



# Purchasing

## View Purchasing

This document contains step-by-step instructions to View Purchasing transactions in the *Galaxy* system.

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**Purchasing Management System**  
**View Purchasing**  
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## Introduction

The purpose of this document is to support the **Galaxy** end user in completing purchasing transactions in the **Galaxy** system. This manual incorporates step-by-step instructions for each purchasing screen found in the purchasing module of the **Galaxy** system. Each step is accompanied by a screen capture for easy viewing and further assistance.

The Purchasing module creates transactions that interface with other **Galaxy** modules.



The **Galaxy** Purchasing module is a line driven procurement tool. The purchasing activity begins with the requisition process. **Galaxy** has built in flexibility for electronic purchasing transactions to flow through various levels of user-defined approvals and district specific options.

Electronic purchasing transactions require information from various departments within the district. Prior to deploying **Galaxy** Purchasing, the district will use the Modify District Purchasing Options Screen to setup a series of district specific options. The district will also define user approvals and roles in the system.

### **Purchasing Module Components**

-  **Contract Management**
-  **Item Catalog**
-  **Location Management**
-  **Purchase Order Management**
-  **Purchase Requisition Managements**
-  **Receiving Management**
-  **User Security and Approvals**
-  **Vendor Management**

### **Other Modules receiving updates from **Galaxy** Purchasing**

#### **Accounts Payable**

-  The Purchasing system creates Accounts Payable transactions from Purchase Order payments, Direct Payments and Credit Memos.

#### **Asset Management**

-  Any purchases received or paid that meet GASB 34/35 requirements, will automatically become a pending asset and will be update to the Modify Asset Screen.

#### **Financial**

-  The Financial module maintains all of the purchasing encumbering and expenditure information.

#### **Year End Processing**

-  The Purchasing system sends accruals to the Modify A/P Accruals screen.
-  During the Accrual Processing Period, purchase order line items can be transferred back and forth between fiscal years.

## Support Plan

There will be trained staff available from the Data Center and Help Desk at RCOE to assist with **Galaxy** questions and to help resolve any issue which may arise. Initial calls for assistance will be made to the Data Center at 909-826-6524. Emails can be sent to [galaxy@rcoe.k12.ca.us](mailto:galaxy@rcoe.k12.ca.us). Should they need additional assistance, System Support will be available. Additional support is also available through the Applications Systems Trainers and the System Development Department. Should these avenues be unable to resolve the issue, our contacts at Optimus Consulting and Coyote Works will be notified.

## Manual Conventions

On any screen where the information has been changed, the  button must be clicked before leaving the screen. The data is not saved to the database until the **Save** button is clicked.

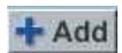
In most cases, leading zeros are not required, i.e. 0025 can be entered as 25.

Dates are entered in the following format (M/D/YY). An exception would be a year prior to 1950 which requires all four digits for the year, i.e. 1948.

Dashes are not allowed in **Galaxy**. Do not enter them in Social Security Numbers, phone numbers, etc.

The keyboard Tab key can be used on most screens to move to the next field. Shift-Tab will move the cursor to the previous field.

On screens where the following appears:



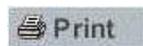
– Add new line or record - click the **Add** button and type in your data.



- Duplicate a line - If the line you are adding is similar to another line, select the similar line and click the **Dup** button. This will duplicate the line and you can then modify the data.



– Delete a line - select the line by clicking on it and click the **Delete** button to delete the entire row or record.

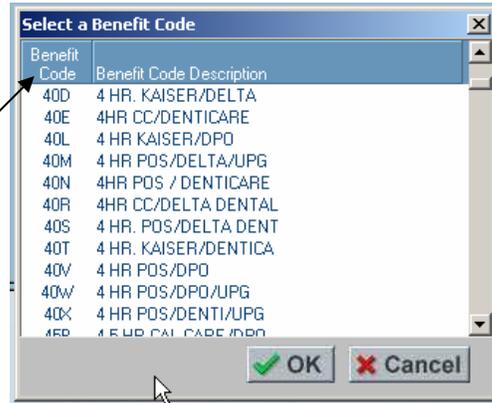


- **Print** the data - The information displayed can be printed from the browser or copied to Excel by clicking the **Print** button. A document describing how to make Excel the default for the Galaxy print button is available on the Galaxy Training web site.

To Modify existing data - click in the field you want to modify, delete the data in the field with the keyboard Delete key, and type in the new data.

Wherever a button is described, the name is displayed in bold type, i.e. **Save**, **Print**, etc.

The columns on the screens and pop up lists can be sorted in ascending order by clicking on a column heading (shift-click for descending).



## Purchasing Module Navigation Menu

- [-]  Purchasing (Beta Test)
  - [+]  Contract Management
    -  Direct Payment Management
  - [+]  Item Catalog
  - [+]  Location Management
  - [+]  Purchase Order Management
  - [+]  Purchase Requisition Management
  - [+]  Receiving Management
  - [+]  User Security and Approvals
  - [+]  Vendor Management
  - [+]  View Purchasing
  
- [-]  Contract Management
  -  Approve Contracts
  -  Close Out Contracts
  -  Modify Contract
  
- [-]  Item Catalog
  -  Modify Item
  -  Modify Item Category
  
- [-]  Location Management
  -  Modify Location
  -  Modify Worksite Location
  
- [-]  Purchase Order Management
  -  Approve Purchase Orders
  -  Close Out Purchase Orders
  -  Modify Open Purchase Order
  -  Modify Purchase Order
  -  Print Purchase Orders
  
- [-]  Purchase Requisition Management
  -  Approve Purchase Requisitions
  -  Modify Internal Transfer Purchase Requisition
  -  Modify Internal Transfer Types
  -  Modify Open Purchase Requisition
  -  Modify Purchase Requisition
  -  Process Internal Transfer Purchase Requisition
  
- [-]  Receiving Management
  -  Receive Items

- [-]  User Security and Approvals
  -  Modify Approval List
  -  Modify District Purchasing Options
  -  Modify SACS Approval List
  -  Modify Substitute User
  -  Modify User Alias
  -  Modify User Approval List
  -  Modify User Roles
  -  Modify User SACS Account Favorites
  
- [-]  Vendor Management
  -  Modify Note
  -  Modify Vendor
  -  Modify Vendor/Payee Names
  
- [-]  View Purchasing
  -  View Approval List
  -  View Contracts
  -  View District Purchasing Options
  -  View Internal Transfer Types
  -  View Item
  -  View Item Category
  -  View Location
  -  View Note
  -  View Purchase Orders
  -  View Purchase Requisitions
  -  View SACS Approval List
  -  View Substitute User
  -  View User Alias
  -  View User Approval List
  -  View User Roles
  -  View User SACS Account Favorites
  -  View Vendor
  -  View Worksite Location



## **View Purchasing**

View Purchasing consists of the following screens:

- View Approval List
- View Contracts
- View District Purchasing Options
- View Internal Transfer Types
- View Item
- View Item Category
- View Location
- View Note
- View Purchase Orders
- View Purchase Requisitions
- View SACS Approval List
- View Substitute User
- View User Alias
- View User Approval List
- View User Roles
- View User SACS Account Favorites
- View Vendor
- View Worksite Location

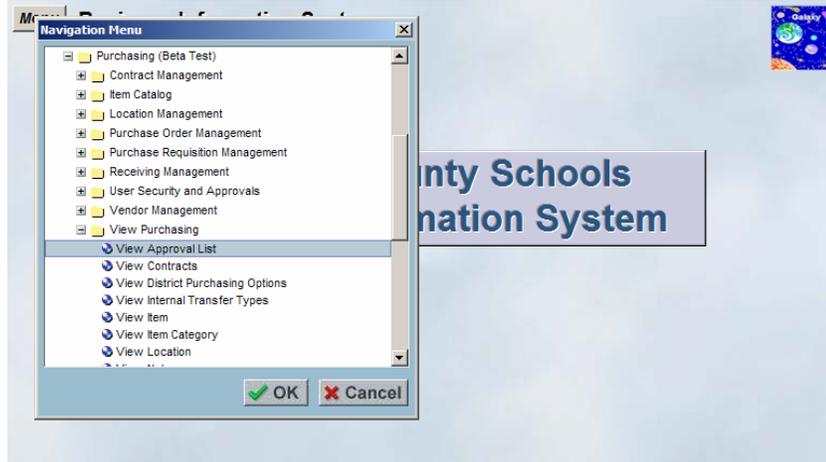
### View Approval List

This screen is used view approval list information.

#### Step 1

From menu select  
View Approval List

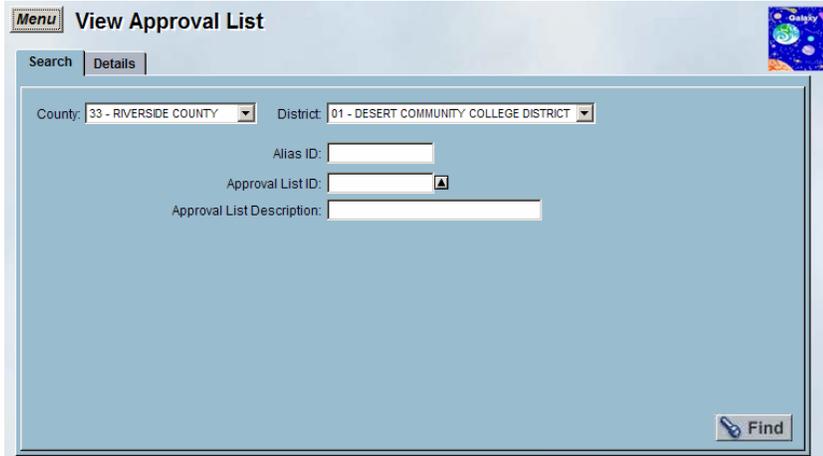
Click **OK**.



#### Step

To view approval  
list(s) enter/select  
desired information

Click **Find**.



NOTE: Clicking "Find" without entering or selecting any search criteria will display a list of all approval lists on the Details Tab.

Step  
View approval  
list(s)

Click on the (+) to  
expand the line and  
view information  
associated to that  
approval list.

Approval List ID	Approval List Description	Approval List Active?
FDR-01	APPROVAL LIST FOR P.O.	Y
FDR-02	TEST COMPUTER SUPPLIES	Y

Approval Priority	Alias ID	Approval User ID	Approval User Name	Approval From Amount	Approval To Amount
1	SUPERVISORS	047200	ALM, TERRI L	100.00	500.00

NOTE: Click the print button to print all approval list data to an html file, which is typically displayed by a web browser.

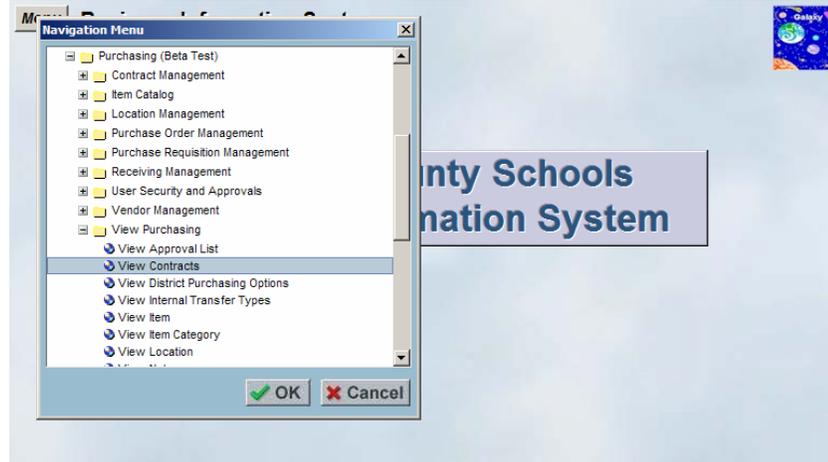
### View Contracts

This screen is used view contracts information.

