

# Purchasing — Learning Path

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*Learning Paths > Purchasing*

This learning path is for purchasing team members who need to navigate the Purchasing app confidently. You will learn how to enter the app, use the purchasing list to locate existing work, open the new-purchasing workflow when starting new work, and use the available views to support routine review activities.

### Learning objectives

- By the end of this path you can open the Purchasing workspace and identify the available purchasing entry points.
- By the end of this path you can use the purchasing list view to review existing purchasing work.
- By the end of this path you can begin a new purchasing item from the new-purchasing screen.
- By the end of this path you can choose the appropriate Purchasing screen for a review or new-work scenario.
- By the end of this path you can perform a basic periodic review of purchasing activity using the available list view.

### Prerequisites

- Access to the Purchasing app.
- Permission to open the Purchasing workspace, the purchasing list view, and the new-purchasing screen.
- Familiarity with your organization's purchasing process and the type of purchasing work you are responsible for.

### Module 1: Get started in Purchasing

Goal: Learn the purpose of the Purchasing workspace and how to move from the app landing screen to the available work areas.

### **Lesson 1.1: Open the Purchasing workspace**

When you need to begin purchasing work, first open the central workspace so you can orient yourself before selecting a specific task. Go to [Purchasing](#) and use it as your starting point for purchasing activities.

**Practice task:** Open [Purchasing](#) and identify it as your starting workspace for purchasing work.

### **Lesson 1.2: Recognize review and creation entry points**

When deciding whether to review existing work or begin new work, distinguish between the available list-view and new-purchasing destinations. From [Purchasing](#), use the list-view destination when your goal is to review existing purchasing activity, and use the new-work destination when your goal is to start a new purchasing item.

**Practice task:** From [Purchasing](#), open both and , then return to the workspace.

## **Module 2: Perform daily purchasing work**

Goal: Use the correct screen for reviewing current purchasing work and beginning new work.

### **Lesson 2.1: Review existing purchasing work**

When a colleague asks you to check current purchasing activity, begin with the list view rather than starting a new item. Open to access the available purchasing list and review the existing work presented there.

**Practice task:** Open and review the purchasing items available in the list.

### **Lesson 2.2: Begin a new purchasing item**

When you need to initiate purchasing work that does not yet exist in the list, open the new-purchasing screen. Go to to begin the new-item workflow, using your organization's purchasing requirements to determine the information to provide.

**Practice task:** Open and identify it as the screen to use when beginning a new purchasing item.

### **Lesson 2.3: Choose the right starting screen for the task**

A common daily decision is whether the work already exists or must be initiated. If you are checking, reviewing, or locating existing activity, start in . If you are initiating new activity, start in . Return to [Purchasing](#) whenever you need to reorient yourself in the app.

**Practice task:** For one existing-work scenario and one new-work scenario from your role, state which of the two screens you would open first.

## Module 3: Support ongoing review and workload management

Goal: Apply the Purchasing workspace and list view to regular review routines.

### Lesson 3.1: Conduct a routine purchasing review

When performing a regular review of purchasing activity, use the list view as the basis for your review. Open , review the available items, and use your team's established process to determine whether follow-up is needed.

**Practice task:** Open and complete a review of the items visible to you.

### Lesson 3.2: Move from review to new work when needed

During a review, you may determine that a new purchasing item needs to be started. Begin in to review the current work, then open when your task is to initiate a new item rather than continue reviewing existing activity.

**Practice task:** Open , then navigate to as though you had identified a need for new purchasing work.

### Lesson 3.3: Use the workspace as a consistent return point

When you finish a review or leave the new-item workflow, return to the central workspace to begin your next task. Use [Purchasing](#) as the consistent app-level entry point, then select or based on what you need to do next.

**Practice task:** Return to [Purchasing](#) and choose the appropriate next screen for a task you expect to perform this week.

## Final assessment

1. You need to check whether purchasing work is already present before taking further action. Which screen should you open first?

2. You have determined that a purchasing item needs to be initiated and it does not already exist. Which screen should you use?
3. You have just opened the Purchasing app and are not yet sure whether your task is a review or new-work task. Where should you start?
4. During a routine review, you identify a need to begin separate new purchasing work. What is the appropriate sequence of screens?
5. A teammate says, “I need to see what purchasing work is currently available to me.” Which screen do you direct them to, and why?

## Answers

1. — It is the available list-view destination for reviewing existing purchasing work.
2. — It is the available screen for beginning new purchasing work.
3. **Purchasing** — It is the central Purchasing workspace and a suitable starting point for choosing the next task.
4. , then — Review current work first, then move to the new-purchasing screen to initiate new work.
5. — The list view is the appropriate destination for reviewing the purchasing items currently available.