Burrell College of Osteopathic Medicine

Purchase Requisition Approval Process

using e-Requester

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e-Requester

(Fraxion)

Introduction

e-Requester is a web-based purchasing application that enables employees to create purchase requests, submit them for approval, and generate Purchase Orders.

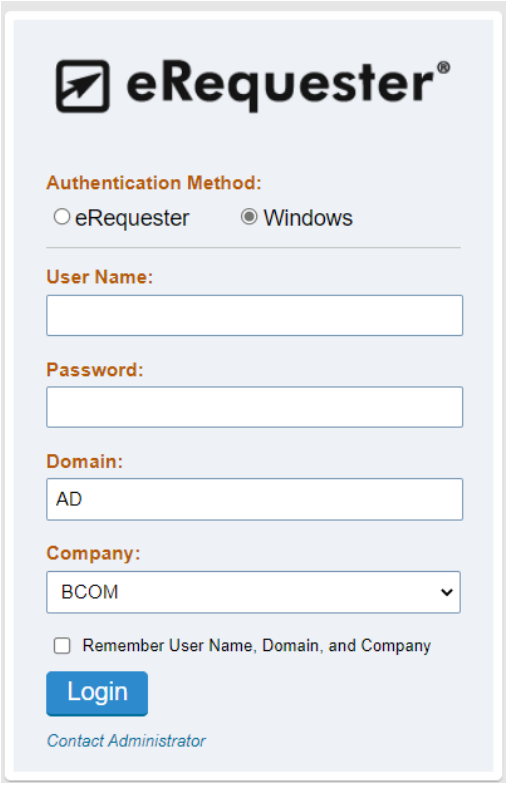
Logging In

There are a couple of ways you can approve a purchase requisition.

1. With the Email Approval module, approvers can take approval actions directly from their email inbox by replying directly to “Approval Required” email notification.
2. With the Mobile Approval module, approvers can take approve on the go.
3. With Quick Links on the Burrell College webpage and select e-Requester.

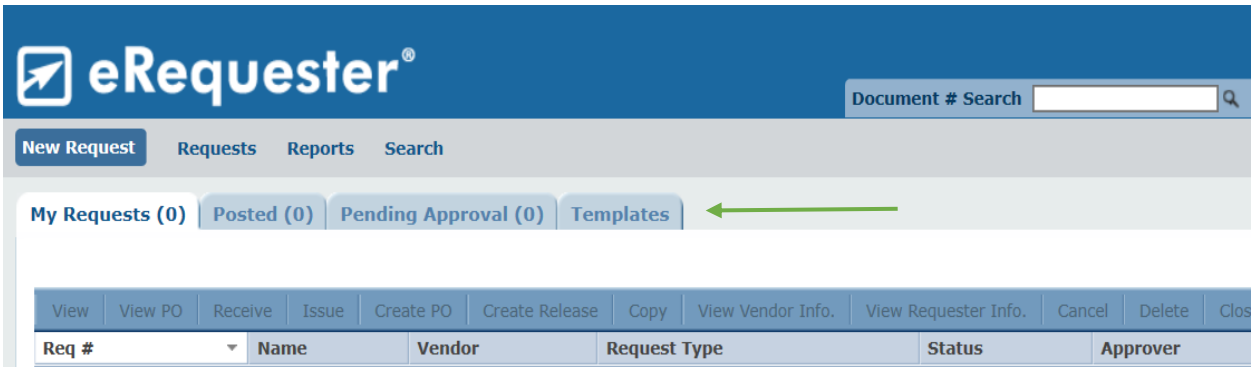
   It should look something like the following image. Select Windows under Authentication Method.

   Enter your User Name and Password. Click on Login.



e-Requester Dashboard

Once you have logged in, you will be taken to e-Requester's Dashboard. The Dashboard is where you will be provided with a quick overview of active requests that fall within your preview based on the configuration of your User Profile. It consists of up to 4 tabs, each of which will contain a group of requests at a similar point in their lifecycle.



The main Dashboard tabs are:

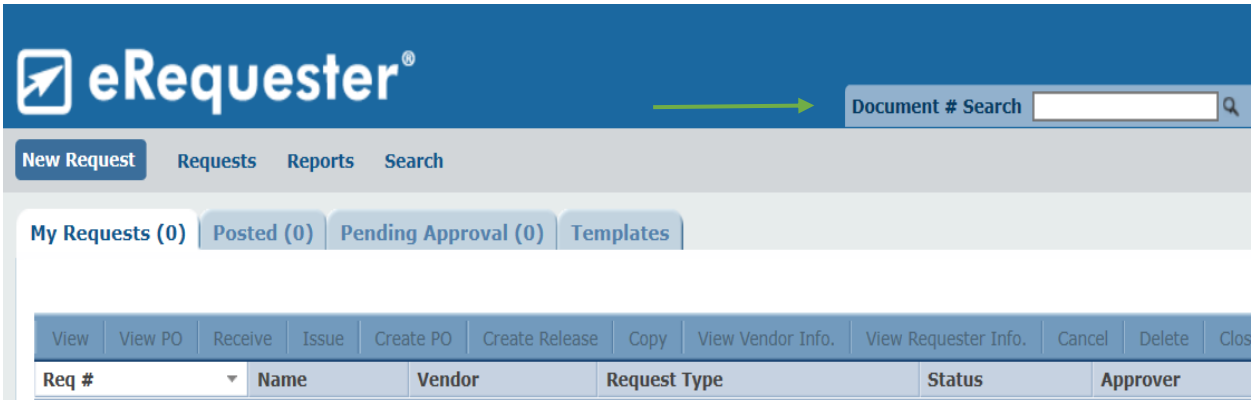
1. **My Requests**: All your requests will appear here until the Purchasing Tech – (Peggy Ortega) creates the Purchase Order.
2. **Posted:** The "Posted" tab will show all of your requests that have an assigned Purchase Order Number
3. **Pending Approval:** Requests that are awaiting approval. If you are not an approver, you will still see the "Pending Approval" tab but the count will always show 0.
4. **Templates:** Requests that have been saved as a personal template or a shared template from your request department(s). Templates allow for easier duplication later, such as regular monthly supply orders.

Navigating e-Requester

In addition to the Dashboard tabs, you can also see e-Requester's main Navigation Pane near the top of any given page:

Mouse over “Requests” to see a drop-down menu of options. These options will be identical to your user’s Dashboard tabs.

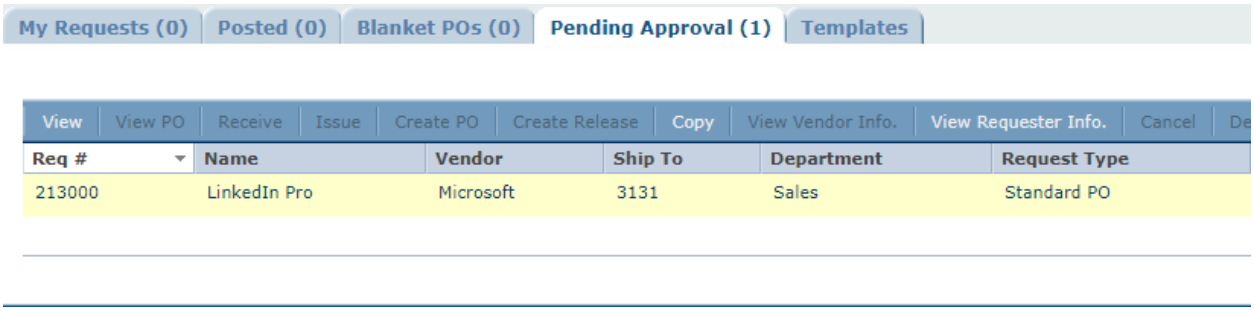
You may also search for requests in the system by clicking the “Search” link, which should be the link furthest from the left on the Navigation Pane. Depending on your rights as a user, some options may be available and others may not.



Approval Process Within e-Requester

Once a request has been submitted and every time it advances in the Approval Sequence, all users whose approval is required will receive an email notification letting them know that approval actions is required on their part.

You can also see how many requests are waiting for your approval by navigating to the "Pending Approval" Dashboard tab. This tab also provides an overview of the information contained in each request.



Organizing the Pending Approval Tab

Users can reorder the "Pending Approval" tab in two ways:

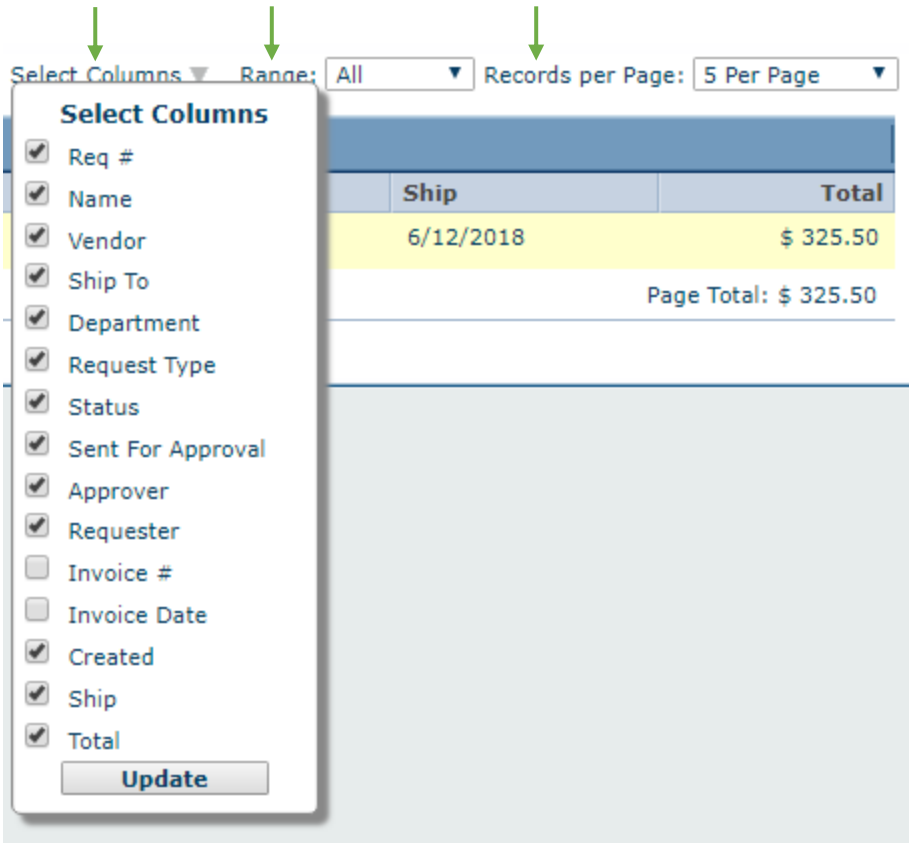
The first way is to click on any of the request information columns (like "Req #", "Name," or "Vendor") to sort all of the requests by that column. The header for the active sorting column will be indicated by a white rather than blue background (see the "Req #" column header in above figure). A down arrow (▼) to the right of the column header text indicates the column is being sorted in descending order (highest first), and an up arrow (▲) indicates the column is being sorted in ascending order (lowest first).

The second way is to drag and drop any of columns (except Req # and Total) to change the order in which they are arranged, so you can see the information most important to you first.

Filtering the Pending Approval Tab

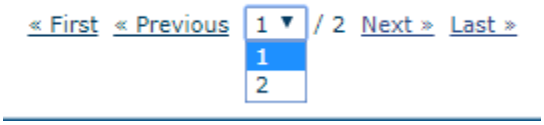
In the upper-right corner of the "Pending Approval" tab you can see some options which will allow you to control what information you do and do not see.

A. The "Select Columns" option can be used to show or hide columns from the tab. Just deselect the columns you wish to hide and click "Update" to apply the changes.
B. The "Range" dropdown list can be used to restrict the requests displayed to those within a certain date range (such as the last month).
C. The "Records per Page" dropdown list can be used to show a greater or smaller number of requests per page.



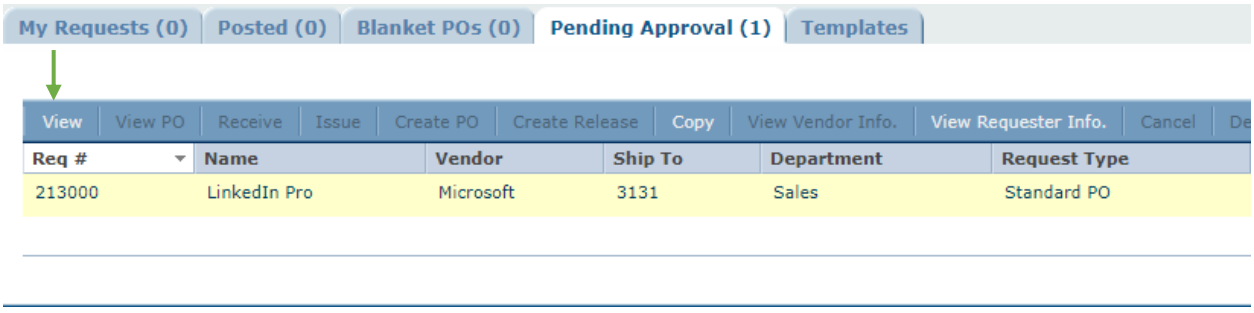
Switching Pages

If there are multiple pages of requests, you can use the links at the bottom right of the page (below "Page Total") to switch between them or use the dropdown menu to select the page you want.



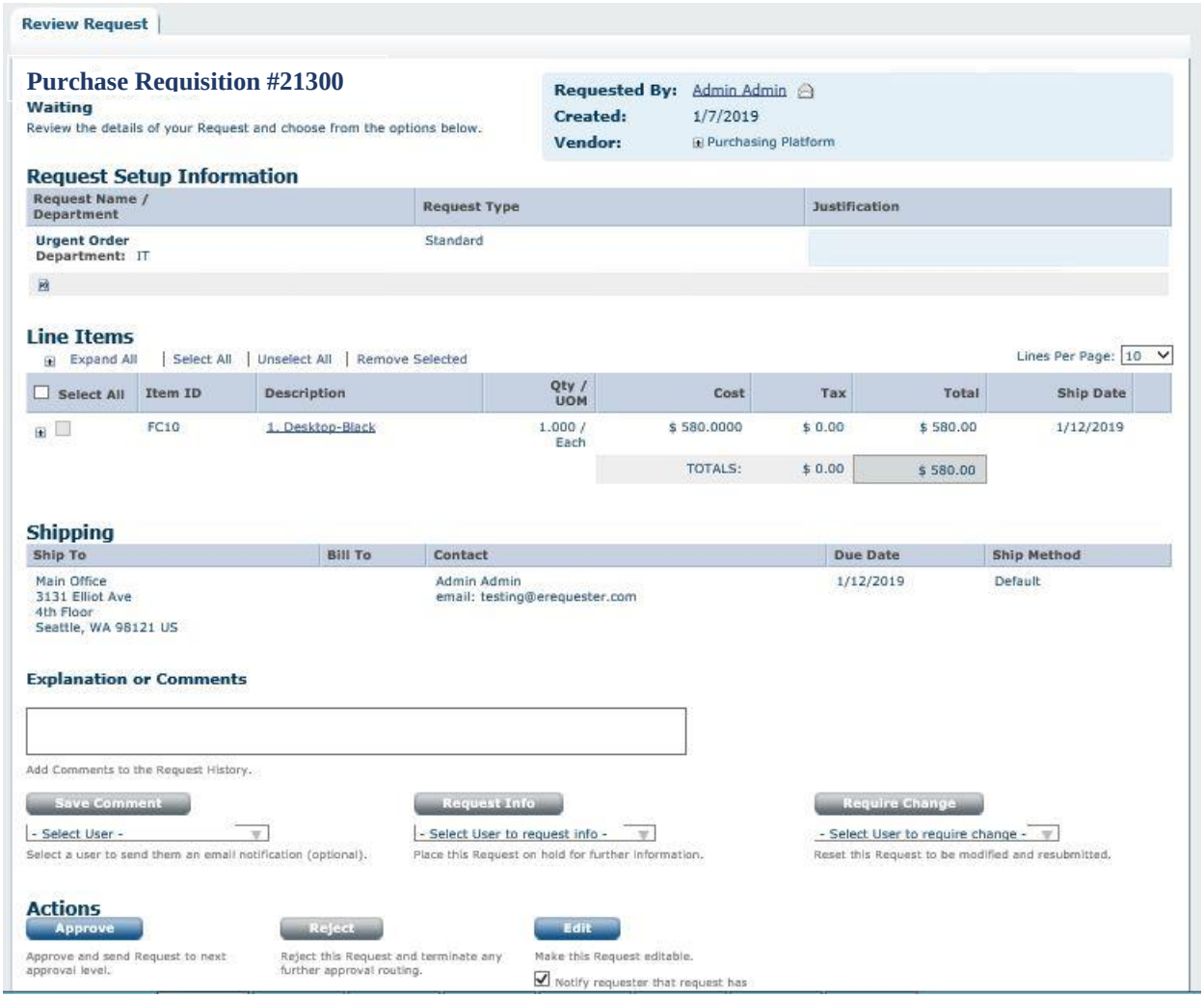
Reviewing a Request

You can find out more about a request by selecting the request and clicking the "View" link on the toolbar, or by double clicking any of the request's details on the "Pending Approval" page.



When you click the “View” button on the dashboard, you will be taken to the “Review Request” page for the highlighted request. This page contains all of the information regarding the request and provide the active Approver with the Approval Action buttons.

Any “+” symbol can be clicked on to expand that part of the page for more information. If you scroll down on the “Review Request” page, you will see the “Request History” and “Approval Routing” sections.



Request History

The "Request History" shows the full history of a request, including whether it was copied from another request, when it was created and submitted, who approved it, and any notes that have been added.

Approval Routing

The "Approval Routing" section shows what approval a request needs before it is fully approved. The current approver for a request will show as "Pending" and future approvers will show as "Not Notified" as it is not yet their turn to approve (you could decide to reject the requisition, stopping it from progressing to them.) Before the request is fully approved, any previous approvers will show up here with a status of "Approved."

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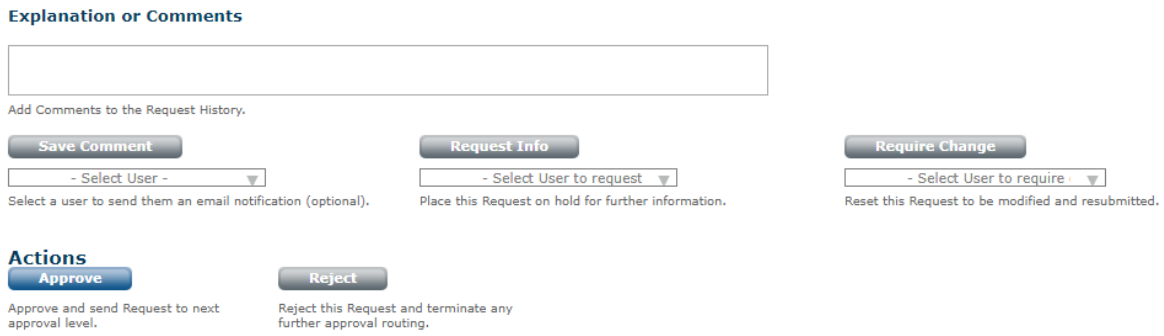


Below the request's Shipping/Line Item subsections and above the "Request History" subsection, the active approver will see several buttons which will trigger various actions they may take on the request. In order to take any action besides "Approve", you must add a comment to the request in the "Explanation or Comments" box. Once text has been entered in this box, the buttons' color will change from grey to blue to indicate that they are now available.

What follows is a breakdown of what each of these buttons do and how to use them.

Save Comment

Approvers have the ability to type in a comment to add it to the "Request History" section. To do so, just type some text into the "Explanation or Comments" text box, and when you are ready to add the comment, click "Save Comment."

By default, whenever a comment is added, the requester, all approvers, and Purchase Technician will automatically get notified. However, the approver can also use the dropdown list below the "Save Comment" button to select an additional user to be notified. All active e-Requester users in the present company will appear in this list.

***Please Note*:** The Save Comment action does **NOT** change the approval status of the request. It will not advance the request to the next Approval node.

