

Purchase Orders - Application setup

Setup from scratch

If you haven't used the RPO before or would like to start from the beginning then follow the steps in this article.

1. [Create a new Jira issue type](#) that will represent your Purchasing Orders. Note, that your issue type must be **Standard issue type**, not subtask.

Add Issue Type

Name *

Description

An issue type that will be used in your company to represent purchase requests and orders

Type

Standard Issue Type

Sub-Task Issue Type

Your newly added issue type "Purchase Order" will appear under list of Jira issue types:

Issues

Search Jira admin

Issue types

Add issue type ?

Name	Type	Actions
 Epic A big user story that needs to be broken down. Created by Jira Software - do not edit or delete.	Standard	Edit Delete Translate
 Order A procurement request.	Standard	Edit Delete Translate
 Purchase Order An issue type that will be used in your company to represent purchase requests and orders	Standard	Edit Delete Translate

2. [Import "Raley Purchase Orders template workflow"](#) from Atlassian marketplace. It should appear in the list of inactive workflows of your Jira:

▼ Inactive

Name	Assigned Schemes	Actions
jira (Read-only System Workflow) DEFAULT		View Copy
Builds Workflow (Read-only System Workflow)		View Copy
classic default workflow	<ul style="list-style-type: none">classic	Edit Copy
Raley Purchase Orders Template Workflow		Edit Copy Delete

3. Create a new Jira Core project based on Business template **Procurement** like the following:

Create project

Name

Key



Share settings with an existing project

Template



Procurement

Track all purchases from request to receipt • Ideal for formalizing your purchasing process

[Change template](#)

[Create](#)

4. Go to Settings Issues -> "Issue type schemes" and click on the button "Add issue type scheme" in the top right. Make sure that you have your newly added issue type listed in "Issue types for current scheme window" and that it is also set as Default issue type.

Issues

Search Jira admin

Add Issue Type Scheme

+ Add issue type

Scheme Name*

Purchase Order issue type scheme

Description

Default Issue Type

Purchase Order

Change the order of the options by **dragging and dropping** the option into the desired order. Similarly, **drag and drop** the option from one list to the other to add or remove them.

Issue Types for Current Scheme

Remove all

- Purchase Order

Available Issue Types

Add all

- Task
- Order
- Sub-task (sub-task)
- Epic
- Purchase Request

5. Go to Settings Issues -> "Workflow schemes" link. Choose the Workflow scheme corresponding to your project and click on link **Edit** as shown below:

Workflow schemes

Add workflow scheme ?

Workflow Schemes allow you to define which workflows apply to given issue types and projects.

Active

Name	Projects	Issue Type	Workflow	Actions
KCKP: Procurement Workflow Scheme		<input type="checkbox"/> Unassigned Types	→ KCKP: Procurement Workflow	Edit Copy
KCKPO: Process Management Workflow Scheme		<input type="checkbox"/> Unassigned Types	→ KCKPO: Process Management Workflow	Edit Copy
POFMC: Procurement Workflow Scheme	<ul style="list-style-type: none">• Purchase Orders for My Company	<input type="checkbox"/> Unassigned Types	→ POFMC: Procurement Workflow	Edit Copy
POT2: Process Management Workflow Scheme ⓘ		<input type="checkbox"/> Unassigned Types	→ POT2: Process Management Workflow	Edit Copy

> Inactive

Click on button **Add workflow Add existing** and choose "Raley Purchase Orders Template workflow".

Add Existing Workflow

Jira Workflow (jira)

Builds Workflow

classic default workflow

KCKP: Procurement Workflow

KCKPO: Process Management Workflow

POT2: Process Management Workflow

Raley Purchase Orders Template Workflow

Raley Purchase Orders Template Workflow



Description Simple Purchasing workflow for Raley Purchase Ord

Last modified **Today 12:58 PM** by IP Test

Next

Cancel

Click Next. In the following screen:

Assign Issue Types to "Raley Purchase Orders Template ...

<input type="checkbox"/>	Issue Type	Currently Assigned Workflow
<input type="checkbox"/>	All Unassigned Issue Types	POFMC: Procurement Workflow
<input type="checkbox"/>	Epic	
<input type="checkbox"/>	Order	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Purchase Order	
<input type="checkbox"/>	<input checked="" type="checkbox"/> Purchase Request	
<input type="checkbox"/>	<input checked="" type="checkbox"/> Task	
<input type="checkbox"/>	<input checked="" type="checkbox"/> Sub-task	

Back

Finish

Cancel

Choose your issue type added in p1 and click Finish.

You'll be presented with list of the workflows configured for your project. Remove the previously active workflow (if any) as shown on the screenshot below:

⚠️ There are unpublished changes. Do you want to publish this draft now? **Publish** Discard Draft View Original

POFMC: Procurement Workflow Scheme

DRAFT SHARED BY 1 PROJECT

[Click to add description](#)

Add Workflow ▾

Workflow	Issue Types	Actions
POFMC: Procurement Workflow View as: Text Diagram	<input type="checkbox"/> All Unassigned Issue types	Assign Remove
Raley Purchase Orders Template Workflow View as: Text Diagram Simple Purchasing workflow for Raley Purchase Orders app	<input checked="" type="checkbox"/> Purchase Order ×	Assign Remove

and click on **Publish** button.

