



Online Purchase Requisition Workflow



Central Washington University

LEARN. DO. LIVE.



iCAT Online Purchase Requisition Project Facts:

Project Start: April 1, 2013 Project Go-Live: July 9, 2013

Training Starting July 16th and Continues to October 31st

After October 31st, all purchase requisitions will be entered online.



iCAT

Project Scope:



Transition the current *paper-based* requisition process to a more efficient and simplified electronic process.

We implemented the **PeopleSoft eProcurement** module during our project.

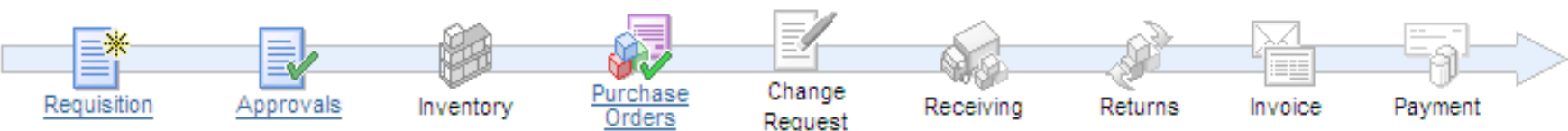
- *It is a web-based solution that automates and controls purchasing.*
- *Streamlines pages and has powerful search capabilities to guide requesters through the procurement steps.*
- *Eliminates the need to route and track paper requisitions.*

iCAT - Summary of Overall Benefits

- Streamline requisition approval process
- Dramatic reduction of processing time
- Ability to encumber purchasing transactions
- Improve data integrity
- Ability to see the status of a requisition from entry in the system through payment

Requester: Martha Diemer: Cedar Sec Admin Entered By: Karen L Galbraith Priority: Medium

Request Lifespan:



The flowchart illustrates the request lifecycle with icons for each stage: Requisition (document with star), Approvals (document with checkmark), Inventory (warehouse), Purchase Orders (document with checkmark), Change Request (document with pencil), Receiving (truck), Returns (truck with arrow), Invoice (envelope), and Payment (document with coin).

Line Information							
Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	Installation of furniture	PO Created	500.00000	USD	1.0000	EA	SHAW'S FURNITURE & APPLIANCE



iCAT Benefits to Requestors

- ✓ Requestors can create requisitions on behalf of other requestors
- ✓ “At-A-Glance” view of requisition status
- ✓ Use of catalogs (list of commodity code) to assist with completing requisition
- ✓ More efficient/faster processing
- ✓ Create requisitions using “*favorites*”
- ✓ Ability to electronically attach supporting documentation (sole source, vendor quotes, etc.)



iCAT Benefits to Department Administration

- ✓ **Greater visibility into the procurement process**
- ✓ **Email notifications sent with links to approval page**
- ✓ **No paper requisitions to file**
- ✓ **Improved capture of required authorizations**



iCAT

Increased Efficiencies in the Purchasing Department

- ✓ **INCREASED CUSTOMER SERVICE**
- ✓ **Better contract compliance**
- ✓ **Ability to use new electronic catalogs built with NIGP codes for mandated reporting**
- ✓ **Less paper in office to track and file and less data entry**
- ✓ **Processing efficiencies**

 **iCAT – Positive Comments from Our Focus Groups**

“Good to see where the Requisition and PO is in the process instead of having to phone to follow-up or look it up on the Purchasing Requisition Log.”

“I welcome automating the process. Now it’s online.”

“It will save time in my area from printing and tracking down signatures.”

“It seems easier and faster than the current paper trail.”

“It will be much quicker to get approvals and track reqs.”

“It will make the process more organized and centralized.”

“Like the speed of finding the information such as req, Purchase Order and who will need to approve.”

“Eliminating paper and automating/streamlining the process.”