E-Procurement System Tutorial (for approver)

E-Procurement is an online system that allows the user to purchase products/services from vendors. The purpose of this manual is to provide a comprehensive look at the workflow process to perform tasks associated with order approval for each department.

When a user creates a requisition with the amount greater than $1000, it will be sent to a departmental approval folder. All the “Approvers” listed in the approvals folder will get email notifications of the pending requisitions.

<table>
<thead>
<tr>
<th>Purchase Amount</th>
<th>Order Processing</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0. - $1000.</td>
<td>Orders continue to be issued directly to the vendor.</td>
</tr>
<tr>
<td>$1001. - $5000.</td>
<td>Order requires business representative approval prior to distribution to the vendor.</td>
</tr>
<tr>
<td>&gt; $5001.</td>
<td>Order requires business representative approval and purchasing approval prior to distribution to vendor.</td>
</tr>
</tbody>
</table>

Approvers are notified of requisitions (amount over $1000) requiring attention in one of two ways:

1. The Action Items - Approvals section on the Home Page provides approvers with a summary of requisitions available for review in the workflow process.

2. Approvers are notified via email when a requisition has been routed to their departmental folder. This email contains a link that takes the approver directly into the appropriate approval area. It is important to remember that multiple people may receive the same email if more than one approver is allowed to approve the same type of order.

Note: Users must have the proper email notifications setup in their profile to receive emails for workflow approval.

In your department approval folder you will see a list of requisitions that are “unassigned”, you must assign the requisition to yourself for review (approve or return to user) then the requisition will be routed to your “My Approvals folder” for your approval. After you have moved the requisition(s) to your approvals folder, the next step is to review the requisition(s) for processing.

Click “view” to view the requisition for accuracy.

To approve the requisition, click on the box under the “Select” column, then select “Approve/Complete” from the drop down menu and click on “Go”.

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Returning a requisition to the requisitioner:
An approver may want to return a requisition to the original requester for updates to the index/account fields or line details. This task allows approvers to return instead of rejecting a requisition. When a requisition is returned it becomes a draft cart and is no longer visible as a requisition. The returned requisition can be updated by the requisitioner and resubmitted into the workflow process, the requisition will restart workflow from the beginning regardless of the step it was returned from.

The return requisitioned will be return to the original requester.

Access the purchase requisition, and assign it to yourself (for review). From the Available Actions drop-down box in the upper right-hand corner, select Return to Requisitioner, then click the Go button.

The following overlay window displays. From here, enter the reason for the return. This note will be available via the Comments and History tab and will be sent in the email to the requisitioner.
The requisitioner can then access the requisition from the carts tab - draft carts sub-tab. Returned requisitions are listed in the My Returned Requisitions table. From there, they can be opened, updated, and resubmitted.