Purchasing Agency Requesters and Buyers
Navigating this Course

The following buttons will help you navigate through the training:

» To go forward to the next slide

← To go backward to the previous slide

Note: You will not be able to move to the next slide until you click all the interactive elements and buttons on the screens.
Welcome to the Purchasing course! I am Paula Purchase and I will be your guide today.

Let us begin with the course agenda.

**Course Introduction**

Lesson 1: Overview of Purchasing
Lesson 2: Manage Purchasing
Lesson 3: Run Procurement Reports
Lesson 4: The Buyer WorkCenter
Course Summary and Assessment
This Web-Based Training (WBT) course introduces the purchasing processes in SHARE FIN 9.2. It provides the steps to navigate through the Purchasing module sections and introduces you to the various functionalities under each section.

This course takes approximately 60 minutes to complete. You must take the final assessment at the end and score at least 80% to receive credit for this course.
Course Introduction

This Web-Based Training (WBT) course introduces the purchasing processes in SHARE FIN 9.2. It provides the steps to navigate through the Purchasing module sections and introduces you to the various functionalities under each section.

This course provides information on the Purchasing module in SHARE FIN 9.2 and is applicable for all purchasing users.
This Web-Based Training (WBT) course introduces the purchasing processes in SHARE FIN 9.2. It provides the steps to navigate through the Purchasing module sections and introduces you to the various functionalities under each section.

Upon completion of this course, you should be able to:

- Define key terms associated with the Purchasing module
- Provide an overview of the purchasing business processes
- Manage purchasing
- Run procurement reports
- Explain key features of the Buyer WorkCenter in SHARE FIN 9.2
Agenda

Course Introduction

Lesson 1: Overview of Purchasing

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Course Summary and Assessment
Overview of Purchasing

By the end of this lesson, you will be able to:

- Identify purchasing functions and key terms
- Navigate to the Purchasing module
- Describe changes to purchasing transactions in SHARE FIN 9.2
Key Terms

Take a moment to familiarize yourself with the key terms used through the course. *Click each button to learn about the key terms*

- **Procurement Contract**: A Procurement Contract is a legally binding agreement between a supplier of products and services and a purchaser.
- **Requisition**
- **Purchase Order**
- **File Attachments**
- **Requisition/PO Workflow**
Take a moment to familiarize yourself with the key terms used through the course.

*Click each button to learn about the key terms*

**Procurement Contract**

**Requisition**

**Purchase Order**

**File Attachments**

**Requisition/PO Workflow**

A Requisition identifies materials/services to be sourced and indicates where to charge the cost. It starts the process to procure specific quantities of a good or service within a determined time frame. The requisition is a pre-encumbrance.
A Purchase Order (PO) is a document issued by the state purchasing agent or a central purchasing office that directs a contractor to deliver items of tangible personal property, services or construction.
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

*Click each button to learn about the key terms*

- **Procurement Contract**
- **Requisition**
- **Purchase Order**
- **File Attachments**
- **Requisition/PO Workflow**

File Attachments are supporting documents such as requests for quotes (RFQs) or price agreements that can be attached to a requisition or a purchase order.
Key Terms

Take a moment to familiarize yourself with the key terms used through the course.

Click each button to learn about the key terms

- Procurement Contract
- Requisition
- Purchase Order
- File Attachments
- Requisition/PO Workflow

The Requisition/Purchase Order Workflow allows users to route requisitions/purchase orders to the appropriate parties for approval.
SHARE FIN 9.2 delivers improved functionality to integrate key financial processes and provides greater accuracy in budgeting and reporting. The chart below shows an example of how the Purchasing module integrates with other SHARE FIN modules.
SHARE FIN 9.2 allows you to manage purchasing by identifying, sourcing, and receiving materials and services in the Purchasing module.

Click > NavBar > Navigator > Purchasing
Purchaseing

Below is a summary of the purchasing processes in SHARE FIN 9.2.

