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ASCENDER - Manage Purchasing Approval Workflows

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ASCENDER - Manage Purchasing Approval Workflows i

After the Set up Purchasing Options and Permissions guide is addressed, use the following Workflow pages in the District Administration application to automate the purchasing approval process by establishing a first approver, approval path, approval rules, and alternate approvers. In addition, you can set up approval conditions such as approval limits, notifications, and alternate approvers.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

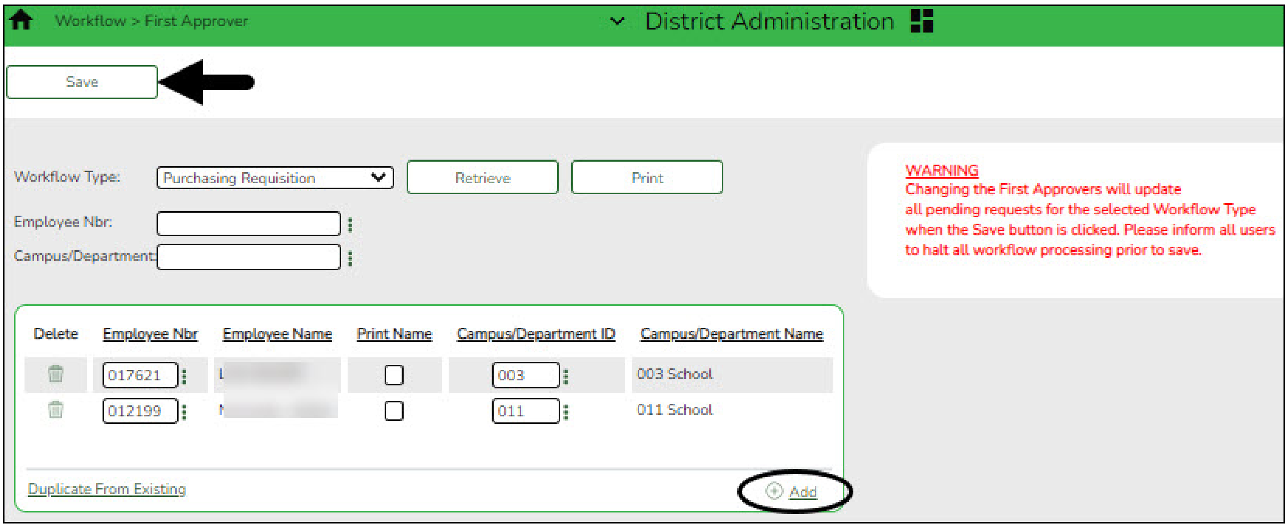
Manage Approvers, Workflows, and Approval Rules

1. Add first approver(s).

Add first approver(s)

District Administration > Workflow > First Approver

Create and maintain a list of first approvers for requisitions at each campus/department. These individuals are the first people at their assigned campus/department to view the submitted requisitions.



Workflow Type: Purchasing Requisition

Employee Nbr:

Campus/Department:

WARNING
Changing the First Approvers will update all pending requests for the selected Workflow Type when the Save button is clicked. Please inform all users to halt all workflow processing prior to save.

Delete	Employee Nbr	Employee Name	Print Name	Campus/Department ID	Campus/Department Name
	017621	[redacted]	☐	003	003 School
	012199	[redacted]	☐	011	011 School

Workflow Type	Click ⌄ and select the Purchasing Requisition workflow.

❑ Click **Retrieve**. If any first approvers exist, a list of first approvers for the various campuses/departments is displayed.

❑ Click **+Add** to add a first approver.

Employee Nbr	Begin typing an employee number or name. As you type the data, a drop-down list of corresponding data is displayed. Select an employee, or click ⋮ to select an employee from the Approver Directory. The **Employee Name** field is populated based on the selected **Employee Nbr**. **Note**: To view the first approver for a specific campus/department, leave the **Employee ID** field blank, type a specific campus/department, and click **Retrieve**.
Campus/Department ID	Type a campus ID or click ⋮ to select a one from the Department Directory. A list of all available campus IDs is displayed. The **Campus/Department Name** field is populated based on the selected **Campus/Department ID**. The Department Directory is populated from the campus/departments that are established on the District Administration > Tables > District Information > Campus Name/Address page. **Note**: To view all of the campuses/departments for a specific approver, leave the **Campus/Department** field blank, type a specific employee ID number, and then click **Retrieve**.
Print Name	Select to print the approver's signature on the purchase order.