#### Step 1

From menu select  
View Contract

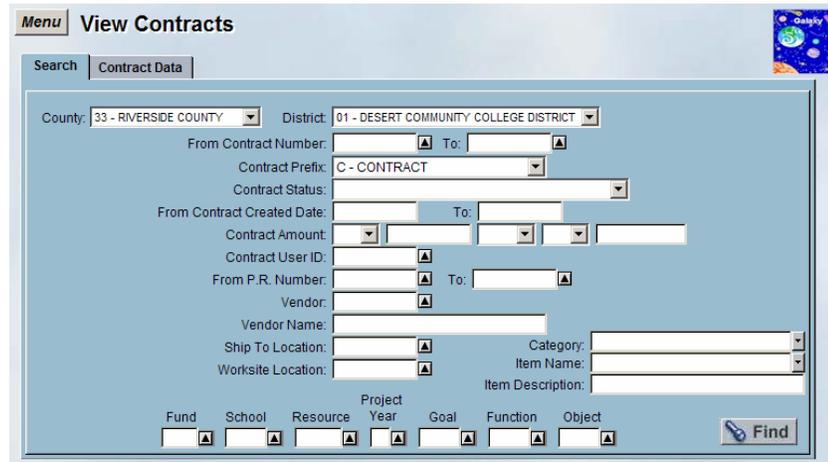
Click **OK**.



#### Step

To view  
contract(s)  
enter/select desired  
information

Click **Find**.

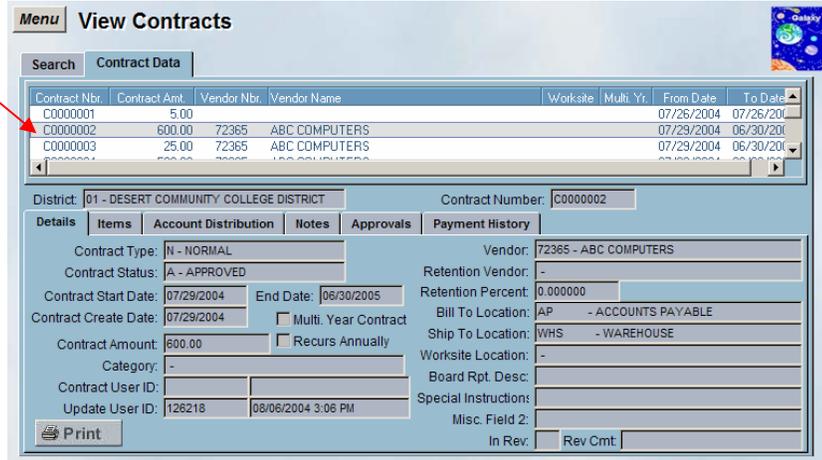


**NOTE:** Clicking "Find" without entering or selecting any search criteria will display a list of all Contracts on the Contract Data Tab.

Step  
Double click on the Contract in the upper window to populate the sub tabs.

View Details information.

Click **Items** tab

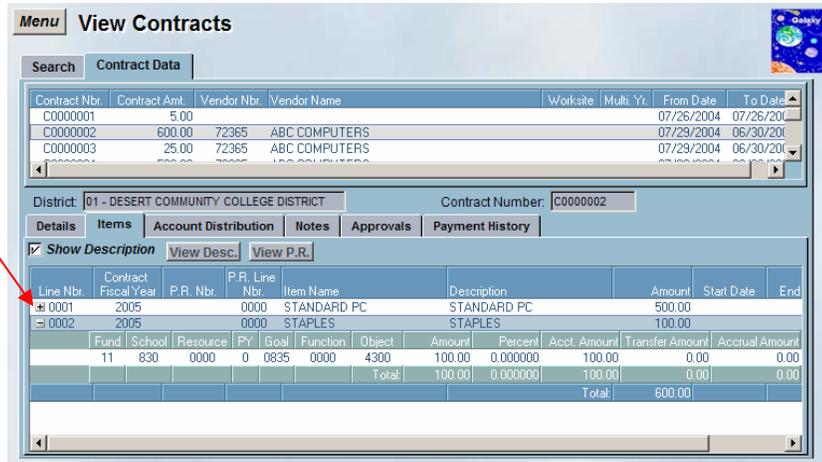


NOTE: Click the print button to print all contract data to an html file, which is typically displayed by a web browser.

Step  
View item(s) associated to the contract.

Click on the (+) to expand the line and view information associated to that line item.

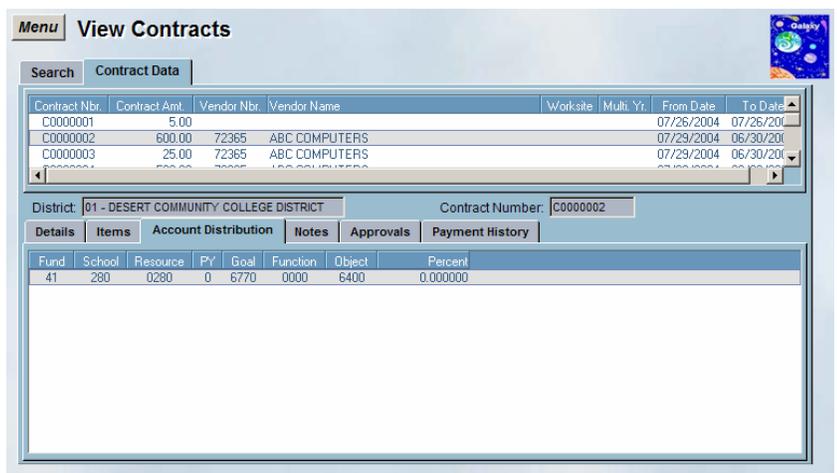
Click **Account Distribution** sub tab



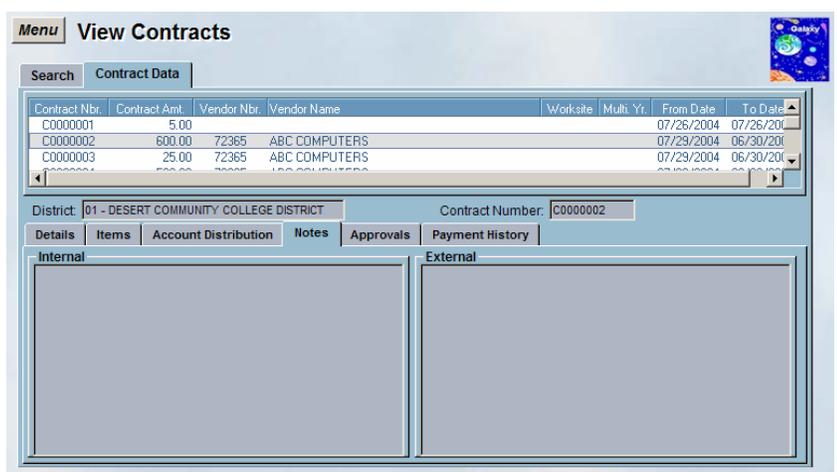
NOTES:

- “View Desc.” button prompts a view only window to view a more detailed description of the item
- “View P.R.” button prompts the purchase requisition associated to this contract.

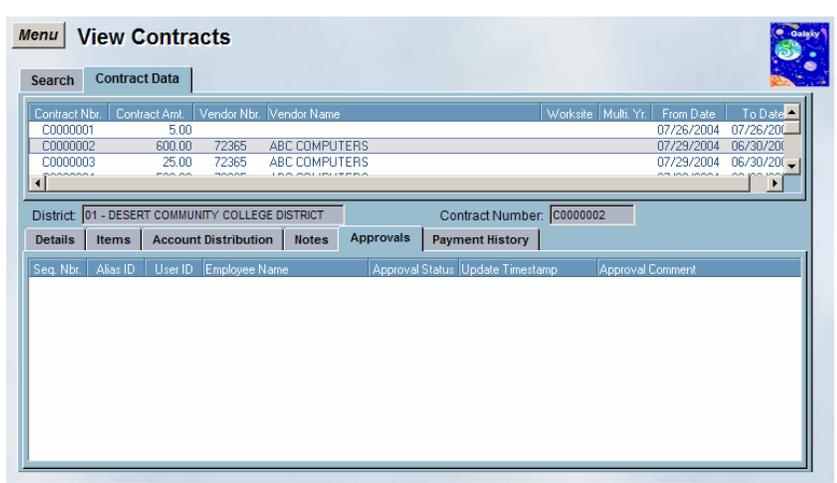
Step  
View account distribution associated to the contract.  
  
Click **Notes** sub tab



Step  
View notes associated to the contract.  
  
Click **Approvals** sub tab



Step  
View notes associated to the contract.  
  
Click **Payment History** sub tab



Step  
View payment  
history associated to  
the contract.

**Menu View Contracts**

Search **Contract Data**

Contract Nbr.	Contract Amt.	Vendor Nbr.	Vendor Name	Worksite	Multi. Yr.	From Date	To Date
C0000001	5.00					07/26/2004	07/26/2004
C0000002	600.00	72365	ABC COMPUTERS			07/29/2004	06/30/2005
C0000003	25.00	72365	ABC COMPUTERS			07/29/2004	06/30/2005

District: **D1 - DESERT COMMUNITY COLLEGE DISTRICT** Contract Number: **C0000002**

Details **Items** Account Distribution Notes Approvals **Payment History**

Invoice Nbr.	Vendor	Invoice Status	Board Report Description	Fiscal Year	Payment Amount	Invoice Date	Invoice Amount	Created By
				Total				

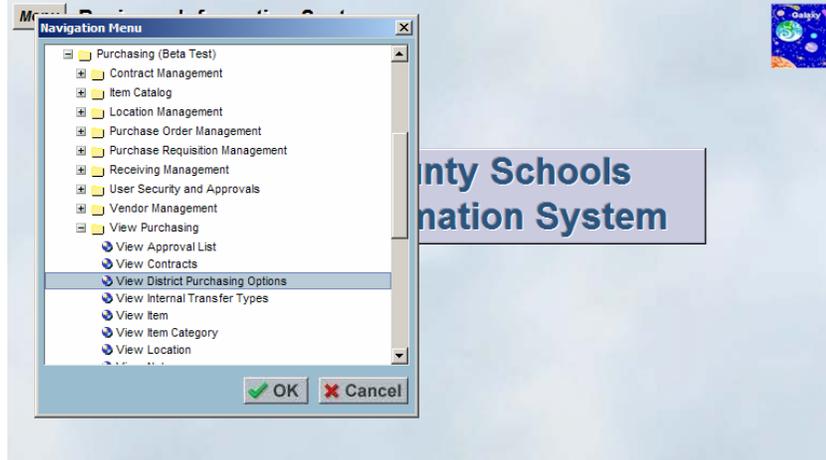
### View District Purchasing Options

This screen is used view district purchasing options information.

#### Step 1

From menu select  
View District  
Purchasing Options

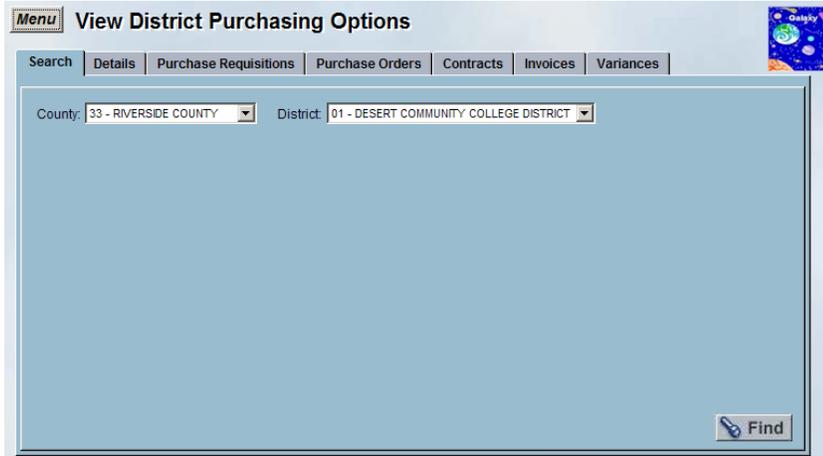
Click **OK**.



#### Step

To view district  
purchasing options

Click **Find**



Step  
View district purchasing options Details tab.  
  
Click **Purchase Requisitions** tab

Step  
View district purchasing options Purchase Requisitions tab.  
  
Click **Purchase Orders** tab

Step  
View district purchasing options Purchase Orders tab.  
  
Click **Contracts** tab

Step  
View district  
purchasing options  
Contracts tab.

