PASS Buyer

Training Essentials Package

Contains Guided Practices and Individual Exercises used during your training class

Please print this document and bring it to PASS Buyer training





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Guided Practice 2.1 - Log-In to PASS

1. Click the Internet Explorer icon on the desktop. The Internet Explorer main screen appears.



2. Type the PASS training website address in the address textbox. The training web address is:

http://asmpw01.dc.gov:3377/Ariba



Note: Web site addresses are case sensitive. The training web address IS NOT the same as the production (the real system you will use when you receive your login and password).



Tip: You can mark the real website address as a Favorite, creating a short cut.



3. Type your user name and password in the User Name and Password fields from the Data Sheet.

You are logged into PASS.



Note: Your user name is typically the same as your District login name.

| Buyer | Walcome to PASS | | 20 |
|-------|--|------|---------|
| | | Help | Trektor |
| | System is running in Development mode. Do not use for Production activity. | | |
| | | | |
| | the second | | |
| | | | |
| | Pessword | | |
| | Login | | |
| | E | | |
| | 10/ P- 2 | | |
| | | | |
| | | | |

4. Review the elements of the PASS Home page.







Guided Practice 3.1 - Create a Requisition with Catalog Items

1. Complete the Requisition Preparation Sheet.

2. Log in as the Requestor according to your data sheet.



3. Click Create on the PASS Swoosh screen.

The Create a New Request screen appears. You can also initiate the requisition process by clicking Requisition under the Create section of the Process Step Area.





4. Click Requisition on the Create a New Request screen.

The Add Title screen appears. From here, you will provide general descriptive information for the requisition.

| Buyer * | Welcome Annette | Tibbs last visit | 4/17/2003 1:05 PM | | | | * * * |
|---------------|--|---|---|--|---|--|------------------------------|
| | Home | Logout | Preferences | Toggle Tips | Toggle Currency | Help | |
| Requisition | Add Titl | e | | | | Next> Summar | r Exit |
| O Title ✓ | Requisition PRS24 Untitled Requisition | | | | | Requisition Items: 0 Total | : \$0.00USD |
| Accounting | Enter a title fo on behalf of s dick Next to | r your requisiti smeone else, ti add iteme. | on. You can change the accounting, shippi | one or more of the old ng, and delivery infor | ver requisition Fields, if d mation applies to that pe | named. If you create the rson, When you finish ad | requisition ding a title, |
| G Samments | Title - Requisitio | n | | | | | |
| Approval Flow | Title: | Untitled Reg | uisition | | | | |
| Summary. | Preparer's Agency: | CRD (DEPT.) | OF CONSUMER AND I | REGULATORY AFFAIRS | 5) | | |
| | On Dehalf Of: | Annette Tibl | bs 💌 💷 | | | | |
| | Hold Until: | | 101 | | | | |
| | P]F∉: | | | | | | |
| | Funds Status: | No Funds Co | mmitted | | | | |
| | | | | | | Hext > Summar | y Evit |

- 5. Write down the requisition number located at the top left of the Add Title screen.
- 6. Type "[Your Name]- Catalog Requisition" in the Title field on the Add Title screen.

An example of the typed text is "Joe Smith- Catalog Requisition".



7. Click Next to proceed to the Add Items screen.

Notice that the Requisition # and the Requisition's Title continue to appear in the top left corner. Notice that the Catalog Hierarchy is in alphabetical order.

| Buyer " | Welcome Annette Tibbs last visit 4/17/2003 4:57 PM | · · · · · |
|-----------------------------------|--|---|
| | Home Logoul Preferences Toggi | e Tips Toggle Gurrency Help |
| Requisition | 2 Add Items | A Prev Heart & Summary Exit |
| O <u>Title</u> ✓ ② Add Items ✓ | Requisition PR526 Test | Table Requisition Eterns: 0 Total: \$0.00USD |
| 3 Accounting Shipping | Add items to your requisition. You can add items from the cat When you finish adding items, click Newt to go to the next st | talog or from your favorites list, or enter details for non-catalog items. op in the process or Summary to review your request. |
| Comments Approval Flow | Search @Entire catalog Co | erant category <u>Advanced</u> |
| C automaty | Catalog Home | |
| | Consulting Services Administrative Consulting Business Consulting Computer Hardware Consulting | Computer Accessories and Supplies Compact Disks, EVD., RON., etc.,. |
| | Educational Services Course Development Services, Instructional / Training | Radie Communication, Telephone and Telecommunications Equipment, Accessories and Supplies Integrated Communications Systems |

8. Click on the Category and subcategory listed on your Data Sheet.

The Add Items screen refreshes to display only categories or items under the subcategory selected. A list of available products under this category appears.

- 9. Click Add to the right of the product listing on your Data Sheet. The View Line Items screen appears. Notice that a quantity is defaulted to 1 and is added to your shopping cart.
- 10. Change the quantity from one to 20.



11. Click Next to proceed to the Add Accounting Details screen.

The Add Accounting Details screen appears. From this screen, you will identify the correct accounting information so that the funds to pay for the purchase order will be pulled from the correct budget. Comptroller Object should be pre-filled (based on the commodity codes). You need to enter the correct Agency Object and Index No.; the remaining fields should default based on the two selections. If this information is not provided, you will receive an error message when you try to submit the requisition.



12. Click Edit to modify the default information.

The Edit Line Item Accounting screen appears. Notice that certain fields can now be changed. You must Click Edit to modify the accounting fields, which is done by line item.

13. Click 🖬 to the right of the Agency Obj field to access a list of available Agency Objects for the agency.

The Choose Value for Agency Obj screen appears. The Choose Value for screen is a general screen used any time a field has multiple values from which to choose.





Note: You can view details of any data in a field or a column that appears with a hypertext link. For example, the Comptroller Object field has a link for the Comptroller Object data. If you click the link for this data, you will see detailed information on the Review Details for Comptroller Object screen, including effective beginning and ending dates. Once you review the information, click Done to return to the previous screen.

- 14. Click Select to the Agency Obj listed on your data sheet.
- 15. The Edit Line Items Accounting screen re-appears with the updated Agency Obj information.
- 16. Click 🗉 to the right of the Index No field to access a list of available Index numbers. The Choose Value for Index No screen appears.
- 17. Click Select to the right of the Index No. listed on your data sheet.

The Edit Line Item Accounting re-appears. The Index number and other required accounting codes appear.

18. Click OK at the bottom right corner of the Edit Line Item Accounting screen to accept the change.

The Add Accounting Details screen re-appears with the updated accounting information.



19. Click Next to proceed to the Add Shipping Details screen.

The Add Shipping Details screen appears. Notice that you can enter shipping information for the entire requisition (Header level) or by line item.

| Buyer" | Welcome Annette Tibbs Tast visit 4/18/2003 3:19 PM |
|--|---|
| | Home Logost Preferences Toggie Tips Toggle Currency Halp |
| Requisition | 4 Add Shipping Details |
| 1 Ille Add Rems | Pequisition PR526 Test Requisition James 1 Total: \$27.84USD |
| Accounting | Enter shipping information for the entire request. |
| d Shipping | |
| G Commenta G Approval Flow Summary | Shipping - Entire Requisition Ship To: DEPT. OF CONSUMER AND REGULATORY ATTAIRS IN TO: Deliver To: Immediate Thick: Need-by Date: Immediate Thick: Immediate Expand Shipping - by Line Item to enter different shipping details for each line item. |

| Correction C | If the ax veschador Off Onit Price Diskettes (8.5" formatted/ 10 per box) 2 each \$13.92USD Ship To: DEPT. OF CONSUMER AND REGULATORY AFFAIRS Deliver To: Annette Tibbs Need-by Date: | Items in this req | uest: 1 | Dit. | Itert | Deter |
|---|---|-------------------------|---|------|-------|------------|
| Ship To: DEFT. OF CONSUMER AND REGULATORY AFFAIRS Deliver To: Annette Tibbs Need-by Date: | Ship To: DEPTL OF CONSUMER AND REGULATORY AFFAIRS Deliver To: Annette Tibbs Need-by Date: | 1 | Diskettes (0.5" formatted/ 10 per box) | 2 | each | \$13.92USD |
| Need-by Date: | Need-by Date: | Ship To: Deliver To: | DEPT. OF CONSUMER AND RECULATORY AFFAIRS Anoette Tibbs | | | |
| | | Need-by Date: | | | | |
| | | | | | | |
| < Prex Hext> Summ | | | | Pres | Next | > Bumn |



Note: Most PASS users will be limited to selecting agency-

based addresses.



- 20. To edit shipping by line item, you need to click Edit below the line item on the screen.
- 21. Click Next to proceed to the Add Comments screen.

The Add Comments screen appears. From this screen, you can add comments and/or document attachments to the requisition.

| Requisition | | 6 Add Comments | < Prez | Next > 0 | ammary 1 | sit: |
|--|---------|---|---------------|-----------------------------|-----------------------|------|
| Tite Add Items Accounting Shipping | * * * * | Requisition PR526 Test | omments, F de | Requisi Items: 1 ared | ion Total: \$27.84 | USD |
| G Comments | ~ | Comments - Entire Requisition | | | | |
| Approval Flow | * | Comments: | | | | |
| | | Dems in this request: 1 | Otv | Unit P | rice Amer | unt |
| | | 1 III Diskettes (3.5" formetted/10 per box) Add Comment | Z | soch \$13.92 | USD \$27.04U | SD |

22. Type in the Comments textbox on the Add Comments screen.

If you are ordering on behalf of several people, you can use the Comments textbox to indicate the individuals, as well as which items on the requisition were ordered for each individual. You can also do this by adding comments to each line item.



Note: You can include comments/attachments on

purchase orders (permitting the supplier to read them) or you can keep comments internal.



23. Click Next to proceed to the Approval Flow screen.

The Approval Flow screen appears. This screen displays the preconfigured approval flow for this requisition. You cannot modify or delete the existing Approvers; however, you can add Approvers as needed. Document the approval flow on your data sheet. You will use this information in subsequent modules.

| Requisition | | 6 Approval Flow |
|--------------------------------------|--------|---|
| 1 <u>Title</u> 2 <u>Add Items</u> | ~ ~ | Requisition PR526 Test Requisition Items: 1 Total: \$27.84USD |
| 3 <u>Accounting</u> | ~ ~ | The approval flow diagram shows who needs to approve your request. You can add approvers or delete them from your request. |
| 5 Comments | ~ | Approval Flow - Requisition |
| 6 Approval Flow | ~ | Legend: 📓 Pending 🖃 Active 📝 Approved 📕 Denied 💥 Optional |
| Summary | ~ | $PRS26 \ \fbox{\ } \longrightarrow \ \fbox{\ } \underbrace{Funds Check} \longrightarrow \ \fbox{\ } \underbrace{E. Savannah Little} \longrightarrow \ \fbox{\ } \underbrace{CR0 IT Buyer} \longrightarrow \ \fbox{\ } \bigwedge \ Approved$ |
| | | Add Approver |
| | | < Prev Next > Summary Exit |



24. Click Next to proceed to the Summary screen.

The Summary screen appears. From this screen you can review the entire requisition before submitting it.

