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

<table>
<thead>
<tr>
<th>Process Step &amp; Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1 Process Requisitions to PO</td>
<td>If you forgot to click the “Negotiated” button when creating a requisition, below are the steps you will need to take to create your Purchase Order.</td>
</tr>
</tbody>
</table>

Navigation Path:
➢ Procurement → Purchase Orders

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”
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:
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.

Once your PO is created, the following approval flow takes place:

- **Goods/Services < $500.00**
  - Requisition Submitted
  - **PO Generated & Auto-Approved**

- **Goods/Services > $500.00**
  - Requisition Submitted
  - **PO Generated**
  - **PO goes out for approval**

If you created a change order by editing your PO, the PO will need re-approval if:
- The total amount increases over 10%; or,
- The total amount increases by more than or equal to $10,000

**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
  - You will need to follow-up with your supplier to determine if they received your PO

- **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
  - You will need to follow-up with your supplier to determine if they received your PO
If you are waiting for your Purchase Order to be approved, or need to know who your approver is, you can follow these steps to find this information:

**Navigation Path:**
➢ Procurement → Purchase Orders

Click the Tasks button

Choose “Manage Orders”

![Manage Orders menu]

In the search fields, enter your PO and click search

![Manage Orders search interface]

Your results will appear. Click on your PO

![Manage Orders search results]

A new page will pop up.
If your PO has not been approved, under Status it will say “Pending Approval”. Click on this link.

Purchase Order: GM-PO-1008

Main

General

Procurement BU: GMHEC BU
Requisitioning BU: GMHEC BU
Sold-to Legal Entity: Green Mountain Higher Education Consortium, Inc.
Bill-to BU: GMHEC BU
Order: GM-PO-1008
Status: Pending Approval
Funds Status: Warning
Buyer: Cheryl Foster (Cheryl Foster)
Creation Date: 28-Mar-2019

If your PO has been approved, under Status it will say “Open”. Click on this link.

Purchase Order: MD-PO-1004

Main

General

Procurement BU: MIDD BU
Requisitioning BU: MIDD BU
Sold-to Legal Entity: President and Fellows of Middlebury College Inc.
Bill-to BU: MIDD BU
Order: MD-PO-1004
Status: Open
Funds Status: Reserved
Buyer: Cheryl Foster (Cheryl Foster)
Creation Date: 08-Apr-2019

On the following page you will see a graph that says “Terms Stage”. These icons help determine what state your PO is in.

The glasses icon determines that a FYI notification was sent to this user/approver. No actions are necessary on a FYI notification.

The person icon determines that an Action notification was sent to this user/approver and requires this user to approve the PO.
Approval & Pending Approval Examples:

**Order Approved** – More than $500.00
Note that there’s a checkmark next to the approver’s name indicating approval. Below the approver’s name, there is also text stating that the PO has been approved.

- Requestor receives FYI notification
- PO has been approved
- Approver receives FYI notification
- Approver has taken action
- Actions/tasks have been completed

**Automatic Approval** – Less than $500.00
Note that the approver only received a FYI notification. The system auto-approved the order since it is less than $500.

- Requestor receives FYI notification
- PO has been approved
- Automated approval has taken place
- Actions/tasks have been completed

**Pending Approval** – Over or equal to $500.00
Note that the approver does not have a checkmark next to her name. There is no verbiage stating that any stage of this workflow has been approved.

- Requestor receives FYI notification
- Approver has not taken action

If you discover that your approver may not be the correct person, please check your EDORDA as you may have entered the wrong department or designation. If you think the EDORDA is correct, but the approver is wrong, please contact your local helpdesk.