Click **Invoices** tab

The screenshot shows the 'View District Purchasing Options' interface with the 'Invoices' tab selected. The 'District' dropdown is set to '01 - DESERT COMMUNITY COLLEGE DISTRICT'. The 'Budget Check Options' section includes three radio buttons: 'Continuous Budget Check', 'Require Budget Check before Submission', and 'Budget Check on Final Approval Only'. The 'Options' section includes checkboxes for 'Item Category Required', 'Board Report Desc Required', and 'User Assigned Contract Numbers'. There are also input fields for 'Misc. Label 1', 'Misc. Label 2', and 'Bid Limit Amt.'. The 'Approval Steps' section has dropdown menus for 'User Approval List Step', 'SACS Approval List Step', 'Location Approval List Step', and 'Category Approval List Step'. The 'Update User ID' and 'Update Timestamp' fields are also present.

Step  
View district  
purchasing options  
Invoices tab.

Click **Variations**  
tab

The screenshot shows the 'View District Purchasing Options' interface with the 'Variations' tab selected. The 'District' dropdown is set to '01 - DESERT COMMUNITY COLLEGE DISTRICT'. The 'Defaults' section includes a checkbox for 'Default Freight Flag'. The 'Update User ID' and 'Update Timestamp' fields are also present.

Step  
View district  
purchasing options  
Variations tab.

The screenshot shows the 'View District Purchasing Options' interface with the 'Variations' tab selected. The 'District' dropdown is set to '01 - DESERT COMMUNITY COLLEGE DISTRICT'. Below the 'Price' section, there is a table with columns: 'From Amount', 'To Amount', 'Percent', 'Limit Amount', and 'Update Timestamp'. Below the 'Quantity' section, there is a table with columns: 'From Quantity', 'To Quantity', 'Percent', 'Limit Amount', and 'Update Timestamp'.

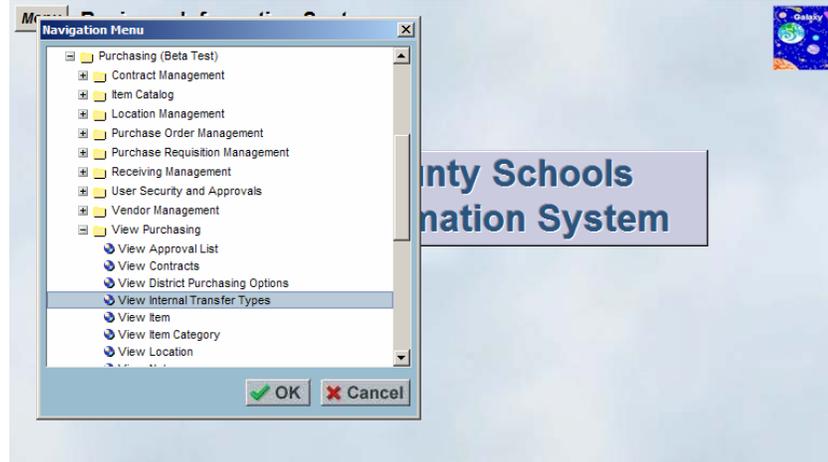
### View Internal Transfer Types

This screen is used view internal transfer types information.

#### Step 1

From menu select  
View Internal  
Transfer Types

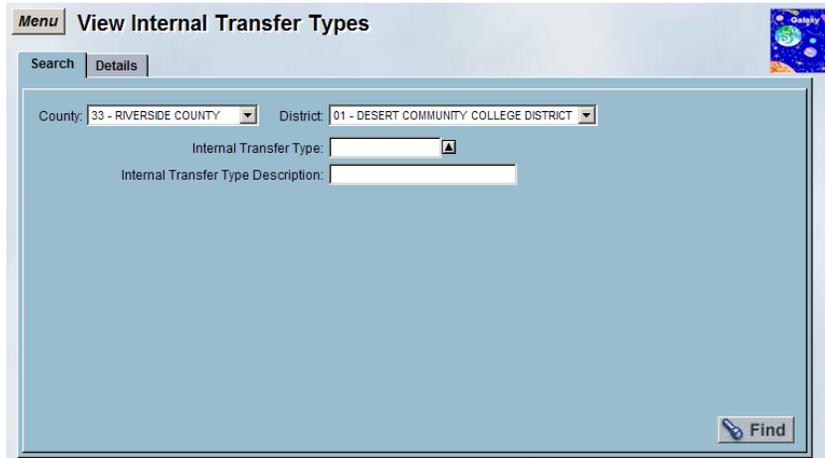
Click **OK**.



#### Step

To view internal  
transfer type(s)  
enter/select desired  
information.

Click **Find**



NOTE: Clicking "Find" without entering or selecting any search criteria will display a list of all Internal Transfer Types on the Details tab.

Step  
View internal  
transfer types.

Internal Transfer Type	Internal Transfer Type Description	Fund	School	Resource	PY	Goal	Function	Object
FI	FIELD TRIP	41	280	0280	0	5770	0000	5400
REPRO	REPROGRAPHICS REQUEST	11	830	0000	0	0835	0000	4300

NOTE: Click the print button to print all internal transfer types data to an html file, which is typically displayed by a web browser.

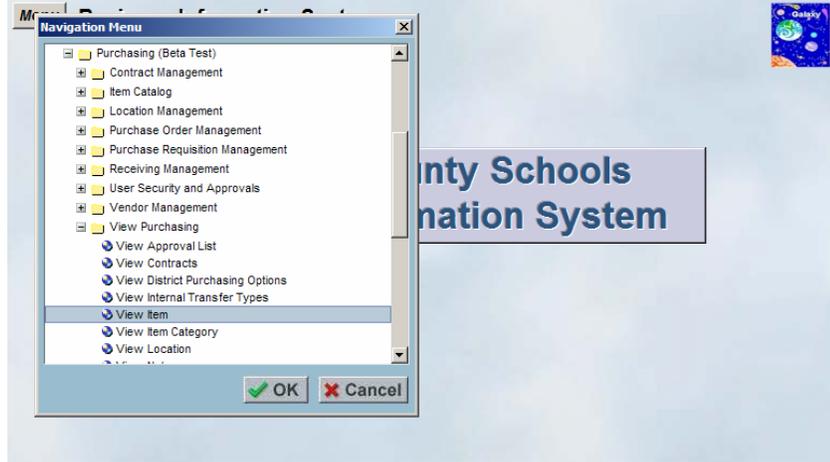
### View Item

This screen is used view item information.

#### Step 1

From menu select  
View Item

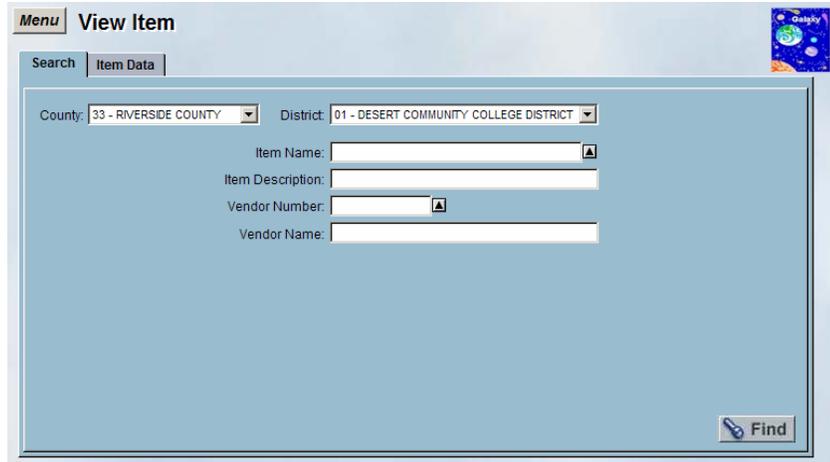
Click **OK**.



#### Step

To view item(s)  
enter/select desired  
information.

Click **Find**



**NOTE:** Clicking “Find” without entering or selecting any search criteria will display a list of all Items on the Item Data tab.

Step  
Double click on the Item in the upper window to populate the sub tabs.  
  
View Detail information.  
  
Click **Item Categories** tab

The screenshot shows the 'View Item' window with the 'Item Data' tab selected. It displays a list of items with 'STANDARD PC' selected. Below the list, the 'Details' tab is active, showing the item description 'STANDARD PC', unit of measurement 'EA', and unit price '550.00'. There are also checkboxes for 'Active', 'Taxable', 'Stocked', and 'Automatic Receipt'. At the bottom, there is a 'Last Purchase Order' section with fields for P.O. Number (P0000003), Date (08/05/2004), and Vendor (72365 -- ABC COMPUTERS).

Step  
View item categories associated to the item.  
  
Click **Vendors** sub tab

The screenshot shows the 'View Item' window with the 'Item Categories' tab selected. It displays a table of item categories associated with the selected item. The table has columns for 'Item Category Name', 'Item Category Description', and 'Buyer Name'. One category is listed: 'COMPUTERS' with description 'COMPUTER PURCHASES'.

Step  
View vendors associated to the item.  
  
Click **Notes** sub tab

The screenshot shows the 'View Item' window with the 'Vendors' tab selected. It displays a table of vendors associated with the selected item. The table has columns for 'Vendor Name', 'Primary Vendor', 'Catalog Number', 'Vendor Unit Price', 'Item Catalog Unit Price', 'Unit of Measurement', and 'Item Active?'. Two vendors are listed: '25815 LOWE'S BUSINESS ACCOUNT/GEC' and '72365 ABC COMPUTERS'.

Vendor Name	Primary Vendor	Catalog Number	Vendor Unit Price	Item Catalog Unit Price	Unit of Measurement	Item Active?
25815 LOWE'S BUSINESS ACCOUNT/GEC	N			550.00	EA	Y
72365 ABC COMPUTERS	N			550.00	EA	Y

Step  
View notes  
associated to the item.

The screenshot displays the 'View Item' interface in the Galaxy Purchasing system. At the top, there is a 'Menu' button and the title 'View Item'. Below this is a search bar with 'Item Data' selected. A table lists items with columns for 'Item Name' and 'Item Description'. The table contains four rows: 'OPEN PO' (OPEN PURCHASE ORDER), 'PENCILS' (WRITING INSTRUMENT), 'STANDARD PC' (STANDARD PC), and 'STAPLES' (STAPLES). Below the table, there are input fields for 'District' (01 - DESERT COMMUNITY COLLEGE DISTRICT) and 'Item Name' (STANDARD PC). A set of tabs includes 'Details', 'Item Categories', 'Vendors', and 'Notes', with 'Details' being the active tab. Under the 'Details' tab, there are two sections: 'Internal' and 'External', both of which are currently empty.

Item Name	Item Description
OPEN PO	OPEN PURCHASE ORDER
PENCILS	WRITING INSTRUMENT
STANDARD PC	STANDARD PC
STAPLES	STAPLES

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT      Item Name: STANDARD PC

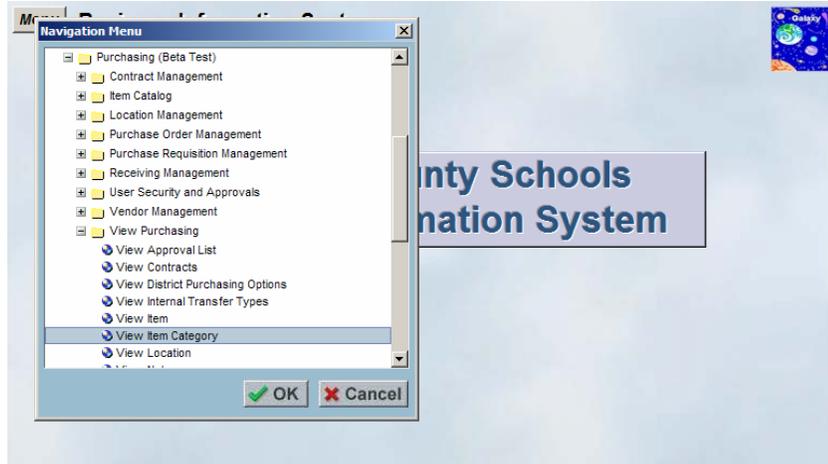
Details | Item Categories | Vendors | Notes

Internal      External

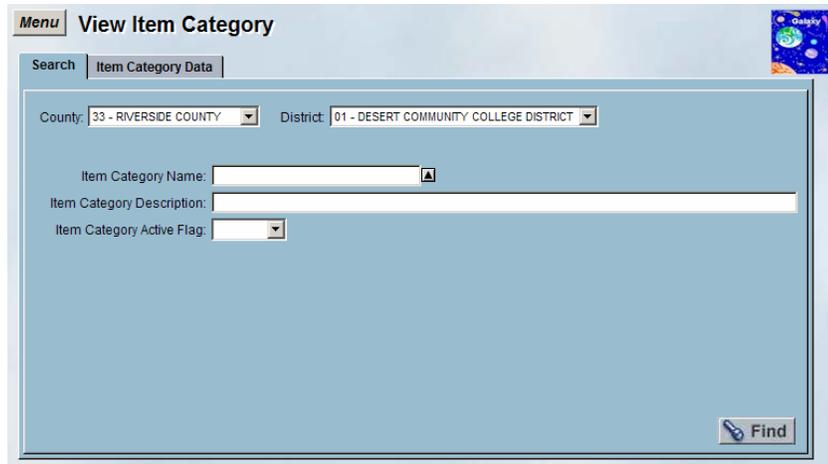
### View Item Category

This screen is used view item category information.

