Purchase Order Summary

It is important that all Orders are approved by month end. To determine which Orders have not been approved, you need to run the Purchase Order Summary process. Step-by-step procedures are listed below:

- Select (field office) PO Inquiry from the STARS list of responsibilities.
- Double click on Purchase Orders
- Double click on Purchase Order Summary
- Click on the Status tab in the middle of the screen
- Click on Order Approval and click on "In Process"
- Click on Headers in the lower right corner of the screen
- Click on Ship To and select appropriate location
- Click Find at the bottom right corner of the screen
- Click on Folder
- Click on Open
- Click on PO Header and click OK.
- To export the file to a spreadsheet to review, click on File and click on Export.
- Click Open and the spreadsheet will appear on the screen.
- At this point, you may manipulate the file any way you want to.
- Review the orders that pertain to your office.
- Repeat the steps above for the following status codes:
    - Incomplete
    - Pre-Approved
    - Rejected
    - Requires Re-approval

Take the necessary steps to get the orders out of the above status codes. The only valid status code at month end is Approved. Please reference http://stars1.energy.gov/stars_ref/, Purchasing, Reference Documents, Using the Notifications Window, Viewing Notifications from a Web Browser for instructions on how to get orders out of these status codes. If you have any questions, please contract the Help Desk at 301-903-2500.

Shirley Barker
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