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

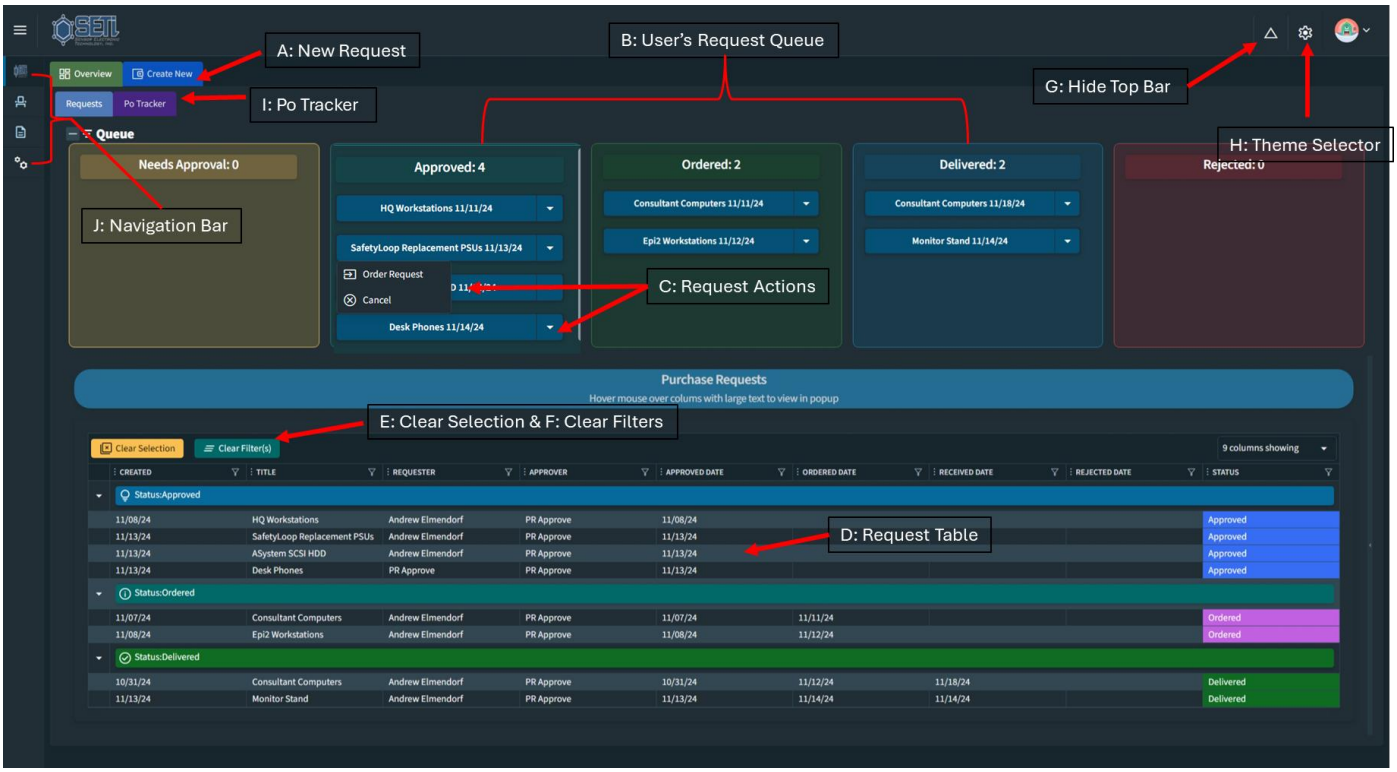

Figure 1: Shows the main user dashboard with a key area labeled

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 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

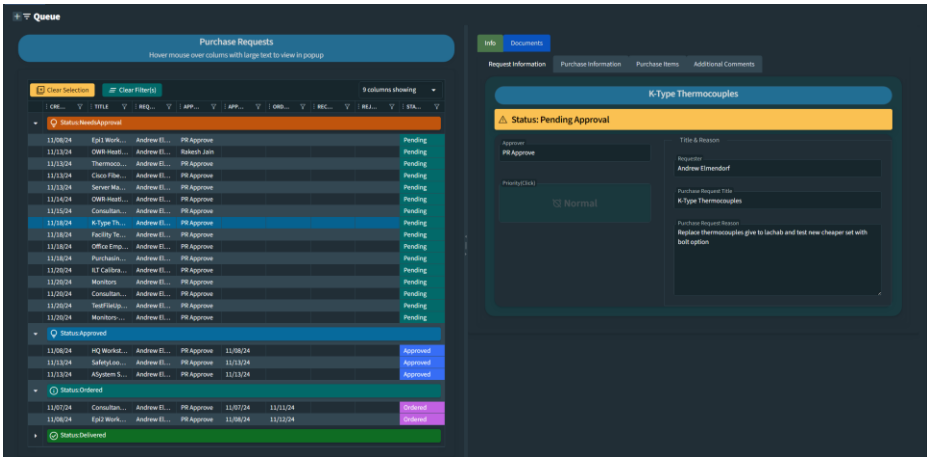

Figure 2: Selected request details inside pane

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

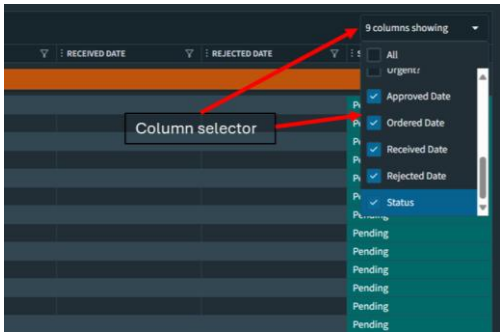

Figure 3: Column selector and drop-down menu

E: Clear Select

- Clears the selected request and resets the dashboard UI layout

F: Clear Filters

- Clears all column filters

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

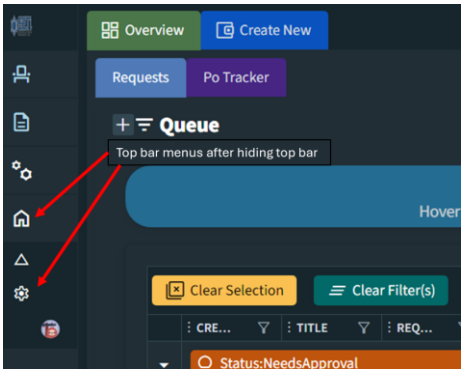

Figure 4: Top bar menu location after hiding the top bar

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

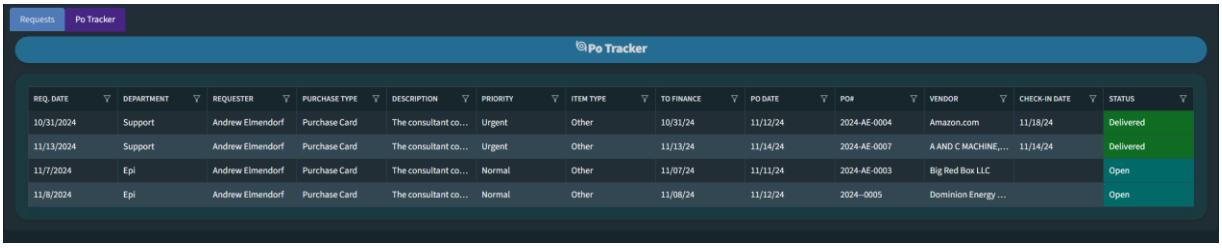

Figure 5: Po Tracker table

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

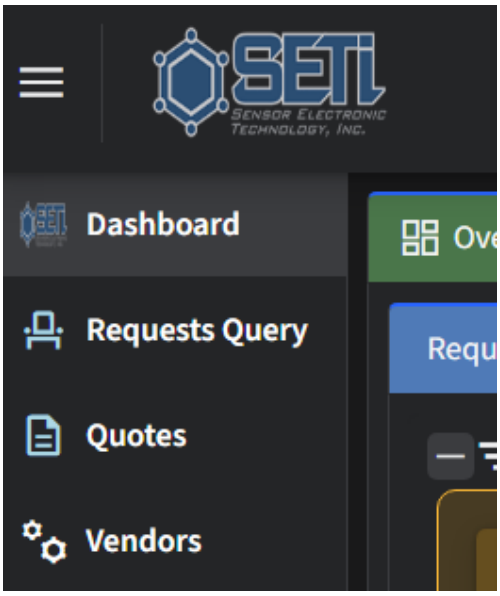

Figure 6: Navigation menu with menu expanded to icons and text

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.

