

A purchase order is used to purchase goods and/or services from a supplier external to the University of Melbourne.

Guidelines for purchase orders

A University of Melbourne purchase order is compulsory for:

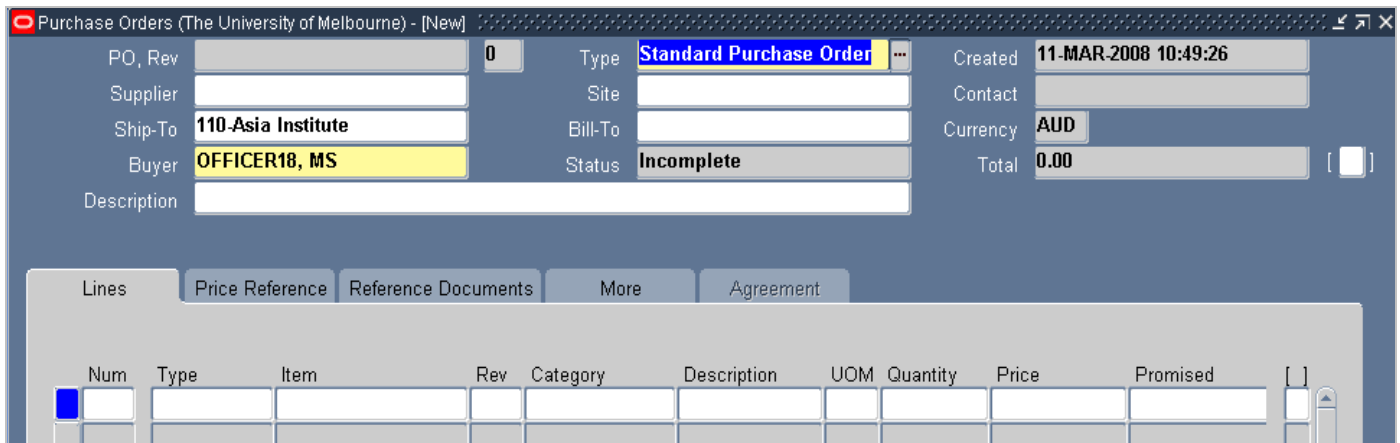
- All purchases greater than \$5,000
- Asset purchases greater than \$1,000
- All software purchases
- Purchases of dangerous goods (i.e.: chemicals and radioactive materials)

Note: all purchases over \$60,000 must be approved by the Tender Board

Creating a purchase order

1 Navigate to **Document Production > Purchase Orders**.

A blank Purchase Orders screen will display.



2 Enter the purchase order header details.

Field	Action	Comment
Type	This field will default to <i>Standard Purchase Order</i> and should not be changed.	
Supplier	Select the appropriate supplier from the List of Values (LOV).	Alternatively, type the full or partial name of the supplier and press Tab .
Site	Select the appropriate site from the LOV, if it is not populated.	This field will populate automatically if a single site is recorded against the supplier record. If the supplier record has multiple sites, you will need to select the appropriate site from the LOV.
Contact	This field will default from the record of the Supplier selected above.	If the supplier has multiple contacts, click on the LOV to view and select the appropriate contact.
Ship-To	This field will default to your department as recorded in your user profile.	Check that this location is correct. If incorrect, select the appropriate department from the LOV.
Bill-To	Select the appropriate department from the LOV.	
Buyer	This will default to your name, but may be changed, if required.	(e.g.: you are entering the purchase order on behalf of another staff member)
Description	Enter a description of the purchase (including the name of the person who requested the purchase order).	Enter a description up to 240 characters. Note: only the first 35 characters will display in the Special Instructions section of the printed order. Further information may be added in the <i>Note to Supplier</i> field under the More tab.

3 Click the **Save** icon on the toolbar to save the purchase order.

Themis will automatically allocate a purchase order number (displayed in the *PO, Rev* field).

Entering line details

- 4 In the **Lines** tab enter the details of the purchase.

Field	Action	Comment
Num	This field default to the first line number available.	
Type	Select the type of purchase form the LOV.	Note: if you are purchasing an asset, select the appropriate asset type based on the dollar amount of the item.
Item	Leave this field blank.	This field is only used when purchasing Inventory items from the Chemistry Store.
Description	Enter a description of the good/services being purchased.	
UOM	The unit of measure (UOM) will default to <i>Each</i> . If required, select an alternative value from the LOV.	If you selected a <i>Service</i> type above, this field will default to <i>Dollar</i> and cannot be changed.
Quantity	Enter the quantity of goods/services being purchased.	If you selected a <i>Service</i> type above, enter the total dollar amount of the service being provided.
Price	Enter the per unit price of the item (excluding GST).	If you selected a <i>Service</i> type above the price field will default to <i>1</i> and cannot be changed.
[] (Descriptive Flex Field)	If you are purchasing an asset, select either <i>Single</i> or <i>Multiple Asset</i> from the LOV.	

