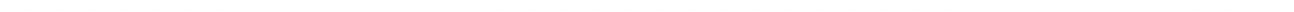# PURCHASE REQUISITION APPROVAL PROCESS
v1.2

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

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

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

1.3 Security Suite Settings in Administration

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

- This will automaticly 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 automaticly 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 invidual 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.

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.