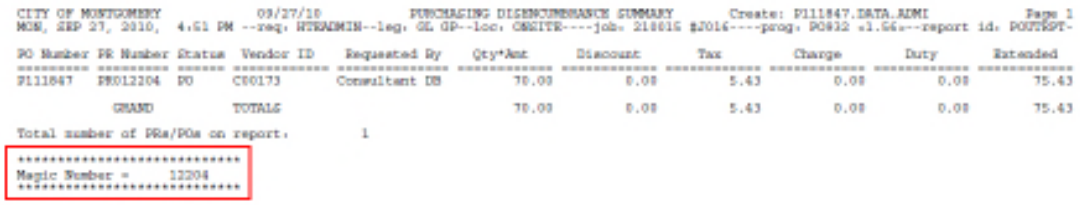
Select the Printer, this will usually be 01 ARCHIVE 08:



Click on

A Purchasing Disencumbrance Summary Report will then be created. Look over the report to make sure the correct information has been selected. Then write down the **Magic Number** at the bottom of the report.

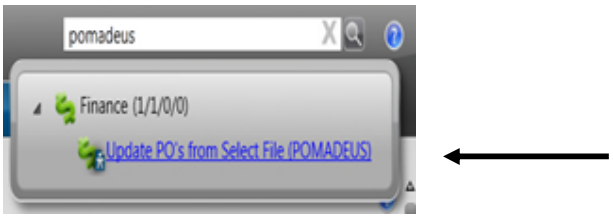




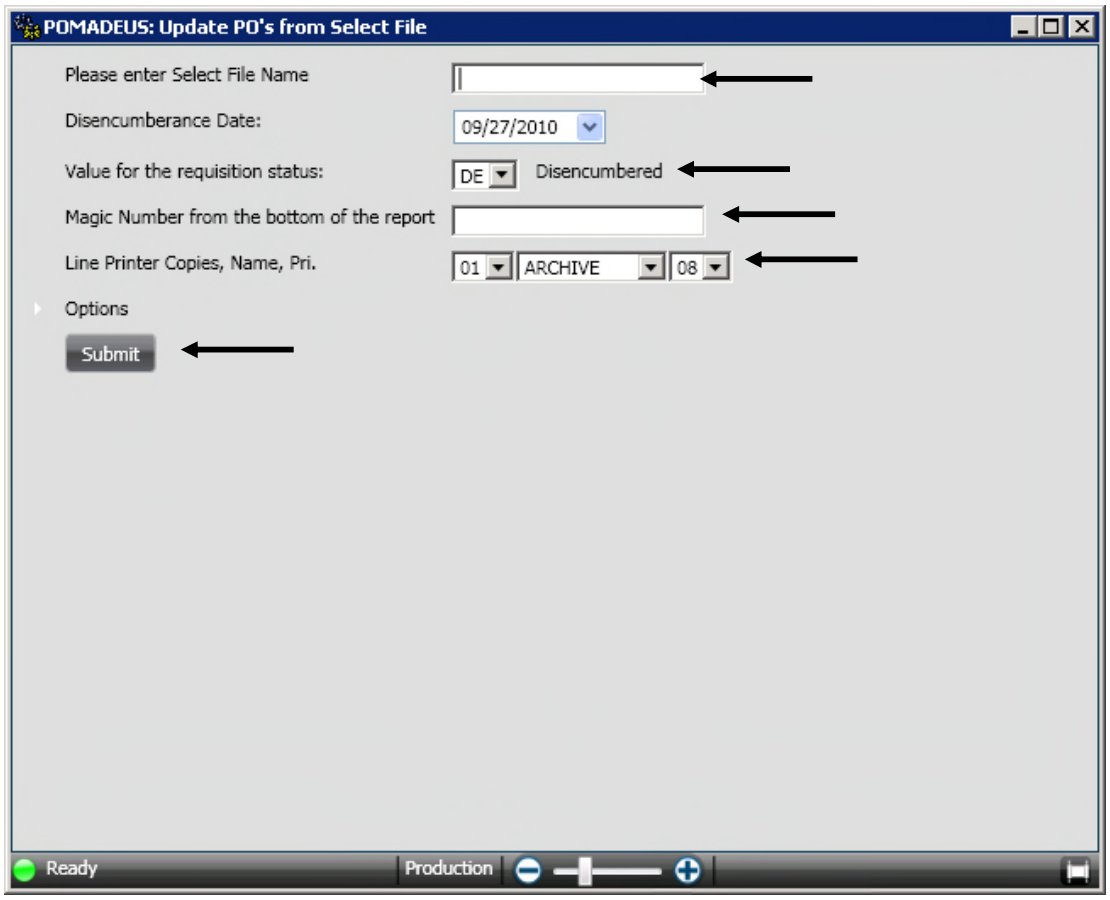
(2) POMADEUS – Update Select File

Now run POMADEUS to actually cancel/disencumber the Purchase Order.

