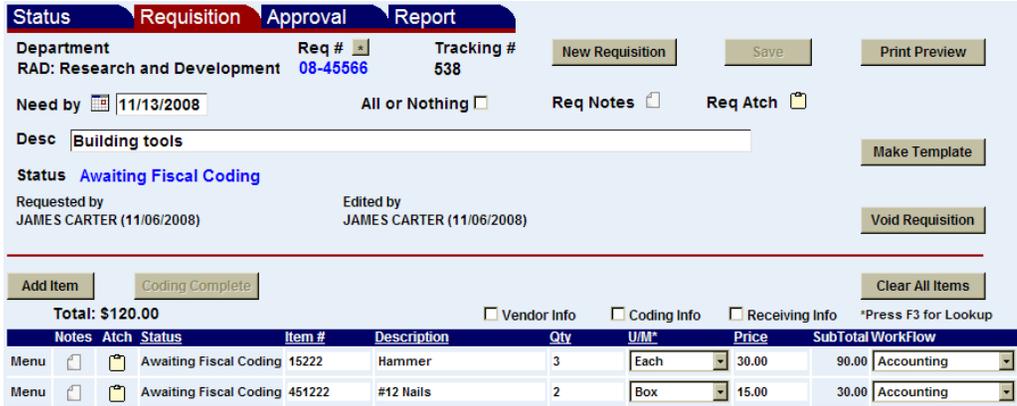


USING THE PURCHASING APPLICATION FOR YOUR AGENCY'S PROCESSES

It is important to accurately create some sort of flow chart or map of your existing processes to prepare to use the Purchasing application. Below is a basic example of an agency's process with corresponding processes in the Purchasing application. Some existing business processes in the agency may need to change or be created in order to adopt the Purchasing application.

Example of existing Agency Processes	To apply a corresponding Purchasing application processes																														
<p>Request from end user.</p> <p>Agency rule: Under \$100, the end user may purchase, with supervisor approval.</p>	<h3>Create Requisition</h3>  <p>Status Requisition Approval Report</p> <p>Department RAD: Research and Development Req # 08-45566 Tracking # 538</p> <p>Need by 11/13/2008 All or Nothing Req Notes Req Atch</p> <p>Desc Building tools</p> <p>Status Awaiting Fiscal Coding</p> <p>Requested by JAMES CARTER (11/06/2008) Edited by JAMES CARTER (11/06/2008)</p> <p>Total: \$120.00</p> <table border="1"> <thead> <tr> <th>Notes</th> <th>Atch</th> <th>Status</th> <th>Item #</th> <th>Description</th> <th>Qty</th> <th>U/M*</th> <th>Price</th> <th>SubTotal</th> <th>Workflow</th> </tr> </thead> <tbody> <tr> <td>Menu</td> <td></td> <td>Awaiting Fiscal Coding</td> <td>15222</td> <td>Hammer</td> <td>3</td> <td>Each</td> <td>30.00</td> <td>90.00</td> <td>Accounting</td> </tr> <tr> <td>Menu</td> <td></td> <td>Awaiting Fiscal Coding</td> <td>451222</td> <td>#12 Nails</td> <td>2</td> <td>Box</td> <td>15.00</td> <td>30.00</td> <td>Accounting</td> </tr> </tbody> </table>	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal	Workflow	Menu		Awaiting Fiscal Coding	15222	Hammer	3	Each	30.00	90.00	Accounting	Menu		Awaiting Fiscal Coding	451222	#12 Nails	2	Box	15.00	30.00	Accounting
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<p>Agency rule: Over \$100, a requisition must be filled out.</p> <p>End user or end user's clerical fills out requisition for request.</p>	<h3>Authorize Requisition if necessary</h3>  <p>Status Requisition Approval Reports</p> <p>Department SYS: Systems Admin. Req # SYS08004 Tracking # 226</p> <p>BFY 2008 Need by 03/26/2008 All or Nothing Req Notes Req Atch</p> <p>Desc Microwaves</p> <p>Status Awaiting Authorization</p> <p>Requested by PATRICIA ROLLER (03/19/2008) Edited by JAMES CARTER (03/19/2008)</p> <p>Total: \$200.00</p> <table border="1"> <thead> <tr> <th>Notes</th> <th>Atch</th> <th>Status</th> <th>Item #</th> <th>Description</th> <th>Qty</th> <th>U/M*</th> <th>Price</th> <th>SubTotal</th> <th>Workflow</th> </tr> </thead> <tbody> <tr> <td>Menu</td> <td></td> <td>Awaiting Mgr</td> <td></td> <td>Microwaves</td> <td>2</td> <td>Each</td> <td>100.00</td> <td>200.00</td> <td>Admin</td> </tr> </tbody> </table>	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal	Workflow	Menu		Awaiting Mgr		Microwaves	2	Each	100.00	200.00	Admin										
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Example of existing Agency Processes

Requisition routed to end user supervisor for budget and approval.