Num	Type	Item	Rev	Category	Description	UOM	Quantity	Price	Promised	[]
1	Goods			MISC-MISC	woolly mammoth for	Each	1	12500		

Confirming shipment details

- 5 Click on the **Shipments** button.
The Shipments screen will display.

Num	Org	Ship-To	UOM	Quantity	Promised Date	Need-By	Original Promise	[]
1	UOM	018-USB	Each	1				

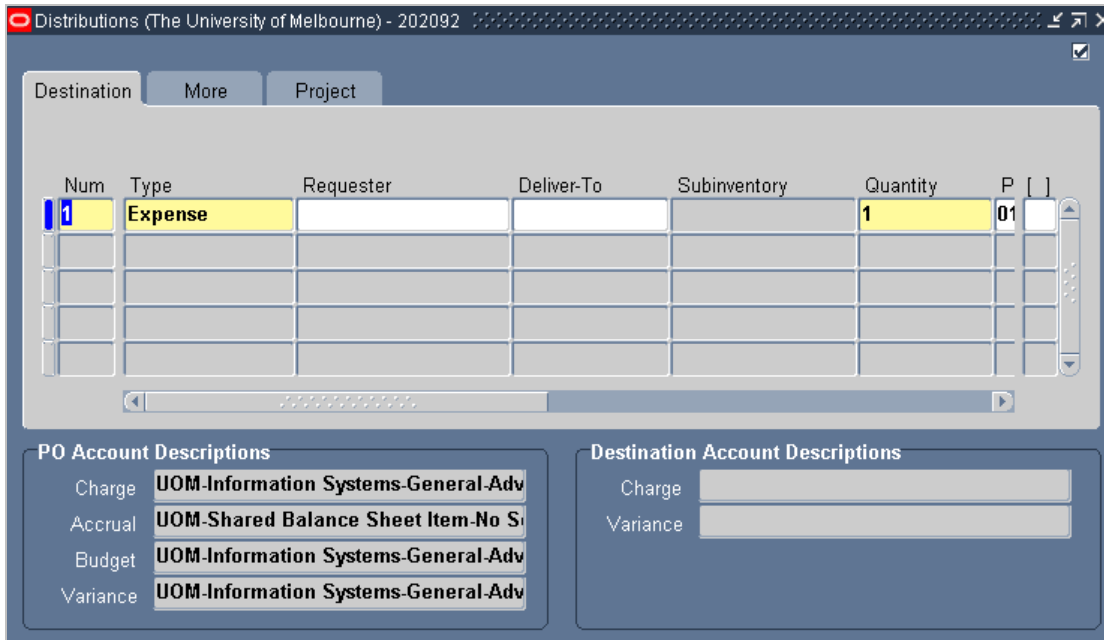
Line Num: 1 Item: woolly mammoth for department foyer

Buttons: Receiving Controls, Distributions

- 6 Confirm that the *Ship To* and *Quantity* fields have defaulted correctly from the purchase order header and lines sections, or change as required.
For example, if the faculty is entering a purchase order on behalf of a department they may wish to change the Ship To location.

Entering distribution details

- 7 Click on the **Distributions** button.
The Distributions screen will display.



