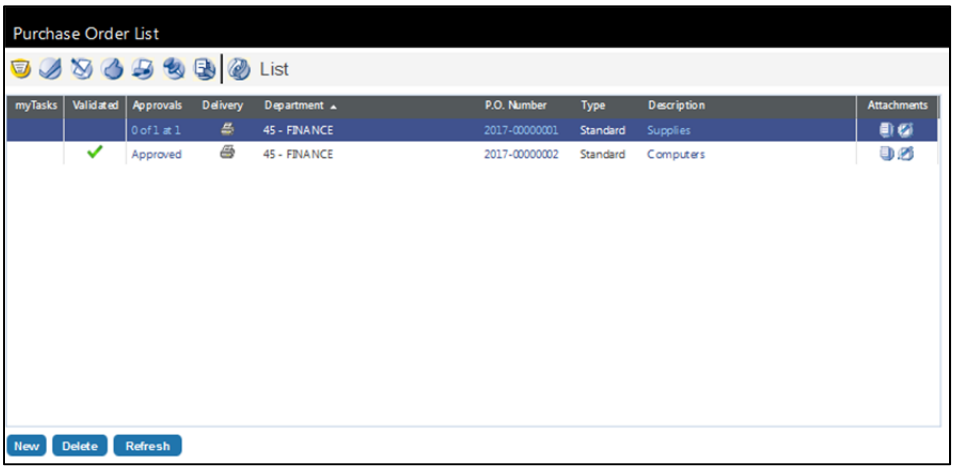
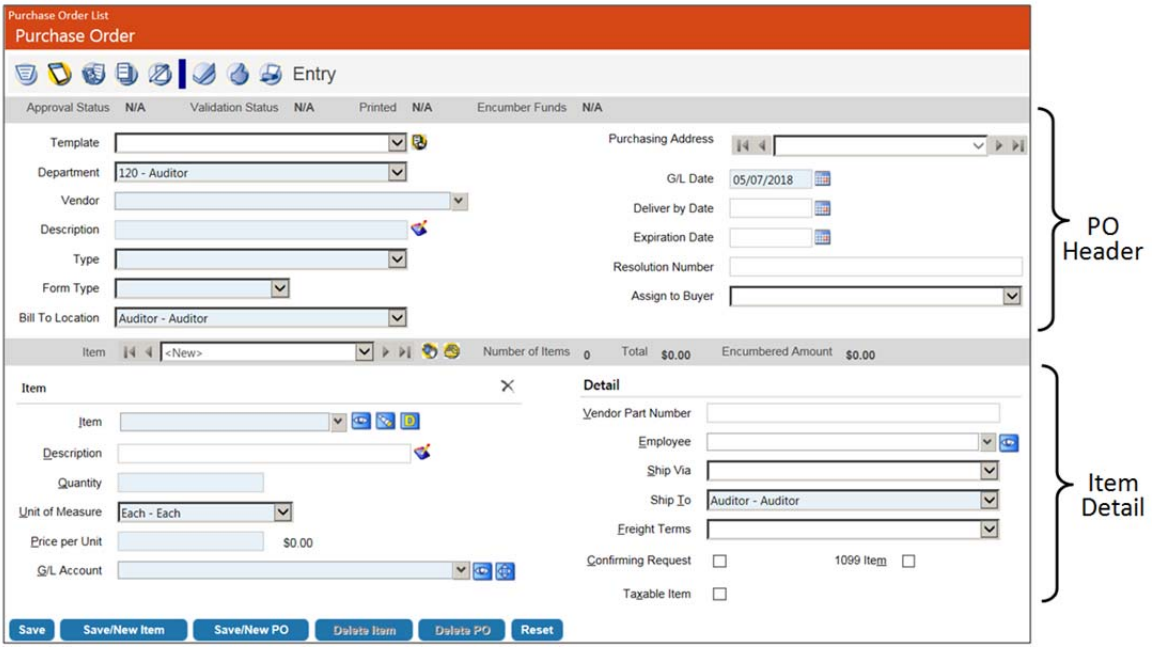
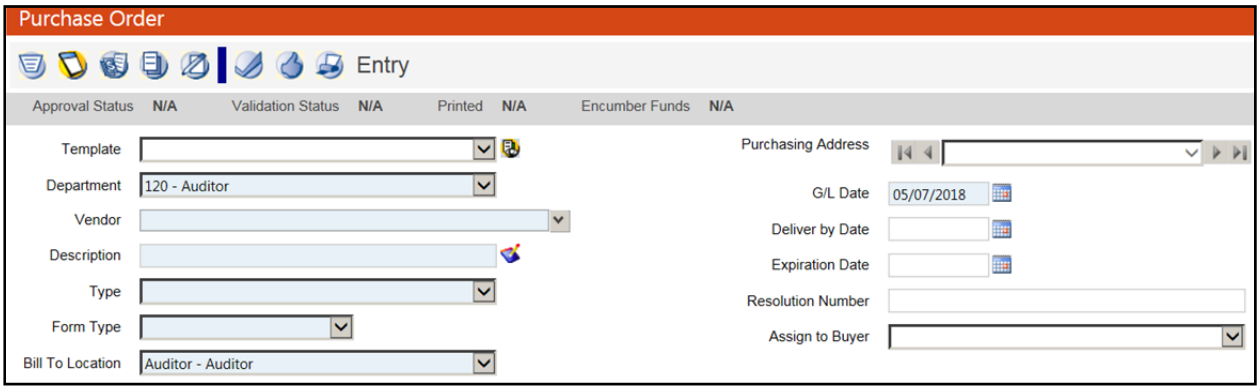
PURCHASE ORDER ENTRY