- Create a Procurement Contract
- Approve Contract
- Create a Requisition
- Requisition Approval Workflow

- Create a Purchase Order
- PO Approval Workflow
- Dispatch Purchase Order

Not all agencies require an approved procurement contract or a requisition to create a PO.
Purchasing

Below is a summary of the purchasing processes in SHARE FIN 9.2.

*Hover your mouse over each box to learn more.*

1. Create a Procurement Contract
2. Approve Contract
3. Create a Requisition
4. Requisition Approval Workflow
5. Create a Purchase Order
6. PO Approval Workflow
7. Dispatch Purchase Order

**Note:** This process may be different according to your agency's business process. For example, not all agencies require an approved procurement contract or a requisition to create a PO.
Purchasing

Below is a summary of the purchasing processes in SHARE FIN 9.2.

*Hover your mouse over each box to learn more.*

1. **Create a Procurement Contract** → **Approve Contract** → **Create a Requisition** → **Requisition Approval Workflow**

   - **Create a Purchase Order** → **PO Approval Workflow** → **Dispatch Purchase Order**

In order to procure products or services, users create a procurement contract with the supplier. Please note that not all agencies use procurement contracts.
Purchasing

Below is a summary of the purchasing processes in SHARE FIN 9.2.

*Hover your mouse over each box to learn more.*

In this part of the process, approvers approve the procurement contract so it can be used to create requisitions and purchase orders.
Below is a summary of the purchasing processes in SHARE FIN 9.2.

Hover your mouse over each box to learn more.

Users create requisitions for procurement, which set aside a budget to procure the products or services defined in the requisition. Please note that not all agencies use requisitions.
Purchasing

Below is a summary of the purchasing processes in SHARE FIN 9.2.

*Hover your mouse over each box to learn more.*

All requisitions go through an approval workflow before they can be used to create purchase orders. This workflow is an agency process that does not require DFA approval.
Purchasing

Below is a summary of the purchasing processes in SHARE FIN 9.2.

Hover your mouse over each box to learn more.

Users create purchase orders for procurement. Purchase orders are the first official offer to the supplier and contain specific details about type, description, quantity and agreed prices for the desired products or services.
Below is a summary of the purchasing processes in SHARE FIN 9.2.

*Hover your mouse over each box to learn more.*

All purchase orders go through an approval workflow before they can be used to source products or services.
Purchasing

Below is a summary of the purchasing processes in SHARE FIN 9.2.

Hover your mouse over each box to learn more.

- Create a Procurement Contract
- Approve Contract
- Create a Requisition
- Requisition Approval Workflow

- Create a Purchase Order
- PO Approval Workflow
- Dispatch Purchase Order

The Dispatch Purchase Order process creates a downloadable PDF file for the PO. Users can print and send it to the supplier manually.
New Purchasing Features in SHARE FIN 9.2

The Purchasing module features in SHARE FIN 9.2 are:

What’s new?
- New Approval Workflow for requisitions and POs
- Users will be able to attach electronic files to requisitions and POs
- New Buyer WorkCenter to access day to day tasks easily
- Ability to create and maintain new versions of an existing procurement contract

What’s going away?
- The creation of zero dollar requisitions and purchase orders

What’s staying?
- Users will have access to all transactions needed to perform their daily tasks
Introducing: Enhanced Inquiry Roles in SHARE FIN 9.2

Now let’s take a look at one of the most important user access changes in the Purchasing module: The inquiry role.

- The inquiry role allows you to view transactional data within the module and run reports
- With this role, you can search for existing transactions and access the information you need for your day-to-day business activities
- In Purchasing, you can view existing procurement contracts, requisitions, purchase orders, PO accounting entries, and more
- Contact your CFO if you have questions about the inquiry role

**Note:** Look for inquiry role job aids on the SHARE Collaboration Center’s FIN Job Aids tab.
Overview of Purchasing Summary

In this lesson we learned:

✔ The key terms related to the Purchasing module in SHARE FIN 9.2

✔ How to navigate to the Purchasing section in SHARE FIN 9.2

✔ The purchasing process

✔ New Purchasing module features in SHARE FIN 9.2
Knowledge Check

Purchase orders are sent to suppliers electronically in SHARE FIN 9.2.