The path to **Update the Select File** is **POMADEUS**, you can enter that in the search bar. After you have done so, click the "Enter " button from the key board and then click Update Select PO's from Select File (POMADEUS):



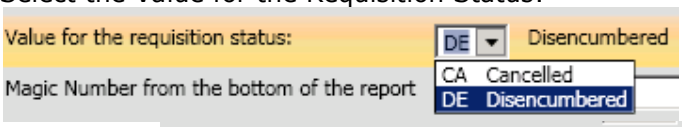
Enter the select file name. Select the value for the requisition status DE-Disencumbered or CA-Canceled (they disencumber the funds). Enter in the Magic Number, select the line printer, and click on the Submit button.



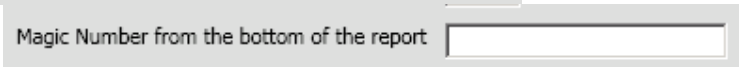
(1) Enter the Name of the Select File in the

field

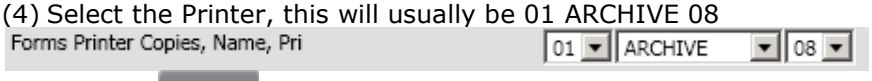
(2) Select the Value for the Requisition Status:



(3) Enter in the

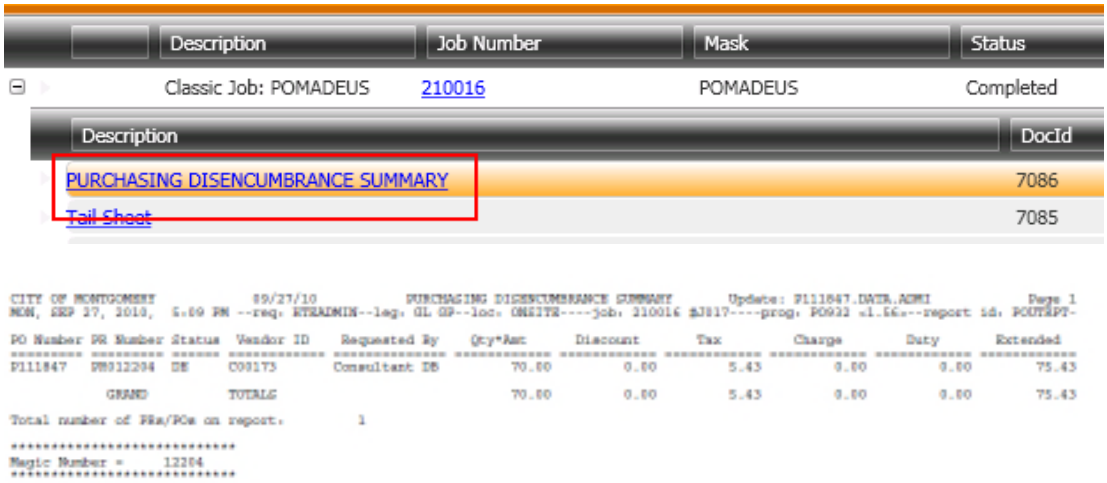


(4) Select the Printer, this will usually be 01 ARCHIVE 08

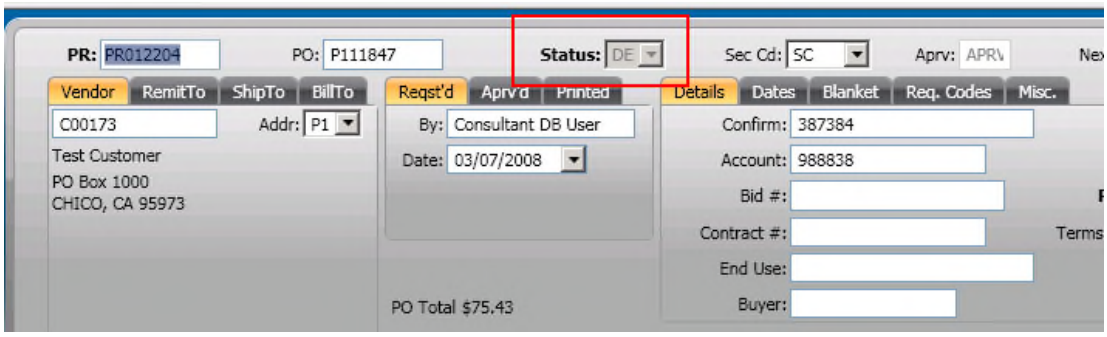


(5) Click on

A Purchasing Disencumbrance Summary Report will then be created. Look over the report to make sure the correct Purchase Order(s) have been cancelled or disencumbered.



