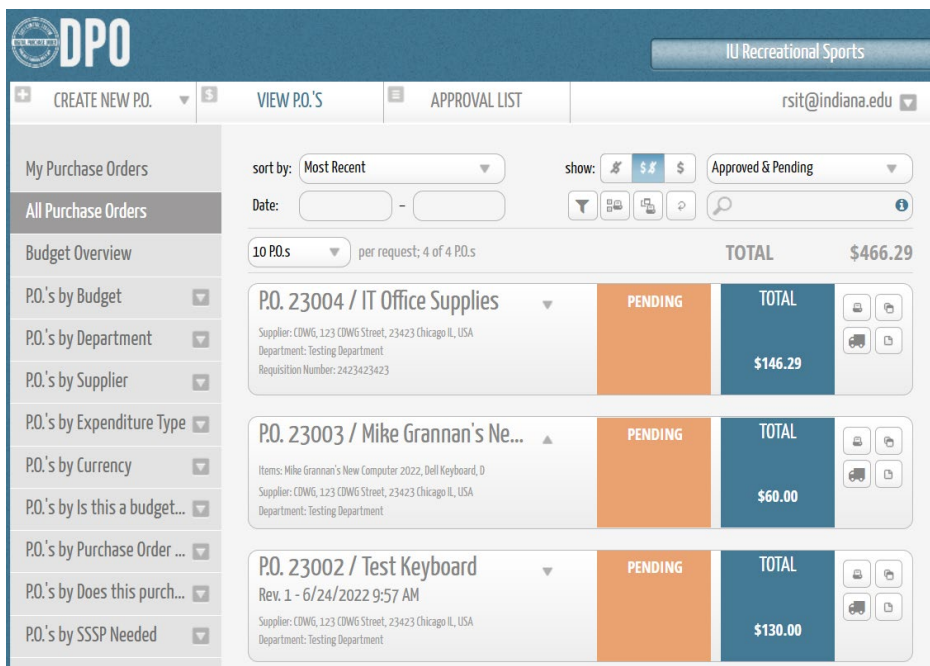


How to View Submitted PORs

Viewing PORs is easy to find since this is the landing page you start one when logging into the POR system. If you ever need to get back to viewing PORs just click the **VIEW P.O.'S** tab at the top of the screen. You will see a list of PORs as well as many options to adjust your view to find the POR you are seeking. This page will walk you through the features of this page.

You will only be able to see the PORs that you have permission to see. The permissions structure is set that you will be able to see PORs for the unit departments you have been added to as part of role in the organization.

Default landing page view



The screenshot displays the DPO interface for IU Recreational Sports. The user is logged in as rsit@indiana.edu. The main navigation includes 'CREATE NEW P.O.', 'VIEW P.O.'S', and 'APPROVAL LIST'. The 'VIEW P.O.'S' section shows a list of pending purchase orders with the following details:

PO Number / Description	Status	Total Amount
P.O. 23004 / IT Office Supplies Supplier: CDWG, 123 CDWG Street, 23423 Chicago IL, USA Department: Testing Department Requisition Number: 2423423423	PENDING	\$146.29
P.O. 23003 / Mike Grannan's Ne... Items: Mike Grannan's New Computer 2022, Dell Keyboard, D Supplier: CDWG, 123 CDWG Street, 23423 Chicago IL, USA Department: Testing Department	PENDING	\$60.00
P.O. 23002 / Test Keyboard Rev. 1 - 6/24/2022 9:57 AM Supplier: CDWG, 123 CDWG Street, 23423 Chicago IL, USA Department: Testing Department	PENDING	\$130.00

The interface also shows a summary of 10 pending purchase orders with a total value of \$466.29. The left sidebar contains various filters for viewing purchase orders, such as 'My Purchase Orders', 'All Purchase Orders', 'Budget Overview', and filters by budget, department, supplier, expenditure type, currency, and SSSP status.

View P.O.'S General Overview

This default landing page gives you a simple way to view PORs that are pending or approved and not yet closed. Below we will go into far greater detail about how to manipulate this view but let's start off with the basics.

When in doubt you can always refresh this page at the top of your browser to make sure it is up to date with the most current PORs and status's

This view shows you a list of submitted PORs. To open a POR and look at its detail, simply click the POR box you want to look at (click anywhere in the red rectangle shown below). This will open the POR and show you all of its details.

