# 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*

## *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

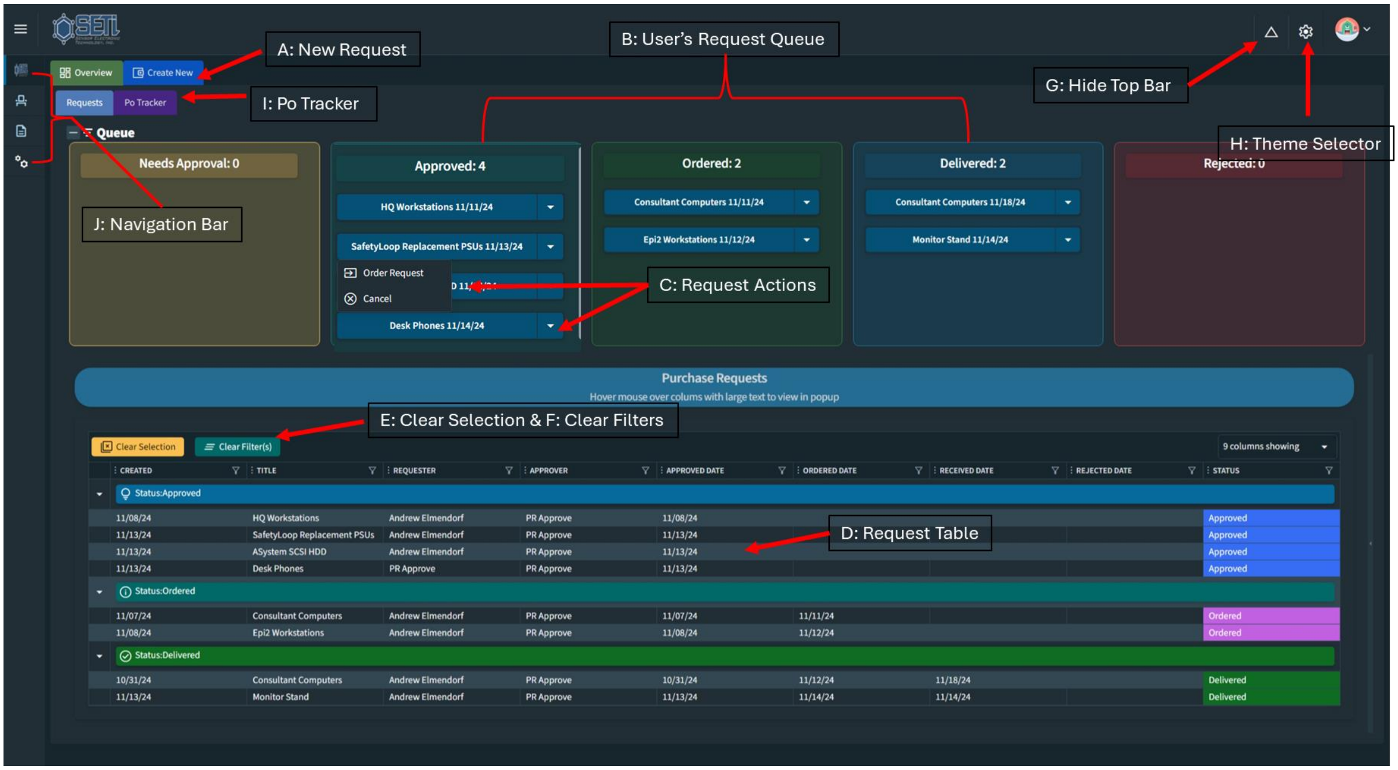



*Figure 1: Shows the main user dashboard with a key area labeled*

## *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 7days after they are received

*C: Request Actions:*

- The requests in the request queue serve as a drop-down menu with actions related to the request state and the user's role. See Purchase Request/Order Action by Role and Request State for action details.

*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

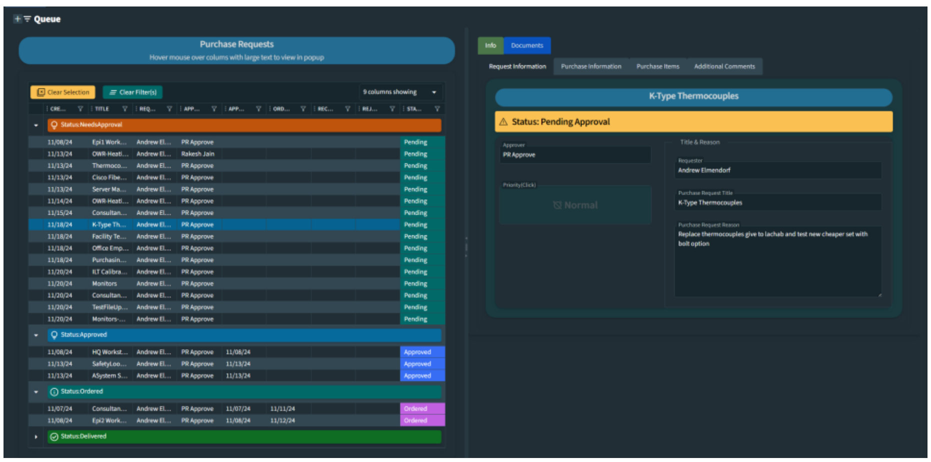



*Figure 2: Selected request details inside pane*

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

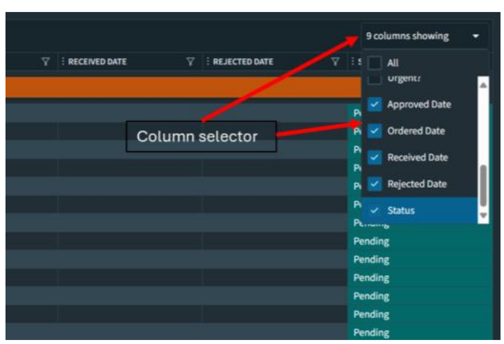



*Figure 3: Column selector and drop-down menu*

*E: Clear Select*

- Clears the selected request and resets the dashboard UI layout

*F: Clear Filters*

- Clears all column filters

### *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

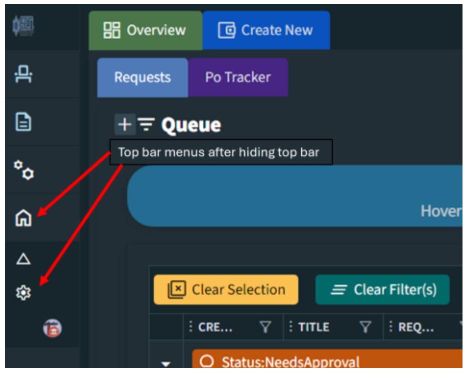


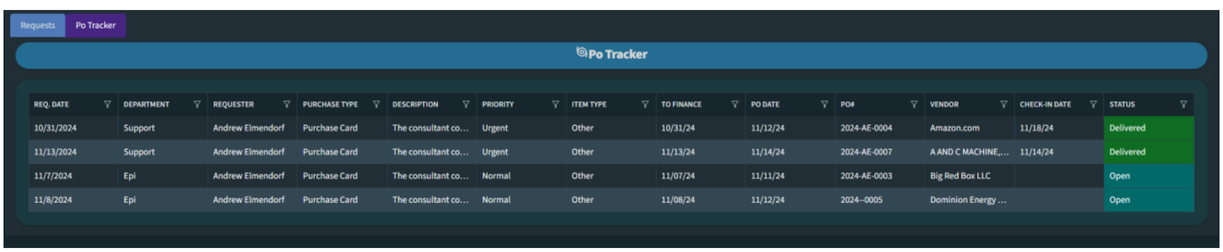

*Figure 4: Top bar menu location after hiding the top bar*

### *H: Theme Selector*

- Opens a side bar 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



Requests | Po Tracker

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. To expand the navigation menu, click the three stack lines on the top right most corner. When the navigation menu collapses to only icons, hover the mouse over an icon to view the tooltip.

