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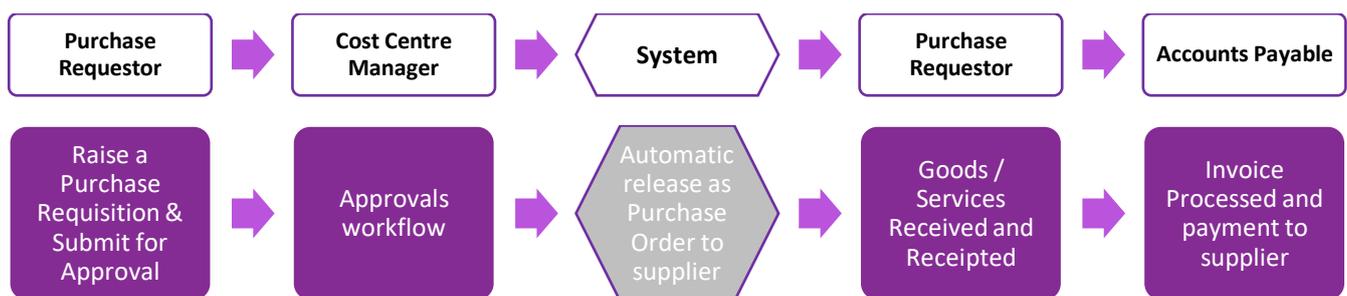
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About this guide

Target Audience	Purchase Requestor Assigned by the Department manager raise purchase requests according to the purchasing policy and guidelines.	How to use the guide	This guide provides a general overview, to be used as a job aid to perform tasks required to: <ul style="list-style-type: none"> • Log in to TechOne • Navigate the Purchase Requestor main screens/tasks <p>Follow the Raise a Purchase Request and Receipt a delivery reference guides for detailed steps to perform key purchase requestor role</p>
 Business Rule	 Tip - More key information	 Stop – Complete required steps	 Step ahead to another section

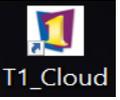
Business Process

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

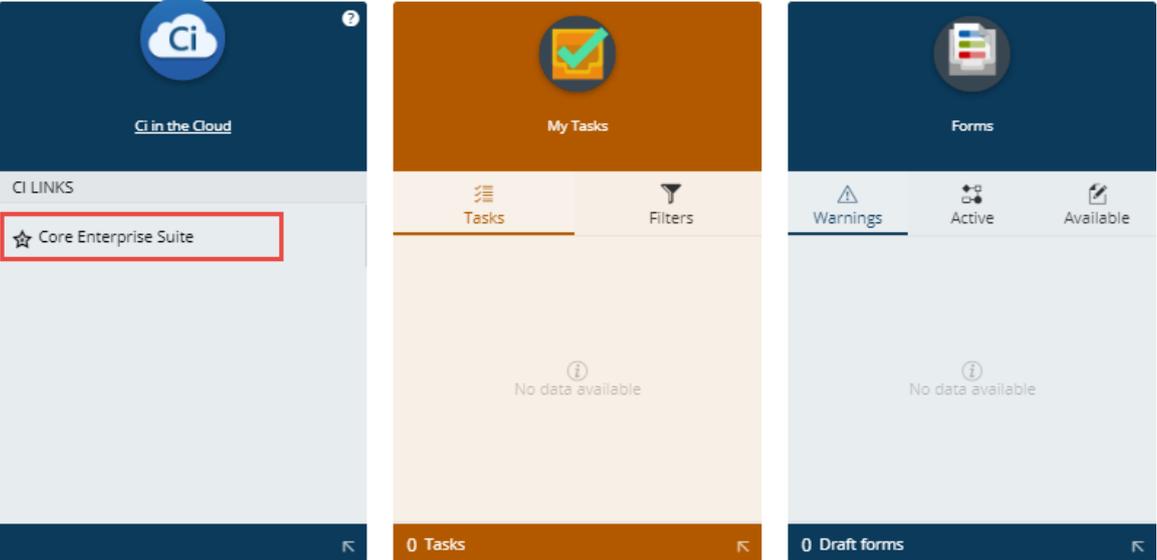
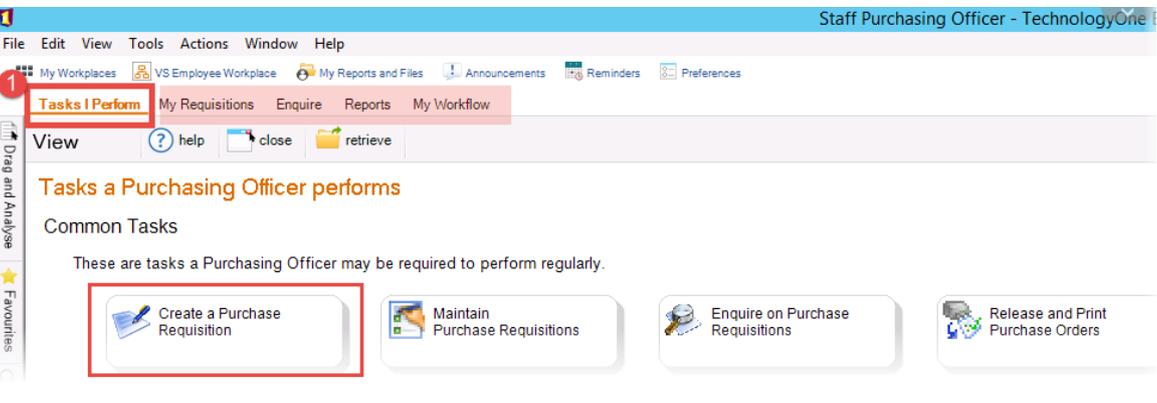




