

Purchase Request Workflow Reference Guide

Fields, Statuses, and Approval Action

This guide describes the fields, statuses, and workflow actions within the purchase request approval process.

Audience: Supervisors and Accounting.

Common Terms

Workflow – A process in which users review forms and take actions.

Assignment – A form assigned to a specific user as designated from a workflow.

Workflow Actions – Specified set of actions available to take on the form when users receive an assignment.

Purchase Request Form Fields

Purchase Request Number – System generated unique identifier.

Procurement Number – Number of the purchase order associated to the purchase request.

Date Submitted – Date the purchase request was submitted.

Submitter – The name of the user who submitted the purchase request.

Total – Total cost of the items, including tax and shipping.

Summary of Need – The business justification for the purchase of items.

Purchase Request Status – Indicates which stage of the approval workflow.

Vendor – The vendor's name.

Vendor Code – an alpha numeric value associated with the vendor.

Purchase Request Status Values

- **Submitted** – Request has been submitted but failed to route to Stage 1 approval.
- **Pending Stage 1 Approval** – Awaiting for supervisor approval.
- **Pending Stage 2 Approval** – Awaiting for an approval from Stage 2 approvers.
- **Pending Stage 3 Approval** – Awaiting for the approval from the fiscal manager.
- **Request Denied** – Request has been denied.
- **Additional Information Needed** – Returned to submitter for clarification from the approvers.
- **Accounting** – Fully approved and pending account processing.
- **Complete** – Approval and accounting process is complete.

Purchase Request Approval Process

Process Overview

The Purchase Request Approval Process consists of four phases.

1. Stage 1 – Supervisor approval.
2. Stage 2 – Multiple approvers; one approval required.
3. Stage 3 – The fiscal manager approval.
4. Accounting – Payroll clerk processes purchase request.

Approver Workflow Actions

Below are the available workflow actions for the approvers:

- **Approve** – Record the approver and date.
- **Request More Information** – Return the purchase request to the submitter.
- **Reject** – Reject the purchase request and notify submitter and the approvers.
- **Reassign** – Render a list of users to reassign the purchase request
- **Return to Previous Stage** – Return the purchase request to the previous approver for review.

Accounting

After final approval, the purchase request is routed to the accounting team.

- An accounting supervisor assigns the request to a payroll clerk.
- If the appropriate user is unavailable, contact an administrator to add the user.
- The assigned payroll clerk processes the request and enters the procurement number.
- Once processing is complete, the purchase request status is updated to **Complete**.