☐ Click **Save**.

Notes:

- Only one first approver is allowed per campus/department.
- If an approver is the first approver for multiple departments, that approver needs to be added to the table multiple times.
- Only a first approver is allowed to insert another approver after their name.

2. Establish the approval path.

Establish the approval path

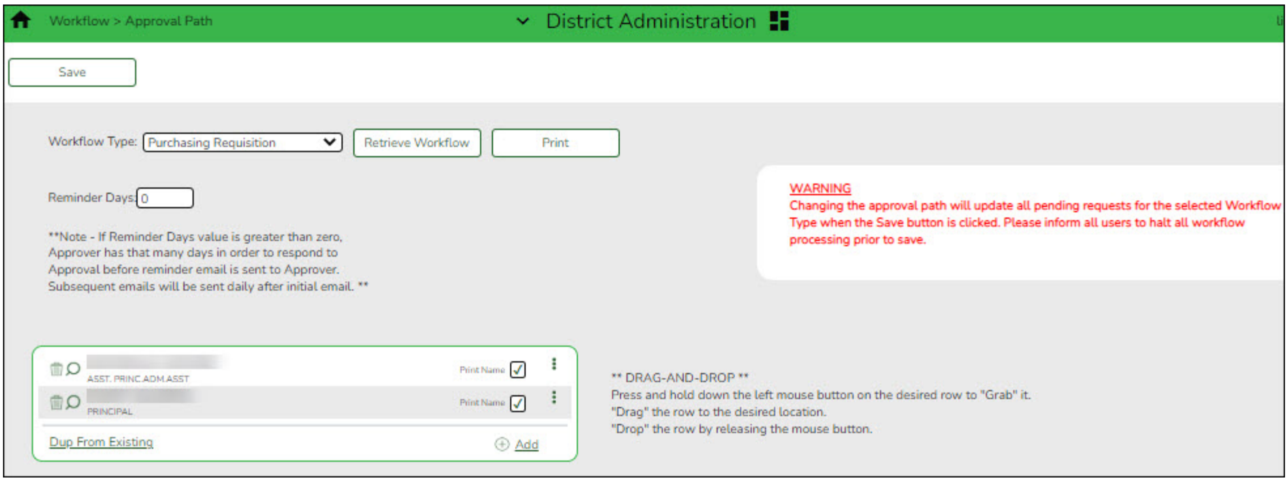
District Administration > Workflow > Approval Path

Create and maintain the sequence or hierarchy of approvers for the approval process. The order in which approvers are listed indicates the approval sequence. You can add to or edit the approval path as needed as long as the approver does not have requisitions pending their approval. If a change is made to the approval path, the change applies to all requisitions that have yet to reach that specific approver.

For the approval process, approvers **must** exist in Security Administration with an assigned employee number and have a current year payroll record.

Notes:

   - Any changes made to the approval path are immediate and automatically update (move) existing requisitions. If there are existing requisitions and you are adding a new user, first create the new user’s approval rules so that any pending items are properly moved when the user is added to the workflow.
   - The Purchasing **Cutoff Date** field on the District Administration > Options > Purchasing Options page can be used to temporarily restrict users from adding requisitions while the approval path is edited. Be sure to clear the date from the field after the approval path changes are completed.



Workflow Type: Purchasing Requisition

Reminder Days: 0

**Note - If Reminder Days value is greater than zero, Approver has that many days in order to respond to Approval before reminder email is sent to Approver. Subsequent emails will be sent daily after initial email. **

WARNING
Changing the approval path will update all pending requests for the selected Workflow Type when the Save button is clicked. Please inform all users to halt all workflow processing prior to save.

[redacted] ASST. PRINC.ADM.ASST Print Name ☑
[redacted] PRINCIPAL Print Name ☑

** DRAG-AND-DROP **
Press and hold down the left mouse button on the desired row to "Grab" it.
"Drag" the row to the desired location.
"Drop" the row by releasing the mouse button.

Workflow Type	Click ⌄ to select the Purchasing Requisition workflow.

❑ Click **Retrieve Workflow**. The selected workflow type data is displayed. If an approval path exists, the list of approvers is displayed and you can make changes as needed.

The drag-and-drop feature is available allowing you to change the order of the approval path.

