



# Purchase Request SOP

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## A. PURPOSE

This standard Operating Procedure (SOP) establishes uniform procedures for the purchase request process.

## B. SUMMARY OF METHODS

All purchases must go through the purchase request process. At SETi, the purchase request includes a purchase request, management approval, purchasing approval, ordering, and receiving.

## C. DEFINITIONS

### Common Terms

#### *Purchase Request*

A formal request that initiates the process of acquiring goods or services for an organization. It is the first step in the procurement process. A purchase request includes a title, description (Reason for Purchase), items to be purchased, quotes, and any other relevant information.

#### *Purchase Order*

A formal order to be sent to the supplier to request goods or services. The purchase order in the context of SETi also includes formal recognition that the order has been made.

#### *Purchase Request /Order Action Descriptions*

| Action         | Description   |
|----------------|---|
| Create New     | Create a new purchase request   |
| Modify         | Modify an existing request before it is ordered.  |
| Cancel         | Cancel an existing request before it is ordered. Canceling a request deletes it and notifies the appropriate parties. |
| Reorder        | Reorder an existing request. Will open the request form with all fields filled out except the approver                |
| Approve/Reject | Approve/Reject an existing request before it is ordered. Rejected requests will not be deleted.                       |
| Order          | Order an approved request.  |
| Check-in       | Check-in a request/purchase order   |

*Table 1: Available Actions*

|                  |                                   |                                   |
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*Purchase Request/Order Action by Role and Request State*

Note that Approver and Purchaser roles inherit Requester actions for the requests they create.

| User Role | Request State  | Actions        |
|-----------|----------------|----------------|
| Requester | None           | Create New     |
|           | Needs Approval | Modify, Cancel |
|           | Approved       | Modify, Cancel |
|           | Ordered        | Reorder        |
|           | Delivered      | Reorder        |
|           | Rejected       | Reorder        |
| Approver  | Needs Approval | Approve/Reject |
|           | Approved       | Approve/Reject |
|           | Ordered        | N/A            |
|           | Delivered      | N/A            |
|           | Rejected       | N/A            |
| Purchaser | Needs Approval | N/A            |
|           | Approved       | Order, Cancel  |
|           | Ordered        | Check-in       |
|           | Delivered      | N/A            |
|           | Rejected       | N/A            |

Table 2: Actions available to roles by request state

*Purchase Request System Roles*

| Role      | Description  |
|-----------|--|
| Requester | Standard purchase request system User. Create and Edit purchase requests |
| Approver  | Manager role. Approve/Reject Requests                                    |
| Purchaser | Procurement manager. Purchases (Orders) and receives orders.             |

Table 3: Purchase Request System Roles



## Website Overview

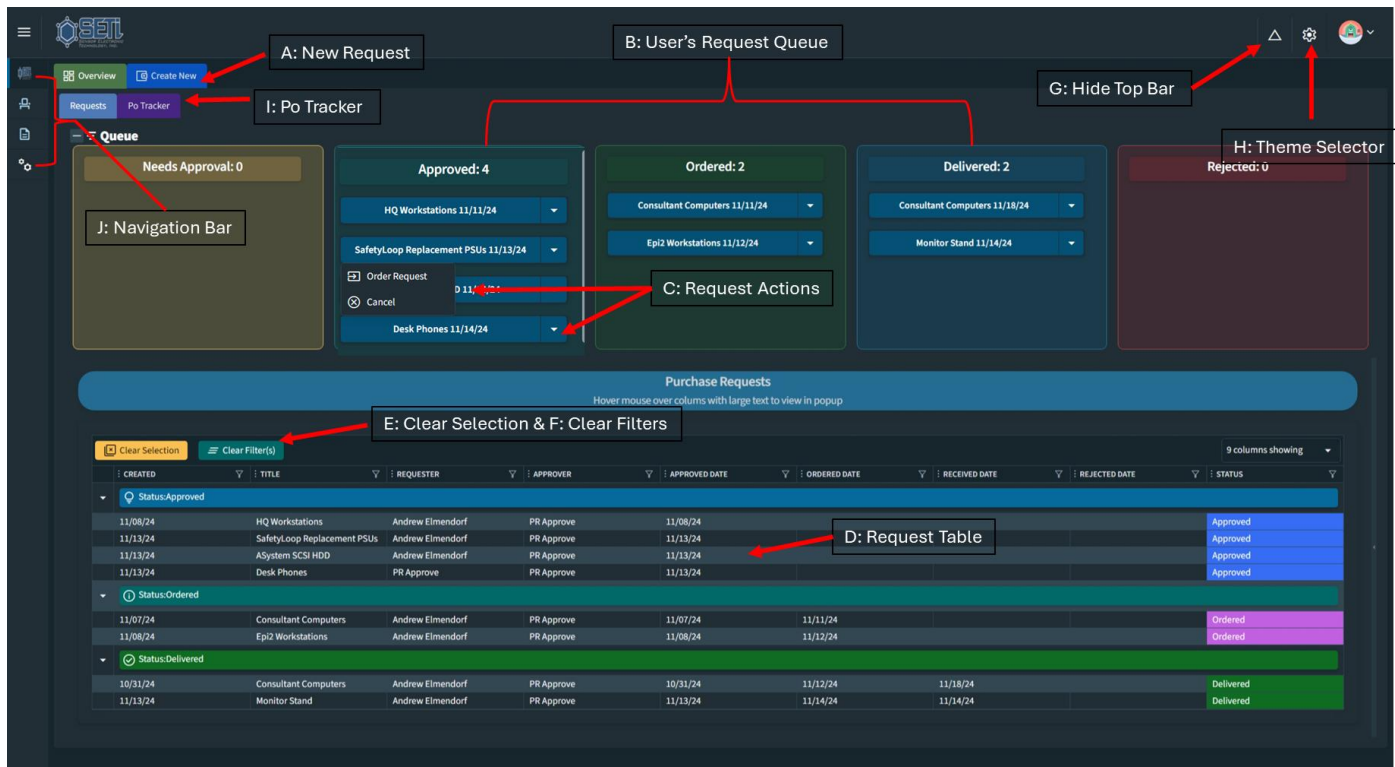


Figure 1: Shows the main user dashboard with a key area labeled

### A: New Request Page:

- Start new purchase request

### B: User Request Queue

- Shows requests separated by request state.
- Clicking on a request in the queue will open a side pane with selected request details; see Figure 2.
- Clicking the down icon on a request in the queue will open a menu. See C for details
- Requests shown are limited to the user's role and request made by the user.
  - Requester: Requests created by the user
  - Approver: Requests created by the user and requests where the user is designated as the approver
  - Purchaser: Requests created by the user, requests waiting for purchase, and purchased/received request
- Delivered requests will only show for 7 days after they are received

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### C: Request Actions:

- The requests in the request queue are a drop-down menu with actions related to the request state and the user's role. For action details, see [Purchase Request/Order Action by Role and Request State](#)

### D: Request Table:

- Shows the same requests as in the Request Queue.
- Left-clicking a request will open a side pane with the selected request details
- Right-clicking the request will show the available actions to the users. See Table 1 for details

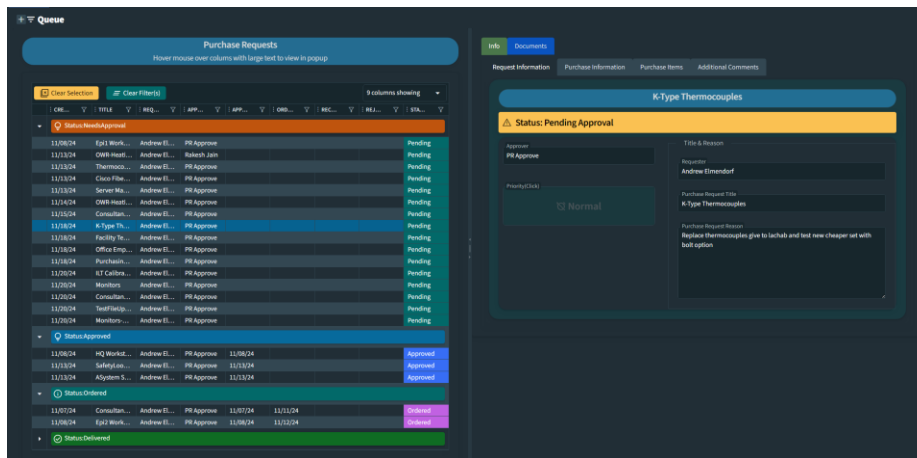


Figure 2: Selected request details inside pane

- Each column allows sorting and filtering
- More columns are available through the column selector shown in Figure 3

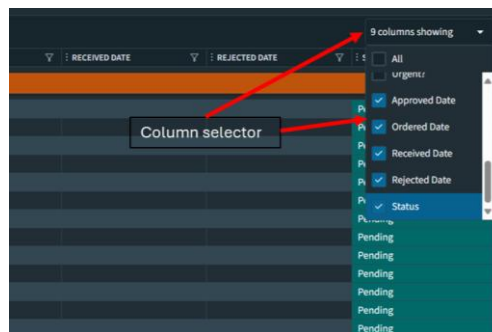


Figure 3: Column selector and drop-down menu

### E: Clear Select

- Clears the selected request and resets the dashboard UI layout

### F: Clear Filters

- Clears all column filters

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### G: Hide Top Bar

- Hides the top bar for a better vertical viewing experience
- After hiding the top bar menu will move to the left-hand navigation side bar, see Figure 4

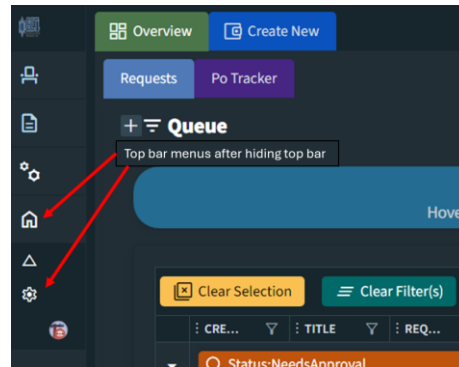


Figure 4: Top bar menu location after hiding the top bar

### H: Theme Selector

- Opens a sidebar with the available application themes.

