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ASCENDER - Purchasing Requisition Process

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The Purchasing application provides LEAs with an easy and paperless method to create requisitions and purchase orders. LEAs can set up a variety of purchasing options and permissions such as spending minimums and maximums, account permissions, workflows, and approver email notifications to assist in managing an efficient purchasing process. Additionally, users can print purchase orders (for internal use and for vendor purposes) and email purchase orders to vendors who have an email address on file.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA’s process.

Before You Begin

Before you begin:

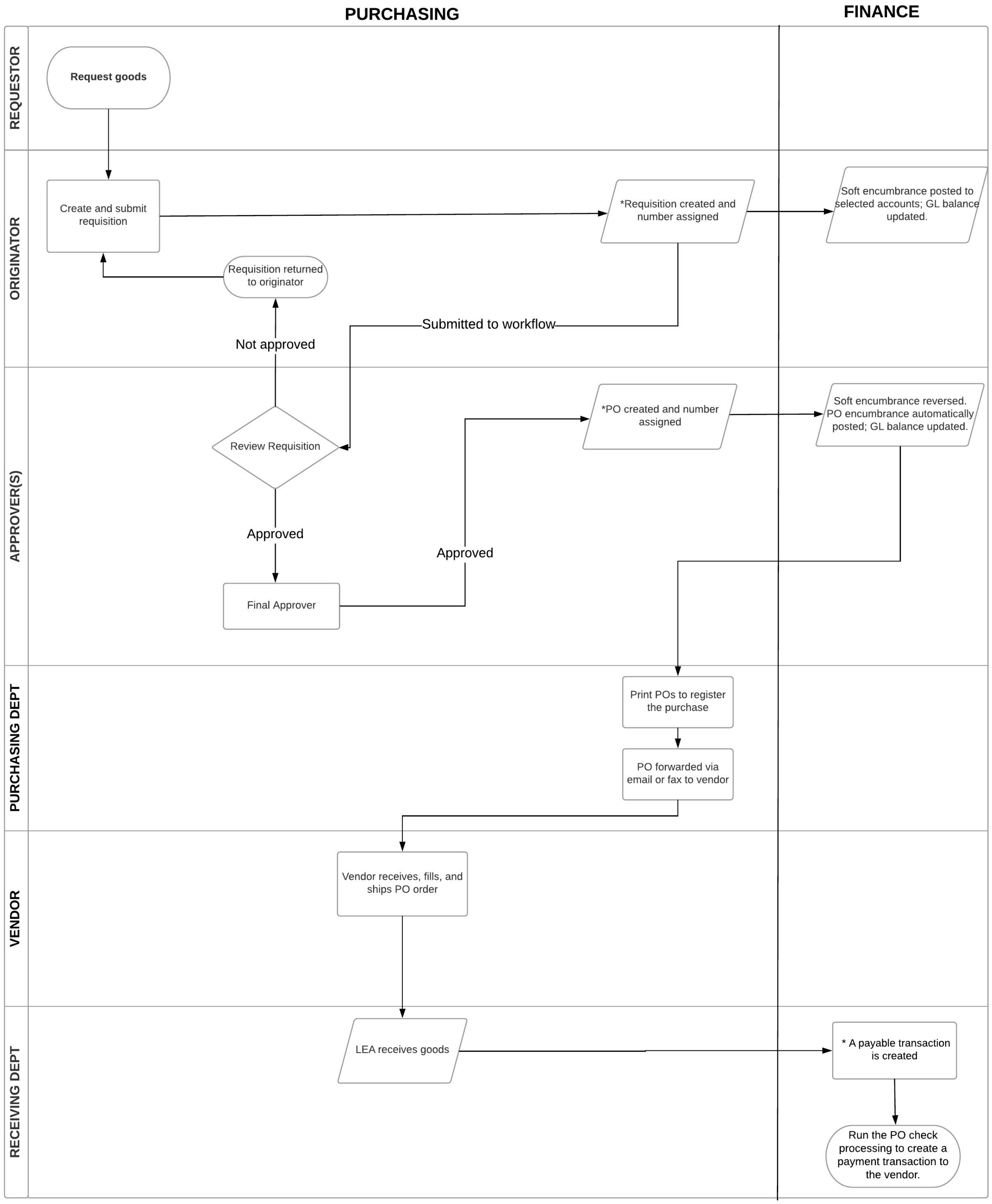
Terms:

The following terms are used throughout the Purchasing Requisition processing steps.

