

Sourcing Review Enablement

Quick 'how to' on the creation of Sourcing Review Workflows.

A Sourcing Review is the process of having a Purchase Requisition go through a special workflow (reviewed by a Sourcing Approver) to ensure the company is receiving the best price, from the most appropriate supplier on any item or service needed.

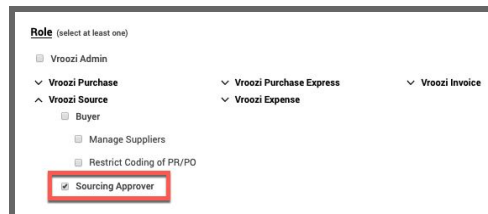
Since not all orders need to go through this kind of review; the company's Admin can set rules that would trigger the review of a purchase request or change request. The company's Admin will set these tables dependent upon the direction of the Company's Sourcing team. Once the sourcing workflow is activated, all PR's will be checked against the rules set on the tables explained below.

CREATE SOURCING APPROVERS

Responsible for sourcing review of specific Requisitions before the requisition goes through any financial approval. Sourcing Approvers apply to the use of Sourcing Rules outside of any Buy Route workflows.

Sourcing Approver Role

- Users with the Sourcing Approver role can be added to other roles.
 - *Master Data >Users >Create a new user*
- [Editing rights](#) applied as a global setting.



Sourcing Workflow Enablement

1. Toggle on 'Sourcing Workflow'
2. Toggle on 'Editable PR' to allow all sourcing approvers to have access to Edit Purchase Requests. This is a global function and cannot be removed at the individual approver level. (*Shown on next page*)



Sourcing Rules

A Logic Rule Table sets the rules at which the PR is flagged for sourcing review and determines when the special workflow is activated. Through this feature Admins can activate/ deactivate items, search and filter or add a new Sourcing Rule.

When editing this page, fill out all the required fields and click 'Save Sourcing Rule' button.

*Indicates a Required field.

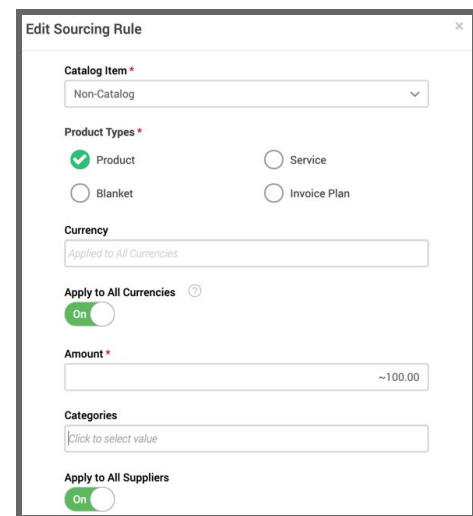
*Catalog Type

Can be set for Catalog or Non-Catalog Items.

Currency

Sourcing Workflows can be defined based on the currency being used. The system will convert the Requester spend threshold, the approvers approval limit and/or the PR total value to the default currency based on the exchange rate configured for currency type in the master data table.

Rules can be applied to All Currencies or a specific currency. ('Apply to All Currencies' shown on right) If the latter setting is chosen, only Requisitions with items containing the currency specified will be applied to the workflow.



*Amount

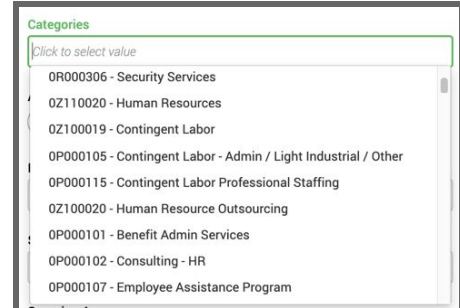
Enter currency amount that will necessitate review.



If 'Apply to All Currencies' is selected, the currency symbol will be removed from the 'Amount' field. (Shown below) All previous Sourcing Rule configurations remain.

Categories

Select existing Category(s) to apply to the Sourcing Rule. Multiple categories can be selected.



Suppliers

Toggle on to 'Apply to All Suppliers' or instead add specific 'Blacklisted' suppliers to the rule. (Shown below)

If 'Apply to All Suppliers' is toggled off, 'Black listed Suppliers' becomes a Required field.



Supplier Part Number

This is a free text field to enter a part number. Only one part number can be entered so the rule would apply only to that part number. If using part number, be sure that any category or specific supplier selected match the category and supplier for the part number.



Sourcing Approvers

Select specific Sourcing Approvers who will be responsible for any requisitions that are flagged for review by this rule. If multiple Sourcing Approvers are selected, only one person is needed to review. The Requester will be prompted to select one of the Approvers before they can submit their requisition.



If no sourcing approvers are selected here and the field is left blank, the Requester will select one approver from All Sourcing Approvers.