

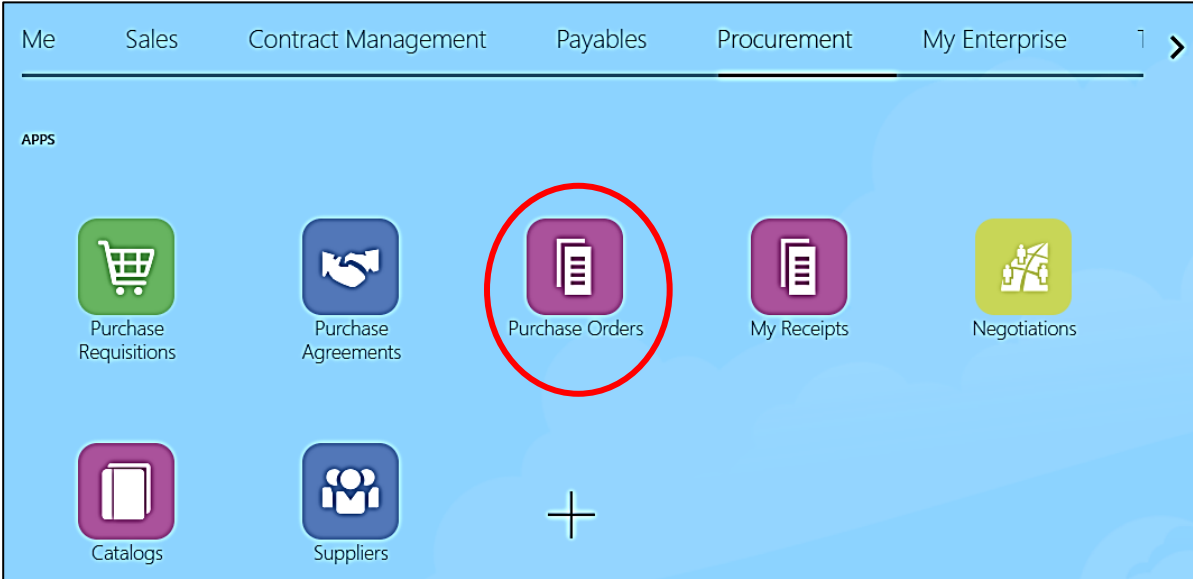
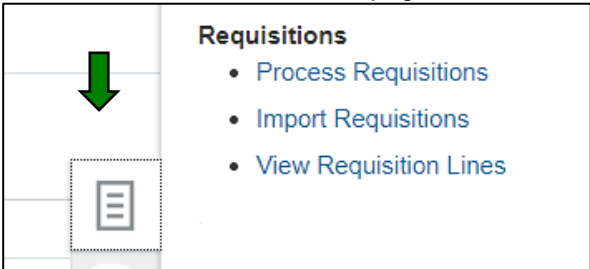
## Purchase Orders – Section 6.0

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

Process Step & Description	Action
<p><b>6.1 Process Requisitions to PO</b></p>	<p><i>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.</i></p> <p>Navigation Path:            &gt; Procurement → Purchase Orders</p> <p>This process will be done when an electronic PO will not be automatically created in Oracle. Reasons for this manual input:</p> <ul style="list-style-type: none"> <li>• Negotiation button not clicked on a non-catalog requisition</li> <li>• Possible troubleshooting solution for a requisition stuck in Oracle</li> </ul>  <p>On the Purchase Orders home page, click on the Tasks Icon and choose “Process Requisitions”</p>  <div data-bbox="1094 1661 1344 1793" style="border: 1px solid green; border-radius: 15px; padding: 5px; background-color: #e0f0e0;"> <p><b>Quick Tip!</b> Always enable your pop-ups in Oracle</p> </div>

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.

Process Requisitions Done

**Search** Advanced Manage Watchlist Saved Search All My Requisition Lines Requiring Action

\*\* Requisitioning BU  \*\* Deliver-to Location  \*\* At least one is required

\*\* Requisition  \*\* Category Name

\*\* Buyer  \*\* Item

Search Reset Save...