Term	**Description**
Approver	Any individual in the approval path who has permission to approve a submitted requisition.
Commodity Code	A standard classification code for products and services used to detail where funds are expended.
CYR	Current year
Encumbrance	Funds that are reserved in the selected accounts when a requisition is finalized and encumbered. For each requisition transaction, a soft encumbrance is posted to the selected account numbers and the general ledger balance is immediately updated in Finance via an automated journal voucher entry. Once the requisition is approved, the soft encumbrance is reversed and the purchase order encumbrance is automatically posted.
Final Approver	The last individual in an approval path to approve a submitted requisition, in turn, converting it to a purchase order.
First Approver	The first individual at each campus/department to approve a submitted requisition.
NYR	Next year

Term	Description
Originator	The individual who is entering the requisition in ASCENDER. The originator can be the same as the requestor.
Purchase Order	A fully approved requisition that creates an encumbrance to 4310.00. Also, referred to as a PO.
Requestor	The individual who is requesting to purchase the goods or services.
Requisition	A request entered in ASCENDER for the purchase of goods. A requisition transaction creates a soft encumbrance to 4310.01.

Basic Purchasing Requisition Flowchart


PURCHASING
FINANCE
REQUESTOR
ORIGINATOR
APPROVER(S)
PURCHASING DEPT
VENDOR
RECEIVING DEPT
Request goods
Create and submit requisition
*Requisition created and number assigned
Soft encumbrance posted to selected accounts; GL balance updated.
Requisition returned to originator
Submitted to workflow
Not approved
Review Requisition
Approved
Final Approver
Approved
*PO created and number assigned
Soft encumbrance reversed. PO encumbrance automatically posted; GL balance updated.
Print POs to register the purchase
PO forwarded via email or fax to vendor
Vendor receives, fills, and ships PO order
LEA receives goods
* A payable transaction is created
Run the PO check processing to create a payment transaction to the vendor.

*If applicable auto settings are selected in ASCENDER.

Considerations:

Consider the below items prior to setting up the purchasing options:

- If your LEA plans to use the Receiving feature, do you want to automatically create payables on the Finance > Maintenance > Pending Payables page?
- Do you have a cutoff date for submitting requisitions? How often are Finance checks run?
- Are you going to use the automatic requisition and PO number assignment feature?
- How are attachments handled?
- If using the workflow feature, who is going to be included in the approval path (first approver? final approver?)
- Do you have a central receiving address or multiple locations? How are received items logged?
- After the final approval of a purchase order, how many PO copies should be printed?
- Are you creating long-term purchase orders for utilities, maintenance, janitorial supplies, etc. with partial pay; purchase authorizations submitted as needed?
- Are you submitting paper requisitions? If so, who is the designated entry person?
- At what point do you plan to enter account codes?
- Do you plan on submitting a purchase order for student and staff travel (hotels, meals, etc.)?
- Do you plan on using commodity codes to group “like-types” of items and track those items/purchases in the Purchasing and Warehouse applications? If so, refer to the ASCENDER - Using Commodity Codes guide for more information.
- Are your employees active in Personnel and Payroll? Originators and Approvers must be active in both applications.

Purchasing Requisition Process

The following guides provide the necessary steps to begin using the requisition feature to purchase goods in the Purchasing application.

- ASCENDER - Set up Purchasing Options and Permissions
- ASCENDER - Manage Purchasing Approval Workflows
- ASCENDER - Perform Requisition Maintenance
- ASCENDER - Approve and Receive Purchase Orders