The Purchase Order status has been updated to DE/CA and the funds have disencumbered:



Section 17: Close/Cancel Purchase Order – POUTCL

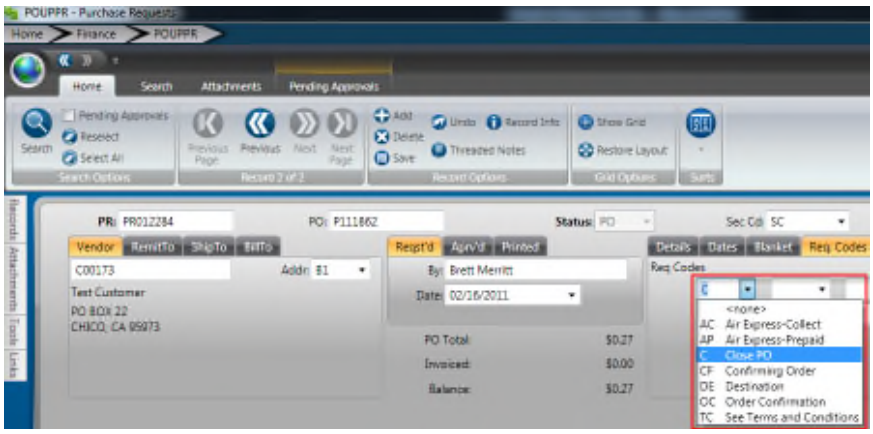
Cancel/Disencumber Purchase Order Process-POUTCL

POUTCL steps:

1. POUPPR-req code of C
2. POUTCL-run utility to close/cancel purchase order

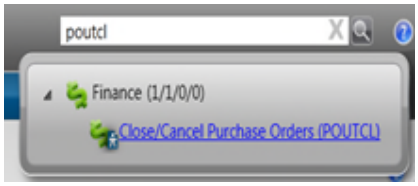
Req code C-Close PO

Open the POUPPR screen and save the req code of C-Close PO on the PO that needs to be closed/cancelled:

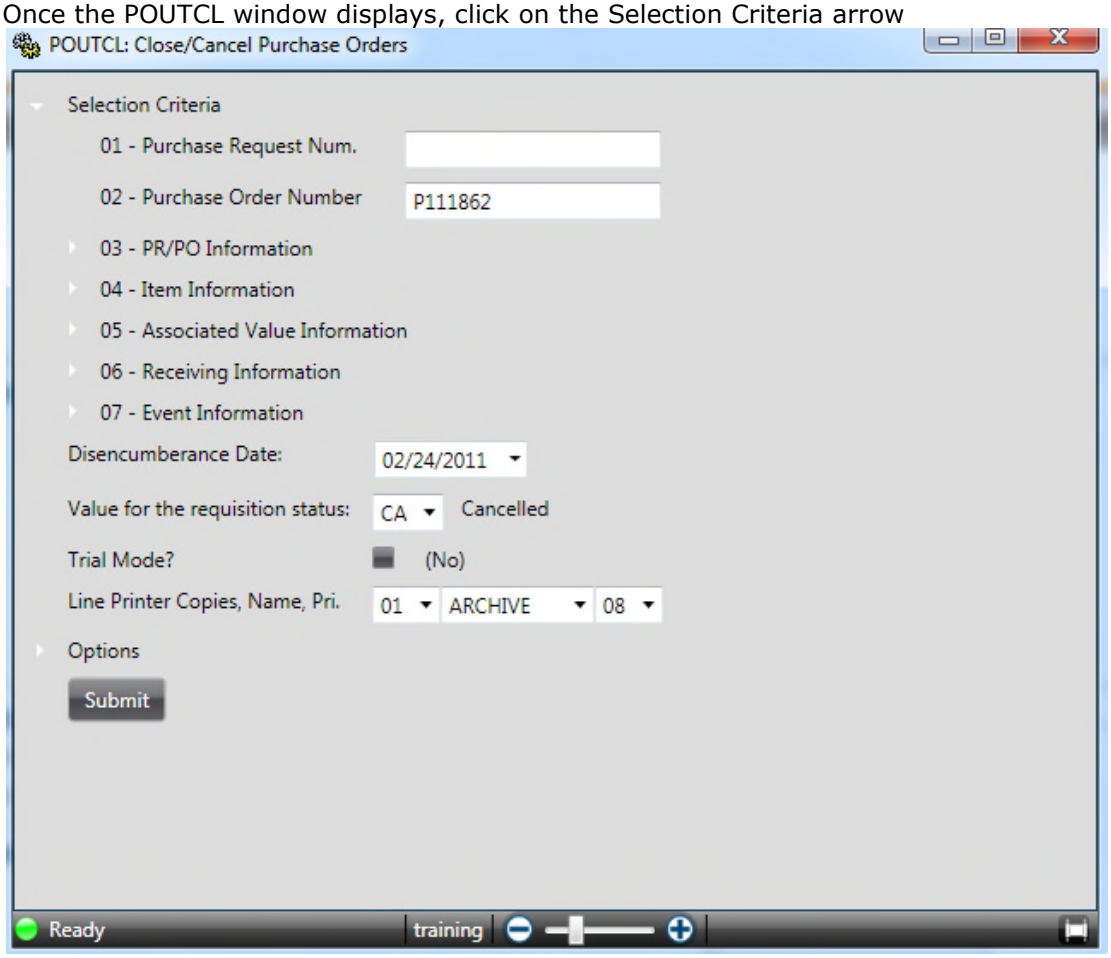


POUTCL-close/cancel PO:

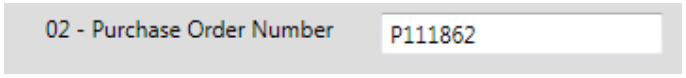
- The path to **Close/Cancel Purchase Orders** is **POUTCL**, you can enter that in the search bar, click the "Enter " button from the key board and then click Close/Cancel Purchase Orders (POUTCL):



