Boise State University | University Financial Services
Standard Operating Procedures

| 1. | Title: | Fisher Scientific Punchout Catalog – Requisition Creation & Payment Process |

I. **Purpose & Overview**

The purpose of this document is to provide campus users with sufficiently detailed information to complete a purchase of goods via Fisher Scientific Punchout Catalog in accordance with University policy and central administration requirements. Information about procuring goods and paying for procured goods via Fisher Scientific Punchout Catalog is outlined in the following sections.

II. **Procedure**

1) **Process Flow**

![Image of process flow diagram]

2) **Definitions**

   a. **Punchout Catalog**: The process of beginning a transaction in OFC and “punching out” into an external ordering system to select items for purchase. The selected items will be imported back into OFC for purchase via Standard Requisition.

   b. **Standard Requisition**: A request for goods and/or services from a non-employee individual or entity that cannot be paid for within the P-Card limits or is greater than $2999.

   c. **Charge Account**: Indicates the funding source used to pay each line item on a purchase requisition and includes fund, department, cost center, account, supplemental, and project segments.

   d. **Requester**: Indicates the employee requesting the purchase and drive standard approval workflow. This may be different from the employee entering the transaction.

   e. **POET**: Indicates a restricted funding source used to pay the specific line item on a purchase requisition. It will include a project, department, and account segments and task number.
3) **Requirements**

   a. **Access to Fisher Scientific Punchout Catalog**
   b. **Requisition Line**
      i. **Line Type:** This field will automatically default when items are imported from Fisher Scientific Punchout Catalog.
      ii. **Item Description:** This field will automatically default when items are imported from Fisher Scientific Punchout Catalog. Special instructions to Buyer should be added in the Notes to Buyer box rather than in the Item Description.
      iii. **Category Name:** This field will automatically default when items are imported from Fisher Scientific Punchout Catalog.
      iv. **UOM (Unit of Measure):** This field will automatically default when items are imported from Fisher Scientific Punchout Catalog.
      v. **Price:** This field will automatically default when items are imported from Fisher Scientific Punchout Catalog.
      vi. **Supplier:** This field will automatically default when items are imported from Fisher Scientific Punchout Catalog.
      vii. **Delivery**
          1. **Requester:** The requisition will be routed to the supervisor of the requester for review and approval.
          2. **Need by Date:** Default is 7 days.
          3. **Deliver to Location:** Defaults to Central Receiving.
   viii. **Billing:** Enter funding source information for the transaction. Each line of a requisition must have a funding source entered.
       1. **POET:** Used to enter project funding sources.
          a. **Project Number:** Ten digit project segment.
          b. **Task Number:** 100002 for tagable assets, otherwise use 100001.
          c. **Expenditure Type:** Six digit account segment.
          d. **Expenditure Organization:** Five digit department segment.
       2. **Charge Account:** This describes the funding source and should only be updated for non-grant funding sources. Each segment should be entered.
          a. **Funding Source:** Select a favorite from your drop down. <OR> Enter
          b. **Fund:** Four digit fund segment.
          c. **Department:** Five digit department segment.
          d. **Cost Center:** Seven digit cost center segment.
          e. **Account:** Six digit account segment.
          f. **Supplemental:** Ten digit supplemental segment; enter zeroes if not used.
          g. **Interfund:** Default to 0000.
          h. **Project:** Ten digit project segment; enter zeroes if not used.
          i. **Future1:** Default to 0000000000.
   ix. **Justification:** Enter the business purpose.
c. Approval Workflow
   i. **Funding Source Person**: The requisition will be electronically routed to the funding source person of the department segment entered for each Charge Account for compliance and budget review and approval.
   ii. **Supervisor**: The requisition will be electronically routed to the supervisor of the employee that is entered as the Requester for strategic review and approval.
   iii. **Principal Investigator (PI)**: The PI will be added to the approval workflow with project-funded transactions for review and approval.
   iv. **Additional Approval Levels**: The requisition will be electronically routed to additional levels of approval for higher dollar amounts.
      (1) >$9,999: Department Head, Chair, Director
      (2) >$24,999: Dean, Associate Vice President
      (3) >$50,000: Vice President
      (4) **Federally Funded Requisitions >$9,999**: Route to Office of Sponsored Programs and Route to Purchasing.
   v. **Modifying**: Approvers are able to modify the approval workflow to delegate, reassign, or add approvers in the approval workflow according to department business process.

d. Receiving and Paying for Items
   i. Fisher Scientific will generate an electronic email once the catalog order ships. An invoice import process will run weekly to move the electronic invoices to OFC.
   ii. The requester of the Fisher Scientific Catalog Order will receive an email notification requesting invoice approval. **Do not approve Fisher Scientific Catalog Order invoices prior to receipt of items.**
      (1) **Acceptable Items**: Once items are received, if they are deemed acceptable by the Department, the requester will approve the electronic invoice via email or OFC Worklist. **Approval of invoice** is confirmation that all items have been received and are acceptable.
      (2) **Unacceptable Items**: If items received are not acceptable (broken, incorrect, etc.) the Department must call Purchasing at (208) 426-1107 to discuss next steps.

4) **Best Practices**
   a. Ensure the Requester and Funding Source are correct prior to submitting to ensure standard approval workflow is correct.
   b. Attach any internal documentations to the top of the Requisition for ease of access to all attachments.
   c. Confirm items are acceptable prior to approving the electronic Invoice.

### III. Additional References

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<thead>
<tr>
<th>Source</th>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Oracle Financials Cloud (OFC)</strong></td>
<td>System</td>
<td>Expense Reports are entered in OFC for expense items, approval, and reimbursement.</td>
</tr>
<tr>
<td><strong>Fisher Scientific PunchOut Catalog</strong></td>
<td>Training</td>
<td>This tutorial will guide you through shopping Fisher Scientific Catalog and paying for items received.</td>
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