Template Applications – Purchase Requisition

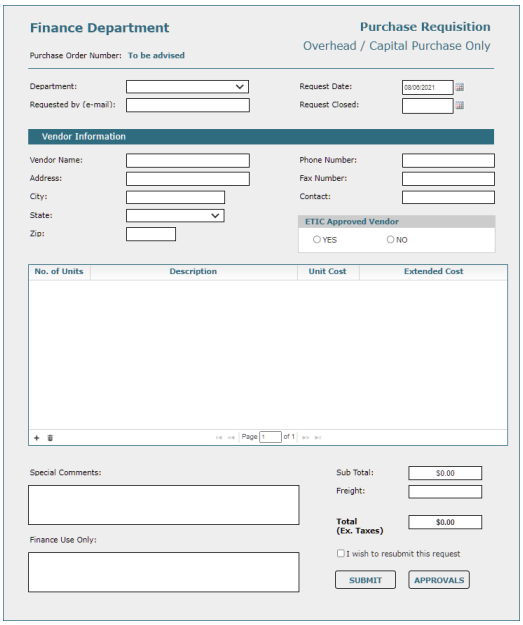
Contents

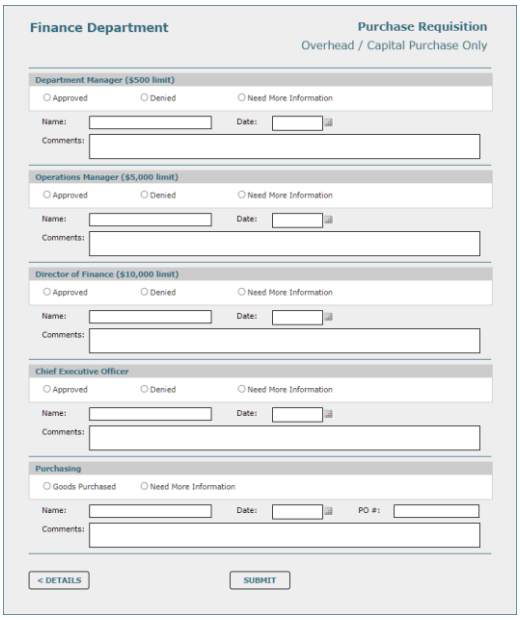
Introduction 2
Workflow Logic 3
Notable Behaviors 3
Installation Instructions 4
Mobile Version 5

Template Applications – Purchase Requisition

Introduction

This two-page application manages purchase requisitions. The first page collects details of the requester, vendor and specific request; the second page contains the approvals.