### I: Po Tracker:

- Opens to the Po Tracker table shown in Figure 5
- Requests will show here once the requests have been ordered.
- Purchase orders will stay here until 7 days after delivery

| Po Tracker |            |                  |               |                      |          |           |            |          |              |                     |               |           |
|------------|------------|------------------|---------------|----------------------|----------|-----------|------------|----------|--------------|---------------------|---------------|-----------|
| REQ. DATE  | DEPARTMENT | REQUESTER        | PURCHASE TYPE | DESCRIPTION          | PRIORITY | ITEM TYPE | TO FINANCE | PO DATE  | PO#          | VENDOR              | CHECK-IN DATE | STATUS    |
| 10/31/2024 | Support    | Andrew Elmendorf | Purchase Card | The consultant co... | Urgent   | Other     | 10/31/24   | 11/12/24 | 2024-AE-0004 | Amazon.com          | 11/18/24      | Delivered |
| 11/13/2024 | Support    | Andrew Elmendorf | Purchase Card | The consultant co... | Urgent   | Other     | 11/13/24   | 11/14/24 | 2024-AE-0007 | A AND C MACHINE...  | 11/14/24      | Delivered |
| 11/7/2024  | Epi        | Andrew Elmendorf | Purchase Card | The consultant co... | Normal   | Other     | 11/07/24   | 11/11/24 | 2024-AE-0003 | Big Red Box LLC     |               | Open      |
| 11/8/2024  | Epi        | Andrew Elmendorf | Purchase Card | The consultant co... | Normal   | Other     | 11/08/24   | 11/12/24 | 2024-0005    | Dominion Energy ... |               | Open      |

Figure 5: Po Tracker table

### J: Navigation Menu

See Figure 6 for the expanded navigation menu. Click the three stack lines in the top rightmost corner to expand the navigation menu. When the navigation menu collapses to only icons, hover the mouse over an icon to view the tooltip.

- **Dashboard:** Home page
- **Requests Query:** Purchase requests table with requests from all users.
- **Quotes:** All quotes from every user and purchase request
- **Vendors:** Table with all vendors. Can add or edit a vendor here

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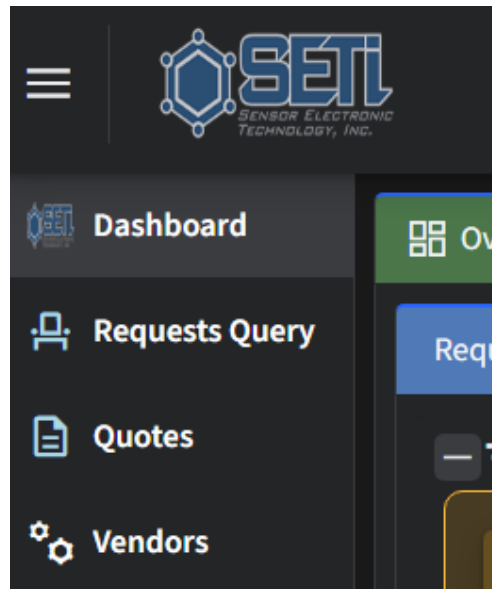


Figure 6: Navigation menu with menu expanded to icons and text

## D. SAFETY

Not Applicable

## E. PERSONNEL QUALIFICATIONS

Personal must be assigned a purchase request system role before they can use the software

## F. PROCEDURES

### First Login

1. Open the browser and go to <http://purchasing.seti.com>
2. Enter your SETi domain credentials then press enter or the “Login” button
  - a. Only enter the username. The username input does not require the domain.

Figure 7: Login form

|           |                            |                            |
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3. After you press the enter or login button, a popup window will appear with your user profile information. Fill out the information; see Figure 8.
  - a. Select an avatar from the “Avatar” selector
  - b. Verify the email address in the “Email” field
    - i. Press the “Test Email” button to test the email address
  - c. Verify your first and last name in the “First Name” and “Last Name” fields
  - d. (Optional) Select a default approver and a default department in the “Approver” and “Department” fields

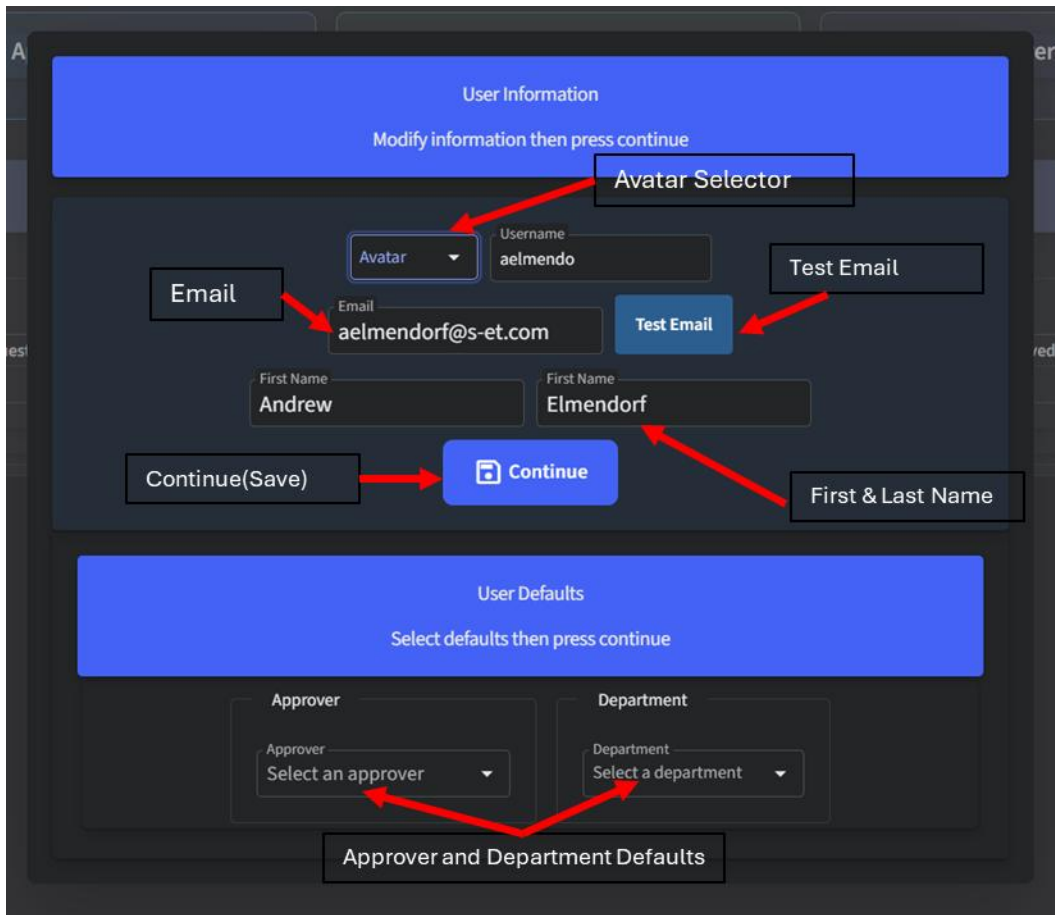


Figure 8: Registration form

4. Press the “Continue” button to save.

## General Website Procedures

### Access User Actions

1. Open the browser and go to <http://purchasing.seti.com>

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2. With the purchasing system open on the home page, select one of the following three locations to view the available user actions
  - Location 1: On the request queue, select the downward-facing triangle on the desired purchase request. A drop-down menu will appear with the available actions. See Figure 9, an example of purchase request actions. For the available actions by role and request status, See [Purchase Request/Order Action by Role and Request State](#) for actions available by role and state

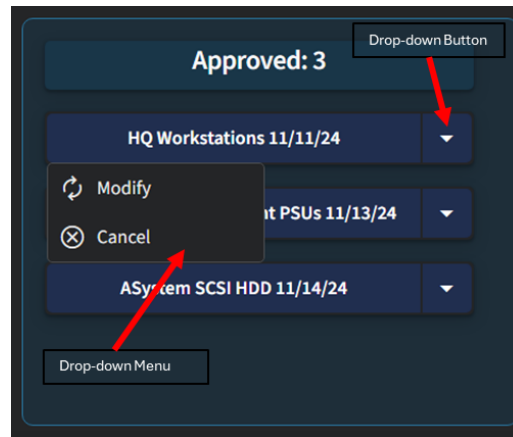


Figure 9: Approved state on the request queue. Demonstrating the pop-up menu of the "HQ Workstations 11/11/23" request

- Location 2: On the purchase request table, right-click the row of the desired purchase request. As shown in Figure 10, a pop-up menu will display the available actions corresponding to the request's status. See [Purchase Request/Order Action by Role and Request State](#) for actions available by role and state

|          |              |                              |                  |            |
|----------|--------------|------------------------------|------------------|------------|
| 11/13/24 | Selected Row | Server Management Software   | Andrew Elmendorf | PR Approve |
| 11/14/24 |              | OWR-Heating Pads-Reneat-2... | Andrew Elmendorf | PR Approve |
| 11/15/24 |              | Consultant C                 | Andrew Elmendorf | PR Approve |
| 11/18/24 |              | K-Type Ther...               | Andrew Elmendorf | PR Approve |
| 11/18/24 | Pop-up Menu  | Facility Tech. Computer      | Andrew Elmendorf | PR Approve |
| 11/18/24 |              | Office Employee Computer     | Andrew Elmendorf | PR Approve |

Figure 10: Purchase request table right-click context menu

- Location 3: On the purchase request table, click on the row corresponding to the purchase request an action is to be performed. A side panel window will open with the purchase request details, as shown in Figure 11. See [Purchase Request/Order Action by Role and Request State](#) for actions available by role and state