The screenshot shows a web interface for managing purchase orders. At the top, there are navigation tabs: 'CREATE NEW P.O.', 'VIEW P.O.'S', and 'APPROVAL LIST'. The user is logged in as 'rsit@indiana.edu'. Below the navigation, there are filters for 'sort by: Most Recent', 'show: \$ \$ \$', and 'Approved & Pending'. A date filter is set to '6/1/2022'. The interface displays a table of purchase orders with columns for 'P.O. ID', 'Status', and 'TOTAL'. A red rectangle highlights the first entry: 'P.O. 23005 / Network Cables - 1...' with a status of 'PENDING' and a total of '\$100.00'. Below the title, there is a dropdown arrow and a list of items: 'Items: Network Cables - 10ft Restock, Tripp Lite Network Cable - 10ft'. The supplier information is 'Supplier: CDWG, 123 CDWG Street, 23423 Chicago IL, USA', the department is 'Testing Department', and the requisition number is '234234234'.

This doesn't give you much information about the POR but you can click the little arrow to the right of the POR title. This will drop down the item names of the first few items on the POR. You will most likely only see the first two items depending on how long your item names are.

This is a close-up view of the purchase order entry highlighted in the previous screenshot. The title is 'P.O. 23005 / Network Cables - 1...' with a small upward-pointing arrow to its right. A red rectangle highlights a dropdown menu that has been opened, showing the following items: 'Items: Network Cables - 10ft Restock, Tripp Lite Network Cable - 10ft'. Below the items, the supplier information is 'Supplier: CDWG, 123 CDWG Street, 23423 Chicago IL, USA', the department is 'Testing Department', and the requisition number is '234234234'. The status is 'PENDING' and the total is '\$100.00'. There are also icons for printing, saving, and deleting the entry.

Opened POR detail view

You'll see all of the details of the POR entered during the creation phase as well as vendor information.

PURCHASE ORDER NO. 23005

Not approved yet by Caldwell, J.
Not approved yet by Caldwell, J.
Not approved yet by Caldwell, J.

ordered by Team, R.
created on June 28, 2022

PENDING

IJ Recreational Sports
Net Total: \$100.00
Testing Department

CDWG
123 CDWG Street, 23423 Chicago, IL
USA
Email: purchase@cdwg.com
Phone: 233-233-2343
Additional information: This is an additional field for data

1 × Network Cables - 10ft restock for \$0.00 per Item	TOTAL
Ship To: SRSC	\$0.00
Purchase	No account code yet
Budget »TEST - BUDGET«	

10 × Tripp Lite Network Cable - 10ft for \$10.00 per Item	TOTAL
Description: Tripp Lite Network Cable - 10 ft - purples	\$100.00
Purchase	No account code yet
Budget »TEST - BUDGET«	

TOTAL \$100.00

Purchase Order Request Details:

<u>Is this a budgeted purchase:</u>	Yes
<u>Requisition Number:</u>	234234234
<u>Date Needed By:</u>	Aug 31, 2022
<u>Purchase Order Request Category:</u>	Consumable
<u>Unit Custom Purchase Order Request Category:</u>	IT - networking
<u>Does this purchase order request have a warranty(ies) included:</u>	No

If you click the **down arrow** close to the **TOTAL** for the item this will expand the item details. You'll see that the POR item details are shown and the arrow has changed to an up arrow. Click the up arrow to close the item detail.