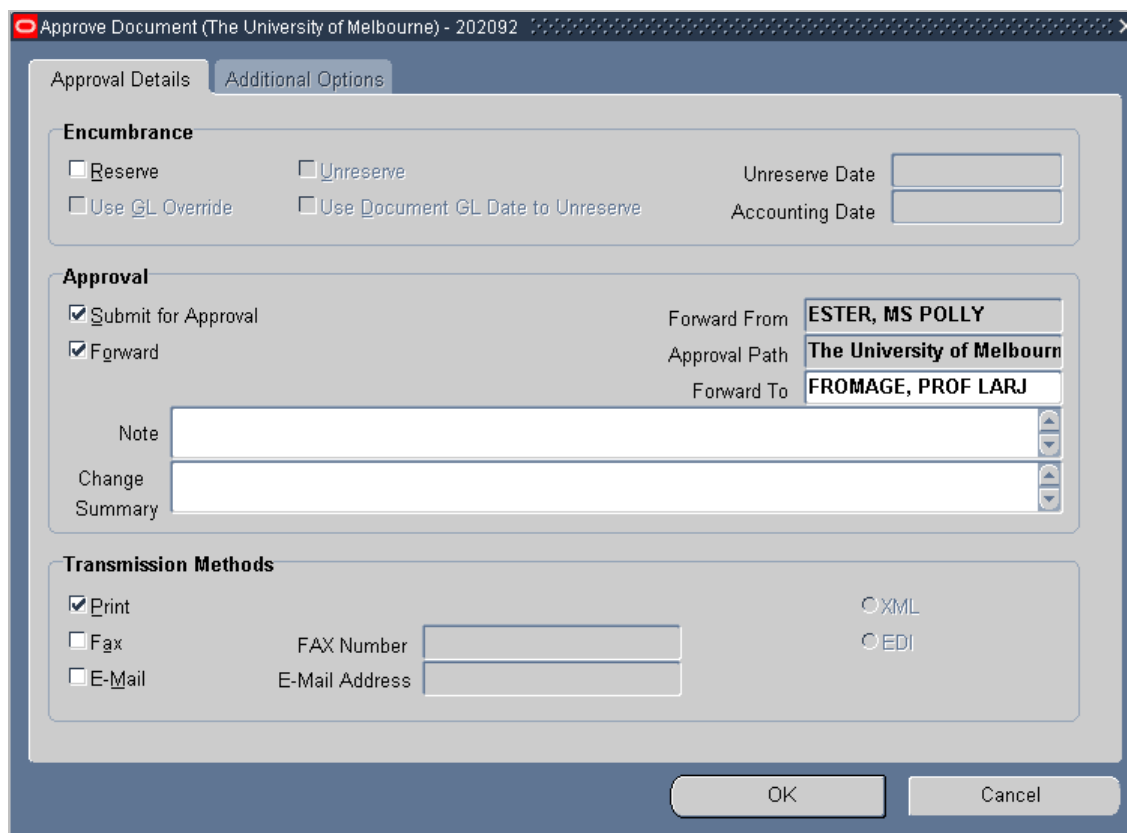
- 8 Complete the distribution details.

Field	Action	Comment
Type	This field will default and should not be changed.	
Requester	Enter the name of the staff member requesting the goods/service, if appropriate.	This field will populate in the <i>Deliver To</i> field on the printed purchase order and may be useful if the person requesting the good/service is different to the person entering the record.
Deliver To	This field will automatically populate from the record of the requester entered above.	
Quantity	This field will default based on the quantity entered in the Lines tab, but may be changed if you are splitting the purchase across multiple accounts.	Important: the quantities entered in the Distribution screen must equal the overall quantity entered in the Lines tab.
PO Charge Account (use the scroll bar at the bottom of the table to view this field)	Enter the charge account details.	<p>Note: if you have set your User Profile defaults the only details you should have to enter is the Natural Account number relevant to the item you are purchasing.</p> <ul style="list-style-type: none"> • 5787 – goods (attractive items <\$1000) • 5788 – asset expensed • 1691 – assets capitalised

- 9 Click the **Save** icon on the toolbar and close the Distributions and Shipments screens to return to the Header screen.
Note: you can save your work at any stage when creating a purchase order.

Sending a purchase order for approval

- 1 In the Header screen, click the **Approve** button in the bottom right hand corner of the screen. The Approve Document screen will display.



- 2 Ensure the **Submit for Approval** and **Forward** checkboxes in the Approval section are ticked. The completed purchase order will be sent to your designated Financial Approver (as recorded in the *UOM Financial Approver* field in your user profile).
- 3 Check that the approver listed in the *Forward To* field is correct. If required, you may select an alternative financial approver from your department/faculty (e.g.: if your regular approver does not have the appropriate financial delegation (i.e.: over \$5,000) or is unavailable).
- 4 Ensure the **Print** checkbox in the Transmission Methods section is ticked. This will ensure the purchase order will automatically print once approved. Tick the **Fax or E-Mail** checkbox if you wish to automatically fax or email (as a PDF attachment) the purchase order directly to the supplier. **Note:** the fax number and/or email address will default from the supplier record, if it has been recorded, otherwise it may be entered or changed.
- 5 Click **OK** to submit the purchase order for approval. Themis will automatically generate a workflow notification that will display in the approver's workbench and, if the purchase order is not actioned on the same day, an overnight email will be sent to the approver.

Once the purchase order has been approved (and provided the **Print** checkbox is ticked) it will automatically print to the default Themis printer of the departmental buyer (creator).