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

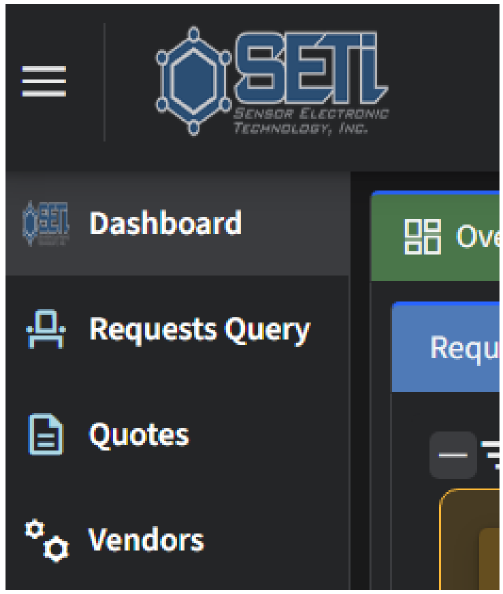



*Figure 6: Navigation menu with menu expanded to icons and text*

## 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.

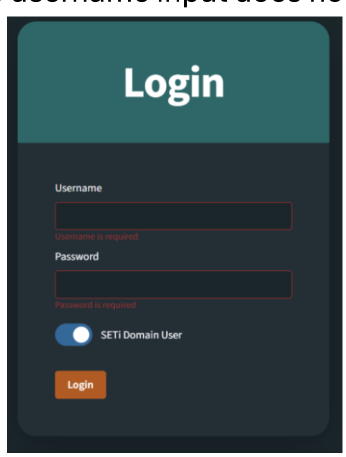



*Figure 7: Login form*

3. After you press enter or the login button you will be prompted to check your user information. Select a profile icon and verify the information, make any necessary changes. Once completed press the "Register" button

## General Website Procedures

### Access User Actions

1. Open the browser and go to http://purchasing.seti.com
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 8 an example purchases 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

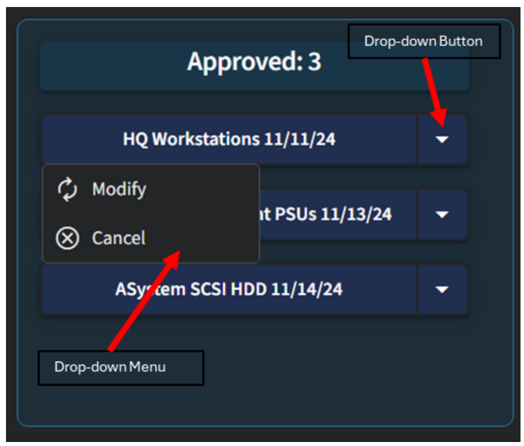



*Figure 8: Approved state on the request queue. Demonstrating the pop-up menu of the "HQ Workstations 11/11/23" request*

   - Location 2: On the purchase request table, right-click the row of the desired purchase request. 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

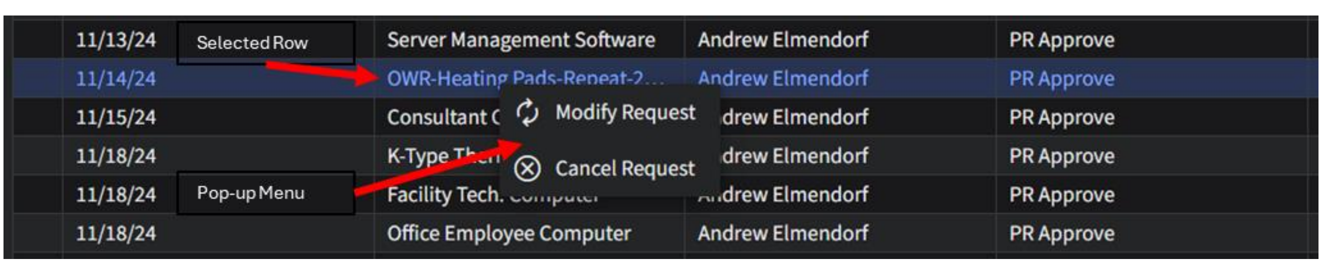



*Figure 9: Purchase request table right-click context menu*

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

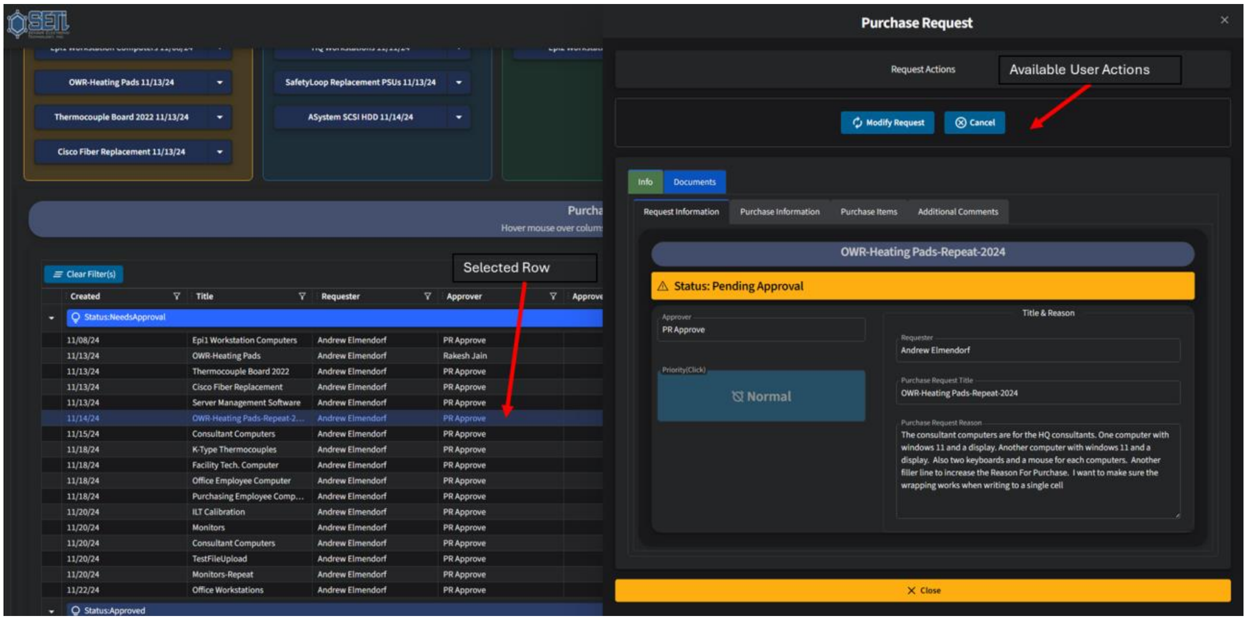



*Figure 10: Purchase request details with available actions*

- 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 the desired column
   - 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 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. Follow the Requester Action Procedures-Create Purchase Request for creating a vendor while creating a purchase request.

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 11.
   - To filter click the filter button 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

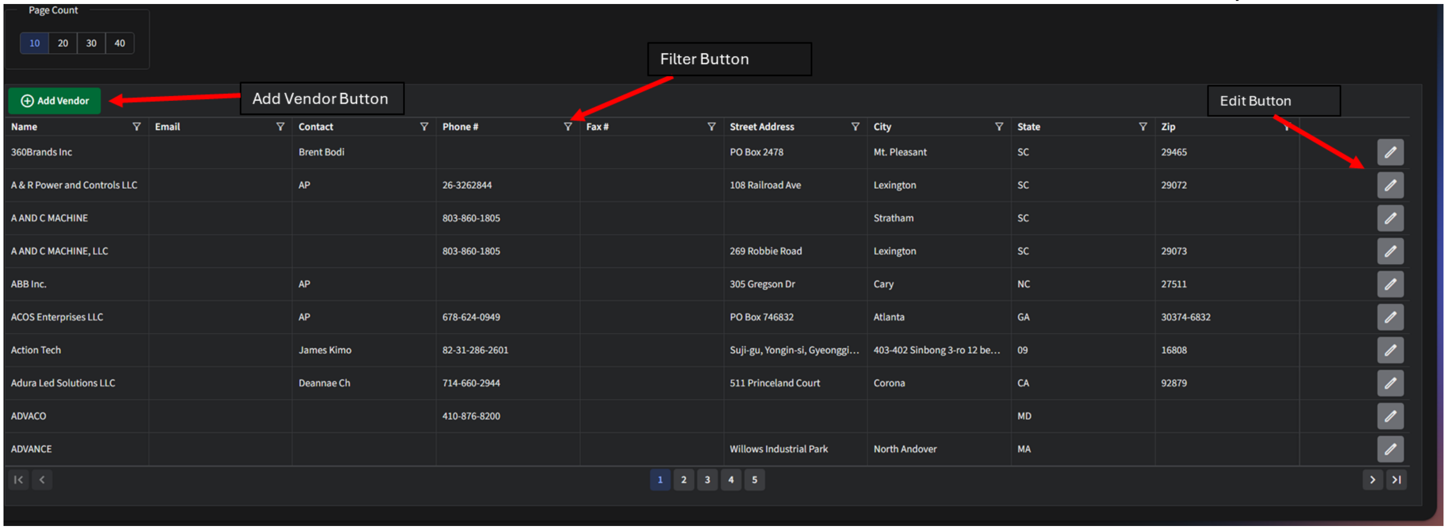



*Figure 11: Vendor table with various buttons pointed to*

## 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 12.
    - It is recommended to use the default "Standard Dark" theme or the "Dark" theme. The app was designed around these two themes


