Purchase Orders – Section 6.0

This process will be used to create Purchase Orders from Requisitions.

Audience: Buyers

Additional Resources:
- Video (where applicable – insert link)
- Help Text (where applicable – insert link)
- GMHEC Website (where applicable – insert link)
- cheryl.foster@gmhec.org

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<th>Process Step &amp; Description</th>
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This process will be done when an electronic PO will not be automatically created in Oracle. Reasons for this manual input:
- Negotiation button not clicked on a non-catalog requisition
- Possible troubleshooting solution for a requisition stuck in Oracle

On the Purchase Orders home page, click on the Tasks Icon and choose “Process Requisitions"

Quick Tip! Always enable your pop-ups in Oracle.
Search for your requisition – you may need to remove the buyer name to conduct a full search. Or, if you know the requisition number, you may enter it in the requisition field.

Highlight the requisition and click “Add to Document Builder”

A pop-up will appear requesting more information to build your PO. Choose the following:
- Type: New Order
- Style: Purchase Order
- Currency: USD

Click “OK” when complete
To the right of the requisitions list is the summary of the Document Builder. Click “Create”.

Quick Tip! Make sure the mini arrow to the right of your requisition screen is clicked. Otherwise, your document builder will not appear.

The PO has been created and is ready to be edited. Click “OK”
6.2 Edit PO & Submit

A new page will up where you can review your purchasing information:

If you need to edit your account information, click the Distributions tab.

**IMPORTANT NOTE:**
Each line item carries its own distribution – if charges need to be modified, you will need to click on each line item and go to its distribution for changes.

Click the icon next to the PO charge account field.
The following pop-up will appear where you can make your account changes:

If you need to split your distributions, click on the split icon (looks like a wishbone!):

Your screen will now allow you to add more distributions:

After review/correcting/completing your PO, click the submit button in the top right-hand corner:

Quick Tip! Refer to your COA training or contact your school’s finance team for more information on Charge Accounts.
A pop-up will appear confirming that your PO was submitted for approval. However, if you did not change the total cost, your PO will be automatically approved.

**Confirmation**

The document [Purchase Order] GM-PO-1171 was submitted for approval.

OK

### 6.3 PO Communication

**Email through Oracle:**
- If an email for an ordering address in your supplier’s file, the PO will be sent to the corresponding email
  - **TBD on how to check if your email has gone through**

**Print Email/Fax/Mail PO:**
- To download a PDF copy of your PO, click “View PDF” from the PO page:

  ![View PDF]

  ![Actions]

  ![Done]

- Your PDF will download – here you can save and/or print your PDF to email from your own address, fax, or mail