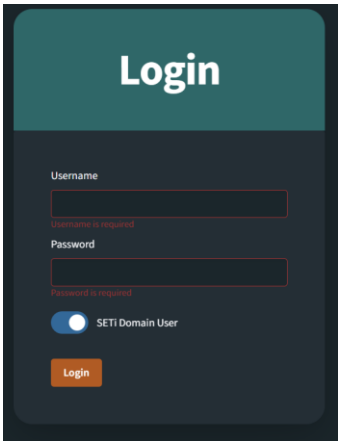

Figure 7: Login form

3. After you press 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

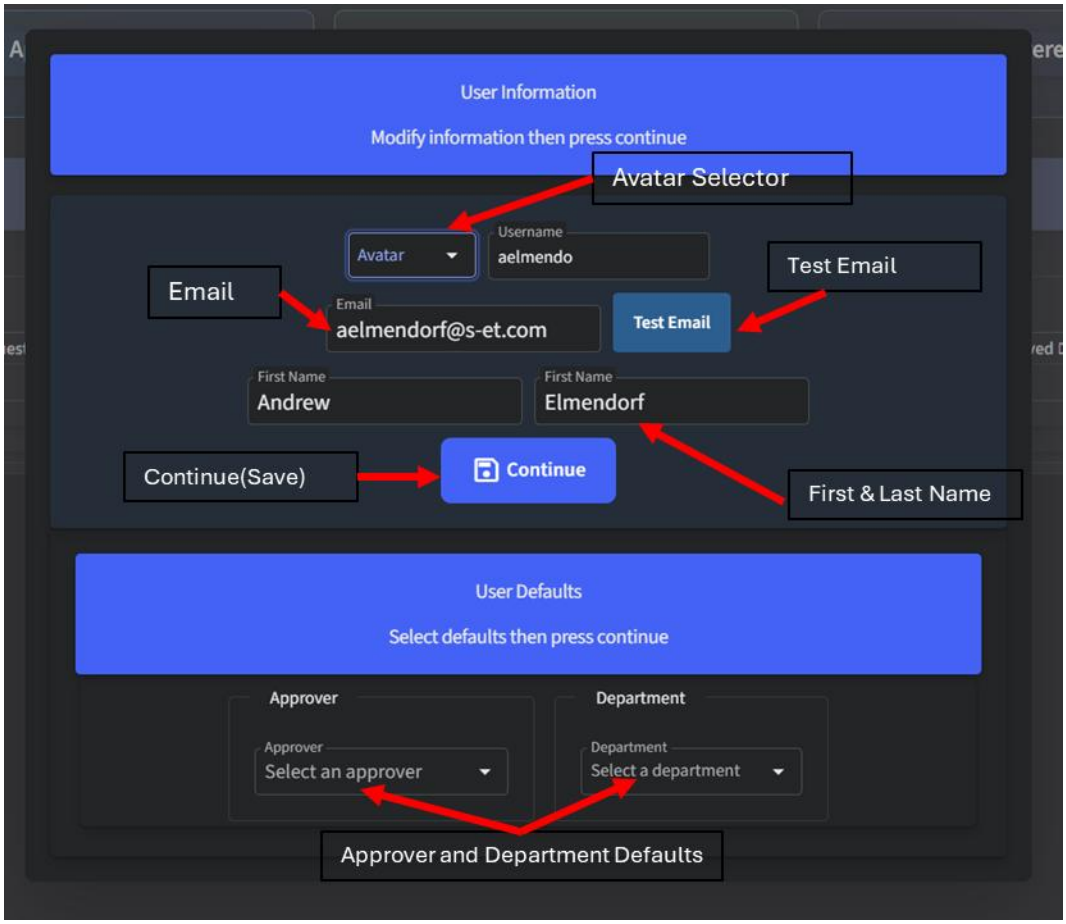

Figure 8: Registration form

4. Press the “Continue” button to save.

General Website Procedures

Access User Actions

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

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

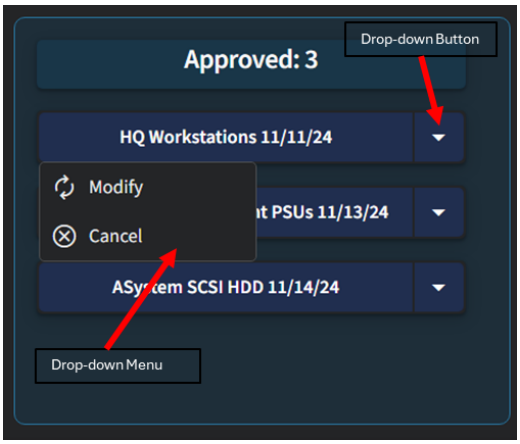

Figure 9: Approved state on the request queue. Demonstrating the pop-up menu of the "HQ Workstations 11/11/23" request