Reminder Days	Type the number of days after which no action has been taken on an item, and a reminder email message should be sent to the originator and approver. By default, this field is set to zero indicating that no reminders will be sent. If this field is set to a value greater than zero, the approver has that number of days to take action on the requisition before a reminder email message is sent. After the initial reminder email message is sent, email messages are sent on a daily basis until action is taken. The number of reminder days also applies to first approvers. If all approvers in the approval path are removed, the field is reset to zero.

❑ Click **+Add** to add an approver to the approval path or click ⋮ to edit an approver. The Approver Directory is displayed.

Employee Name	The name of the selected employee ID is displayed.
Print Name	Select to print the approver's signature on the request or purchase order.

❑ Click **Save**. Depending on the change, the appropriate application message is displayed indicating the action.

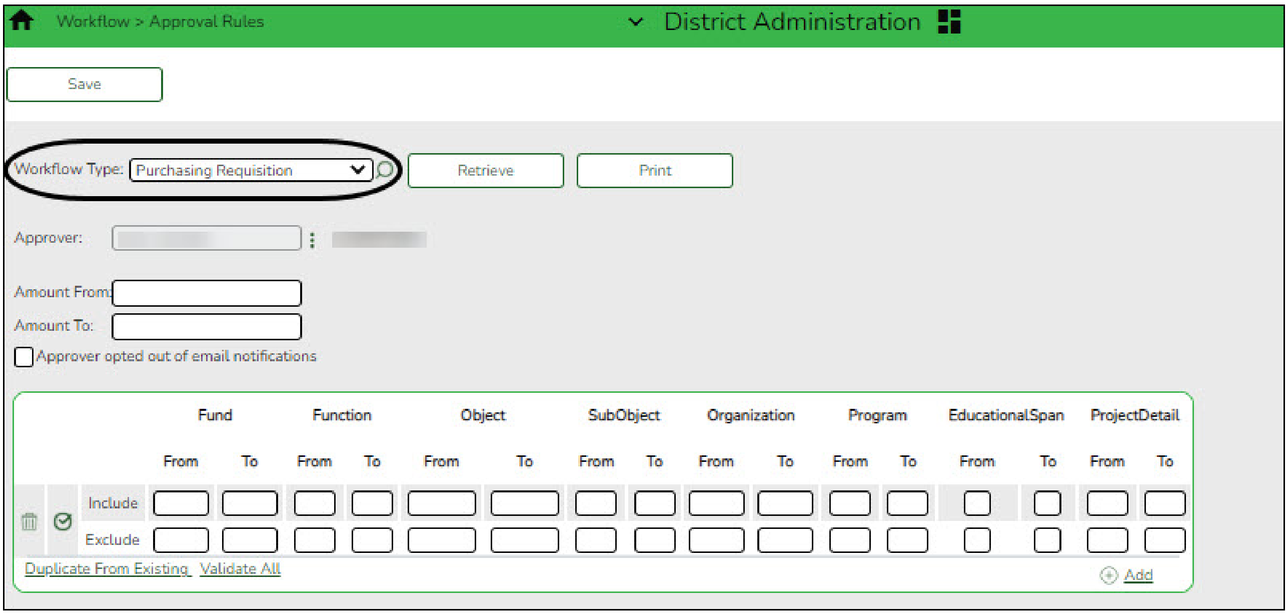
☐ Click 🔍 to display the Approval Rules page for the selected approver.

3. Establish approval rules.

Establish approval rules

District Administration > Workflow > Approval Rules

Establish account code rules for each approver in the approval path except the first approver. An approver may have multiple sets of approval rules. Approvers must have an employee number in Security Administration.


Workflow > Approval Rules
District Administration
Save
Retrieve
Print
Approver:
Amount From:
Amount To:
Approver opted out of email notifications
Fund
Function
Object
SubObject
Organization
Program
EducationalSpan
ProjectDetail
From
To
Include
Exclude
Duplicate From Existing
Validate All
Add

Workflow Type: Purchasing Requisition

Workflow Type	Click ⌄ to select the Purchasing Requisition workflow.

☐ Click ⋮ to retrieve an approver.

Amount From	Type the bypass dollar amount at which a requisition or request must be approved by the indicated approver. The amount must be entered as a whole dollar.
Amount To	Type the amount up to which the approver can approve. The amount must be entered as a whole dollar.
Approver opted out of email notifications	Select if the originator, first approver, or any approver does not want to receive email notifications.