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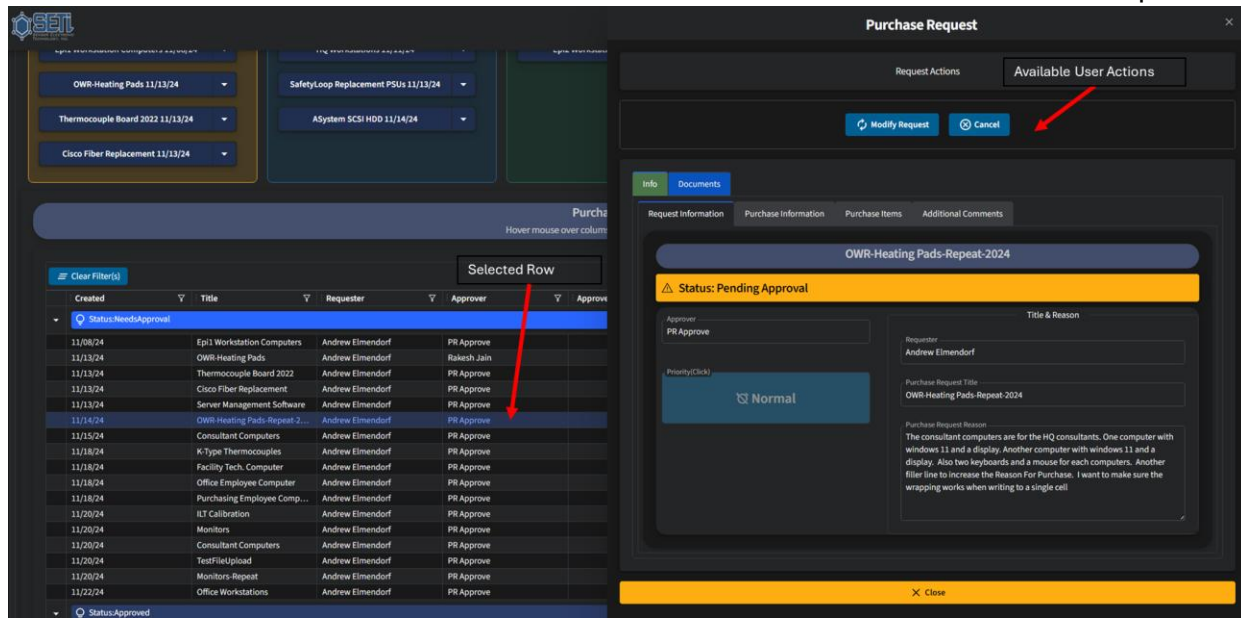


Figure 11: Purchase request details with available actions

- Location 4: On the request query page, right-click on the row corresponding to the purchase request an action is to be performed on. A pop-up menu will display the “Repeat Request” action.

#### View All Purchase Requests from All Users

1. Open the browser and go to <http://purchasing.seti.com>
2. On the left-hand side, select the “Request Query” icon to navigate to the request query page. See [Definitions-Website Overview-J: Navigation Menu](#)
  - Hover your mouse over the icons to view the name
  - Click the three vertical lines at the top to expand the navigation menu so it displays icons and text
3. The table displays all purchase requests from all users. To filter the table, click the filter icon of the desired column.

#### View All Quotes from All Users

1. Open the browser and go to <http://purchasing.seti.com>
4. On the left-hand side, select the “Quotes” icon to navigate to the quotes page. See [Definitions-Website Overview-J: Navigation Menu](#)
  - Hover your mouse over the icons to view the name
  - Click the three vertical lines at the top to expand the navigation menu, so it displays icons and text
2. All quotes can be found on the displayed table
  - Filter the table by clicking the filter icon on the desired column

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- To view or download a quote, right-click a row to display a pop-up menu

### Repeat Another User's Previous Request

1. Open the browser and go to <http://purchasing.seti.com>
2. On the left-hand side, select the "Request Query" icon to navigate to the request query page.

#### Definitions-Website Overview-J: Navigation Menu

- Hover your mouse over the icons to view the name
  - Click the three vertical lines at the top to expand the navigation menu, so it displays icons and text
3. On the requests table, right-click the row corresponding to the request that needs to be repeated and select "Repeat Request." See [Access User Actions](#) for help locating the action menu.
  4. The new purchase request form will open with all the information filled out except the title, approver, and additional email recipients. Follow the instructions detailed in [Requester Action Procedures-Create Purchase Request](#)

### Add or Edit a Vendor

A vendor can be edited or created while creating a new purchase request or separately on the vendor's page. To create a vendor while creating a purchase request, follow the [Requester Action Procedures-Create Purchase Request](#) procedure.

1. Open the browser and go to <http://purchasing.seti.com>
2. On the left-hand side, select the "Vendors" icon to navigate to the request query page. See [Definitions-Website Overview-J: Navigation Menu](#)
  - Hover the mouse over the icons to view the name
  - Click the three vertical lines at the top to expand the navigation menu, so it displays icons and text
3. The table displays all the available vendors, see Figure 12.
  - To filter, click the filter button on a column
4. Add or Edit
  - To Add a vendor, click the "Add Vendor" button on the top right-hand side of the table
    - I. A pop-up form will appear. Fill out the information, then click the "Save" button
  - To edit a vendor, click the edit button on the row corresponding to the vendor to be edited

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Filter Button

Add Vendor Button

Edit Button

| Name                         | Email | Contact    | Phone #        | Fax # | Street Address                  | City                          | State | Zip        |  |
|------------------------------|-------|------------|----------------|-------|---------------------------------|-------------------------------|-------|------------|--|
| 360Brands Inc                |       | Brent Bodi |                |       | PO Box 2478                     | Mt. Pleasant                  | SC    | 29465      |  |
| A & R Power and Controls LLC |       | AP         | 26-3262844     |       | 108 Railroad Ave                | Lexington                     | SC    | 29072      |  |
| A AND C MACHINE              |       |            | 803-860-1805   |       |                                 | Stratham                      | SC    |            |  |
| A AND C MACHINE, LLC         |       |            | 803-860-1805   |       | 269 Robbie Road                 | Lexington                     | SC    | 29073      |  |
| ABB Inc.                     |       | AP         |                |       | 305 Gregson Dr                  | Cary                          | NC    | 27511      |  |
| ACOS Enterprises LLC         |       | AP         | 678-624-0949   |       | PO Box 746832                   | Atlanta                       | GA    | 30374-6832 |  |
| Action Tech                  |       | James Kimo | 82-31-286-2601 |       | Suji-gu, Yongin-si, Gyeonggi... | 403-402 Sinbong 3-ro 12 be... | 09    | 16808      |  |
| Adura Led Solutions LLC      |       | Deannae Ch | 714-660-2944   |       | 511 Princeland Court            | Corona                        | CA    | 92879      |  |
| ADVACO                       |       |            | 410-876-8200   |       |                                 |                               | MD    |            |  |
| ADVANCE                      |       |            |                |       | Willows Industrial Park         | North Andover                 | MA    |            |  |

1 2 3 4 5

Figure 12: Vendor table with various buttons pointed to

## Change the Website Theme

1. Open the browser and go to <http://purchasing.seti.com>
2. On the top right-hand side, click the cog icon
3. A side panel will appear with the available themes. See Figure 13.
  - It is recommended to use the default “Standard Dark” theme or the “Dark” theme. The app was designed around these two themes

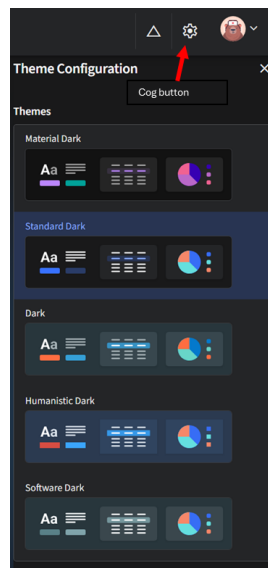


Figure 13: Theme selector

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## Hide the Top Bar

Hiding the top bar can be useful if there are too many scroll bars. The app was designed such that it was not necessary to hide the top bar, but at times, it can still be useful

1. Open the browser and go to <http://purchasing.seti.com>
2. On the top right-hand side, click the upward-facing triangle button, see Figure 14.

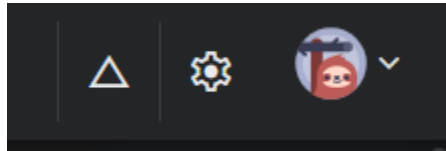


Figure 14: Top bar menu

3. The top bar will hide, and the menu will be moved to the right-hand side navigation bar.
4. To un-hide the top bar, click the “Top Bar Menu” button to show a drop-down menu. See Figure 15.
5. Click the upward-pointing triangle to un-hide the top bar.

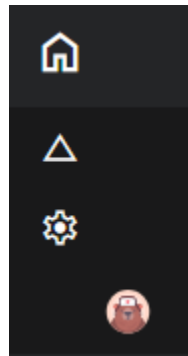


Figure 15: Top bar menu on the navigation menu

## Requester Action Procedures

### Create Purchase Request

#### Introduction

Creating a purchase request is broken down into five steps. The steps are Request Information, Purchase Information, Purchase Items, Comments & Quotes, and Finalize. Each step requires certain information; prepare the following before starting a purchase request.