*Figure 12: Theme selector*

### Hide the Top Bar

Hiding the top bar can be useful if there is to 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 13.

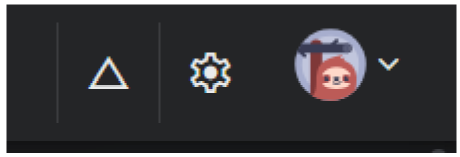


*Figure 13: Top bar menu*

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 14.
5. Click the upward pointing triangle to un-hide the top bar.

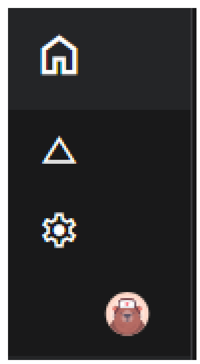


*Figure 14: Top bar menu on the navigation menu*

## 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, before starting a purchase request prepare the following.

- 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
  - 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 15 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

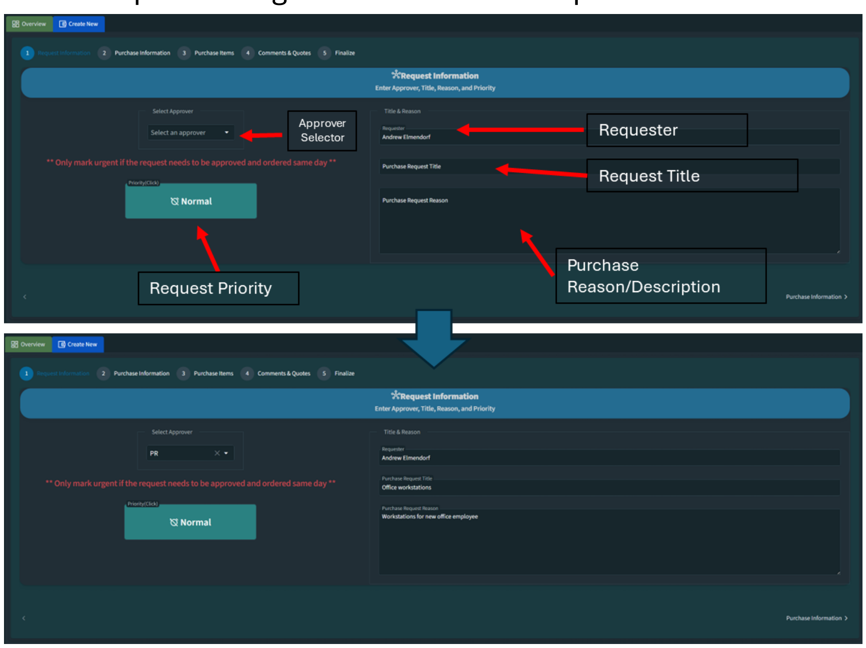



*Figure 15: Step 1 of the purchase request form. Shows and empty form with labels and a correctly filled out form*

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 16 for example of 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 info is a vendor name, but for the benefit of all users, please fill out as much information as possible.
        II. If the vendor is missing information pick the “Edit” option from the drop-down button. A pop-up form will appear, fill out the missing information then press the “Save” button

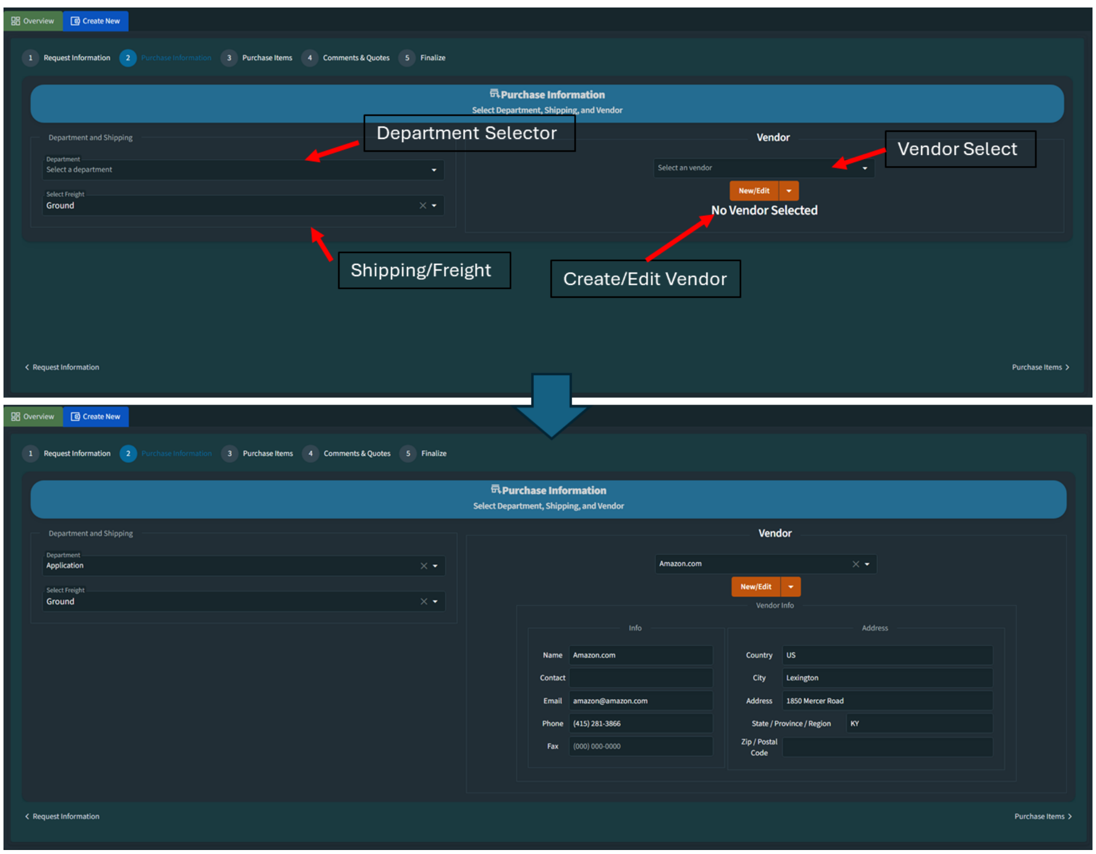



*Figure 16: Step 2 (Purchase Info), show the empty form followed by the form filled out*

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.
9. Enter the requested information. See Figure 17 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