Highlight the requisition and click “Add to Document Builder”

Search Results: Requisition Lines

Actions View Format **Add to Document Builder** Return Reassign

Requisition	Line	Line Description	Requester	Quantity	UOM	Price	Amount	Currency
GM-REQ-1165	1	2019 Lamborghini. Cheryl please let me buy t					22,000.00	USD

Rows Selected 1 Columns Hidden 49

**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

**Add to Document Builder** ✕

Selected Requisition Lines

Actions View Format Freeze Detach Wrap

Requisition	Line	Line Description	Requester	Amount	Currency
GM-REQ-1165	1	2019 Lamborgh... Dederer, Julie		222,000.00	USD

Columns Hidden 47

Add All Selected

Type

Source Agreement

\* Style

Supplier

Supplier Site

\* Currency

OK Cancel

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"

**Procurement BU**

GMHEC BU ▾

**Document Builder**

**Requisitioning BU**  
GMHEC BU

**Sold-to Legal Entity**  
Green Mountain Higher Education Consortium, Inc.

**Type**  
New Order

**Source Agreement**

**Style**  
Purchase Order

**Supplier**  
Amalgamated Culture Works

**Supplier Site**  
GM Burlington-1

**Currency**  
USD

Your Document Builder contains 1 lines.

**Recently Added Lines**

2019 Lamborghini. Che...	222,000.00 USD
<b>Total</b>	<b>222,000.00 USD</b>

**Information** X

The document (Purchase Order) GM-PO-1138 was created.

Navigation Path:

➤ Procurement → Purchase Orders → Process Requisitions → Edit Document

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

Edit Document (Purchase Order): GM-PO-1171 ★

Check Funds Manage Approvals View PDF Actions Save Submit Cancel

Main

General

Procurement BU GMHEC BU Supplier Amalgamated Culture Works \* Currency USD

Requisitioning BU GMHEC BU Supplier Site GM Burlington-1 Ordered 222,000.00 USD

Sold-to Legal Entity Green Mountain Higher Education Consortium, Inc. Supplier Contact Turiansjy, Wayne Total Tax 0.00 USD

Bill-to BU GMHEC BU Communication Method None Total 222,000.00 USD

Order GM-PO-1171 Bill-to Location GMHEC Bill To Location Procurement Card

Status Incomplete Default Ship-to Location Middlebury, VT - Main Campus Description

Funds Status \* Buyer Foster, Cheryl Requisition GM-REQ-1165

Creation Date 12-Feb-2019 Agreement

Terms Notes and Attachments

Required Acknowledgment None Shipping Method — Pay on receipt

Acknowledge Within Days Freight Terms  Confirming order

Payment Terms Net 30 FOB

## 6.2 Edit PO & Submit

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

Lines Schedules Distributions


Actions View Format Freeze Detach Wrap

Line	Description	Deliver-to Location	Quantity	UOM	Ordered	PO Charge Account	Budget Date	Funds Status	Additional Information
1	2019 Lamborghini Ch.	Middlebury, VT	1	EA	222,000.00	100-1100-10000-10-000000-00000-000	17-Jan-2019		111111

### 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.

100-1100-10000-10-000000-00000-000 



The following pop-up will appear where you can make your account changes:

**PO Charge Account** ✕

Hide Segments

Entity 100 Green Mountain Higher Education Consortium, Inc.