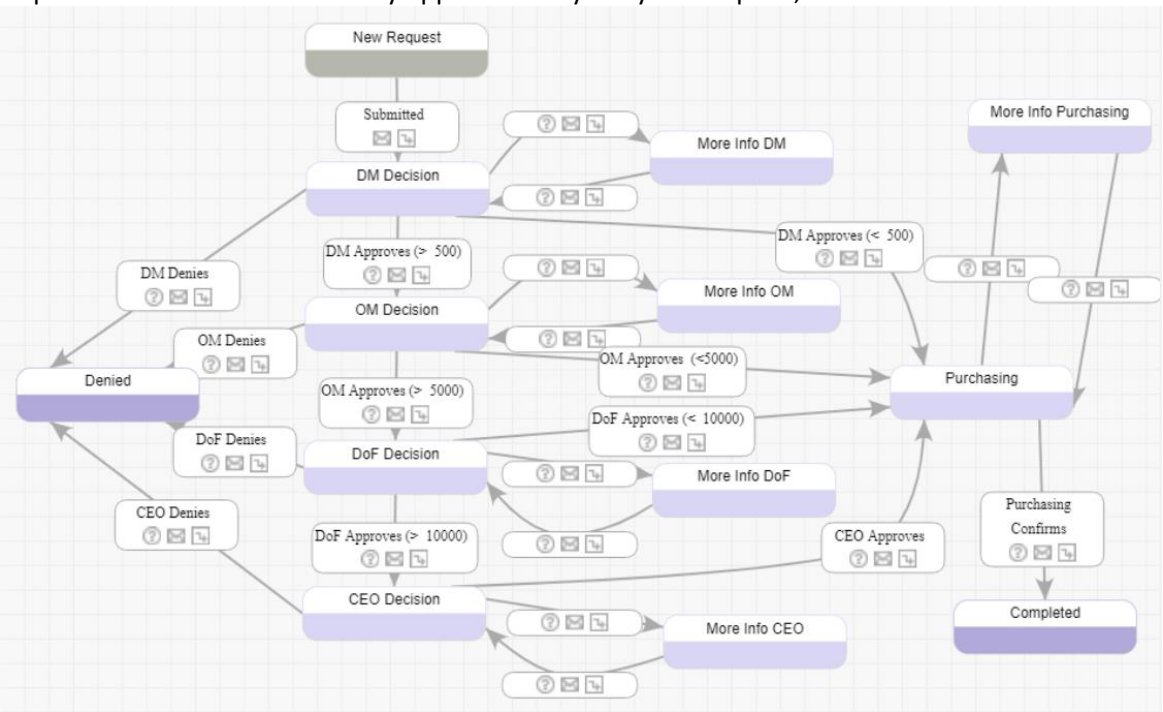


Template Applications – Purchase Requisition

Workflow Logic

All requests will require approval by the department head, who will have the final authorization for requests up to $500. For requests above that value, further permissions will be required depending on the value of the request. The Operations Manager will have final authorization for requests up to $5,000. The Director of Finance for requests up to $10,000, and the CEO will have final approval for requests over that value.
Once approved, the purchasing team will confirm when the order has been placed and will also confirm the PO number.

Any approver, or the purchasing team, may request more information. In these cases, the requester will be asked to provide the information and the request will be returned to the person that requested more information. Any approvers may deny the request, which will become closed.



Notable Behaviors

The logic used to manage the approval level based on the value of the request is found on the workflow diagram.

The approver's name will be mandatory at the time of the decision, and if that decision is 'Denied' or 'More Info Required,' the comments will also be mandatory. These mandatory checks are also included in the workflow diagram.

Template Applications – Purchase Requisition

Installation Instructions

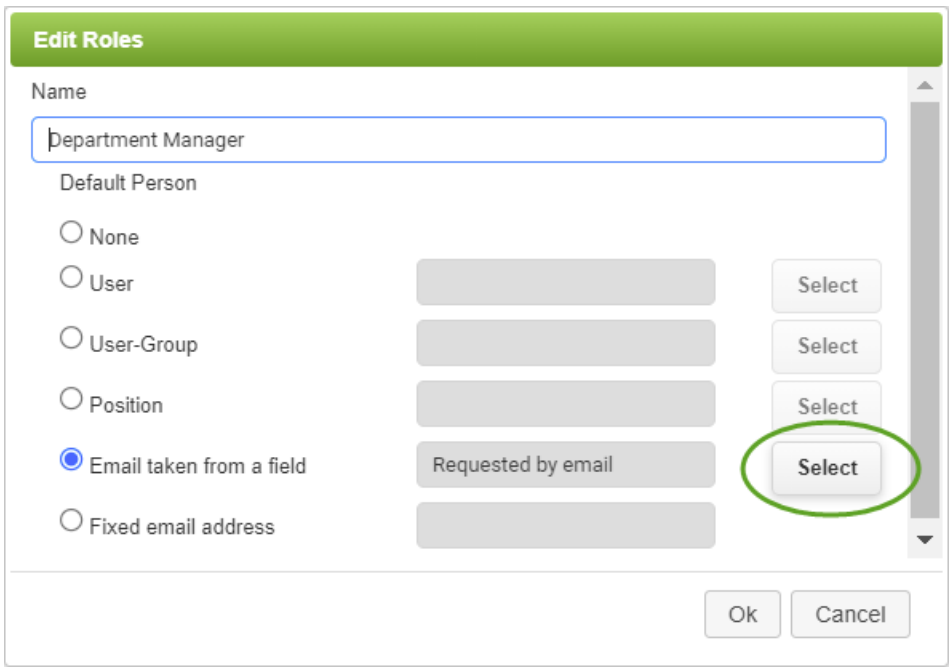
The application is initially designed in demonstration mode.

