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PURCHASING USER MANUAL

CREATING REQUISITION WORKFLOWS

INTRODUCTION

Before creating workflows in Purchasing, it will help to outline your agency's approval process, identifying where a requisition begins, who makes the first approval, the second, etc., and the final approval. If you have different approval processes for different types of requisitions, you should outline them.

A workflow is the path for routing a requisition line item for approval. You can create as many workflows as necessary, each with as many approval levels and as many approvers as needed. While [Requisition Departments](#) can also be used for an approval process, they are not required. However, at least one workflow is required for any agency.

Workflows can also contain a hierarchy of approval levels, so if you need requisitions to move from one approval to the next and to a final approval level, you would use a workflow to create that process.

A requisition can be made up of several line items and each individual item can be assigned to a different workflow, based on however an agency decides, e.g., by the commodity or the amount, etc.

Approvers must be assigned to the same workflow as the requisition line items to be able to approve the line items.

CREATE A REQUISITION WORKFLOW

Three components make up a workflow: 1) the name of the workflow, 2) the names of approval levels, and 3) the individual approvers. First however, [users must be added](#) and set up as Approvers in order to add them to the workflows.

1. Open **Purchasing**, and then click **Administration**.
2. After adding users as approvers, click the **Agency** tab, and then click the **Workflow** tab.
3. Type a name for the **Workflow** (approximately 50 characters). (The workflow will be selected when a requisition line item is added.) Be sure the **Active** check box is checked. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****.

Figure 1 - New Workflow

4. Click **Add**.
5. Click **Select** next to the Workflow. The **'Workflow' Approval Levels** section will appear. (The name of the workflow approval level corresponds to the name of the workflow.)
6. Type a name for the **'Workflow' Approval Level** (approximately 50 characters). Do not use special characters or symbols, including **&**, **'**, **"**, **<**, and ****.

Figure 2 - New Workflow Approval Level

7. Click **Add**. NOTE: You can sort the hierarchy of approval levels by clicking **Up** or **Dn** next to each level. However, once a workflow has been used (a requisition assigned to it), you will not be able to change the order of the approval levels.
8. Click **Select** next to the **'Workflow' Approval Level**. The **Approvers** section will appear (labeled with whatever you named the workflow approval level). The approval levels are in hierarchical order. That is, a requisition must be approved by the first level before it can be approved by the second level.
9. Select the approver name(s) from the drop down menu and then click **Add**. You can assign the same user(s) to different approval levels. You can also assign the same user(s) to different workflows.

Figure 3 - Add approvers

NOTE: Although the approvers appear in a list, functionally they are a group of approvers – they are not in a hierarchical order. You can create separate approval

levels (which are in hierarchical order), and then assign the approvers to each individual level. This creates a process whereby a requisition has to be approved by a person in one level before it can be approved by a person in the next level.

EDIT A WORKFLOW

1. To change the name of a workflow or workflow approval level, click **Edit** next to the workflow or level, change the name, and then click **Update**.
2. To delete a workflow, click **Del** next the workflow. All associated levels will be deleted. However, once a workflow has been used (a requisition assigned to it), the workflow cannot be deleted and **Del** will be disabled, even if all requisition items in the workflow have been processed. Once a workflow is used, the only changes you can make are to add or remove approvers, rename the approval levels, and rename the workflow.
3. To change or remove approvers, click **Edit** or **Del** next to an approver's name and then click **Update**.
4. To add a new approver, click **Add** below the list of approvers, add the approver, and then click **Update**.

ADD OR UPDATE WORKFLOW APPROVERS

Once approval levels have been created, individual approvers can be added or removed to workflows, or moved to different approval levels either on the **Agency** screen, or more easily on the **User Maint** (User Maintenance) screen.

1. Click **Select** next to an approver on the **User Maint** screen.
2. Click **Edit** next to the workflow you want to change for the Approver.

