Progression of a buyWays transaction

Cart

Shopping
- hosted catalogs
- punch-outs
- Clemson forms
- favorites

1a

Requisitioning
- Requisitioner enters accounting codes

1b

Requisition

Approval(s)
- Dept and/or PI
- VP & CFO approvals
  if > $100,000

2

Procurement Services
- if > $2500

3

Purchase Order

Suppliers

Bidding
- If > $2500

4

5

6

Notations

1a: Shopper selects their goods and/or services
1b: Requisitioner enters the proper accounting codes
2: PeopleSoft validates chartfields and conducts a budget check
3: Approval process is executed based on the requisitions characteristics
4: PeopleSoft conducts budget check for PO’s < $2,500
5: Special handling step for PO’s requiring bidding; Budget check & encumbrance of funds occurs when bidding is complete
6: PO is automatically sent to the supplier via buyWays

*POs created using the Direct Payment form are NOT sent to suppliers
Progression of a buyWays transaction

Notations

7: Receiving is required for all buyWays transactions; equivalent to the “okay to pay” signature required today. Receiving may take place as an “assumed receipt” 5 days from invoice under the Negative Assurance of a Receipt policy for small dollar orders (<$2500).

8: eInvoices may arrive simultaneously with the package because the supplier’s system electronically sends the invoice at the same time they start the shipment of the goods.

8: For paper invoices, the invoice is entered into buyWays, to include invoices for Direct Payment forms.

9: Payment to the supplier happens only when the PO, receipt and invoice match; CUBS determines the appropriate supplier payment date.
## Approval Workflow Steps

Based on the characteristics of the requisition (amount, types of purchases and form type), the workflow is programmed to obtain appropriate approvals based on the criteria noted below.

Note: The majority of your requisitions will have a limited number of approval steps.

<table>
<thead>
<tr>
<th>Approval Step</th>
<th>Activated by</th>
<th>Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Approval</td>
<td>$ limit set by department</td>
<td>Requisitioner (upon submit)</td>
</tr>
<tr>
<td>Department</td>
<td>$ limit set by department</td>
<td>Department approver</td>
</tr>
<tr>
<td>Project</td>
<td>$ limit set by department</td>
<td>Project approver</td>
</tr>
<tr>
<td>Project Coordinator</td>
<td>$ limit set by business office</td>
<td>Grants coordinator</td>
</tr>
<tr>
<td>SPAA</td>
<td>If fund 20 &amp; accounting code=7004, 7005 &amp; 8xxx</td>
<td>Sponsored Programs</td>
</tr>
<tr>
<td>Form approvals</td>
<td>Dependent on the form</td>
<td></td>
</tr>
<tr>
<td>Buyer 46</td>
<td>&gt;= $2,500 and &lt; $10,000 &amp; not on contract</td>
<td>Certified buyer 46</td>
</tr>
<tr>
<td>Director of Procurement</td>
<td>Sole source or vehicle or trade-in</td>
<td>Mike Nebesky</td>
</tr>
<tr>
<td>Purchasing Gatekeeper</td>
<td>&gt;= $2,500 &amp; not on contract</td>
<td>Mike Nebesky or Scott Pigeon</td>
</tr>
<tr>
<td></td>
<td>&gt;= $2,500 &amp; not on contract that requires bidding</td>
<td>Buyer</td>
</tr>
<tr>
<td>Purchasing Agent Review</td>
<td>Sole source</td>
<td>Charles Tegen</td>
</tr>
</tbody>
</table>

### Notifications

<table>
<thead>
<tr>
<th>Notifications</th>
<th>These do not stop the approval process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hardware/Software</td>
<td>Hardware or software purchase &gt;= $2,500</td>
</tr>
<tr>
<td>EH&amp;S</td>
<td>Controlled substance, recycled, hazardous, radioactive, rad-minor, select agent, toxin, energy star &amp; green</td>
</tr>
<tr>
<td>Equipment Inventory</td>
<td>Accounting code = 8xxx and &gt;=$5,000</td>
</tr>
</tbody>
</table>