UCSD Marketplace — PO Workflow

Step 12: BUS-43 Compliance
- PO > $50K
  - POs over 50K require a Bid Review process to be completed by a Buyer
  - Review Completed? (CF Flag)

Step 11: Forms Approval
- Form with Assigned Approver?
  - Yes
    - Approve

Step 10: PO Create
- PO Created From Step 10
  - Purchase Order Created

Step 12: BUS-43 Compliance?
- BUS-43 Compliance?
  - Yes
  - Form Approver 1 - N

Step 12: Rad / Non-Rad Handling
- PO include[s] Rad & Non-Rad Item
  - Yes
    - Approve

Step 13: PO Create
- PO includesRad & Non-Rad Handling
  - Yes
    - Approve

Step 14: Send PO to Supplier
- PO Export settings triggered
  - No
  - Export PO to Internal Supplier

Step 15: PO Export to Internal Suppliers
- Yes
  - PO Documents distributed to Internal UCSD Suppliers via cxml, settings and triggers defined in Org Setup.

Step 16: Inventorial Equipment
- Equipment?
  - Yes
    - Approve

Step 17: Receipts Notification
- PO require 3-way matching?
  - Yes
    - Trigger Receipt Required Warning Message

Step 18: Send PO to IFIS
- Purchase Order Exported to IFIS
  - Exports all PO Documents to our ERP system, IFIS.

Account Code List for Step 14:
- 649000-Inventorial Equipment
- 649035-Equipment-Improved
- 649045-Equipment-Replacement
- 649091-Accessories To Inv Equipment
- 649900-Equipment Purchases-Computing Eq
- 649901-Equip Purch-Computer-Supercomp Syst
- 649902-Equip Purch-Computer-Desktop Syst
- 649903-Equip Purch-Computer-Servers
- 649904-Equip Purch-Computer-Visualization
- 949905-Equip Purch-Computer-Data Storage
- 649906-Equip Purch-Computer-Networking
- 649900-Inventorial Furniture
- 649002-Hospital Equip-New
- 649004-Hospital Equip-Replacement

Custom Field Value List for Step 14:
- Equipment? = Y

If the PO Document Total is over $100K and the CF "Bid/Sole Source Requirement is null, PO routes to BUS-43 Compliance Folder for review.

If PO contains a Specialty Form Type with workflow identified in Forms Admin, route to the Forms Approval Folder to reviewed as specified in Forms Admin.

If PO Includes the combination of a Radioactive product (by flag) and a Non-Radioactive Product, route to the Rad/Non-Rad Handling for review.

If PO contains any of the following conditions, route to Inventorial Equipment Folder for review:
- If individual line item ins > $4680,
- Custom Field Value "Inventorial Equipment?" = true, or one of the Equipment Account Codes (see sidebar) is selected.