



PM Purchase Requests and Electronic Requisition Approval

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Agenda



- Purchase Request Overview
- Electronic Requisition Approval Introduction
- eReq Demo
- Questions



Purchase Requests



- New Procurement Mgmt object (7.7 PTF/7.8)
- Ties together requisitions
 - Like a header
 - Handle requisitions as a group
 - Makes entering and tracking requisitions easier

Purchase Request			
Buyer: John Doe Priority: 1			
Whs:	Atlanta	Contract: 123	
REQ	ITEM	QTY	DATE
1	123A	10	Apr 1
2	2546	44	Apr 8
3	5938	48	Apr 8
4	2019	14	Apr 1
5	3876	87	Apr 6

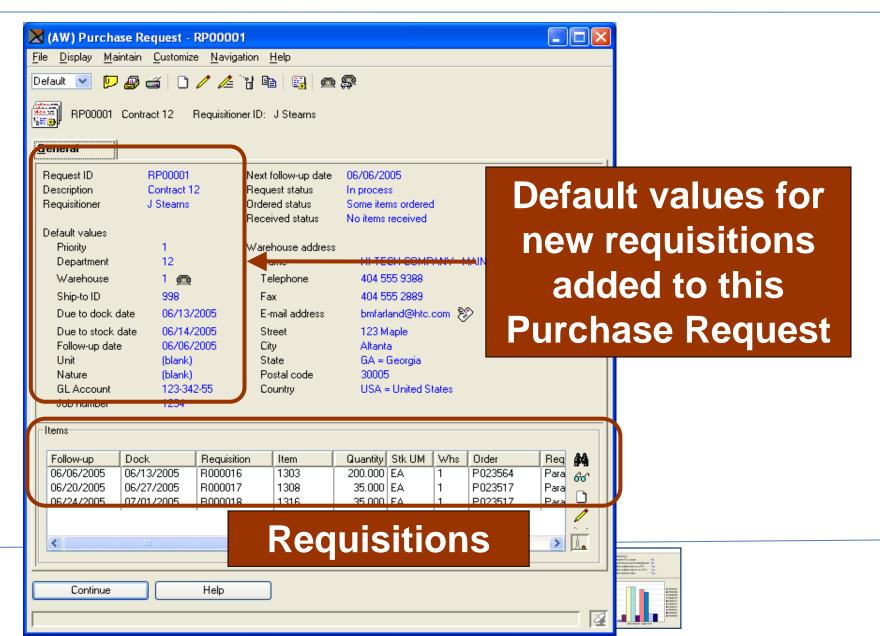






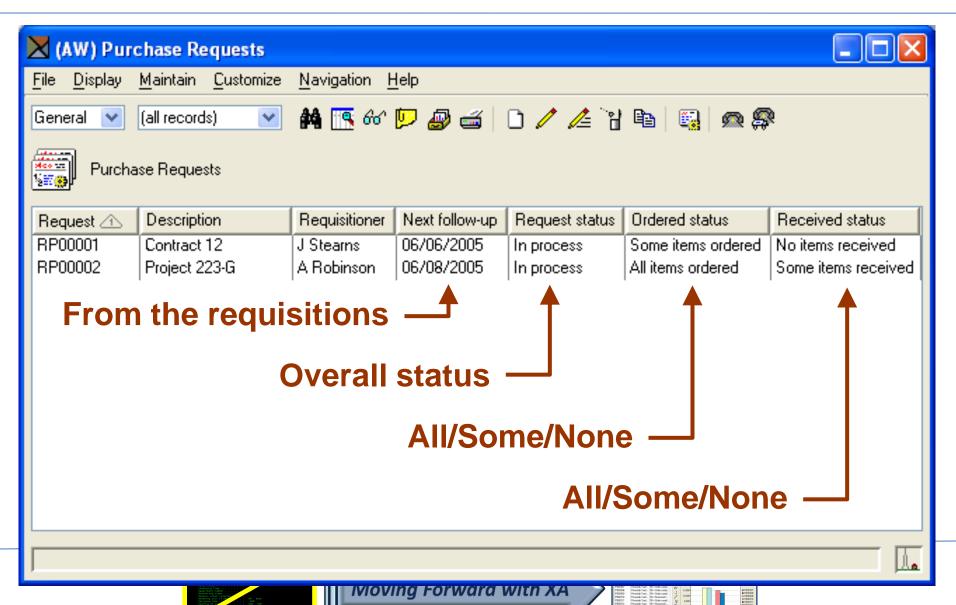