☐ Click **+Add**. An Include and Exclude row are added.

Include	Type the valid account code components to which the selected user has permission to approve. For each account code component, type a from and/or to account code component as needed, or with the cursor in the field, press F2. If you press F2, a list of available account code components is displayed. Select the account code component from the list. Click **Cancel** to return to the Approval Rules page.
Exclude	Type the valid account code components to which the selected user does not have permission to approve. For each account code component, type a from and/or to account code component as needed, or with the cursor in the field, press F2. If you press F2, a list of available account code components is displayed. Select the account code component from the list. Click **Cancel** to return to the Approval Rules page. A complete mask should not be used as it will exclude all occurrences of that component.

Each set of **Include/Exclude** rules are evaluated independently of any other rule sets that are created.

☐ Click **Validate All** to display a detailed list of account codes that are included in each ruleset.

☐ Click **Duplicate** to copy approval rules from other users and/or applications.

☐ Click **Save**.

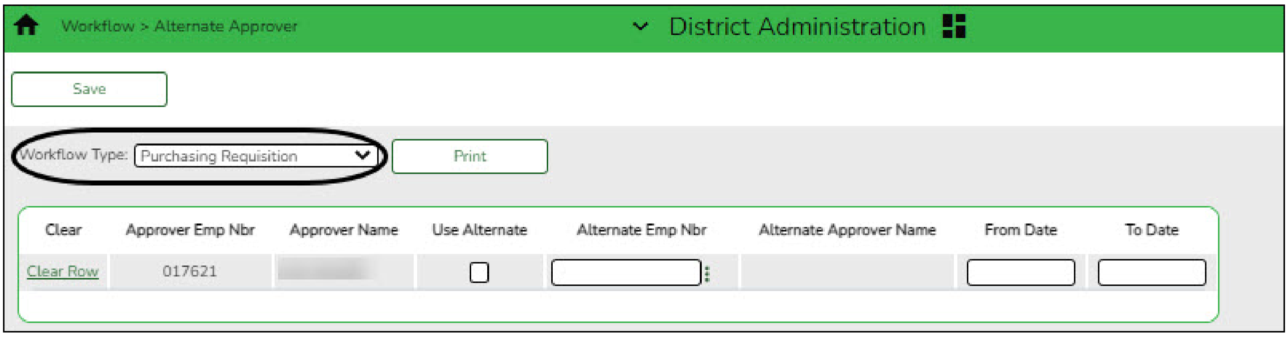
☐ Click ⚲ to display the Approval Path page.

4. Add alternate approvers.

(If necessary) Add alternate approvers

District Administration > Workflow > Alternate Approver

If an approver is unavailable to perform approval duties, you can set up an alternate approver for a specified length of time. Alternate approvers must have an employee number in Security Administration.



Workflow Type: Purchasing Requisition

Clear	Approver Emp Nbr	Approver Name	Use Alternate	Alternate Emp Nbr	Alternate Approver Name	From Date	To Date
Clear Row	017621	[redacted]	☐				

Workflow Type	Click ⌄ to select the Purchasing Requisition workflow.

A list of all available approvers is displayed.

Use Alternate	Select to create an alternative for the approver. If selected, and no date range is entered in the **From Date** and **To Date** fields, the alternate approver becomes the approver. If selected, and no date range is entered in the **From Date** and **To Date** fields, all pending requests are updated with the alternate approver for the selected original approver. If selected, and a date range is entered in the **From Date** and **To Date** fields, all pending requests are updated with the alternate approver for the selected original approver if today's date falls on or between the from and to dates. If selected, and a date range is entered in the **From Date** and **To Date** fields, and today's date is outside of the from and to date range, no updates occur for the selected original approver. If not selected, and/or a date range is entered in the **From Date** and **To Date** fields, no updates occur for the selected original approver. If selected, and then cleared, the alternate approver for all pending requests reverts to the original approver and an email message is sent to the original approver. This includes updating the workflow datetimestamp to today's date to reset the reminder days for the original approver.
Alternate Emp Nbr	Type an employee number or click ⋮ to select one from the Approver Directory.
From Date	Select a date from the calendar on which the selected employee will begin serving as the alternate approver.
To Date	Select a date from the calendar on which the selected employee will end serving as the alternate approver.

☐ Click **Save**.