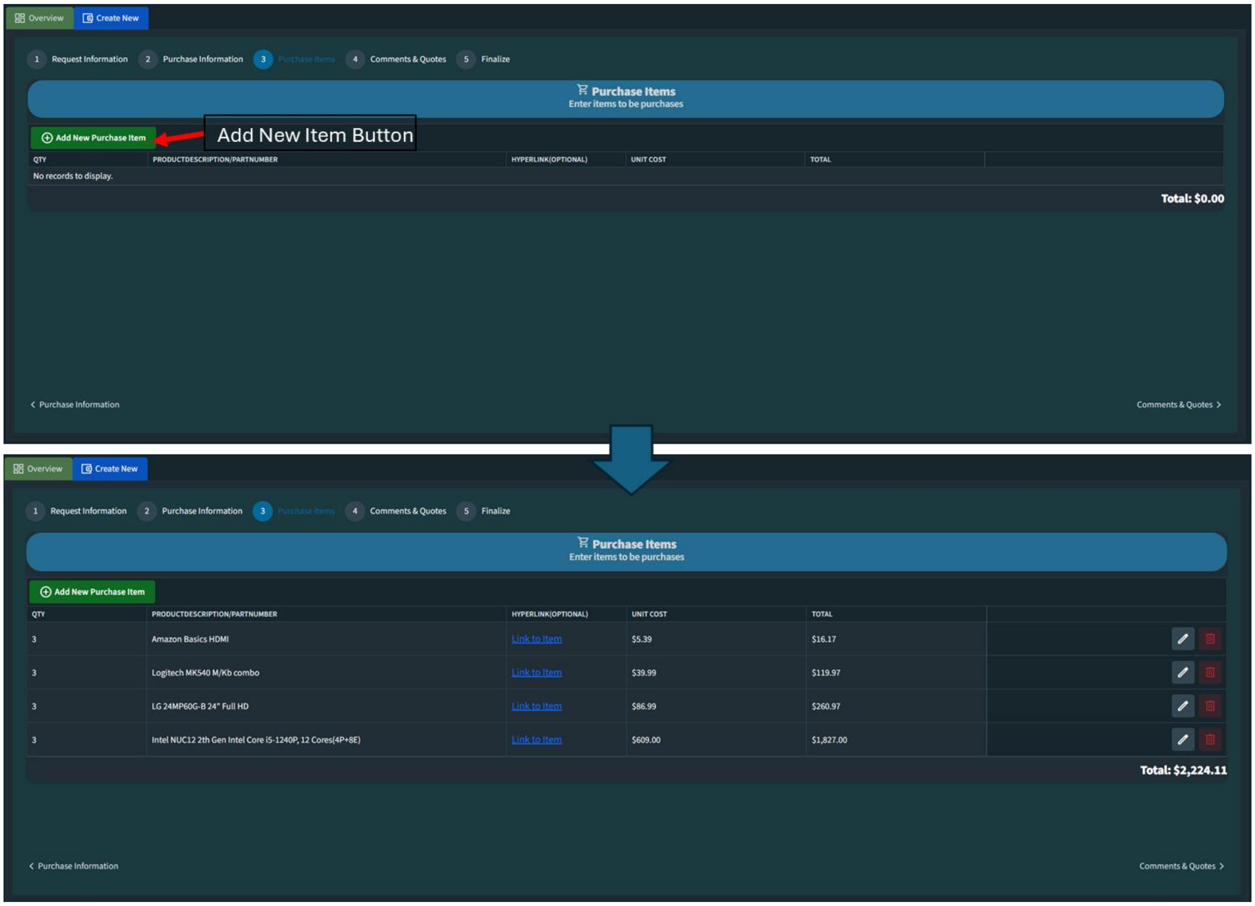



*Figure 17: Step 4 (Purchase Items), show the empty form followed by the form filled out*

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 example of 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

- Accepted file types: .pdf, .doc, .docx, .xls, .xlsx, .jpg, .jpeg, .png

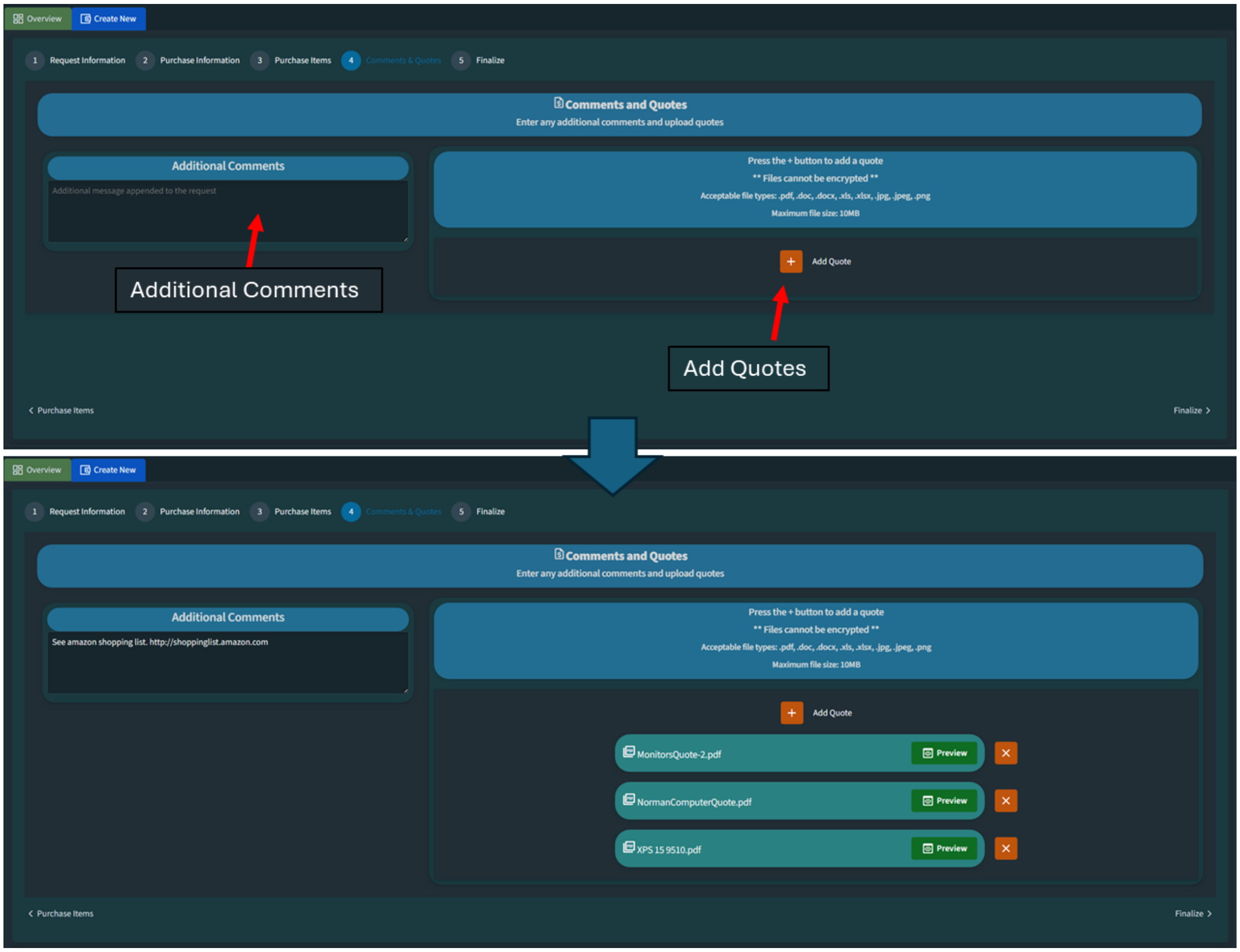



*Figure 18: Step 4(Comments & Quotes), show the empty form followed by the form filled out*

12. To proceed to the next step, select "Step 6 (Finalize)" at the top of the form or click the "Finalize" link at the bottom.
13. Fix any errors in the "User Action Alerts" list.
14. Review the email under the "Email Preview" tab and the purchase request pdf under the "Purchase Request Pdf" tab. See Figure 19 and 20.
15. Once you are satisfied that all the information is correct and there are no errors, press the" Submit" button. See Figure 21 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