- Know your approver
  - Usually, your direct manager
- A descriptive title
- Detailed reason for purchase
- What department
  - If you are unsure, use your best guess. The approver can change the department
- Shipping Method/Freight

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- Default is Ground. The purchaser will make the final decision
- Vendor
  - You can create a new Vendor (shown in the following steps) and in [General Action Procedures-Add or Edit a Vendor](#). The bare minimum is the Vendor name and email address, but please include as much information as possible
- Purchase Items
  - Quantity, Product Description/Number, Link (Strongly recommended), Unit Cost
- Quotes
  - Any quotes supplied by the vendor for the items being purchased

## Procedure

3. Open the browser and go to <http://purchasing.seti.com>
4. Select the “Create New” tab on the dashboard
  - See the [Website Overview-New Request Page](#) section for an overview of the dashboard
5. Enter the requested information with the purchase request form opened and “Step 1 (Request Information)” selected. See Figure 16 for an example of a filled-out form
  - Select the approver from the “Select Approver” drop-down list
  - Set the priority (Default Normal) by clicking the “Priority (Click)” button field
    - I. Only mark the urgent if the request needs to be approved and ordered on the same day as the request was submitted
  - Enter the purchase request title in the “Purchase Request Title” field
  - Enter the reason for purchasing in the “Purchase Request Reason” field

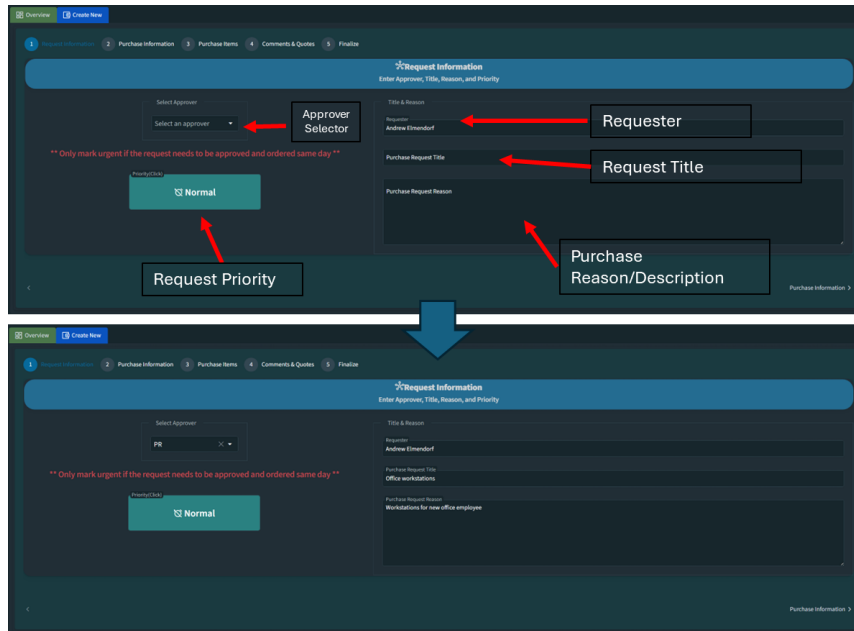
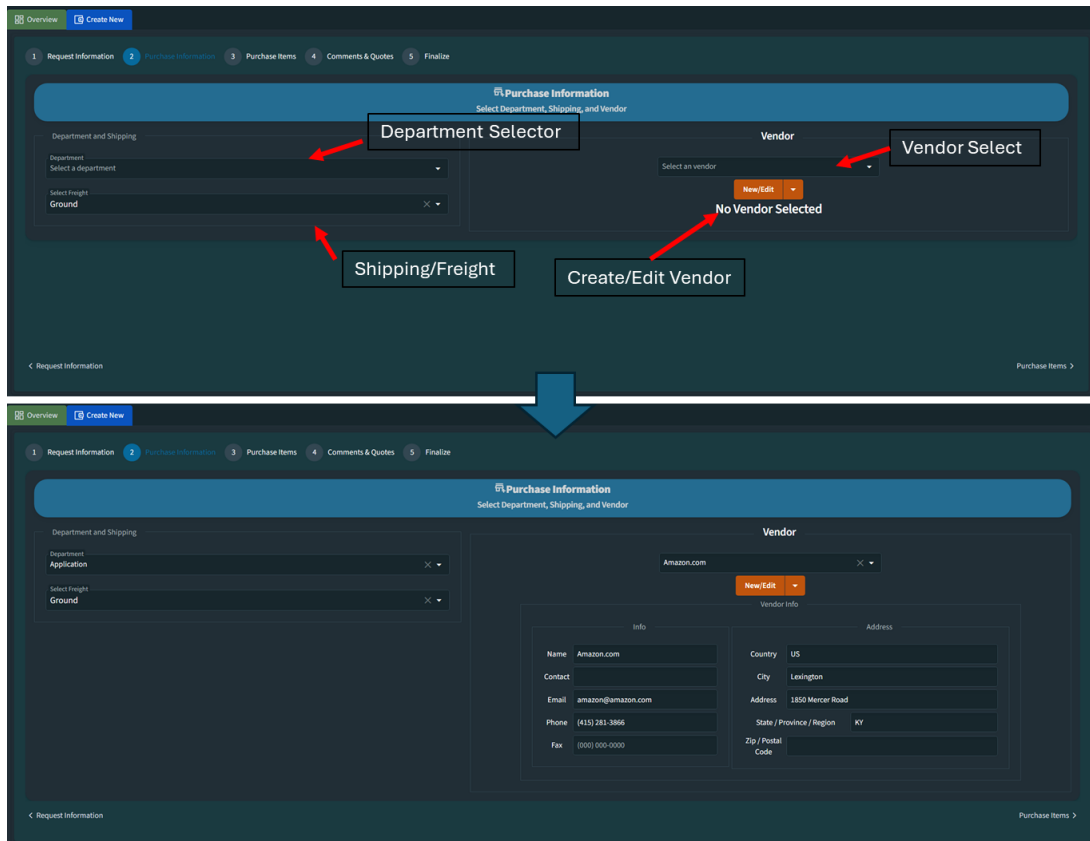


Figure 16: Step 1 of the purchase request form. Shows an empty form with labels and a correctly filled-out form

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6. To proceed to the next step, select “Step 2 (Purchase Information)” at the top of the form or click the “Purchase Information” link at the bottom.
7. Enter the requested information. See Figure 17 for an example of a filled-out form
  - Select the department from the “Department” drop-down list
    - I. If you are unsure, use your best guess. The approver will verify the department
  - Select Freight/Shipping method from the “Select Freight” drop-down list
    - I. Default is Ground. The purchaser will make the final decision when ordering
  - Select the vendor from the “Vendor” Field
    - I. If the vendor is unavailable, pick the “Create New” option from the “New/Edit” drop-down menu. A pop-up form will appear; fill out the information, then press the “Save” button
      - The minimum required vendor information is a vendor name, but for the benefit of all users, please provide as much information as possible.
    - II. Pick the “Edit” option from the drop-down menu if the vendor lacks information. A pop-up form will appear; fill out the missing information, then press the “Save” button



The figure consists of two screenshots of the 'Purchase Information' form. The top screenshot shows the empty form with labels for 'Department Selector', 'Shipping/Freight', 'Vendor Select', and 'Create/Edit Vendor'. The bottom screenshot shows the form filled out with 'Department: Application', 'Select Freight: Ground', 'Vendor: Amazon.com', and detailed vendor information.

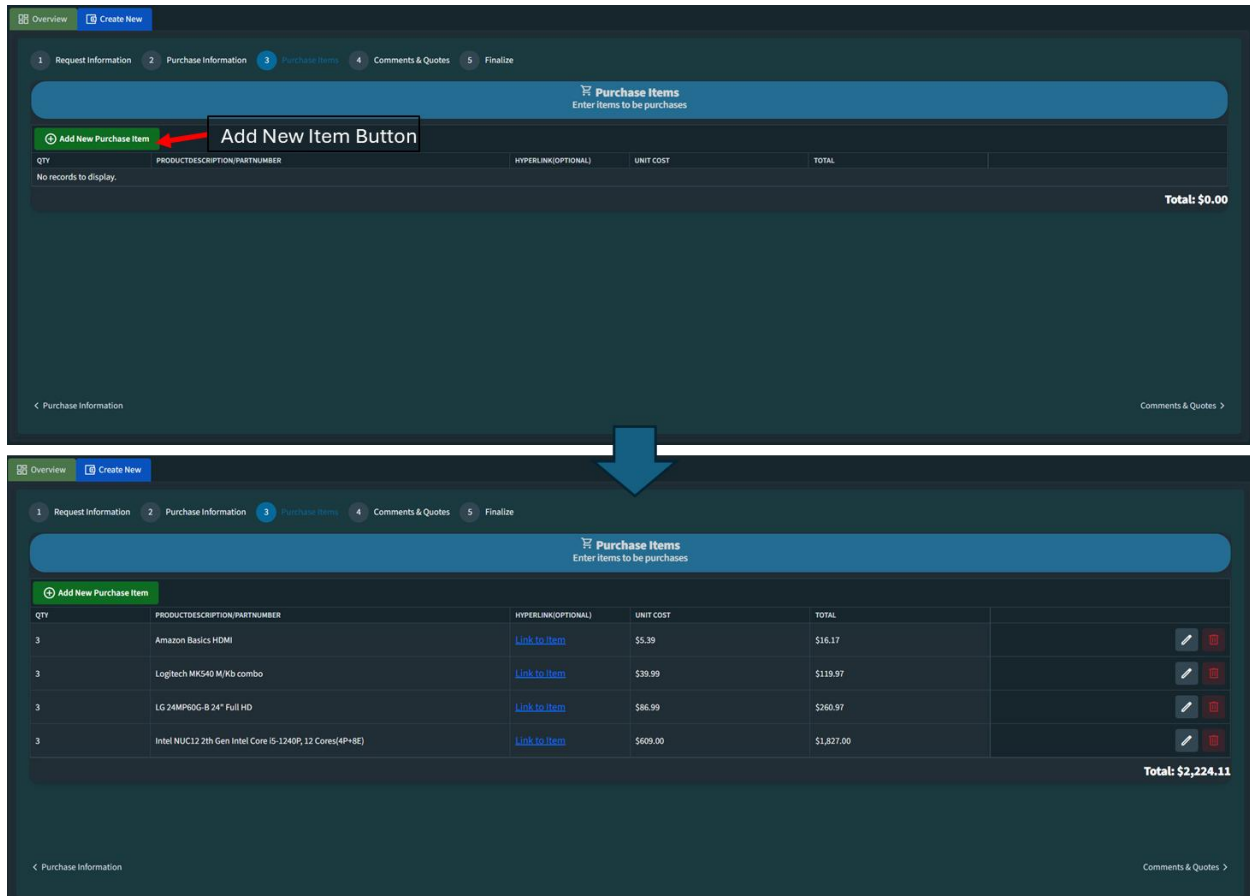
Figure 17: Step 2 (Purchase Info), show the empty form followed by the form filled out

