Finance and Supply Chain Management

Creating a Requisition, Purchasing Supplies, Processing Payment

- Requisitioning/purchasing supplies follows other successful online ordering models

- A single requisition can be created for supplies from either internal stores or an external vendor

- For an internal order, the system will auto create a purchase order

- For an external order, the requisition is sent to a buyer to create a purchase order (PO) within the system

- Creating a requisition initiates a chain of events including triggering a notification requesting approval

- Creating a requisition triggers a notification requesting approval, and another notification as to whether it has been approved or denied; if denied, reasons why must be entered by approver or purchasing agent

- There is the flexibility to enter notes with specific instructions and a record of the transaction is housed for future reference

- Shopping for the product has been made easier by having provincial standardized Stock Keeping Units (SKUs)

- You will be able to create a "favourites" list for frequently ordered items to eliminate the need to search every time an order is placed

Finance

- The approval process is contained within the system to reduce the potential for paper to be misdirected or lost

- After the invoice has been reconciled to the purchase order, then payment proceeds

- Staff can check at what stage the requisition, purchase order or invoice is, at any time

Supply Chain Management Q and As

Q: Who places the order for supplies from an outside vendor?

A: There are two types of orders: those that can be filled internally and those that come from external vendors. Some orders may require your manager's approval, while others may require the involvement of the purchasing department. If a requisition contains a request for supplies that include both an internal and external source, the system will automatically direct the orders to the appropriate department.

Q: Will there be pictures of the items for ordering?

A: Photographs of the supplies are not available at this time.

Q: Will purchase orders be saved where they are in the process, or is it necessary to save PDF's to my computer to maintain this information?

A: A history of previous purchase orders will be maintained within the system including where an order is in the process, from pending approval to supply received.

Q: Will we have the same account names/numbers to use as they are now?

A: There will be changes to account numbers/names.

Q: Can you enter multiple pay codes on one requisition? Can I code each item separately if needed?

A: Multiple cost centres can be used on a single requisition as long as they are all from the same facility. If the cost centres belong to departments in separate facilities, multiple requisitions will need to be created.

Q: Can our favourite list be transferred from our current procurement site or can we create a favourite list?

A: A list can be kept in the new system; however, there is no capability to transfer this information automatically from an existing system and will need to be manually entered. To assist in this transition, the AIMS team will be generating reports of each areas' favourite supplies to make it easier to input this information into the new system