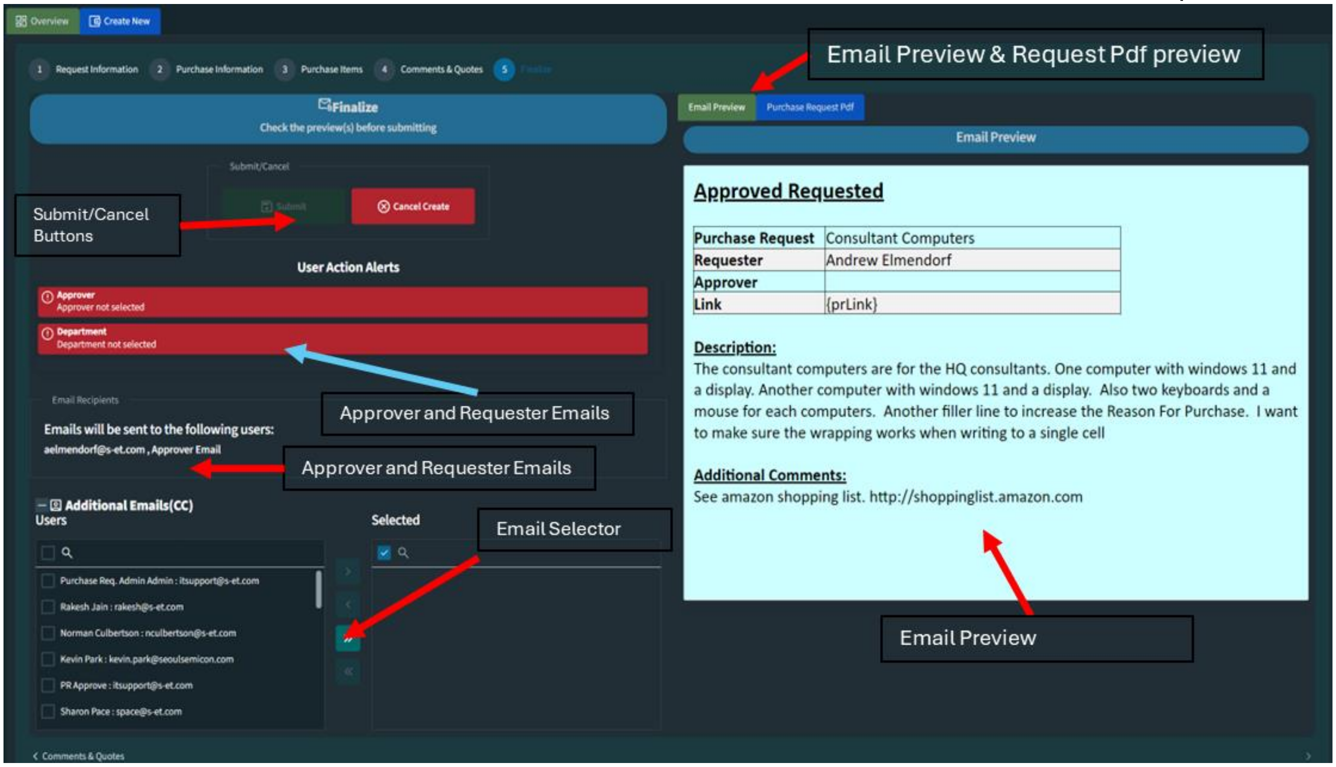



*Figure 19: Step 5 (Finalize) shows the final step with labels. This is also an example of a form with errors in the previous steps*

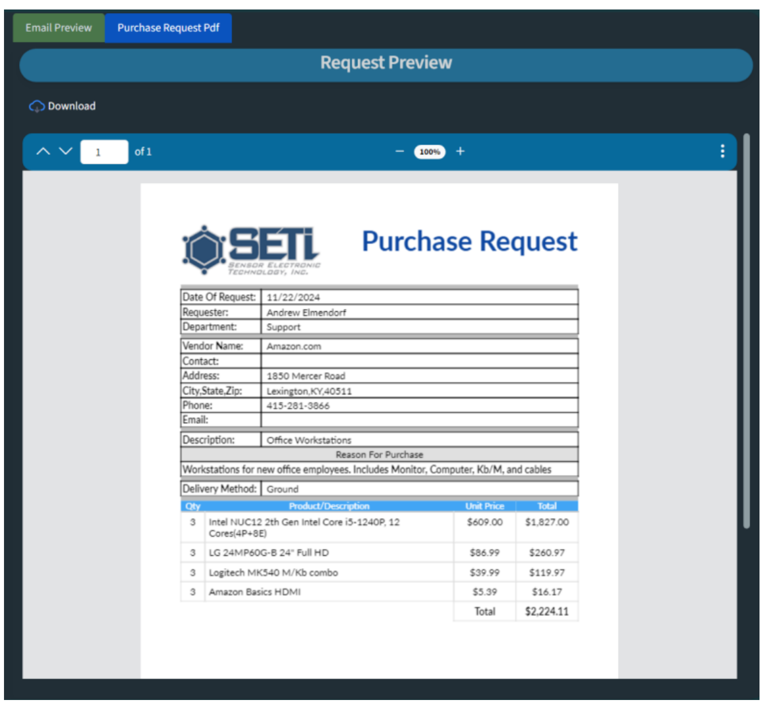



*Figure 20: Purchase Request Pdf*

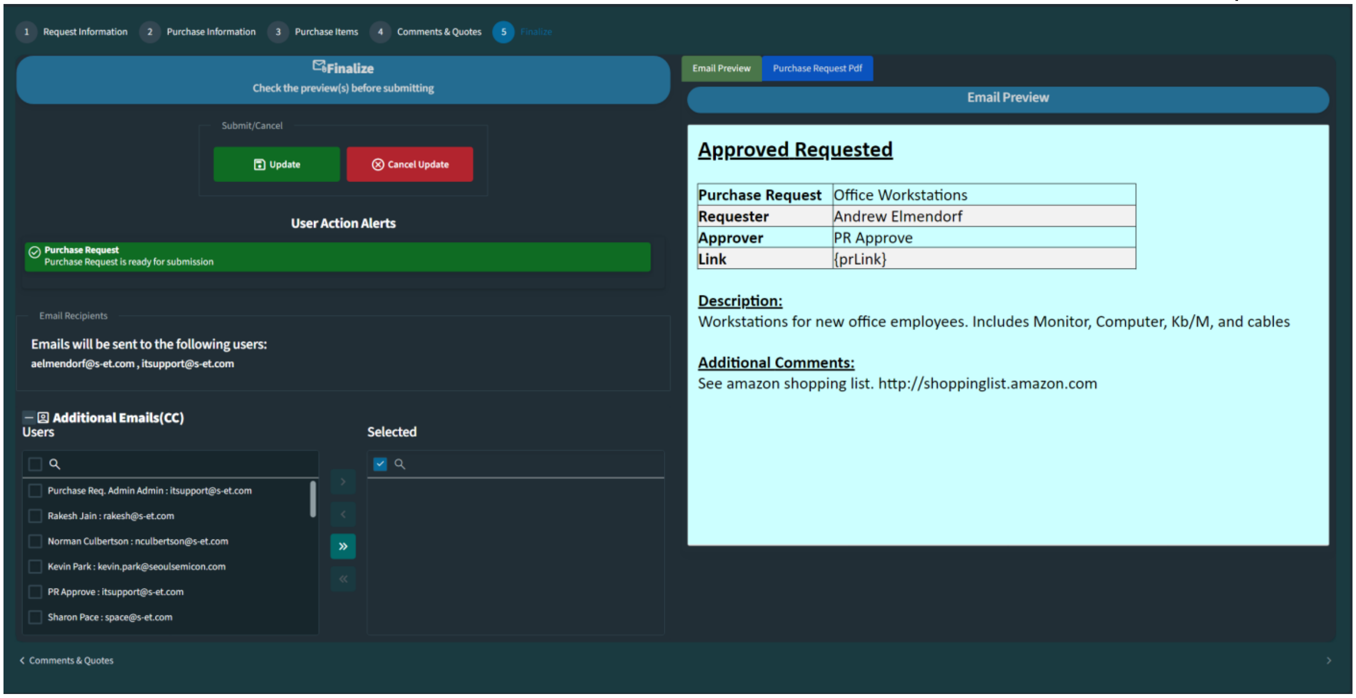



*Figure 21: Step 5 (Finalize), shows a properly filled out form ready for submission*

## *Modify Purchase Request*

### Introduction

The user who created a purchase request can modify the request until it has been ordered. Approvers and Purchasers can modify various parts of the request during the approval and ordering processes. 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](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 the request. 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 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 22.
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