- 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

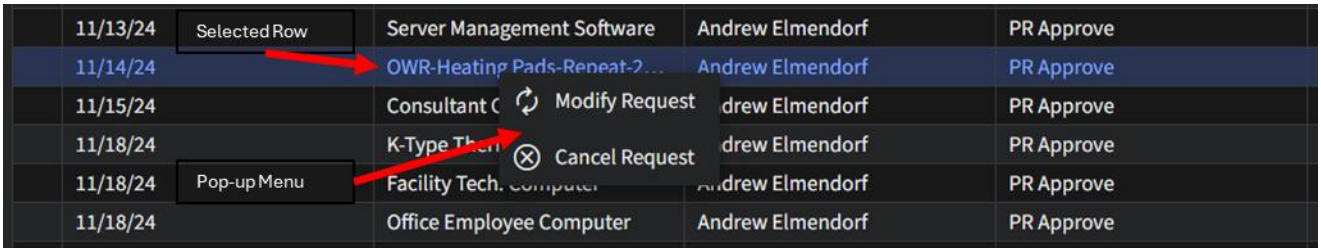

Figure 10: Purchase request table right-click context menu

- 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

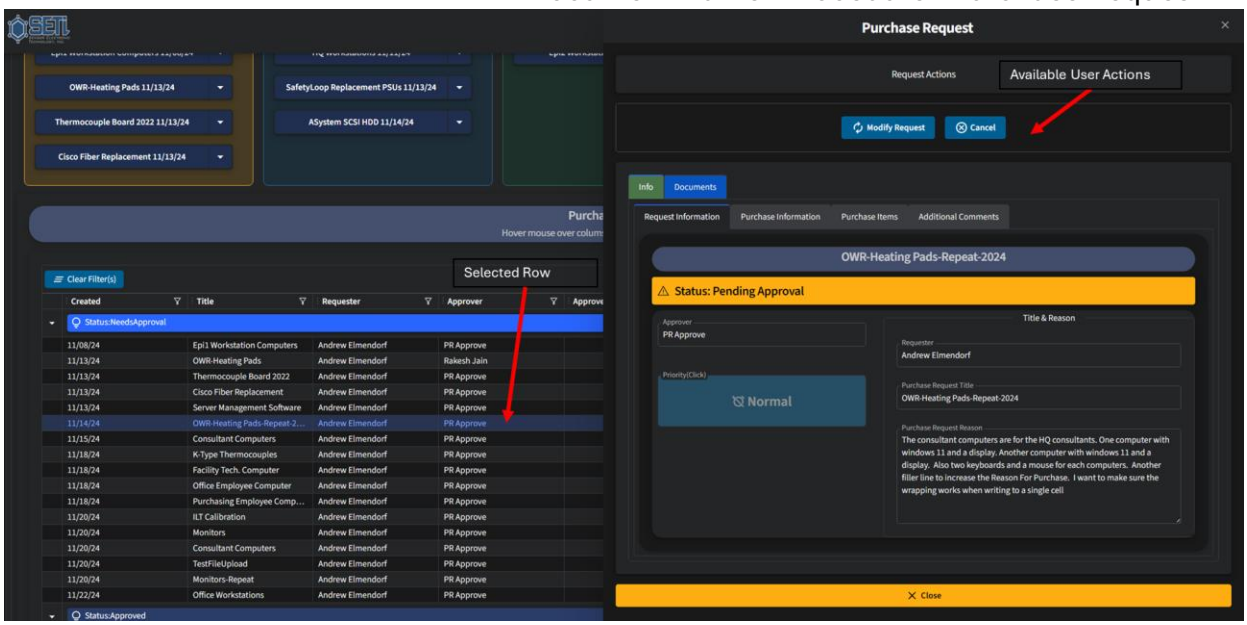

Figure 11: Purchase request details with available actions

- 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

- 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

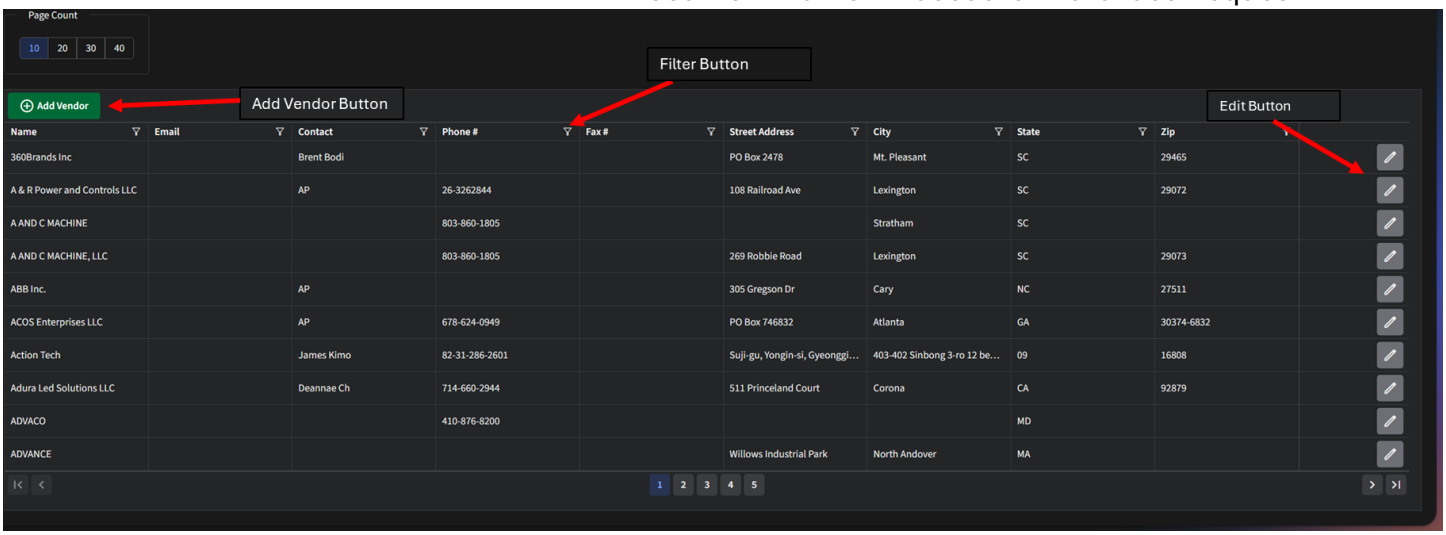

Figure 12: Vendor table with various buttons pointed to

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

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.

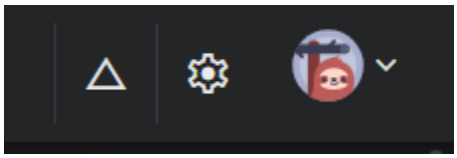

Figure 14: Top bar menu

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.

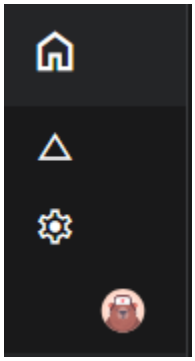

Figure 15: Top bar menu on the navigation menu

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

- 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

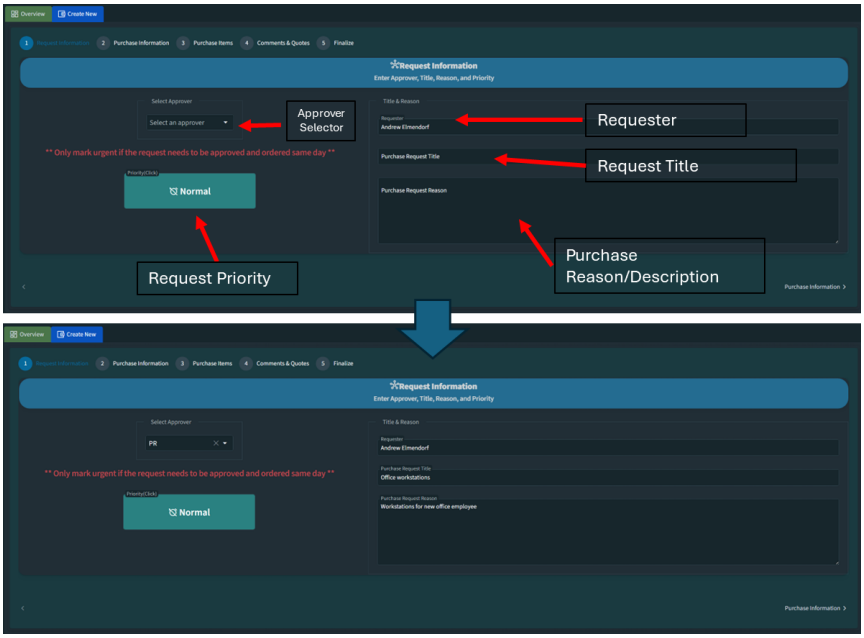

Figure 16: Step 1 of the purchase request form. Shows an empty form with labels and a correctly filled-out form

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

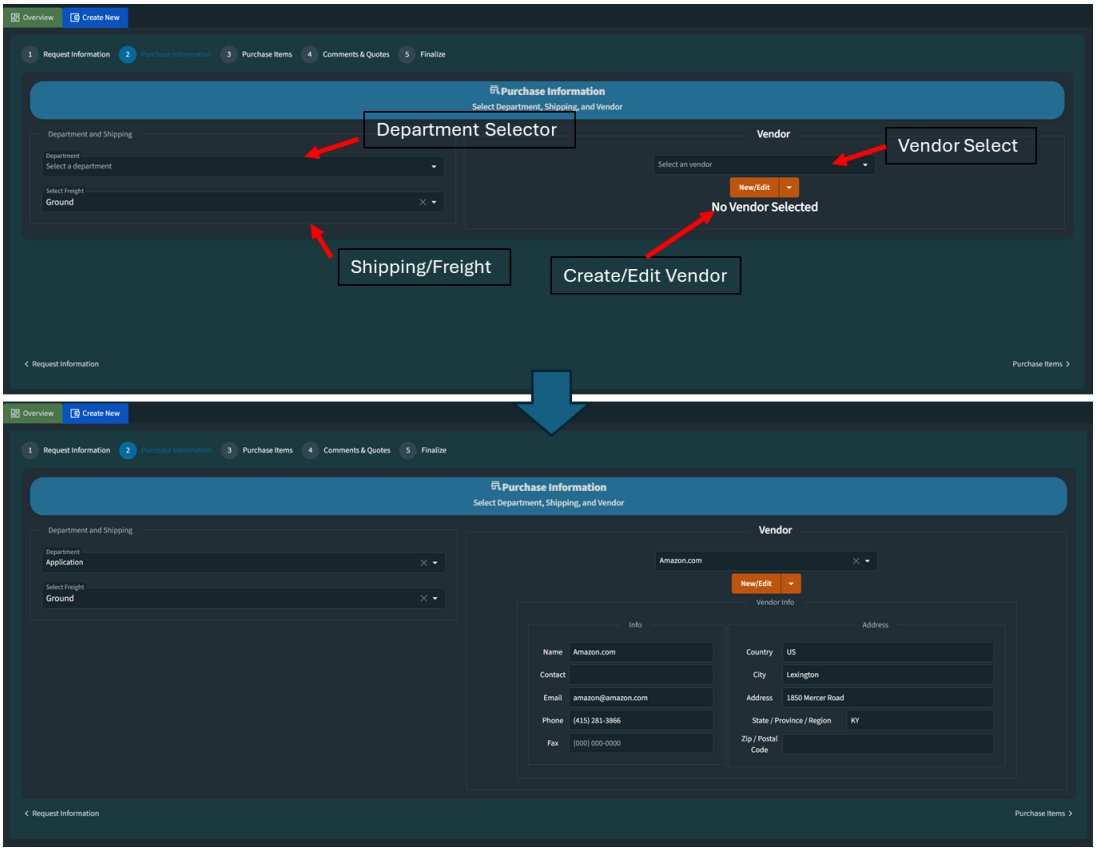

Figure 17: Step 2 (Purchase Info), show the empty form followed by the form filled out

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.