8. To proceed to the next step, select “Step 4 (Purchase Items)” at the top of the form or click the “Purchase Items” link at the bottom.

|                  |                                   |                                   |
|------------------|-----------------------------------|-----------------------------------|
| <b>SET, Inc.</b> | <b>Name:</b> Purchase Request SOP | <b>Revision Date:</b><br>12/03/24 |
| <b>No:</b>       |                                   | <b>Page 18 of 34</b>              |

9. Enter the requested information. See Figure 18 for an example of a filled-out form

- Click “Add New Purchase Item” Button
- Enter the “Quantity”, “Item description”, “Hyperlink”, and “Unit Cost”
  - I. The hyperlink is optional, but it is strongly recommended. This makes it much easier for the purchaser to quickly find the item
- Click the green check button on the right to save the changes



**Purchase Items**  
Enter items to be purchases

**Add New Purchase Item** (Add New Item Button)

| QTY                    | PRODUCT DESCRIPTION/PARTNUMBER | HYPERLINK(OPTIONAL) | UNIT COST | TOTAL                |
|------------------------|--------------------------------|---------------------|-----------|----------------------|
| No records to display. |                                |                     |           |                      |
|                        |                                |                     |           | <b>Total: \$0.00</b> |

**Purchase Items**  
Enter items to be purchases

| QTY | PRODUCT DESCRIPTION/PARTNUMBER                           | HYPERLINK(OPTIONAL)          | UNIT COST | TOTAL                    |
|-----|--|------------------------------|-----------|--------------------------|
| 3   | Amazon Basics HDMI                                       | <a href="#">Link to Item</a> | \$5.39    | \$16.17                  |
| 3   | Logitech MK540 M/Kb combo                                | <a href="#">Link to Item</a> | \$39.99   | \$119.97                 |
| 3   | LG 24MP60G-B 24" Full HD                                 | <a href="#">Link to Item</a> | \$86.99   | \$260.97                 |
| 3   | Intel NUC12 2th Gen Intel Core i5-1240P, 12 Cores(4P+8E) | <a href="#">Link to Item</a> | \$609.00  | \$1,827.00               |
|     |  |                              |           | <b>Total: \$2,224.11</b> |

Figure 18: Step 4 (Purchase Items), show the empty form followed by the form filled out

10. To proceed to the next step, select “Step 4 (Comments/Quotes)” at the top of the form or click the “Comments/Quotes” link at the bottom.

11. Enter the requested information. See Figure 18 for an example of a filled-out form

- Enter any comments in the “Additional Comments” field
  - I. These should be anything extra the approver or purchaser might need to know. They will be appended to the email
- Upload any quotes by pressing the “+” icon button labeled “Add Quote”
  - I. Quotes must meet the following criteria
    - **Cannot** be encrypted
    - 10Mb or less

|                  |                                   |                                   |
|------------------|-----------------------------------|-----------------------------------|
| <b>SET, Inc.</b> | <b>Name:</b> Purchase Request SOP | <b>Revision Date:</b><br>12/03/24 |
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- Accepted file types: .pdf, .doc, .docx, .xls, .xlsx, .jpg, .jpeg, .png

The screenshot displays the 'Comments and Quotes' step of a purchase request form. The top section shows the empty form with 'Additional Comments' and 'Add Quote' buttons. The bottom section shows the form filled out with a comment and three quotes uploaded.

**Top Section (Empty Form):**

- Comments and Quotes:** Enter any additional comments and upload quotes.
- Additional Comments:** Additional message appended to the request.
- Add Quote:** Press the + button to add a quote. \*\* Files cannot be encrypted \*\*. Acceptable file types: pdf, doc, docx, xls,.xlsx, jpg, .jpeg, .png. Maximum file size: 10MB.

**Bottom Section (Filled Out Form):**

- Additional Comments:** See amazon shopping list, <http://shoppinglist.amazon.com>.
- Add Quote:** Press the + button to add a quote. \*\* Files cannot be encrypted \*\*. Acceptable file types: pdf, doc, docx, xls,.xlsx, jpg, .jpeg, .png. Maximum file size: 10MB.
- Uploaded Quotes:**
  - MonitorsQuote 2.pdf (Preview, X)
  - NormanComputerQuote.pdf (Preview, X)
  - XPS 15 9510.pdf (Preview, X)

Figure 19: Step 4(Comments & Quotes), show the empty form followed by the form filled out

- To proceed to the next step, select “Step 6 (Finalize)” at the top of the form or click the “Finalize” link at the bottom.
- Fix any errors in the “User Action Alerts” list.
- Review the email under the “Email Preview” tab and the purchase request pdf under the “Purchase Request Pdf” tab. See Figures 20 and 21.
- Once you are satisfied that all the information is correct and there are no errors, press the “Submit” button. See Figure 22 for an example of a properly fill-out form
  - An email will be sent to the selected Approver, the Requester, and any additional email(s) selected

|           |                            |                            |
|-----------|----------------------------|----------------------------|
| SET, Inc. | Name: Purchase Request SOP | Revision Date:<br>12/03/24 |
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**Finalize**  
Check the preview(s) before submitting

Submit/Cancel  
Submit Cancel Create

**User Action Alerts**

- Approver  
Approver not selected
- Department  
Department not selected

Email Recipients  
Emails will be sent to the following users:  
aelmendorf@s-et.com, Approver Email

**Approver and Requester Emails**

**Additional Emails(CC)**  
Users

- ☐ Purchase Req. Admin Admin : itsupport@s-et.com
- ☐ Rakesh Jain : rakesh@s-et.com
- ☐ Norman Culbertson : nculbertson@s-et.com
- ☐ Kevin Park : kevin.park@seoulsemicon.com
- ☐ PR Approve : itsupport@s-et.com
- ☐ Sharon Pace : space@s-et.com

**Email Preview**

**Approved Requested**

|                  |                      |
|------------------|----------------------|
| Purchase Request | Consultant Computers |
| Requester        | Andrew Elmendorf     |
| Approver         |                      |
| Link             | {prLink}             |

**Description:**  
The consultant computers are for the HQ consultants. One computer with windows 11 and a display. Another computer with windows 11 and a display. Also two keyboards and a mouse for each computers. Another filler line to increase the Reason For Purchase. I want to make sure the wrapping works when writing to a single cell

**Additional Comments:**  
See amazon shopping list. <http://shoppinglist.amazon.com>

Figure 20: Step 5 (Finalize) shows the final step with labels. This is also an example of a form with errors in the previous steps

**Request Preview**

Download

1 of 1

100%

**SETI** Purchase Request

Date Of Request: 11/22/2024  
Requester: Andrew Elmendorf  
Department: Support  
Vendor Name: Amazon.com  
Contact:  
Address: 1850 Mercer Road  
City/State/Zip: Lexington,KY,40511  
Phone: 415-281-3866  
Email:  
Description: Office Workstations  
Reason For Purchase  
Workstations for new office employees. Includes Monitor, Computer, Kb/M, and cables  
Delivery Method: Ground

| Qty | Product/Description                                      | Unit Price | Total      |
|-----|--|------------|------------|
| 3   | Intel NUC12 2th Gen Intel Core i3-1240P, 12 Cores(4P+8E) | \$609.00   | \$1,827.00 |
| 3   | LG 24MP60G-B 24" Full HD                                 | \$86.99    | \$260.97   |
| 3   | Logitech MK540 M/Kb combo                                | \$39.99    | \$119.97   |
| 3   | Amazon Basics HDMI                                       | \$5.39     | \$16.17    |
|     | Total  |            | \$2,224.11 |

Figure 21: Purchase Request Pdf

|           |                            |                            |
|-----------|----------------------------|----------------------------|
| SET, Inc. | Name: Purchase Request SOP | Revision Date:<br>12/03/24 |
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**Finalize**  
Check the preview(s) before submitting

Submit/Cancel  
Update Cancel Update

**User Action Alerts**  
Purchase Request  
Purchase Request is ready for submission

Email Recipients  
Emails will be sent to the following users:  
aelmendorf@s-et.com, ltsupport@s-et.com

**Additional Emails (CC)**  
Users  
Purchase Req. Admin Admin : ltsupport@s-et.com  
Rakesh Jain : rakesh@s-et.com  
Norman Culbertson : nculbertson@s-et.com  
Kevin Park : kevin.park@seoulsemicon.com  
PR Approve : ltsupport@s-et.com  
Sharon Pace : space@s-et.com

**Selected**  
Purchase Req. Admin Admin : ltsupport@s-et.com

**Email Preview**  
**Approved Requested**  
Purchase Request Office Workstations  
Requester Andrew Elmendorf  
Approver PR Approve  
Link {prLink}  
**Description:**  
Workstations for new office employees. Includes Monitor, Computer, Kb/M, and cables  
**Additional Comments:**  
See amazon shopping list. http://shoppinglist.amazon.com

Figure 22: Step 5 (Finalize), shows a properly filled out form ready for submission

## Modify Purchase Request

### Introduction

The user who created a purchase request can modify it until it is ordered. Approvers and Purchasers can alter various parts of the request during the approval and ordering processes. While a request is edited, it will be locked to other users. If another user attempts to perform any action on the same request, the other user will be notified that the request is locked by the user editing the request.

### Procedure

1. Open a browser window and navigate to <http://purchasing.seti.com>
2. The option for modifying the purchase request can be found on the request table, the request queue, or the request's detailed view. See [General Action Procedures-Access User Actions](#) to locate the menu
3. Follow the instructions detailed in [Requester Action Procedures-Create Purchase Request](#) to modify the request.
  - a. An email will be sent to the selected Approver, the Requester, and any additional email(s) selected

## Cancel Purchase Request

### Introduction

The user who created a purchase request can cancel it until the request has been ordered. Once a request has been ordered, the Purchaser can cancel it. While a request is edited, it will be locked to other

|                  |                                   |                                   |
|------------------|-----------------------------------|-----------------------------------|
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users. If another user attempts to perform any action on the same request, the other user will be notified that the request is locked by the user editing the request.

