

# SCC Purchasing Processes

## Original Purchase Order:

1. A department needs goods or services.
  - a. < \$1500 - user may enter a purchase request.
  - b. \$1500 - \$6500 - Requires 3 quotes or a sole source.
  - c. > \$6500 Purchasing will get the quotes or review quotes that the requester has received.
  - d. If a Cal-Card is used, it bypasses the purchasing system. It is first entered into the system in AP.
2. Department enters a purchase request (PR).
3. The department scans and attaches required backup documents.
4. The PR goes through online department approvals using workflow.
5. The PR is routed by workflow to either Purchasing or the CAO, depending on the amount.
6. If the PR is routed to the CAO first, it will then route to Purchasing for approval.
7. Purchasing approves the PR (They may also return it for correction or deny it.)
8. The system will "print" the PR to file via workflow rules.
9. The system automatically converts the PR to a PO.
10. The system automatically emails the PO to the vendor or notifies purchasing if a valid email address does not exist for the vendor.
11. The system generates an encumbrance transaction.
12. The PO is now ready for extraction to Accounts Payable processing when needed.

## Changed Purchase Order:

1. Department enters a new PR (refer to Purchasing End User Guide) to change an existing PO. The necessary changes will be entered in the item description field and the PO number (the number of the existing PO being changed) will be entered in the Project ID field (POUPPR Misc. tab). The changes are typically one of the following:
  - a. Increase amount
  - b. Decrease amount
  - c. Add or remove items
2. The change order PR goes through department approvals via workflow.
3. The change order PR is then routed by workflow to either Purchasing or the CAO.
4. If the changed PO is routed to the CAO first, it will then route to Purchasing.
5. Purchasing approves the change order PR, which is now linked to the existing PO or returns the change order PR to the department for revisions or deletes it.
6. If approved, Purchasing "prints" the PO to file.
7. The changed PO may be emailed to the vendor.
8. The system generates an encumbrance adjustment.