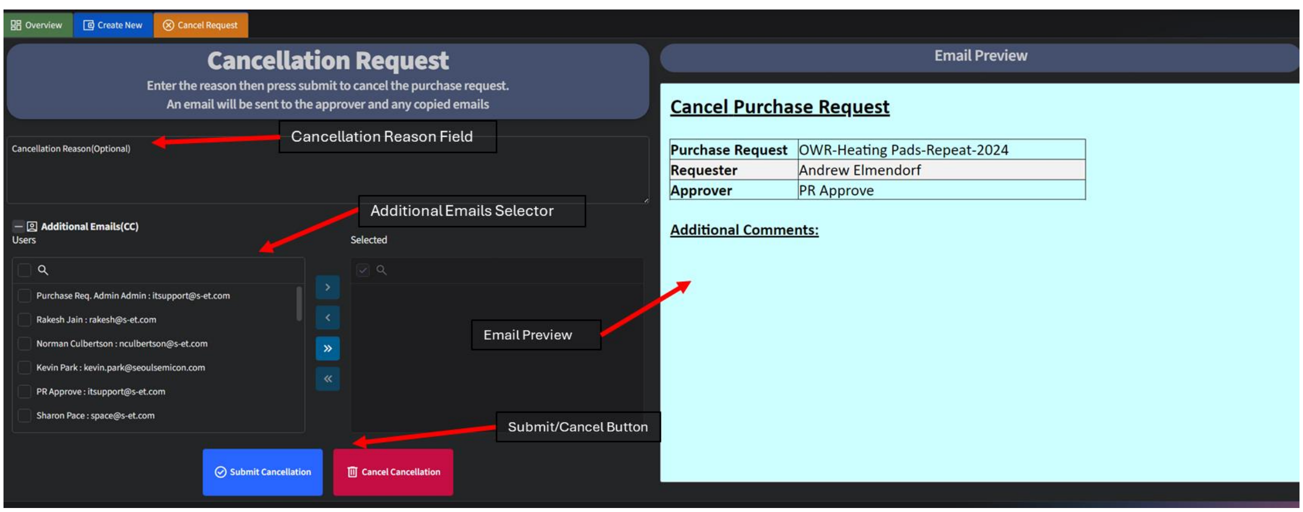



*Figure 22: Cancelation Form*

## *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
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 up until the purchase request has been ordered. To approve/reject a purchase request, the user must have the Approver 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 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
4. Verify the department in the "Select Department" field.
5. Select any additional users to be modified from the "Additional Email (CC)" selector

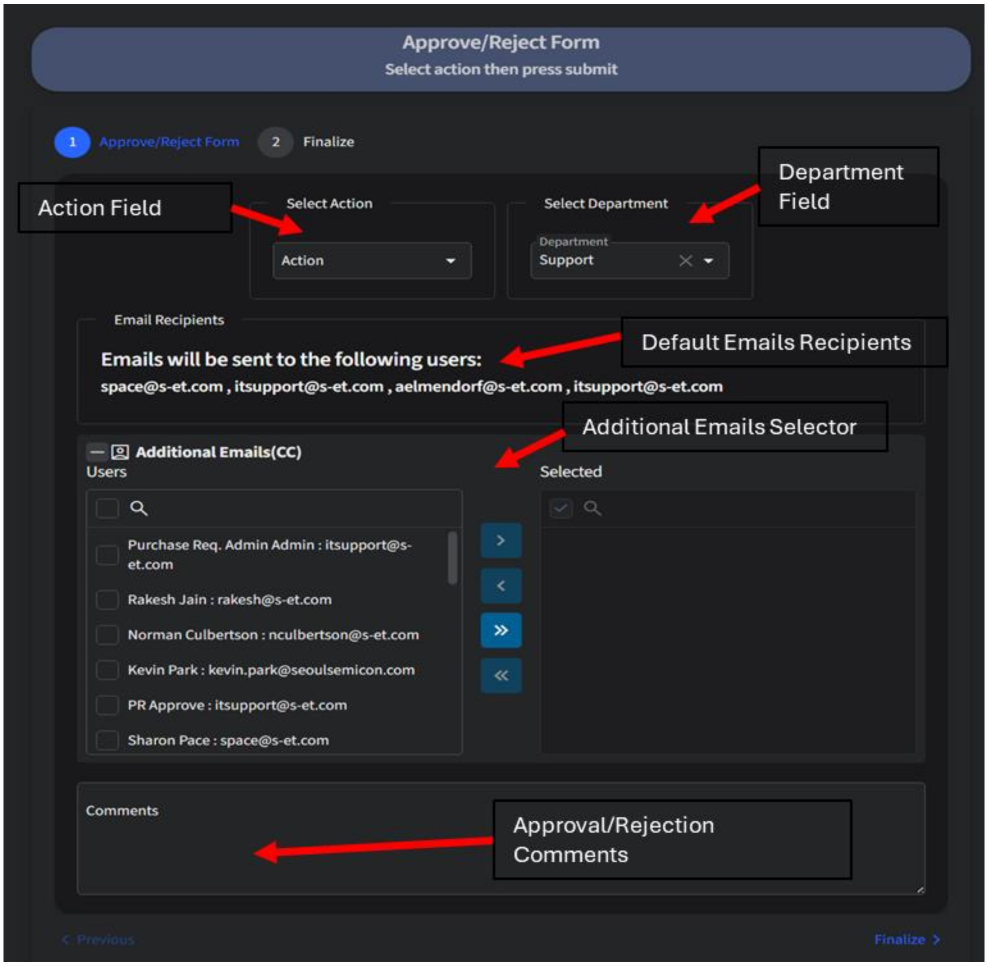



*Figure 23: Approval Reject Form with comments*

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 24.
   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.

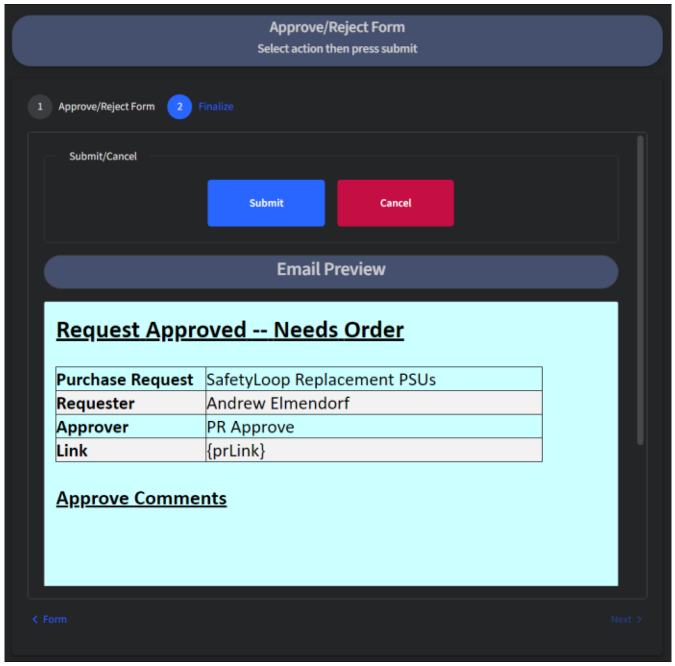



*Figure 24: Approve/Reject form finalize view*

## Purchaser Action Procedures

### *Order*

### Introduction

A purchase request can be ordered once the purchase request has been approved. 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 25.
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.