Figure 4 - Update an Approver

The screenshot displays the 'User Maintenance' interface. At the top, there is a table of users with columns for 'UserName', 'FirstName', 'MName', 'LastName', 'Act', 'Adm', 'Auth', 'Code', 'App', 'Asgn', 'Pur', 'P', 'Apr', 'Rec', and 'Email'. The user 'JEREMY WINSLOW' is highlighted with a red circle. Below the table is a detailed form for editing the selected user. The form includes fields for 'Username', 'First Name', 'Last Name', and 'Email', and checkboxes for various roles: 'Active User', 'Admin', 'Assigner', 'Authorizer', 'PO Approver', 'Coder', 'Purchaser', 'Approver', and 'Receiver'. There are also input fields for 'Max PO Amt' and 'Max Item Amt'. At the bottom of the form, it shows 'Created by R STEVEN FALTER' and 'Edit by DAN GREITZER'. Below the form is a 'Workflow' table with columns for 'Workflow', 'Level', and 'Active'. The 'Office Supplies' workflow is highlighted with a red circle, and its 'Approval 1' level is also circled in red. A red arrow points from the 'Edit' button in the 'Office Supplies' row to the 'Update User' button in the user details form.

UserName	FirstName	MName	LastName	Act	Adm	Auth	Code	App	Asgn	Pur	P	Apr	Rec	Email
Select TU ANH BOCKENSTETTE	TU ANH		BOCKENSTETTE	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	tbockenstette@sco.idaho.gov
Select R STEVEN FALTER	R STEVEN		FALTER	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	sfalter@sco.idaho.gov
Select DAN GREITZER	DAN		GREITZER	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	dgreitzer@sco.idaho.gov
Select JEREMY WINSLOW	JEREMY		WINSLOW	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Select MERIDETH HACKNEY	MERIDETH		HACKNEY	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	mhackney@sco.idaho.gov
Select SUANNE KORA	SUANNE		KORA	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	skora@sco.idaho.gov
Select JAMES CARTER	JAMES	H	CARTER	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	jcarter@sco.idaho.gov
Select CONNIE HILL	CONNIE		HILL	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	chill@sco.idaho.gov
Select MARY EVERILL	MARY		EVERILL	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	peverill@sco.idaho.gov
Select PAMELA MENJIVAR	PAMELA	F	MENJIVAR	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	pmenjivar@sco.idaho.gov

Cancel	<input checked="" type="checkbox"/> Active User	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> Assigner	Update User
Username	JEREMY WINSLOW	<input checked="" type="checkbox"/> Authorizer	<input checked="" type="checkbox"/> PO Approver	Approval Rules
First Name	JEREMY	<input checked="" type="checkbox"/> Coder	<input checked="" type="checkbox"/> Purchaser	
Last Name	WINSLOW	<input checked="" type="checkbox"/> Approver	Max PO Amt	0.00
Email		<input checked="" type="checkbox"/> Receiver	Max Item Amt	0.00

Workflow	Level	Active
Edit Del Office Supplies	Approval 1	✓
Add DSA TEST	LEVEL 1	✓

3. Click the drop down menus for the **Workflow** and/or the approval **Level** to assign the approver to either a different workflow or to move them to a different approval level within a workflow.

Figure 5 - Update the workflow assignment

Created by R STEVEN FALTER 6/30/2006 Edit by DAN GREITZER 8/30/2007

User Departments	Workflow	Level	Active
Add ABC-ABC Dept (Req)	Update Office Supplies	Approval 1	<input checked="" type="checkbox"/>
		Approval 1	
		Approval 2	

4. Click **Update**.
5. Click **Update User**.

When adding a new approver to the application:

1. After finding and adding the new approver, the workflow drop down menus will become available.
2. Click the drop down menus for the **Workflow** and the approval **Level** to assign the approver to a workflow and an approval level.
3. Click **Add** next to the workflow.
4. Click **Update User**.

