## Self-Service Purchase Orders (PO)

You may now submit request for purchase orders via MyCap self-service.  Self-service will also allow you to track the status of your request at all times. See separate instructions for self-service payment requisition.  **A Purchase Order is required for all procurements $5,000 and above.** Blanket purchase orders (BPO) are not available in MyCap and will need to be requested from Finance.

Documentation required:  A vendor quote or contract is required for all PO requests.  In addition, purchase $10,000 and above will need to complete the excel/PDF Purchase Order Checklist.  All documents will need to be uploaded via MyCap before approval.

To request a PO, log into MyCap self-service.  At the home screen, select "Procurement"



Choose the Create tab to enter a purchase order.  From the Create tab, choose "Purchase Order from the Document type drop down box.

**Document type**-Purchase order.

**Purchase order date**-defaults to today.

**Initiator-** Enter name of person initiating this request if it is someone other than you, otherwise your name will default in.

**Vendor ID**- Type in all or part of the name of the vendor. A list of possible vendor matches will appear. If the correct one is not there, contact Jason Davis in AP and follow new vendor protocol. Others may have more than 1 address for the same vendor, choose the correct address on your invoice. Vendors who are in Colleague as people, not organizations, may not have addresses in drop down.

**AP type**- Defaults to 0001. Do not change.

**Tax codes**-Do not change

Revised 8.21.21

| AP Type | Commodity |
| --- | --- |

**AP Type**
0001 REGULAR A/P

**Commodity**
Commodity

**Tax Code 1**
None

**Tax Code 2**
None

**Tax Code 3**
None

**Items**

| Line Items | Description | Vendor Part | Quantity | Unit | Price | Extended Price | |
| --- | --- | --- | --- | --- | --- | --- | --- |

Add Item

Cancel     Save and Attach

**Items-** Click on *add item*. Enter a description of the purchase, quantity ordered and price per item. Extended price will auto populate for the total price.

**GL Account-**Start entering number, drop down will show with numbers you have access to. You can enter the name of the department or object code too. You can add more than one GL# per item. You can also add more than one item to a purchase request for the same vendor.

**Items**

| Line Items | Description | Vendor Part | Quantity | Unit | Price | Extended Price | |
| --- | --- | --- | --- | --- | --- | --- | --- |

**New Item**

**Description ***

**Vendor Part**

**Quantity ***

**Unit**
None

**Price**

**Extended Price**
$0.00

**GL Account ***
Search by GL Account...

**Amount**
0.00

**GL Remaining Balance**

Add GL Account

Cancel     Add Item

**Internal Comments**-Any comments you wish to include go here.

When done, choose Save and Attach. You will have to upload the documentation before saving is complete.

**Enter next approvers**. Enter the name of your next approver.  You may also use their user ID(name part of e-mail address) or Colleague ID#.  Purchase orders less than $2,500 may be approved by budget manager, department chair or director.  Orders over $2,500 will need to be approved by the divisional VP and orders $5,000 and greater will require approval from the VP for Business & Finance.

Enter the name of the first approver and then have that approver enter the next approver. If all approvers are entered at once and the approver with the highest approval approves it first, the rest will not see it. An e-mail will be sent to them notifying them that there is a PO to be approved.

## Receiving Goods and Services

Once invoice arrives, items will need to be accepted under Receive Goods and Services option and invoice attached before it can be paid. Enter the quantity received and then click on Submit.

An e-mail will automatically be sent to AP once the items on a PO have been accepted letting AP know it is OK to pay.

**Procurement Receiving**

Receive Goods and Services

Choose a Vendor and/or PO to filter lines shown:

| Vendor | Purchase Order Number |
|---|---|
| Vendor Lookup | None |

The following apply to all lines received

| Packing Slip | Arrived Via |
|---|---|
|  | None |

☐ Accept All

| Vendor/ Document | Item | Quantity | Qty Accepted | MSDS Rcvd | Reject/ Return |
|---|---|---|---|---|---|
| CE Price Garage Door Company, Inc. (1724290) P0025737 | parts | 25.000 |  | ☐ | 📄 |
| Penguin Group Usa (0364717) P0025733 | books | 25.000 |  | ☐ | 📄 |
| Rumpke (1119821) P0025731 | collection | 9.000 |  | ☐ | 📄 |
| Staples Advantage (1868543) | supplies | 100.000 |  |  |  |

Submit