10 × Tripp Lite Network Cable - 10ft for \$10.00 per Item

Description: Tripp Lite Network Cable - 10 ft - purples

Part #23432343

Purchase through: CDWG

Ship To: SRSC

Purchase

No account code yet

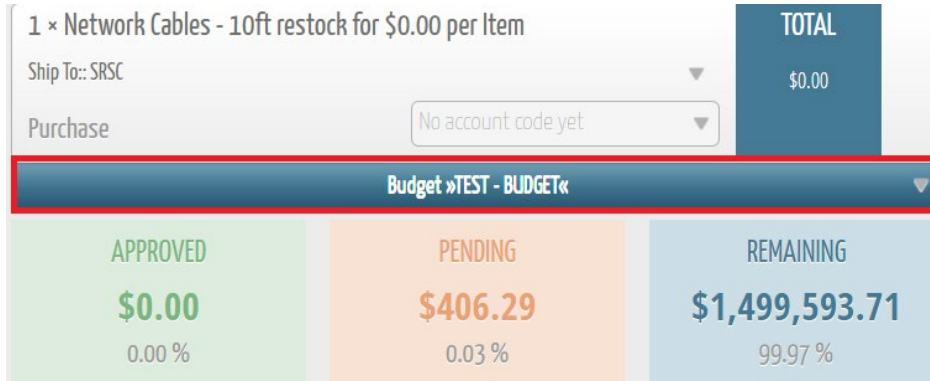
TOTAL

\$100.00

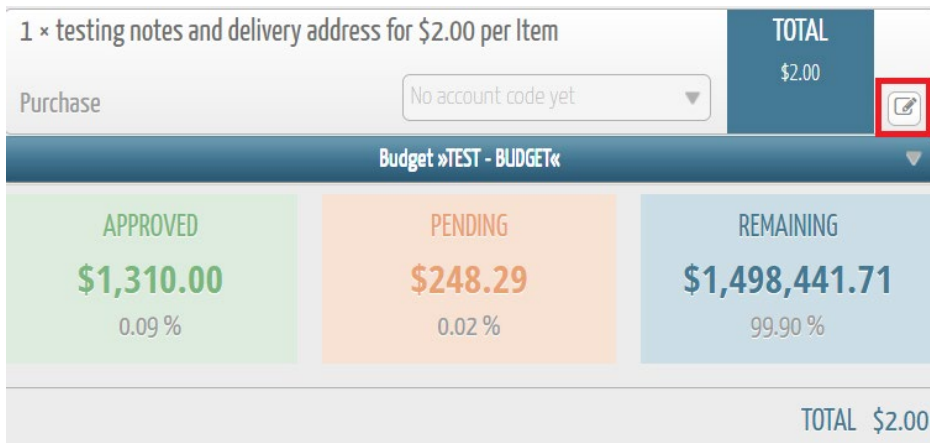
Budget »TEST - BUDGET«

If you click the blue budget bar you'll be able to see details of how much has been "Approved" and spent on this budget, how much is "Pending" to be spent, and how much is "Remaining" in the budget.

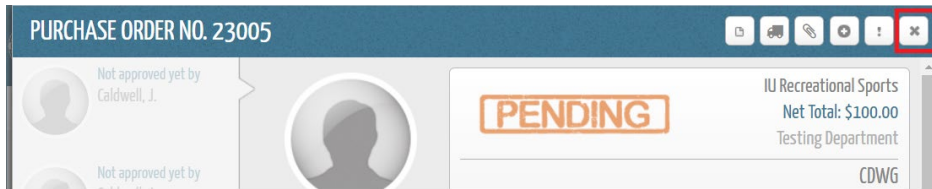
- **Note:** these budget values may not 100% reflect your actual budget lines. These budget lines are a tool to help guide but all actual transactions will still be tracked in your statement spreadsheets.



If you need to change the budget line assigned after submission, just amend the POR and then click the Pencil icon to "Change budget for this item".

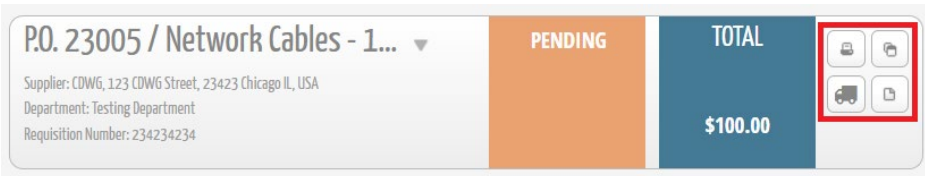


To close the POR detail view click the **X** in the top right. You'll notice in the top right there are many other POR related icons. We will go over these other features of the POR detail screen in further training.



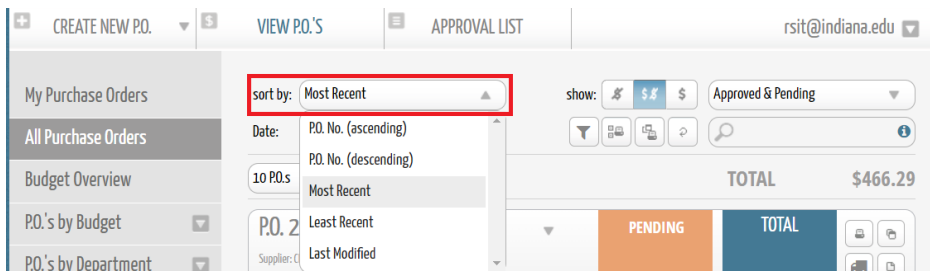
Back to the main VIEW P.O.'S screen

Another grouping of icons to review are at the end of each POR listing. These icons serve a couple of useful purposes and a couple not so useful purposes. The top left icon of the printer is related to **batch printing** and **can be ignored**. The top right icon allows you to create a new POR based on this POR. This is handy for **copying a POR** without having to enter all of the information again. The bottom left icon with the Delivery Truck is for documenting **Deliveries**. This will be covered on another page here. The bottom right icon is for **opening the POR as a PDF**. This isn't very useful for our needs.

