

PURCHASING HIGHLIGHTS FOR PS 8.4

What is New and Improved

The web-based functionality makes it more accessible and easier to use. You will need to use Internet Explorer Version 5.5 or higher.

The Menu collapses so that you have a larger working screen; Navigation is easier.

The pages are more customizable – many of the individual pages can be customized to only display the data field you actually use. For example, if you never use Program, Class or Project, you may hide those fields.

Improvements have been made in system functionality including the use of fewer pages and more default values during data entry. For example, Due Date, Category, UOM can be entered on the Header Defaults Page.

The Total Merchandise, Total Adjustments and Total amounts for all lines are prominently displayed on the REQ & PO Form pages for ease of use. As additional lines are added, the total dollar values are updated.

Changes you may want to make while entering/approving a Requisition or Purchase Order can be applied [retrofitted] to all lines via the Header Defaults Page. For example, if you wanted to change the chartfield information, you can apply it to all lines.

Purchase Order and Requisition data can be downloaded to directly into excel.

Search functions have improved:

Finding an existing value now includes new parameters, such as “Begins with/ contains”
Origin is a searchable field on both Requisitions & Purchase Orders
You can search for a Requisition based on “description”

Requisitions can be copied directly to a Purchase Order

Express PO function greatly reduces data entry for 1 or 2 line purchase orders.

New [STANDARD] Matching Rules:

Purchase Orders are no longer designated as either THREE-Way [receiving required] or TWO WAY [receiving not required]. Receiving requirements are indicated on each line so that we can issue Purchase Orders with a mix of receiving required or not required.

You may reprint reports which are still indicated on the Process Monitor. This saves re-running the report if you need to go back to it for some reason.

Last but not least, the finalization and RECON processes have been streamlined; individual lines may be finalized and eligible for RECON – you will not have to wait for the entire Purchase Order to be finalized.