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

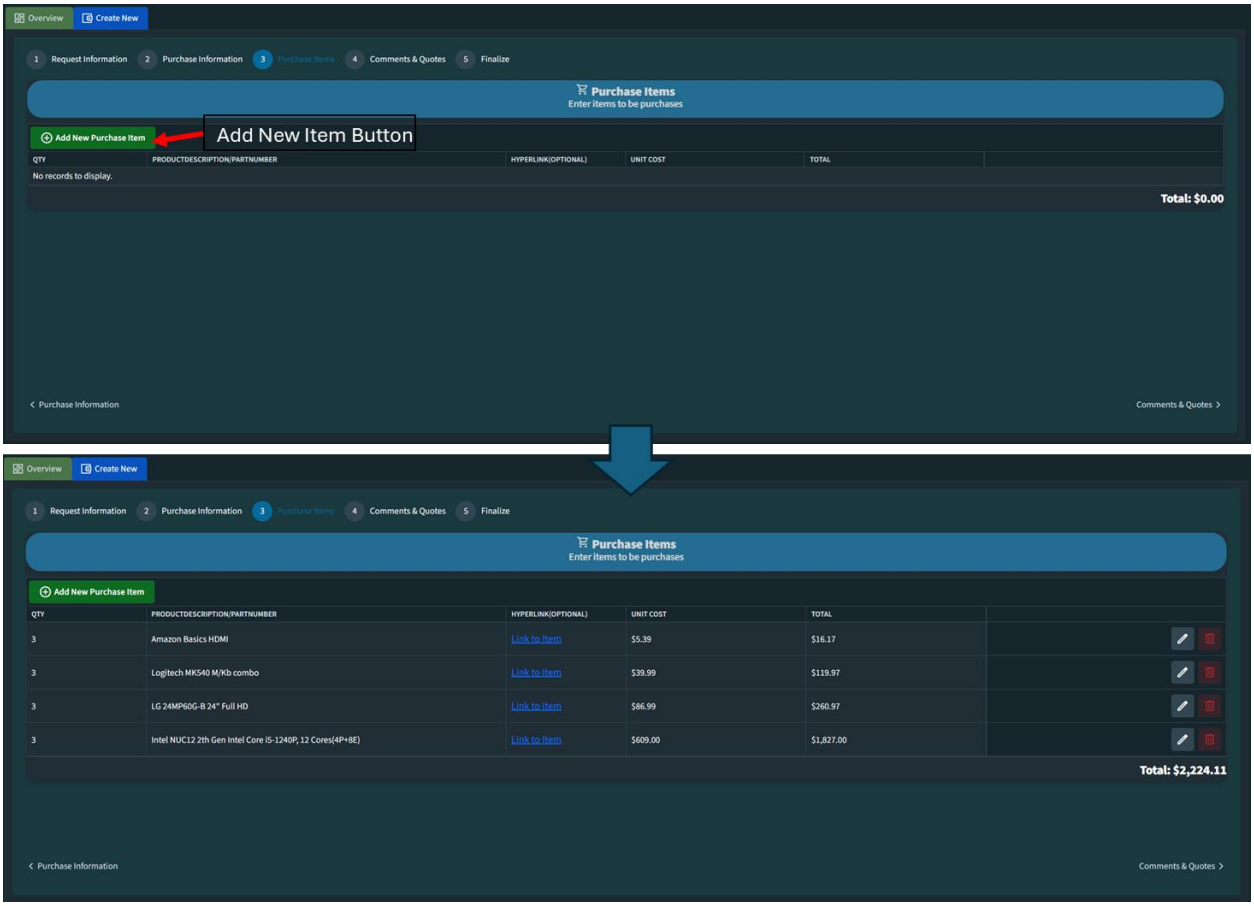

Figure 18: Step 4 (Purchase Items), show the empty form followed by the form filled out

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

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

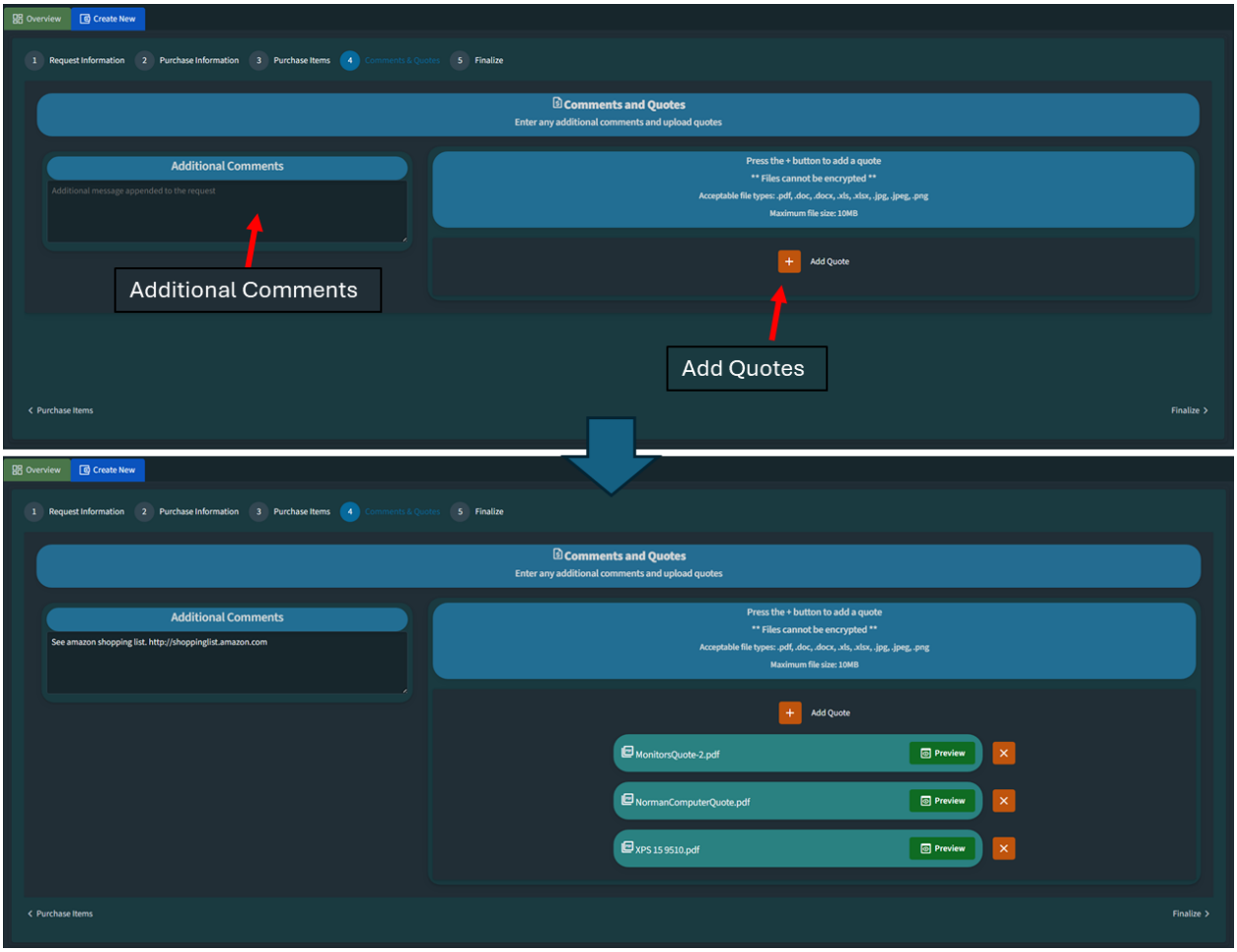

Figure 19: Step 4(Comments & Quotes), show the empty form followed by the form filled out