A True
B False
Knowledge Check

Purchase orders are sent to suppliers electronically in SHARE FIN 9.2.

A  True

B  False

Users can print POs during the dispatch process. However, they must be sent to the supplier manually.
Agenda

Course Introduction

Lesson 1: Overview of Purchasing

**Lesson 2: Manage Purchasing**

Lesson 3: Run Procurement Reports

Lesson 4: The Buyer WorkCenter

Course Summary and Assessment
Manage Purchasing

By the end of this lesson, you will be able to:

- Create new versions of an existing procurement contract
- Attach supporting documents while creating a purchase order
- Identify the fields that you need to populate while creating a purchase order
- Explain the new Purchase Order Approval Workflow
Purchasing Process

- Create a Procurement Contract
  - Approve Contract
  - Create a Requisition
  - Requisition Approval Workflow
  - Create a Purchase Order
    - PO Approval Workflow
    - Dispatch Purchase Order

Let’s create a procurement contract.

Note: If you use procurement contracts, you need to check if there is a master contract for a purchasing agreement on the SPD website to link to your procurement contract.
Create a Procurement Contract

My agency wants to hire an IT specialist to upgrade a computer system for a period of 2 months.

Let's create a procurement contract to source the services of an IT specialist.
Create a Procurement Contract

Navigate to the Add/Update Contracts section to create procurement contracts to source materials or services.

Click > NavBar > Navigator > Procurement Contracts > Add/Update Contracts

Note: You need an approval every time you create or update a procurement contract.
Create a Procurement Contract

SHARE FIN 9.2 allows you to attach supporting documents to a procurement contract. These supporting documents include:

- Quotes from suppliers
- Price Agreements
- Other necessary documents for approval, such as design specification of the product, quotes, policy exemptions, approval letters etc.

**Note:** Electronically attaching supporting documents leads to a quick turnaround of approvals by reducing the amount of inter-office mail.
Create a New Version of the Procurement Contract

After a month, we realized that we would need 2 more IT specialist to upgrade the computer system for a period of 4 months.

Let’s create a new version (amendment) of the procurement contract. For reporting purposes, let’s link this contract to the related master contract.
Create a New Version of the Procurement Contract

Navigate to the Add/Update Contracts section to create a new version of the procurement contract.

Click > Navbar > Navigator > Procurement Contracts > Add/Update Contracts

Use this navigation path to create a new version of a procurement contract.
Let's get approval for the procurement contract.
Approve a Procurement Contract

The new version of the procurement contract needs to be approved before we can use it to source the services of IT specialists.

Let’s obtain the necessary approval for the contract in SHARE FIN 9.2.
Approve a Procurement Contract

A procurement contract needs to be approved before end users can reference it. The approver should be a different person than the requester.

Click > NavBar > Navigator > Procurement Contracts > Add/Update Contracts > Find an Existing Value

As an approver:
1. Enter the Contract ID.
2. Click the Search button.
3. Select the version to approve.
Approve a Procurement Contract

4. Change the **Status** of the procurement contract from **Open** to **Approved**.

5. Click **OK** on the Message dialog box.
Purchasing Process

Create a Procurement Contract → Approve Contract → Create a Requisition → Requisition Approval Workflow

Create a Purchase Order → PO Approval Workflow → Dispatch Purchase Order

TIP: You can choose a requisition name different from the requisition ID in SHARE FIN 9.2 to make tracking easier.

Note: You can create a requisition directly online or from a procurement contract. Not all agencies use procurement contracts and requisitions.
Create a Requisition

SHARE FIN 9.2 allows you to attach supporting documents to a requisition. These supporting documents include:

- Quotes from suppliers
- Price Agreements/Contract
- Other necessary documents for approval, such as design specification of the product, quotes, policy exemptions, approval letters etc.

