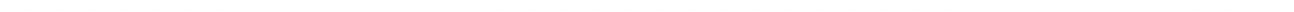


**PURCHASE REQUISITION
APPROVAL PROCESS**
v1.2



1. SuiteCRM setup for approval process

1.1 Modules

Software modules involved are „Purchase Requisitions“ and „Approvals“. Requisitions can have many Approvals. One Requisition may need to have several approvals by different management levels.

The „Approvals“ subpanel is only visible for users with „Approvers Role“.

„Assigned Approver/Editor“-field value defaults to Employee’s information „Reports To“-field. This can be changed if needed by the employee by using the popup lookup button next to the field. Soon as the record is saved it is locked and forwarded to the Approving manager. The Requisition can be saved as DRAFT if employee chooses his own username for the „Assigned Approver/Editor“-field.

The screenshot displays the 'Purchase Request: REQ0020»Edit' form in the ProcureMan DEV system. The form is organized into several sections:

- Header:** ProcureMan DEV | Purchase Request | Suppliers | Purchasing | Activities | Master Data | All
- Navigation:** Purchase Request : Create Purchase Request | View Purchase Request
- Form Title:** Purchase Request: REQ0020»Edit
- Buttons:** Save, Cancel, View Change Log, Save and Continue
- Fields:**
 - Assigned Approver/Editor: Emily Cheng
 - Request Description: New desk lamp
 - Expense Code: (empty)
 - Cost Center: (empty)
 - Date Required: (empty)
 - Department: (empty)
 - Requested Total Cost: 75.00
 - Justification: I need one
 - Requested For: (empty)
 - Remarks: (empty)
- Line Items:**
 - Line: 1
 - Quantity: 1
 - Price: 75
 - Cost Sum: 75.00
 - Product Name: Coffee Beans
 - Supplier: (empty)

The Approval is done by pressing the „create“-button in the Approval subpanel.

Purchase Request: REQ0018

[Edit](#) [Duplicate](#) [Delete](#) [Find Duplicates](#) [Create PO](#) [View Change Log](#)

Request ID Name: REQ0018	Requested For:
Department:	Status: Approved
Assigned Approver/Editor: Emily Cheng	Cost Center:
Request Description: new screen	Justification: Acer
Requested Total Cost: 587.00	Date Required:
Expense Code:	Remarks:
Created By: Jack Wong	Date Created: 09/05/2016
Modified By Name: admin	Date Modified: 09/05/2016

line item index: 1	line item name:
line item qty: 1	line item price: 587
Line Items: line item cost: 587.00	line item supplier: Lenovo
line item product: Lenovo Screen	

Approvals

[Create](#) [Select](#)

Approval Level	Approval Status	Created By	Date Created	Approved Product	Approved Amount	Remark	Next Level Approver
1st level	Approved	emily	09/12/2016 10:33am		587.00		Emily Cheng

Then approving manager can Approve, forward to next level or decline the Requisition.

Approvals **Documents**

Approvals

Approval Level: 1st level

Approved Amount: 587.00

Next Level Approver: Albert Lee

Approval Status: Approved Forward to next level Declined

Remark:

Approved Product:

[Save](#) [Cancel](#) [Full Form](#)

The Requisition can be assigned back to the original Requestor or by editing the Requisition and changing the „Assigned Approver/Editor“ as the name of the original Requestor.

1.2 User setup

When a new user is created, also a new user group is automatically created (Group [username]) and assigned for the new user.

In Employee module the „Reports To“-field assigns the approving manager for the employee. The Approving Manager will be taken as default value for the „Assigned Approver“ field in the Purchase Requisition module. User can select another Approver with the lookup button.

In Employee module the „Approval Limit“-field will set the maximum approval

amount allowed for the approving manager. Approval Limit is compared to the „Requested Total Amount“-field in Purchase Requisition. This value must be in system default currency. If Approval limit is reached then the approving manager is forced to forward the Requisition to the next level approver.