To apply a corresponding Purchasing application processes

Fiscal Coding

Status Requisition Approval Reports

Department: BHS: BUREAU OF HOMELAND ST Req #: B0800018 Tracking #: 155

BFY: 2008 Need by: 01/14/2008 All or Nothing: Req Notes: Req Atch:

Description: Packs

Status: Awaiting Line Approval

Requested by: TIM TRACE (01/07/2008) Edited by: JAMES CARTER (01/07/2008)

Total: \$400.00

Notes	Atch	Status	Item #	Description	IC	R	Ref Doc	Siz	Mod	PGA	Index	ExpSub	Dtl	RevSub	Dtl	Grant	Ph	Project	Ph	BU
Menu	<input type="checkbox"/>	Awaiting Infr	A1	Packs	230					10051	1200	5101				1BURLY 08	ARMOPS 08	GVOA		
Menu	<input type="checkbox"/>	Awaiting Infr	A2	Packs	230					10051	1200	5101				1BURLY 08	ARMOPS 08	GVOA		

Create Workflow approval levels and add approvers

Workflow Department

Work Flow

Workflow	Active
Select Edit Del CSC	<input checked="" type="checkbox"/>
Select Edit Del Worker	<input checked="" type="checkbox"/>

Worker Levels

Level	Up	Dn
Select Edit Del Worker Level 1	Up	Dn
Select Edit Del Worker Level 2	Up	Dn

Worker Level 1 Level Approvers

Approver	Active
Edit Del ROCHENDA REYNOLDS	<input checked="" type="checkbox"/>
Add TU ANH BOCKENSTETTE	<input checked="" type="checkbox"/>

Requisition routed to fiscal officer for final approval.

Workflow approval levels and approvers

Workflow Department

Work Flow

Workflow	Active
Select Edit Del CSC	<input checked="" type="checkbox"/>
Select Edit Del Worker	<input checked="" type="checkbox"/>

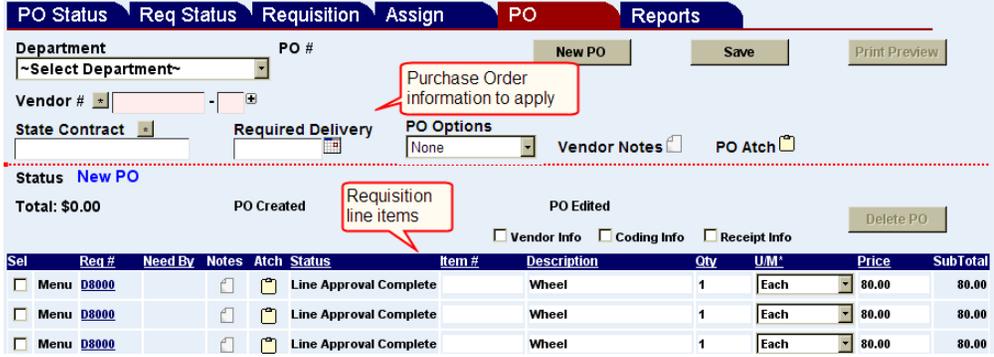
Worker Levels

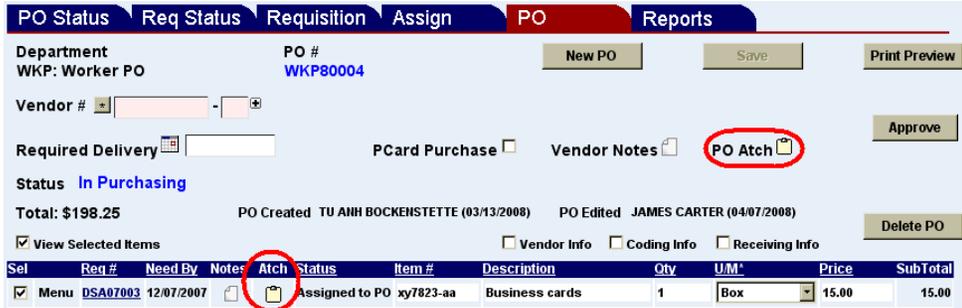
Level	Up	Dn
Select Edit Del Worker Level 1	Up	Dn
Select Edit Del Worker Level 2	Up	Dn