In normal circumstances, the Department Manager role will be linked to the department drop-down. The same person or team will occupy the Operations Manager, Director of Finance, CEO and Purchasing roles. Hence, it's not necessary to identify them in the application, but these roles can be linked directly to a user in your system or a specific email address. In demonstration mode, all the roles are connected to the Requester email field, but this will need to be changed before publication in your system.

You will need to select the department drop-down on the first page. Make any changes needed here and include the email address for each department manager in the value part of the drop-down properties.

Open the workflow diagram and select the workflow properties by clicking in the background of the drawing area but away from a stage object or pathway.

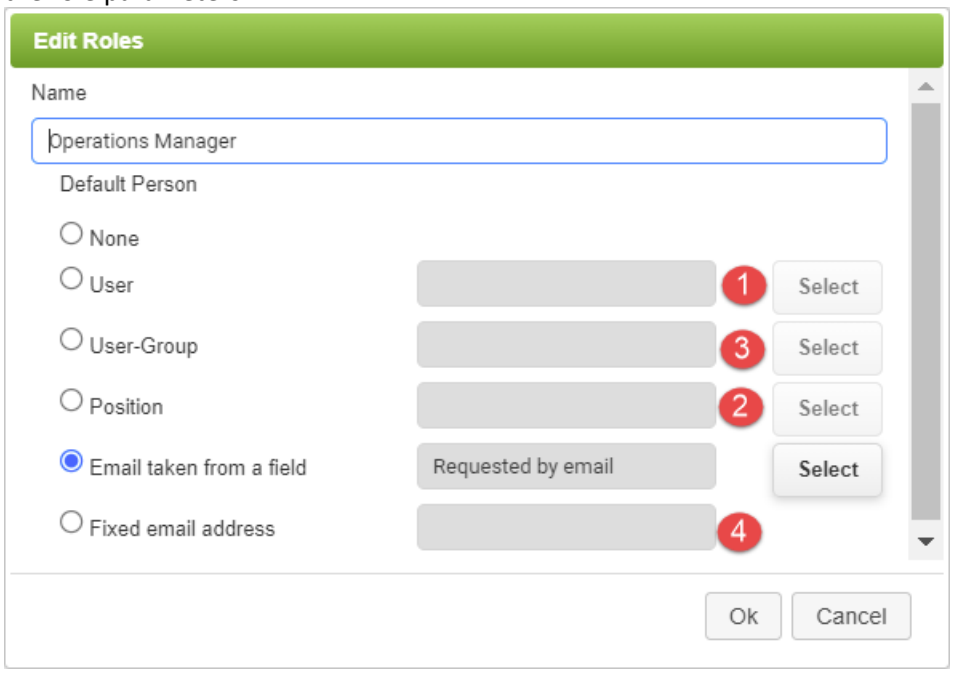
Select the Department Manager role and click on the Edit button to open up the Edit Roles dialogue box.



Click the Select button adjacent to the 'Email taken from a field' option, drill down into the application pages and select the 'Value' of the Department Drop-down on the first page.

Template Applications – Purchase Requisition

For the remaining roles, except for the requester that doesn't need changes, select each and modify the role parameters.



1. If your user is an individual and has a license in your account (Full, basic or limited), you can link directly using the User option. Select the 'User' option, click the corresponding Select button and choose from the list of users.
2. Suppose you have set up a position within your system for any of these roles and have selected the appropriately licensed user to occupy that position. In that case, you can link to that position. Select the 'Position' option, click the corresponding Select button and choose from the list of positions.
3. If your user, most likely the Purchasing role, will be part of a group responsible for managing these requests and has been defined within your system, you can link to that user group. Select the 'User-Group' option, click the corresponding Select button and choose from the list of groups.
4. You can link to the user's email address if none of the above is possible. Select the 'Fixed email address' option and enter the email address in the corresponding box. In this scenario, the user doesn't require a license (Full, basic or limited) in your system.

Click OK when done.

Mobile Version

This application is enhanced for mobile use.

If you have the mobile version license and want to utilize the feature for this application, please make sure that you check the option to make the Mobile version active after importing the application.