1. Navigate to Financial Management → Procurement → Purchasing → Purchase Orders

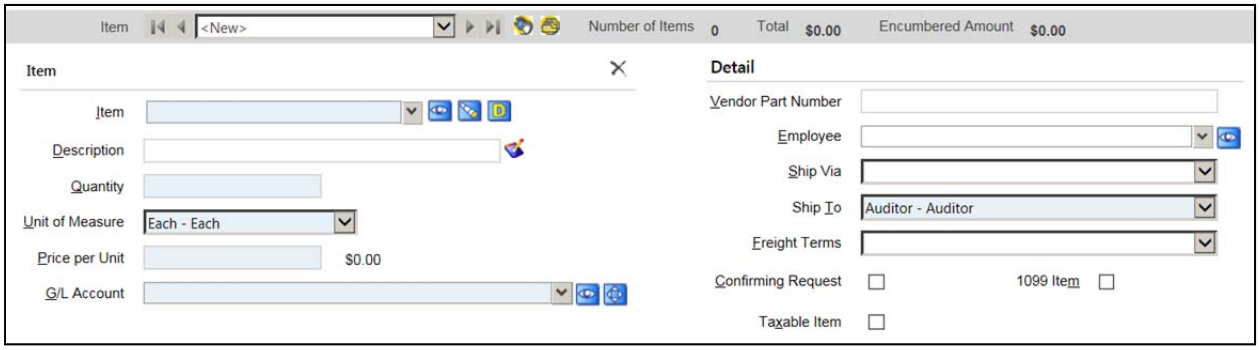


2. Click "New". You will see the page below.





3. Complete the following fields in the PO header (*Required Fields):
   - ***Department** – This will default to your department
   - ***Vendor** – Start typing in part of the vendor's name and select from the list
   - ***Description** – Overall description that describes the items being purchased
     - Click on icon to add a one-time message to the vendor
   - ***Type** – Select "Standard" or "Blanket"
   - ***Form Type** – Should default
   - ***Bill to** – Determines the billing address that prints on the PO (should be defaulted based on selected department)
   - **Deliver by Date** – Optional; Informational field that will print on the PO
   - **Expiration Date** – Optional
   - **Resolution Number** – Optional; used to reference a resolution or ordinance number
   - **Assigned to Buyer** – Optional