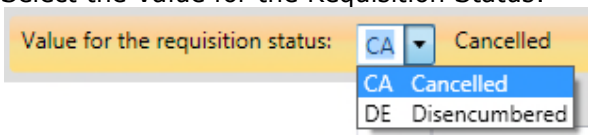
Once the POUTCL window displays, click on the Selection Criteria arrow



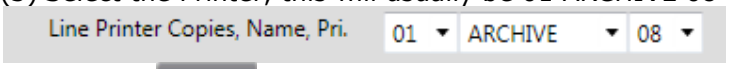
(1) Enter the PO number in:



(2) Select the Value for the Requisition Status:

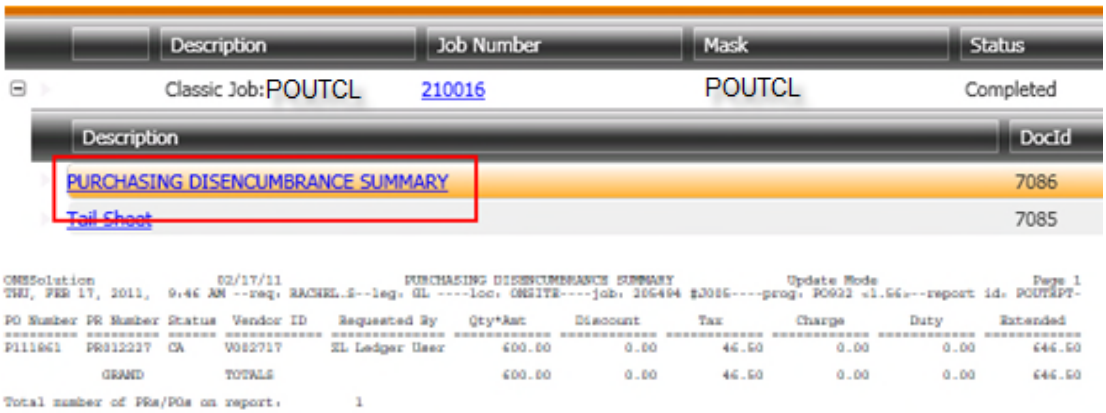


(3) Select the Printer, this will usually be 01 ARCHIVE 08

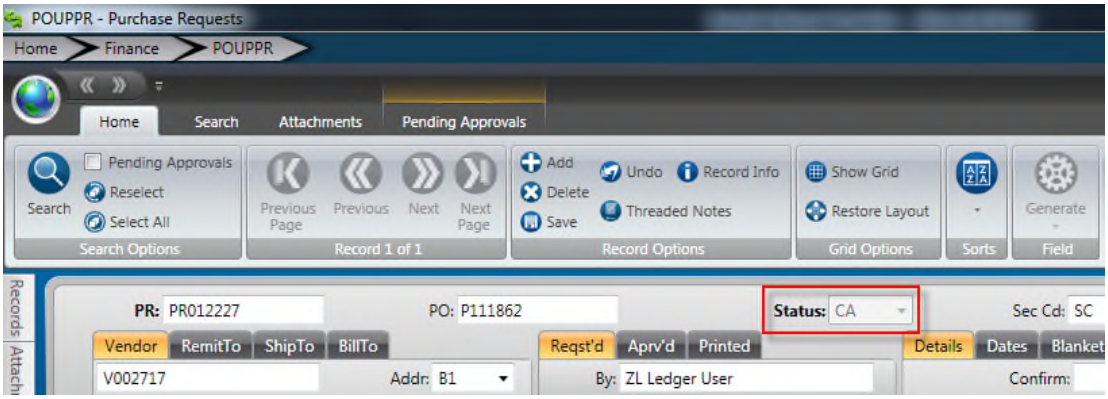


(4) Click on

A Purchasing Disencumbrance Summary Report will then be created. Look over the report to make sure the correct Purchase Order(s) have been cancelled or disencumbered.



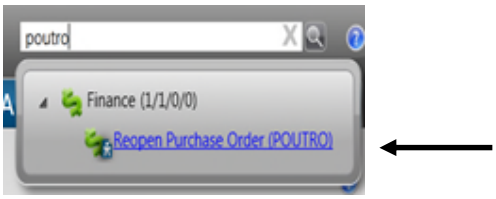
The Purchase Order status has been updated to DE/CA and the funds have disencumbered:



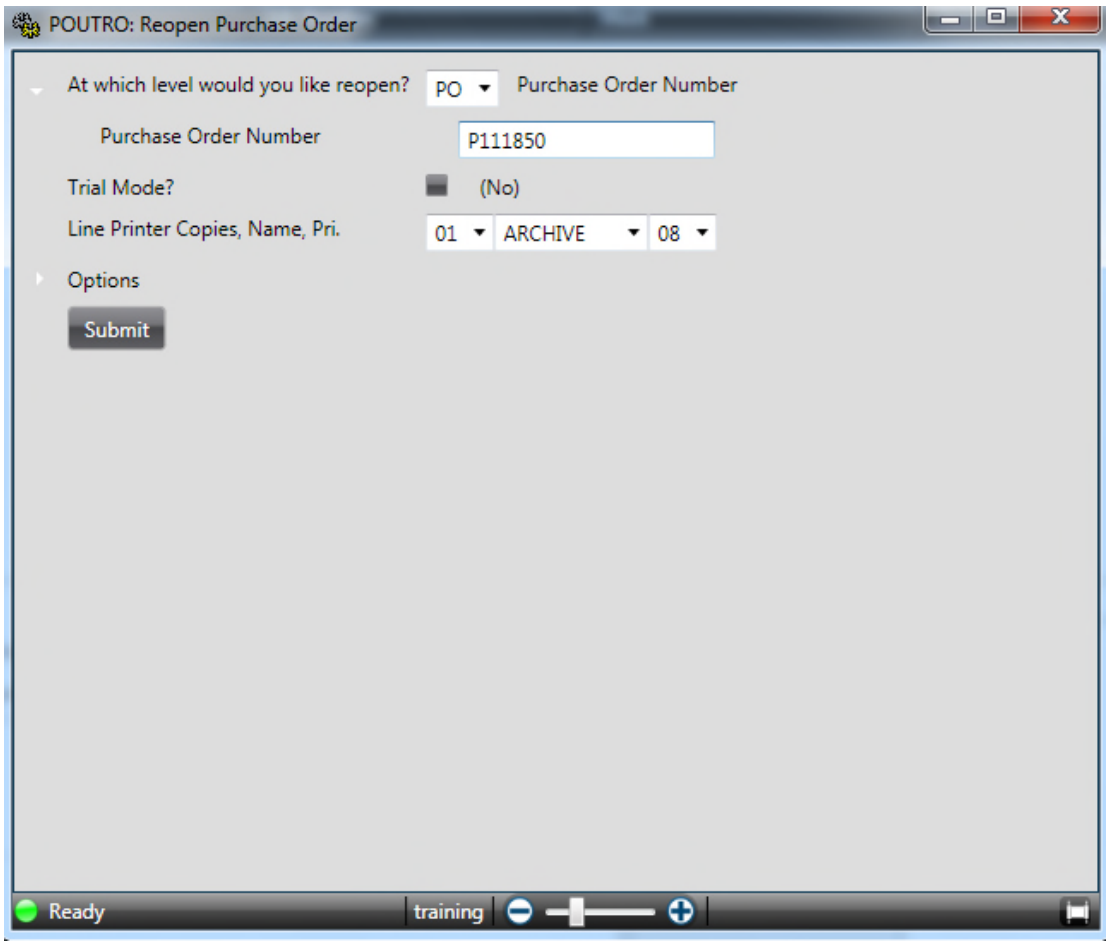
Section 18: Reopen Purchase Order

Reopen Purchase Order-POUTRO

- The path to **Reopen a PO** is **POUTRO**, you can enter that in the search bar, click the "Enter " button from the key board and then click Reopen Purchase Order (POUTRO):

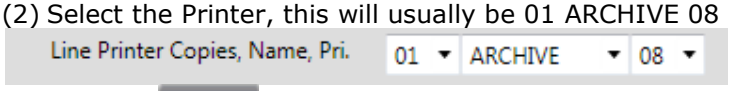


The POUTRO window will then display:



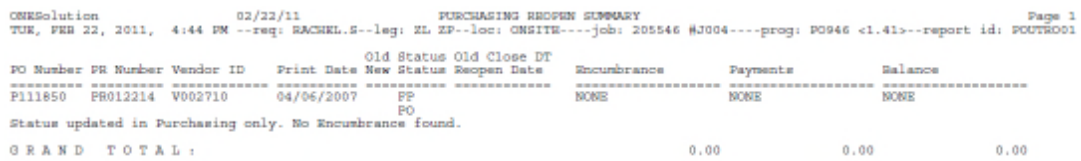
(1) Enter the PO number in:

(2) Select the Printer, this will usually be 01 ARCHIVE 08



(3) Click on

A Purchasing Reopen Summary Report will then be created. Look over the report to make sure the correct Purchase Order(s) have been reopened.



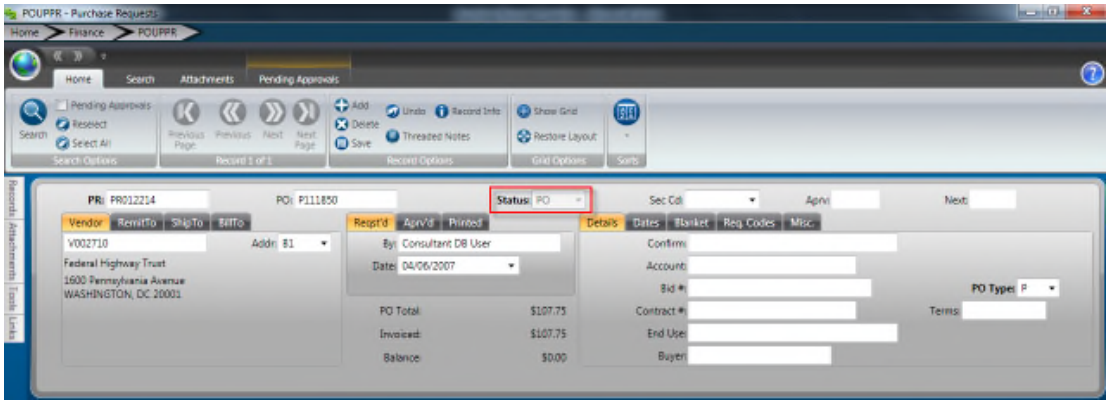
ONESolution 02/22/11 PURCHASING REOPEN SUMMARY Page 1
TUE, FEB 22, 2011, 4:44 PM --req: RACHEL.S--leg: ZL ZP--loc: ONSITE----job: 205546 HJ004----prog: PO946 <1.41>--report id: POUTRO01