Key information before you start

<p>TechOne</p>	<p>Access TechOne via the desktop icon or using web location racgp.t1cloud.com</p>		<p>Purchase Requestor Role</p>	<p>Responsible for:</p> <ul style="list-style-type: none"> • Raising a purchase request • Receiving goods and services • Amendments or cancellations to orders
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Access Technology One

<p>Log in to TechOne</p>	<p>1. Click on the TechOne icon</p>  <p><i>Single sign on will automatically recognise log in details</i></p>
<p>Log into Core Enterprise Suite</p>	<p>2. From the Dashboard, select Core Enterprise Suite</p>  <p>The Purchasing Requestor role will provide a new screen defaulted to the 'Tasks I Perform'</p>
<p>View Purchasing Officer Tasks</p>	



Navigating the Purchasing Task Screens

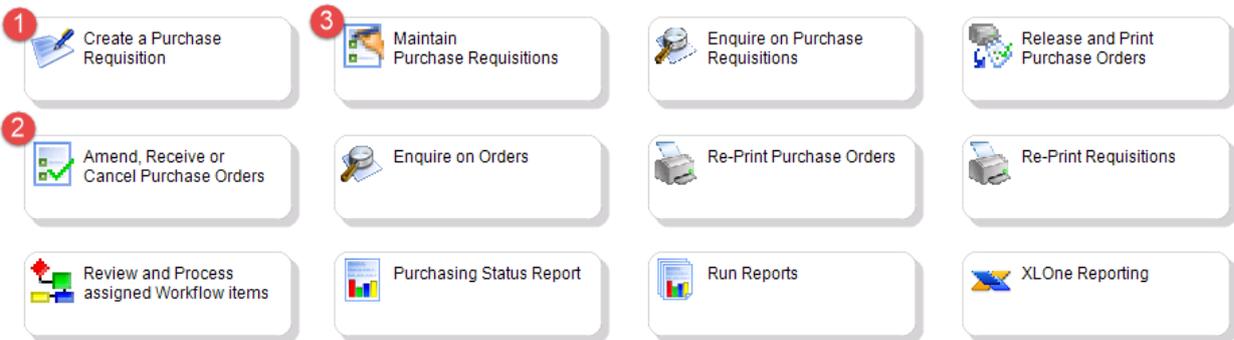
The Common Tasks dashboard displays a number of icons (numbered in the image below), performed regularly. The key icons are:

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

Tasks a Purchasing Officer performs

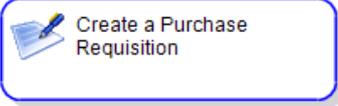
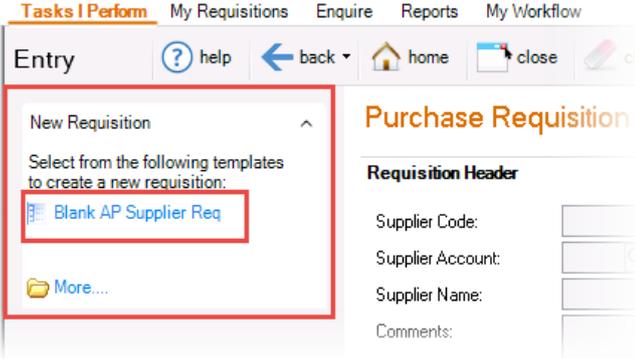
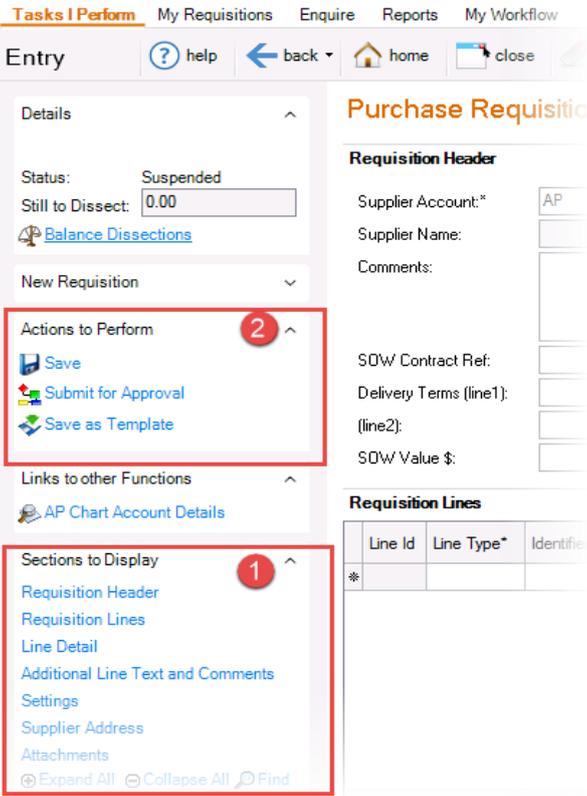
Common Tasks