| Buyer* | Welcome Arnette Tbbs last visit 4/21/2003 12:07 PM | |
|--------------|---|---|
| | Home Lógout Preforences Toggle Tips Toggle Currency Help | |
| Requisition | Summary | |
| O Titin * | Requisition PR526 Test Requisition Items: 1 Total: \$27,84050 | D |
| Accounting × | This is a summary of your current requisition. Review the information to be sure it is correct. You can go back to any previous step to change the information. When you are finished, dick Submit to submit the request for approval. | |
| Comments | Form Approval Flow | |
| summary 🗸 | Tkle: ICGS Preparent's Agency: CRD (DEPT. OF CONSUMER AND REGULATORY AFFAIRS) On Behalf Of: Annette Table 💌 🖬 Hold Unbli ICO PIF#: ICO Funds Status: No Punds Committed | |

| No. Type SR Description | <u>Otr</u> | Unit | Price | Amount | Action |
|--|------------------------------------|-----------|------------|-----------------------|--------------------|
| 1 🔟 Diskettes (3.5" formatted/ 10 per box) | 2 | each | \$13.92050 | \$27.84050 | Edit |
| Supplier: <u>GARDINER, KAMYA-ASSOCIATES, PC</u> LSDBE: Contact <u>GARDINER, KAMYA-ASSOCIATES, PC</u> Commodity Code: <u>2073000/Compect Disk</u> , DVD, RON | Diskettes (3.5° formatted) etr. | '10 per b | ov) | | |
| Contract Number: PODS-2002-C-910-23 | | | | | |
| Contract number: PODS-2002-C-9L0-23 | | | 1 | | |
| Contract Number: PODS-2002-C-910-20 | | | Tate | el Cost: \$2 | 7.64US |
| - Delete Copy | | | Tat | el Cost \$2 Updet | 7.84US e Total |
| - Delete Copy | | | Tata | el Cost \$2 Updat | 7.84US e Total |
| Delete Copy Shipping - Entire Requisition | | | Tata | el Cost: \$2 Updet | 7.64USC e Total |
| Contract Number: PODS-2002-C-910-23 | FFAIRS 💌 🖽 | | Tata | el Cost \$2 Updet | 7.64USI e Total |
| Delate Copy Shipping - Entire Requisition ihip To: DEPT. OF CONSUMER AND REGULATORY Deliver To: Annette Tibbs | FFAIRS 💌 🗖 | | Tata | el Cost \$2 Updet | 7.64US e Total |

Note: To reduce the number of screens on which you work and wait time for refreshing screens, you can work directly from the Summary screen to prepare most of your requisition if it is straightforward. To do so, once you have initiated the requisition, click Summary in the Process Step Area to access the Summary screen.



25. Click Submit to proceed to the New Requisition – Submitted screen.

Your requisition is submitted and the New Requisition – Submitted screen appears.



26. Log out of PASS.

You are now logged out of PASS.



Individual Exercise 3.1 - Create a Catalog Requisition

Objective(s): Submit a requisition with catalog items.

Duration : 20 minutes

Instructions: Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

| Step | Activity | Completed |
|------|---|-----------|
| | COMPLETE REQUISITION PREPARATION SHEET FIRST | |
| 1 | Log into PASS using the login from the Data Sheet. | |
| 2 | Start a requisition. | |
| 3 | Name the requisition "(Your Name)- Lab 3.1". | |
| 4 | Browse for floppy diskettes. | |
| 5 | Add a quantity of 50 boxes of diskettes from a supplier with the lowest price per box to your requisition. | |
| 6 | Search the entire catalog for reams of 8 ½ x 11copy paper. | |
| 7 | Add a quantity of 245 reams of 8 ½ x 11copy paper from a supplier with the lowest price per ream and is an LSDBE entity to your requisition. | |
| 8 | Select the appropriate accounting codes from your data sheet. | |
| 9 | Change the shipping addresses on each item so that the shipping address of each item is a different location for your agency. (if possible) | |



| Step | Activity | Completed |
|------|--|-----------|
| 10 | Review and document your approval flow on your data sheet. | |
| 11 | Review the summary of the requisition. | |
| 12 | Submit the requisition. | |
| 14 | Log out of PASS. | |





- 1. Complete Requisition Preparation Sheet.
- 2. Type in your Requestor login as per your Data Sheet.

You are now logged into PASS.



3. Click Requisition under Create on the Process Step Area on the PASS Swoosh screen.

The Add Title screen appears.

4. Type "[Your Name]- Non-Catalog item" in the title.



5. Click Next to proceed to use Add Items screen.

The Add Items screen appears.



6. Click the Non-Catalog tab.

The Non-Catalog portion of the Add Items screen appears.

| Buyer | Walcome Armette Tibb | ur laat visit 3/20 | /2003 1;52 PM | | | | |
|---|--|---|--|---|---|--|--|
| Description | Harris | Logent | Preferences | Toggie Tips | Tuggle Gurrency | Help | |
| Tris Add Items Add Items Add Items Add Items Add Items Comments Accounting Accounting | Add Items Requisition PR207 United Requisition Add terms to your adding toms, did Catalog Non-Catal If you cannot laice purchasing depart the mon-catalog in | requisition. You Next to go to og Tevantes des en itern in the formation you e | can add items from the next step in the pri- Saved Searches s catalog, describes the wolved to complete th nter. | re catalog or from your fi possic or Summary to re item using the fields bek e order. Netter You must | evorites fet, er anter deta view your request, pr. Nen-catalog items me olick Add Reen before le | Pres Next > Transformer and a second | equisition ame: 0 Th ; items: 00 |
| | Full Description: Finte | r a description f (no value) | or this item. | | Suppler / Quantity: | Ausiliary Part ID: | 1 |
| | Supplier: Contacti Supplier Part Number: | (No Preferen (no value) | | | Unit of Ne Price: Amount: | sasurei | so.0005 |
| 4 | | | | | | Ad | i Dam |



7. In the Description field, type in the details from your Data Sheet.

The Description field is a mandatory field. In this scenario, you are creating a services request with discrete line items.

| Buyer | Welcome Annette Tibb | s Tast visit 3/26. | /2003 L152 PM | | | |
|---------------|--|--|--|---|--|--|
| | Home | Logowt | Preferences | Toggle Tips | Toggle Currency | Help |
| Requisition | 2 Add Items | | | | C Prev. | ext 2 Summary |
| 1 Title 🖍 | Requisition PR207 Untitled Requisition | | | | | Requisition Items: 0 Total: |
| Accounting | Add items to your adding items, dick | requisition . You Next to go to t | can add items from the he next step in the pro- | e estalog or from your favorite cess or Summary to review y | is list, or enter details for non-c rour request. | atalog items. When |
| 5 Comments | Catalog Non-Catalo | G Favorites | Saved Searches | | | |
| Approval Flow | If you cannot local purchasing departs the non-catalog inf | e on item in the nent may get in ormation you er | catalog, describe the i volved to complete the oter. | tern using the fields below. No order: Nets: You must click & | n-catalog items may take longe Add Item before leaving this a | r to process becaus rean, otherwise you |
| | Full Description: | a description fo | or this item. | * | | |
| | *Commodity Code: | (no value) | | | Supplier Auxiliary Par Quantity: | t ID: |
| | Suppler: | (No Preferenc | e) 🖃 🗈 | | Unit of Measure: | each - |
| | Contact: | (na value) | | | ince de | #0.00USD |
| | Supplier Part Number: | ja Ka | | | Amann. | \$0.000 aD |
| | | | | | | Add Item Up |
| 4 | | | | | | [_] |

8. Click 🗄 next to the Commodity Code field.

The Choose Value for Commodity code screen appears.

9. Type the commodity code from your data sheet in the textbox, preceding the Search button, and then click Search.

The commodity code appears on the Choose Value for Commodity.



Note: Commodity codes are based on text and numbers. You can do a search by using numbers or text.

10. Click Select to right of the commodity code.

The commodity code selected appears in the commodity code field on the Add Items screen.

11. Change price amount to \$30,000.00.



12. Click Add Item to add non-catalog item to requisition.

The View Line items screen appears. Notice your non-catalog items appear.



Note: You must click the Add Item button or the item will not be attached to your non-catalog requisition.

13. Click Next to proceed to the Add Accounting details screen.

The Add Accounting details screen appears.

14. Select the accounting codes for Agency object, and Index number from the drop-down list for each field.

If you have previously used a code, it will appear in the drop-down list for the field.

15. Click Split Accounting to proceed to the Split Accounting by Line Item screen.

Split Accounting - by Line Item Regult Bon PESST Non-Catelleg Requisition The one when the cary yes must be up it assumeting by abasing a color when the table By pull show hat Accounting Links in Like ttems read a detailed technology play developed for the new call center building Carment saalit Ber Percentage 🛩 Association Add solt Update Summer: No. L00% E4.458 1 Effective Ceter Appropriation Vice: 2003 (10/1/2003-0/90/2902) 🖷 🗖 Comp (b) E211 (OFFICE SUPPLIES) 2012 Agency Obt: (no value) 💌 🖬 Agencyl CROCOLIPT, OF CONSUMER AND RESULTORY APPLIES. Index Ro LIMIN CORRECTOR-DORA CALL CINITERS Program Capt Associate APPR 2 (DIPARTMENT OF CORSUMER & REGULATORY APPR) 🛒 🖬 Rend Mer 1081 (LOCAL KOLINCE) 💌 D -Grant Mu/Whates: One value: (no velae) 💌 🖾 subtrastee MID Present No/There: (no valie) TOTIO CORT. OF CONSUMER AND REQUIRTORY APPARESS Appropriates No. (no velez) 💌 🖬 Demoy Code Li - 11 Agency Code 21 (no value) Ono velkel 💌 🗖 Agency Code 31 (no value) 💌 🖬 Gand Gigente Funds Override: 85/02/0185 offective costs: 000 0 11.0/1/000 2-9/00/2003 · 0 Appropriation Value: Value mant (no velee) 💌 🖬 *toonp.ckj I value went ha net. (no value) 💌 🖬 Agency Obt: CRO (DIRFT, OF COMOUNTRIAND RESILIENCE) APPRILES. Agency LINIO CORRECTOR-DORA GALL CENTERS Index No: PERGERIN CREEK ANDRESS (DEPARTMENT OF CORSUMERING RESOLUTIONY APPA) 💌 🖬

The Split Accounting by Line Item screen appears.



- 16. Change the Split Amount for the first set of accounting to 50%.
- 17. Change the codes for the second set of accounting information.
- 18. Click OK to accept changes.

The Edit Line Item Accounting screen appears.

19. Click OK to accept changes.

The Add Accounting Details screen appears.

20. Click Comments on the Process Step Area.

The Add Comments screen appears.

| Buyer" | Welcome Training Requestor last visit 7/6/2003 10:33 AM | | |
|--|---|---------------------------------|---------------------------------------|
| Requisition | Home Logost Preferences Topple Tips Topple Conneccy | Help | Training |
| Titla Add.lbama Accounting Accounting Stipping Commerts Accounting Accounting Sipping Commerts Accounting Accounting Summerts Accounting Accounting Summerts Accounting Summerts | Add Comments Requisition RQ100043 Training Requisition Your company may require you to justify your purchase request. Enter justification comments, if des Comments - Entire Requisition Comments: Ineed for logistics In | Rect > 2 Requiri Items: 1 | ummay Exk kim Totali \$31.95050 |
| | Expand Add Comments - by Line Item to add comments to individual line items. Comments - by Line Item Barns in this request: 1 No. Type ISR Description I SPORTS BOTTLE-32 02, OASIS-#1 selling driftware 45 | ty Unit P 5 each \$0.71 | rict Amount USD \$31.95850 |

21. Type in any comment in the Comments field.



Note: If you had an attachment, you may want to type "See attachment" which will notify the Contracting Officer that there is an attachment. The comment is optional since the Contracting Officer will also see a paper clip symbol if there are attachments to a requisition.



