PO Admin Checklist

BUYER SETUP

This is to be completed by the PO administrators after they have received notification from the module lead in OMB that their personnel have been set up in PeopleSoft.

Each buyer needs to be identified in your business unit before they can be selected as a buyer on a purchase order.

Navigation: ***Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Buyer Set Up***

1. Click the **Add a New Value** Tab.

2. Enter the Buyer's user ID in PeopleSoft if you know it, or else enter "%" and a portion of the individual's last name to search on. Click the look up icon , then click the appropriate user ID.

3. Click **Add**.

4. Select the **Department SetID** (Business Unit).

5. Select the **Ship To SetID** (Business Unit).

6. Select the **Location SetID** (Business Unit).

7. Select the **PO Origin SetID** (Business Unit).

8. Any of the information listed below will default into a purchase order. This will eliminate some keying at creation time. The information isn't locked and can be changed when the purchase order is created.
   a. Select the accounting Department
   b. Select the Ship To location
   c. Select the accounting Location
   d. Select the Origin*
   e. Enter a phone number
   f. Enter a fax number

*Important Note About Origin Codes: Although this field is not required, the Buyer will not be able to put his or her PO through approval workflow without an origin code entered on each PO. If a default origin code is not entered on this page, the Buyer must remember to enter the origin under the Header Details link of every PO.

9. **Default PO Status:** Click **Pending Approval/Approved.** Leaving the status as "Open" prevents further processing of the purchase order, even budget checking.

10. Click **SAVE.** Ignore the 'Dashboard' tab.