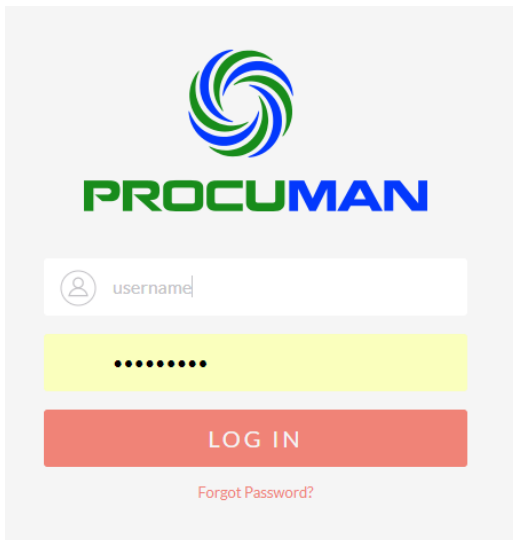


Requisitions and Approvals End User Guide

v1.1

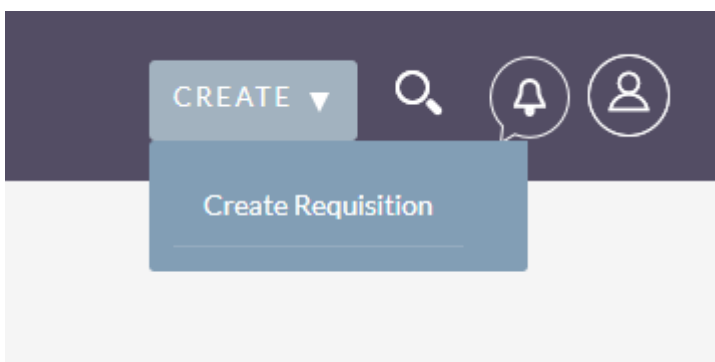
1. Creating a Purchase Request

Logon to the procuman software at website <https://xxx.procuman.net> where xxx is your company name. Your username and password will be given to you by your local procurement software administrator. If you forgot your password, you can reset your password by clicking the „Forgot Password?“- link.



Purchase Requisition

Purchase Requests can be created by navigating to the menu item Create → Create Requisitions.



Fill in the form. Mandatory fields are marked with *.

If the „Assigned Approver“ is not the correct approver then change it by selecting a new approver with the popup lookup  button.

CREATE

SAVE CANCEL

BASIC

Assigned Approver/Editor: ① Emily Cheng [clear] [delete]

Department: [clear] [delete]

Requisition Description: * [text area]

Justification: * [text area]

Cost Center: CC200 [clear] [delete]

Requested Total Cost: * [text area]

Project: [clear] [delete]

Requested For: Jack Wong

Delivery to Branch: [clear] [delete]

Date Required: [clear] [calendar]

Remarks: [text area]

Line Items: [add]

Line	Product Name
1	[clear] [clear] [delete]

If you want to save the Request as Draft and not to submit it for approval process, then change the „Assigned Approvar/Editor“ for your own name. Later when you are ready to submit the requisition for approval, change the „Assigned Approvar/Editor“ to be your approving manager.

Cost Center field is automaticly populated from your employee master data.

The „Requested Total Cost“ amount is calculated in your company default purchasing currency only if all line items are of the same default currency. Note that products selected from the catalogue may be in different currencies and in this case the „Requested Total Cost“ needs to be calculated manually. Enter the „Justification“ for the purchase. Change the „Requested For“-field if the purchase is done on behalf of another person.

Select the delivery destination of the goods in field „Delivery to Branch“ if the default value is not the correct delivery location.

In the „Line Items“-section, select the required products from the product catalogue in the „Product Name“ field. Use the „%“ character in search field to be a wildcard. If the product is not in catalogue then use the alternative „Product Name“ text field to write the name of the requested product.

You can add several Line Items by pressing the button.



Press „Save“ to submit the Purchase Requisition for the Approving Manager. After submitting the request, the requestor will not be able to change the request unless the Approving Manager assigns the Request back to the Requestor or if the request has been saved as Draft by selecting the requestors own name as the „Assigned Approver/Editor“.

The status of the request can be seen in the list of Purchase Requisitions.

