Catalog Purchase Processing Overview

Window Shopper fills shopping cart

Requester fills shopping cart

Window Shopper checks out cart

Requester checks out cart

Window Shopper assigns cart to Requester

Requester reviews requisition and submits order

Requisition enters approval process

PO is created

PO is transmitted to Supplier

Supplier ships order, and issues electronic invoice

Order is received

Invoice is received in AggieBuy

Receipt is entered in KFS (Capital Assets only)

Receipt is entered in AggieBuy (optional)

Invoice is exported to KFS

* If an Approver rejects a Requisition, the Requester is notified and no PO is created. If an order fails a Validation, the Requisition returns to the Requester for correction. An Approver can also return a Requisition for correction.
Window Shopper – Users with the role of Window Shopper can fill a shopping cart and check it out, but cannot submit an order. A Window Shopper must assign a cart to a Requester for it to be submitted.

Requester – Users with the role of Requester can fill a shopping cart, check it out, and submit the order, and can submit orders assigned to them by a Window Shopper.

Departmental Approval – Before submitting a requisition, a requester can enter the name of a Departmental Approver, who will then be added to the approval workflow before the Fiscal Approver.

Fiscal Approval – Fiscal Approvers are authorized to approve purchases funded by specific accounts. Most accounts also have Delegates assigned who can approve purchases funded by that account.

Validation – In a Validation step, the system automatically checks for the presence and validity of certain required information, like account number, commodity code, etc.

Inv Equip/Asset Mgt Review – Purchases that qualify as Capital Assets are reviewed at this step by an Asset Manager.