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CAPEX BUDGETING
Purchasing - Training Guide
April 2011

CAPEX Budgeting – Purchasing

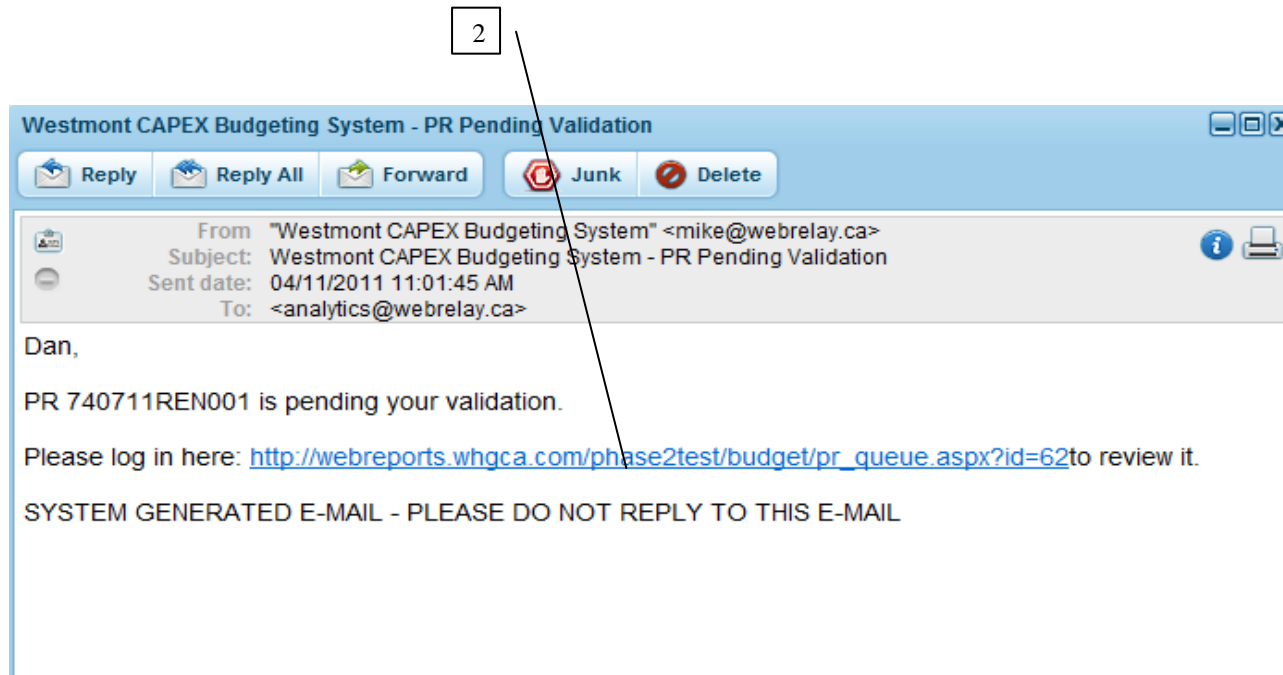## Validator/Purchasing Approval

1) Upon receiving an email notification of a pending PR, click on the link will bring you automatically to the PR
2) Click here to review the PR
3) *Note: If you are unable to click on the link – you can 'copy & paste' the link into your web browser address bar*

CAPEX Budgeting – Purchasing

Validator/Purchasing Approval

1) Click here to Submit the PR for approval once it has been reviewed
2) Click here to add an item to the PR
3) Click here to add a document to the PR (Word, Excel, PDF)
4) Click here to add a text note to the PR
5) Click here to edit a line item that already exists in the PR

Adding Items to a PR

1) To manually add items to the PR that were not included in the original Budget, close the Budget pop up (see #3 previous page)
2) Click here to add an item to the PR

2

PR QUEUE

Once you finish building this PR, click the Submit button to send it to the approval queue.   [Submit]

PR #	PR Name	Control #	Total
032811REN002	King Rooms	$10,000.00	$0.00

+ add item   + add document   + add note

Note	Created By	Date Created	System
PR created. Status: IN PROGRESS	Asset Manager - Duncan Purcell	14/04/2011	Y

Adding Items to a PR

1) Click here to select the Category you want to add the line item to
2) Start typing the name of the Inventory Item here (a smart filter will automatically make suggestions by searching the entire Inventory DB)
3) Click here to enter the number of rooms
4) Click here to enter the quantity of the item
5) Click here to select the unit of measure for the item
6) Click here to enter the cost of the unit (if you select an item already in the list, a default Cost will appear which can be edited)
7) Click here to Save your addition and return to the PR
8) Click here Close the window without saving the Inventory Item selection and return to the PR
9) *Note: If you have entered an Inventory Item that does not already exist, you will be asked to create a new Item (see next page)*

| 3 | 4 | 5 | 6 | 7 | 1 | 2 | 8 |

ADD PR ITEM   close

PR: 025311OPC001

Category: Administration

Inventory Item: Carpet Bo|

No. of Rooms: Carpet Border

Qty: 1

Unit of Measure: bed

	Total Cost	Approved PRs	Other PRs	Budgeted	Balance
Cost:					

Save »

Creating a New Inventory Item

1) If have typed the name for an Inventory Item that does not exist, a pop up will appear for you to fill in the Inventory Item details
2) Click here to select the GL Account to map the new Inventory Item to
3) Click here to select if Management Fees are applied to this item
4) Click here to Cancel and return to the PR
5) Click here to Save the new Inventory Item and return to the PR
6) Click here to Close the window and return to the Add Item window
7) *Important Note: A PR cannot be granted final Approval until the new Inventory Item has been approved by accounting or a BA/DCP. Email notifications are sent to the appropriate stakeholders to notify them of new Items to approve and to users when the item has been approved. In an emergency a system administrator can override the process and approve the item.*