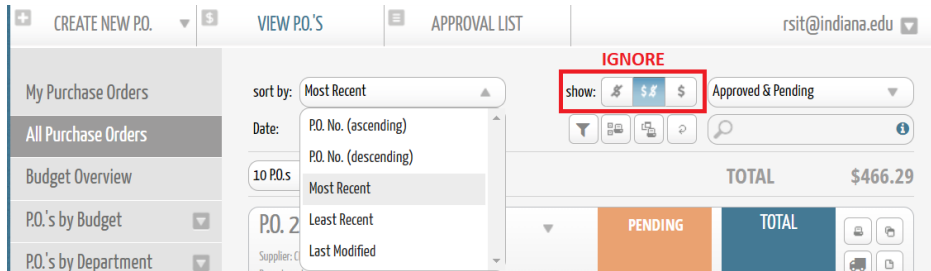


View P.O.'S Detailed Page Overview

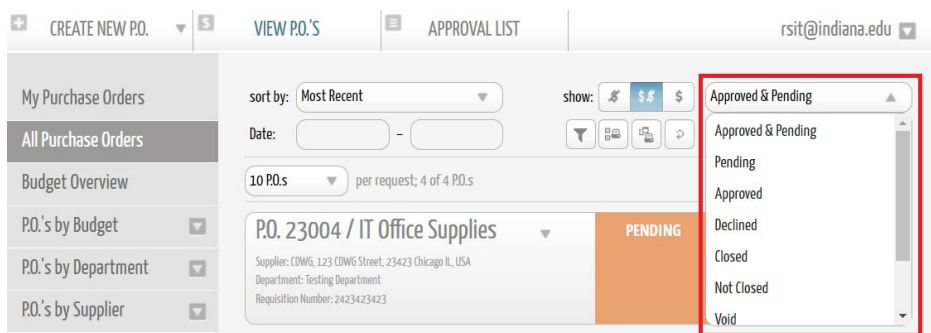
At the top you'll see **sort by: Most Recent**. This is the default view for the POR system. You can click this drop down to change the sorting of the PORs in the view.



Straight across to the right from the **sort by:** dropdown you'll see **show:** with some \$ signs. These selectors are for invoicing and can be ignored.



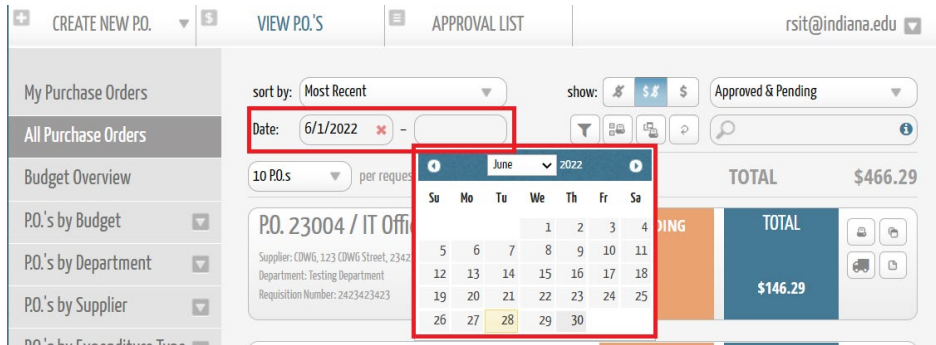
Next to the **show:** icons you'll see a status selector that defaults to "**Approved and Pending**". This selector is showing you only PORs that are approved or in pending status to be approved. If you click this drop down you will see other status options that are available to change the view of the PORs.