Figure 6 - Adding new approver to workflow

UserName	FirstName	MName	LastName	Act	Adm	Auth	Code	App	Asgn	Pur	P Apr	Rec	Email
Select	DANA HANSON	DANA	HANSON	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								dhanson@sco.idaho.gov
Select	JUDY HUSFLOEN	JUDY	A HUSFLOEN	<input checked="" type="checkbox"/>									jhusfloen@sco.idaho.gov

Created by JAMES CARTER 11/30/2010 Edit by JAMES CARTER 11/30/2010

User Departments	Workflow	Level	Active
Add ABC-ABC Dept (Req)	Add Office Supplies	Approval 1	<input checked="" type="checkbox"/>
		Approval 1	
		Approval 2	

EXAMPLES OF REQUISITION WORKFLOWS

Below are three examples of requisition workflows, indicating workflows by bureau, office function, location, etc.

Figure 7 - Workflow example 1

Workflow		Department	
Work Flow			
Workflow	Active		
Select Edit Del CSC	<input checked="" type="checkbox"/>		
Select Edit Del Admin	<input checked="" type="checkbox"/>		
Select Edit Del SCO	<input checked="" type="checkbox"/>		
Select Edit Del Accounting	<input checked="" type="checkbox"/>		
Select Edit Del test	<input checked="" type="checkbox"/>		
Select Edit Del Worker	<input checked="" type="checkbox"/>		
Select Edit Del walkthru	<input checked="" type="checkbox"/>		
Add	<input checked="" type="checkbox"/>		
Admin Levels			
Level			
Select Edit Del Mgr	<input type="checkbox"/>	Up Dn	
Select Edit Del Division	<input type="checkbox"/>	Up Dn	
Select Edit Del Fiscal	<input type="checkbox"/>	Up Dn	
Select Edit Del Adm	<input type="checkbox"/>	Up Dn	
Add	<input type="text"/>		
Mgr Level Approvers			
Approver		Active	
Edit Del TU ANH BOCKENSTETTE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit Del JAMES CARTER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit Del DAN GREITZER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit Del SUANNE KORA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit Del PAMELA MENJIVAR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Add	TU ANH BOCKENSTETTE	<input checked="" type="checkbox"/>	

Figure 8 - Workflow example 2

Workflow		Department	
Work Flow			
Workflow	Active		
Select Edit Del IT	<input checked="" type="checkbox"/>		
Select Edit Del General	<input checked="" type="checkbox"/>		
Select Edit Del Western	<input checked="" type="checkbox"/>		
Select Edit Del Eastern	<input checked="" type="checkbox"/>		
Select Edit Del Northern	<input checked="" type="checkbox"/>		
Select Edit Del Southern	<input checked="" type="checkbox"/>		
Add	<input checked="" type="checkbox"/>		
Eastern Levels			
Level			
Select Edit Del Supervisor	<input type="checkbox"/>	Up Dn	
Add	<input type="text"/>		
Supervisor Level Approvers			
Approver		Active	
Edit Del DON HAMM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Add	AL BIELEN	<input checked="" type="checkbox"/>	

Figure 9 - Workflow example 3

Workflow		Department	
Work Flow			
Workflow	Active		
Select Edit Del Consumer	<input checked="" type="checkbox"/>		
Select Edit Del Criminal	<input checked="" type="checkbox"/>		
Select Edit Del Water	<input checked="" type="checkbox"/>		
Select Edit Del FRAUD	<input checked="" type="checkbox"/>		
Select Edit Del FISCAL	<input checked="" type="checkbox"/>		
Add	<input checked="" type="checkbox"/>		
Consumer Levels			
Level			
Select Edit Del Admin Assistant	<input type="checkbox"/>	Up Dn	
Select Edit Del FISCAL	<input type="checkbox"/>	Up Dn	
Select Edit Del BOSS	<input type="checkbox"/>	Up Dn	
Add	<input type="text"/>		
Admin Assistant Level Approvers			
Approver		Active	
Edit Del JACK DYSON	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit Del PABLO PICASSO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit Del JACK TILLSON	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit Del PAUL GOVT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Add	JACK DYSON	<input checked="" type="checkbox"/>	