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 Figures 20 and 21.
15. 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

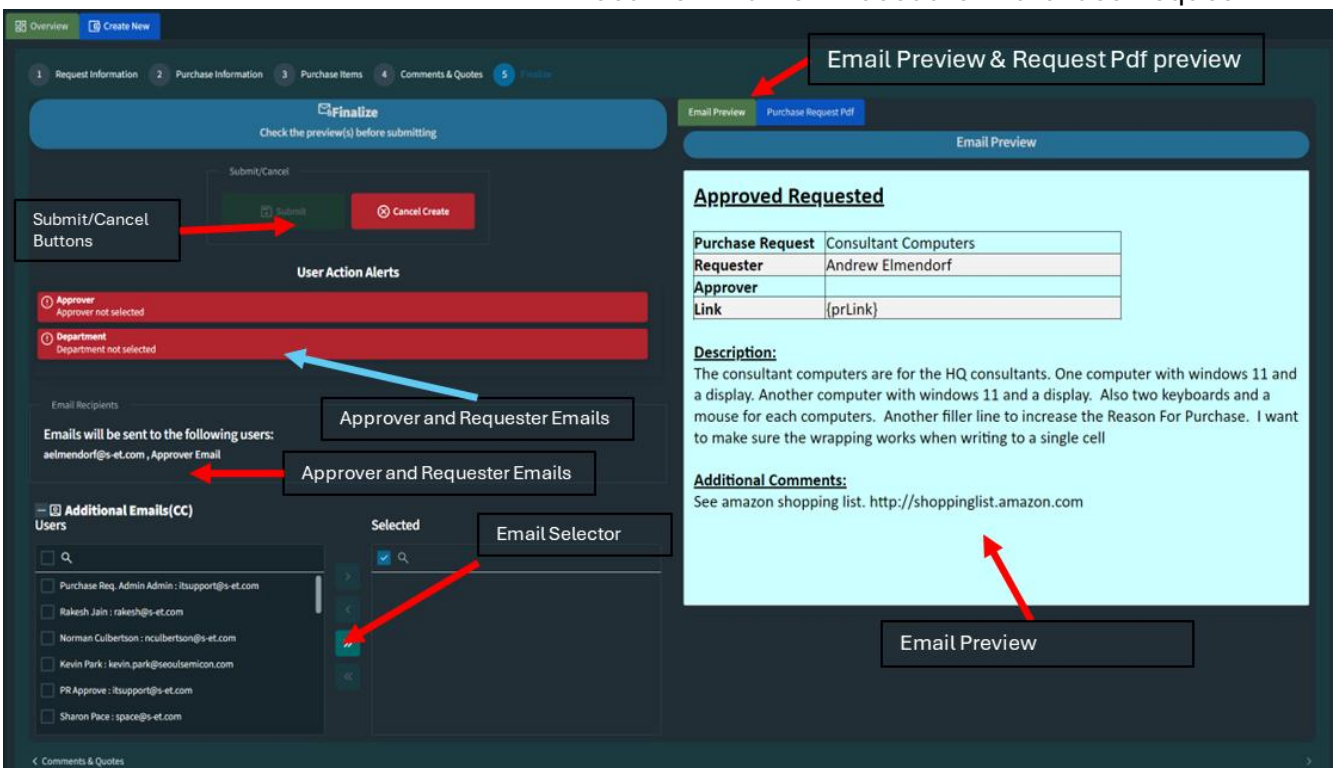

Figure 20: Step 5 (Finalize) shows the final step with labels. This is also an example of a form with errors in the previous steps

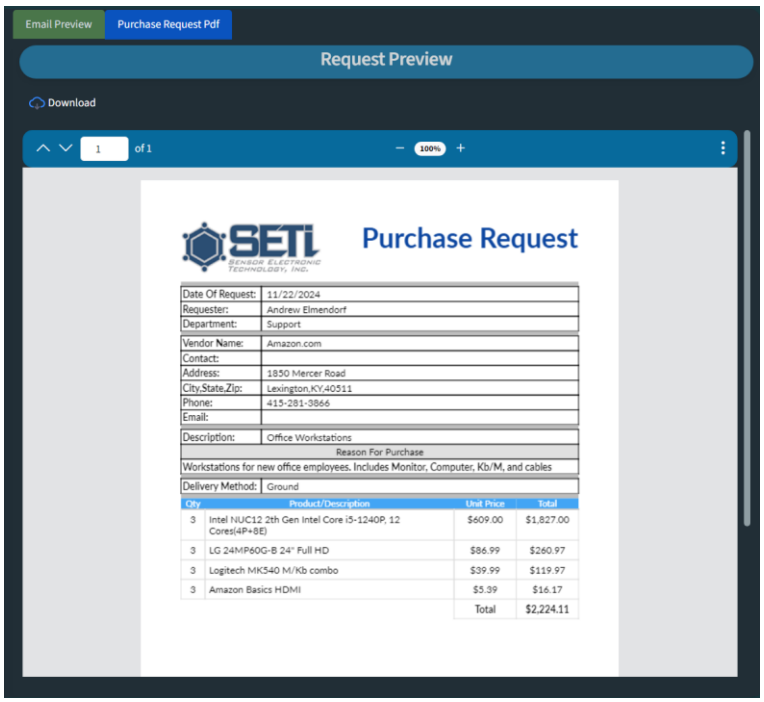

Figure 21: Purchase Request Pdf

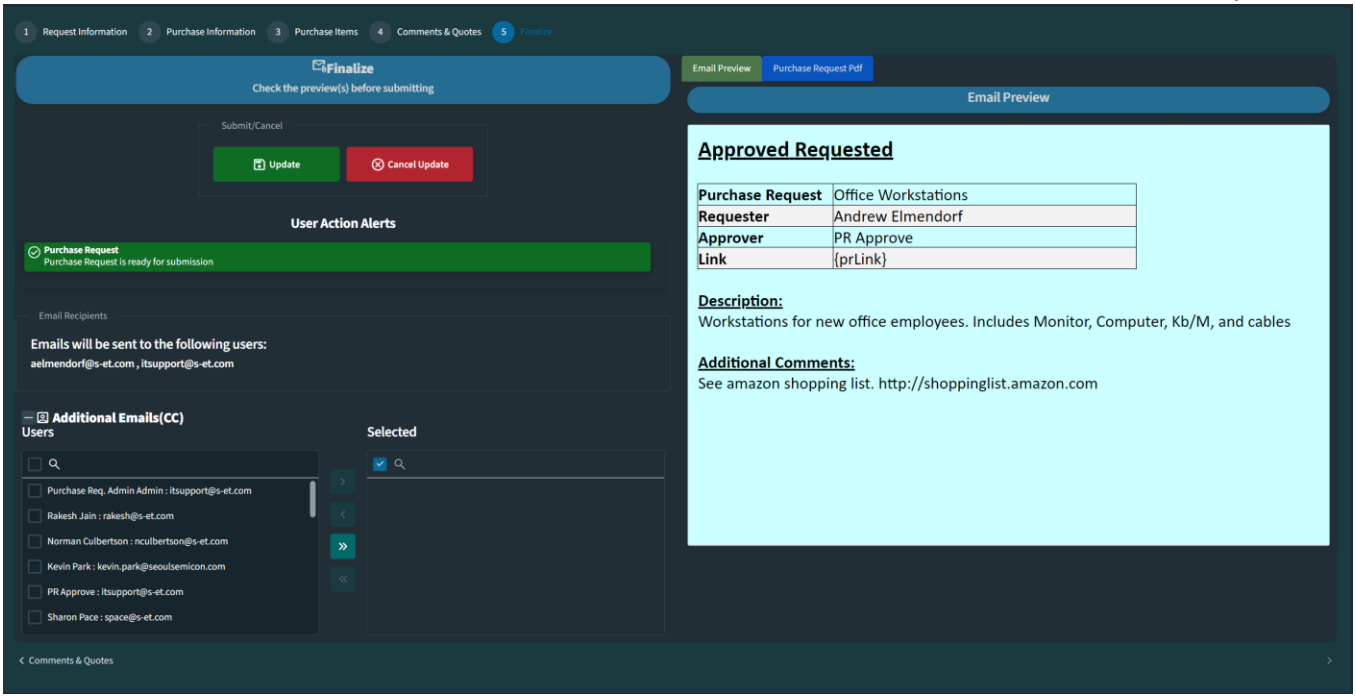

Figure 22: Step 5 (Finalize), shows a properly filled out form ready for submission

