

Purchasing Workflow 5.4A

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 Catalogues

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

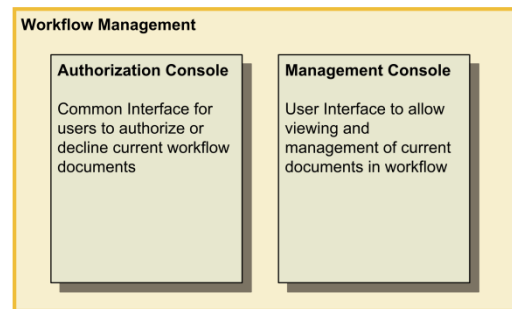
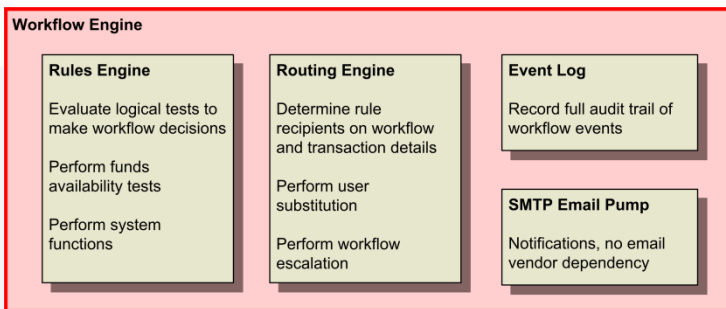
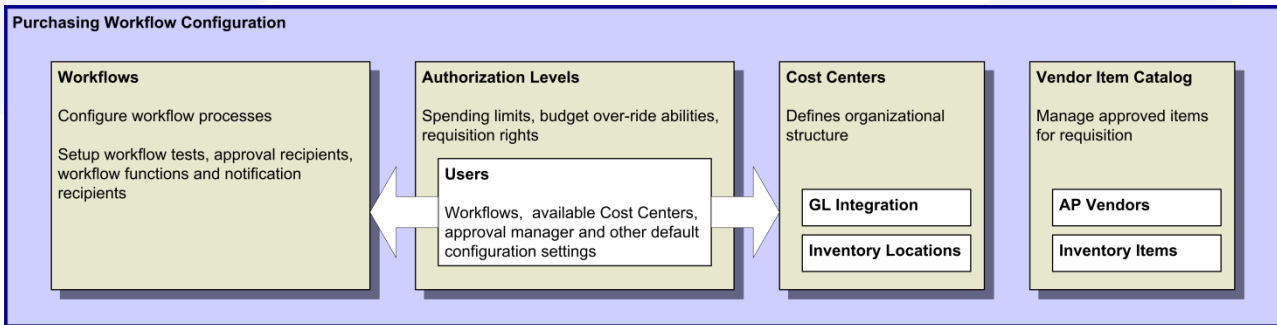
Editions: 100, 200 & 500
 Databases: IBM DB2, Oracle, Pervasive & Microsoft SQL Server
 Web Deployable: Yes

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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