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

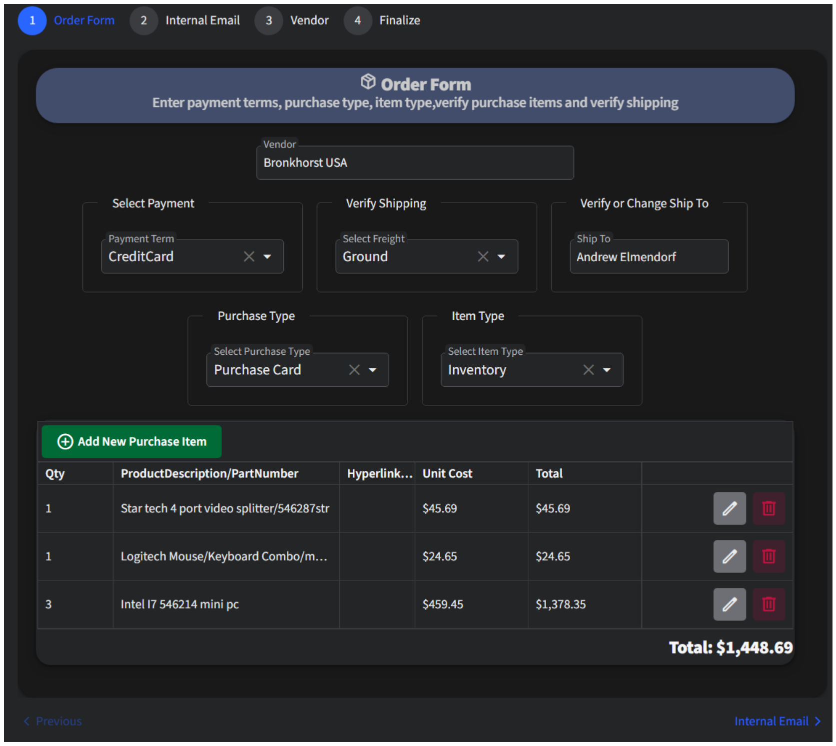



*Figure 25:Order form*

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 transition to the next step, see Figure 26.
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"

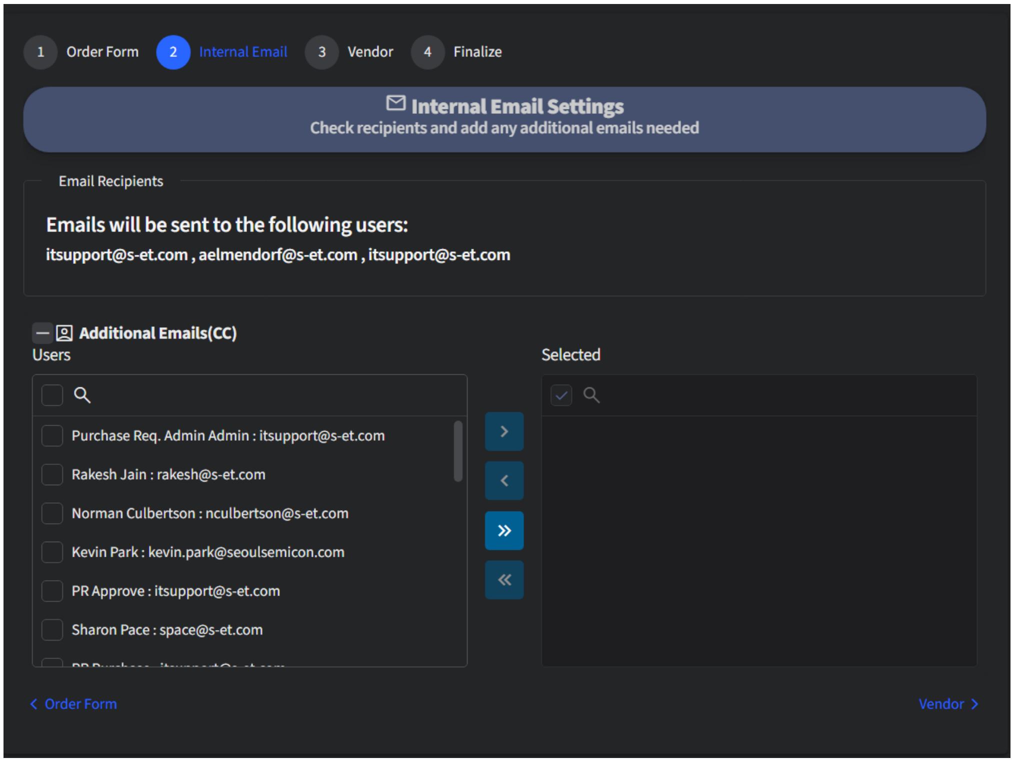



*Figure 26: Internal Email Settings*

11. Select "Step 3" at the top of the form or click the "Vendor" link at the bottom of the from to transition to the next step
12. Verify the vendor's information and modify if needed, See Figure 27.
    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

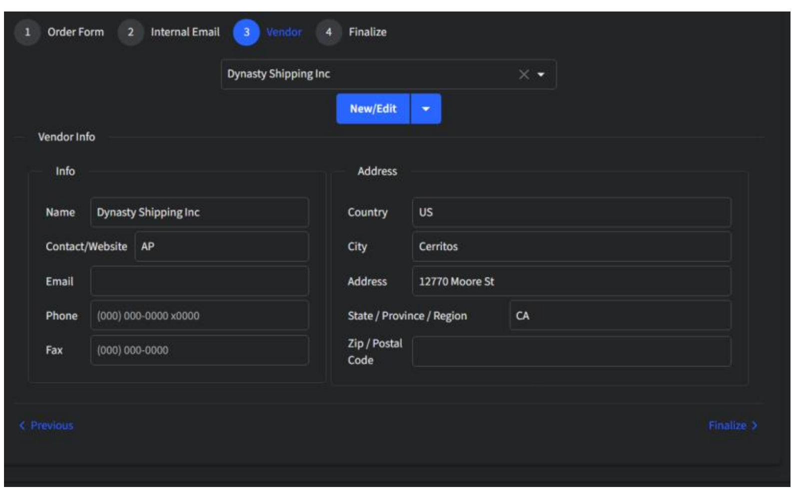



*Figure 27: Vendor form*

13. Select “Step 4 (Finalize)” at the top of the form or click the “Finalize” link at the bottom of the form to transition to the next step, see Figure 28.
14. Fix any errors listed in the “User Action Alerts” list.
15. Add any additional comments needed in the “Comments” entry.
    a. These will be appended to the “Comments” box in the PO document
16. If an external email will be sent, click the check box “Send Vendor Email?”
    a. Click the “Include Internal Emails?” to copy requester, approver, and any additional emails to the external email
    b. Verify/Enter the vendor email
    c. Very/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
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

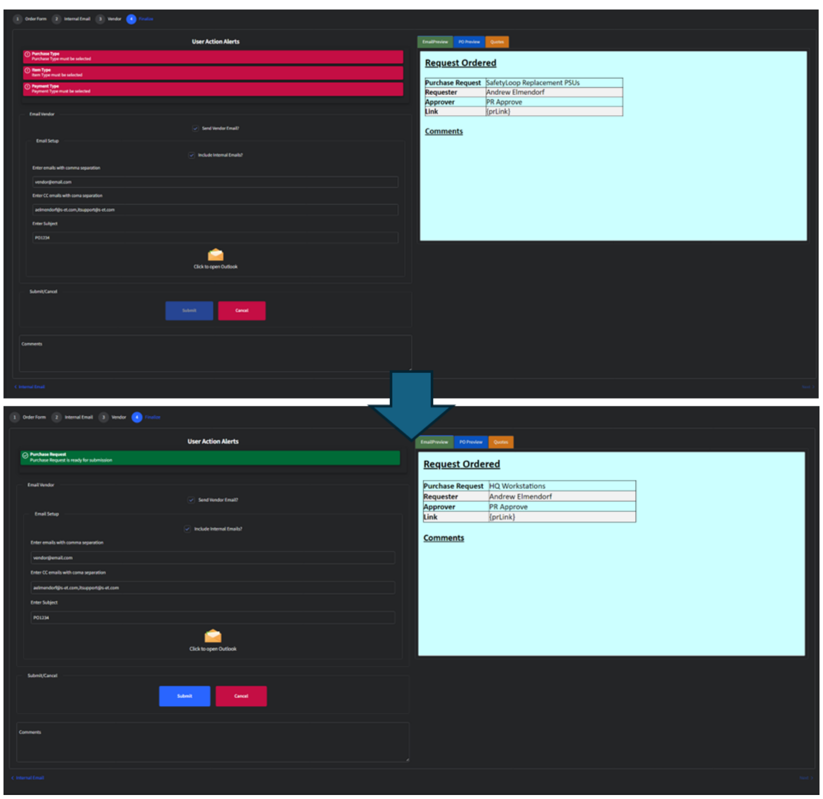



*Figure 28: Order finalize step with errors and without*

### *Received/Check in*

#### Introduction

A purchase request/order can be received by a Purchaser when the items have been delivered. While a request is 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](http://purchasing.seti.com)
2. The option for checking in a purchase request/order can be found
3. The “Check-in Order” form should be opened to “Step 1(Mark Received)”. There are two unique check-in scenarios that will change what to put in the location field, see Figure 29
    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
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

