PReq, Catalog & eBuy Process Flow

Key:

PS-PeopleSoft PA-Purchasing Agent
PO-Purchase Order SC-Shopping Cart

Purchase Requisition - (PReq)

Department creates PReq and sends to Workflow

Order <$5000

PReqs assigns PO# after Departmental approval

Order $5000-$25,000
Capital Equipment/Blankets

After Departmental approval PReq routed to PA

PA reviews, edits, approves PReq (PA bids order if needed)

Order >$25K

PReqs assigns PO# after Purchasing approval

PA routes to Purchasing Manager/Director for approval

PReqs assigns PO# after Manager/Director approval

PReq loads to PS which creates PO

Department receives email PO is created

Vendor receives PO via fax/email from Purchasing next day

PeopleSoft Catalog Orders

Department creates Catalog Order

Stock items on contract sourced from Stores

Non-stock items on contract from vendor

Item sourced from Warehouse

Item sourced from Vendor

PReqs assigns SC# and Stock ID #

Loads to PS inventory automatic replenishment

Item sourced from Warehouse (Picked) and shipped

PReqs assigns SC#

Amount under Threshold for Vendor

PReqs assigns Req ID#

PReq loads to PS which creates PO

Amount over Threshold for Vendor

PReqs assigns Req ID# and Dept. sends to Workflow

Departmental approval PReq loads to PS which creates a PO

Catalog Order form is used for Items Sourcing from a Warehouse and Items Sourcing from a Vendor that have a PeopleSoft UI Item number. You will be able to place orders for items without knowing or caring if they are stocked in the warehouse or purchased from an external vendor. The system will make this determination and create multiple requisitions when necessary.

Department and PA receives email PO is created

Vendor receives PO via fax/email from Purchasing next day

eBuy Orders

Shopper creates an eBuy Order

Shopper can be an Initiator or Requester

Shopper searches for items or searches hosted catalog(s) and adds items to cart

Shopper assigns cart to Initiator/Requester for review and makes any necessary edits

Initiator/Requester places order

Cart loads to PReqs EB# assigned

Initiator/Requester accesses cart in PReqs, review, edits, and submits

A separate PReq is created for each supplier whose items are contained in the cart

Initiator accesses each PReq, does final review, and sends PReq(s) to Workflow

≤ $9,999 and IACT 6730/6740

After Departmental approval, PReq loads to PS

10K-25K

≤ $9,999

PA reviews, edits, approves PReq

PO paid by Ghost Card?

Yes

PO loads from PReqs with a status of complete

>25K

No

PA routes to Purchasing Manager/Director for approval

PO resides in PeopleSoft with a Status of Dispatched and is paid by PeopleSoft voucher process

PO sent to Sciquest Order Manager and dispatched to Supplier via cXML

Standard invoicing instructions sent with PO

Ghost Card # sent to supplier with each PO

Supplier sends invoice to Accounts Payable. Standard voucher process follows.

OR

Supplier charges purchase to Ghost Card