Department 1100 Shared Services

Object 10000 Payroll

Restriction 10 Unrestricted

Designation 000000 Default

Activity 00000 Default

Intercompany 000 Default

Future1 0 Default

**Quick Tip!** Refer to your COA training or contact your school's finance team for more information on Charge Accounts.

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

Lines Schedules **Distributions**

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Actions ▼ View ▼ Format ▼ 
 



 Freeze 
 Detach 
 Wrap

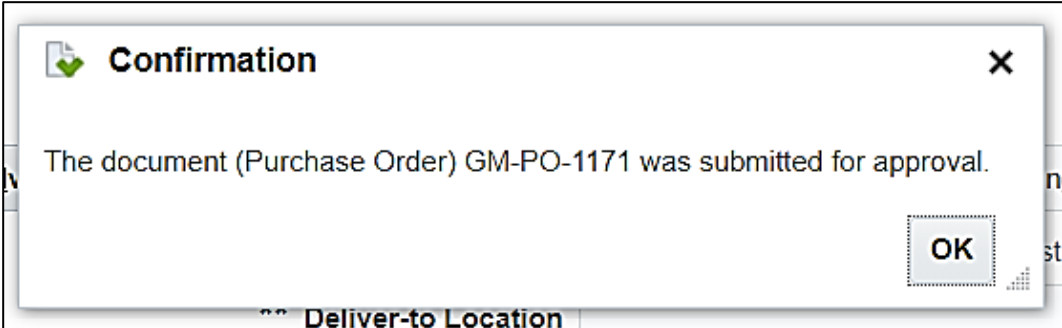
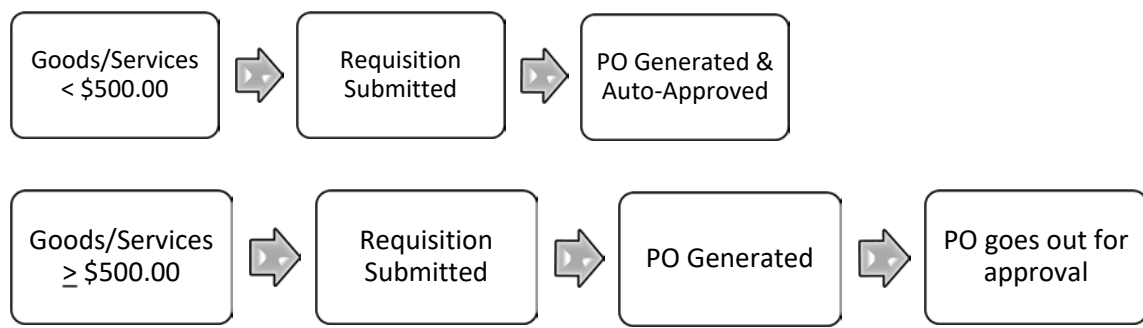

Your screen will now allow you to add more distributions:

Actions ▼ View ▼ Format ▼ Freeze Detach Wrap

Line	Description	Deliver-to Location	Quantity	UOM	Ordered	PO Charge Account	Budget Date	Funds Status	Additional Information
									Designation
1	2019 Lamborghini. Ch...	Middlebury, VT - Ma...	1	EA	222,000.00	100-1100-10000-10-000000-00000-000-0	17-Jan-2019		111111
1	2019 Lamborghini. Ch...	Middlebury, VT	0	EA	0.00	100-1100-10000-10-000000-00000-000-0	17-Jan-2019		111111

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

Check Funds
Manage Approvals
View PDF
Actions ▼
Save ▼
**Submit**
Cancel

	<p>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.</p>  <p>The dialog box is titled "Confirmation" and contains the text: "The document (Purchase Order) GM-PO-1171 was submitted for approval." There is an "OK" button at the bottom right.</p>
<p><b>6.4 Approval Flow</b></p>	<p>Once your PO is created, the following approval flow takes place:</p>  <pre> graph LR     A[Goods/Services &lt; \$500.00] --&gt; B[Requisition Submitted]     B --&gt; C[PO Generated &amp; Auto-Approved]     D[Goods/Services ≥ \$500.00] --&gt; E[Requisition Submitted]     E --&gt; F[PO Generated]     F --&gt; G[PO goes out for approval]     </pre> <p>If you created a change order by editing your PO, the PO will need re-approval if:</p> <ul style="list-style-type: none"> <li>• The total amount increases over 10%; or,</li> <li>• The total amount increases by more than or equal to \$10,000</li> </ul>
<p><b>6.3 PO Communication</b></p>	<p>Email through Oracle:</p> <ul style="list-style-type: none"> <li>• If an email for an ordering address in your supplier's file, the PO will be sent to the corresponding email</li> <li>• You will need to follow-up with your supplier to determine if they received your PO</li> </ul> <p>Print Email/Fax/Mail PO:</p> <ul style="list-style-type: none"> <li>• To download a PDF copy of your PO, click "View PDF" from the PO page:</li> </ul>  <p>The image shows three buttons: "View PDF", "Actions" with a dropdown arrow, and "Done".</p> <ul style="list-style-type: none"> <li>• Your PDF will download – here you can save and/or print your PDF to email from your own address, fax, or mail</li> <li>• You will need to follow-up with your supplier to determine if they received your PO</li> </ul>

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:

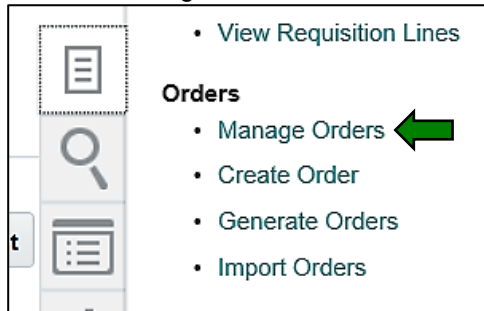
Navigation Path:

➤ Procurement → Purchase Orders



Click the Tasks button

Choose "Manage Orders"



In the search fields, enter your PO and click search

Manage Orders Done

Headers Schedules

Search

Advanced Manage Watchlist Saved Search All My Orders

\*\* Keywords

Procurement BU GMHEC BU

\*\* Supplier

\*\* Buyer

\*\* Order GM-PO-1004

\*\* Requisition

Status

Include Closed Documents No

Search Reset Save...

Your results will appear. Click on your PO

Headers Schedules

Search

Advanced Manage Watchlist Saved Search All My Orders

Search Results

Actions View Format + - Freeze Detach Wrap

Order	Description	Supplier	Ordered	Currency	Status	Life Cycle	Change Order	Creation Date
GM-PO-1004		W.B. Mason Co...	18.35	USD	Open	1		25-Mar-2019

Columns Hidden 39

A new page will pop up.

## 6.4 Approval Chain

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**

<b>Procurement BU</b>	GMHEC BU	<b>Supplier</b>	B&H Photo Electronics Corp.
<b>Requisitioning BU</b>	GMHEC BU	<b>Supplier Site</b>	GM Burlington-1
<b>Sold-to Legal Entity</b>	Green Mountain Higher Education Consortium, Inc.	<b>Supplier Contact</b>	Yehoshua Auman
<b>Bill-to BU</b>	GMHEC BU	<b>Communication Method</b>	None ⓘ
<b>Order</b>	GM-PO-1008	<b>Bill-to Location</b>	GMHEC Bill To Location
<b>Status</b>	Pending Approval	<b>Ship-to Location</b>	Kennedy Brothers
<b>Funds Status</b>	Warning ⚠		
<b>Buyer</b>	Cheryl Foster (Cheryl Foster)		
<b>Creation Date</b>	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**

<b>Procurement BU</b>	MIDD BU	<b>Supplier</b>	Fisher Scientific
<b>Requisitioning BU</b>	MIDD BU	<b>Supplier Site</b>	MD Boston-1
<b>Sold-to Legal Entity</b>	President and Fellows of Middlebury College Inc.	<b>Supplier Contact</b>	
<b>Bill-to BU</b>	MIDD BU	<b>Communication Method</b>	None ⓘ
<b>Order</b>	MD-PO-1004	<b>Bill-to Location</b>	Middlebury, VT - Main Campus
<b>Status</b>	Open	<b>Ship-to Location</b>	Stockroom, Bicentennial Hall
<b>Funds Status</b>	Reserved		
<b>Buyer</b>	Cheryl Foster (Cheryl Foster)		
<b>Creation Date</b>	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.



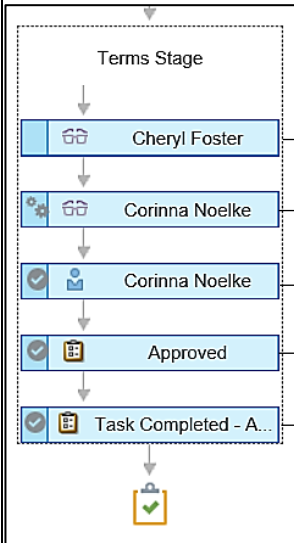
The glasses icon determines that a FYI notification was sent to this user/approver. No actions are necessary on a FYI notification.



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



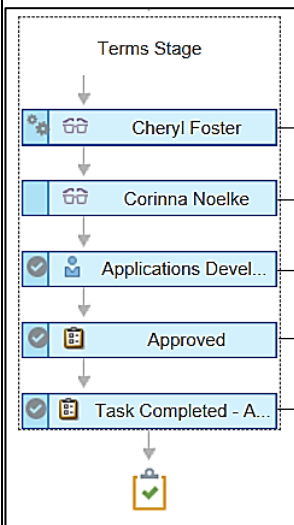
**Approval & Pending Approval Examples:**



**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.

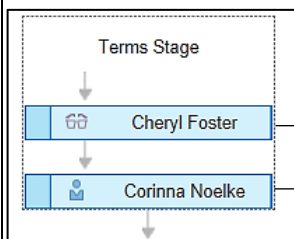
- Requestor receives FYI notification PO has been approved/implemented
- Approver receives FYI notification PO has been approved/implemented
- Approver has taken action
- PO has been approved
- Actions/tasks have been completed



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



**Pending Approval – Over or equal to \$500.00**

Note that the approver does not have a check mark next to her name. There is no verbiage stating that any stage of this workflow has been approved.

- Requestor receives FYI notification PO when has been approved/implemented
- 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.