Purchase Request Header





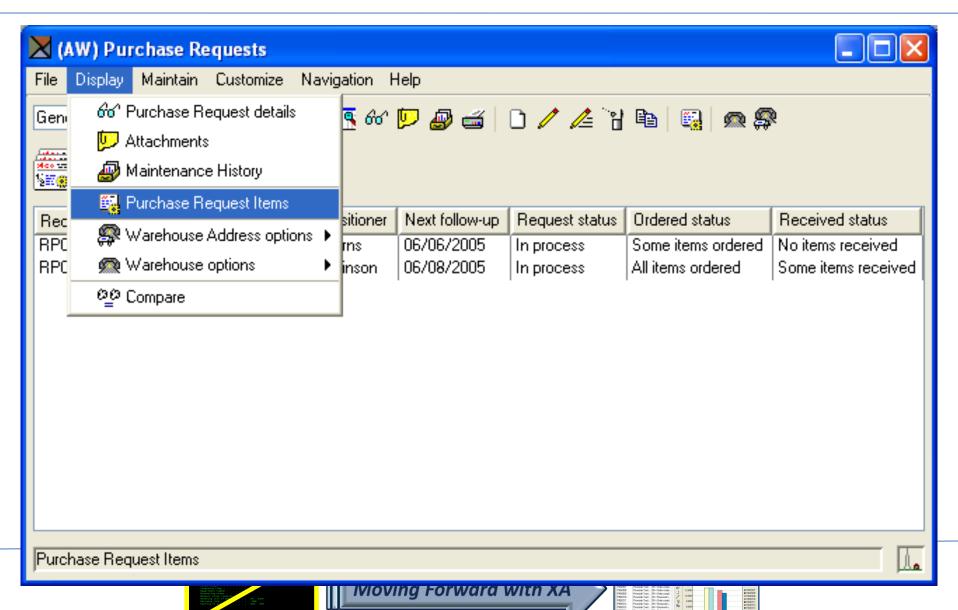
Purchase Request Status





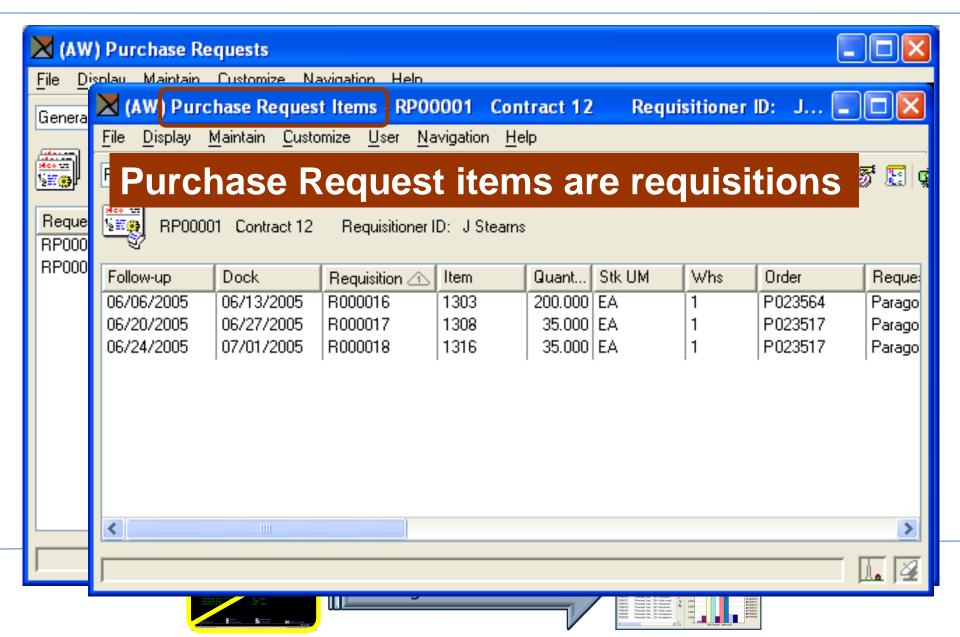
Purchase Requests





Requisitions





Purchase Request Benefits



- Purchase Request is for the requisitioner, not the buyer
 - No change to buyer's process
- Manage and track requisitions as a group
 - For order, job, contract
- Quick glance shows status
 - Drill-down to see more



Electronic Requisition Approval-eREQ



- Electronically route requisitions for approval
- Approval via PowerLink or email
- Multiple levels of approval
- Multiple categories of items
 - Inventory, non-inventory, capital
- Complete history of transaction