Step 1  
From menu select  
View Item Category  
  
Click **OK**.



Step  
To view item  
categories enter/select  
desired information.  
  
Click **Find**



NOTE: Clicking “Find” without entering or selecting any search criteria will display a list of all Item Categories on the Item Category Data tab.

Step  
Double click on the Item Category in the upper window to populate the sub tabs.

View Details information.

Click **Items** sub tab

Item Category Code	Item Category Description	Item Category Active?
COMPUTERS	COMPUTER PURCHASES	Y
OFFICE SUPPLIES	FOR OFFICE USE ONLY	Y
TRIPS	ALL TRIPS FOR 2005	Y

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT      Item Category Name: COMPUTERS

Buyer User ID: 126218  
Approval List ID:  
 Automatic Receipt  
Update User ID: 126218  
Update Timestamp: 7/26/2004 2:58 PM

NOTE: Click the print button to print all item category data to an html file, which is typically displayed by a web browser.

Step  
View item(s) associated to the contract.

Item Category Code	Item Category Description	Item Category Active?
COMPUTERS	COMPUTER PURCHASES	Y
OFFICE SUPPLIES	FOR OFFICE USE ONLY	Y
TRIPS	ALL TRIPS FOR 2005	Y

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT      Item Category Name: COMPUTERS

Item Name	Item Description	Unit Price U/M	Item Active?
STANDARD PC	STANDARD PC	550.00 EA	Y

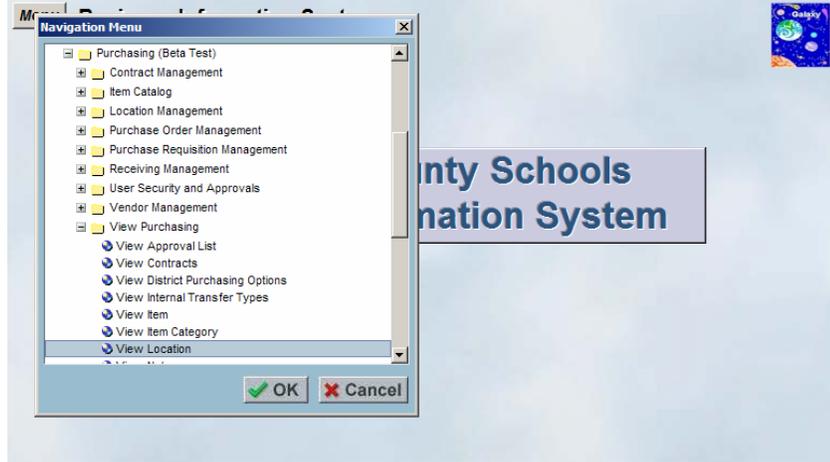
### View Location

This screen is used view location information.

#### Step 1

From menu select  
View Location

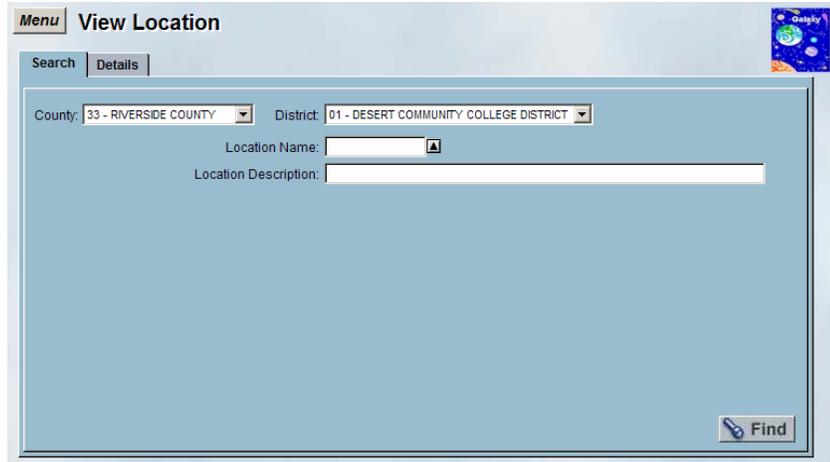
Click **OK**.



#### Step

To view location  
enter/select desired  
information

Click **Find**.



NOTE: Clicking “Find” without entering or selecting any search criteria will display a list of all Locations on the Details tab.

Step  
View location  
information.

Scroll to the right  
to view additional  
fields.

Location Name	Location Description	Location Contact	Address Line 1	Address Line 2
AP	ACCOUNTS PAYABLE	JEANETTE TAYLOR	43-500 MONTEREY AVENUE	
CAB	CAB	JOE	43-500 MONTEREY AVENUE	
WHS	WAREHOUSE	ELAINE SNYDER	43-500 MONTEREY AVENUE	
ACCT PAY	ACCOUNTS PAYABLE	MARLENE REYNOLDS	43-500 MONTEREY AVENUE	

**NOTE:** Click the print button to print all location data to an html file, which is typically displayed by a web browser.

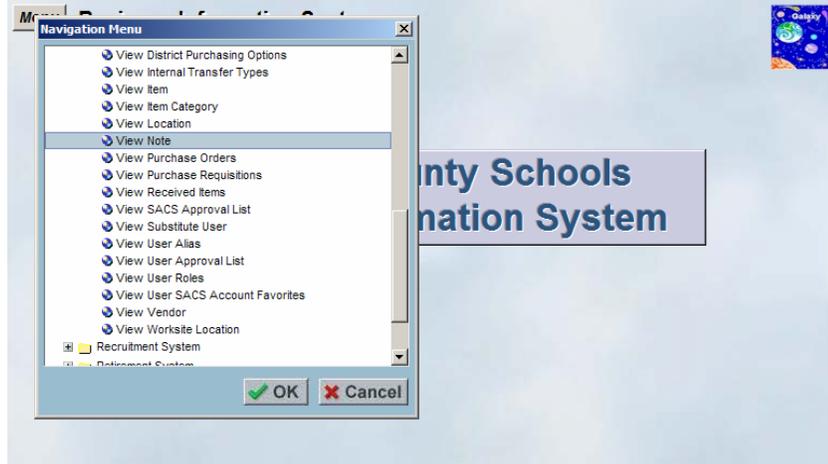
### View Note

This screen is used view note information.

#### Step 1

From menu select  
View Note

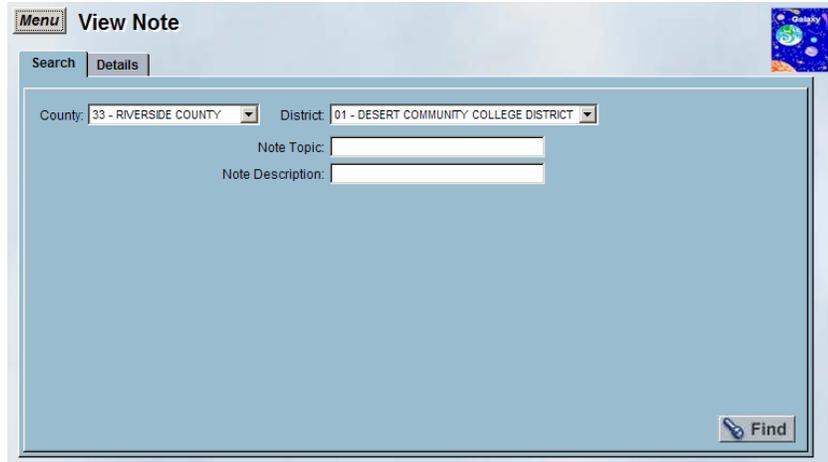
Click **OK**.



#### Step

To view notes  
enter/select desired  
information.

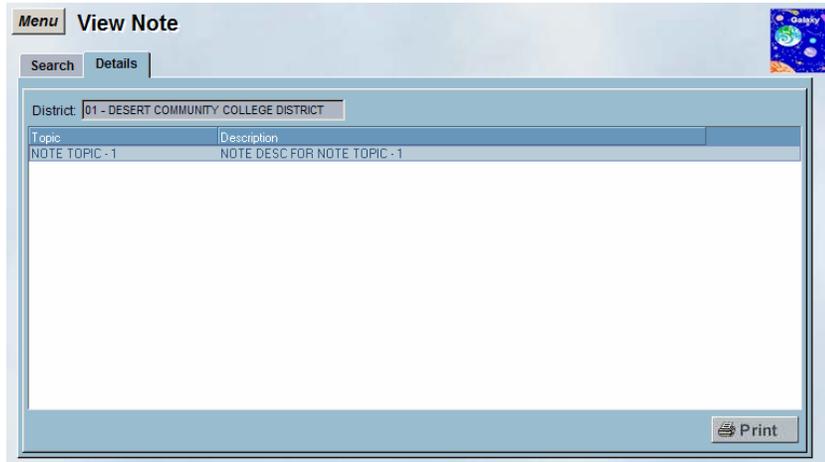
Click **Find**



NOTE: Clicking “Find” without entering or selecting any search criteria will display a list of all Notes on the Details tab.

Step  
View note  
information.

Scroll to the right  
to view additional  
fields.

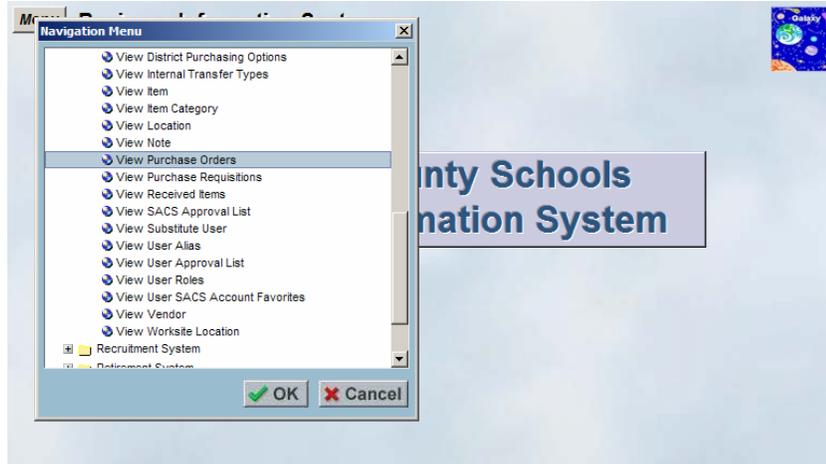


**NOTE:** Click the print button to print all note data to an html file, which is typically displayed by a web browser.

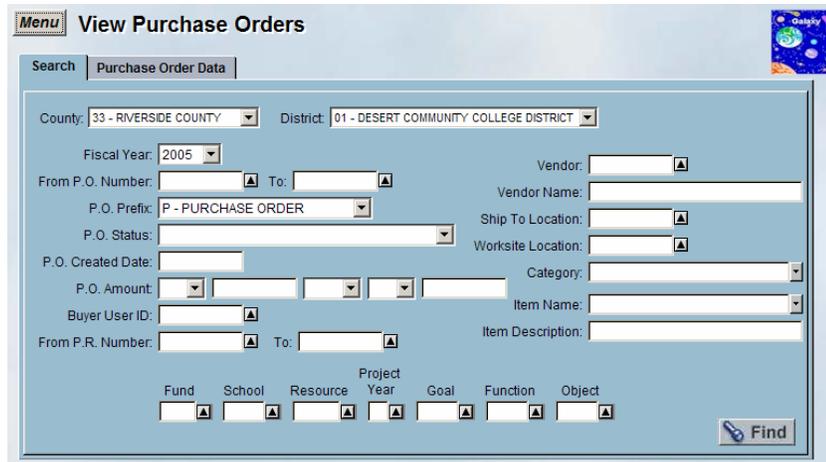
### View Purchase Orders

This screen is used view purchase orders information.

