

Purchase Order Setup and Rules

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Settings > Purchase Order > General Options

Activates use of Purchase Order.

User status In/Out of office

If a user wishes to change his/her (In/Out of Office) status, the menu option is Welcome Menu > User Preferences. Change Office status and click Save.

The new status remains until changed by the user upon next log in to SGA.

- If someone listed in the approval table has status “out of the office”, the purchase order goes to the proxy approver (if applicable).
 - If there is no proxy approver named, the purchase order waits for the approver’s return.
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Daily > Purchase Order List

Browse

- Displays the purchase orders. Purchase orders are created, approved, disapproved, etc. all from this screen.
- Double-click on a line to browse the detail of the purchase order. You may also browse file attachments if any exist.
- There are various filters at the top of the screen as well as a Filter button for a more advanced filter.
- Anyone can browse someone else’s PO at any time unless they are restricted by approval branch restrictions.
- Buttons will be activated based on where you fall in the approval table process. A checkbox allows you to select multiple purchase orders for approval, post, etc.
- Forms: Click this drop down menu to print the PO or export it to Word.

Edit

- The requester can edit a PO up to the time it is submitted. This includes add/delete attachments. After the PO is submitted, the only thing the requester can change is the received status.
- Users who have permission to post can edit any PO once it is approved, including the vendor#. They must be able to do this because they need to complete the incomplete requests. After a PO has been posted, the vendor can be changed if permissions allow;

however the vendor# cannot be changed once the PO has invoice activity.

- The Received Status can be changed at any time. However, account restrictions are considered on the entire PO. If the PO contains any accounts that the user does not have access, then this user cannot change the received status or anything about the PO.
- Users who have Purchase Order Entry permission 80-Modify Anything can add/delete attachments at any step of the PO process.

Delete

- The requester can delete a PO at any time up until it is posted. This is needed in event they discover they no longer need the item. If the requester does delete a PO that is "Awaiting Approval" or "Approved", then it will send an email notifying those who already approved it.
 - Users who have permission to post can delete any PO until it is posted. They must be able to do this to clean up old PO's or those that have been disapproved, but never deleted.

Approval/Submit

- Only the person who entered the PO can submit it.

Approval Process

- When a PO is approved it moves on to the next approver in the approval table. If there are no more approvers then the status changes to approved.
 - When a PO arrives at a user for approval, if the user is "Out of the Office" then it will instead go to Proxy Approver 1. If Proxy Approver 1 is "Out of the Office", it goes to Proxy Approver 2.
 - If the approver is "Out of the Office" and no proxy approvers are designated, this approver will get the request and the PO will await his/her approval.
 - If at any point a PO is waiting on an out-of-office or incorrect user, someone with authorization can approve on behalf of the waiting-on user or modify the PO to wait on a different user's approval. Click Approval Table dropdown and select "Approve for current approver and move to next approver" or "Change Waiting on user".
 - If a user disapproves a PO, he/she must specify a reason. If a PO is disapproved, it returns to the requester. This user can delete the PO or make changes to the PO and resubmit. The PO then goes through the approval process again. Only the requester receives email notification if the PO was disapproved.
 - If a user disapproves and resubmits a PO, the system opens the PO in edit form and allows the user to make modifications and re-submit for approval. The disapproving user becomes the new submitter.

Post

- When a PO is posted it encumbers the budget, reducing budget remaining. Encumbrance is optional.

Close

- PO's are closed when you create an invoice for the PO. They can either be fully closed or partially closed.
 - To manually close a PO click the Close button.

For details on entry see [Purchase Order](#).