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

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

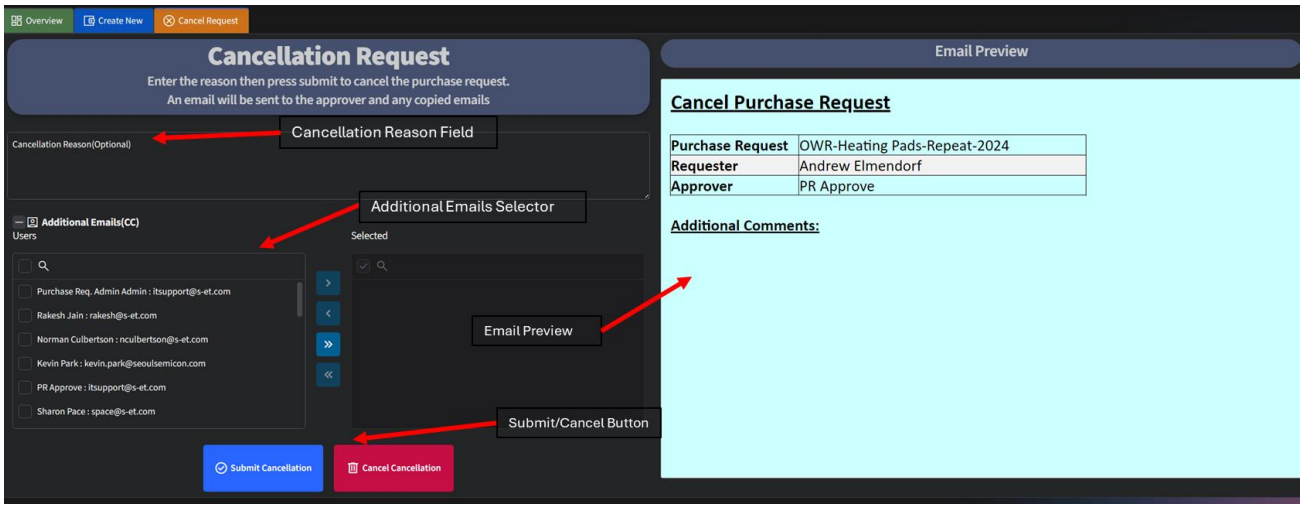

Figure 23: Cancelation Form

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 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

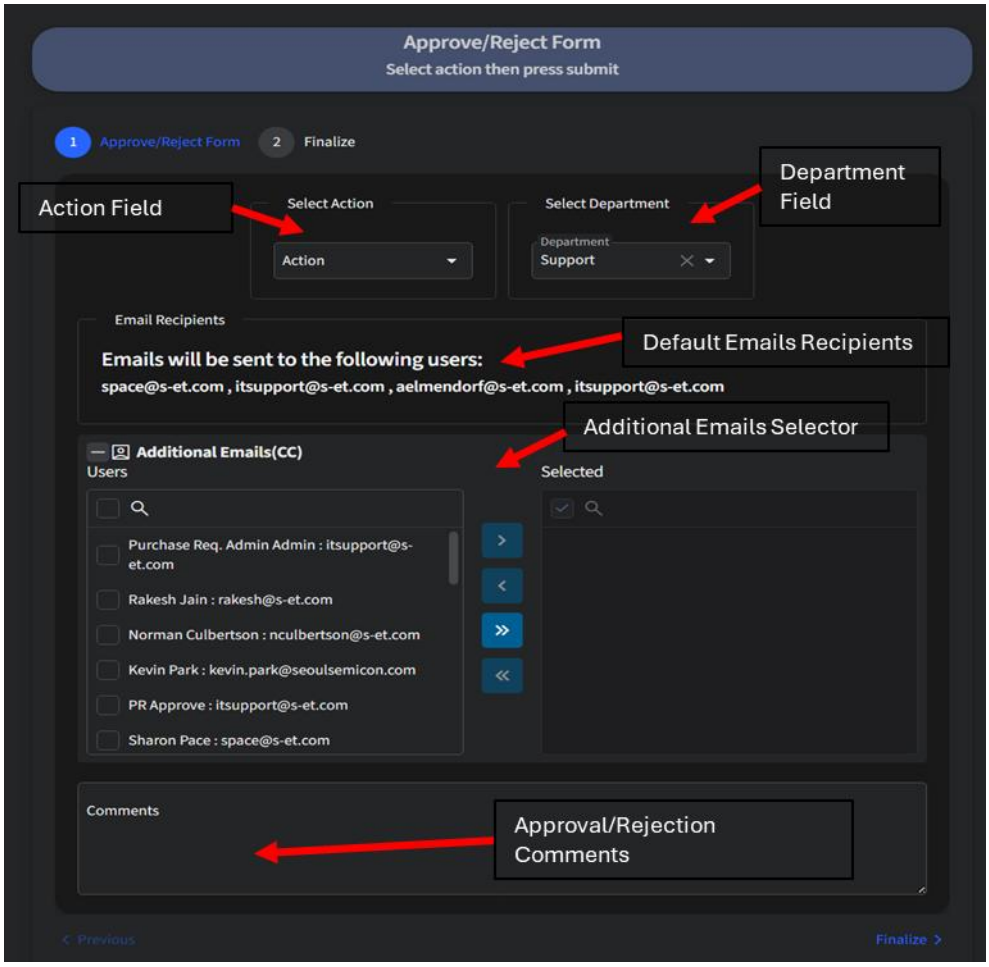

Figure 24: Approval Reject Form with comments

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.

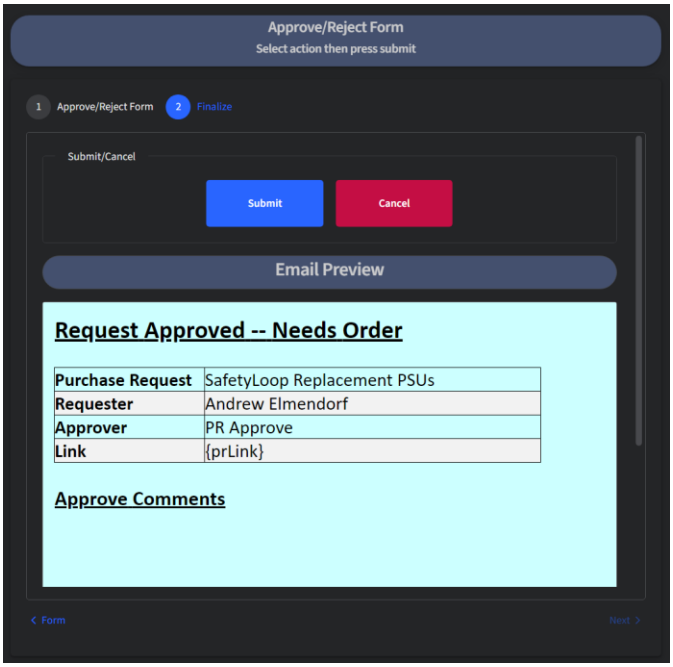

Figure 25: Approve/Reject form-finalize view

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.