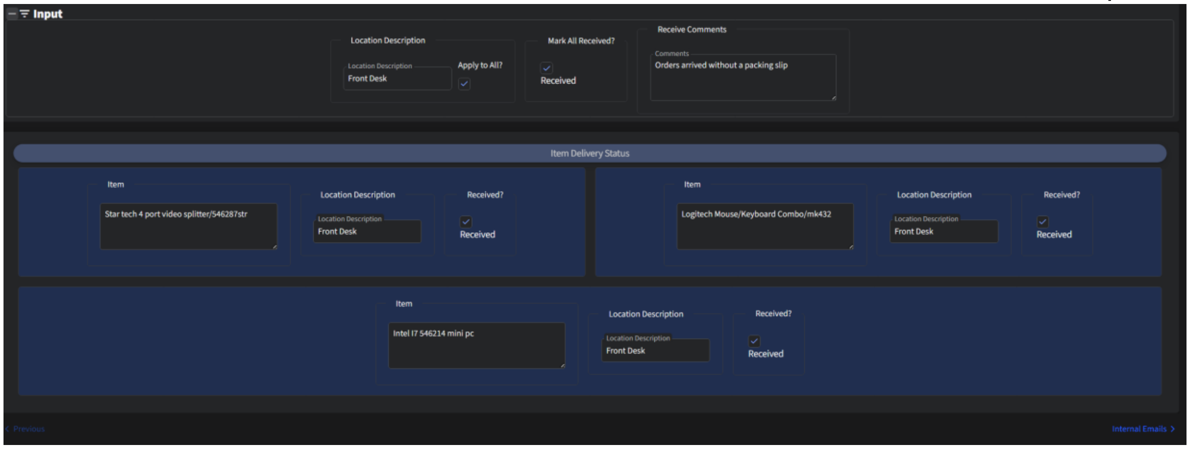



*Figure 29: Check in/Receive Form*

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
   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"

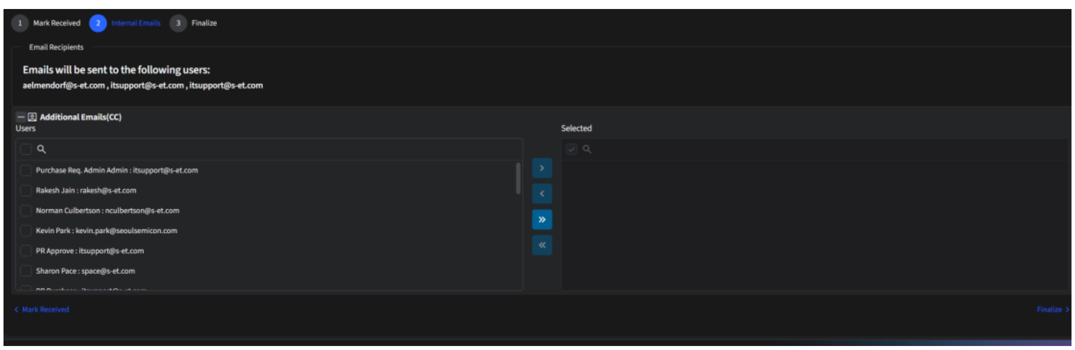



*Figure 30: Internal Emails*

8. Select "Step 3 (Finalize)" at the top of the form or click the "Finalize" link at the bottom of the form to transition to the next step.
9. Note the notification in the "All Items Checked-in?" field. If the notification displays "Partial Check-in" and this was intended, go to the next step. If this was not intended, one or more of the 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 received items at the bottom of the form a review the email preview
12. Press the "Submit" button to finish the check-in process. See Figure 31 for all items checked in and Figure 32 for a partial check in
    a. If the check-in was a partial check-in, the request/order's status will change to delivered but will be marked as incomplete. To finish the check-in simply follow this procedure again once the items are received

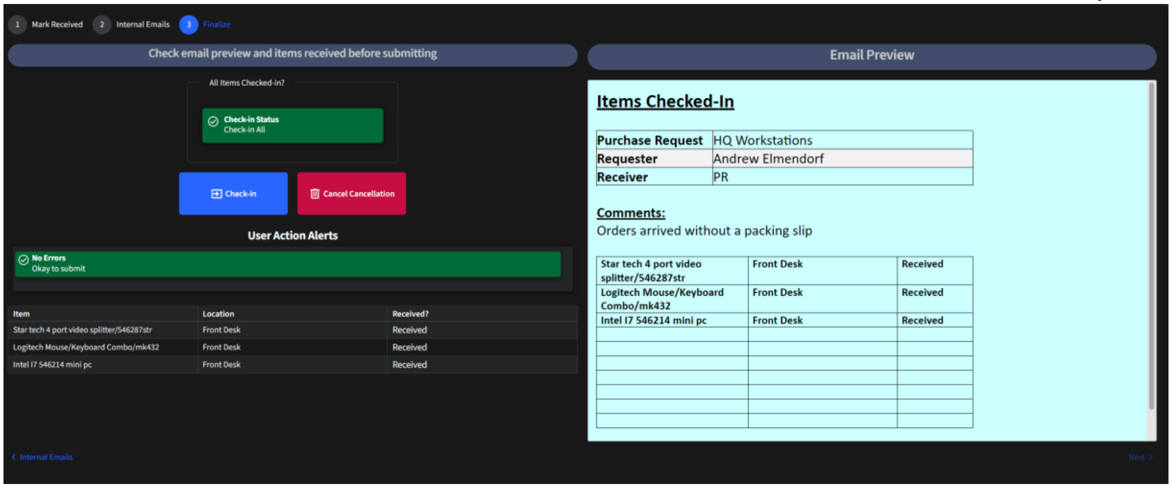



*Figure 31: Check-in finalize, all items*

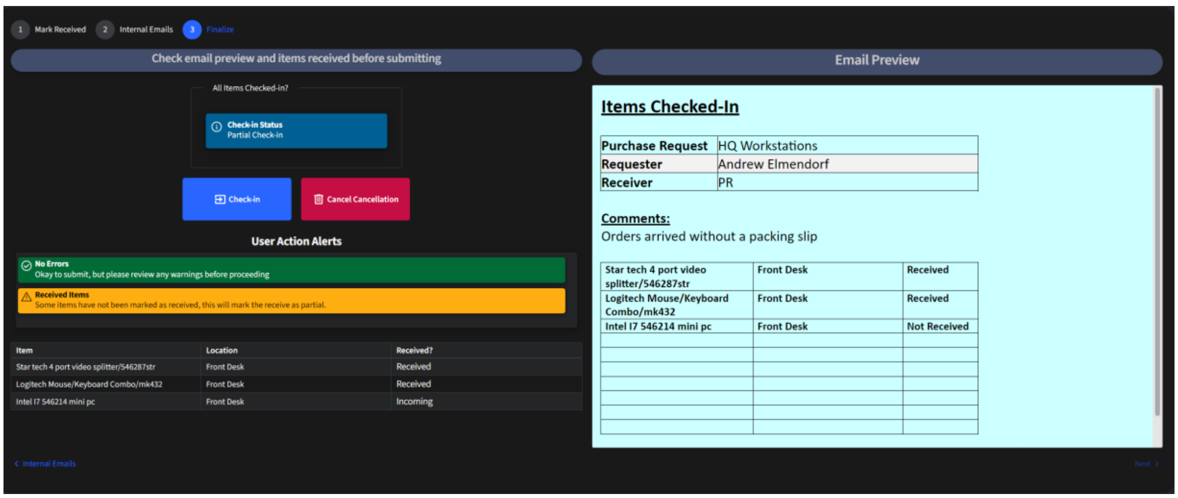



*Figure 32: Check-in finalize, partial*

## H. QUALITY CONTROL

N/A

## I. CORRECTIVE ACTION

N/A

## 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 | |
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