Purchasing Process – Requisition, Approval, and Purchase Order

To begin a new requisition, Select the Add Requisition tile on the Dashboard. A 4-step process will open to create a complete requisition.

1: Requisition Info – fill in the required fields with general information.

Note: If a vendor is missing, please acquire a W-9 form from the new vendor and provide the info to Accounts Payable. If a Tax Exemption Certificate is required, please contact Accounts Payable.

2: Add Items – Complete the Add Item form for each item or group of items. If the item has units to track over multiple purchases under the same PO, change the commodity code from [NA] to [Units].

If the item's cost needs to be spread across multiple accounts, use the Add Distribution. If adding another item, you can select Save & New to allow input of a new item, or if the next item is similar, then Save & Copy will generate an identical item for you to edit.

Note: If unable to find an account, contact Finance for it to be added to your list of accounts.

3: Attachments – Upload supporting files for your requisition, receipts, invoices, bid info, anything relevant to support and inform about the purchase.

4: Review and Submit- if correct and complete

Once completed, the system will take you to the Requisitions menu, which will list all the requisitions. Here a Department Head can Approve Requisitions entered in their department, review Requisitions and Approvals, Edit incomplete requisitions, and once approved, Issue a PO.
A requisition can be denied after initial approval until a PO is issued.

To Issue a PO select Issue PO at the bottom of an approved Requisition, **this will begin a process requiring you to click through completely.**

First, is PO Issue Date. System default is usually fine, but this can be changed if needed. Then **click Begin Process at the top.** This creates a PO report.

The PO report will display. Here you can print a copy of the PO, export it to your computer to save, and email the PO to someone. When you have completed your option(s), **continue the process by selecting Continue Process at the top.**

The last step in issuing a PO is updating the system. On the final window **select Begin Processing at the top to update the accounts in the system.**

After issuing a PO, those can be viewed by selecting the Purchase Orders tile on the Dashboard.
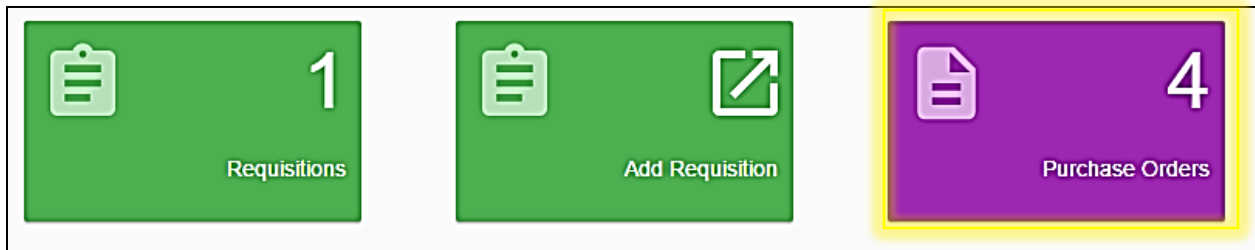
Here you can see all POs and their status. The options at the bottom are mostly for Accounts Payable to pay Outstanding POs. Below are additional details for the two options available here.

Receive Goods: If you changed the commodity code to [Units] during the requisition, this will be updated as items are received and paid to show units received and available to order.

Edit: allows you to view more details, add additional documents, and flag a PO as Blanket.

City Credit Account?

If the vendor is a credit vendor (such as Main Street Hardware) then the supporting documents will be provided to AP as usual.

Need another copy of the PO report?

The three vertical dots above the tiles will let you select multiple POs to recreate the PO report to save.