## Procedure

1. Open a browser window and navigate to <http://purchasing.seti.com>
2. The option for canceling a purchase request can be found on the request table, the request queue, or the request's detailed view. See [General Action Procedures-Access User Actions](#) to locate the menu
3. With the "Cancel Request" form open, enter a reason for cancellation in the "Cancellation Reason" field, see Figure 23
4. Select any additional users to be notified from the "Additional Emails (CC)" list
5. Review the email preview, then press submit
  - a. All appropriate users will be notified of the cancellation

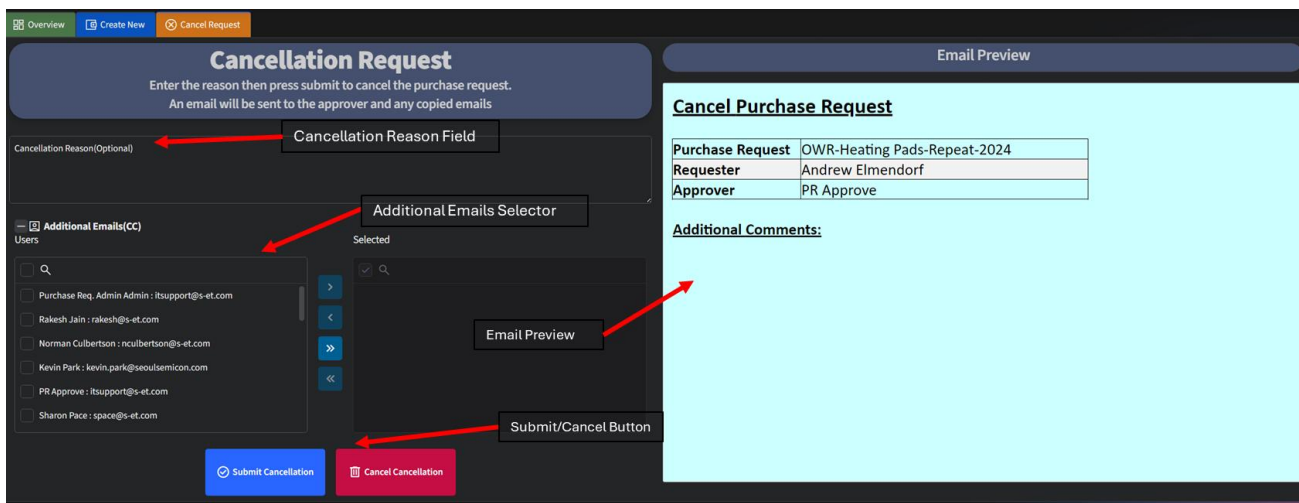


Figure 23: Cancellation Form

## Repeat Purchase Request

### Introduction

A user can repeat a request made by any user if the request is ordered, checked-in, or rejected.

### Procedure

1. Open a browser window and navigate to <http://purchasing.seti.com>
2. If the request to be repeated was made by another user or the request was delivered more than seven days ago, navigate to the "Request Query" page. See [Website Overview-Navigation Menu](#) for the navigation menu location
3. If the request to be repeated was made by the same user and the request was delivered within the last seven days, stay on the home page

|                  |                                   |                                   |
|------------------|-----------------------------------|-----------------------------------|
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6. With either the request query or home page open, locate the actions menu on the request query, request table, or the purchase request details page then select the “Repeat Request” option. See [General Action Procedures-Access User Actions](#) to locate the menu
4. The new purchase request form will open with all the information filled out except the title, approver, and additional email recipients. Follow the instructions detailed in [Requester Action Procedures>Create Purchase Request](#)

## Approver Action Procedures

### *Approve/Reject*

#### Introduction

A purchase request can be approved/rejected until it has been ordered. To approve/reject a purchase request, the user must have the Approver role. While a request is edited, it will be locked to other users. If another user attempts to perform any action on the same request, the other user will be notified that the request is locked by the user editing the request.

#### Procedure

1. Open a browser window and navigate to <http://purchasing.seti.com>
2. The option for approving/rejecting a purchase request can be found on the request table, the request queue, or the request’s detailed view. See [General Action Procedures-Access User Actions](#) to locate the menu
3. With the Approve/Reject Request form open, select the action from the “Select Action” field. See Figure 24.
4. Verify the department in the “Select Department” field.
5. Select any additional users to be modified from the “Additional Email (CC)” selector

|                  |                                   |                                   |
|------------------|-----------------------------------|-----------------------------------|
| <b>SET, Inc.</b> | <b>Name:</b> Purchase Request SOP | <b>Revision Date:</b><br>12/03/24 |
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Approve/Reject Form  
Select action then press submit

1 Approve/Reject Form 2 Finalize

Action Field

Select Action

Department Field

Select Department

Email Recipients

Emails will be sent to the following users:  
space@s-et.com , itsupport@s-et.com , aelmendorf@s-et.com , itsupport@s-et.com

Default Emails Recipients

Additional Emails(CC)

Users

Selected

Comments

Approval/Rejection Comments

< Previous Finalize >

Figure 24: Approval Reject Form with comments

6. Proceed to the next step by selecting “Step 2 (Finalize)” at the top of the form or click the “Finalize” link at the bottom.
7. Review the email preview, then press submit; see Figure 25.
  - a. All purchasers will be notified
  - b. All appropriate users will be notified of the selected action
  - c. When a request is rejected, it is **not** deleted. The request will be visible on the dashboard for three days. After three days, the request will be available on the “Request Query” page. See [Website Overview-Navigation Menu](#) for location.

|           |                            |                            |
|-----------|----------------------------|----------------------------|
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Approve/Reject Form  
Select action then press submit

1 Approve/Reject Form 2 Finalize

Submit/Cancel

Submit Cancel

Email Preview

**Request Approved -- Needs Order**

|                  |                             |
|------------------|-----------------------------|
| Purchase Request | SafetyLoop Replacement PSUs |
| Requester        | Andrew Elmendorf            |
| Approver         | PR Approve                  |
| Link             | {prLink}                    |

**Approve Comments**

< Form Next >

Figure 25: Approve/Reject form-finalize view

## Purchaser Action Procedures

### Order

#### Introduction

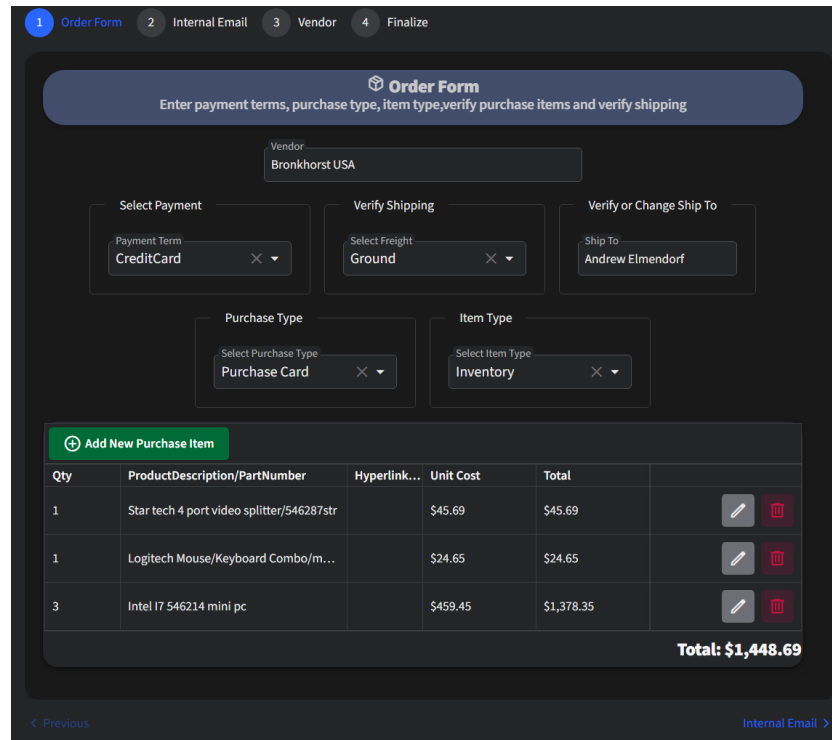
Once approved, a purchase request can be ordered. To order a purchase request, the user must have the Purchaser role. While a request is being edited, it will be locked to other users. If another user attempts to perform any action on the same request, the other user will be notified that the request is locked by the user editing the request.

#### Procedure

1. Open a browser window and navigate to <http://purchasing.seti.com>
2. The option for ordering a purchase request can be found on the request table, the request queue, or the request's detailed view. See [General Action Procedures-Access User Actions](#) to locate the menu
3. With the "Order Request" form opened to "Step 1 (Order Form)", select the payment option from the "Select Payment" drop-down, see Figure 26.
4. Modify the shipping method/freight from the "Verify Shipping" drop-down list
5. Verify the "Ship To" entry.
  - a. Default is the requester
6. Select the purchase type from the "Purchase Type" drop-down list
7. Select the item type from the "Item Type" drop-down list
8. Verify the items to be purchased in the purchase items table.

|           |                            |                            |
|-----------|----------------------------|----------------------------|
| SET, Inc. | Name: Purchase Request SOP | Revision Date:<br>12/03/24 |
| No:       |                            | Page 26 of 34              |

- a. Modify by clicking the pen icon on the row to be modified
- b. Delete by clicking the red trash can icon on the row to be deleted



**Order Form**  
Enter payment terms, purchase type, item type, verify purchase items and verify shipping

Vendor: Bronkhorst USA

Select Payment: Payment Term: CreditCard







Verify Shipping: Select Freight: Ground

Verify or Change Ship To: Ship To: Andrew Elmendorf

Purchase Type: Select Purchase Type: Purchase Card

Item Type: Select Item Type: Inventory

**Add New Purchase Item**

| Qty | ProductDescription/PartNumber             | Hyperlink... | Unit Cost | Total                    |   |
|-----|---|--------------|-----------|--------------------------|---|
| 1   | Star tech 4 port video splitter/546287str |              | \$45.69   | \$45.69                  |   |
| 1   | Logitech Mouse/Keyboard Combo/m...        |              | \$24.65   | \$24.65                  |   |
| 3   | Intel I7 546214 mini pc                   |              | \$459.45  | \$1,378.35               |   |
|     |   |              |           | <b>Total: \$1,448.69</b> |   |