22. Click on Add Attachment to view the process.



Note: The process is similar to add attachments in email.

23. Click Cancel to return to the Add Comments screen.

Note: You can add multiple file attachments to a requisition, but only one at a time. However, if you click Delete it will delete all your file attachments and you will need to re-build the file attachments list if you only intended to delete one or a few of the file attachments.

24. Click Approval Flow on the Process Step Area to the left of the Add Comments screen.

The Approval Flow screen appears. Notice the approval flow may be different depending on what you want to buy.

| Welcome Training Requestor 1 | ast visit 7/8/2003 | 10:33 AM | | | | 16.15 | * * * |
|--|--------------------|---------------------|----------------------------|--------------------------|---------------------|-----------------------------------|----------|
| Home Lo | pout | Proferences | Toggle Tips | Toggle Currency | Hel | P | Training |
| 6 Approval Flow | | | | | < Dres Nex | t > Summary | Eat |
| Requisition RQ100043 Training Requisition | | | | | * eev | Requisition Items: 1 Total: \$ | 31.95USD |
| 1 The approval flow clagram | shows who need | s to approve your (| request. You can add appro | vers or delete them from | m your request. | | |
| Approval Flow - Requisition | - | | | | | | |
| Legend: 📓 Pending 📑 Ad | tive 👿 Approvi | ed 📕 Denied 🎽 | Optional | | | | |
| RQ300043 📷 🖵 🔳 Eur | ids Commit | | Budget Responsible Manage | | 0 Contracting Offic | *] | Approved |
| Add Approver | | | | | | | |
| | | | | | < Dyga Nax | it > Summary | Evit |

25. Review the requisition, and click Submit.

The New Requisition-Submitted screen appears.



Individual Exercise 3.2 – Create a Non-Catalog Requisition

Objective(s) Submit a requisition with non-catalog items.

Duration

20 minutes

Instructions

Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

| Step | Activity | Completed |
|------|--|-----------|
| | COMPLETE REQUISITION PREPARATION WORKSHEET FIRST. | |
| 1 | Log into PASS using the login name from your Data Sheet. | |
| 2 | Start a requisition. | |
| 3 | Name the requisition "(Your Name – Lab 3.2". | |
| 4 | Add two separate non-catalog items to requisition. | |
| 5 | Select the appropriate accounting codes from data sheet. | |
| 6 | Review shipping details. | |
| 7 | Review and document your approval flow on your data sheet. | |
| 8 | Review the summary of the requisition. | |
| 9 | Submit the requisition. | |



| Step | Activity | Completed |
|------|--|-----------|
| 10 | Check to make sure the requisition has been submitted. | |
| 11 | Log out of PASS. | |
| 12 | Log back into PASS to check the status of your requisition. | |
| 13 | Check to make sure the requisition has been submitted and funds have been committed. | |
| 14 | Log out of PASS. | |



Guided Practice 4.1 - Approve a requisition

1. Login as the Approver according to the Data Sheet.

You are logged into PASS and the PASS Swoosh screen appears. The Swoosh screen will appear and the Approve button should be flashing. The flashing indicates there are requisitions awaiting your approval.



2. Click on the Approve button on the Swoosh menu.

The Approve Requests screen appears. The Process Step Area indicates how many approvals you are required to complete, as well as how many that are optional. Required and optional approvals do not appear in the same queue.

| pprove Approve 5 Required Approval 5 Sational Approval 9 Tro | ono rove Re su have 5 m pe ID | Logout QUESTS equests awaiting yo Date Submitted | Preferencies ur approval. Requester | Aş | leggila Tips Toggila Currency prove Deny | Help | |
|---|--|---|---|--------------|---|------|-----------|
| pprove Approvel 5 Detional Approval 5 Tro Tro | ove Re su have 5 m pe ID | quests equests awaiting yo Date Submitted | ur approval. Requester | _Aş | prove Deny | | |
| Required Approval 5 Optional Approval 9 Tro | ou have 5 m pe ID | equests awaiting yo Date Submitted | ur approval. Requester | Aş Status | prove Deny | 12 | |
| 2ational Asseroval 2 Tro Tru | ou have 5 m pe ID | equests awaiting yo Date Submitted | ur approval. Requester | A: | prove Deny | | |
| | ou have 5 m pe ID | equests awaiting yo Date Submitted | ur approval. Requester | Status | The | | |
| To To To | ou have 5 m pe ID | equests awaiting yo Date Submitted | ur approval. Requester | Status | Title | 12 | |
| | pe ID | Date Submitted | Requester | Status | Title | 30 | |
| | | | | Carence and | LUME | | Amoun |
| | PR683 | Tue, 10 Jun, 2003 | Annette Tibbs | Submitted | Copy of Training Materials Review | \$9, | 569.60US0 |
| <u>r</u> 🖻 | PREED | Fri, 6 Jun, 2003 | Annette Tibbs | Submitted | Untitled Requisition | | \$0.00US |
| | PR637- | Fri, 23 May, 2003 | Annette Tibbs | Submitted | System Test C1.3 change/cancel | 5 | 499.20USI |
| 中 🖻 | PR241 | Wed, 2 Apr, 2003 | Annette Tibbs | Denied | CRP.Test5-Clemmons | \$1, | 677.60USI |
| | PR235 | Wed, 2 Apr, 2003 | Annette Tibbs | Denied | CRP Test4-Clemmons | \$ | 254.16USI |
| | | | | | | | |



3. Click on the ID or Title of a requisition from your Data sheet to review the details.

The details of the requisition appear defaulted to the Form tab.

| Buyer | Welcome E. Savann | ah Little Tast v | sit 6/12/2003 6:28 | PIM | | | 1 | * * * |
|---------------------|---------------------|------------------|----------------------|---------------------|-----------------|--------------|------------|----------|
| | Home | Logout | Preferences | Teggio Tips | Toggle Currency | Help | | |
| Approvis | PR683 - Copy | of Traini | ng Materials | Review | (6). (4) | | Status: S | ubmitted |
| Required Approval 5 | 2011 2 | | | | | | | |
| Uptonal Approval D | Back to Approve | | | | | | | |
| | | | | Approve Deny | Print | | | |
| | Form Approval | Flow Order | Receipts Hi | atore | | | | |
| | I | 1000 | | | | | | |
| | Title - Requisition | 1 | | | | | | |
| | Title: | Copy of Train | ing Materials Review | 6 | | | | |
| | All Catalog Items: | v. | | | | | | |
| | Preparer's Agency: | CRØ (DEPT. C | F CONSUMER AND | REGULATORY AFFAIRS) | | | | |
| | Funds Status: | Funds Commi | tted | | | | | |
| | Line Items | | | | | | | |
| | No. Type SR D | escription | | | Qty Unit | Price | Amount | Action |
| | 1 🛄 A | dministrative Br | upport | | 160 hour \$ | 59.81USD \$! | ,569.60USD | Detail |

4. Click on the Approval tab to view the other Approvers for this particular requisition.

Notice the Active symbol next to the user name that you used to log on. Once you have acted on the requisition (approve or deny), the next Approver in the flow will receive it. The next Approver will be in a Pending state until you have acted.

| Buyer - | Welcome E. Savann | iah Little last visit.6 | V12/2003 6:28 PM | | | |
|---------------------|-------------------|-------------------------|------------------|---------------------------|-----------------|------------------|
| | Home | Logout | Preferences | Toggle Tips | Toggle Currency | Halp |
| Approve | PR683 - Copy | of Training | Materials Revi | ew | | St |
| Octional Approval 1 | Back to Approve | | | Approse Dens | Part | |
| | Form Approval | Flow Orders | Receipts History | 1 × Optional | | |
| | PR663 📻 🖵 🗖 | Eunds Check | | udaet Responsible Manager | | asting Officer - |
| | Add Approver | | - <u>a</u> | E. Savannah Little | [2 | |
| | Back to Approve | | | | | |



5. Select Approve to approve the requisition.

The Add Comments screen appears. You may or may not add comments, but you must hit OK for the approval/denial to be submitted. If you have denied a requisition, you are encouraged to explain why you denied the request.

| Buyer | Welcome E. Sav | annah Little Tast | visit 6/12/2003 6:28 | PM | | | 1 1/ | * * * |
|-------|-------------------|--------------------|----------------------|------------------------|-----------------|------|------|-------|
| | Home | Logout | Preferences | Toggle Tips | Toggle Currency | Halp | | |
| | Comments | | | | | | | |
| | You chose to appr | rove PR663, requ | ested by Annette Tib | bs, | | | | |
| | | | | | | | | |
| | Comments: | | | | | | | |
| | | indude commen | t and attachment (F | ane exists) on purcha- | se orders | | | |
| | 9.602 | | | | | | | |
| | Archive Options: | (c) to folders . D | mbive Items - | | | | | |
| | and the light | its to inder: In | | | | | | |
| | | | | OK Cano | - | | | |
| | | | | | | | | |

6. Click OK to confirm the approval.

You must Click OK even if you have not added any comments. If you want to rethink your decision, you can click on Cancel, which will bring you back to the requisition. Once you Click OK, the Approve Requests screen appears if you have more requisitions pending your approval. The requisition you just approved no longer appears in the queue. If you have no more requisitions to approve in either queue, you are returned to the Swoosh screen.



Guided Practice 4.2 - Adding Approvers

1. Log in as the last Approver in the approval flow from your original requisition.

You are logged into PASS.

| Buyer- | Welcome E. Sa | ivannah Little Tact | visit 6/12/2003 6:28 | PM . | | | |
|--|---------------|---------------------|----------------------|-------------|-----------------|------|--|
| | Hame | Logout | Preforences | Teggla Tips | Toggle Currency | Halp | |
| Approve Neccis Approvel Status Composing Submitted Approved Denied Creats Remaining Explore Saved Searches System Searches System Searches Explore Saved Searches Stations Tokians Report Standard Reports | Status | Approve | Prederiotes | Rece | trogge Currency | Hatp | |
| Reconcile | 0 | | | V | | | |
| Charges | 1 | | | | | | |

2. Click on the Approve button on the Swoosh menu.

The Approve Requests screen appears. The Process Step Area indicates how many approvals you are required to complete, as well as how many that are optional. Required and optional approvals do not appear in the same queue.

| Buyer" | 2 | W | elcome | E.Saya | nnah Little last vis | 1.6/12/2003 | 6128 PM | | | | |
|-------------------|----|----|---------|--------------|----------------------|------------------|-----------|-----------------|----------------------|------|---------------|
| | | | Home | | Logent | Preferences | | oggle Tips | Toggle Carrency | Help | |
| Approve | | Ap | pro | ve Re | quests | | | | | | |
| Required Approval | 12 | | | | | | | | | | |
| Optional Approval | 0 | | | | | | 40 | prove De | DV . | | |
| | | | | | | | | | | | |
| | | - | - You I | have 5 n | equests awaiting yo | ur approval. | | | | | |
| | | | Type | 10 | Date Submitted | Requester | Status | Title | | | Amount |
| | | 7 | | PR683 | Tue, 10 Jun, 2003 | Annette Tibbs | Submitted | Copy of Traini | ing Materials Review | | \$9,569.60USD |
| | | - | | PR680 | Pri, 6 Jun, 2003 | Annette Tibba | Submitted | Untitled Requir | aition | | \$0.00USD |
| | | 1 | | PR637- U2 | Fri, 23 May, 2003 | Annette Tibbs | Submitted | System Test C | 21.3 change/cancel | | \$499.20USD |
| | | Ę. | | PR241 | Wed, 2 Apr., 2003 | Annette Tibbs | Denied | CRP TestS-Cle | tinnans | | \$1,677.60USD |
| | | Ū. | | PR235 | Wed, 2 Apr, 2003 | Annette Tibbs | Denied | CRP Test4-Cie | mmons | | \$254.16USD |
| | | | 100000 | | | - | | | | | |
| | | - | DH 09 | a to Fold | ter Inchive Iter | 8 | | | | | |



- 3. Click on a requisition you created. Click on the Approval Flow tab.
- 4. Click Add Approver to add another approver to the requisition.