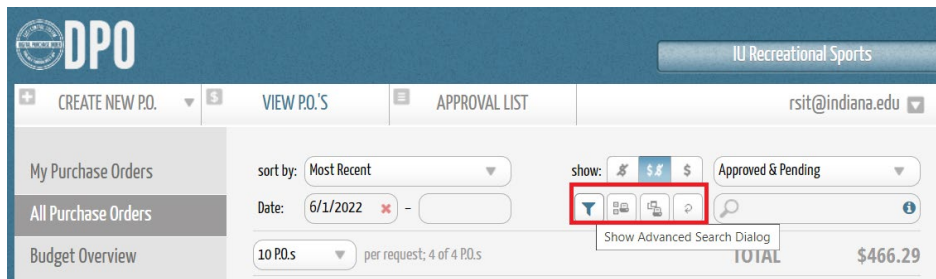
Status descriptions:

- **Approved & Pending** - PORs that have been approved and ones that are pending to be approved
- **Pending** - Just PORs that haven't been approved yet
- **Approved** - Just PORs that have been approved
- **Declined** - Just PORs that have been declined by your unit supervisor
- **Closed** - Just PORs that have been approved, purchased, and fully delivered - Only Financial Affairs can close a POR once they know it has been fully received
- **Not Closed** - Just PORs that have not be closed yet
- **Void** - Just PORs that have been voided (the POR system will not delete a POR is can just be placed in Void status so that the record exists but it doesn't take effect on any budget lines or reporting)
- **Amended** - Just PORs that have been edited after submission
- **All** - All PORs that you are able to see with your permissions

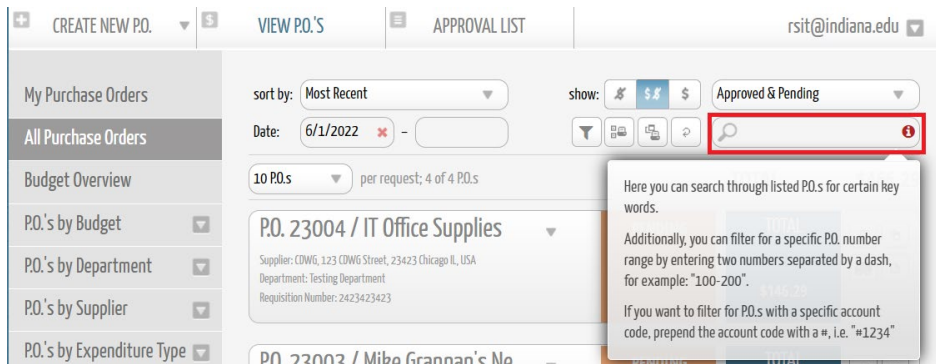
Moving back to the top left under **sort by**: you'll see a **Date** range field set. You can use this date range to limit your view of PORs based on a set of dates.



To the right of the **Date** range field set you'll see a set of four icons. The first funnel icon is the **Advanced Search** button which we will detail below. The next two buttons with printer icons are for **batch printing** which we don't use. The last button is a **refresh list** button.



Next to the **Advanced Search** and **batch print** buttons is a **Search Box**. If you hover over the "i" icon it gives you detail on how you can search for a specific POR. Normal keyword search as well as more specific P.O. number searching is available.



Last but not least is the drop down for limiting the amount of **PORs** that are shown on the screen. This drop down will let you select how many PORs are shown at a time.

The screenshot shows a web interface for managing purchase orders. At the top, there are navigation tabs: 'CREATE NEW P.O.', 'VIEW P.O.'S', and 'APPROVAL LIST'. The user's email 'rsit@indiana.edu' is visible in the top right. On the left, a sidebar contains menu items: 'My Purchase Orders', 'All Purchase Orders', 'Budget Overview', 'P.O.'s by Budget', 'P.O.'s by Department', 'P.O.'s by Supplier', and 'P.O.'s by Expenditure Type'. The main area features a search and filter section with 'sort by: Most Recent', 'show: Approved & Pending', and a date filter set to '6/1/2022'. A dropdown menu is open, showing options for the number of purchase orders to display: '10 P.O.s', '25 P.O.s', '50 P.O.s', '100 P.O.s', and '500 P.O.s'. The '10 P.O.s' option is highlighted. Below the dropdown, a table lists purchase orders. The first entry is 'Network Cables - 1...' with a status of 'PENDING' and a total value of '\$100.00'. The overall total for the list is '\$566.29'.

Item	Status	TOTAL
Network Cables - 1...	PENDING	\$100.00
TOTAL		\$566.29