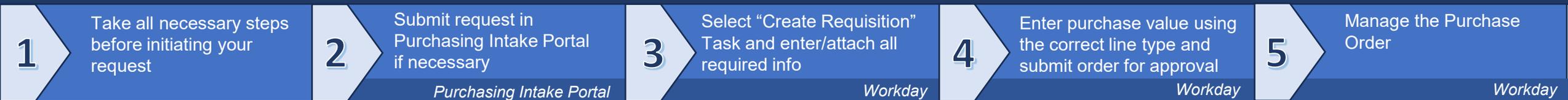# Purchase Order (PO) Quick Reference Guide

This Quick Reference Guide is a summary and should be used alongside, not as a replacement for, document 3201 PR.01. For detailed information on roles, responsibilities, and process steps, please refer to 3201 PR.01.

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1 — Take all necessary steps before initiating your request

- ☐ Document business need
- ☐ **If restricted goods or services:** consult Policies 3210, 3220, and 4209
- ☐ **If sponsored award or restricted gift funds:** Consult Policies 2200 and 2200 PR.02
- ☐ Gather quantity, description, specifications, catalog number, etc. (refer to step 2 of this Quick Reference Guide if these items are unknown).
- ☐ Obtain ship to/deliver to addresses
- ☐ Obtain charging instructions
- ☐ Ensure purchase method in Buying Guide is utilized
- ☐ Secure any documentation (including Contracts) as required by Policies 3201 and 3210
- ☐ Ensure you are assigned the correct Workday role for purchase submission
- ☐ Ensure the Supplier is active in Workday using the "Find Suppliers" report
- ☐ **If the Supplier is not active in Workday:** Submit a new Supplier Request per Procedure 3401 PR.01

2 — Submit request in Purchasing Intake Portal if necessary
Purchasing Intake Portal

- ☐ **If help is needed identifying a Supplier:** submit request through the Purchasing Intake Portal with all relevant documentation attached
- ☐ **If help is needed determining sourcing strategy:** *submit request through the Purchasing Intake Portal with all relevant documentation attached
- ☐ **If a contract needs to be negotiated, reviewed, and/or executed :** submit request through the Purchasing Intake Portal with all relevant documentation attached
- ☐ **If review of supporting and/or required documentation is needed:** submit request through the Purchasing Intake Portal with all relevant documentation attached

3 — Select "Create Requisition" Task and enter/attach all required info
Workday

- ☐ Choose correct requisition type based on directions in Section 3.A of Procedure 3201 PR.01
- ☐ **If item is available in the catalog:** Select "Connect to the Supplier's Website", shop for items, and return the item(s) to the Workday shopping cart.
- ☐ **If good or service is NOT available in the catalog:** select "Request Non-Catalog Items" purchase type in Workday
- ☐ Remember the description entered will be listed on the PO sent to the Supplier
- ☐ Ensure all documentation required per Policy 3201 is attached (see Step 1)
- ☐ **If a contract is required per Policy 3210:** ensure the signed contract is attached (see Step 1)

4 — Enter purchase value using the correct line type and submit order for approval
Workday

- ☐ **If purchase is for services with a known value:** enter the total value of the purchase on a single service line
- ☐ **If purchase is for services without a known value:** submit estimated total value for a period of one year with supporting documentation
- ☐ **If purchase is for services with a multi-year term:** enter the total value of all years as a single service line, unless the Supplier or funding source requires each year listed separately on the PO
- ☐ **If purchase is for Capital Equipment:** each item must be itemized onto a goods line (regardless of quantity)
- ☐ **If the number of goods items being purchased is 15 items or less:** itemize each item onto a separate goods line
- ☐ **If the number of goods items being purchased is more than 15 items :** Enter the total value on a single service line
- ☐ **If goods purchase has a bulk discount applied to the quote:** the Supplier should revise the quote to reflect a discount on each item; if not possible, the purchase should be submitted as a single service line
- ☐ **If goods purchase has a significant shipping/freight cost that is required to be on the PO:** the cost should be entered as a separate goods line
- ☐ **If goods purchase includes installment payments:** enter each installment as a separate goods line

5 — Manage the Purchase Order
Workday

- ☐ Ensure the balance on the PO is monitored for sufficient funds and a Change Order is submitted, when necessary, per Section 5 of Procedure 3201 PR.01
- ☐ Ensure all relevant changes are made to the PO to align with the latest contract
- ☐ Ensure the PO is not overutilized or reused inappropriately. When necessary, submit a Change Order per Section 5 of Procedure 3201 PR.01.
- ☐ **If the PO has a remaining balance and all goods are received and/or services are complete:** ensure the PO is closed by submitting a request through the Purchasing Intake Portal
- ☐ Ensure all documentation is properly retained per Policy 1105

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