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Purchase Order Setup and Rules

Settings > Purchase Order > General Options

Activates the use of Purchase Order.

User Status In/Out of Office

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

The new status remains until the user changes it upon the next login to SGA.

- If someone listed in the approval table has the status **out of the office**, the purchase order goes to the proxy approver (if applicable).
- If no proxy approver is named, the purchase order waits for the approver's return.

Purchase Order List

Daily > Purchase Order List

Browse

- Displays the purchase orders. Purchase orders are created, approved, disapproved, etc., from this screen.
- Double-click on a line to browse the details of the purchase order. You may also browse file attachments if any exist.
- Various filters are displayed at the top of the screen, and a filter button allows for more advanced filters.
- Anyone can browse someone else's PO at any time unless approval branch restrictions restrict them.
- Buttons will be activated based on your position in the approval table process. A checkbox allows you to select multiple purchase orders for approval, posting, etc.
- Forms: Click this drop-down menu to print the PO or export it to Word.

Edit

- The requester can edit a PO until it is submitted, including adding or deleting attachments.

However, the requester can change the received status only after submitting the PO.

- Users with permission to post can edit any approved PO, including the vendor number. They must be able to do this because they need to complete incomplete requests. If permissions allow, the vendor can be changed after a PO has been posted; however, the vendor number cannot be changed once the PO has invoice activity.
- The Received Status can be changed at any time. However, account restrictions apply to the entire PO. If the PO contains any accounts that the user cannot access, the user cannot change the received status or anything else about the PO.
- Users with Purchase Order Entry permission **80-Modify** Anything can add or delete attachments at any step of the PO process.

Delete

- The requester can delete a PO at any time until it is posted. This is needed if they discover they no longer need the item. If the requester deletes a PO that is **Awaiting Approval** or **Approved**, it will send an email notifying those who have already approved it.
    - Users with permission to post can delete any PO until it is posted. They must be able to do this to clean up old POs 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 to the next approver in the approval table. If there are no more approvers, the status will change to approved.
    - When a PO arrives at a user for approval, if the user is **out of the Office,** it will go to Proxy Approver 1 instead. If Proxy Approver 1 is **out of the Office**, it will go 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 their approval.
    - Suppose a PO is ever waiting on an out-of-office or incorrect user. In that case, someone with authorization can approve on behalf of the waiting user or modify the PO to stay on a different user's approval. Click the **Approval Table** dropdown and select **Approve for the current approver, move to the next approver,** or **Change Waiting on the user.**
    - If a user disapproves a PO, they must specify a reason. If a PO is disapproved, it returns to the requester. This user can delete the PO, make changes, and resubmit it. The PO then goes through the approval process again. Only the requester receives an email

notification if the PO is disapproved.

    - If a user disapproves of and resubmits a PO, the system opens the PO in the edit form, allows the user to make modifications, and resubmits for approval. The disapproving user becomes the new submitter.

Post

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

Close

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

For details on entry, see Purchase Order.