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PURCHASING USER MANUAL

FEATURES AND BENEFITS, AND REQUISITION TO PURCHASE ORDER PROCESS

INTRODUCTION

The Purchasing application offers several features and benefits to state agencies that are designed to reduce time and effort and to enhance each agency's business processes. Smaller agencies that cannot afford enterprise purchasing systems can be set up to use the SCO Purchasing application. Help line support, training, and end user documentation are provided. The State of Idaho will benefit by the reduced cost of doing business.

WEB-BASED INTERFACE

The Purchasing application is a web-based application that is easy to navigate and flexible enough to allow for a variety of business processes across state agencies. Each agency will be able to keep or enhance their business processes when using the Purchasing application. Each agency can also set up elements of the application (workflows, e.g.) to make it more relevant to their own processes. The specific steps to enter and approve requisitions and purchase orders in the application will depend on [the business processes of each individual agency](#).

BUSINESS PROCESS ENHANCEMENTS

Different workflows can be set up for a variety of unique approval processes. For example a workflow for requesting IT equipment can be set up with different approvers than a workflow for office supplies. [Watch a video demonstrating requisition workflows](#). In addition, requisition numbers and purchase order numbers can be automatically created when a requisition or purchase order is saved so that you do not have to manually keep track of numbers in a separate spreadsheet or system.

If your agency uses Payment Services, purchase orders can be imported into Payment Services so that all of the purchase order line items and their fiscal coding automatically populate the payment transactions – they do not have to be manually re-entered.

IMPROVED DATA ENTRY TASKS

Simple data entry tasks are greatly enhanced in the Purchasing application. When entering requisitions, fiscal code fields are automatically verified by the application. Also, several fiscal code fields, such as PCA or Index, can be easily searched. When the correct ones are found and selected, any other related fields are automatically populated,

saving time and reducing errors. You can also set up templates to use for future requisitions so that the data entry does not have to be manually re-entered. The templates can be modified to fit each successive purchase request.

These features reduce the amount of time spent on data entry and also reduce the likelihood of errors due to manual data entry processes.

UPLOADING SCANNED DOCUMENTS

Another new feature of the Purchasing application is the ability to upload scanned documents and attach them to a requisition or purchase order, thereby saving time and money in delivery as well as costs of storing and managing paper documents. It will make business process more efficient since all supporting documentation would be immediately available for review or approval.

E-MAIL NOTIFICATION

There are automatic email notifications to approvers, requesters, etc., when transactions are ready for approval or when requested items have been received. This enhances the communication within the agency by automating the e-mails, rather than using one system for data entry and approval and another for e-mail or messaging.

REQUISITION TO PURCHASE ORDER PROCESS

1. Administrator
 - Add users and assign roles
 - Set up at least one workflow with at least one level and one approver
 - Set up Departments if needed
2. Create Requisition
 - Assign the Requisition to a workflow (and Department if needed).
 - Attach scanned documents
 - Add Fiscal Coding
3. Approve or Reject Requisition
4. Create Purchase Order
 - Add items from one or more requisitions
 - Select a vendor
 - Attach scanned documents.
5. Approve Purchase Order if required
6. Print and Send Purchase Order to Vendor
7. Receive Purchase Order Items
 - Mark items as received, backordered, damaged, etc.
8. Import Purchase Order into Payment Services if applicable