A form with the information required for adding an Approver appears.

| Buyer" | | Welcome C. Savennah Little lest visit 0/12/2003 6:28 PM | | | | | | | | | |
|---|---|--|---------------|-------------------------------|------------------------|---------------------------|-----------|---------------------------|--|--|--|
| | | Home | Log | out | Preferences | To | ggle Tips | Toggle Currency | | | |
| Approve • Required Approval Optional Approval | 2 | PR683 - Copy | of Training | Materials | Review | Арргоне | Deny | Print | | | |
| | | Porm Approvel Select the user or Provide a reacon: Specify an approve | Flow Orders | Receipts His E. Savannah I | attie • | | | | | | |
| | | Legendi 🖉 Pen PR683 📷 🖵 | ding 📑 Active | Approved | Denied <u>+</u> Option | elble Manager h Little | c c | CR0 Contracting Officer 6 | | | |

5. Click to the right of the Select the User or Role to Add field. The Choose Value for Approver screen appears.

| Buyer- | Welcome E. Saya | inniah Little - last | visit 6/12/2003 6:20 | PN: | | | * * * |
|--------|-----------------|----------------------|----------------------|-------------|-----------------|------|------------|
| | Home | Logout | Preferences | Toggle Tips | Toggle Currency | Help | |
| | Choose Val | ue for App | rover | | | | Cancel |
| | Field: Name | | Search | | | | |
| | | | | | | Page | 1. 24 + ++ |
| | Name | | | | | | Acción |
| | AP Specialist | | | | | | Select |
| | Adam Rubinson | | | | | | Belect |
| | Adrian Thompson | 6 | | | | | Select |
| | Agency Director | | | | | | Salact |
| | Agency Manager | | | | | | Select |
| | Ajay Kapoor | | | | | | Salect |



- 6. Type "Training" in the textbox preceding the Search button, and then click Search.
 - A list of all training ids, which contain "Training" in the name, appear.

| Buyer | | Welcome Treini | ng Requestor lest | visit 7/9/2003 6:39 / | 124 | | | |
|---|-----|---------------------------------|--|--|--|---|---|-----------------------|
| | | Home | Logent | Preferences | Toggle Tipe | Toggle Currency | Help | Training |
| Requisition | | Choose Va | lue for App | rover | | | | Cancel |
| 1 Idla 2 Add Rems | * * | Click Select containing to (s). | t to add that value hat text. You can a | e to your request, or Siso click a page num | type a value in the se ber to display the val | arch field and click Search ues that appear on that pa | h to retrieve a list of vo ge, and then make you | alues ar selection |
| Accounting Shaping | * * | Field: Neme 📴 | ning | Search | | | Pag | ge 1 <u>2 3</u> ⊧ |
| Gammente 😔 | ~ | Name | | | | | | Action |
| Approval Plaw | * | Training AP Spe | cialist | | | | | Select |
| Summary | | Training Agency | Director | | | | | Salert |
| | _ | Training Agency | Manager | | | | | Select |
| | | Training Agency | Receiver | | | | | Select |
| | | Training Agency | Specific Security | Officer | | | | Select |
| | | Training Approv | er. | | | | | Delect |
| | | Training Approv | er 2 | | | | | Balact |
| | | Training Budget | Responsible Mana | sger | | | | Select |

7. Click Select to the right of the Training Agency Director.

The approval flow screen re-appears.

- 8. Select the radio button of your approval node.
- 9. Choose the In Parallel radio button.

The new Approver will appear in parallel to you.

| Form Approval Flow Orders | Receipts History | |
|---|---|-----------------------------|
| Select the user or rele to add | Training AP Specialist 💽 🛄 | |
| Provide a reason: | Freed for monitoring | |
| Specify an approver to add relative | 10: | |
| Legend: 📓 Pending 📃 Active | 🖌 Approved 📕 Denied 📧 Optional | |
| RQ100000 📷 🖵 🔽 Funds (| Commit | C A POO Contracting Officer |
| Specify where you want to add the r © in parallel © before © after Is this user/hole required to approve OK Geneal | new approver: 97 🗵 approval required | |
| Back to Approve | | |



10. Remove the checkmark in the Approval Required checkbox.

The new Approver will not need to approve this request before it proceeds to the next Approver. This new Approver will be a Watcher.

11. Click OK to confirm the new Approver.

Notice how the new Approver is noted with a line extending throughout approval flow.

12. Log out of PASS.

The PASS log in screen appears.



Individual Exercise 4.1 – Approve a requisition

Objective(s) Approve a requisition

Duration 20 minutes

Instructions

Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

| Step | Activity | Completed |
|------|---|-----------|
| 1 | Log into PASS as the Approver for one of your requisitions. | |
| 2 | Click on the Approve button on the Swoosh. | |
| 3 | Review details of your requisition. | |
| 4 | Approve the requisition. | |
| 5 | Provide comments to support your approval. | |
| 6 | Click on OK. | |
| 7 | Review the approval status of other requisitions. | |
| 8 | Return to PASS Home page. | |
| 9 | Log out of PASS. | |





Guided Practice 5.1: Reviewing Purchase Orders

1. Log in as the Requestor according to your Data Sheet.

You are now logged into PASS. The Swoosh screen appears.



2. Click on Status on the Swoosh main screen.

Every requisition that you have created will be displayed.

| Buyer- | | Welcome Training Requestor Test visit 7/9/2013 0:05 AM | | | | | | | | |
|----------------------------------|------------------------|--|------------------------|--|-----------------------------|-------------------------------|-----------------------------|---------------------------|---------|--|
| | | Home | | Logout | Proferences | Toggle Tips | Taggie Carrency | Halp | Trana | |
| Status Campasing | a S | tatus | | | | | | | | |
| Submitted Accuracy Derived | 1 1 | The more | e a summa dema to m | ry of the iteres yo ove to the design | ou have nee rated folder | uested. Cick an ID to display | s details for the associate | d request. You can eslect | one sr | |
| * Shak All | 4 | | | | | Cose Delate | | | | |
| | Requests in progress 4 | | | | | | | | | |
| | 1 | Type | ID | Date Created | Status | THE | | 16 | Amount | |
| | - 7 | | 10100015 | Today, 9:04 AM | Submitted | Untitled Requisition | | \$ | 2.33050 | |
| | - 9 | 1 | 10100084 | Today, 8:55 AM | Ordered | temp training cell | | \$ | 2.33USD | |
| | 1 | | 10100013 | Today, 5:51 AN | Ordered | Training Requisition | | \$ | 2.33USD | |
| | - 1 | 100 | ROL00081 | Today, B:36 AM | Ordered | Training Terro Reg | | 1 | 2.33USD | |
| | Ľ | Har | e ta Faider | Archive Dam | | | | | | |



3. Select the ID or Title of the requisition you created with the Status of Ordered.

Selecting the link under Status will bring you to the Purchase order that the supplier received. This is in a printable format.



Reference: Refer to the Job Aide: How to Check the Status of a Requisition.

4. Select the Orders Tab.

You are able to see when the Order was made.

| Buyer" | Welcome Trainin | ng Requestor last visit | 7/9/2003 9:05 # | м | | | |
|------------------------|----------------------------|---|--------------------------------------|--|--|--|------------------------|
| | Home | Logoet | Preferences | Toggle Tipe | Toggle Currency | Help | Training |
| Status | RQ100003 | - Training Req | uisition | | | Stat | us: Ordered |
| Composing 0 | | | | | | | |
| Approved 3 Denied 0 | These are the approval. Yo | ne details of the reques ou can also copy the re | t you selected. I quest and print | Depending on its the datails, Revie | status, γου can edit, change, ca w your request and take the de | ncel, or submit the re sired action(s). | qu o st for |
| Show All 4 | Back to Status | | | | | | |
| | | | | Change /Cancel | Print | | |
| | Form Approv | val Flom Orders 1 | Receipts Hist | ory | | | |
| | Order 10 | Date Created | | Status | Title | | Amount |
| | P0100002 | Today, 6:59 AM | | Ordered | Training Requisition | | \$2.33USD |
| | | | | | | | |
| | Back to Status | | | | | | |
| | Dide to starta | | | | | | |
| | | | | | | | |



5. Select the History Tab.

You are able to see the entire history of your requisition.

| Buyer" | Welcome | Training Requestor last | viát 7/9/20 | 03 9:05 AM | | | Ľ |
|--|--------------------|---|------------------------------|---|---|---|---------------------------------|
| | Home | Logost | Prefere | nces Toggle Tips | Toggle Carrency | Help Tranh | ø |
| Status Composing | RQ1000 | J03 - Training R | lequisit | ion | | Status: Order | eđ |
| Submitted Approved Denied Share All | a i These appro | are the details of the re val. You can also copy t | equest you s he request a | elected, Depending on its statu: and print the details. Review you | s, you can edit, change, or ir request and take the de | ancel, or submit the request for sized action(s). | |
| SHOW HI | Back to Sta | bus | | | | | |
| | Form Date 1 | Approval Flow Order | Action | ta History Summary | | | 1 |
| | Today, | PASS System Administrator | Ordered | Order PO100002 was successfi SendVerbariba.procure.server | ully .ordering.AribeNetworkMir | neOrderSender to LASER ART | Tranna Drdered t for I |
| | Teday, 9:00 AM | PASS System Administrator | Ordered | INC . Order PO100002 was successfi SendVerbconfig.jeva.custorn.A | ully SMP_ScarERPOrderSende | Tto LASER ART INC. | |
| | Today, B:59 AM | Training Contracting Officer | Approved | R0100003 approved. | | | |
| | Today, 8:58 AM | Training Budget Responsible Manager | Approved | R0100003 approved. | | | |
| | Teday, 8:57 AM | Treining Approver | Approved | Summary Order P0100002 was successfully SendVerbariba.procure server ordering.AribeNetworkMimeOrderSender to LASER ART [NC. Order P0100002 was successfully SendVerbanfig.jerva.custom.ASMP_SoarERPOrderSender to LASER ART INC. R0100003 approved. R0100003 approved. R0100003 approved. | | | |
| | Today, 8:52 AM | Funds Commit | Approved | R0100003 approved. | | | Drdered t for I |
| | Today, 8:51 AM | Training Requestor | Submitted | R0100003 submitted for appro | val. | | |
| | Back to Sta | tus | | | | | |

6. Log out of PASS.

You are now logged out of PASS.



Tool: The Facilitator will demonstrate the Change/Cancel Purchase Order Process. A Change order must go through the approval flow one another time.



Individual Exercise 5.1 - Change Order Exercise

Objective(s) Change order.