eReq Demonstration

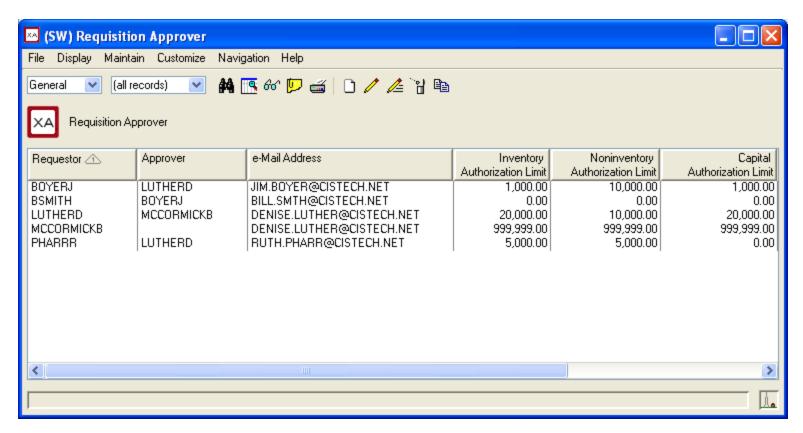






Requestor/Approvers



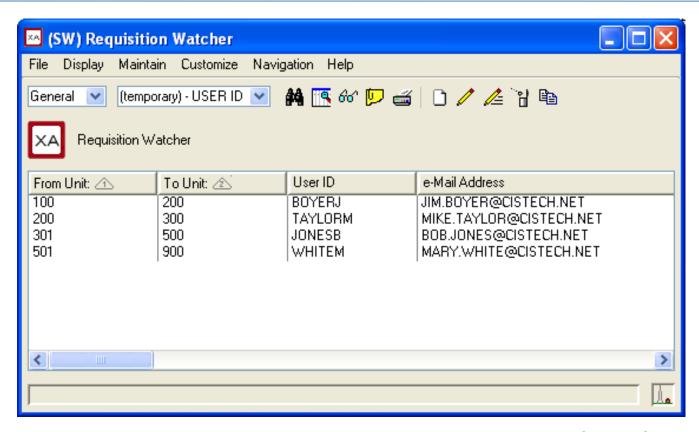


- Set Limits by Type
 - Inventory, Non-Inventory and Capital Projects



Watchers



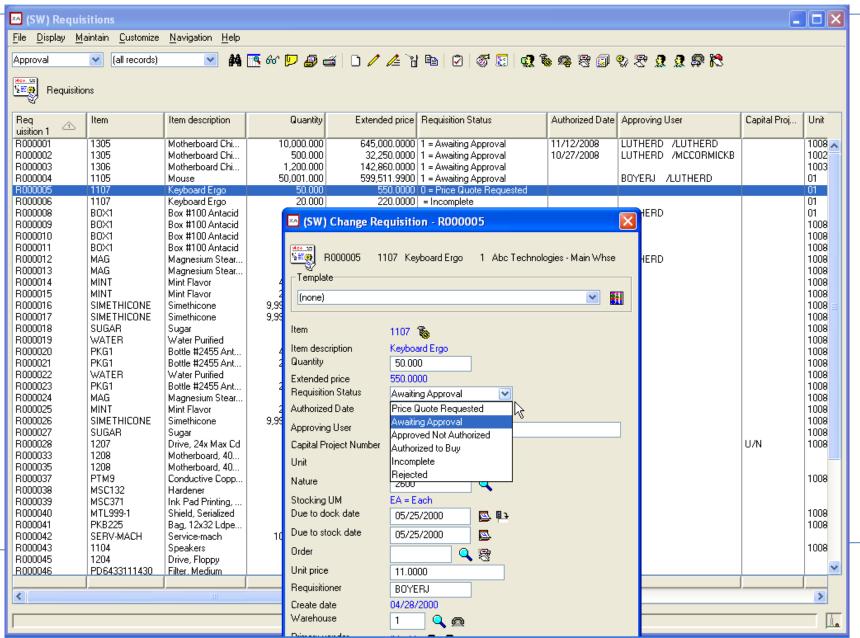


Receive authorization notification for Dept (Unit) Range



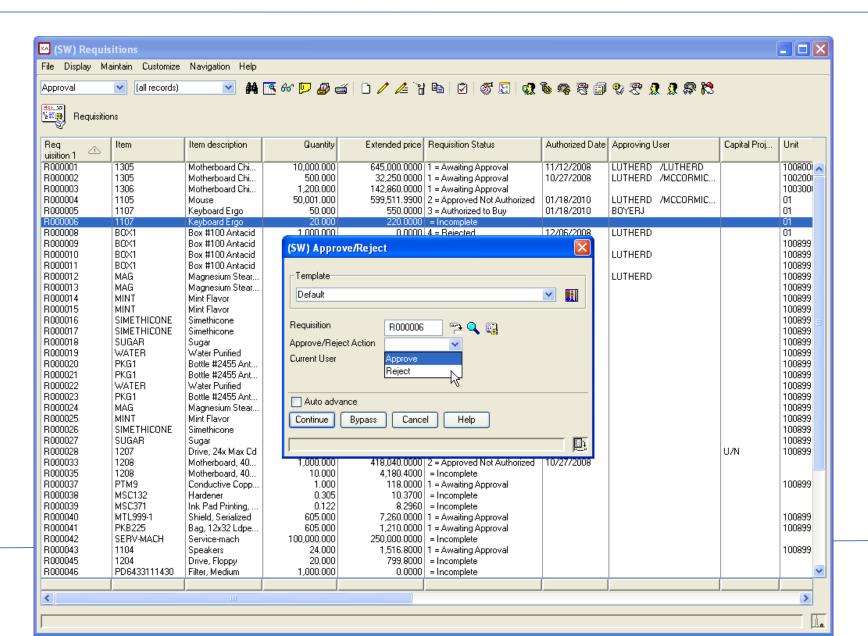
Requestor initiates approval





Approve from PowerLink





Approve from email



Cistech Support [CISTECHSUPPORT@CISTECH.NET] From: Too Denise Luther Co Subject: REQUISITION REQUEST R000217 Requistioner: LUTHERD has requested the purchase of Item: 1002 PC, 266 MH2, DESKTOP Quantity: 7 Extended Price: \$7,000.00 The item will be charged to Department Unit: 100 Pack Department Accounting Nature: 2600 Invoice Clearing Please review the requisition and approve or reject. If you are cc'd on this e-mail, this will impact your budget and you are being provided with this for informational purposes only. Please contact the requisitioner directly if you do not agree with this purchase.