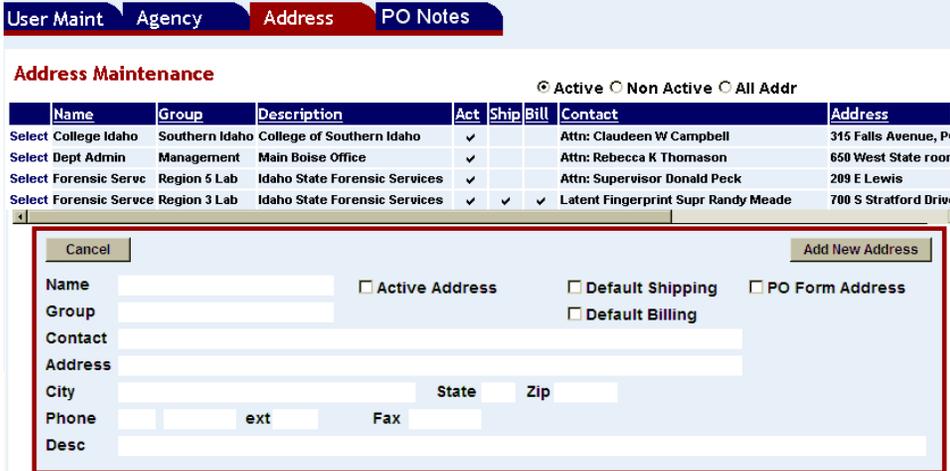
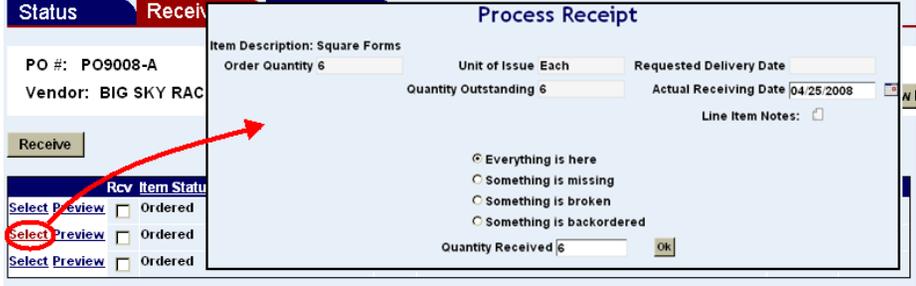
Worker Level 1 Level Approvers

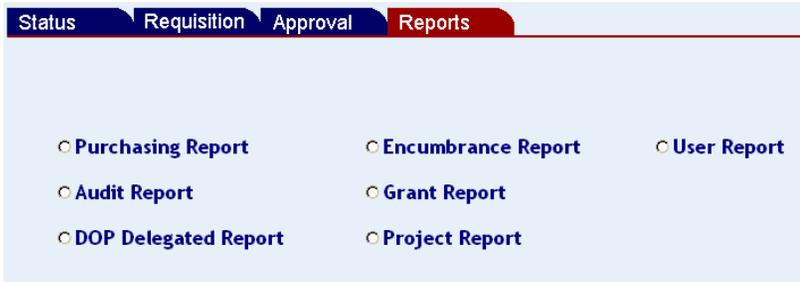
Approver	Active
Edit Del ROCHENDA REYNOLDS	<input checked="" type="checkbox"/>
Add TU ANH BOCKENSTETTE	<input checked="" type="checkbox"/>