< Previous Internal Email >

Figure 26: Order form

9. Select “Step 2 (Internal Emails)” at the top of the form or click the “Internal Emails” link at the bottom of the form to proceed to the next step (see Figure 27).
10. Select any additional users to be notified from the “Additional Emails (CC)” list
  - a. The requester, approver, and purchaser will be notified by default. This is specified above the “Additional Emails (CC)” list in the field labeled “Email Recipients”

|           |                            |                            |
|-----------|----------------------------|----------------------------|
| SET, Inc. | Name: Purchase Request SOP | Revision Date:<br>12/03/24 |
| No:       |                            | Page 27 of 34              |



1 Order Form 2 Internal Email 3 Vendor 4 Finalize

**Internal Email Settings**  
Check recipients and add any additional emails needed

Email Recipients

Emails will be sent to the following users:  
itsupport@s-et.com, aelmendorf@s-et.com, itsupport@s-et.com

Additional Emails(CC)

Users

Selected

< Order Form Vendor >

Figure 27: Internal Email Settings

11. Select “Step 3” at the top of the form or click the “Vendor” link at the bottom of the form to transition to the next step
12. If an external email will be sent, click the check box “Send Vendor Email?”, see Figure 28
  - a. Click the “Include Internal Emails?” to copy the requester, approver, and any additional emails to the external email
  - b. Verify/Enter the vendor email
  - c. Verify/Enter the CC emails
  - d. Enter the email subject
  - e. Press the mail icon “Click to open Outlook” to open outlook with the filled-out information pasted into a new email
  - f. If the PO and quotes are needed, select the “Po Preview” and/or “Quotes” tab(s) then click the download icon labeled “Download” to download the document(s) to the desktop
13. Verify the vendor’s information and modify if needed, See Figure 28.
  - a. To modify the vendor, click the drop-down icon on the “New/Edit” button and select “Edit”. A pop-up form will appear with the current information already filled out
  - b. Fill out the form as necessary
  - c. Press the “Save” button to save or the “Cancel” button to cancel

|           |                            |                            |
|-----------|----------------------------|----------------------------|
| SET, Inc. | Name: Purchase Request SOP | Revision Date:<br>12/03/24 |
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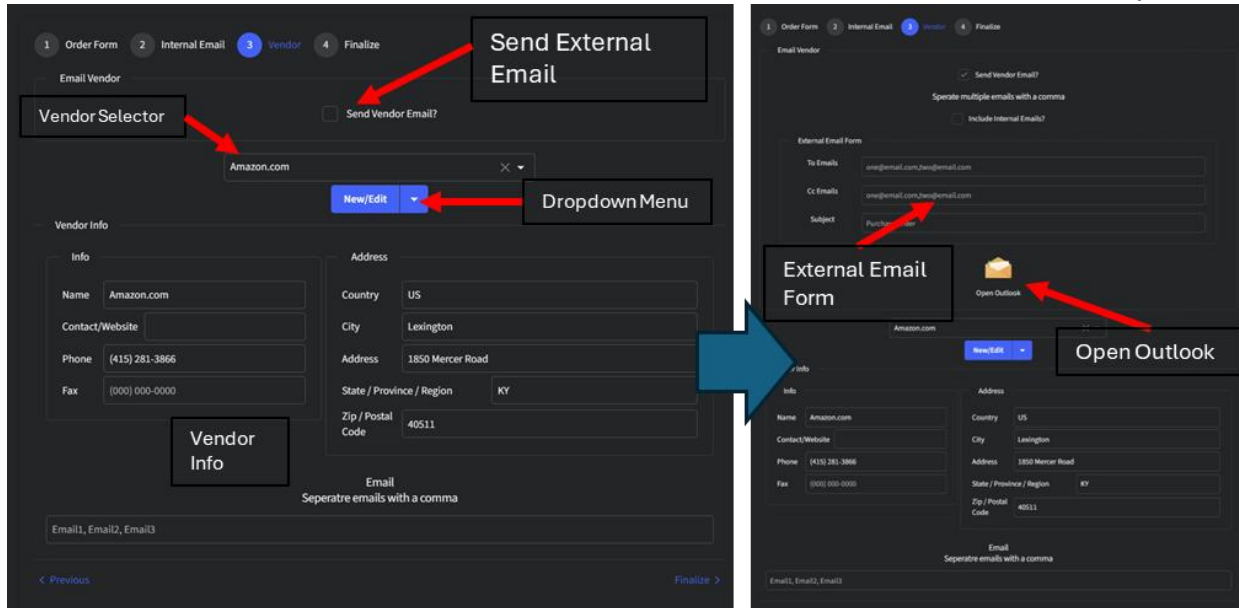


Figure 28: Vendor form

14. To proceed to the next step, select “Step 4 (Finalize)” at the top of the form or click the “Finalize” link at the bottom of the form (see Figure 29).
15. Fix any errors in the “User Action Alerts” list.
16. On the right-hand side enter any comments for the email or purchase order
  - a. Email Comments will be appended to the “Comments” section of the email
  - b. Po Comments will be appended to the purchase order “Comments of Special Instructions” section
17. Review the email under the “Email Preview” tab and review the purchase order under the “Po Preview” tab
18. Press the “Submit” button to finish the order

|                  |                                   |                                   |
|------------------|-----------------------------------|-----------------------------------|
| <b>SET, Inc.</b> | <b>Name:</b> Purchase Request SOP | <b>Revision Date:</b><br>12/03/24 |
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The image shows two screenshots of a web application interface for finalizing a purchase request. The top screenshot, labeled 'Errors', shows a 'User Action Alerts' section with three red error messages: 'Purchase Request must be submitted', 'Requester must be submitted', and 'Approver must be submitted'. Below these are 'Submit' and 'Cancel' buttons. The 'Request Ordered' section shows fields for 'Purchase Request' (Andrew Workstations), 'Requester' (Andrew Elmendorf), and 'Approver' (PR Approve). The 'Comments' field contains 'Items ordered.'. The right sidebar has tabs for 'Email and Po Comments', 'Po Preview & Quotes', and 'Email preview'. The bottom screenshot shows the same interface but with the 'User Action Alerts' section green, indicating no errors. A large blue arrow points from the top screenshot to the bottom one.

Figure 29: Order finalize step with errors and without

## Received/Check-in

### Introduction

A purchase request/order can be received by a Purchaser when the items have been delivered. While a request is edited, it will be locked to other users. If another user attempts to perform any action on the same request, the other user will be notified that the request is locked by the user editing the request.

### Procedure

1. Open a browser window and navigate to <http://purchasing.seti.com>
2. The option for checking in a purchase request can be found on the request table, the request queue, or the request's detailed view. See [General Action Procedures-Access User Actions](#) to locate the menu
3. The "Check-in Order" form should be opened to "Step 1(Mark Received)". Two unique check-in scenarios will change what to put in the location field.
  - a. Scenario 1: The recipient notices the item has been delivered and reports it to the Purchaser.
    - i. Use the recipient's name as the location
  - b. Scenario 2: The purchaser notices the items have been delivered and puts the item in a common location for the recipient to pick up later
    - i. Use the common location as the location
4. Enter any comments in the "Receive Comments" field

|           |                            |                            |
|-----------|----------------------------|----------------------------|
| SET, Inc. | Name: Purchase Request SOP | Revision Date:<br>12/03/24 |
| No:       |                            | Page 30 of 34              |

5. Enter the location and mark the item as received. Partial check-in is allowed
  - a. Scenario 1: All items received and are at the same location
    - i. Fill out the “Input” form above the items table
      1. Enter the location in the ‘Location Description’ field
      2. Click the “Apply to All?” check box
      3. Click the “Mark All Received” check box
  - b. Scenario 2: All Items received but are at different locations
    - i. For each item received, fill out the “Location Description” and click the “Received Item?” check box
  - c. Scenario 3: Partially received
    - i. For each item received, fill out the “Location Description” and click the “Received Item?” check box

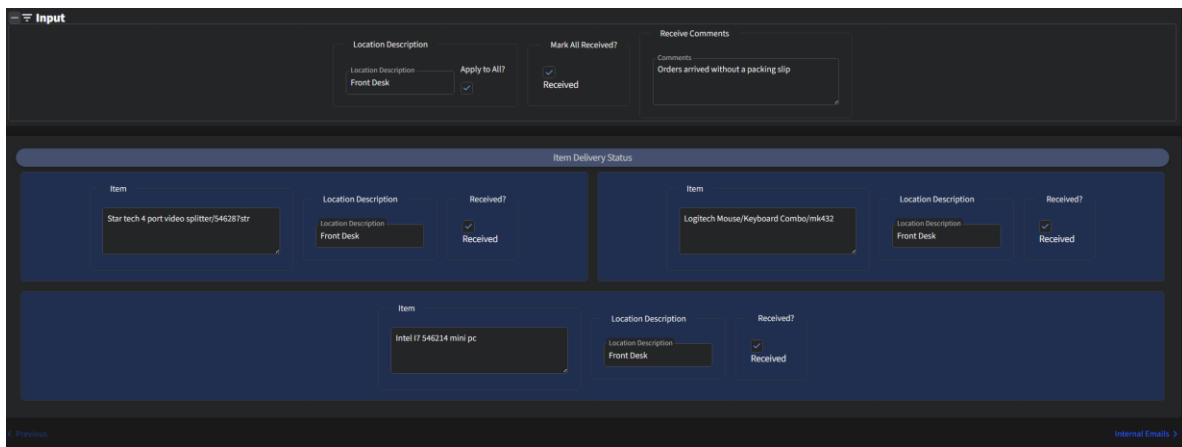


Figure 30: Check-in/Receive Form

6. Select “Step 2 (Internal Emails)” at the top of the form or click the “Internal Emails” link at the bottom of the form to transition to the next step
7. Select any additional users to be notified from the “Additional Emails (CC)” list. See Figure 31.
  - a. The requester, approver, and purchaser will be notified by default. This is specified above the “Additional Emails (CC)” list in the field labeled “Email Recipients.”