**Note:** Electronically attaching supporting documents leads to a quick turnaround of approvals by reducing the amount of inter-office mail.

Access the Job Aids available on [SHARE Collaboration Center](#) to learn more about creating requisitions.
Let's look at the Requisition Approval Workflow.
Requisition Approval Workflow

There is a new Approval Workflow for requisitions in SHARE FIN 9.2. Below is an overview of the new approval process:

Requisition Routed for Agency Review → 1st level of Agency Review → Approve → 2nd Level of Agency Review → Approve → Requisition Approved

- Deny → Request Routed to Original Requester

Here is what you need to remember about the Requisition Approval Workflow:

- The 1st level of agency review is the requester’s supervisor
- Agencies assign the second level of agency review
- The person who denies a requisition must add comments. These comments will be visible to the requester.
- The requisition is routed back to the original requestor if denied at any stage of the process
- The requester receives an e-mail notification if a requisition is denied
- You do not need to populate the Department ID to initiate the Approval Workflow
Let's create a purchase order.

**Note:** You can create a purchase order directly online or from a requisition. All agencies use purchase orders.
Create a Purchase Order

Let’s create a purchase order to buy A4 size paper from a supplier.

Creating a purchase order encumbers the funds for the purchase.
Create a Purchase Order

SHARE FIN 9.2 allows you to attach supporting documents to a PO. These supporting documents include:

- Quotes from suppliers
- Price Agreements/Contract
- Other necessary documents for approval, such as design specification of the product, quotes, policy exemptions, approval letters etc.

**Note:** Attaching supporting documents leads to a quick turnaround of approvals by reducing the amount of inter-office mail.
Create a Purchase Order

Navigate to the Add/Update POs section to create a PO.

Click > NavBar > Navigator > Purchasing > Purchase Orders > Add/Update POs

Use this navigation path to create a PO.
Purchasing Process

Create a Procurement Contract → Approve Contract → Create a Requisition → Requisition Approval Workflow

Create a Purchase Order → PO Approval Workflow → Dispatch Purchase Order

Let’s look at the PO Approval Workflow.
PO Approval Workflow

Let’s approve the PO in SHARE FIN 9.2.
There is a new Approval Workflow for purchase orders in SHARE FIN 9.2. Below is a view of the new approval process:

Note: The PO is routed back to the original requester if approval is denied at any stage of the process. You must select the right origin code for every PO as it defines the Approval Workflow process.
Here are the key points you need to remember about the PO Approval Workflow:

- The PO is routed back to the original requester if approval is denied at any stage of the process.
- The requester receives an e-mail notification if a PO is denied.
- The requester is the only person that gets the email notification. However, every level of approver can see the approvals history.
- You do not need to populate the Department ID to initiate the Approval Workflow.
- The 1st level of agency review is the requester’s supervisor.
- As an approver, you can approve multiple POs at once.
- If an approver is missing at any level, DFA has a process to address the issue. In exceptional circumstances, contact the DFA Help Desk.

Follow the navigation path below to view the approval status of a PO:

Click > NavBar > Navigator > Purchasing > Purchase Orders > Review PO Information > Purchase Orders.
PO Approval

SHARE FIN 9.2 allows you to approve, deny, or pushback POs.

Use this option to approve the PO. Once approved by the first level, the PO moves to the next level of approval.

Use this option to deny the PO. Once a PO is denied, it goes back to the original requester. The original requester can make the necessary edits and re-submit the PO for approval.

The push back option sends the PO one level back. For example, if level 2 approver clicks the Pushback button, the PO goes back to the level 1 approver.
Approve a Purchase Order

Navigate to the Approvals tile on the Homepage to approve a PO.