Step 1  
From menu select  
View Purchase Order  
  
Click **OK**.



Step  
To view purchase  
order(s) enter/select  
desired information.  
  
Click **Find**



**NOTE:** Clicking “Find” without entering or selecting any search criteria will display a list of all Purchase Orders on the Purchase Order Data tab.

Step

Double click on the Purchase Order in the upper window to populate the sub tabs.

View Details information.

Click **Items** tab

Step

View item(s) associated to the purchase order.

Click on the (+) to expand the line and view information associated to that line item.

Scroll to the right to view additional fields.

Click **Account Distribution** sub tab

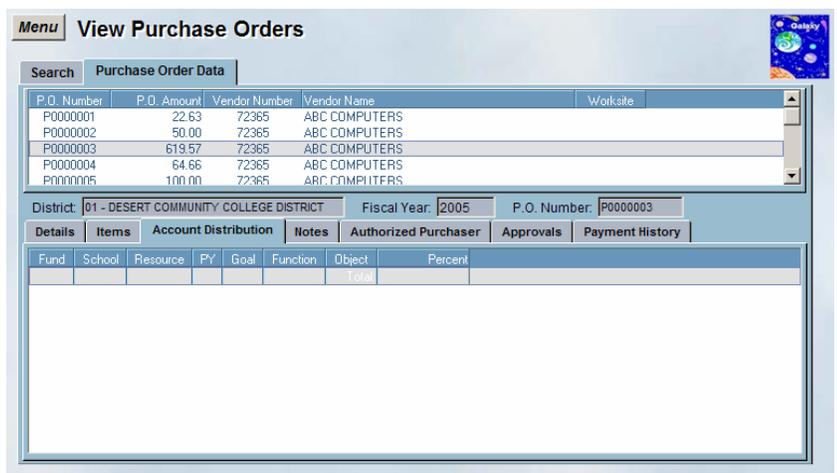
Line Nbr.	P.R. Nbr.	P.R. Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	
0001	R0000004	0001	STANDARD PC	STANDARD PC	1.00	550.00	EA	550.00	
0002	R0000004	0002	ACCESSORIES	Accessory Pack	1.00	25.00	EA	25.00	
					<b>Total</b>	<b>0.00</b>	<b>1.000000</b>	<b>26.94</b>	
								<b>Total</b>	<b>575.00</b>

NOTES:

- “View Desc.” button prompts a view only window to view a more detailed description of the item.
- “View P.R.” button prompts the purchase requisition associated to this purchase order.

Step  
View account distribution associated to the purchase order.

Click **Notes** sub tab



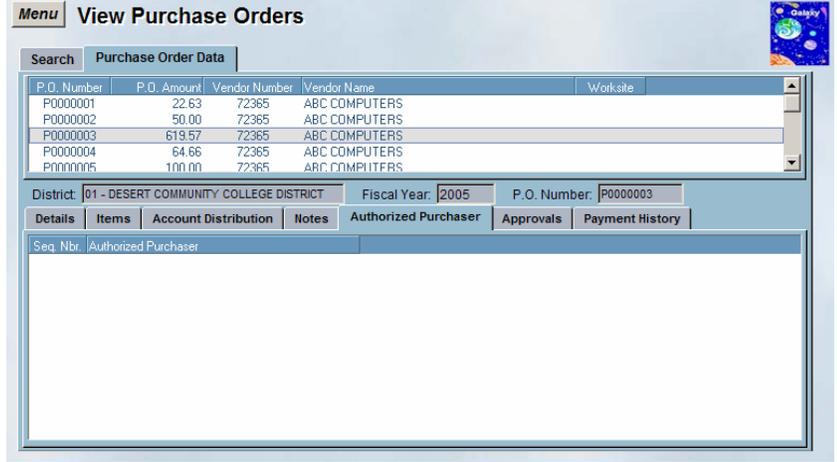
Step  
View notes associated to the purchase order.

Click **Authorized Purchaser** sub tab



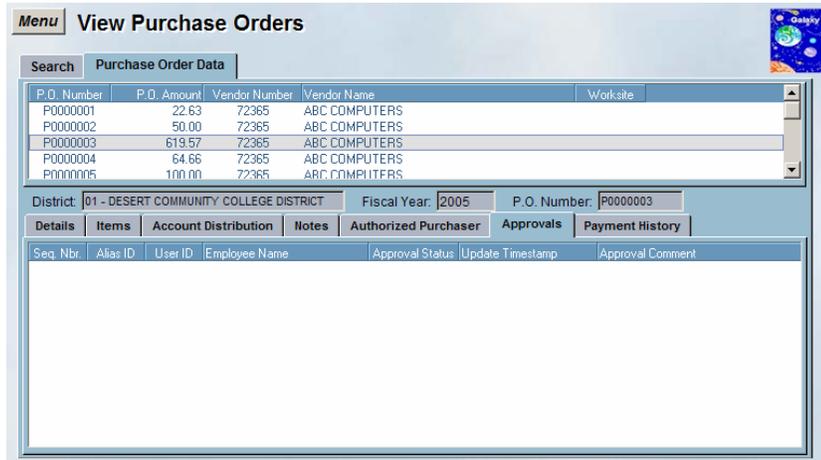
Step  
View authorized purchasers associated to the purchase order.

Click **Approvals** sub tab



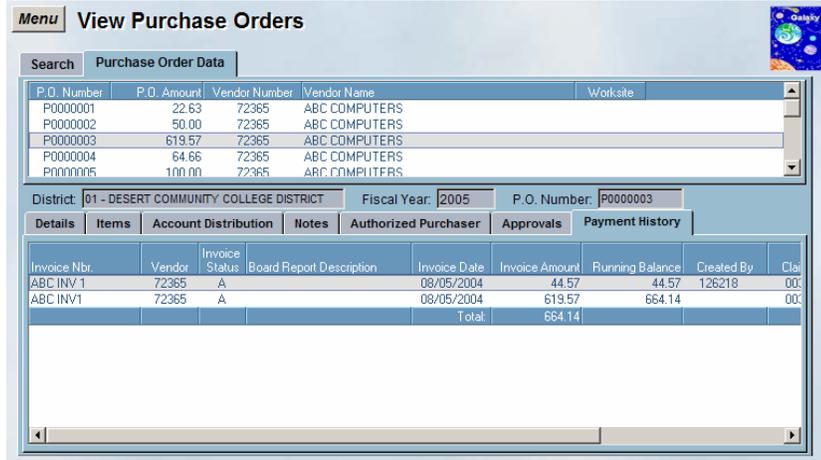
Step  
View approvals  
associated to the  
purchase order.

Click **Payment  
History** sub tab



Step  
View payment  
history associated to  
the purchase order

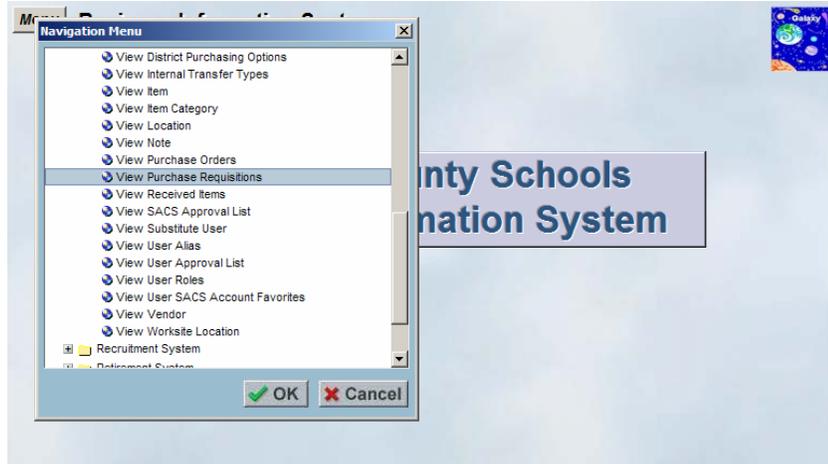
Scroll to the right  
to view additional  
fields.



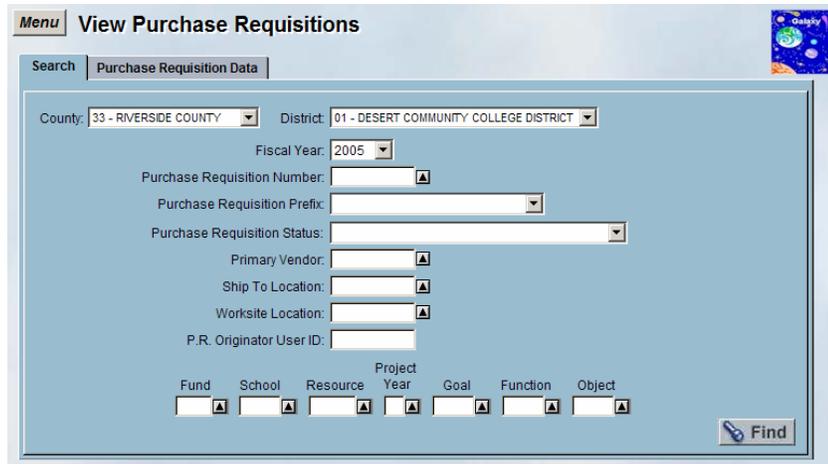
### View Purchase Requisitions

This screen is used view purchase requisitions information.

Step 1  
From Menu select  
View Purchase  
Requisitions  
  
Click **OK**.



Step  
To view purchase  
requisition(s)  
enter/select desired  
information.  
  
Click **Find**



NOTE: Clicking "Find" without entering or selecting any search criteria will display a list of all Purchase Requisitions on the Purchase Requisition Data tab.

Step  
Double click on the Purchase Requisition in the upper window to populate the sub tabs.

View Details information.

Click **Items** tab

Step  
View item(s) associated to the purchase requisition.

Click on the (+) to expand the line and view information associated to that line item.

Scroll to the right to view additional fields.

Click **Account Distribution** sub tab

NOTE: “View Desc.” button prompts a view only window to view a more detailed description of the item.

Step  
View account distribution associated to the purchase requisition.  
  
Click **Notes** sub tab

**Menu View Purchase Requisitions**

Search **Purchase Requisition Data**

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2005	R0000002	72365	ABC COMPUTERS	25.00	ABC USER	102 - INFORMATION S
2005	R0000003			50.00		
2005	R0000004	72365	ABC COMPUTERS	619.57	ABC USER1	
2005	R0000005			50.00		

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2005 P.R. Number: R0000004

Details **Items** Account Distribution **Notes** Authorized Purchaser Approvals

Fund	School	Resource	PY	Goal	Function	Object	Percent	Total

Step  
View notes associated to the purchase requisition.  
  
Click **Authorized Purchaser** sub tab

**Menu View Purchase Requisitions**

Search **Purchase Requisition Data**

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2005	R0000002	72365	ABC COMPUTERS	25.00	ABC USER	102 - INFORMATION S
2005	R0000003			50.00		
2005	R0000004	72365	ABC COMPUTERS	619.57	ABC USER1	
2005	R0000005			50.00		

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2005 P.R. Number: R0000004

Details **Items** Account Distribution Notes **Authorized Purchaser** Approvals

**Internal** Standard PC replacement purchase for ABC USER  
\*\*INTERNAL NOTES DO NOT PRINT ON REQS. INTERNAL NOTES ARE ONLY VISIBLE IN THE SYSTEM\*\*

**External** This office will be closed from December 20, 2004 through January January 2, 2005.  
\*\*EXTERNAL NOTES PRINT ON REQUISITION\*\*

Step  
View authorized purchasers associated to the purchase requisition.  
  
