Purchasing/Receiving Process in the iProcurement System

Once a requisition has been completed, the order is routed for approval via an electronic approval process. The approval path is built upon the approval limits assigned to the requester (person who enters requisitions in iProcurement). However, when an individual acts as "preparer" by requisitioning on behalf of the requester, then the preparer must change the first approver listed to the requester's name, so that the requester's approval chain is followed and not the preparer's. Note: Any requisition in excess of $2,499 that is being charged to a grant (PTAEO) is automatically routed to the Office of Sponsored Projects for approval.

Once a requisition has been approved, the requester, or the preparer as the case may be, receives a notification that the requisition has been approved through the workflow hierarchy. This notification serves as confirmation that a purchase order (PO) has been issued in the iProcurement system and that the item(s) can now be ordered. If the preparer entered the requisition on behalf of the requester, then the preparer will need to notify the requester of the PO number for use in placing the order. Note: When placing orders, requesters should remind vendors to forward invoices directly to Accounts Payable (AP) for payment.

All orders that are less than $2,500 do not require online receiving. Once an invoice is received in AP and matched to the purchase order, it will be paid. All orders equal to or greater than $2,500 require online receiving. The requester will need to confirm the delivery of their order by recording receipt of the item(s) in the Oracle iProcurement system. An online receipt is an indicator to AP that the item(s) have been delivered, and that once an invoice is received in AP and matched to the purchase order, it is "OK to Pay." Note: Any invoice in excess of $24,999 requires an original invoice by AP. The invoice must also be approved in writing by an exempt employee who has fiscal responsibilities at the College.

If AP receives an invoice that is greater than $2,499 and matches it to a purchase order, but the order has not received in the iProcurement system, then AP will put the invoice on hold. The requester will then receive a notification that an invoice is on hold in AP, because the amount of the PO is over $2,499, but a receipt has not been recorded in the iProcurement system. The receipt of the item(s) must be recorded in system before the vendor can be paid. In addition, it is up to the requester not to record a receipt in the system until they are satisfied with their delivery.

It is AP's policy to enter invoices into the iProcurement system as they are received in their office. Although this would not prevent a check from being cut without the appropriate approval once a receipt has been recorded in the system, it would prevent the check from being signed and mailed.

Since AP will no longer be providing copies of paper invoices, it is very important for the requester to maintain a copy of the packing slip, bill of lading, or shipping memo that accompanies the delivery of the purchased item(s).