Duration:

20 minutes

Instructions:

Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

| Step | Activity | Completed |
|------|---|-----------|
| 1 | Log into PASS as a requestor. | |
| 2 | Select Status from the Swoosh. | |
| 3 | Select a requisition that has been ordered. | |
| 4 | View the details of the ordered requisition. | |
| 5 | Select the Change/Cancel button. | |
| 6 | Change the quantity on the line items. | |
| 7 | Review new approval flow. | |
| 8 | Submit new version. | |
| 9 | Log out and log in as all the Approvers on the Approval Flow to complete process to make the new version into a Purchase Order. | |
| 10 | Log out of PASS. | |



Guided Practice 6.1 – Receiving

1. Log in as Designated receiver according to the Data Sheet. The PASS Homepage appears. Click Receive on the Swoosh screen.

If there are items that have been Ordered, the Receive button on the Swoosh menu should flash to indicate there are items waiting to be received.



2. The Select Order screen appears.

| Buyer | Welcome P | Richard Havis - last visit 6/10/2013 11:27 AV | | | |
|------------------|--------------|---|-------------------|--------------|--------------------------------|
| | Horse | Logout Prefirences | Toggik Tips | Toggle Carry | sney Help |
| Receiving Steps | 1 Se | lect Order | | | Tat |
| 🜖 Select Order 🖌 | Select ar | item to receive | | | Smarsh |
| Salact Recept | Orders retur | medi 16 | | | Page 1 2 F |
| B Receive | Order ID | Title | Date Greated | Status | Supplier |
| Additional Info | P030 | INVOICE Scenario - DO NOT MODIFY - 5 | Mon, 31 Mar, 2003 | Ordered | GRAHAM, INC. |
| Summer | P011 | INVOICE Scenero - DO NOT MODIFY - 4 | Mon, 31 Mar, 2003 | Ordered | GRAHAM, INC. |
| | P032 | INVOICE Sceneric - DO NOT MODIPY - 3 | Mon, 31 Mar, 2003 | Ordered | GRAHAM, INC. |
| | P013 | INVOICE Scenario - DO NOT MODIFY - 2 | Mon, 31 Mar, 2003 | Ordered | GRAHAM, INC. |
| | P034 | INVOICE Scenario - DO NOT MODIFY - 1 | Non, 31 Mar, 2003 | Ordered | GRAHAM, INC. |
| | P0113 | GRP Test2-Clammona | Thu, 3 Apr, 2013 | Ordered | HOOD'S INSTITUTIONAL FOODS INC |
| | P0114 | CRP Test3-Clemmons | Thu, 3 Apr, 2083 | Ordered | NATIONAL ASSOCIATES, INC. |
| | P0127 | CRF Test 2 - Clifford Cosks | Thu, 3 Apr; 2083 | Receiving | HOOD'S INSTITUTIONAL FOODS INC |
| | P0157 | CRP Test9 - Thomas Henderson | Thu, 9 Apr, 2083 | Receiving | HOUD'S INSTITUTIONAL FOODS INC |
| | P0162 | CRP.Test9-Clifford Cooks | Thu, 3 Apr. 2013 | Ordered | NATIONAL ASSOCIATES, INC. |
| | P0163 | CRP Test9-Clifford Cooks | Thu, 3 Apr., 2013 | Ordered | HOOD'S INSTITUTIONAL FOODS INC |



3. Choose an order to receive by clicking on the link.

The Receive Items screen appears. If you have many line items on the order, you may receive each line separately. You can also accept the entire order if all items were received properly.

| Buyer | Weicome Richard | Welcome Richard Hamis Just visit 6/10/2002 11:27 AM | | | | | | | | | | |
|-------------------|-------------------------------------|---|-------------|----------------------|-----------------|-------------|--------------|------|--|--|--|--|
| | Home | Logout | Preferences | Toggie Tipe | Toggie Currency | Hal | p | | | | | |
| Receiving Steps | 3 Receive | tems ! | | | | < Pro | Wait S | East | | | | |
| O Salast Grabar - | Keceipt BC293 F0129 - CRP Test 2 | - Clifford Cooks | | Accept All | | | | | | | | |
| 🕄 Receive 🗸 | | | | | | | | | | | | |
| Addhenal Irfn | Line Items - Roc | oiving Noodled | | | | | | | | | | |
| | No. Oty Descrip | ation | Pres | erty Number Pres. Ac | cepted Accepted | Rejected D | ate Received | N | | | | |
| | 1 R Efin Las | ef, Banana, 72 éa | 'iea,io: | ×. | 2 | <u>e</u> [1 | 'eday | | | | | |
| | Receipt Details | | | | | | | | | | | |
| | Order ID: | P0129 | | | | | | | | | | |
| | Ovider Title : | CRP Test 2 - CR | fferd Cooks | | | | | | | | | |
| | Close Order: | C Yest R No | | | | | | | | | | |
| | Date: | Today, 9:00 PM | | | | | | | | | | |
| | Processing Status: | Receiving | | | | | | | | | | |

4. Choose to Accept All.

The Summary screen appears. Click Submit to process the receipt. The Receiving Done screen appears, and the receipt has been created.







6. Click on the Logout button on the top navigation bar to exit the system.

7. Log back into the system using the Requestor according to your Data Sheet.

The Swoosh Screen appears. Select Approve.





8. Place a check mark in the check box preceding your Purchase Order.

| | writering there | g Peprover Test | Part 17-0/2012-011 | 11.000 | | | |
|------------------------------|---------------------------|---------------------------------------|--------------------------|----------------|-------------------------------------|-------------------|------------|
| | Tome | Logout | Preferences | Тордін Тірі | Toggie Currency | Thelip | Trainin |
| oprave Landrad Approvel 1 | Approve Re | equests | | | | | |
| Ostional Approval 0 | Citcle an BD can also edd | to display details Le comment to t | for the associate | d request, Cli | di Appreve or Deny to oppr | ove or deny the r | equest You |
| | | | | Address | Dervy | | |
| | You have 8 | requests anating | your approval. | Approve | the selected request(s) | | |
| | Type ID | Date Subs | itted Requests | er Status | Title | | Ameur |
| | Mana in Fol | 005 Tadas, 9:0 | AM Training Requestor | Submitted | United Requisitors | | \$2.33050 |
| | Mena to Pol | det Arthiet | Rems 💼 🚺 | | | | |

9. Click Approve to approve the receipt of goods.

The Comments screen appears. Click OK to confirm approval. The receipt has now been approved and the process is finished.

| Buyer" | Welcarie Train | ng Approver 1 | est visit 2764/000 R | Se des | | - | |
|--------|---|--|---|--|---|--|--|
| | Home | Legisl | Protorancas | Toggle Tips | Toggie Correct | marp. | Treesage |
| | Comments | | | | | | |
| | Enter a con decument of select does when you a | whent as parts ras created in not exist in the re done. | of year approval. Vi a different partition, at partition, the doo | is can also archive it will be archived ument will be move | this document to a differ to the selected failder in d to the Archive Ibees | rent folder, if desired. That partition. If the fs folder automatically. | If the sider you Click GK |
| | You chose to app | rs+4 8Q1000 | IS, requested by Tr | ering Requestor. | 6 | | |
| | Converts: | | | - | | | |
| | | include carry | nent and attachmen | rt (if one exists) on | purchase orders | | |
| | Archive Options | | | | | | |
| | R Archive Her | n(e) to felder: | Archive Items 💌 | | | | |
| | | | | OK Can | int | | |



Individual Exercise 6.1 – Receiving

Objective(s): Partially receive and provide comments.

Duration:

20 minutes

Instructions:

Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

| Step | Activity | Completed |
|------|--|-----------|
| 1 | Log into PASS, using a Receiver's user name and password. | |
| 2 | Select an order to receive. | |
| 3 | Review each line item. | |
| 4 | If there is a line item with a quantity of more than 1, accept 1 and reject the remaining. | |
| 5 | Provide a reason to the supplier for the rejection of the line items. | |
| 6 | Review the approval flow process to ensure last Approver is original requestor. | |
| 7 | Submit the receipt. | |
| 9 | Log out of PASS. | |



Guided Practice 7.1– Locating and Organizing Information

1. Select the Explore button on the Swoosh.

The Explore button will bring you to many of the functions for locating and organizing information.

| Buyer - | Welcome Tibbs, | Welcome Tibbs, Annette last visit 6/12/2003 9:05 PM | | | | | | | | |
|---------|---------------------------|---|---------------------|------------------------|-------------------------|------|--|--|--|--|
| | Home | Logout | Preforences | Toggie Tips | Toggle Currency | Halp | | | | |
| | Explore | | | | | | | | | |
| | You can exp | lore the searches | you saved, browse t | he catalogs, or search | h for items in folders. | | | | | |
| | What would y | rou like to exp | lore? | | | | | | | |
| | Saved Search Catalogs | <u>85</u> | | | | | | | | |

2. Select Saved Searches on the Explore screen.

The Use Saved Search screen appears. If you already have saved searches, you are able to run them again.

| Buyer" | Welcome Tibbs, | Welcome Tibbs, Annette Tast visit 6/12/2003 9:05 PM | | | | | | | |
|---|--|---|----------------------|-------------|-----------------|------|--------|--|--|
| | Hame | Logout | Preferences | Toggle Tips | Toggle Currency | Help | | | |
| Explore | Use Saved | Search | | | | | | | |
| Saved Searches System Searches Cataloos | 🚺 Run, edit, o | r delete any of yo | our previously Saved | Searches, | | | | | |
| Falders | Click <u>Create a New Search</u> to create a new search. | | | | | | | | |
| | E Search Nat | ine. | | | | | Action | | |
| | Searching fo | or suppliers | | | | | Search | | |
| | Delete | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |



3. Click Create a New Search on the Saved Search screen.

The Create Search screen appears. Give your Search a descriptive name.

| Buyer" | Welcome Tibbs, Annett | e last visit o | 1/12/2003 9:05 PM | | | | |
|---|--|---|---|--|---|--|--------------------|
| | Home | Logost | Preferences | Toggle Tips | Toggle Currency | Help | |
| Explore | Create Search | | | | | | |
| Baved Searches System Searches Catalom Folders | Enter a search nam information, your s specific applies to t | ne, select a earch retrie the entire do | sategory in which to ves every document cument. | search, and specify a where any line term | our search criteria. If a filt matches the specified velue | er is associated with . A filter that is not li | ne item ne item |
| | Search Name: Untitlad | Search | | | | | |
| | Cabagory: Require | tian | | * | | | |
| | Filter Name | | Talue | | | | |
| | Commodity Code (any | line item): | (select a volue) | | | | |
| | Created On Behalf Ofi | | Tibbs, Annette | | | | |
| | Date Created: | | No Choice | | | | |
| | Statusi | | No Choice - | | | | |
| | Supplier (any line item) |): | (select a value) | 3 | | | |
| | Total Costi | | To: | | | | |
| | Search | | | | | Add/Remove | e Search filtere |

4. Select a Category for the Search.

This will specify what PASS documents you would like to include in your search.

| Buyer 🗠 | Welcome Training Requ | Jestor fast visit 7/8/2003 1:2 | ú PM | | * * * |
|--|--|--|---|---|--|
| | Home Logout | Preferences Toggle Tips | Toggle Currency | Help | Training |
| Explore | Create Search | | | | |
| Saved Searches System Searches Cataloos folders | If a filter is associa where any line iten to the entire docum | ne, select a category in which ted with line item information n matches the specified value nent. | to search, and sp , your search retri . A filter that is no | ecify your sean eves every doo t line item spec | ch criteria. sument ific applies |
| | Search Name: Pembro | oke | | | |
| | Category: Requisit | tion | • | | |
| | Filter Name | <u>Value</u> | | | eren de |
| | Commodity Code (any line item): | (select a value) | | | |
| | Created On Behalf Of: | Training Requestor | | | |
| | Date Created: | No Choice 💽 | | | |
| | Status: | No Choice - | | | |
| | Supplier (any line item): | PEMBROKE WEST, INC. | 1 | | |
| | Total Cost: | To: | | | |
| | Search | | 1 | Add/Remove Se | earch Filters |