Final Approval Level

Example of existing Agency Processes	To apply a corresponding Purchasing application processes																																																																					
<p>Requisition routed to agency Purchasing agent.</p>	<p>Ready for Purchasing</p>  <p>Department: BHS Req #: B0800018 Tracking #: 155 BFY: 2008 Need by: 01/14/2008 Req Notes <input type="checkbox"/> Req Atch <input type="checkbox"/> Description: Packs Status: Ready for Purchasing <input type="button" value="Approve"/> <input type="button" value="Unapprove"/> Total: \$ 160.00 <input type="checkbox"/> Show Vendor Info</p> <table border="1"> <thead> <tr> <th>Notes</th> <th>Atch</th> <th>Status</th> <th>Item #</th> <th>Description</th> <th>Qty</th> <th>U/M</th> <th>Price</th> <th>Sub Total</th> <th>Encumb</th> <th>Six</th> <th>Mod</th> <th>TC</th> <th>R</th> <th>PCA</th> <th>Index</th> <th>Sub Obj</th> <th>Dtl</th> <th>Grant</th> <th>Ph</th> <th>Project</th> <th>Ph BU</th> <th>Fund</th> </tr> </thead> <tbody> <tr> <td>Menu <input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Line Approval Complete A1</td> <td>Packs</td> <td>4</td> <td>Each</td> <td>\$60.00</td> <td>\$240.00</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>230</td> <td>10051</td> <td>1200</td> <td>5101</td> <td>1BURLY 08</td> <td>ARMOPS 08</td> <td>GVOA 0001</td> <td></td> </tr> <tr> <td>Menu <input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Line Approval Complete A2</td> <td>Packs</td> <td>2</td> <td>Each</td> <td>\$80.00</td> <td>\$160.00</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>230</td> <td>10051</td> <td>1200</td> <td>5101</td> <td>1BURLY 08</td> <td>ARMOPS 08</td> <td>GVOA 0001</td> <td></td> </tr> </tbody> </table>	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	Sub Total	Encumb	Six	Mod	TC	R	PCA	Index	Sub Obj	Dtl	Grant	Ph	Project	Ph BU	Fund	Menu <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Line Approval Complete A1	Packs	4	Each	\$60.00	\$240.00							230	10051	1200	5101	1BURLY 08	ARMOPS 08	GVOA 0001		Menu <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Line Approval Complete A2	Packs	2	Each	\$80.00	\$160.00							230	10051	1200	5101	1BURLY 08	ARMOPS 08	GVOA 0001	
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<p>Agency rule: May purchase without soliciting quotes if under \$5,000.</p>	<p>Create PO</p>  <p>Department: ~Select Department~ PO # <input type="button" value="New PO"/> <input type="button" value="Save"/> <input type="button" value="Print Preview"/> Vendor # <input type="button" value="State Contract"/> Required Delivery PO Options: None Vendor Notes <input type="checkbox"/> PO Atch <input type="checkbox"/> Status: New PO Total: \$0.00 PO Created PO Edited <input type="button" value="Delete PO"/> <input type="checkbox"/> Vendor Info <input type="checkbox"/> Coding Info <input type="checkbox"/> Receipt Info</p> <table border="1"> <thead> <tr> <th>Sel</th> <th>Req #</th> <th>Need By</th> <th>Notes</th> <th>Atch</th> <th>Status</th> <th>Item #</th> <th>Description</th> <th>Qty</th> <th>U/M</th> <th>Price</th> <th>Sub Total</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Menu D8000</td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Line Approval Complete</td> <td></td> <td>Wheel</td> <td>1</td> <td>Each</td> <td>80.00</td> <td>80.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Menu D8000</td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Line Approval Complete</td> <td></td> <td>Wheel</td> <td>1</td> <td>Each</td> <td>80.00</td> <td>80.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Menu D8000</td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Line Approval Complete</td> <td></td> <td>Wheel</td> <td>1</td> <td>Each</td> <td>80.00</td> <td>80.00</td> </tr> </tbody> </table>	Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M	Price	Sub Total	<input type="checkbox"/>	Menu D8000		<input type="checkbox"/>	<input type="checkbox"/>	Line Approval Complete		Wheel	1	Each	80.00	80.00	<input type="checkbox"/>	Menu D8000		<input type="checkbox"/>	<input type="checkbox"/>	Line Approval Complete		Wheel	1	Each	80.00	80.00	<input type="checkbox"/>	Menu D8000		<input type="checkbox"/>	<input type="checkbox"/>	Line Approval Complete		Wheel	1	Each	80.00	80.00																					
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<p>Agency rule: If the purchase is estimated to go over \$50,000 requisition must be routed to Dept of Administration, Division of Purchasing.</p>	<p>Administrator can define Delegated Amount</p> <p><input type="checkbox"/> Email Notification Delegated Amount \$ 5000.00 <input type="checkbox"/> Restrict Req Approver PO Pct Variance 0 <input checked="" type="checkbox"/> Restrict Approval by Req Department <input type="button" value="Update"/></p>																																																																					