6. In POFMC: Procurement Workflow make sure that you've hidden the following transitions from user:

- PO Pending approval PO Approved
- PO Pending approval PO Rejected.

See **Conditions / Optional conditions/ Hide From User Condition** on <https://confluence.atlassian.com/adminjiracloud/advanced-workflow-configuration-776636620.html#Advancedworkflowconfiguration-conditions>

7. Navigate to your project settings Issue types. Click on button Actions Edit Issue Types and make sure that Purchase Order is chosen as an issue type for the current scheme and it is also set as Default issue type.

Scheme Name*
LPO: Procurement Issue Type Schen

Description

Default Issue Type
Purchase Order

Change the order of the options by **dragging and dropping** the option into the desired order. Similarly, **drag and drop** the op

Issue Types for Current Scheme

Remove all

- Purchase Order

Available Issue Types

Add all

- Service Request with Approvals
- Change
- Order
- Problem
- IT Help
- Task
- Improvement
- New Feature
- Bug
- Incident
- Service Request
- Sub-task (sub-task)
- Story
- Registration
- Epic

Save Reset Cancel

Then click on Actions. Use a different scheme and make adjustments as shown below:

Administration

Select Issue Type Scheme for project Live Purchase Order

Please associate the project **Live Purchase Order** with an issue type scheme. If you know the name of the scheme you need, y

There are **0** issues in the project. The current scheme is **LPO: Procurement Issue Type Scheme**.

- Choose an **existing issue type scheme**
- Choose a scheme the **same as an existing project**
- Create a new scheme** and associate with current project

Issue Type Scheme	
Default Issue Type Scheme	
DOC: Software Development Issue Type Scheme	
JAD: Project Management Issue Type Scheme	
JAD: Software Development Issue Type Scheme	
JIF: Software Development Issue Type Scheme	
JSQ: Task Management Issue Type Scheme	
LPO: Procurement Issue Type Scheme	
MYSD: Jira Service Desk Issue Type Scheme	
NOT: Software Development Issue Type Scheme	
POD: Kanban Issue Type Scheme	
Purchase Orders issue types scheme	
RAP: Kanban Issue Type Scheme	
RAP: Kanban Issue Type Scheme (1)	
TEST: Project Management Issue Type Scheme	
TSDP: Jira Service Desk Issue Type Scheme	

Issue Types for Scheme: Purchase Order

OK Cancel

8. Log in as Jira user that was used to install Raley PO app in the UPM. That user is automatically assigned to **Company Admin** privilege in Raley PO and it should be used to create other Raley PO users.

Navigate to your Jira Universal Plugin Manager, choose *Raley Purchase Orders* and click on **Configure** button.

- a. In **Jira config** tab assign the following:
 - i. **Purchase Orders project** - the project that you've created in step (3)
 - ii. **Purchase Orders issue type** - the issue type you've created in step (1)
 - iii. **JSM Request type** - the JSM request type for which you want the Raley PO to be shown if you're on a JSM project. By default, it will not be visible
 - iv. **Statuses** as shown on the screenshot below

Jira config	Company	Departments	Employees	API & Integrations
Purchase Orders* project			Live Purchase Order	▼
Purchase Orders* issue type			Purchase Order	▼
JSM Request Type			Choose Request Type	▼
Initial (draft)* status			PO Draft	▼
Submitted for* approval status			PO Pending Approval	▼
Order approved* status			PO Approved	▼
Order rejected* status			PO Rejected	▼
Order paid status			PO Paid	▼
Order number custom field			Choose a field	▼

Save

- i. **Order number custom field** - a custom field in your Jira from which to retrieve purchase order number. More information on automatic generation of PO# is available [here](#)

For more information about the statuses and their business meaning please [refer to this article](#)

- a. In **Company** tab assign the following
 - i. **Company name** - name of your Company
- b. In **Departments** tab - you define your company's organisational units and their details. At this point do not specify Employees for the department, as you will do that in the next step.
- c. In **Employees** tab - you configure your Jira users as company employees. One employee can be associated to 1..N departments and can also have multiple roles. If employee has Approval role then you should also provide his/her approval limit.
- d. **API & Integrations** tab - token for your B2B integration with our app

9. Add an employee with **Finance** role - he or she will need to configure [Default currency](#), [Taxes](#), [Budgets](#) and Suppliers applicable for your company

Setup for already existing Purchase Order project

Raley Purchase Order makes the following assumptions about your instance:

- 1) One Jira instance is used by 1 organisation
- 2) All purchasing processes in this organisation are currently run in 1 Jira project

This effectively means that you can have several Jira projects meant for running your purchasing processes, however, only one of them will be actively connected to the Raley Purchase Orders.

This setup is applicable if you either previously used Raley Purchase Orders and have actual orders data or if you decided to switch to a different Jira project/issue type/workflow for running your purchasing processes. Switching to a different Jira project/ issue type/ workflow **will not erase your data** from Raley PO. It will stay there as is and you can always return to it by changing configuration as indicated in previous paragraph (4, 5a, 5b).

It is important to understand that while the actual purchase order related data stays intact in our add-on, your inactive (from Raley PO perspective) Jira project continues to live on its own pace, so there could be inconsistencies between statuses of the tickets in Jira and the statuses of appropriate purchase orders in Raley PO.