5. Select a filter to search.

Click 🗄 to the right of the Supplier field to search Suppliers. The Choose Values for Supplier (any line item) screen appears.

| welcome | Welcome Tibbs, Annette Jast visit 6/12/2003 9:05 PM | | | | | | | | |
|---|---|--|---|---|---|-------------------------------------|--|--|--|
| Home | Lopeet | Proferences | Toggla Tips | Toggle Currency | Holp | | | | |
| Choose | e Values for Sup | plier (any lin | ne item) | | OK. | Gancel | | | |
| Currently | amently Selected | | | | | | | | |
| Company | 6 3 | | | 110 | LSDBE | Action | | | |
| GARDINE | R, KENYA & ASSOCIATES | | | 1521525134 | R | Remove | | | |
| | | | | | | | | | |
| Add to Cr | urrently Selected | | | | | | | | |
| Add to Co Click Curre to disp | Add to add the desired w ntiy Selected terns list. E play the values that appea | alue(s) to your Cum nter a value in the s ar on that page. Wh | rently Selected items search field and click en you are finished, | ist. Click Remove to rem Search to retrieve valid v dick OK . | ova the desired value alues. You can click a | (s) from your page number | | | |
| Add to Cr | Add to add the desired w nty Selected kerns list. E play the values that appex mpany | alue(s) to your Gun nter a value in the s ar on that page. Wh Search | antly Selected Remo search field and click en you are finished, | ist. Cick Removes to rem Search to retrieve valid v dick DK . | ova the desired value alues. You can click a | (s) from your page number | | | |
| Add to Cr Curre to dist Field : Cor Company | Add to add the desired w nily Selected terms list. E play the values that appear mpany IPDS | alue(s) to your Gum nter a value in the s ar on that page. Wh General | rantis Salacted karna search field and olick an you are finished, | Est. Cick Remove to rem Search to retrieve valid v dick DK, | ove the desired value alues: You can dick a LSDRE | (s) from you page numbe Actie | | | |

6. Type in any Supplier in the textbox preceding the Search button, and then Click Search.

Your results will be presented. Click Add to add the Supplier to your search. Then click OK to return to the Create Search page.

| Buyer * | Welcome Tibbs, Annette Tast visit 6/12/2003 9:05 PM | | | | | | | | | |
|--|--|------------------|----------------------------|------------------------|-------------------------|--------------------|------------|--|--|--|
| | Home | Logost | Preferences | Teggie Tips | Toggla Currency | Halp | | | | |
| Explore Saved Searches | Review Sea | arch Result | s | | | | | | | |
| System Searches Catalons Folders | These are your search results. Click Refine Search to refine your results. Click Save Search to save your search criteria. | | | | | | | | | |
| | Search Namer | Searching for su | ppiers | | | | | | | |
| | Search Category: | Requisition | | | | | | | | |
| | Search Filters: | Created On Beh | alf Of = Tibbs, Annet | te, Supplier (any line | item) = GARDINER, KENYA | & ASSOCIATES | | | | |
| | Sase Search | Refine Search | | | | | | | | |
| | Items that n | neet your search | oriteria: I | | | | | | | |
| | Type Date | Created Sta | tus Title | | | 10 | Total | | | |
| | Copy De | 9 May, 2003 Cor | mposing <u>TM: 1.1.1.2</u> | | | <u>R.0100023</u> : | \$35.82USD | | | |
| | | | | | | | | | | |



7. Click Search to generate your search.

The Review Search Results screen appears. All the requisitions that are related to your filter are displayed. You can further refine your search or save it

| Buyer - | Welcome Annet | te Tibbe last | t visit 5/14/2 | 003 8:34 AM | | |
|--|---|--|---------------------|---|--|----------------|
| Explore | Review Sea | arch Re | sults | nfernaces. Taggle Tips | Toggle Gurrenzy Help | |
| Evstern Searches Existern Searches Eniders | These are) | your search (| results. Click | Refine Search to refine your resu | its. Click Save Search to save your search | oritoria |
| | Search Category Search Riters Seve Search | : Requisition Created Or Refine Seas | n Behalf Of - mh | - Annette Tibbs, Supplier (any line in : 7 | tem) = HOODS INSTITUTIONAL FOODS | |
| | Type Date | Created | Status | Intie | 10 | Total |
| | - 100 m | 4 Apr, 2003 | Received | Bo's Second Invoice | PRIGT | \$148.00USD |
| | 🕂 🋅 Тие, : | 1 Apr, 2003 | Received | Bo's Third Invoice | PR169 | \$148.00USD |
| | 🕂 🧮 Wed, | 2 Apr, 2003 | Ordered | CRP Test2-Clammons | PR193 | \$193,28050 |
| | Wed, | 2 Apr, 2003 | Submitted | CRP-Test9-Clemmons | PR:293 | \$29,311.92USD |
| | 📮 🛅 Thu, 1 | 3 Apr, 2003 | Composing | Copy of CRP Test2-Clemmons | PR.379 | \$193.28USD |
| | 🕂 🛅 Тни, : | 3 Apr, 2003 | Composing | Copy of CRP Test2-Clemmans | PR.380 | \$193.28LISD |
| | 📫 🛅 Thu, 1 | 3 Apr, 2003 | Submitted | Copy of CRP Test2-Clemmons | PR 381 | \$193.28USD |
| | Capy D | aleta | | | | |

8. Click Save Search to save the search.

The Save Search screen appears. You can review the details of your search. Your search is not saved until the OK is selected.

| Buyer | Walcome Tibbe, a | Walcome Tibbe, Annette Tait visit 6/12/2003 9:05 PM | | | | | | | | |
|-------|---|---|-----------------------|--------------------------|------------------------|----------------|------------|--|--|--|
| | Home | Legest | Preferences | Toggle Tips | Toggle Currency | Help | | | | |
| | Save Search Ganal | | | | | | | | | |
| | Please confirm that you want to save the search using the search name you entered by clicking OK. Click Cancel if you do not want to save the search. | | | | | | | | | |
| | Search Name: | Searching for au | ppiera | | | | | | | |
| | Search Category: | Requisition | | | | | | | | |
| | Search Pilters: | Created On Behr | alf Of = Tibbs, Annet | a, Supplier (en y line i | tem) = GARDINER, KENYA | & ASSOCIATES | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | - | | | | | .01 | Cancel | | | |
| | | | | | | and the second | an destand | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |



9. Click Saved Searches link in the Process Step Area.

The Use Saved Search screen appears. The search you recently created is now listed.



10. Click on the Catalog link in the Explorer bar.

The Explore Catalog screen appears. This screen is similar in content to the Add Items screen when you are creating a requisition (Lesson 3-Requisitioning).





11. Type in a word or phrase in the Search field directly under the Catalog tab.

This is a general search for anything related to your word or phrase.



12. Click on Search to locate items meeting these criteria. All the items related to the term are displayed.





13. Click Save Search button to save this search.

The Save Catalog Search screen appears. Select a title that fits your needs. Click OK to generate saved search. The Explore Catalogs screen re-appears.

| Buyer - | Welcome Tibbe, | Walcoma Tibbe, Annette, last visit 6/32/2003 9:05 PM | | | | | | | |
|---------|-------------------------------|--|--------------------------|--------------------------|------------------------------|---------------------|--------|--|--|
| | Home | Logost | Prefarences | Toggle Tips | Toggle Currency | Halp | | | |
| | Save Catal | og Search | | | | CH | Cancel | | |
| | Choose a de | escriptive name fo | or this search . This is | ill help you to find and | reuse it later in the catalo | g Saved Search tab. | | | |
| | Search Namei Search Parame | Search for show | -'shoes' | | _ | | | | |
| | Search Scope: | Entire Catalog | | | | | | | |
| | | | | | | | | | |
| | | | | | | | Cancel | | |

14. Click Saved Searches tab.

Your search is now listed under Saved Searches. You will be able to run the search in future.

| Buyer" | Welcome Tibbs, | Welcome Tibbs, Amette Tast visit 6/12/2003 9:05 PN | | | | | | | |
|--|---|--|---|---|---|--------------------------|------------|-------|--|
| | Home | Logout | Preferences | Toggle Tips | Toggle Carrency | Help | | | |
| Explore | Explore Ca | talog | | | | | | | |
| Saved Searches System Searches Catalogs Toldaca | To locate an item to add to your request, click a category or sub-category fink, or enter a value in the search field and click Search to retrieve the list of valid values. You can also dick a page number to display the values that appear on that page, and then make your selection(a). | | | | | | | | |
| | Catalog Fav | ontes Saved S | iearches | | | | | | |
| | Saved start click Save | ches allow you to Search: You can | save commonly used return to the Saved S | l catalog searches. Af Searches tab to use w | ter you search for an item our saved search in the fut | and successfully return. | rieve reas | alta, | |
| | | | | | | | | | |
| | Name | | | | | 10 | Actio | | |
| | 🖓 Search for sh | noes | | | | | Search | Edk | |
| | Culate | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |



15. Click Catalogs link in the Process Step Area.

This enables you to clear the screen and return to original catalogs. Perform another search for an item.

| Buyer- | Welcome Tibbe, | Annette Tast visit | 6/12/2003 0:05 PM | | | | - 10 | | | |
|--|--|--|---|--|--|--|-------------------------|-----------|--|--|
| | Home | Logout | Preferences | Toggle Tips | Toggle Currency | Help | | | | |
| Explore | Explore Ca | talog | | | | | | | | |
| Saved Searches System Searches Catalogs Tolders | To locate an to retrieve to your selector | item to add to yei ie list of valid valu n(s). | ur request, click a c les. You can also di | ategory or sub-setego ek a page numberto o | rry link, or onter a value i display the values that ap | n the search field and pear on that page, and | click Sear I then ma | rch ke | | |
| | Catalog Favorites Saved Searches | | | | | | | | | |
| | Saardh @ Entire catalog C Current sategory Advance | | | | | | | | | |
| | Found 94 items for category Clothing Accessories. | | | | | | | | | |
| | Browse Ca | talog | | Hid | e details | View Items By: | Name | • | | |
| | - | | | | | Pa | ge 1 7 | 1 . st | | |
| | Catalog Home > | Apparel, Accessori | es and Personal Ca | e > Clothing Acces | sories | 1 | - 15 of 94 | items | | |
| | THERMAL UNDE | RWEAR "TOPS | 8. BOTTOMS" Me | 's Circular | | \$8.83USD | / each | Add | | |
| | Supplier: <u>AMERIC</u> LSDBE: Supplier Part Num ETA (days): 30 | AN SUPPLY COMP | ANT | THERMAL UNDERWEAR "TOP'S & BOTTONS" Men's Circular Knit, Medium weight, sleeves shirt, crew neck with knit cuffs, full elastic waist drawer with knit anklet reinforced seams for longer wear, color cream, 50% polyester, 50% cotton, 4X LARGE | | | | | | |

16. Click the link on an item in the catalog.

< Back

The details for the item appear. Click Add to Favorites.

