Purchase Order Process

Overview

Step 01 **Purchase Requisition Creation**
Purchase Orders are created from approved Purchase Requisitions.
Stakeholders: Requisitioner

Step 02 **Track Purchase Requisition Approval**
Track the Purchase Requisition approval in JICS. Once a Purchase Requisition is approved a new Purchase Order number is generated.
Stakeholders: Requisitioner's approvers, Senior Director of Finance, Accounts Payable

Step 03 **Accessing Purchase Order**
Once the Purchase Order is generated, it can be downloaded in JICS and shared with the applicable vendor by the requisitioner.
Stakeholders: Requisitioner

Step 04 **Goods/Service Delivery**
The vendor delivers goods, or provides services, and the buyer inspects the goods or services for quality and quantity.
Stakeholders: Receiving Personnel, Buyer, Administrative Staff

Step 05 **Receive/Inspect/Authorize Invoice**
The invoice is matched to the Purchase Order, if there are no discrepancies found, the approved invoice and signed Purchase Order are forwarded to ap@seu.edu to authorize for payment.
Stakeholders: Requisitioner, Accounts Payable

Step 06 **Purchase Order Closure**
If the Purchase Order is fulfilled and does not have any outstanding invoices, the Purchase Order should be signed, noted with "Close PO", and submitted to ap@seu.edu to close the Purchase Order.
Stakeholders: Requisitioner, Accounts Payable

Step-By Step

Step 01 **Purchase Requisition Creation**

A. Log into JICS
B. Select Finances on the red navigation ribbon
C. Under Requisitions and Orders, select Make New Request
D. Enter the following:
   1. Description
   2. Quantity
   3. Unit Price
   4. Budget Account (GL Account)
   5. Detailed Description
E. Choose Save, and Add Another Line or move to Done, Proceed to Checkout
F. If selecting Add Another, repeat section D, steps 1-5
G. If, Done Proceed to Checkout, enter the following:
   1. Request Name (requestor)
   2. Purchasing Agent (employee number of the individual entering the requisition)
   3. Need by Date (date the order is to be completed)
   4. Approval Track (this information should autofill, select preview to see next steps)
   5. Vendor (enter the vendor number or use the search feature)

6. Ship Order Here (select the department name that is managing the order)
7. Add a Comment (not required but room for additional notes related to the order)
8. Add a File (required, add the quote, invoice, contract, or other documentation related to the pricing and services/goods)

H. Choose one of the following
1. Select Submit for Approval (submit and monitor approval process)
2. Save and Submit Later (allows to revisit a later time for further processing)
3. Delete Request (removes requisition)

Step 02 **Track Purchase Order Approval**

A. Log into JICS
B. Select Finances on the red navigation ribbon
C. Select Search Your Requisitions
D. Select Search
E. From the Requisition overview table, locate the Purchase Requisition from the table, then locate the Track column and select the paper icon
F. A pop out window will appear with the Approval Track Details
G. If appropriate, contact the next person to approve the Purchase Requisition to check the status of the approval

Step 03 **Accessing Purchase Orders**

A. Log into JICS
B. Select Finances on the red navigation ribbon
C. Select Search Your Requisitions
D. Select Search
E. If the Purchase Requisition has been approved, a Purchase Order will be available to download
1. From the Requisition overview table, locate the Purchase Order from the table, then locate the PO column and select the paper icon
2. A new file will appear at the bottom of the screen with a PDF version of the selected Purchase Order
3. Download to save, print, or email

Step 04 **Goods/Service Delivery**

A. Receive the goods or service
B. Ensure the goods or service has met the order expectations
C. Request an invoice from the vendor

Step 05 **Receive/Inspect/Authorize Invoice**

A. Review the invoice to ensure pricing, goods, services align with the Purchase Order
B. Identify goods or services and amount to be paid from the Purchase Order
C. Digitally (or manually) sign a copy of the Purchase Order
D. Email the invoice along with the completed and signed Purchase Order to ap@seu.edu

Step 06 **Purchase Order Closure**

A. When the Purchase Order has been fulfilled or is no longer needed, indicate on the Purchase Order “Close PO”
B. Digitally (or manually) sign the Purchase Order
C. Email the signed Purchase Order that states “Close PO” to ap@seu.edu