These are tasks a Purchasing Officer may be required to perform regularly.





View & Navigate Purchase Requisition Screen

<p>Select Task</p>	<p>1. Click icon Create a Purchase Requisition</p> 
<p>View Side Bar</p>	<p>Actions available display on the side bar. By making a selection, further actions will display</p>  <p>1. Select Blank AP Supplier Req or Main/Blanket Order template depending the type of purchase requisition you are creating.</p> <p>A blank purchase requisition screen will display for entry.</p>
<p>Use Side Bar</p>	<p>A new set of side bar actions will display for selection, explained as follows:</p>  <ol style="list-style-type: none"> 1. Select links for quick navigation to sections of the main screen 2. Key actions to Save or submit for approval as per the workflow



View Main Screen

The main screen for creating purchase requisition includes:

1. Requisition Header; Supplier, your department/location code, any contract values
2. Requisition Lines; Specific goods and services requested including quantity, cost, account number (cost centre, project and expense code)
3. Additional entry details; Supplementary information

Purchase Requisition

Location: Requisition Nbr:

Requisition Header

Supplier Account:* Sub Location:*

Supplier Name: Default Due Date:* [Apply to Lines](#)

Comments:

Reference:

Contract Reference:

Delivery Terms (line1):

(line2):

Contract Value \$:

Requisition Lines

Line Id	Line Type*	Identifier Nbr	Description	Classificati...	Servic...	GST	Order Unit Name	Order Qty	Order Unit Amt Ex	Order Amt Ex	Order GST Amt
*											
									0.000000	0.00	0.00

Default Accounts from previous line

Line Detail

Additional Line Text and Comments

Settings

Supplier Address

Attachments

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

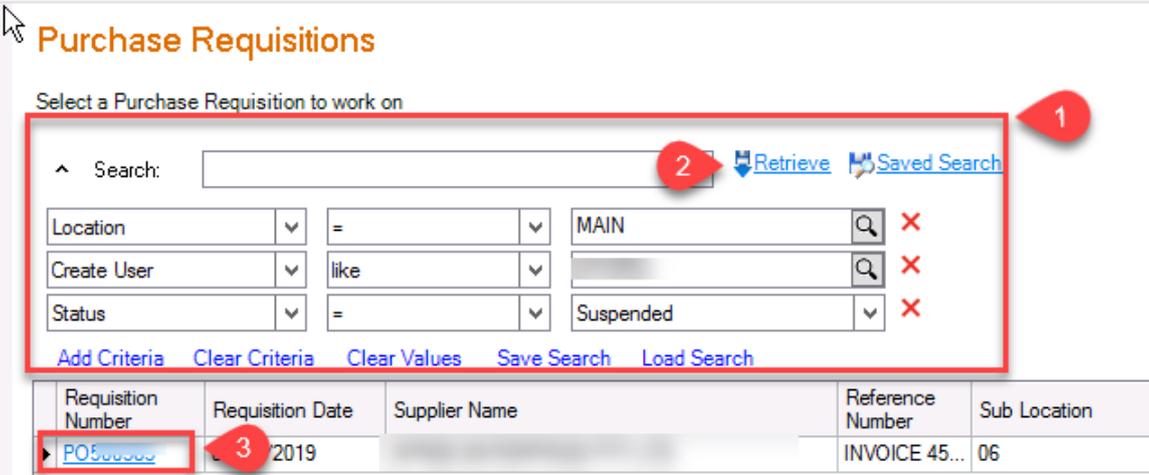
The main functions of this task allow purchase orders to be amended, receipted or cancelled. This applies to all purchase requisitions approved and sent to the supplier as a purchase order.