| Product Details: | |
|------------------------------------|------------------------------|
| | Quantity: 🛄 🔤 Add |
| Description: | Name Tags and Materials |
| Supplier; | GARDINER, KENYA & ASSOCIATES |
| Supplier Part Number: | 47 |
| Manufacturer: | |
| Contract Number: | |
| Manufacturer Part Number: | |
| ETA (days): | 5 |
| More Info on Supplier Website: | |
| More Info on Manufacturer Website: | |

Add to Favorites



17. The item is added as a favorite, which you can access directly from the Catalog page under the Favorites tab.

| Buyer* | Walcome Annette Tibbs last visit 5/24/2003 8:34 AM | | | | | | | | |
|--|---|-----------------------------------|-----------------------|-----------------------|------------------------------|---------------------|------------|--|--|
| | Home | Logoat | Preferences | Toggle Tips | Toggle Currency | Help | | | |
| Explore | Explore Ca | talog | | | | | | | |
| Saved Searches System Searches Cetalogs Folders | To locate an item to add to your request, plick a category or sub-category link, or enter a value in the search field and click Search to retrieve the list of valid values. You can also dick a page number to display the values that appear on that page, and then make your selection(s). | | | | | | | | |
| | Catalog Favo | orites Saved S | earthes | | | | | | |
| | | | | | | | | | |
| | Favorites all catalog item | low you to save o detail page. | ornmanly ordered iter | ns. Add an item to yo | ur favorites folder by click | ing Add to Favorite | s on the | | |
| | | | | | | | | | |
| | Product | | | | Supplier | | Price Unit | | |
| | T Sides (35mm | n) (per slide) | | | GARDINER, KENYA | A ASSOCIATES \$12 | 10USD each | | |
| | Budget Analy | st | | | BEALE, INC. | \$75 | 68USD hour | | |
| | a lade num | Damain from 1 | | | | | | | |
| | - Hall Comme | K BINGY BING THE T | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | ights Reserved. | | | | | | | |
| | | | | Support | | | | | |
| | | | | | | | | | |

18. Click Folders in the Process Step Area.

The Explore Folders screen appears. Take note of the PASS folders already available and the Personal folders that can be created.





19. Click New Folder to create new folder.

The Create New Folder screen appears. Select a title that will fit your needs. Click OK to generate the new folder. The new folder is now listed under your Personal Folders. You have the option to rename it, move it or delete it.

| Buyer | Welcome Tibbs, Annetts Test visit 6/12/2003 9:05 PM | | | | | | | |
|-------|---|---|---|--|---|--|--------------------|--|
| | Home | Logout | Preferences | Toggle Tips | Toggle Currency | Help | | |
| | Create New | Folder | | | | | | |
| | Enter a nam You can play | is for the new fok ce folders within f | der, and indicate whe olders, however, ned | re it belongs in relatio ting folders more that | n to your existing folders. (a few levels deep may ma | Sick OK to proste the ne ke it difficult to locate it | en folder: ems. | |
| | New folder name: | | | | | | | |
| | Parent folder: | | | | | | | |
| | 🕫 🛄 All Folder | re | | | | | | |
| | OK Cancel | 0 | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

20. Click Status Items in the Process Step Area for Personal Folders.

All of the requisitions are displayed. Click I next to the Move to Folder field to select your newly created Personal Folder. Select the folder you just created, and then click OK.

| Buyer- | Welcome Annette | Tibbs last visit | 5/14/2003 2:51 PM | | | | |
|--------|---|----------------------------|------------------------|-----------------------|-----------------------|------|--|
| | Herea | Legent | Professions | Taggle Tips | Trepple Currency | Halp | |
| | Choose Fold | ler | | | | | |
| | Click a radio (| outton to select (| the folder to which ye | ru Hould like to move | the selected item(s). | | |
| | C Status Iter C Approve 3t C Reconcile 1 C Archave 3te | ne erne terns rme | | | | | |
| | CK Cancel | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |



21. Select one of your requisitions and select the option to Add Instead of Move. Click Move to Folder to add requisitions to your personal folder.

> The Confirm Move to Folder screen appears. Click OK to confirm move. You are returned to the View Folders screen. You can continue to organize your items into folders from this screen.

| Buyer | Wolcome Tibbr, Annette Tast visit 6/12/2003 9:05 PN | | | | | | |
|-------|---|--|---|--|--|---|-------------------------------|
| | Home | Logout | Preferences | Toggle Tips | Toggle Currency | Help | |
| | Confirm Me | ove to Fold | er | | | | |
| | Click OK to you do not | move the selected want to see this of | f requests to the des onfirmation in the fut | ignated folder, or Can are, check the check t | icel to cancel the move an iox below. | f return to the previous | page, tf |
| | You have chose will be moved to moved to the Ar | n to move the se o the selected fol rchive Items fol | alected request(s) (Ider in that partitio der automatically. | to the designated fo n. If the folder you s | ider. Any request that w elect does not exist in th | as created in a diffen hat partition, the requ | ant partition lest will be |
| | OK Cance | | | | | | |
| | Don't show thi | is page again. | | | | | |
| | | | | | | | |



Guided Practice 7.2 - Create a basic report

1. Select Standard Reports under Report section of the PASS main home page. The Select Report Category screen appears.

Note there are step-by-step procedures for creating a report, much like creating a requisition. Select a category and click Next.



2. The Select Report screen appears. These are all the reports available within the category you have chosen. Select a report and click Next.





3. The Select Report Filters screen appears. You will need to add parameters for your report.

| Buyer | Welcome Tibbe, Asnette last vi | eè 6/12/2013 9:15 PM | | | | |
|---------------------|--|-----------------------------|----------------------|-----------------------------|--------------------------|----------|
| | Home Logost | Proferences | Togale Tips | Toggle Carrency | Help | |
| Reports | 3 Select Report Fi | Iters | | | e Praz Nait | * But |
| 🚺 Belect Category 🛩 | Use report filters to limit yo includes all volues. | ur report results to a port | isular person, statu | s, or time frame. If you do | an't apecify a value, fi | e report |
| 🕄 Salect Filters 🖌 | Report Farmeis HTML + | | | | | |
| A Bat-Raport | Eifur Name | Value | | | | |
| ave.Report | On Bahalf Of. | Tbts, Amette | | | | |
| | Supplier Name: | (select a volue) 🚺 | | | | |
| | Cammodity Code: | (nelect e value) | | | | |
| | Date Submitted: | This Quarter . | from: Tue, 1 | Aar, 2003 To: Mon. 31 | 3un, 2003 | |
| | Status: | Ro Chaice | | | | |
| | | | | | | |
| | | | | | S Prer Hest | * Evit |
| | | | | | | |
| | | | | | | |

- 4.Click 🗈 to access the each of the values next to the fields.
- 5. Click Next to proceed to the Run Report screen.

| Buyer" | Welcome Tibbs, A | Annette Tast visit | 6/12/2003 9:05 PM | | | | * * * |
|--|--|--------------------------------------|--|-----------------------|-----------------|---------------|-------|
| | Home | Logout | Preferences | Toggle Tips | Toggie Currency | Help | |
| Reports | 4 Run Re | port | | | | × Preu Bast 5 | Exte |
| <u>Select Category</u> ✓ <u>Select Report</u> ✓ | Click Run Re | port to generate | e the report. | | | | |
| Select Filters 🖌 | Report Filters: On (between Tue, 1 A | Behalf of = Tibbs pr, 2003 and No | , Annette, Date Sub n, 30 Jun, 2003) | mitted = This Quarter | | | |
| Eave Report | <u>Run Report</u> | | | | | | |
| | | | | | | < Preu Rest > | 50H |



6. Click the Run Report link.

The report appears in a new window. This is a report that has been run in html format. Close report window and make PASS window active.

District of Columbia Supplier Details On Behalf Of – Tibbs, Annette, Date Submitted – This Quarter (between Tue, 1 Apr, 2003 and Mon, 30 Jun, 2003) Fri, 13 Jun, 2003



Supplier: LASER ART, INC.

LOOBE: Yes

Commodity: 6208100 Pan Refills (General Writing Types): Ball Point, Nylon Typ, Plastic Typ, etc.

| Requisition No.: RG100480 | | | | | |
|-------------------------------|--------------------|-----|------|------------|----------------|
| Description | Contract ID | Oty | UOM | Unit Price | Extended Price |
| REFILL FARASER, PENSTYLE 2/PK | PODS-2003-C-015-01 | 15 | each | \$1.04USD | 315.00030 |
| Requisition No. total | | | | | \$15.60USD |
| Commodity total | | | | | \$15 EDUSD |
| Supplier total | | | | | \$15.60050 |
| Supplier: THE AD AGENCY | | | | | |
| 150BE Yex | | | | | |



7. Click Next to proceed to the Save report screen. Click Save to save report.

| Buyer | Welcome Tibbs, | Annette last visit | 6/12/2003 9:05 FM | | | | * * * |
|--|-----------------|--------------------|----------------------|-----------------------|-----------------------------|--------------------------|-------|
| | Heme | Legeut | Preferences | Toggle Tips | Toggle Currency | Help | |
| Reports | Save R | eport | | | | C Preu | Exit |
| O Select Category ✓ O Select Report ✓ | Enter a uniqu | ue name for your | report and click Sav | e. You can access the | report in the future from y | rour Saved Reports list. | |
| Select Filters ✓ | Save Report as: | Supplier run | | Save | | | |
| 🗖 Save Report 🛛 🗸 | | | | | | | |
| | | | | | | e Prov | Exit |





Individual Exercise 7.1 - Creating a standard report

Objective(s): Create a new report.

Duration : 20 minutes

Instructions:

Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

| Step | Activity | Completed |
|------|--|-----------|
| 1 | Log into PASS. | |
| 2 | Click on Standard reports. | |
| 3 | Select Orders as the report category. | |
| 4 | Select Order Summary by LSDBE Supplier. | |
| 5 | Select the Yes radio button next to LSDBE. | |
| 6 | Run report. | |
| 7 | Title Report. | |
| 9 | Save Report. | |



Guided Practice 8.1 - Changing Personal Profile Information

1. Log in to the PASS and select Create on the Swoosh



2. Select Company eForm. On the next screen, select User Maintenance Form.

The Create Request Using Company eForm screen appears. The structure of the eForm is similar to requisitions. To complete the eForm, follow the step-by-step wizard

| Buyer- | Welcome Tibls, Annette last visit 6/13/2003 9:20 AM | | | | | | | | | | | |
|--------|--|---|-------------|-------------|-----------------|------|--|--|--|--|--|--|
| | Bome | Logost | Preferences | Toggle Tips | Toggle Currency | Help | | | | | | |
| | Create Req | Select the desired form to preate your request, or enter the name of the form you want to use in the search field, and click Search retrieve the forms that match your search criterie. | | | | | | | | | | |
| | Select the desired form to preste your request, or enter the name of the form you want to use in the search field, and clip retrieve the forms that metch your search criteria. | | | | | | | | | | | |
| | Г | Search | | | | | | | | | | |
| | What would y | ou like to cre | ate? | | | | | | | | | |
| | • User Naintena | nce Request | | | | | | | | | | |



3. Add title to User Maintenance eform



4. Select Maintain radio button.

The User field defaults to the person logged in. You are able to send changes to another user's profile but that person will be in the approval flow to ensure that changes are not made without his/her permission.



Note: Add indicates that you are adding a new PASS user.

Delete indicates that you are deactivating a PASS user.



