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About this guide

Target Audience	Purchase Req Assigned by the raise purchase the purchasin	uestor he Depari e request g policy a	tment manager s according to and guidelines.	How to use the guide)	 This guide providused as a job aid to: Log in to Tech Navigate the screens/task Follow the Raise Receipt a deliver detailed steps to requestor role 	des a ge to perf hOne Purcha s a Purch y refere perforr	neral overview, to be orm tasks required se Requestor main ase Request and ence guides for n key purchase
Busin	ess Rule	·̈̈́Ų- ^{Τi} in	p - More key formation	\oslash	Sto reo	op – Complete quired steps	目	Step ahead to another section

Business Process

The standard purchasing process flows through a series of steps as summarised below.





Key information before you start

TechOne	Access TechOne via the		Purchase	Responsible for:
	desktop icon or using web location racgp.t1cloud.com	T1_Cloud	Requestor Role	 Raising a purchase request Receipting goods and services Amendments or cancellations to orders

Access Technology One

Log in to TechOne	1. Click on the TechOne icon - ݣِ- Single sign on will automatically recognise log in details
Log into Core Enterprise Suite	2. From the Dashboard, select Core Enterprise Suite Image: Construction of the Could Image: Construction of the Could Image: Construction of the Could Image: Construction of the Could Image: Construction of the Could Image: Construction of the Could Image: Construction of the Could Image: Construction of the Could o
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Navigating the Purchasing Task Screens

The Common Tasks dashboard displays a number of icons (numbered in the image below), performed regularly. The key icons are:

- 1. Create a Purchase Requisition
- 2. Amend, Receive or Cancel Purchase Orders
 - a. Amend the order to add or remove goods and services, adjust costs or quantities
 - b. Receive and record the goods and services received matched to the order
 - c. Cancel the purchase order
- 3. Maintain Purchase Requisitions
 - a. Retrieve an existing purchase requisition for edit prior to approval

These are tasks a Purchasing Officer n	nay be required to perform regularly.		
Create a Purchase Requisition	Maintain Purchase Requisitions	Enquire on Purchase Requisitions	Release and Print Purchase Orders
2 Amend, Receive or Cancel Purchase Orders	Enquire on Orders	Re-Print Purchase Orders	Re-Print Requisitions
Review and Process	Purchasing Status Report	Run Reports	XLOne Reporting



View & Navigate Purchase Requisition Screen

Select Task			
	1. Click icon Create a Purchase F	Requisition	
	Create a Purchase		
	Requisition		
View Side	Actions available display on the si	ide bar. By making a selection, further actions will display	
Bar	Tasks Perform My Requisitions Enquire	Reports My Workflow	
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	New Requisition A PU		
	Select from the following templates to create a new requisition:	quisition Header	
	III Blank AP Supplier Req Sup	pplier Code:	
	Sup	pplier Account:	
	Sup	pplier Name:	
	Con	mments:	
	1 Select Blank AP Sunnlier Reg	or Main/Blanket Order template depending the type of	
	purchase requisition you are o	creating.	
	A black purchase requisition serve	on will display for ontry	
	A blank purchase requisition scree	en will display for entry.	
Use Side	A new set of side bar actions will of	display for selection, explained as follows:	
Bar			
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P2P LOG IN AND NAVIGATION FOR PURCHASE REQUESTORS



View Main Screen	 The main screen for creating purchase requisition includes: Requisition Header; Supplier, your department/location code, any contract values Requisition Lines; Specific goods and services requested including quantity, cost, account number (cost centre, project and expense code)
	2 Additional entry details: Supplementary information
	Purchase Requisition Location: MAIN Q Requisition Nbr: NewReqn Q
	Requisition Header
	Supplier Account.* AP Image: Comments: Sub Location:* 06 Image: Comments: Default Due Date:* Image: Comments: Apply to Lines
	Contract Reference:
	Delivery Terms (line1):
	(line2):
	Contract Value \$: 0 \$
	Requisition Lines
	Line Id Line Type* Identifier Nbr Description Classificati Servic GST Order Unit Name Order Qty Order Unit Amt Ex Order Amt Ex Ant
	0.00 00.00
	Default Accounts from previous line
	Line Detail
	Additional Line Text and Comments
	Supplier Address
	Attachments
	$\dot{\dot{Q}}$ Some sections of the screen may display as collapsed. Use the expand icon $$ to view the sections in more detail.
Use Navigation Pane	A set of quick actions are available at the top of the main screen to return to the Tasks screen, go back a step, close or clear details entered. Tasks I Perform My Requisitions Enquire Reports My Workflow
	Entry 🕜 help 🗲 back 🔹 🏠 home 📑 close 🧷 clear 🖆 retrieve



View & Navigate Amend, Cancel or Receive Purchase Order Screen

The main functions of this task allow purchase orders to be amended, receipted or cancelled. This applies to all purchase requisitions approved and sent to the supplier as a purchase order.

Select Task	1. Click icon Amend, Receive or Cancel Purchase Orders
	Amend, Receive or Cancel Purchase Orders
View Key Actions	Actions available display on the side bar to perform the main functions to either receive, amend or cancel an order. Tasks I Perform My Requisitions Enquire Reports My Workflow List ? help back < ^ home Close Close Fetrieve
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View & Navigate Maintain Purchase Requisitions

The main function of this task is to adjust saved purchase requests that are yet to be approved.

Select Task	1. Click icon Maintain Purchase Requisitions Maintain Purchase Requisitions
View Key Actions	Purchase Requisitions Select a Purchase Requisition to work on
	Requisition Number Requisition Date Supplier Name Reference Number Sub Location PO500000 3 2019 INVOICE 45 06 1. Search fields to locate purchase requisition 2. Retrieve a purchase requisition 3. Click on requisition number to adjust the fields for entry on the main screen

Further Support

- Follow the reference guides to complete the process:
 - o Raise a Purchase Request
 - Receipt a Purchase Order
- For any issues/errors please log a support ticket through ServiceHub