Click **Approvals** sub tab

**Menu View Purchase Requisitions**

Search **Purchase Requisition Data**

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2005	R0000002	72365	ABC COMPUTERS	25.00	ABC USER	102 - INFORMATION S
2005	R0000003			50.00		
2005	R0000004	72365	ABC COMPUTERS	619.57	ABC USER1	
2005	R0000005			50.00		

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2005 P.R. Number: R0000004

Details **Items** Account Distribution Notes Authorized Purchaser **Approvals**

Seq. Nbr.	Authorized Purchaser

Step  
View approvals  
associated to the  
purchase requisition.

**Menu View Purchase Requisitions**

**Search Purchase Requisition Data**

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Work Site
2005	R0000002	72365	ABC COMPUTERS	25.00	ABC USER	102 - INFORMATION S
2005	R0000003			50.00		
2005	R0000004	72365	ABC COMPUTERS	619.57	ABC USER1	
2005	R0000005			50.00		

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2005 P.R. Number: R0000004

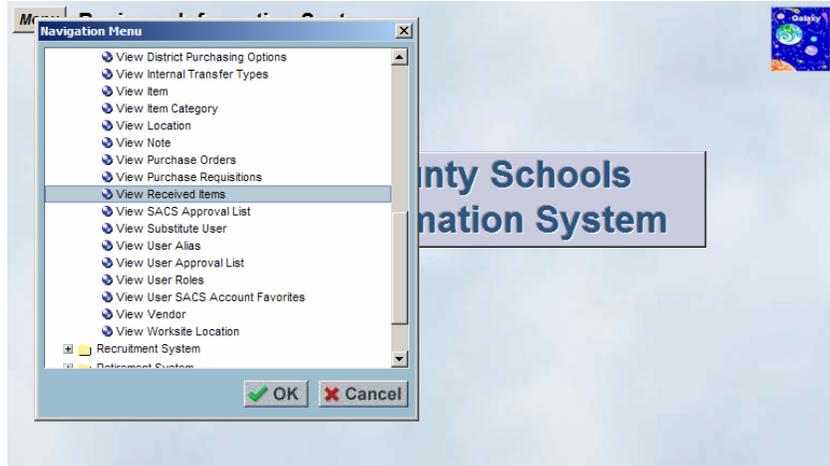
**Details Items Account Distribution Notes Authorized Purchaser Approvals**

Seq. Nbr.	Alias ID	User ID	Employee Name	Approval Status	Update Timestamp	Approval Comment

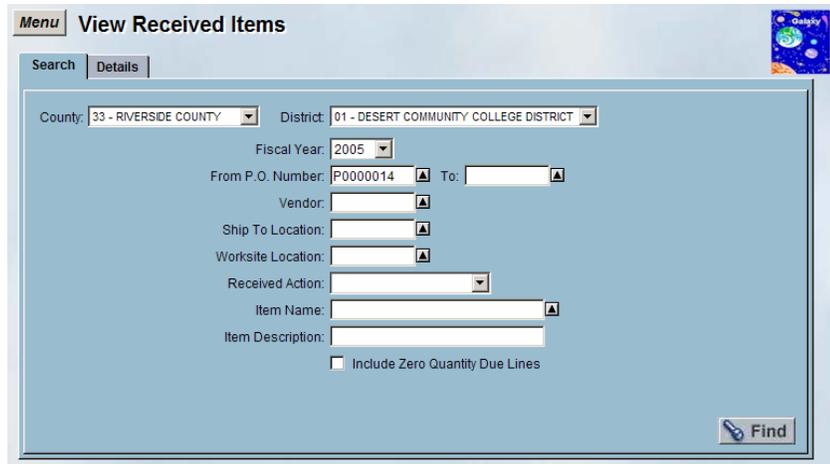
### View Received Items

This screen is used view worksite location information.

Step 1  
From menu select  
View Received Items  
  
Click **OK**.



Step  
To view received  
item(s), enter/select  
information as  
available.  
  
Must enter/select  
at least one selection  
from Search criteria.  
  
Click **Find**.



Step  
View item  
received information  
for the purchase  
order(s) selected.

**Menu View Received Items** 

Search Details

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2005 P.O. Number: P0000014 

Show Desc. View Desc. View P.O. Vendor Name: ABC COMPUTERS

**P.O. Information**

P.O. Nbr.	P.O. Line	Item Name	Item Description	U/M	P.O. Qty.	Previously Recvd. Qty.	Qty. Due
P0000014	0001	SAMPLE ITEM	sample item	EA	5.00	3.00	2.00

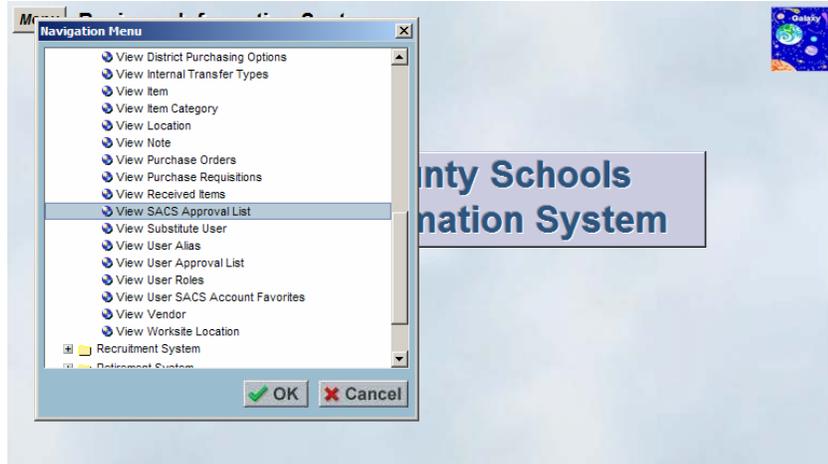
**Received Information**

Recvd. Date	Qty. Recvd.	Recvd. Action	Action Description	Comment	User ID
09/09/2004	3.00	1	RECEIVED		126218
09/09/2004	3.00	1	RECEIVED		126218
09/09/2004	-3.00	4	CORRECTION OF EI		126218
<b>Total:</b>	<b>3.00</b>				

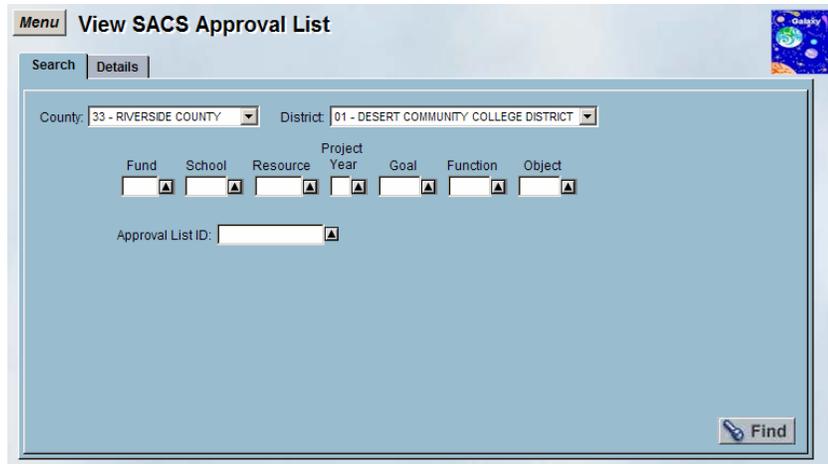
### View SACS Approval List

This screen is used view SACS approval list information.

Step 1  
From menu select  
View SACS  
Approval List  
  
Click **OK**.



Step  
To view SACS  
Approval List  
enter/select desired  
information.  
  
Click **Find**



NOTE: Clicking “Find” without entering or selecting any search criteria will display a list of all SACS Approval Lists on the Details tab.

Step  
View sacs  
approval list(s)  
information.

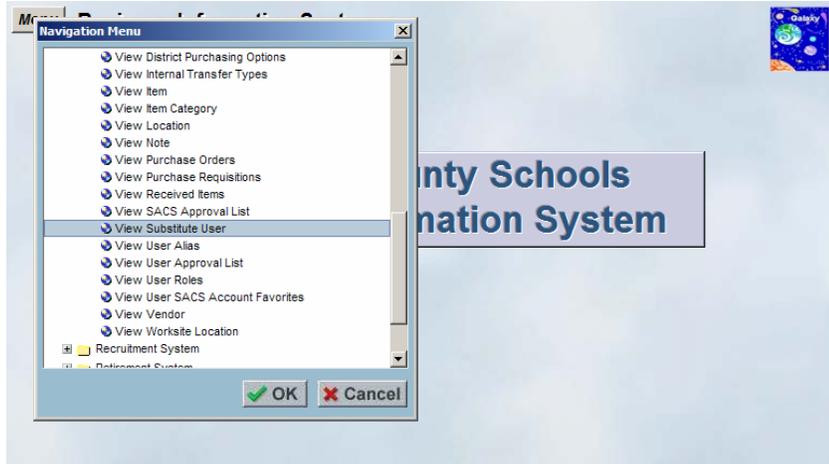


NOTE: Click the print button to print all SACS approval list data to an html file, which is typically displayed by a web browser

### View Substitute User

This screen is used view substitute user information.

Step 1  
From menu select  
View SACS  
Approval List  
  
Click **OK**.



Step  
To view substitute  
user(s) enter/select  
desired information  
  
Click **Find**.



NOTE: Clicking "Find" without entering or selecting any search criteria will display a list of all Substitute User's on the Details tab.

Step  
View substitute  
user(s) information.

User ID	Employee Number	Employee Name	
# 000526	000526		
# 000785	000785		
- 000851	000851	HOUSEWRIGHT, MATTHEW S	
Substitute User ID	Substitute From Date	Substitute To Date	Substitute Name
# 000964	000964		
# 000968	000968		
# 004982	004982		ATTOUN, FRANKLIN Y
# 004992	004992		RICHARDS, LENITA K
# 005076	005076		ORTIZ, REYNALDO F
# 005127	005127		WOODWARD, CECILIA C
# 005166	005166		SNYDER, DORIS E
# 005167	005167		HOUSTON, CHERYL A
# 005232	005232		YALKENBURG, LINDA S
# 014687	014687		JACKSON JR, C D
# 014798	014798		DIAZ JR, MARCELINO
# 014840	014840		PELL, MARY S
# 015340	015340		

NOTE: Click the print button to print all Substitute User data to an html file, which is typically displayed by a web browser

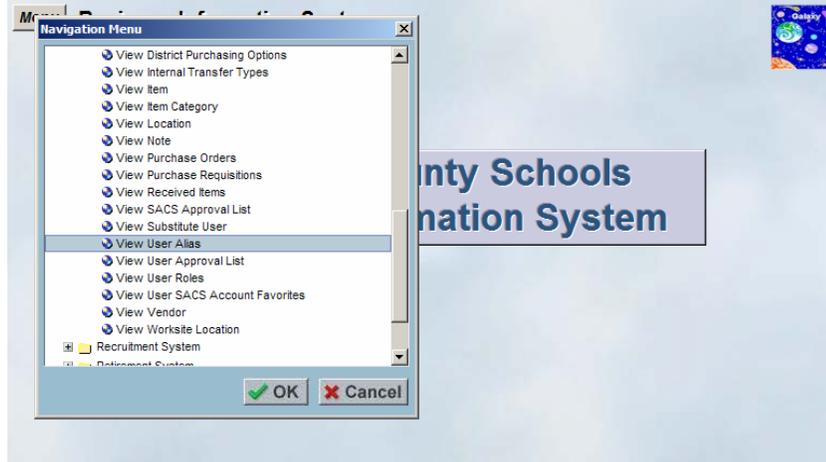
### View User Alias

This screen is used view user alias information.