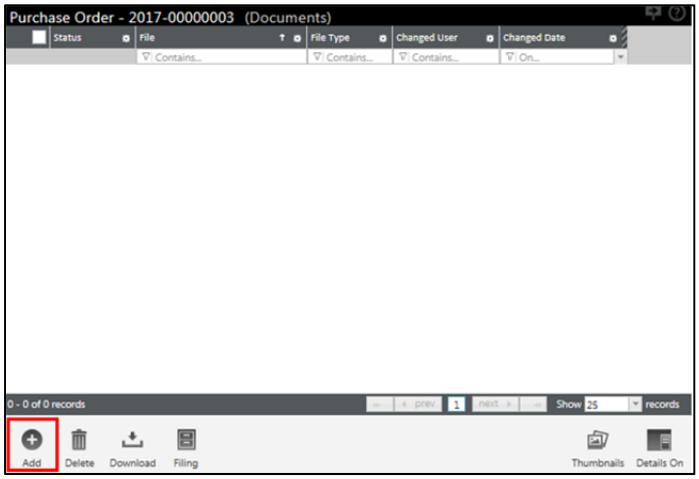
4. Complete the following fields in the Item Detail (*Required fields):
   - ***Item** – Begin typing description and select item from list or click the eyeball icon to search entire item list
   - **Description** – describes the individual item being purchased. This will print on the PO.
     - If this field is too small, click on icon for additional space
   - ***Quantity** – Enter the quantity being purchased

- ***Unit of measure**
- ***Price per unit**
- ***GL Account** – Type the full GL Account number (delimiters not required) or click the eyeball icon to use search for the correct GL account. The account can also be selected from the dropdown list, which will show recently used GL accounts.
- **Vendor Part Number, Employee, Ship Via** – Optional
- ***Ship to** –Determines the shipping address that prints on the PO (should be defaulted based on selected functional department)
- **Freight Terms** – Optional
- **1099 Item** – Select for services

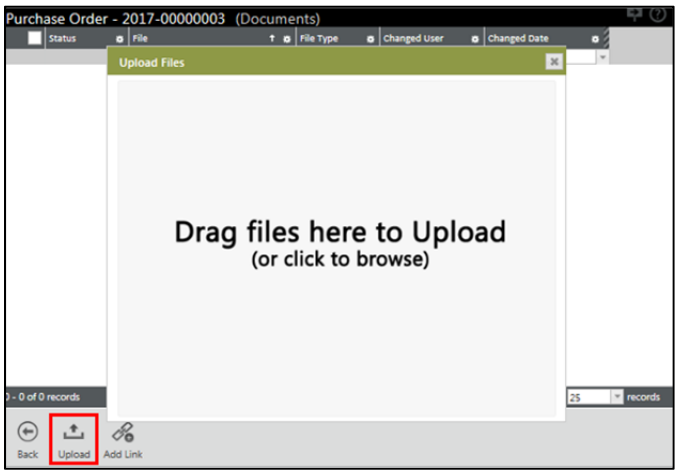
5. Save:
   - **Save** – This will save the current PO
   - **Save/New Item** – This will save the PO and bring up a new item screen to add a second item to the current PO
   - **Save/New PO** – This will save the current PO and bring up a new PO entry screen.

