

## **Purchasing Workflow 6.0A**

Purchasing Workflow provides a sophisticated workflow engine with configurable rules, routing and approval functions. An easy-to-use requisition interface creates documents that are controlled through the workflow process. Purchasing Workflow enables organisations to tightly control & manage their procurement system.

### **Requisitioning Features**

Purchasing Workflow provides a simple and efficient requisitioning interface; setup options are available to optimise or restrict the interface depending on configurable user roles or specific user settings.

- Ability to default all information (other than item number and quantity), including vendor, GL code and cost
- Handling of stock and non-stock items
- Templates can be used to load a list of standard items
- Allows different vendors on different lines
- Vendor selection is controlled at the item and user level
- Ability for the requisitioner to review each document's progress through the workflow
- Integrated with PJC, allows Job Related requisitions to be entered

### **Vendor Catalogue Functionality**

A Purchasing Workflow includes Vendor Catalogues which provide a set of rich enhancements for purchasing operations including:

- Pricing effective dates
- Quantity breaks
- Vendor item numbers and Lead times
- Minimum & incremental order quantities
- Automated vendor selection methodologies
- Vendor item images, accessible from the requisition interface

### **Workflow Engine**

Unlimited workflows can be designed to handle different requisitioning requirements. The workflow engine centrally manages each requisition based on a collection of rules and routing decisions:

- Document value and Authority Level values
- A documents contents, for example, the presence of capital items or non-stock items
- Date based User substitutions
- Support of multiple authorisations on a single transaction
- Event Log of all workflow & approval events

Once a requisition document is fully approved, the workflow engine can further process the document in several different ways - create PO, pool & consolidate PO's, or use Internal Issues to fulfil requisitions directly from an inventory store.

### **Workflow Management**

Purchasing Workflow provides the ability to monitor and manage documents that are either within or have completed the workflow process:

- Approval Console, to present and collect approvals from individual users
- Management Console, allows managers to review documents currently in the workflow process for their assigned cost-centres
- Ability to escalate overdue user approvals

## Cost Centres

Cost Centres are a pivotal feature in Purchasing Workflow providing the organisational purchasing structure, management and GL segment override settings.

## User Configuration / Security

At the time of Requisition or Purchase Order the user can select from their restricted list of Cost Centres and Workflows that determine the handling of the source document.

## Notification Engine

A critical component of Purchasing Workflow is the Notification Engine which delivers timely information to parties involved in the requisition / approval process. Source documents can be attached to notification emails.

## Availability & System Requirements

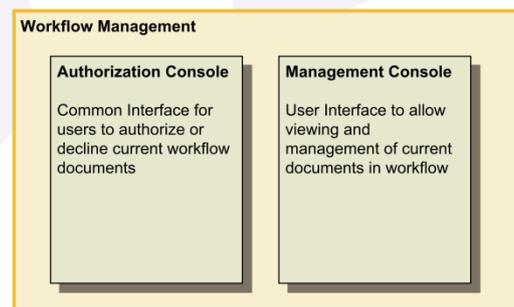
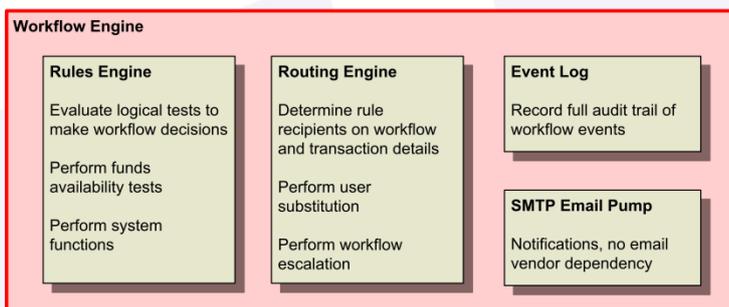
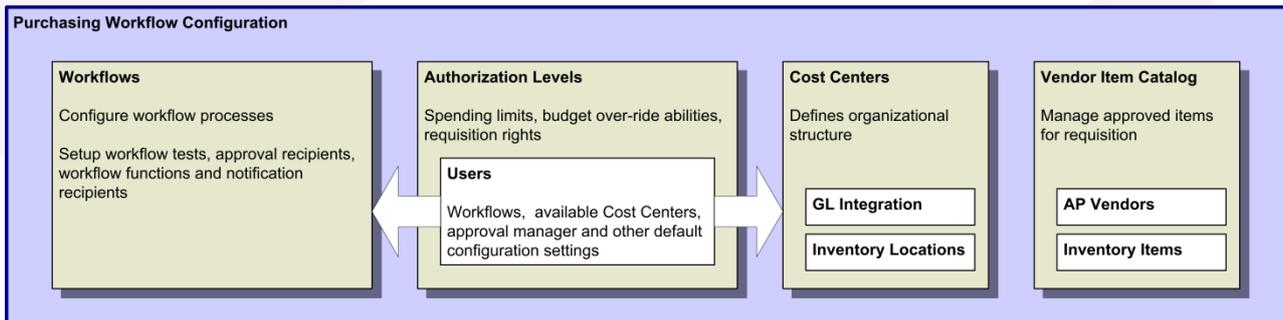
ERP Series: 100, 200 & 500  
Databases: Microsoft SQL Server, Oracle & Pervasive  
Web Deployable: Yes

Required Modules:

- General Ledger
- Accounts Payable
- Purchase Orders

Integrated Modules (optional):

- Inventory Control
- Project & Job Costing
- Internal Issues (by PTS)
- Funds Availability (by PTS)
- Workflow Documents (by PTS)



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