Example of existing Agency Processes	To apply a corresponding Purchasing application processes														
<p>Agency rule: Purchases between \$5,000 to \$50,000 must be sent to three vendors with a significant Idaho presence. Quotes are informal.</p>	<p>n/a</p>														
<p>Quotes are submitted, tallied, and the lowest responsible vendor awarded the purchase.</p>	<p>State Contract numbers can be tracked on the PO.</p> <p>See 'Create PO' above</p> <p>Scanned documents from vendors can be attached to the PO</p>  <p>The screenshot shows a web-based purchasing application. At the top, there are tabs for 'PO Status', 'Req Status', 'Requisition', 'Assign', 'PO', and 'Reports'. Below the tabs, there are fields for 'Department' (WKP: Worker PO) and 'PO #' (WKP80004). There are buttons for 'New PO', 'Save', and 'Print Preview'. A 'Vendor #' field is present. There are checkboxes for 'Required Delivery', 'PCard Purchase', 'Vendor Notes', and 'PO Atch' (circled in red). The status is 'In Purchasing'. A table below shows a list of items with columns: Sel, Reg #, Need By, Notes, Atch, Status, Item #, Description, Qty, U/M, Price, SubTotal. The first item is 'Assigned to PO xy7823-aa Business cards' with a quantity of 1 and a price of 15.00.</p>														
<p>Purchase order is generated and faxed or e-mailed to vendor.</p>	<p>Print PO in PDF format.</p>  <p>The screenshot shows a printed purchase order document. At the top, it says 'Agency : 140 State Controller' with the address '800 W. Main Street Sun Valley Id 83566' and phone/fax numbers. Below that, it says 'Purchase Order WKP80023'. There are fields for 'Purchasing Agent' (JAMES CARTER) and 'Supplier' (ELECTRICAL SPECIALISTS). A table below shows the following ship and bill to information for 'Fuel Cells'.</p> <table border="1"> <thead> <tr> <th>Item No</th> <th>Quantity</th> <th>U/M</th> <th>Attachment</th> <th>Price</th> <th>Freight</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>456321</td> <td>1</td> <td>Each</td> <td></td> <td>5,000.00</td> <td>0.00</td> <td>\$5,000.00</td> </tr> </tbody> </table>	Item No	Quantity	U/M	Attachment	Price	Freight	Amount	456321	1	Each		5,000.00	0.00	\$5,000.00
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456321	1	Each		5,000.00	0.00	\$5,000.00									

Example of existing Agency Processes	To apply a corresponding Purchasing application processes
Vendor receives PO and processes order.	n/a
Vendor ships order to agency (usually an FOB Destination).	<p>Shipping Addresses maintained by administrator within the application</p> 
Shipment arrives at agency.	Receiving
Item(s) is inspected to see if it meets specifications and the terms and conditions of the purchase order.	
Item(s) inventoried.	n/a

Example of existing Agency Processes	To apply a corresponding Purchasing application processes
<p>Invoice received and sent to fiscal officer to approve and process payment.</p>	<p>POs can be imported in Payment Services</p>  <p>The screenshot shows the 'Payment Services' interface with a 'Purchase Order Look Up' section. It includes a search field for PO # (BH080002), 'Find' and 'Import' buttons, and a table of items. The table has columns for Sel, Status, Item No, Description, Qty, U/M, Price, and SubTotal. Two items are listed: 'Menu Received' (Sand Bags) and 'Menu Received' (MPC Laptop #456, quote 8909).</p>
<p>Vendor issued a warrant or EFT.</p>	<p>Payment Services uploads to STARS</p>
<p>Copy of Requisition, P.O., Inventory Record, and Invoice to file. Agency rule: File to be kept for 3 years retention.</p>	<p>Reports can be generated in PDF, and printed or saved.</p>  <p>The screenshot shows a navigation menu with tabs for Status, Requisition, Approval, and Reports. Under the Reports tab, there are several report options: Purchasing Report, Encumbrance Report, User Report, Audit Report, Grant Report, and DOP Delegated Report, Project Report.</p>