IX-11. How to Create a Purchase Order with Approval Conflicts

Frequently users will share the expense of purchases. When this occurs it creates an approval queue problem since a user cannot approve another's requisition. The procedural solution is as followed:

Procurement:

1. When multiple Departmental FOAPs, Indexes, need to be charged to one requisition the approver Level 4, Dean or equivalent, or the Level 5, Vice President or equivalent, should create the requisition for all chart of accounts and the organization elements under their requisition approval queues.

2. When the requisition contains Departmental FOAP's, Indexes, between Level 5, Vice President or equivalent, the following steps are required:

   a. The user will contact Purchasing via email and advice Purchasing they will be creating multiple requisitions to be merged into one Purchase Order.

   b. Each user will create a requisition with the selected FOPAL's, enter a note in Document Text FOAPOXT stating that the requisition will be merged with another requisition, and have it approved as usual.

   c. The Requistioner shall contact Purchasing via email and provide their respective Requisition numbers to be merged.

   d. Purchasing will execute the appropriate procurement process and when completed will merge the Requisition to a single Purchase Order.

Receiving:

3. Receiving can occur by either Requistioner. One should be chosen and noted in each Requisitioner's Document Text FOAPOXT when the Requisition is created.

Invoicing:

If either Requisitioner receives an invoice or any other supporting documentation, write the Purchase Order number on the invoice, and it is to be forwarded to Business Affairs – Accounts Payable. Be sure and retain a copy for your records.