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

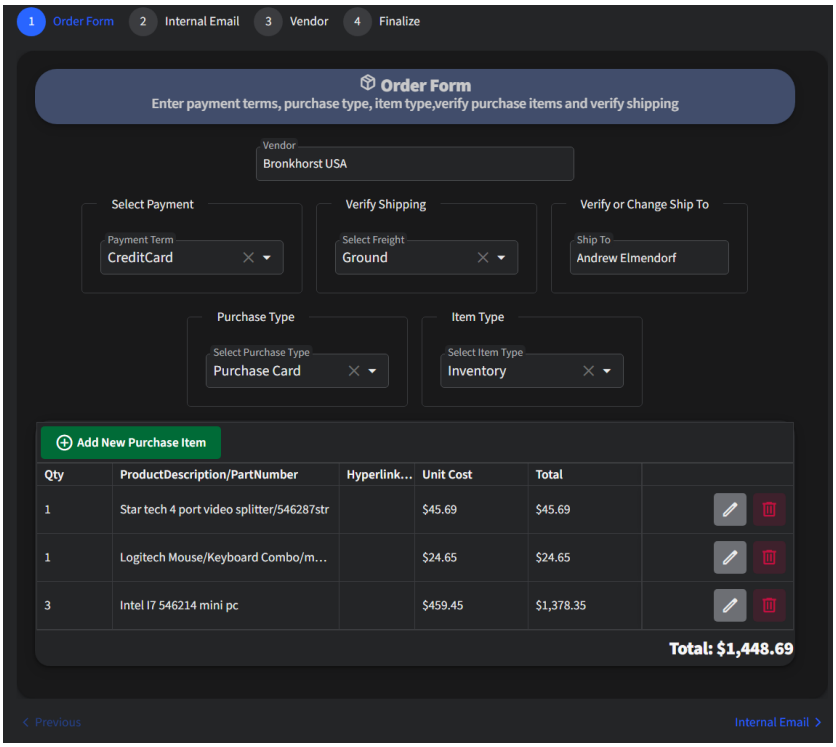

Figure 26: Order form

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”

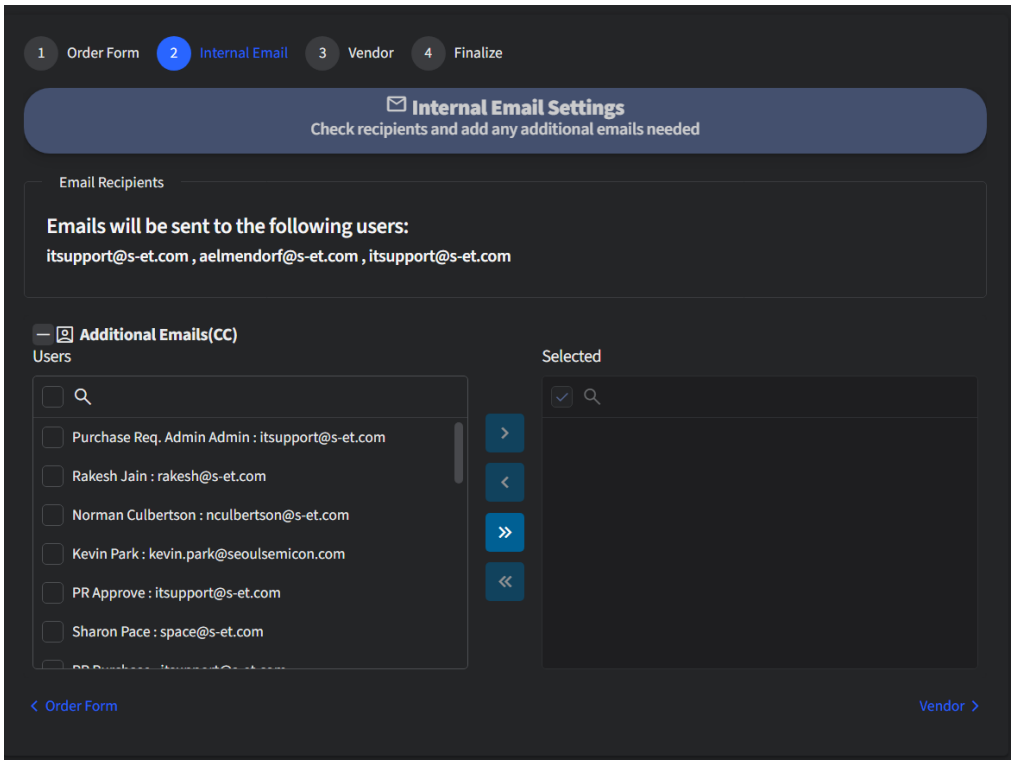

Figure 27: Internal Email Settings

11. Select “Step 3” at the top of the form or click the “Vendor” link at the bottom of the from 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. 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
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