Note: The tiles that you see on the Homepage depend on your access in SHARE FIN 9.2.
Approve Multiple POs

SHARE FIN 9.2 allows you to approve, deny, or pushback multiple POs at the same time. Some users may have multiple POs which are submitted for their approval in a day. To avoid approving each PO individually, SHARE FIN 9.2 allows these users to approve, deny, or pushback multiple POs at the same time.

1. Click the Approvals tile on the Homepage
2. Click the Purchase Order button
3. Click the check-box to select all POs
4. Click the Approve, Deny or Pushback button depending upon your requirement

In case the POs are denied, the approver should mention the reason for denial in the Approver Comments box. This will help the requester make the required updates to the POs.
Re-submit Denied PO

I’ve just received an e-mail notification that my PO was denied.

Let’s look at why the PO was denied, make the required updates, and re-submit it for approval.
Re-submit Denied PO

If a PO is denied, it goes back to the original requester. The original requester can then edit the PO and re-submit for approval.

Navigate to the Add/Update POs section to re-submit a denied PO.

Click > NavBar > Navigator > Purchasing > Purchase Orders > Add/Update POs

Use this navigation path to re-submit a denied PO.
Purchasing Process

Let’s dispatch the purchase order.
Dispatch a Purchase Order

Let’s use the Dispatch PO process to print the approved PO.
Dispatch a Purchase Order

Navigate to the Dispatch Purchase Orders page to create a downloadable PDF file for the PO.

Click > NavBar > Navigator > Purchasing > Purchase Orders > Dispatch POs

Note: Users must send the printed PO to the supplier manually.
Manage Purchasing Summary

In this lesson we learned:

✓ How to create procurement contracts and purchase orders

✓ How to attach supporting documents to a purchase order

✓ The new Approval Workflow for requisitions and purchase orders
Knowledge Check

Paula created and submitted a PO for approval in SHARE FIN 9.2. How will Paula know if her PO is denied at any stage of the process?

A. Text Message
B. Automated Call
C. E-mail Notification
D. Verbal Communication from Approver
Paula created and submitted a PO for approval in SHARE FIN 9.2. How will Paula know if her PO is denied at any stage of the process?

A. Text Message
B. Automated Call
C. E-mail Notification
D. Verbal Communication from Approver

Paula will receive an e-mail notification if the PO is denied.
Agenda

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Course Summary and Assessment
Run Procurement Reports

By the end of this lesson, you will be able to:

- Identify useful procurement reports in SHARE FIN 9.2
Procurement Reports

The Purchasing module in SHARE FIN 9.2 contains the following useful reports.

*Click each report to learn more about it*

- PO Activity Summary
- Listing of Encumbrances
- Req and PO Budgetary Activity report
Procurement Reports

The Purchasing module in SHARE FIN 9.2 contains the following useful reports. *Click each report to learn more about it*

- **PO Activity Summary**
- **Listing of Encumbrances**
- **Req and PO Budgetary Activity report**

The PO Activity Summary report displays the receiving, invoicing, matching, and returning activities performed on selected purchase orders to date.

*Click > NavBar > Navigator > Purchasing > Purchase Orders> Review PO Information> Activity Summary*
Procurement Reports

The Purchasing module in SHARE FIN 9.2 contains the following useful reports. Click each report to learn more about it

- PO Activity Summary
- Listing of Encumbrances
- Req and PO Budgetary Activity report

The Listing of Encumbrances report provides budgetary amount information for purchase orders per department.

Click > NavBar > Navigator > Purchasing > Purchase Orders > Reports > Listing of Encumbrances
Procurement Reports

The Purchasing module in SHARE FIN 9.2 contains the following useful reports. *Click each report to learn more about it*

- **PO Activity Summary**
- **Listing of Encumbrances**
- **Req and PO Budgetary Activity report**

The Req and PO Budgetary Activity report provides budgetary amount information for requisitions and purchase orders.