<p>Select Task</p>	<p>1. Click icon Amend, Receive or Cancel Purchase Orders</p> <div data-bbox="300 436 651 548" style="border: 1px solid blue; border-radius: 10px; padding: 5px; margin: 10px 0;"> </div>															
<p>View Key Actions</p>	<p>Actions available display on the side bar to perform the main functions to either receive, amend or cancel an order.</p> <div data-bbox="300 712 1465 1205" style="border: 1px solid #ccc; padding: 10px;"> <p>Tasks I Perform My Requisitions Enquire Reports My Workflow</p> <p>List help back home close clear retrieve</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>Actions to Perform 2</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Receive Goods <input checked="" type="checkbox"/> Amend Order <input checked="" type="checkbox"/> Cancel Order <input checked="" type="checkbox"/> Save as New Requisition <input type="checkbox"/> Re-Print Order 3 <input type="checkbox"/> Re-Print Last Amendment <p>Links to other Functions</p> <ul style="list-style-type: none"> <input type="checkbox"/> Order Detail Enquiry <input type="checkbox"/> Back Order Detail Enquiry </div> <div style="width: 65%;"> <p>Released Purchase Orders 1</p> <p>To find an order, enter the Location and Purchase Order Number</p> <p>Location: <input type="text" value="MAIN"/> <input type="button" value="Q"/> Order Number: <input type="text"/></p> <p>OR</p> <p>Enter search criteria and retrieve Purchase Orders</p> <p>Search: <input type="text"/> <input type="button" value="Retrieve"/> <input type="button" value="Saved Search"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Location</td> <td>=</td> <td>MAIN</td> <td><input type="button" value="Q"/></td> <td><input type="button" value="X"/></td> </tr> <tr> <td>Supplier Name</td> <td>like</td> <td></td> <td></td> <td><input type="button" value="X"/></td> </tr> <tr> <td>Requisition Create User</td> <td>=</td> <td>VSAGE</td> <td><input type="button" value="Q"/></td> <td><input type="button" value="X"/></td> </tr> </table> <p>Add Criteria Clear Criteria Clear Values Save Search Load Search</p> </div> </div> </div> <p>1. Search fields to locate and retrieve a purchase order</p> <p>2. Use Sidebar action (amend, receive or cancel) to adjust the fields for entry on the main screen</p> <p>3. Additional options for printing are available</p> <div data-bbox="300 1496 1471 1585" style="background-color: #f0f0f0; padding: 5px; margin: 10px 0;"> <p> Use the Reprint Purchase Order from the main screen to perform all printing functions if required</p> </div> <div data-bbox="363 1608 657 1702" style="border: 1px solid blue; border-radius: 10px; padding: 5px; margin: 10px 0;"> </div>	Location	=	MAIN	<input type="button" value="Q"/>	<input type="button" value="X"/>	Supplier Name	like			<input type="button" value="X"/>	Requisition Create User	=	VSAGE	<input type="button" value="Q"/>	<input type="button" value="X"/>
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Supplier Name	like			<input type="button" value="X"/>												
Requisition Create User	=	VSAGE	<input type="button" value="Q"/>	<input type="button" value="X"/>												



View & Navigate Maintain Purchase Requisitions

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

<p>Select Task</p>	<p>1. Click icon Maintain Purchase Requisitions</p> 																						
<p>View Key Actions</p>	 <p>Purchase Requisitions</p> <p>Select a Purchase Requisition to work on</p> <p>Search: <input type="text"/> Retrieve Saved Search</p> <table border="1"> <tr> <td>Location</td> <td>=</td> <td>MAIN</td> <td>X</td> </tr> <tr> <td>Create User</td> <td>like</td> <td></td> <td>X</td> </tr> <tr> <td>Status</td> <td>=</td> <td>Suspended</td> <td>X</td> </tr> </table> <p>Add Criteria Clear Criteria Clear Values Save Search Load Search</p> <table border="1"> <thead> <tr> <th>Requisition Number</th> <th>Requisition Date</th> <th>Supplier Name</th> <th>Reference Number</th> <th>Sub Location</th> </tr> </thead> <tbody> <tr> <td>PO500000</td> <td>2019</td> <td></td> <td>INVOICE 45...</td> <td>06</td> </tr> </tbody> </table> <ol style="list-style-type: none"> Search fields to locate purchase requisition Retrieve a purchase requisition Click on requisition number to adjust the fields for entry on the main screen 	Location	=	MAIN	X	Create User	like		X	Status	=	Suspended	X	Requisition Number	Requisition Date	Supplier Name	Reference Number	Sub Location	PO500000	2019		INVOICE 45...	06
Location	=	MAIN	X																				
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PO500000	2019		INVOICE 45...	06																			

Further Support

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