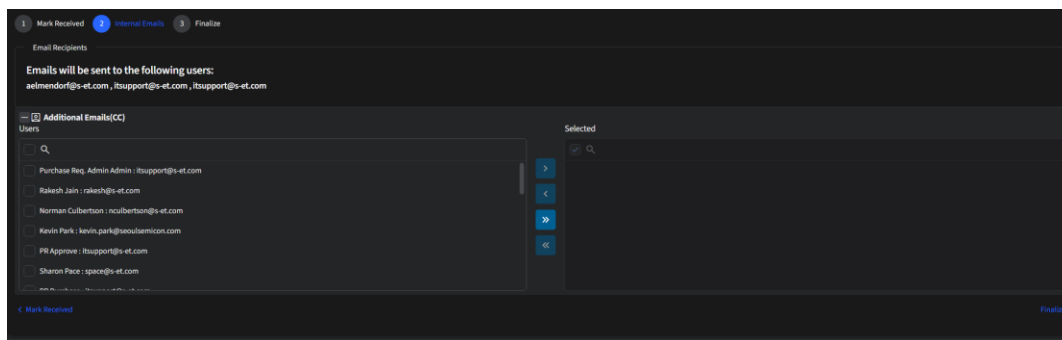
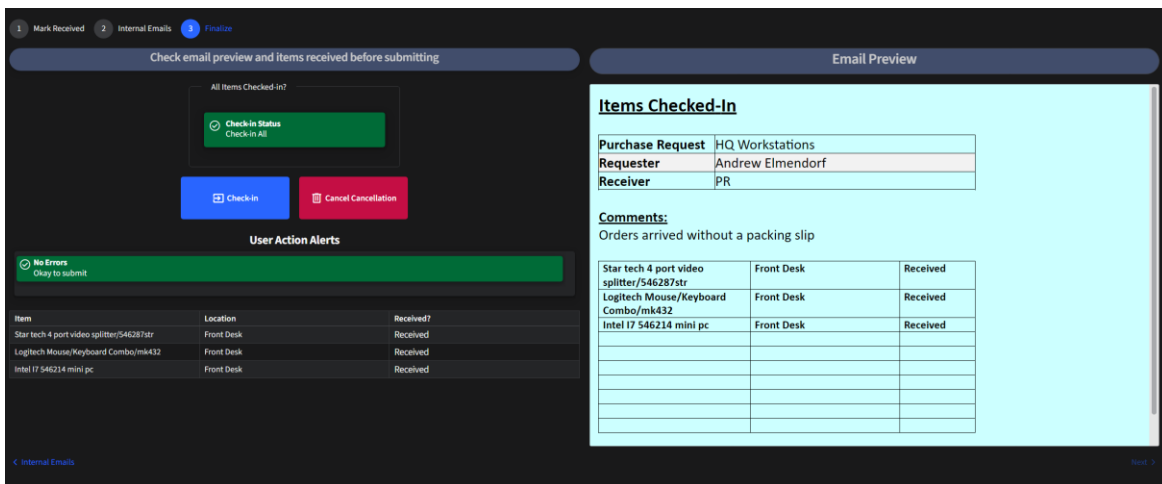


Figure 31: Internal Emails

|                  |                                   |                                   |
|------------------|-----------------------------------|-----------------------------------|
| <b>SET, Inc.</b> | <b>Name:</b> Purchase Request SOP | <b>Revision Date:</b><br>12/03/24 |
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8. To proceed to the next step, select “Step 3 (Finalize)” at the top of the form or click the “Finalize” link at the bottom of the form.
9. Note the “All Items Checked-in?” notification. If the notification displays “Partial Check-in,” and this was intended, go to the next step. If this was not intended, one or more items were not marked as received. Go back to “Step 1 (Marked Received)” and check the form
10. Fix any errors listed in the “User Action Alerts” list
11. Review the received items at the bottom of the form and review the email preview
12. Press the “Submit” button to finish the check-in process. See Figure 32 for all items checked in and Figure 33 for a partial check-in
  - a. If the check-in was partial, the request/order’s status will change to deliver but will be marked as incomplete. To finish the check-in, simply follow this procedure again once the items are received



1 Mark Received 2 Internal Emails 3 **Finalize**

Check email preview and items received before submitting

All Items Checked-in?

Check-in Status  
Check-in All

Check-in Cancel Cancellation

User Action Alerts

No Errors  
Okay to submit

| Item                                      | Location   | Received? |
|---|------------|-----------|
| Star tech 4 port video splitter/546287str | Front Desk | Received  |
| Logitech Mouse/Keyboard Combo/mk432       | Front Desk | Received  |
| Intel I7 546214 mini pc                   | Front Desk | Received  |

Email Preview

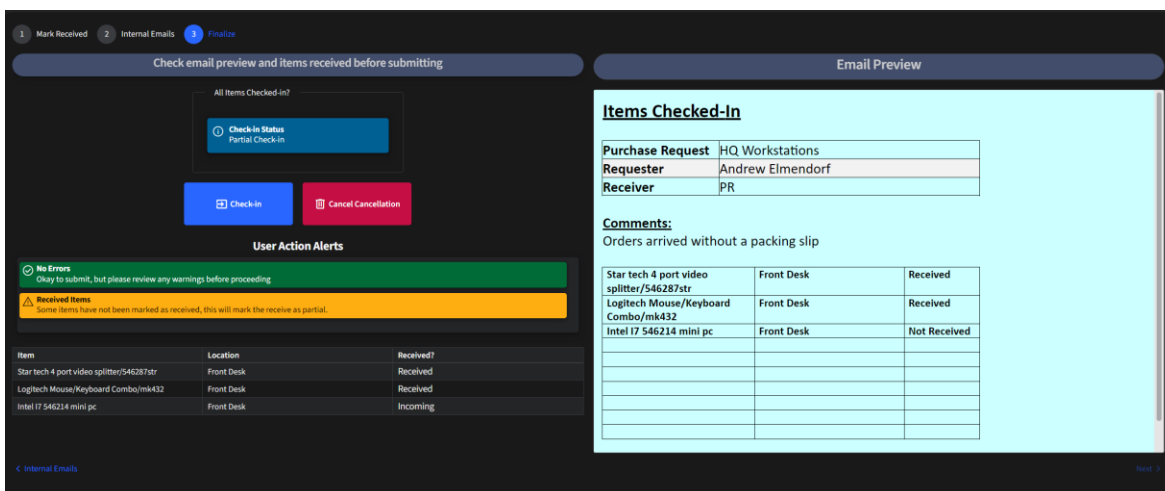
**Items Checked-In**

|                  |                  |
|------------------|------------------|
| Purchase Request | HQ Workstations  |
| Requester        | Andrew Elmendorf |
| Receiver         | PR               |

Comments:  
Orders arrived without a packing slip

| Item                                      | Location   | Received |
|---|------------|----------|
| Star tech 4 port video splitter/546287str | Front Desk | Received |
| Logitech Mouse/Keyboard Combo/mk432       | Front Desk | Received |
| Intel I7 546214 mini pc                   | Front Desk | Received |

Figure 32: Check-in finalize, all items



1 Mark Received 2 Internal Emails 3 **Finalize**

Check email preview and items received before submitting

All Items Checked-in?

Check-in Status  
Partial Check-in

Check-in Cancel Cancellation

User Action Alerts

No Errors  
Okay to submit, but please review any warnings before proceeding

Received Items  
Some items have not been marked as received, this will mark the receive as partial.

| Item                                      | Location   | Received? |
|---|------------|-----------|
| Star tech 4 port video splitter/546287str | Front Desk | Received  |
| Logitech Mouse/Keyboard Combo/mk432       | Front Desk | Received  |
| Intel I7 546214 mini pc                   | Front Desk | Incoming  |

Email Preview

**Items Checked-In**

|                  |                  |
|------------------|------------------|
| Purchase Request | HQ Workstations  |
| Requester        | Andrew Elmendorf |
| Receiver         | PR               |

Comments:  
Orders arrived without a packing slip

| Item                                      | Location   | Received     |
|---|------------|--------------|
| Star tech 4 port video splitter/546287str | Front Desk | Received     |
| Logitech Mouse/Keyboard Combo/mk432       | Front Desk | Received     |
| Intel I7 546214 mini pc                   | Front Desk | Not Received |

Figure 33: Check-in finalize, partial





## *Cancel*

### Introduction

A purchase request/order can be canceled by a Purchaser when the items have been ordered. While a request is edited, it will be locked to other users. If another user attempts to perform any action on the same request, the other user will be notified that the request is locked by the user editing the request.

### Procedure

1. The procedure for canceling a request once ordered is the same as when a Requester cancels a request. The only difference is the request will **not** be deleted but marked as rejected. Follow the instructions for a Requester canceling a request here: [Cancel Purchase Request](#)

## H. QUALITY CONTROL

N/A

## I. CORRECTIVE ACTION

N/A

|           |                            |                            |
|-----------|----------------------------|----------------------------|
| SET, Inc. | Name: Purchase Request SOP | Revision Date:<br>12/03/24 |
| No:       | Page 33 of 34              |                            |



## J. REVISIONS

This process must be reviewed and approved by the authorized manager:

| Revision No: | Revision Date | Nature of Change | Reviewed and Approved By: |
|--------------|---------------|------------------|---------------------------|
| 1            | 11/23/24      | Original Issue   |                           |
|              |               |                  |                           |
|              |               |                  |                           |
|              |               |                  |                           |
|              |               |                  |                           |
|              |               |                  |                           |
|              |               |                  |                           |
|              |               |                  |                           |
|              |               |                  |                           |