Click > **NavBar** > **Navigator** > **Purchasing** > **Purchase Orders** > **Reports** > **Req and PO Budgetary Activity report**
Procurement Reports Catalog

For a full list of procurement reports, access the SHARE FIN 9.2 Reports Catalog. You can find it on the SHARE Collaboration Center’s FIN Job Aids tab.
Run Reports Summary

In this lesson we learned:

☑ An overview of useful purchasing reports in SHARE FIN 9.2
Knowledge Check

Which report should Paula use to view the transactions performed on the PO she created?

A. PO Activity Summary
B. Buyer Activity Summary
C. Listing of Encumbrances
D. Req/PO Budget Inquiry
Knowledge Check

Which report should Paula use to view the transactions performed on the PO she created?

A. PO Activity Summary
B. Buyer Activity Summary
C. Listing of Encumbrances
D. Req/PO Budget Inquiry

Paula can view the transactions performed on the PO she created on the PO Activity Summary report.
Agenda

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Course Summary and Assessment
The Buyer WorkCenter

By the end of this lesson, you will be able to:

- Explain the key features of the Buyer WorkCenter in SHARE FIN 9.2
The Buyer WorkCenter

WorkCenters provide a central area to access key components within SHARE FIN 9.2. They enable users to access various pages and perform daily tasks in one place, which reduces the time used to navigate through SHARE FIN 9.2.

Click > Navbar > Navigator > Purchasing > Buyer WorkCenter

Use this navigation path to access the Buyer WorkCenter
The Buyer WorkCenter

The Buyer WorkCenter contains two primary tabs: Main and Reports/Queries. *Click each tab to learn more.*
The Buyer WorkCenter

The Main tab contains two sections: My Work and Links.

1. **My Work**: This section gives a snapshot of pending action items and alerts.
2. **Links**: This section provides easy access to pages in SHARE FIN 9.2.
3. **Edit Filters**: This section allows users to setup appropriate filter values based on pending action items.

**Note**: If an item in the My Work section is not a blue clickable link, it means there are no pending transactions under the filter criteria.
The Buyer WorkCenter

The Reports/Queries tab contains two sections: Queries and Reports/Processes.

4. **Queries**: This section allows the user to run commonly accessed queries.

5. **Reports/Processes**: This section lists the various reports available to the user.

**Note**: The items that you see under the Reports/Queries tab depend on your access in SHARE FIN 9.2.
The Buyer WorkCenter Summary

In this lesson we learned:

- The Buyer WorkCenter provides a central area for users to access key pages, reports, and queries within SHARE FIN 9.2
- The Buyer WorkCenter contains two primary tabs: Main and Reports/Queries
Knowledge Check

Paula can view two tabs in the Buyer WorkCenter. The Main tab and the _________ tab.

A. My Work
B. Edit Filters
C. Dashboard
D. Reports/Queries
Knowledge Check

Paula can view two tabs in the Buyer WorkCenter. The Main tab and the \[\text{__________} \] tab.

A  My Work
B  Edit Filters
C  Dashboard
D  Reports/Queries

Paula can view two tabs in the Buyer WorkCenter, the Main tab and the Reports/Queries tab.
Agenda

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Course Summary and Assessment
Course Summary

In this course we learned:

- How to create new versions of an existing procurement contract
- How to attach supporting documents to a purchase order
- How to use the new Approval Workflow for requisitions and purchase orders
- How to access purchasing reports in SHARE FIN 9.2
- How to use the Buyer WorkCenter as a central area to access key pages, reports, and queries within SHARE FIN 9.2
Help is Available!

You have multiple resources available to answer your SHARE Financials questions and provide support.

1. Ask SHARE Financials experts in your agency
2. Navigate to the SHARE Collaboration Center Job Aids section
3. Look at the Q&A Forum in the SHARE Collaboration Center
4. Submit a helpdesk ticket to the DFA Help Desk
Congratulations!

You have successfully completed the Purchasing course.

You have to score at least 80% to pass the final assessment and receive credit for this course.

We recommend retaking the course if you do not pass the final assessment on your third attempt.

Ready to test your knowledge?