5. If the request is on behalf of someone, you may use the \square button to select another user within your agency.

| Buyer | Welcome Tibbs, Annette last visit 6/13/2003 9:20 AM | | | | | | |
|--|---|--|---|---|--|--|--|
| | Home | Logost Pederonces | Toggle Tips Toggle Currency H | felp | | | |
| lew Company eForm | Choose Value | for User | | Cancel | | | |
| Title Consuleta Form Justifz | Click Select to containing that t | idd that value to your request, or i ext. You can also click a page num | ppe a value in the search field and click Search to retriber to display the values that appear on that page, and | ieve a list of values then make your selection | | | |
| AREAL FLORE | rate period | 22.0 | | Page 1 ∉ ⊧ | | | |
| Summary | Name | E-mail Address | Default Ship To | Action | | | |
| | Aldridge, James | james aldridge@dc.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIRS | Select | | | |
| | Alford, Hermetta | hermetta.alford@dc.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIRS | Salact | | | |
| | Allen, Gwen | gviendolyn allen@do.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIRS | Select | | | |
| | Aspero, Ben | ben.aspero@do.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIRS | Select | | | |
| | Banks, Ruth | ruth.banks@do.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIRS | Salact | | | |
| | Boyles, Pancheta | pancheta boyles@do.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIRS | Salect | | | |

6. Click Next. The User Maintenance Request screen appears.

On the left side, you can view all the current values of your profile. On the right side, you can change the values to your profile. Some fields offer a pull-down or chooser (+) option, while others are free form text.

| Buyer | Weicome Tibbs, Annette - last visit 6/13/2003 9:20 AM | | | | | * * * | |
|-------------------|---|-------------------------------------|-----------------------|-----------------|------------------|----------------|------|
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| New Company eForm | 2 User Ma | intenance | Request | | I Preu | Hest > Bummary | Evit |
| <u>■ 181e</u> | User Maintenance R Changing profile info | equest UM32 primation | | | | | |
| Complete Form | Fill out the form | m. When you are | dane, side Next to so | ntinue. | | | |
| Summary | Complete Form | User Maintena | nce Request | | | | |
| | la preserve | Current Value | | | 1000401 | Change To: | _ |
| | Logini | ations | | | Lagin: | L | |
| | SOAR Login : | TSCRAT | | | SOAR Login | | |
| | Benk ID; | | | | Bank ID: | | |
| | Full Name: | Name: Tibbs, Annette : Scheduler | Full Name: | [| 2 | | |
| | Title: | | Title: | 1 | | | |
| | Deliver To: | Annette Tibbs | | | Della State | · | 1 |
| | Ship Ta: | DEPT. OF CONS | UMER AND REGULATO | BY AFFAIRS | Derver (b. | financial a | |
| | Supervisori | Little . E. Savare | nah | | Ship To: | (no varue) | |
| | ManagementLevel: | 7 (\$10,000.000 | so) | | Supervisor: | (na value) 🖃 🖬 | |
| | Email Address | annette tibbs@c | to gov | | NanagementLevel: | (no value) 💌 🗖 | |
| | Phone: | 2024429526 | 12 | | Email Address | | |
| | Fex: | 2024429451 | | | Phone | | 9 |
| | Agency: | CRO IDEPT, OF | CONSUMER AND REGU | LATORY AFFAIRS) | Faxi | | |



7. Select a Ship-To address by clicking the 🗳 proceeding the Ship to field.

In some cases, an agency may have only one Ship-To address. Others may have many.

| Buyer* | Welcome | Tibbs, Annette Tast visit | 6/13/2003 9:20 AM | | | | | |
|-----------------------------------|------------------|--|---|---|---|---------------------|----------------------------|-----------|
| | Home | Logout | Preferences | Toggie Tips Tog | pie Currency | Help | | |
| New Company eForm | Choose | e Value for Ship | То | | | | | Cancel |
| Complete Form | Click conta (s). | Select to add that value ining that text. You can i | ta yaur request, ar iso click a page nur | type a value in the rearch field doer to display the values that a | and dick Search to ppeer on that page, | retriave and the | a list of val make your | selection |
| Approval Flow | Field: 1D | Name | Search S | treet | City | State | Country | Action |
| Summery | CRO | DEPT. OF CONSUMER AN | D REGULATORY 9 | 41 NORTH CAPITOL STREET, N | WASHINGTON | DC | United States | Select |
| | CR0-01 | DEPT. OF CONSUMER AN | D REGULATORY 9 | 11 North Capitol Street, NE Suit | 8 Washington | DC | United States | Select |
| | CR0-02 | DEPT. OF CONSUMER AN AFFAIRS | D REGULATORY Q | 41 N. Capitol Street NE Suite 23 | 00 Washington | DC | United States | Select |
| | | | | | | | | Connel |

8. Select a Supervisor by clicking the 🗄 proceeding the Supervisor field.

Due to a promotion, the User may have changed Supervisor. The Choose Value for Supervisor allows you to select another Supervisor within your agency.

| Buyer* | Welcome Tibbs, Ann | ette last visit 6/13/2003 9:20 AM | | |
|--------------------------------|---|---|--|---|
| | Harne | Logost Preferences | Toggle Tips Toggle Currency | Help |
| New Company eForm | Choose Value | for Supervisor | | Cancel |
| O lītis ✓ O Campiete form ✓ | Click Select to containing that to (s). | add that value to your request, or ext. You can also dick a page num | type a value in the search field and click Search to re ber to disclay the values that appear on that page, an | strieve a list of values id then make your selection |
| O Justifi O Alloroval Flow | Field: Name | | arch | Page 1 ⊴ ⊧ |
| Summary | Name | E-mail Address | Default Ship To | Action |
| | Aldridge, James | james,aldridge⊜dc.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIR | Select Select |
| | Alford, Harmatta | hermetta.eFord@dc.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIR | Belett |
| | Alen, Grien | gmandolyn,allan@dc.gov | DEPT. OF CONSUMER AND REGULATORY APPAIR | ts Sulect |
| | Aspera, Ben | ben.aspera@idc.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIR | Select: |
| | Banks, Ruth | ruth.banks@ds.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIR | Salect Salect |
| | Boyles, Pancheta | pancheta.boyles@dc.gov | DEPT. OF CONSUMER AND REGULATORY AFFAIR | Select. |
| | Bridges, Conred | conrad.bridges≣dc.gov | DEPT. OF CONSUMER AND REGULATORY APPAIR | Select : |



9. Select a Management Level

Management Levels are monetary thresholds that are associated with your profile. Most Users will have a management level of 9, which indicates that every purchase made will have at least one approver (usually the User's supervisor).

| Buyer | Welcome Tibbs, 6 | Amontte : last visit | 6/13/2003 9:20 AM | | | | * * * |
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| | Home | Logout | Profeseres | Toggle Tips | Toggie Carrency | Help | |
| New Company eForm | Choose Val | ue for Man | agementLeve | el | | | Cancel |
| 📢 Idla 🗸 | m Click Select | to add that value | ta your request, or t | ype a value in the se | arch field and click Search | to retrieve a list of value | |
| 🙆 Complete Form 🖌 | (a). | at text. You can a | also olick a page num | ber to display the val | ues that appear on that pag | e, and then make your s | election |
| a Lutify | Field: Name | × | Sear | di j | | | |
| | Name | 1 | | | | ApprovalLimit | Action |
| Summary | 1 | | | | | \$1,000,000,000.00USD | Select |
| | 2 | | | | | \$1,000,000,000.00USD | Select |
| | 1 | | | | | \$1,000,000,000.00USD | Select |
| | 4 | | | | | \$500,000.00USD | Select |
| | 5 | | | | | \$100,000.00USD | Select |
| | 6 | | | | | \$25,000.00USD | Select |
| | 7 | | | | | \$10,000.00USD | Select |
| | 8 | | | | | \$2,500.00USD | Select |
| | 9 | | | | | \$0.00USD | Select |
| | | | | | | | Cancel |

10. Change your Fax Number using free-form text, then click the Next button.

The Justify Request screen appears where you can provide justification comments. You can also attach files to justify the changes to your profile.

| Buyer ** | Welcome Tibbs, A | onette last visit | 6/13/2003 9:20 AM | | | | |
|--------------------------------------|--|---------------------------------------|-------------------------------|------------------------|-----------------------------|--------------------------|-------|
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| New Company eForm | 3 Justify | User Main | tenance Req | uest | < Dres | Next > Summary | Exit |
| 1 lits × 2 <u>Complete Form</u> × | User Maintenance P Changing profile inf | equest UN32 formation | | | | | |
| 🚯 Justify 🖌 🖌 | Your company supporting do | y may require yo cument, if desire | su ta justify your req rd. | uest. If necessary, an | ber your justification comm | nente below. You can att | ach e |
| Approval Fism | Comments - Ent | ire User Mainte | nance Request | 2 | | | |
| | | | Add Attachm | ent Dekte | < Pres | Next > Summary | Esit |



11. Review approval flow.

Like the requisition process, user profile changes need to go through approvals to ensure that information is accurate and legitimate. Note the HR Manager is a Watcher and will receive your changes for informational purposes.

| Buyer - | Welcome Tibbs, Ann | ette last visit 6/13/ | 2003 9:20 AM | | | |
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| | Harris | Logost | Preferences | Toggle Tips | Toggle Currency | Help |
| New Company eForm | 4 Approva | Flow | | | | Prev Nant > Sur |
| 🚺 Iitla 🖌 | User Maintenance Res Changing profile infor | quest UM32 mation | | | | |
| Justify 🗸 | i The approval flo | in diagram shows w | the needs to approve yo | iur request. You can add | approvers or delete them fro | m your request. |
| Summary | Approval Flow - U | ser Maintenance F | Request | | | |
| | Legend: Perdir UMS2 | CROHE Manage | Approved Demied | 1 Optional | SOAR DisbittS | ecurity Manager - |
| | Add Approver | | | | | Prev Havt > Bur |

12. Review the summary details.

When you are ready, press the Submit button to send your request for approval.

| Buyer* | Welcome Tibbs, Annel | te Tastivisit 6/ | 13/2003 9120 AM | | | | |
|--|--|--|---|---|--|------------------------------------|---------|
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| New Company eForm | Summary | | | | S Pres | Heat > Submit | 1×8 |
| Consists Form Consists Form Consists Form Constraint Constrat Constraint Constrai | Changing profile inform This is a summary step to change the Porm Approval No Title - Liser Mainton Title : | ent UM32 ation of your comp- information. V m mance Request Chatging rate C add | any request form. When you are first | Review the informatio red, dick Submit to s | n to be sure it is correct. ubmit the request for app | rou can go back to any pr roval | revious |
| | Maintenence Selector: Useri Complete Form - Us Cr Logini 65 | Nantan Delete Tibbs, Annett er Maintenan unrent Values: bbs | ce Request | | Login: | Change Tec | - |



Individual Exercise 8.1 - Customizing User

Settings

Objective(s): Delegate your approval authority for 2 weeks.

Duration:

20 minutes

Instructions:

Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

| Step | Activity | Completed |
|------|--|-----------|
| 1 | Log into PASS. | |
| 2 | Select Preferences. | |
| 3 | Select Delegate Approval Authority. | |
| 4 | Choose a user as a delegate. | |
| 5 | Select a delegation start date next month. | |
| 6 | Select a delegation end date of 2 weeks after your start date. | |
| 7 | Select to be notified via email. | |
| 8 | Click Next. | |
| 9 | Click Submit. | |