PURCHASE REQUISITIONS							
Requisition ID Name	Requisition Description	Assigned Approver/Editor	Requested For	Status	Date Required	Date Created	Created By
<input type="checkbox"/> REQ0082	New Laptop	Emily Cheng	Jack Wong	Sent for Approval		08/15/2017 10:01am	jack
<input type="checkbox"/> REQ0081	New PC	Emily Cheng	Jack Wong	Approved		08/15/2017 08:16am	jack
<input type="checkbox"/> REQ0080	Microsoft Power BI subscription	Albert Lee	Jack Wong	Approved	07/12/2017	07/07/2017 06:01pm	jack
<input type="checkbox"/> REQ0076	New Ford Focus	Albert Lee	Jack Wong	Approved		05/02/2017 10:34am	jack

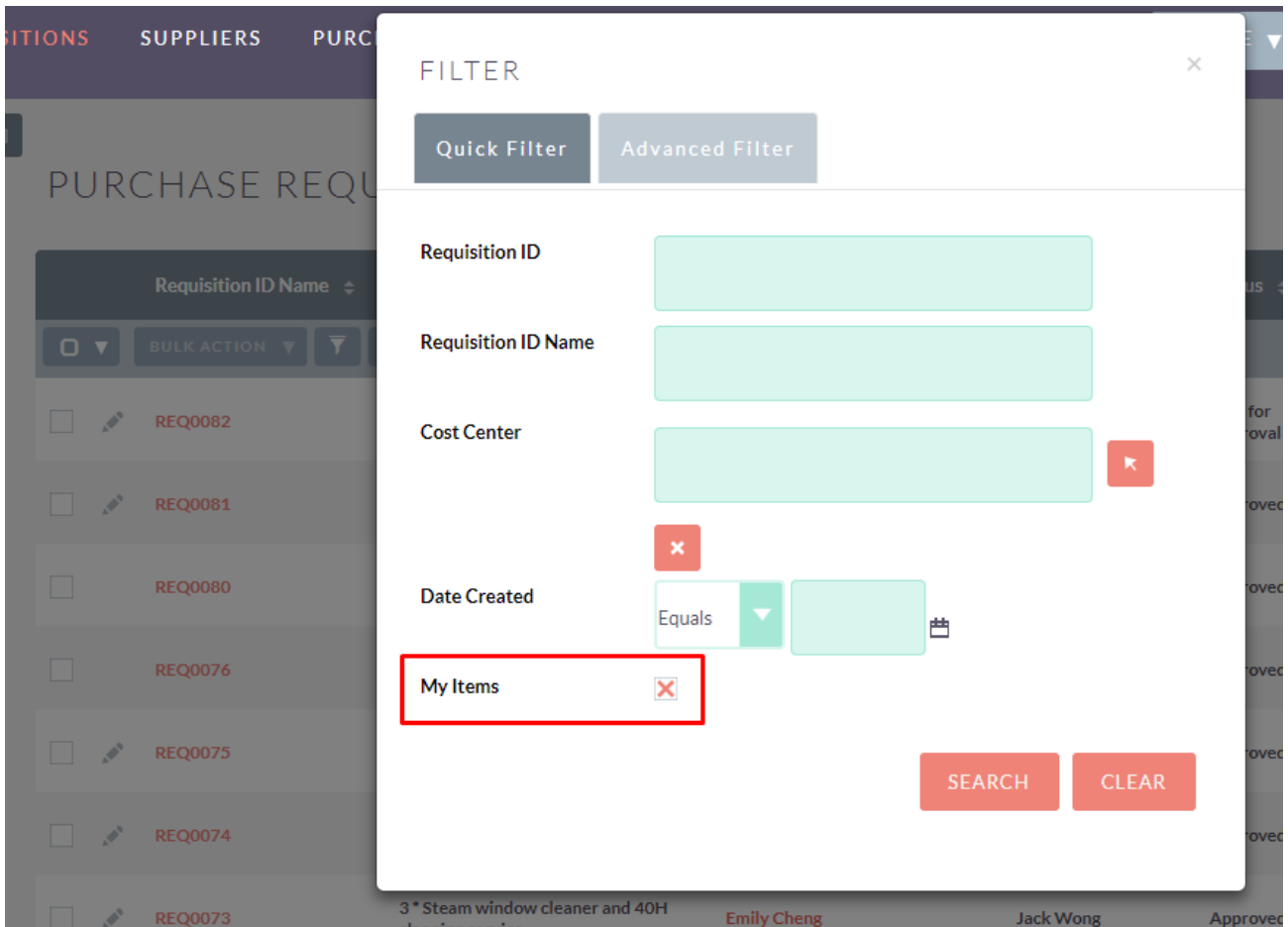
2. Approvals

Note: Approvals section is only visible for users in Approvers group

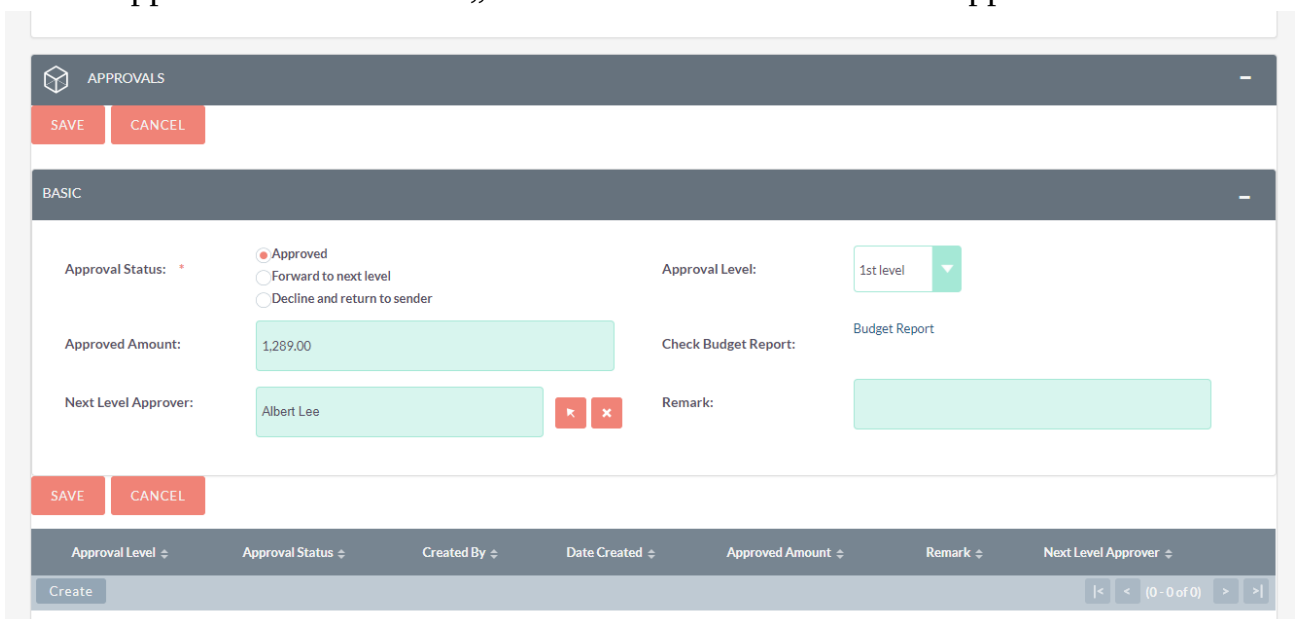
The requisition is first sent to the selected approving manager by the requestor. Email will be automatically sent to the Approving Manager. She/he will then create approval record in the “Approvals”-section in the “Purchase Requests”-module’s record details view. Request can then be further sent to “Next Level Approver” by the first level approving manager.

Employee master data „Reports To“-field is the default next level manager value for Request Approver. The employee master data „Approval limit“-field for the approving manager is used to validate the approval against the „Requested Total Cost“-field. Error will be displayed if Total Cost exceeds the approval limit.

Approving manager can search the Requisitions that require Approvals with the list „Filters“. Use the filter „My Items“ to see requisitions assign to you.



In the Requisition record detailed view (not edit view) the Approver will see a section called Approvals. Click on the „Create“-button to create a new approval record.



Then select the Approval status and Amount approved. If required select a next level approving manager.

Next Level Manager will automatically receive an email for the required approval task if option „Forward to next level“ is selected. After final approval email is sent to the Purchasing Agents group and to the original requestor.

Approval Level	Approval Status	Created By	Date Created	Approved Amount	Remark	Next Level Approver
1st level	Approved	emily	08/15/2017 06:17am	1,289.00		Emily Cheng