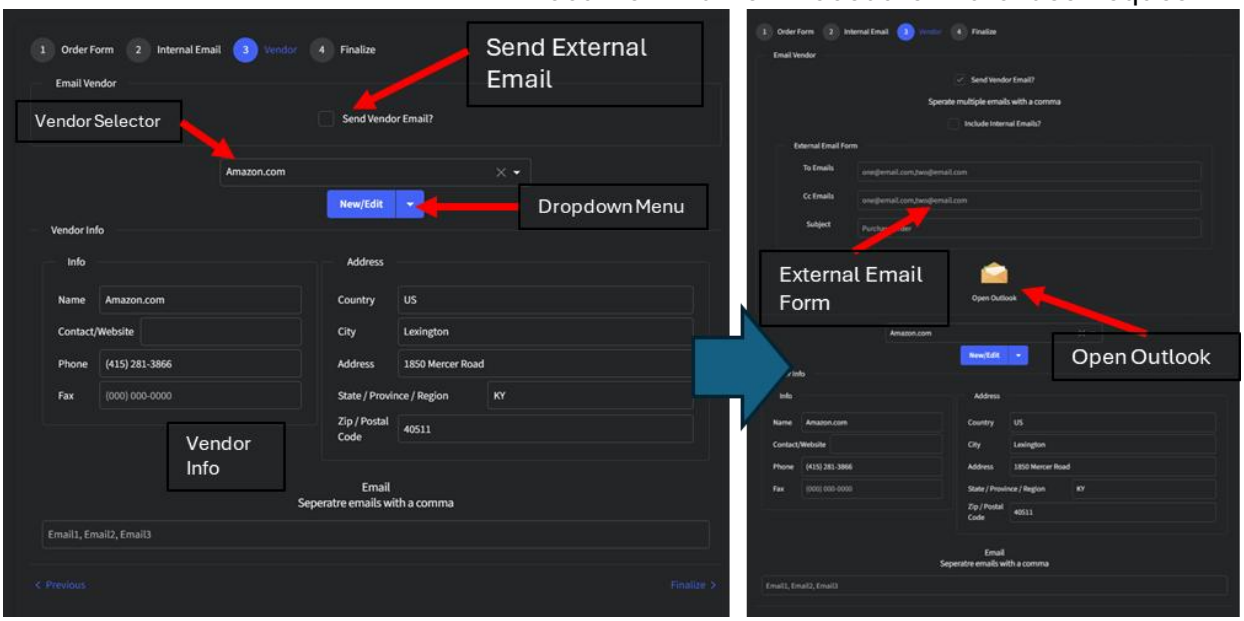

Figure 28: Vendor form

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

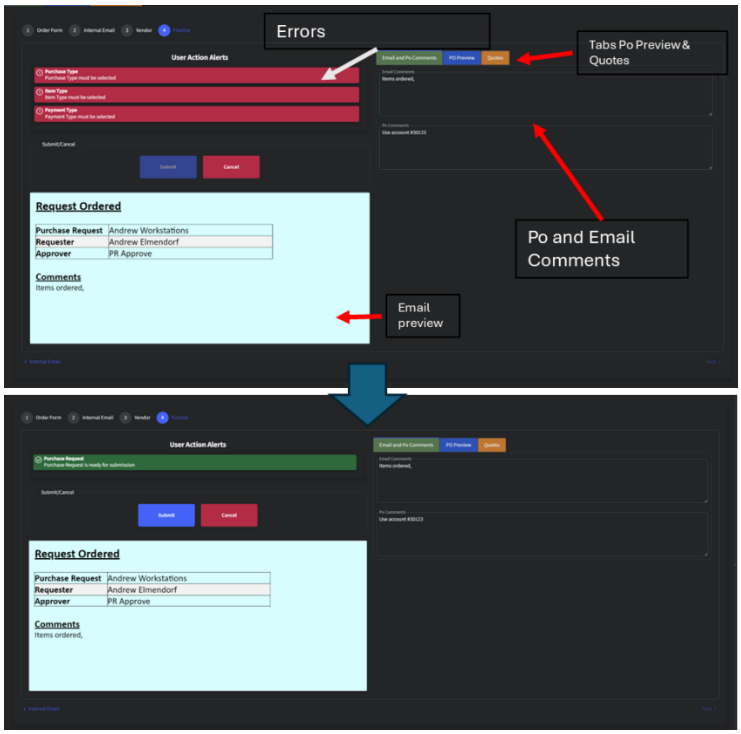

Figure 29: Order finalize step with errors and without

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

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

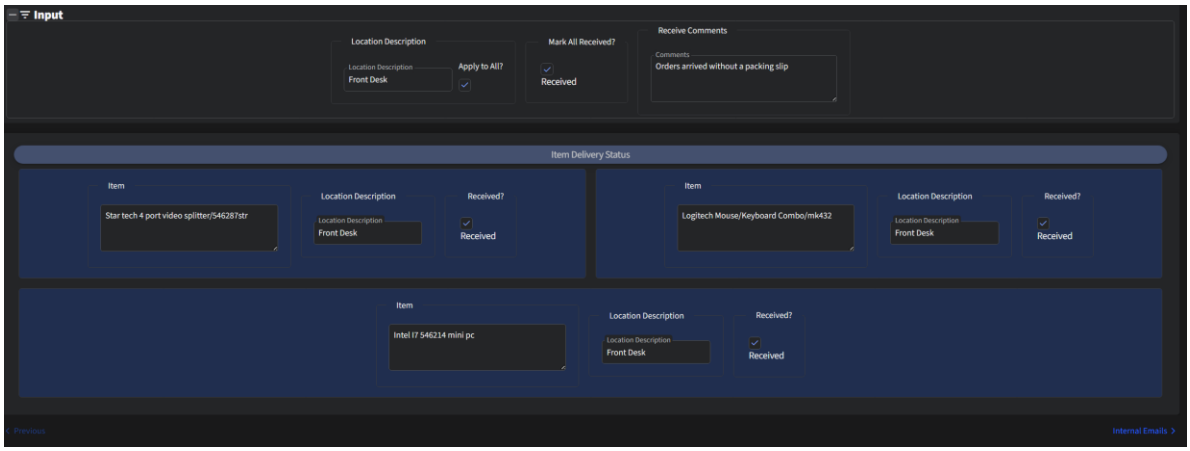

Figure 30: Check-in/Receive Form

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.”

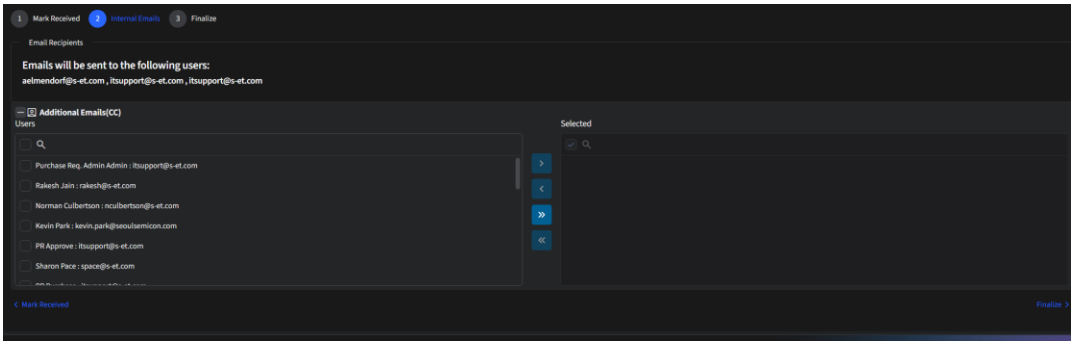

Figure 31: Internal Emails

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

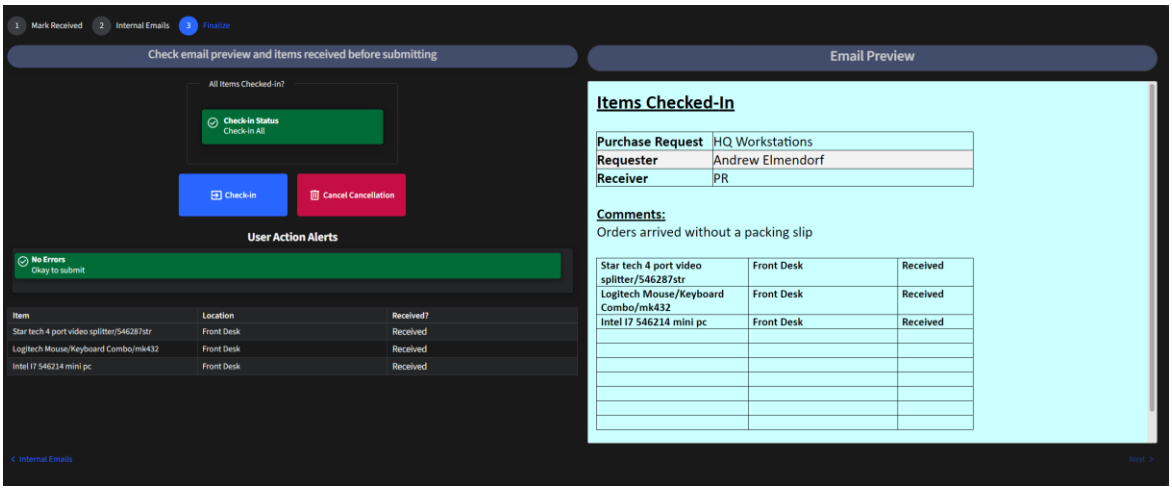

Figure 32: Check-in finalize, all items

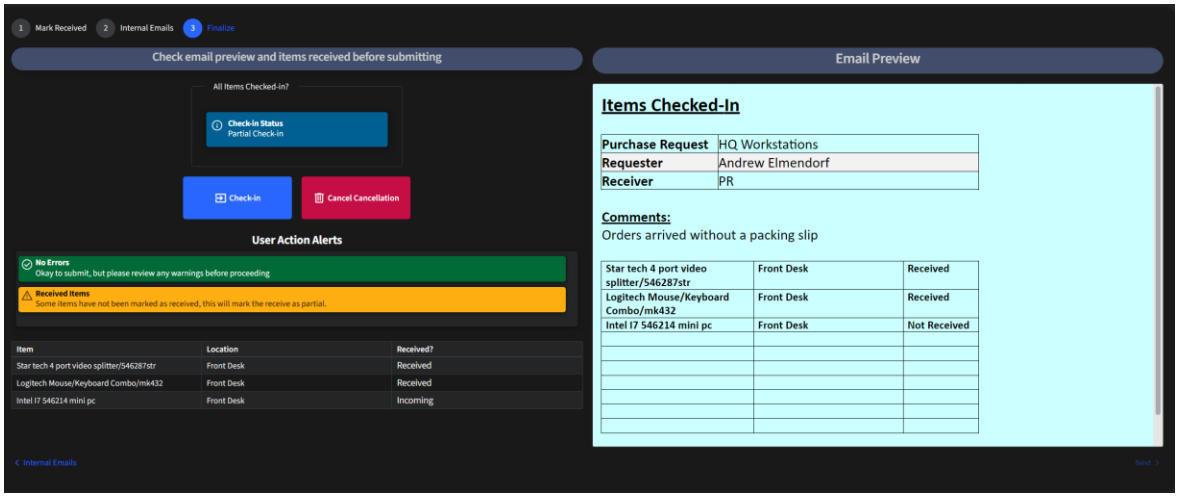

Figure 33: Check-in finalize, partial

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

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	