

PO Print

Purpose

A purchase order (PO) is a binding instrument authorizing a vendor to provide goods and/or services. In general, the purchase order must be sent to the vendor to initiate the purchase. Many vendors are registered to receive purchase orders through eVA automatically upon issuance. When a vendor is not so configured, it's necessary to send the purchase order manually.

Business Rule

Business Rule

Steps by Participant and Milestone

Approval

SSC Procurement Administrative Assistant

- 1. Approval**
 - 1.1. Purchase Requisition at PO Print**
 - 1.2. Review and approve Purchase Requisition**

PO Print Report

- 1.3. Send report of PO Print orders**

Transmission

SSC Procurement Administrative Assistant

- 2. Transmission**
 - 2.1. Transmit PO?**

PO Print

- 2.2. Create PO PDF**
- 2.3. Download PO attachments (i.e., vendor quote and invoice)**
- 2.4. Identify vendor contacts**
- 2.5. Can vendor be contacted?**
- 2.6. Send PO to vendor and requester**
- 2.7. Send PO to requester**
- 2.8. Log transmission**
- 2.9. File transmission log**
- 2.10. Log decision not to send PO**

End

- 3. End**

PO Print

Procedure

Approval

SSC Procurement Administrative Assistant

1. Approval

1.1. Purchase Requisition at PO Print

- Purchase requisition arrives at the “**PO Print**” approver in the approval flow.
- [Go to step 1.2](#)

1.2. Review and approve Purchase Requisition

- Review purchase requisitions awaiting “PO Print” approval upon receipt of notification email.
- Approve without comment.
- [Go to step 2.1](#)

Note: If working PO Print as back-up and notification emails are not received, review and approve requests every two hours and once before leaving for the day.

PO Print Report

1.3. Send report of PO Print orders

- The PO Print report is obtained by filtering content received in automated email which includes all PO's that were approved the previous day.
- List is filtered to remove the following:
 - Status is “Ordered”
 - “Preferred Order Method” is **not** URL
 - PO is not flagged as a “confirming order”
- [Go to step 3](#)

Note: Report is created by eVA Compliance Officer. If issue occurs with report, contact eVA Compliance Officer.

Transmission

SSC Procurement Administrative Assistant

2. Transmission

2.1. Transmit PO?

- Determine whether the purchase order needs to be transmitted to the vendor. A purchase order must be sent to the vendor unless it's clear that no transmission is necessary.
 - If **YES**, [go to step 2.2](#)
 - If **NO**, [go to step 2.10](#)

Note: A purchase order should not be transmitted if any of the following are true:

- **The purchase order or purchase requisition has a comment from the end user instructing the SSC not to send the purchase order to the vendor**
- The purchase order indicates that the purchase will be made online through the Vendor's website

2.2. Create PO PDF

- View the purchase order in eVA
- Print it as a PDF file
- [Go to step 2.3](#)

2.3. Download PO attachments (i.e., vendor quote and invoice)

- Download all files that are present on the purchase order, including any that are present on the individual line items.
- Review files attached to the associated purchase requisition that aren't present on the purchase order. If any seem essential to the understanding of the purchase order, download those files as well.
- [Go to step 2.4](#)

Note: These are the files from the purchase requisition that were flagged to be "Visible to Supplier" and should be sent to the vendor together with the body of the purchase order.

2.4. Identify vendor contacts

- Identify one or more appropriate contacts who can receive the purchase order for the Vendor.
- The PO Print report may have an e-mail address listed for the purchase order — this entry is derived from the Vendor's "Ordering" contact in its eVA registration.
- A Vendor's eVA registration may also identify alternative contacts, such as the "Billing" or "Customer Service" contacts. These can be looked up using eVA's Report 101.
- Documentation attached to the purchase order / purchase requisition may contain contact information.
- Contact information for the Vendor can also sometimes be found by searching the Internet, either on the Vendor's website, or in another location.
- [Go to step 2.5](#)

2.5. Can vendor be contacted?

- If **YES**, [go to step 2.6](#)
- If **NO**, [go to step 2.7](#)

2.6. Send PO to vendor and requester

- Prepare an e-mail message using the appropriate template.
- Insert the purchase order number in the subject line.
- Attach the PDF copy of the purchase order and the attachments (i.e., quote and invoice) previously downloaded.
- Send the message to the vendor contact(s) previously identified, and copy the message to the requester.
- [Go to step 2.8](#)

2.7. Send PO to requester

- Prepare an e-mail message using the template indicating that the purchase order can't be sent to the Vendor.

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- Insert the purchase order number in the subject line.
- Attach the PDF copy of the purchase order and the attachments previously downloaded.
- Send the message to the requester.
- [Go to step 2.8](#)

2.8. Log transmission

- Record the transmission in the PO Print spreadsheet.

If:	Then:
More purchase orders remain on the PO Print report	Go to step 2.1
All purchase orders on the PO Print report have been handled	Go to step 2.9

2.9. File transmission log

- When all purchase orders have been handled, file the spreadsheet as a transmission log in the Procurement network drive.
- [Go to step 3](#)

2.10. Log decision not to send PO

- Record the decision to make no transmission in the PO Print spreadsheet.

If:	Then:
More purchase orders remain on the PO Print report,	Go to step 2.1
All purchase orders on the PO Print report have been handled,	Go to step 3

End

3. End

- The process is complete.

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Business Rule

Purchase orders are automatically routed to eVA's "PO Print" queue for vendors that are not registered to receive orders electronically through eVA. SSC will manually transmit "PO Print" purchase orders to their respective vendors, unless transmission is deemed unnecessary.

Institution Responsibility:

- Inform SSC when a purchase order should not be transmitted to the vendor.
- Determine how to proceed when no contact information is available for the selected vendor.

SSC Responsibility:

- Assess whether a "PO Print" purchase order needs to be sent to the vendor
- Identify the most appropriate means of manually transmitting the purchase order to the vendor and transmit the order that way
- Notify the Institution when the order has been transmitted manually
- Notify the Institution when no contact information is available for the selected vendor

Approvals

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Approved by – Procurement Service Line Leader

SSC Line of Service

Procurement Purchasing

Version Control

Version 1.0:

- **Author/Editor** – Kara Stewart
- **Change** – First published version
- **Approvals** – Michele Canull, Process Council, Management Council
- **Date** – December 20, 2019

Version 2.0:

- **Author/Editor** – Michele Johnson
- **Change** – Updated Help Center to Customer Engagement
- **Approvals** – Stephanie Barton
- **Date** – December 4, 2020

Version 3.0:

- **Author/Editor** – Michele Johnson
- **Change** – New eVA updates (reporting change) and format update
- **Approvals** – Ken Kapko, Michele Canull
- **Date** – February 6, 2024