

Purchasing Workflow Approval

Workflow approvals for Purchasing are only needed if certain criteria are met. There are three purchase order approval levels:

- Buyer Approval (required)
- Asset Approval (optional)
- Budget Reference Approval (optional)

Every purchase order will route to the Buyer approval level. The Asset and Budget Reference approval levels are triggered when certain information is added to the purchase order and needs further review.

Below are the Purchasing workflow levels and the purchase order criteria needed to trigger that level of approval workflow:

Approval Workflow Level	Description
Buyer Approval (required)	<p>If the PO is manually entered, it routes for Buyer approval and updates to a status of 'Pending Approval' or 'Open' depending on the Requester setup.</p> <p>If the PO is sourced from a Requisition with the Build PO's as Approved option selected, it will not route for Buyer approval.</p>
Asset Approval (optional)	<p>If a purchase order for an asset is created and submitted, it will automatically route to a designated approver if one of the following criteria are met:</p> <ul style="list-style-type: none"> • Account is an Asset Account and the Profile ID is blank <ul style="list-style-type: none"> ○ Account Range is between 800000 – 899999 OR ○ Account Range is between 743000 – 743999 with an amount greater than \$3,000 • A Profile ID exists, but account is NOT an asset account

Budget Reference (optional)	<p>If a purchase order is created and submitted, it will automatically route to a designated approver if one of the following criteria are met:</p> <ul style="list-style-type: none"> • The Budget Reference entered on the Purchase Order Distribution Line is different than the current fiscal year. • The purchase order was created from a requisition, but the Budget Reference on the purchase order Distribution line is different than the Budget Reference on the corresponding Requisition Distribution Line.
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Approver Review:

The Approver should review the purchase order and determine if any corrections are required. Asset Approvers should review the purchase order for the following:

- Asset Account Number
- Profile ID

Budget Reference Approvers should review the purchase order for the use of the Budget Reference Field and the corresponding requisition (if applicable).

If the approver feels the information is correct, they can approve the purchase order. The purchase order can then be budget checked and processed as normal.

If the approver feels the information needs correcting, then s/he can either correct the information if the user has the appropriate permissions to do so or reach out to the Buyer to correct the information. If a purchase order is approved and then changes are made to the purchase order, it must be resubmitted for approval.

Approval Workflow Escalation

If approvers do not act on a purchase order in the appropriate amount of time, they will receive a notification reminding them action is needed. The default workflow escalation times are:

- After 3 days: Notification is sent to Approver
- After 5 days: Escalation to the Admin

Please note these escalation times are determined by the institution and may vary depending on the institution's settings. Institutions should submit an ITS Helpdesk ticket if they would like to change the escalation times from the default.

Also, a Purchasing Admin does not have to go by the default wait time. They can escalate the purchase order at any time.