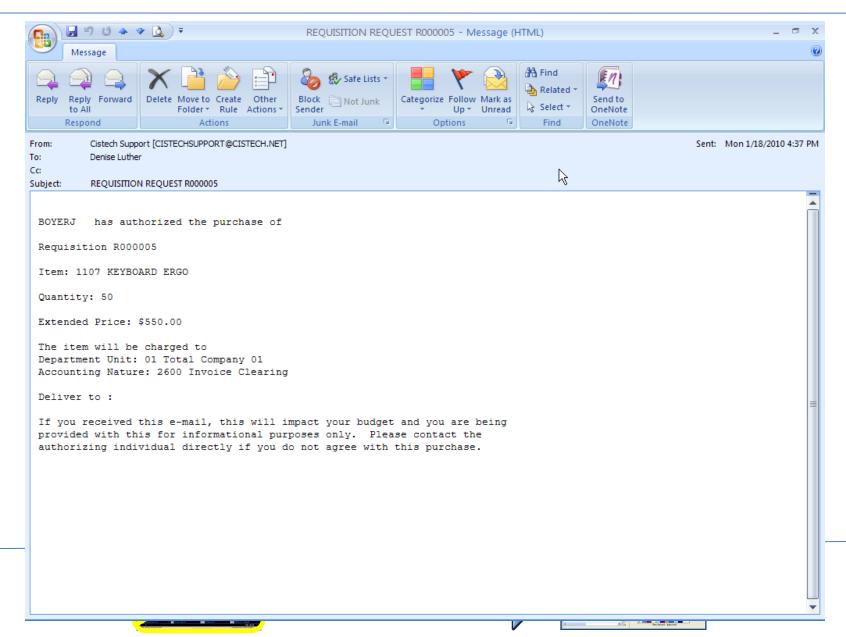


Moving Forward with XA



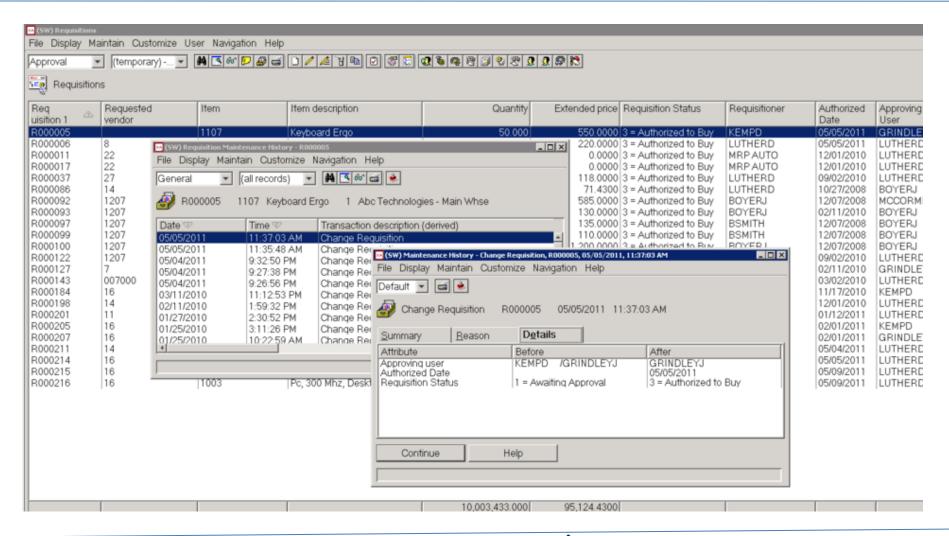
Watchers are notified





Maintenance History







E-Req Benefits



- Increased efficiency of requisition process
- Increase timeliness of process
 - Get needed parts quickly, without expediting
- Increased visibility of status
- Increase control of requisitions cost







E-Req Implementation



- Software price: \$5,500
- One day of remote installation and education support
- Two days of optional on site implementation support
- XA R7.7
- Procurement Management
- Integrator
- Http server with email integration









Questions? Thank you!

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