Purchasing Workflow 6.3A

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 view the status/progress of a document through the workflow
- Integrated with PJC, allowing Job Related requisitions to be entered

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 automatically attached to notification emails.

The Notification Engine supports major email platforms including GMail, Office 365, Exchange, Lotus Notes and GroupWise.

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.

Substitutions

The substitution facility allows users to nominate another user to carry out their approvals while they are on leave.
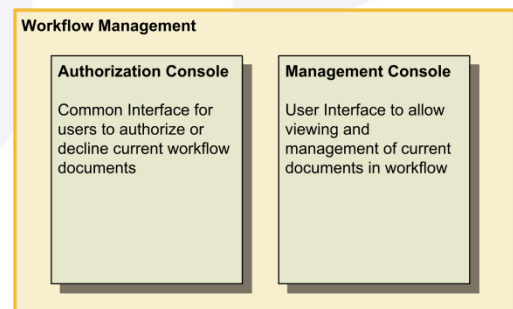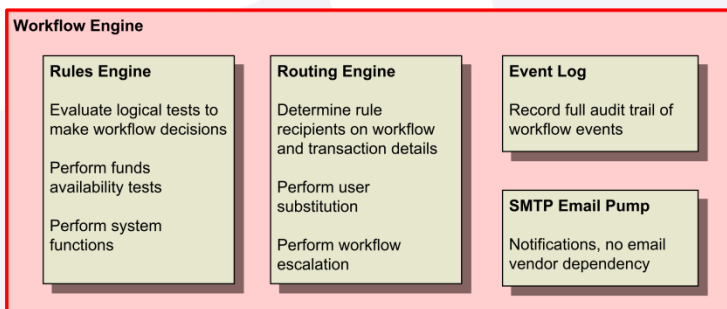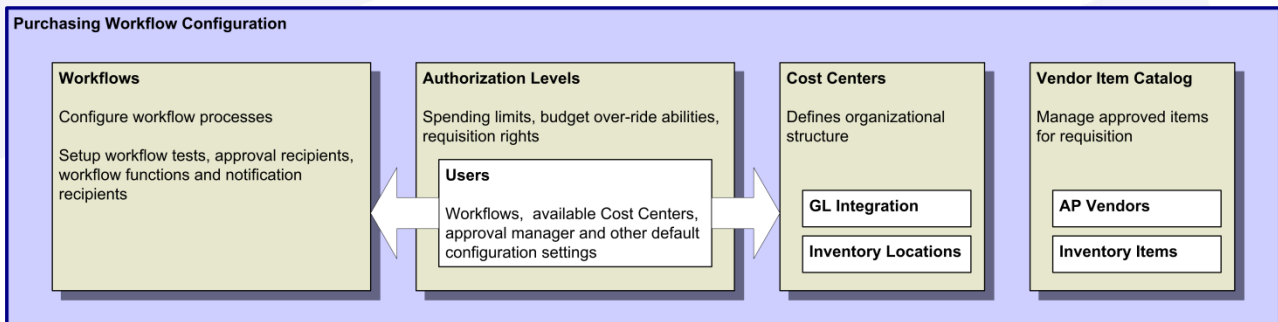
Availability & System Requirements

300 Editions: Standard, Advanced & Premium
Database: Microsoft SQL Server
Languages: English, Spanish, French & Simplified Chinese

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)
- Vendor Catalogs (by PTS)

Purchasing Workflow Configuration

Workflows

Configure workflow processes

Setup workflow tests, approval recipients, workflow functions and notification recipients

Authorization Levels

Spending limits, budget over-ride abilities, requisition rights

Users

Workflows, available Cost Centers, approval manager and other default configuration settings

Cost Centers

Defines organizational structure

GL Integration

Inventory Locations

Vendor Item Catalog

Manage approved items for requisition

AP Vendors

Inventory Items

Workflow Engine

Rules Engine

Evaluate logical tests to make workflow decisions

Perform funds availability tests

Perform system functions

Routing Engine

Determine rule recipients on workflow and transaction details

Perform user substitution

Perform workflow escalation

Event Log

Record full audit trail of workflow events

SMTP Email Pump

Notifications, no email vendor dependency

Workflow Management

Authorization Console

Common Interface for users to authorize or decline current workflow documents

Management Console

User Interface to allow viewing and management of current documents in workflow

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