DEMO Users

(login/password)

jack/jack – Requesting end user

emily/emily – Approving Manager for Jack

albert/albert – Approving Director for Emily

rosanna/rosanna – Purchasing agent

The screenshot shows the 'Edit' page for Emily Cheng in the ProcuMan DEV system. The page has a green header with navigation links: ProcuMan DEV, Employees, Suppliers, Purchasing, Activities, Master Data, All. There is a search bar and a notification icon. Below the header, there are buttons for 'Save', 'Cancel', and 'Save and Continue'. The main content area is titled 'Emily Cheng » Edit' and has a 'Basic' tab selected. The form contains the following fields:

- Employee Status: Active (dropdown)
- First Name: Emily
- Last Name: Cheng
- Title: (empty)
- Office Phone: (empty)
- Department: (empty)
- Mobile: (empty)
- Reports to: Albert Lee (highlighted with a green box)
- Other: (empty)
- Home Phone: (empty)
- Fax: (empty)
- IM Type: (dropdown)
- IM Name: (empty)
- Notes: (empty text area)
- Primary Address: (empty)
- City: (empty)
- State: (empty)
- Postal Code: (empty)
- Country: (empty)
- Approval Limit: 1,000 (highlighted with a green box)
- Email Address: support@procuman.com (Primary Reply-to)

1.3 Security Suite Settings in Administration

Following settings are to be active (default setup):
 „Inherit from created by user“

- This will automatically assign all user's groups for a new record, except those that are marked „Not Inheritable“.

„Filter User List“

- This will only display user's team members in list of values for the „Assigned Approver“ field, including his approving manager.

1.4 Groups

Groups control access rights for record rows (if specified in role).

Each Requestor user will belong to individual user group, for example, „Group Jack“. This group is assigned automatically to each new record (PR) that user creates. User will always be able to have read rights for records he created. It is also possible to have groups for business teams instead of individual user groups. In this case all requisitions are visible for all team members.

„Approvers Group“ is for all approving managers for them to see a specific set of reports that support the approval process (Requisition lists, Cost centers, budgets, etc). This group is marked as „Not Inheritable“ so it will not be attached to newly created records by those users that belong to the group.

ProcuMan DEV Security Groups Management Suppliers Purchasing Activities Master Data All 0

Security Groups Management : Create a Security Group Security Groups User Management Role Management Security Suite Settings

Security Groups Management: Group Jack Wong

Edit Duplicate Delete View Change Log

Name: Group Jack Wong Assigned to: Administrator
 Date Created: 04/09/2016 06:28am by Administrator Date Modified: 04/09/2016 06:28am
 Not Inheritable:
 Description:

Users Roles

^ Users

Select

Name	User Name	Email
Albert Lee	albert	support@procuman.com
Demo Demo	demo	support@procuman.com
Emily Cheng	emily	support@procuman.com
Jack Wong	jack	support@procuman.com
Rosanna Zhao	rosanna	support@procuman.com

1.5 Roles

Roles control access rights for modules and what highlevel datasets user can see.

„Requestor Role“ will have access to create and edit own Requisition records but list and view rights for his Groups. So user will be able to follow the progress of the Requisition but will no longer have write access for the Requisition record.

„Approver Role“ will have same access as „Requestor Role“ for the Requisitions module. Additionally „Approver Role“ will have access to „Approvals“ module as to create and edit own Approval records but list and view rights for his Groups approval records.

„Purchase Agent Role“ gives wider access for the agent creating the actual purchase orders after Requisition has been approved. Purchase Agent can convert the Purchase Requisition to Purchase Order by pressing the button „Create PO“ in the Purchase Requisition detail view.

„Finance Role“ is for finance department staff who need to update the incoming

invoice payment status.

1.6 Workflows

There are several workflows that control approvals and notification email sending.

Workflow „Requisition Status and Notify“ is created to change the status of the Requisition record. When Requisitionor assigns the record for his approving manager the „Requisition status“ is changed from „Draft“ to „Sent for Approval“. Approving manager receives email for the newly created Requisition.

Workflow „Final Approver Status“ changes the Requisition status from „Sent for Approval“ to „Approved“. This action takes place when the option „Approved“ is chosen in the „Approvals“ module. This workflow will also send email to a Purchasing Agent group to notify of the approval.