#### Step 1

From menu select  
View User Alias

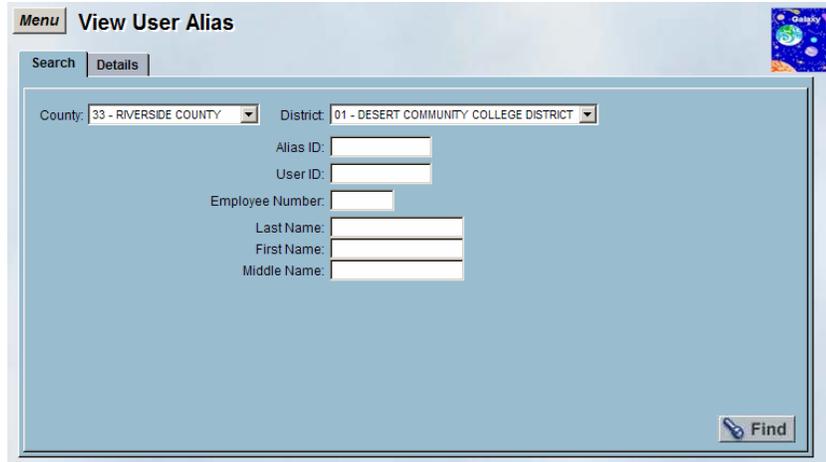
Click **OK**.



#### Step

To view user alias  
enter/select desired  
information

Click **Find**.



**NOTE:** Clicking “Find” without entering or selecting any search criteria will display a list of all User Alias on the Details tab.

Step  
View user alias  
information.

Alias ID	User ID	Employee Number	Employee Name	Alias ID Active?
BUYER	047200	047200	ALM, TERRI L	Y
BUYERS	119122	119122	ANGLE, ADELINA D	Y
SUPERVISOR	005166	005166	SNYDER, DORIS E	Y
SUPERVISOR	047200	047200	ALM, TERRI L	Y

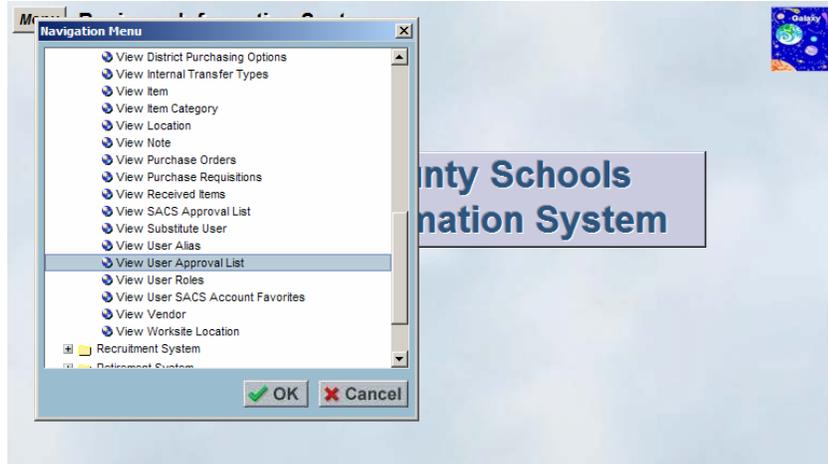
**NOTE:** Click the print button to print all User Alias data to an html file, which is typically displayed by a web browser.

### View User Approval List

This screen is used view user approval list information.

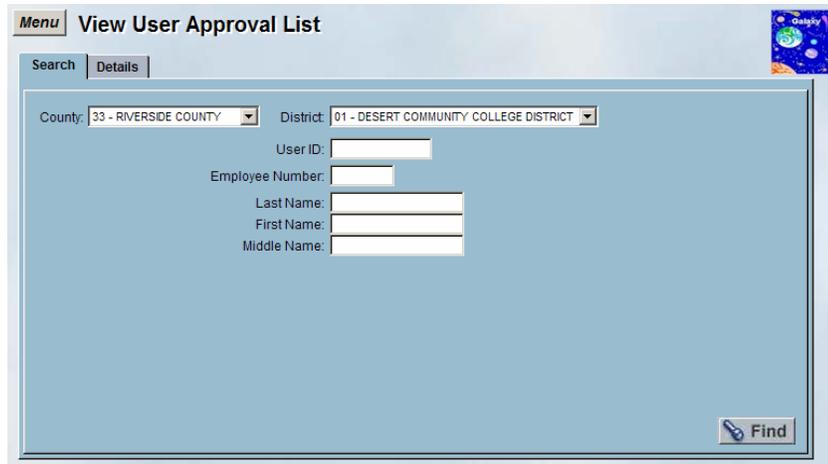
Step 1  
From menu select  
View User Approval  
List

Click **OK**.



Step  
To view user  
approval list(s)  
enter/select desired  
information

Click **Find**.



NOTE: Clicking "Find" without entering or selecting any search criteria will display a list of all users' and their User Approval List(s) on the Details tab.

Step  
View user  
approval list(s)  
information.

Click on the (+) to  
expand the line and  
view approval list(s)  
associated to the user.



**NOTE:** Click the print button to print all User Approval List data to an html file, which is typically displayed by a web browser.

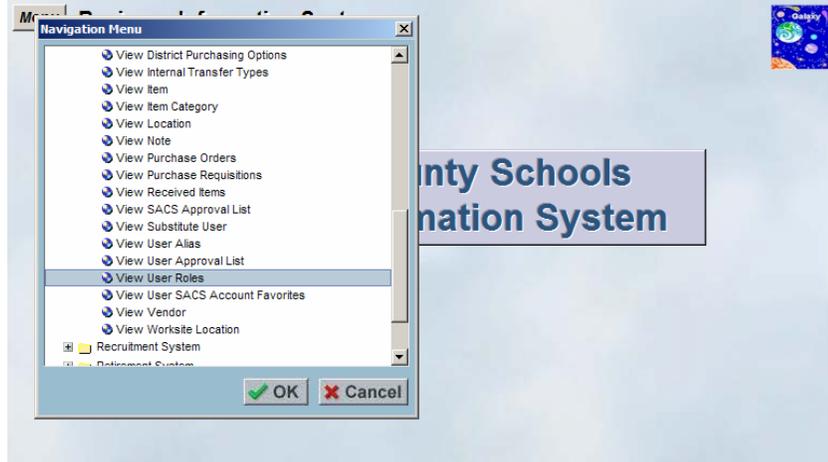
### View User Roles

This screen is used view user roles information.

#### Step 1

From menu select  
View User Roles

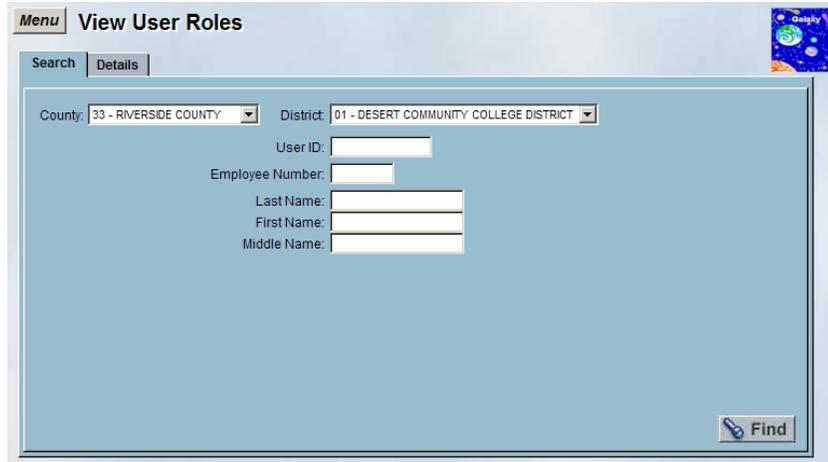
Click **OK**.



#### Step

To view user roles  
enter/select desired  
information

Click **Find**.



**NOTE:** Clicking “Find” without entering or selecting any search criteria will display a list of all users’ and their User Roles on the Details tab.

Step  
View user roles  
information.

Click on the (+) to  
expand the line and  
view roles associated  
to the user.

User ID	Employee Number	Employee Name
000526	000526	
000785	000785	
000851	000851	HOUSEWRIGHT, MATTHEW S
000964	000964	
000968	000968	
004982	004982	ATTOUN, FRANKLIN Y
004992	004992	RICHARDS, LENITA K
005076	005076	ORTIZ, REYNALDO F
005127	005127	WOODWARD, CECILIA C
005166	005166	SNYDER, DORIS E

Role	Phone Number	Fax Number
APPROVER		
005167	005167	HOUSTON, CHERYL A
005232	005232	VALKENBURG, LINDA S
014687	014687	JACKSON JR, C D
014798	014798	DIAZ JR, MARCELINO
014840	014840	PELL, MARY S

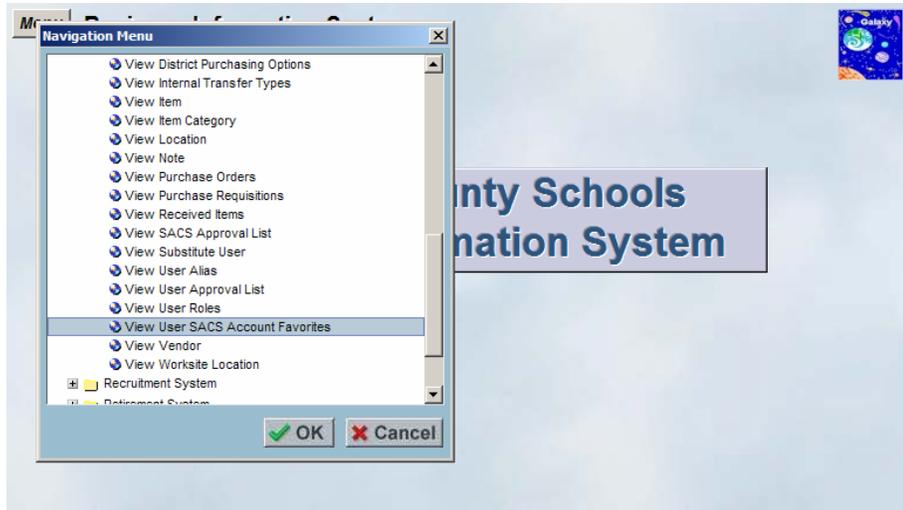
**NOTE:** Click the print button to print all User Roles data to an html file, which is typically displayed by a web browser.

### View User SACS Account Favorites

This screen is used view user SACS account favorites information.

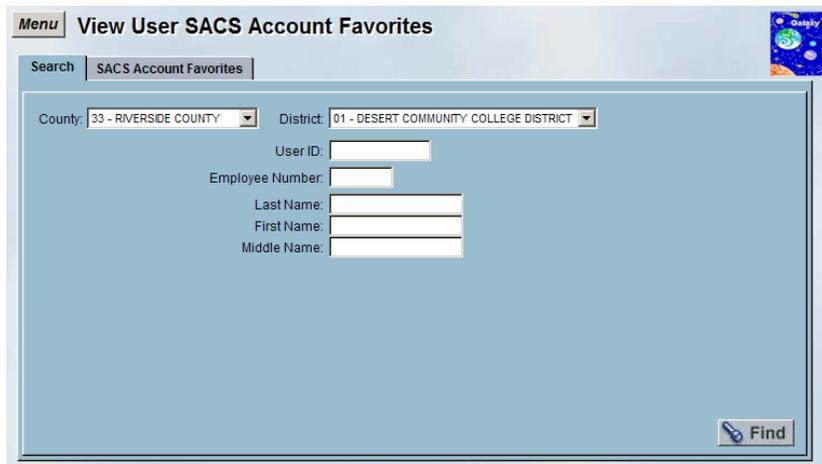
Step 1  
From menu select  
View SACS Account  
Favorites

Click **OK**.



Step  
To view SACS  
Account Favorites  
enter/select desired  
information

Click **Find**.



NOTE: Clicking “Find” without entering or selecting any search criteria will display a list of all users and their SACS Account Favorites on the Details tab.

Step  
View sacs  
approval list(s)  
information.



**NOTE:** Click the print button to print all SACS approval list data to an html file, which is typically displayed by a web browser.