PO Number	PR Number	Vendor ID	Print Date	Old Status New Status	Old Close DT Reopen Date	Encumbrance	Payments	Balance
P111850	PR012214	V002710	04/06/2007	FP PO		NONE	NONE	NONE

Status updated in Purchasing only. No Encumbrance found.

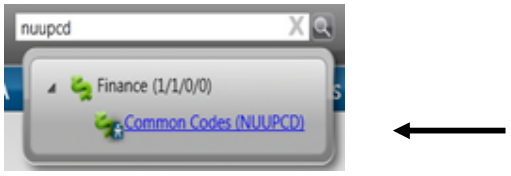
GRAND TOTAL: 0.00 0.00 0.00

The Purchase Order status has been updated to PO allowing the user to make necessary changes:

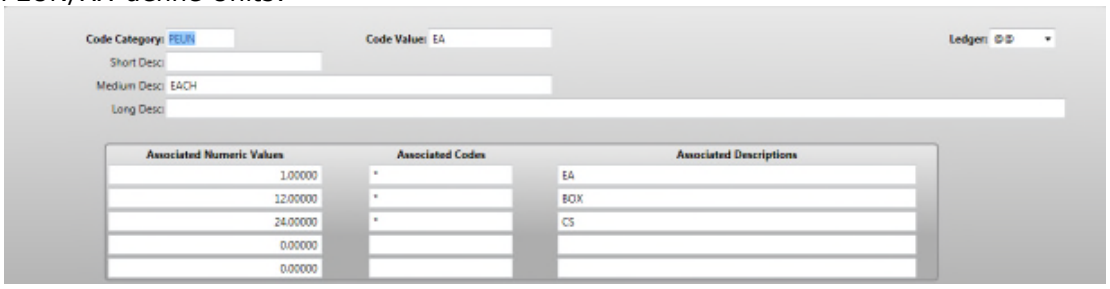


Section 20: Common Codes-NUUPCD

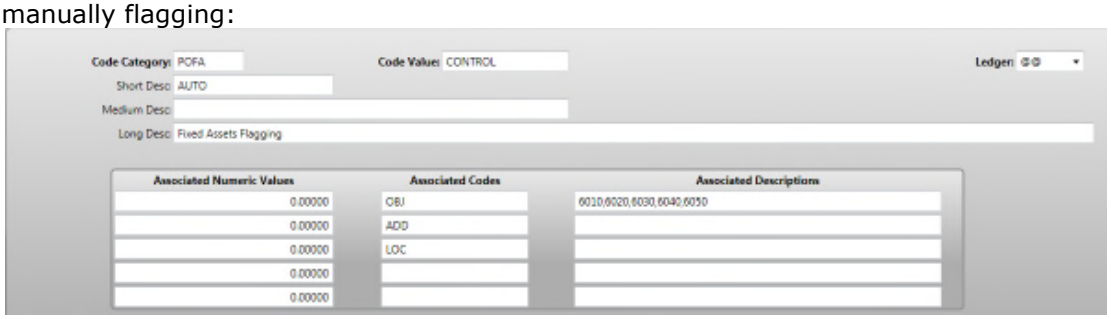
- The path to **Common Codes** is **NUUPCD**, you can enter that in the search bar, click the "Enter " button from the keyboard and then click Common Codes (NUUPCD):



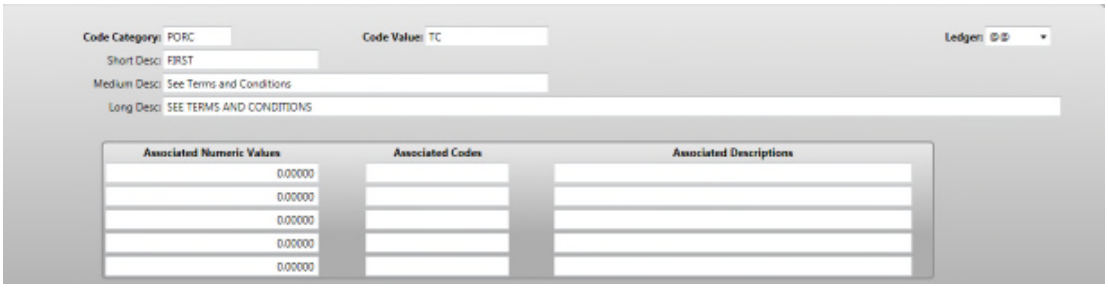
PEUN/XX-define Units:



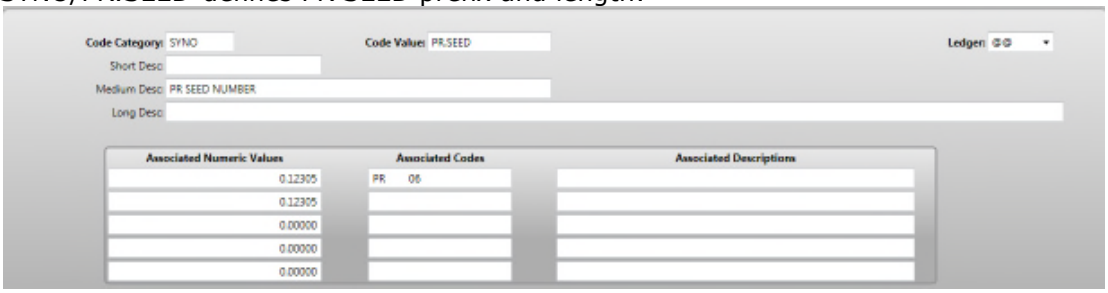
POFA/CONTROL-flagging FA automatically, change short description to 'MAN' for manually flagging:



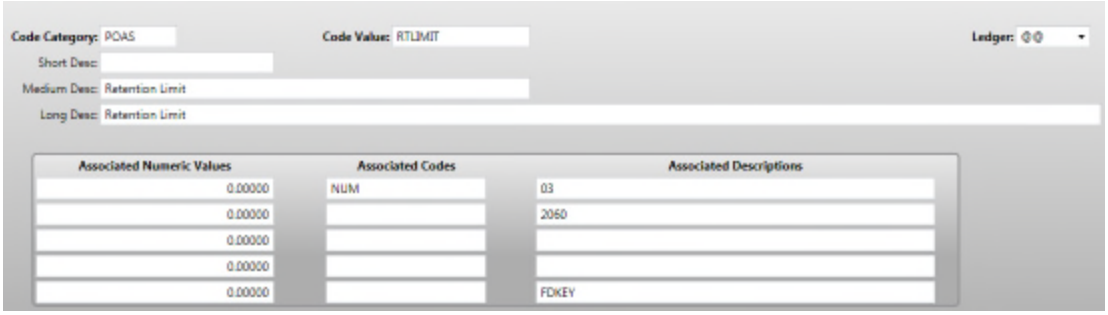
PORC/XX-define req codes-short description first= before line items, last= after line items, leave blank to not print on PO:



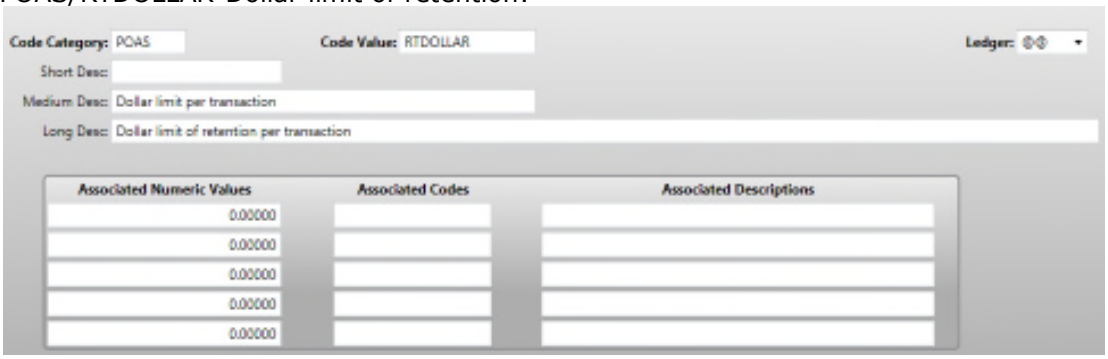
SYNO/PR.SEED-defines PR SEED prefix and length:



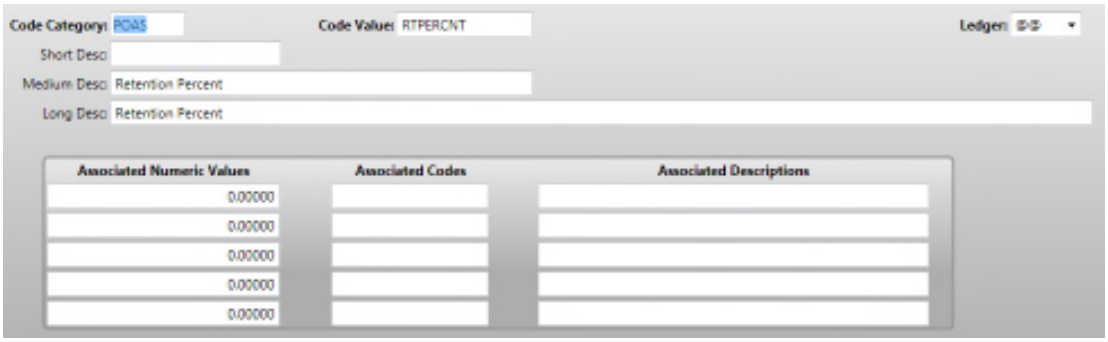
POAS/RTLIMIT-Retention limit:



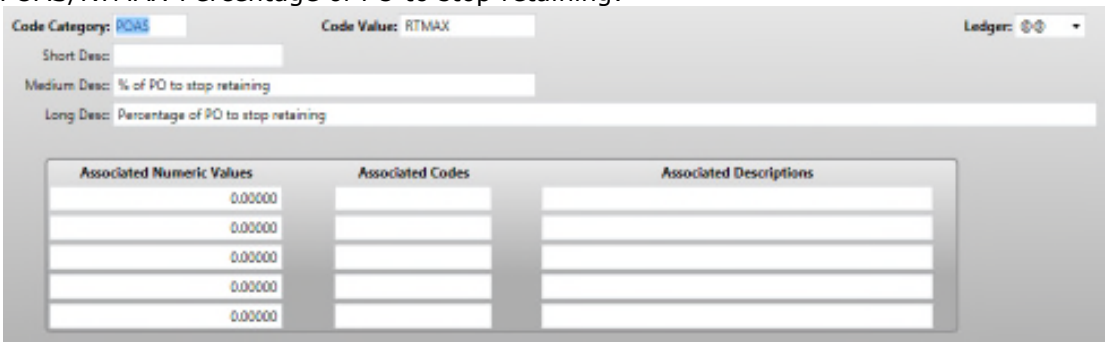
POAS/RTDOLLAR-Dollar limit of retention:



POAS/RTPERCNT-Retention percent:



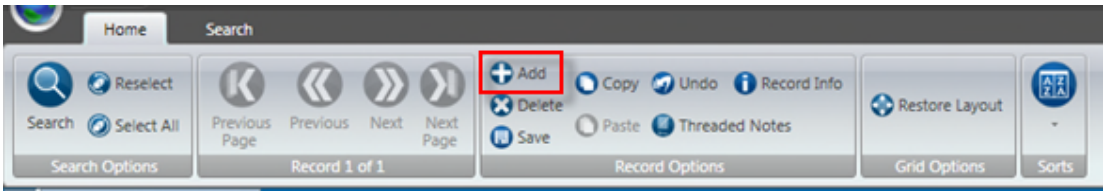
POAS/RTMAX-Percentage of PO to stop retaining:



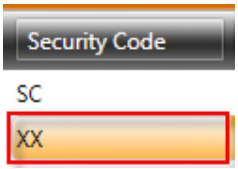
Section 21: Security Codes-POUPSC

To set/define the **PO Security Codes**, type **POUPSC** in the search bar, click the "Enter " button from the key board, and then click Security Codes Purchasing (POUPSC):

To add a new security code click the add icon on the ribbon bar:



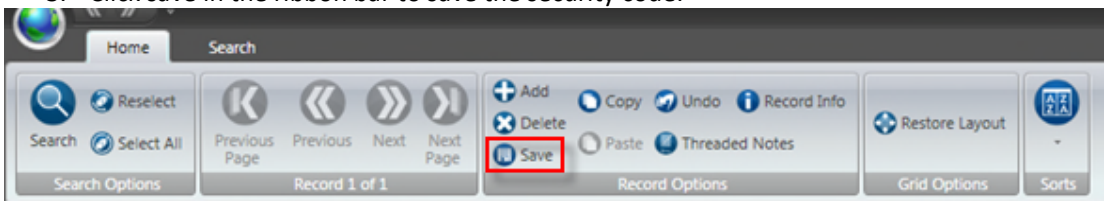
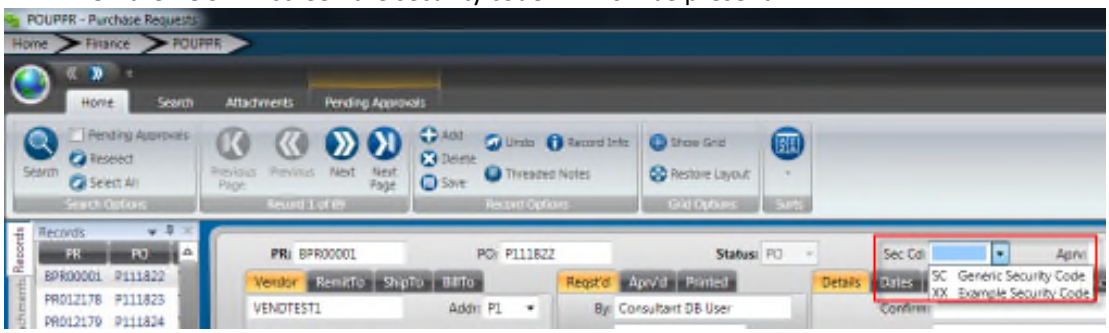
1. Enter the two digit security code in the security code field:



2. Enter a description of the security code:

Security Code	Description
SC	Generic Security Code
XX	Example Security Code

3. Click save in the ribbon bar to save the security code:



4. On the POUPPR screen the security code will now be present: