

Purchase Requests Table

Purchase Requests are used to enable an end user to request new equipment, software, or furniture. A single purchase request can include multiple requested items, which are selected from a list of available items.

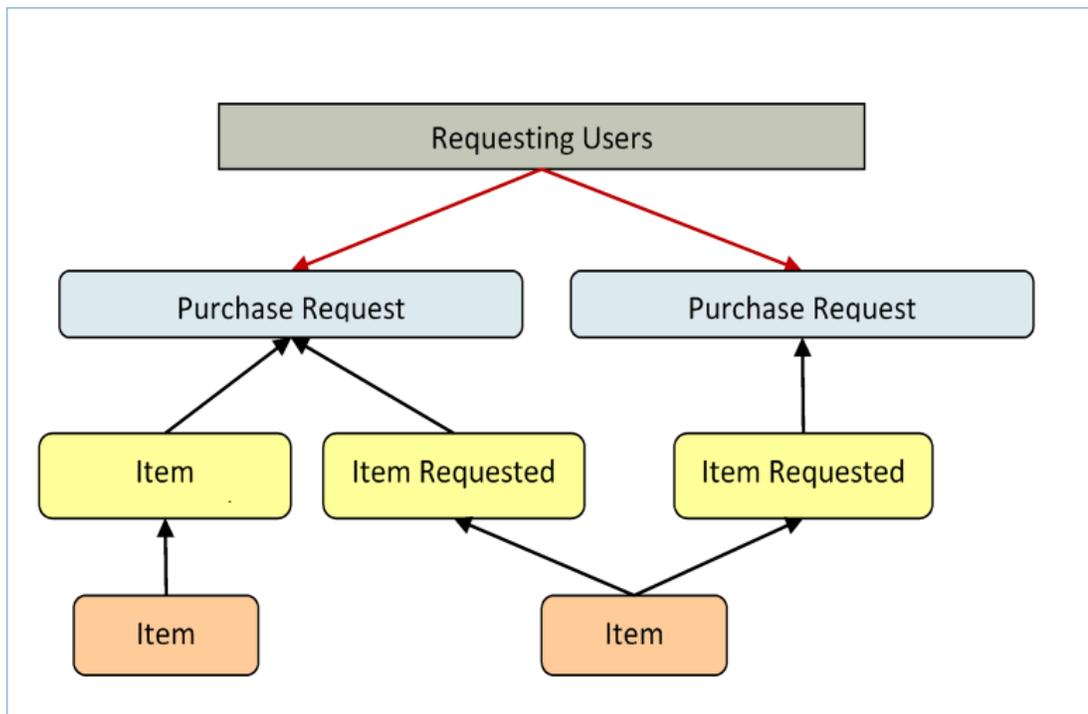
Example Use case

An employee end-user needs a new laptop. The user logs in and creates a new Purchase Request from the end user interface (EUI). They specify who it's for, the type of purchase by Service Category, the business justification for the request, etc. Lastly they select the item(s) they are requesting via a Related Table to the [Items Requested](#) table, which in turn draws from the [Items](#) table. The user may also select from Assets in stock that matches the type of purchase they chose.

The end user's manager, receives an email that a new request needs approval. The manager can approve or reject directly from hotlinks in the email or edit the record manually from the power user interface. As a supervisor, the manager changes the Supervisor Approved field to either Yes or No. A rule running on edits will then change the status to Supervisor Approved or Supervisor Rejected. If the request is approved, a notification will be sent to the Purchasing Team.

Members of the Procurement Team receive an email stating that a new Purchase Request is awaiting their approval. Members of the Procurement Group will see some additional fields in the Purchase Request record, including a Procurement Group Approved field similar in function to the Supervisor Approved field. They will also see another Yes/No choice field called "All Items Received?" When the recipient/requestor has been satisfied, the Procurement Group changes the status to Fulfilled.

Relationship Diagram



Record Creation

Internal customers can create Purchase Requests from the EUI. Members of the Purchasing team can create records on behalf of other users.

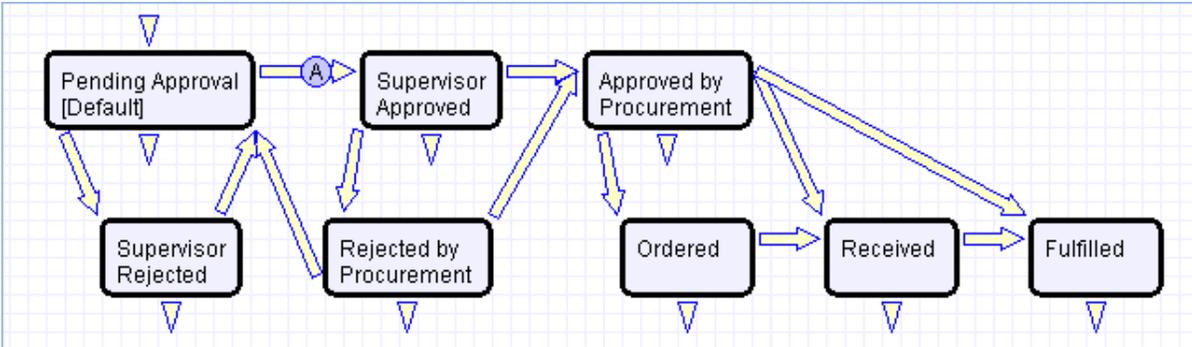
Upon creation, a rule sends emails to the Requestor the Requestor's Supervisor, and the Purchasing Team notifying them of the new Purchase Request.

Processing of Records

Once created, Purchase Requests follow a two-stage approval process. The creation emails sent to the Requestor's Manager and the Purchasing Team lets them know that their approval is required and provides a link in the email to edit the record. A supervisor can edit the Supervisor Approved? field to yes or no, and the Purchasing Team edits the Procurement Group Approved field to yes or no. Rules validate these changes and move the Purchase Request to the appropriate status, such as Supervisor Approved when the supervisor changes the field to Yes.

Once fully approved, Purchase Requests are Ordered, Received, and Fulfilled. Ordered and Received are used if the requested items are not immediately available, and changing the All Items Received? field to Yes will move the request into the status of Received. Purchase Requests can move to a status of Fulfilled any time after approval.

Workflow



Purchase Requests have a two-stage approval process, first by the Supervisor and secondly by Procurement staff. Once approved, Purchase Requests can move to Ordered/Received states or directly to Fulfilled.

Ownership

Purchase Requests are owned by the user whose Login matches the Creator Login field in the Purchase Request.