6. Attaching Documents:
   - After the PO has been saved, click the “Document” icon at the top

   - This will bring up the document viewer
   - Click “Add”



- Click the “Upload” button then either drag and drop files into the box or click to browse



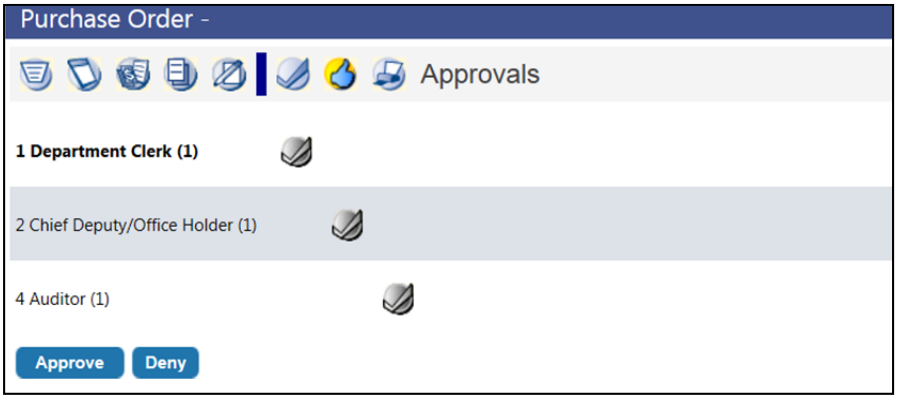
- Once all documents have been uploaded close both popup windows

7. Validate:
   - Click the “Validate” (checkmark) icon at the top

   - Click “OK” on the validation popup window. If any validation errors exist, these must be fixed and revalidated before the PO can be approved.

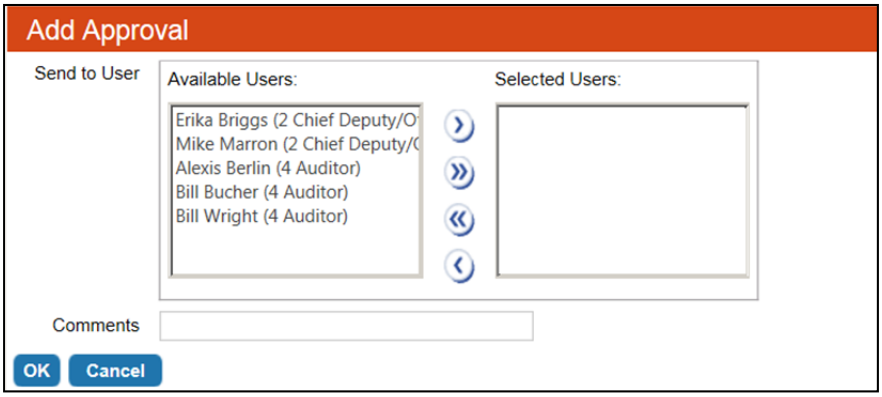
8. Approval:
   - Click the “Approval” (thumbs up) icon at the top

   - Click the “Approve” Button

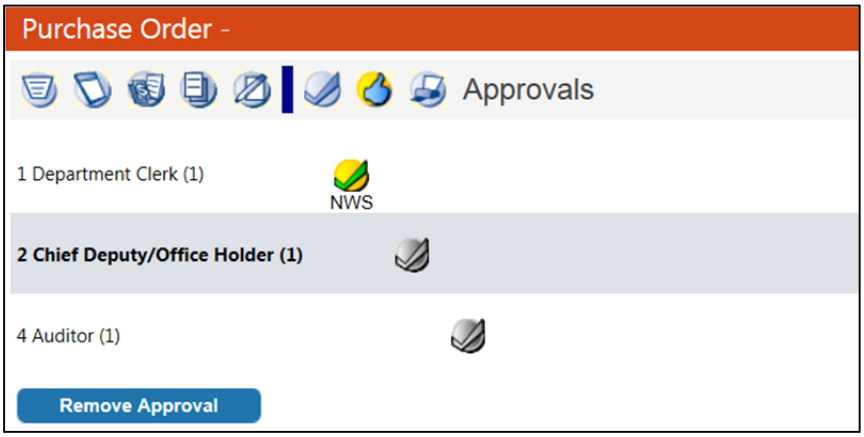


- If you don't select any users from the Add Approval window, the system automatically sends the batch to all the users setup at the next level. If you want to send this to a specific user or users, move those user(s) to the box on the right side.

- Click "OK" from the approval popup window.



9. After you approve the PO, the icon next to your approval level will be colored in and your name will appear below it. You will also be able to remove your approval if needed

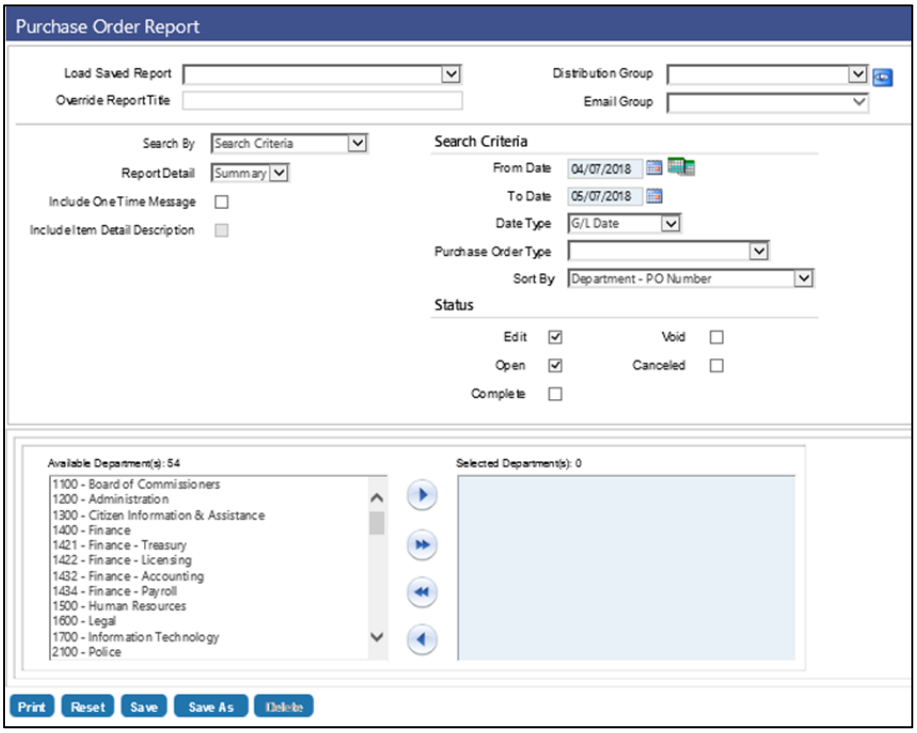


LOOKING UP PO NUMBER AND PO STATUS

Once your PO has been fully approved and posted, the PO number will available and the entry will no longer appear on the Purchase Order List page.
Using either Inquiries or Reports will allow users to look up their POs for the number and status.

USING REPORTS

1. Navigate to Financial Management → Reports → Purchasing → Purchase Order Reports

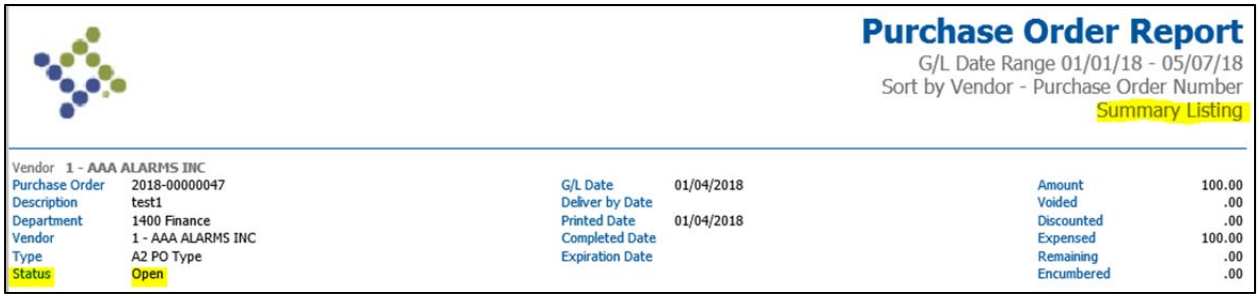


2. Select the desired report criteria and output preferences.

3. Select the applicable "Statuses" to be included in the report:
   - **Edit** Status: POs that are still in process and therefore can be found on the Purchase Order List page
   - **Open** Status: fully approved and posted POs and therefore will have a PO number
   - **Complete** Status: POs that have been fully invoiced and paid
   - **Void** Status: POs that are voided after fully processed
   - **Canceled** Status: POs were stopped within the process before being approved and posted

4. In the multi-select boxes, move the applicable department(s) to the right selection box.

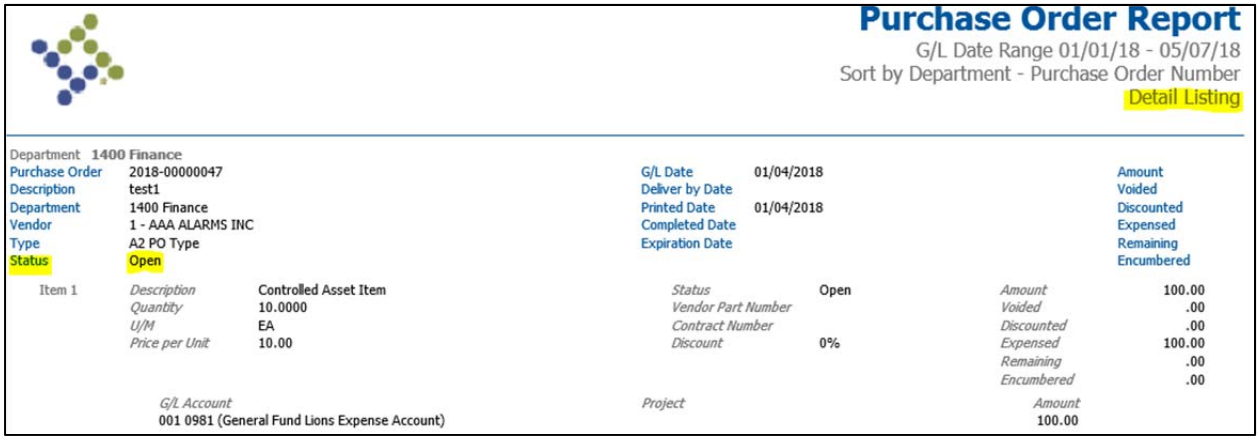
5. Click “Print” to generate the report. The report will look similar to the samples below



Purchase Order Report
G/L Date Range 01/01/18 - 05/07/18
Sort by Vendor - Purchase Order Number
Summary Listing

Vendor 1 - AAA ALARMS INC

Purchase Order	2018-00000047	G/L Date	01/04/2018	Amount	100.00
Description	test1	Deliver by Date		Voided	.00
Department	1400 Finance	Printed Date	01/04/2018	Discounted	.00
Vendor	1 - AAA ALARMS INC	Completed Date		Expensed	100.00
Type	A2 PO Type	Expiration Date		Remaining	.00
Status	Open			Encumbered	.00



Purchase Order Report
G/L Date Range 01/01/18 - 05/07/18
Sort by Department - Purchase Order Number
Detail Listing

Department 1400 Finance

Purchase Order	2018-00000047	G/L Date	01/04/2018	Amount	
Description	test1	Deliver by Date		Voided	
Department	1400 Finance	Printed Date	01/04/2018	Discounted	
Vendor	1 - AAA ALARMS INC	Completed Date		Expensed	
Type	A2 PO Type	Expiration Date		Remaining	
Status	Open			Encumbered	

Item 1	*Description*	Controlled Asset Item	*Status*	Open	*Amount*	100.00
	Quantity	10.0000	*Vendor Part Number*		*Voided*	.00
	U/M	EA	*Contract Number*		*Discounted*	.00
	Price per Unit	10.00	*Discount*	0%	*Expensed*	100.00
					Remaining	.00
					Encumbered	.00

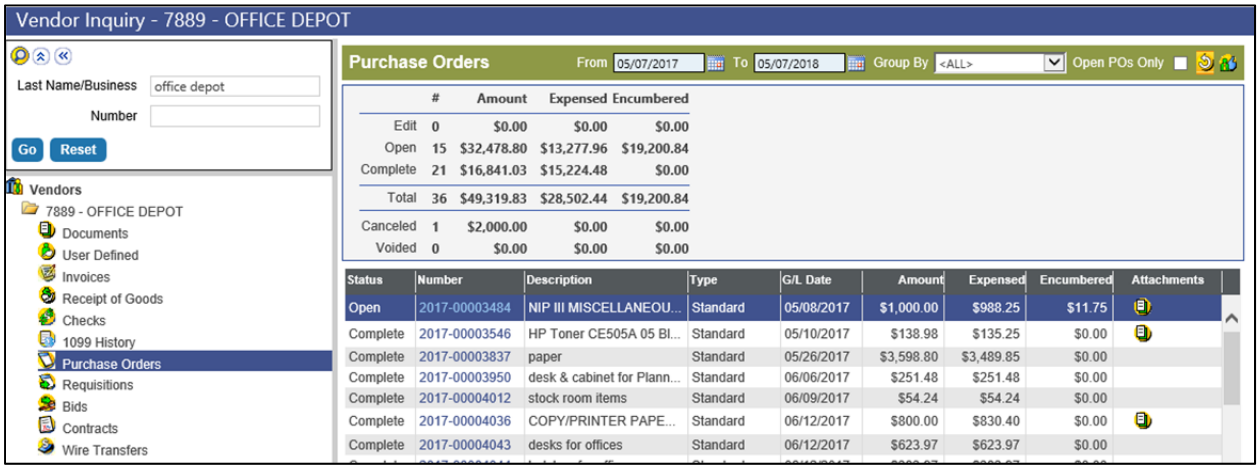
G/L Account	*Project*	*Amount*
001 0981 (General Fund Lions Expense Account)		100.00

USING INQUIRIES

1. Navigate to Financial Management → Inquiries → Vendors

2. Use the “Number” or “Name” fields to search for the vendor of interest. Click “Go” for to see the results

3. Expand the vendor by clicking on the folder icon, and select “Purchase Orders”

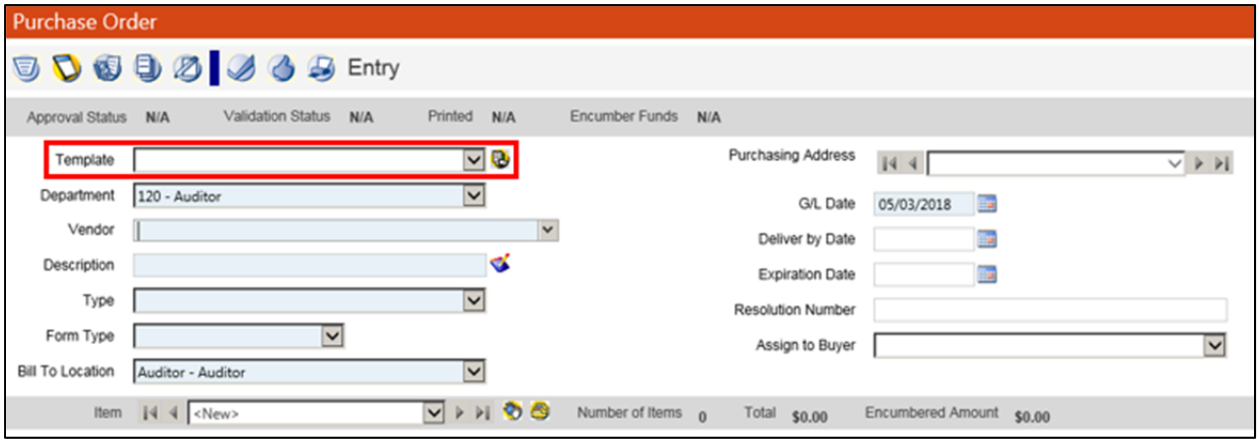


4. In the “Status” column:
   - **Edit**: POs that are still in process and therefore will not have PO numbers
   - **Open**: fully approved and posted POs and therefore will have a PO number
   - **Complete**: POs that have been fully invoiced and paid
   - **Void**: POs that are voided after fully processed
   - **Canceled**: POs were stopped within the process before being approved and posted

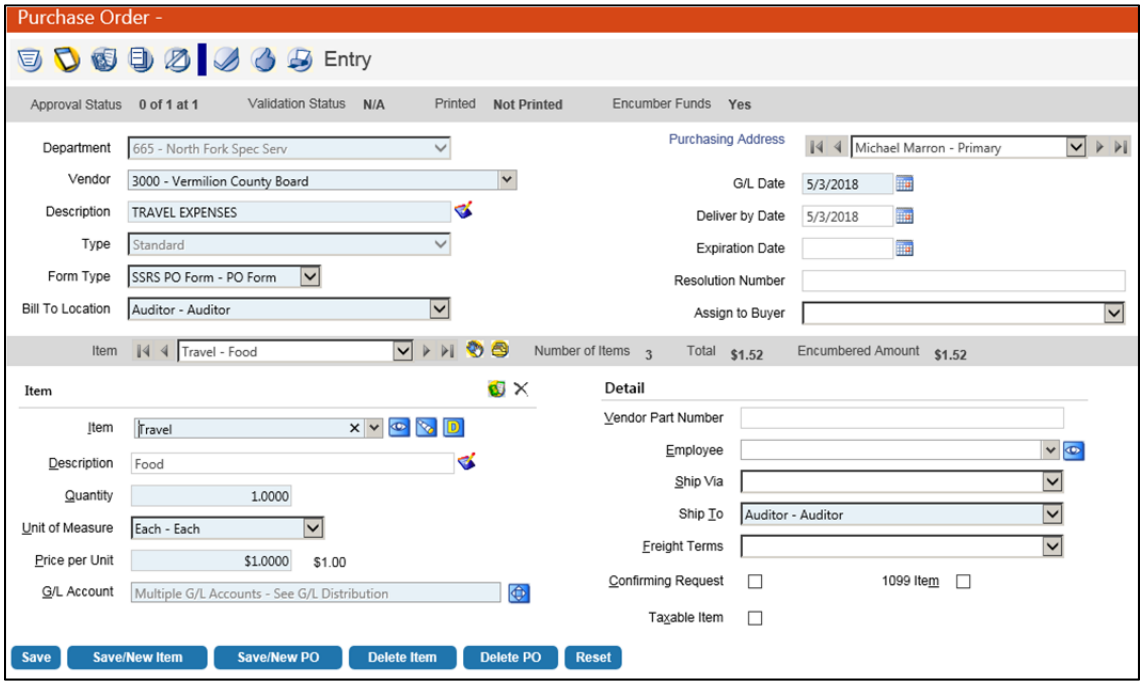
USING TEMPLATE PURCHASE ORDERS

TRAVEL EXPENSES

1. Using the steps from the previous section “Purchase Order Entry” open a new PO page



2. Use the “Template” drop-down to select “TRAVEL EXPENSES”. Click outside the field to refresh the screen. Required fields will auto-populate and three items will be added.



3. In the PO header, change the “Vendor” and update remaining fields as needed and click “Save”

4. Use the item drop-down to navigate between items. Be sure to update the “Quantity” for the Mileage item, and the “Price per Unit” for the Hotel and Meals items. Update the remaining fields as needed and click “Save”

5. To remove any unnecessary items, navigate to the item using the drop-down and click the “Delete Item” button

6. Finish the PO entry process using the steps outlined in the “Purchase Order Entry” section