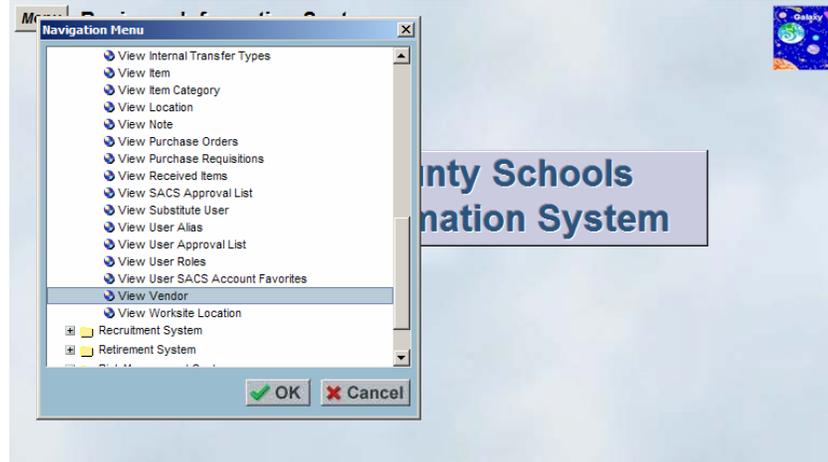
### View Vendor

This screen is used view vendor information.

#### Step 1

From menu select  
View Vendor

Click **OK**.

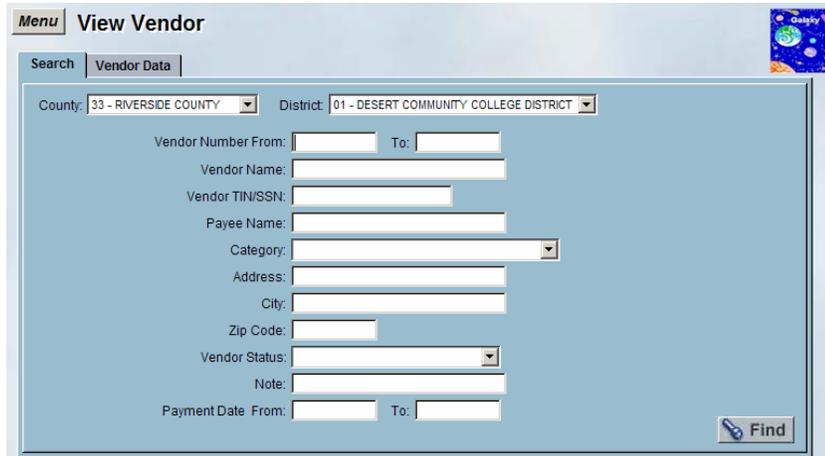


#### Step

To edit an existing  
vendor enter/select  
information as  
available.

Must enter/select  
at least one selection  
from Search criteria.

Click **Find**



Step  
View Vendor Data  
tab and Details sub  
tab.

If there is more  
than one vendor in  
the upper window,  
double click on the  
vendor to display the  
information in the sub  
tabs below.

Click **Addresses**  
sub tab

**Menu View Vendor**

Search Vendor Data

Vendor Number	Vendor Name	Last Payment Date	Total Claim Payments	Vendor Status	Reference Vendor Number
72374	1A TEST OFFICE SUPPLIES			ACTIVE	

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Vendor Number: 72374 Name: 1A TEST OFFICE SUPPLIES

**Details** Addresses Contacts Categories Items Notes Former Names Independent Contractor

Vendor Status: ACTIVE Tax Type: 11 -- REPORTABLE NON-TAXABLE INCOME  
 Reference Vendor: Taxpayer ID Nbr: SSN TIN  
 DBA Vendor Origin: 1 -- USA  
 Payee: Minority Code:  
 Employee Number: Year Established: With Us Since:  
 Terms: Last P. O. Number:  
 Freight On Board:

Update User ID: 126218 Update Timestamp: 09/07/2004 8:40 AM

NOTE: Click the print button to print all Vendor Data to an html  
file, which is typically displayed by a web browser

Step  
View addresses  
associated to the  
vendor.

Click **Contracts**  
sub tab

**Menu View Vendor**

Search Vendor Data

Vendor Number	Vendor Name	Last Payment Date	Total Claim Payments	Vendor Status	Reference Vendor Number
72374	1A TEST OFFICE SUPPLIES			ACTIVE	

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Vendor Number: 72374 Name: 1A TEST OFFICE SUPPLIES

**Details** Addresses Contacts Categories Items Notes Former Names Independent Contractor

Address ID	Address Type	Address Type Description	Address Line 1	Address Line 2
CORPORATE	C	CORPORATE/1099	1234 TEST DRIVE	

Step  
View contacts  
associated to the  
vendor.

Click **Categories**  
sub tab

**Menu View Vendor**

Search Vendor Data

Vendor Number	Vendor Name	Last Payment Date	Total Claim Payments	Vendor Status	Reference Vendor Number
72374	1A TEST OFFICE SUPPLIES			ACTIVE	

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Vendor Number: 72374 Name: 1A TEST OFFICE SUPPLIES

Details Addresses **Contacts** Categories Items Notes Former Names Independent Contractor

P.O. Send Email Address: Website URL:  
Bid Send Email Address:

Contact Type	Contact Type Description	Contact Name	Contact Title	Phone Number	Mobile Number
S	SALES	KIM SALES			
M	MANAGER	MICHELLE MANAGER			

Step  
View categories  
associated to the  
vendor.

Click **Items** sub  
tab

**Menu View Vendor**

Search Vendor Data

Vendor Number	Vendor Name	Last Payment Date	Total Claim Payments	Vendor Status	Reference Vendor Number
72374	1A TEST OFFICE SUPPLIES			ACTIVE	

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Vendor Number: 72374 Name: 1A TEST OFFICE SUPPLIES

Details Addresses Contacts **Categories** Items Notes Former Names Independent Contractor

Category Name	Category Description	Buyer User ID	Buyer Name
---------------	----------------------	---------------	------------

Step  
View items  
associated to the  
vendor.

Click **Notes** sub  
tab

**Menu View Vendor**

Search Vendor Data

Vendor Number	Vendor Name	Last Payment Date	Total Claim Payments	Vendor Status	Reference Vendor Number
72374	1A TEST OFFICE SUPPLIES			ACTIVE	

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Vendor Number: 72374 Name: 1A TEST OFFICE SUPPLIES

Details Addresses Contacts Categories **Items** Notes Former Names Independent Contractor

Item Name	Description	Catalog Number	Vendor Unit Price	Item Catalog Unit Price	Unit of Measurement	Item Active?
-----------	-------------	----------------	-------------------	-------------------------	---------------------	--------------

Step  
View notes  
associated to the  
vendor.

Click **Former  
Names** sub tab

**Menu View Vendor**

Search Vendor Data

Vendor Number	Vendor Name	Last Payment Date	Total Claim Payments	Vendor Status	Reference Vendor Number
72374	1A TEST OFFICE SUPPLIES			ACTIVE	

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Vendor Number: 72374 Name: 1A TEST OFFICE SUPPLIES

Details Addresses Contacts Categories Items Notes **Former Names** Independent Contractor

Internal

Step  
View former  
names associated to  
the vendor.

Click  
**Independent  
Contractor** sub tab

**Menu View Vendor**

Search Vendor Data

Vendor Number	Vendor Name	Last Payment Date	Total Claim Payments	Vendor Status	Reference Vendor Number
72374	1A TEST OFFICE SUPPLIES			ACTIVE	

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Vendor Number: 72374 Name: 1A TEST OFFICE SUPPLIES

Details Addresses Contacts Categories Items Notes Former Names **Independent Contractor**

Date Changed	Vendor's Former Name	Payee's Former Name	User ID
09/07/2004 8:40:05 AM	1 TEST OFFICE SUPPLIES		126218

Step  
View independent  
contractor  
information for the  
vendor.

**Menu View Vendor**

Search Vendor Data

Vendor Number	Vendor Name	Last Payment Date	Total Claim Payments	Vendor Status	Reference Vendor Number
72374	1A TEST OFFICE SUPPLIES			ACTIVE	

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Vendor Number: 72374 Name: 1A TEST OFFICE SUPPLIES

Details Addresses Contacts Categories Items Notes Former Names **Independent Contractor**

Independent Contractor SSN: \_\_\_\_\_

Calendar Year	Encumbrance Total	Direct Payment Total	Reported Date
2001	0.00	0.00	
2001	28,408.00	0.00	10/15/2001
2001	64.50	0.00	
2001	0.00	0.00	
2001	169,240.00	0.00	11/15/2001
2001	0.00	0.00	
2001	0.00	0.00	

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ M.I. \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

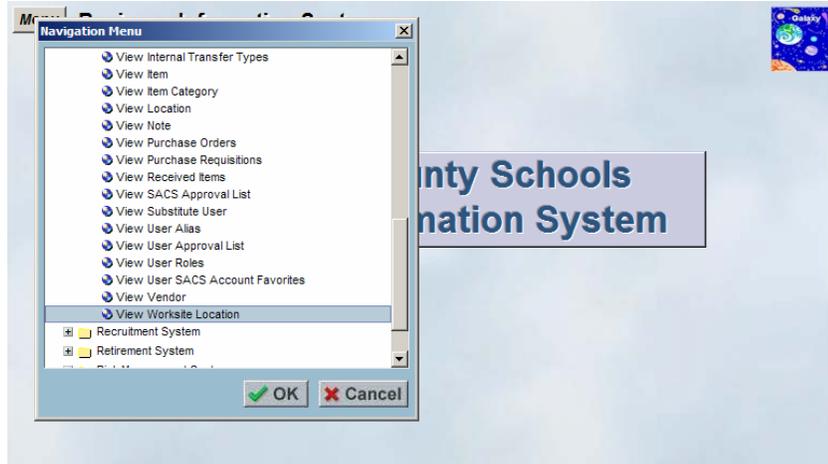
Zip Code \_\_\_\_\_ Zip Code Ext. \_\_\_\_\_ Created Date \_\_\_\_\_ Deleted Date \_\_\_\_\_ Update Timestamp \_\_\_\_\_

### View Worksite Location

This screen is used view worksite location information.

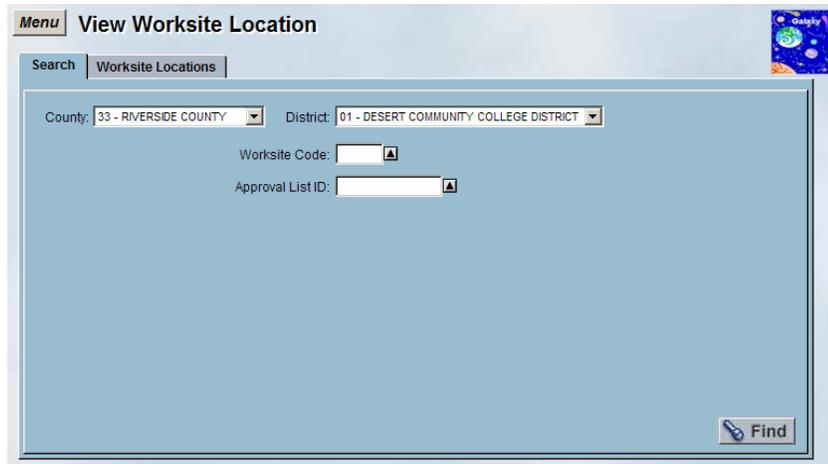
Step 1  
From menu select  
View Worksite  
Location

Click **OK**.



Step  
To view worksite  
locations enter/select  
desired information

Click **Find**.



NOTE: Clicking "Find" without entering or selecting any search criteria will display a list of all Worksite Locations on the Worksite Locations tab.

Step  
View worksite  
locations information.



Worksite Code	Description	Address	City	State	Zip Code	App
100	SUPERINTENDENT/PRESI					
101	BOARD OF TRUSTEES					
102	INFORMATION SYSTEMS					
104	FOUNDATION					
105	PUBLIC INFORMATION					
107	PERSONNEL					
108	ACADEMIC SENATE					
174	TEACHING LEARNING CE					
200	CHIEF BUSINESS OFFIC					
205	ADMINISTRATIVE SUPPO					
210	BUSINESS SERVICES					
215	MAINTENANCE & OPERAT					
218	REPRODUCTION/COPY CE					
220	WAREHOUSE & STORES					
224	CSEA					
225	CTA					
200	ALUMNUS					

**NOTE:** Click the print button to print all Worksite Locations data to an html file, which is typically displayed by a web browser