Request Info

To enable this option, type some text indicating the information you need in the "Explanation or Comments" box, then select a user from the dropdown below the "Request Info" button.

Any active user within the present company may be selected for the "Request Info" action. This selected user will receive an email letting them know you need information from them, set the request status to "Request Info", and move the request to their "My Requests" dashboard tab. They can then save a comment to the request, and it will be submitted back to you for your approval.

Request Change

To enable this option, type a summary of what needs to change in the "Explanation or Comments" text box, then select a user from the "Require Change" dropdown. Only the original requester and previous approvers will appear on this list.

Using this action will update the request status to "Require Change" and assign it to the user you selected. The selected user will receive an email letting them know a change must be made against the request and will be able to edit the request and resubmit it for approval based on the request's edited details.

Approve

This option does not require a comment, though you may enter one if you like. If you are **not** the final approver, it will advance the request to the next approval sequence, and, depending on user settings, may notify them to let them know you approved the request. You should only approve when you are satisfied that the request should continue — otherwise, consider using the "Request Info" or "Require Change" options.

Reject

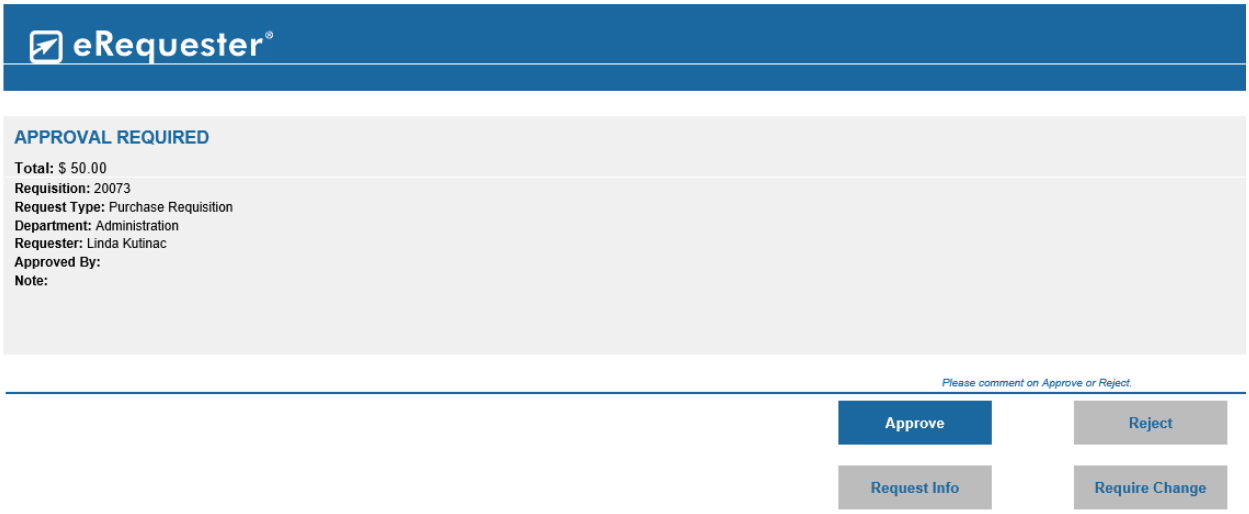
Use this action with CAUTION as rejecting a request effectively "kills" it, making the request unavailable for any editing or future approvals.

To enable this option, type an explanation of why the request is being rejected in the “Explanation or Comments” box.

Once this action is used, the request will be rejected and closed, and the original requester will be notified that the request has been rejected. **Rejection is final**. There is no way to resubmit a rejected request for approval again. However, in the case of an accidental rejection, the request **can** be copied and a new request generated from it.

Email Approval Module

As an approver, you will receive an email from e-Requester notifying you a request needs your action. You can click on the link provided on the email and it will take you to the system (e-Requester). You can review the request directly from this email, more detail is provided on the body.



You can approve, reject, request info or require change from this notification without needing to log in to e-Requester. If attachments were provided those will be available.

Note: the system will detect if user is logging in through a mobile or computer device. If logging in through a mobile device it will automatically give users a mobile interface.

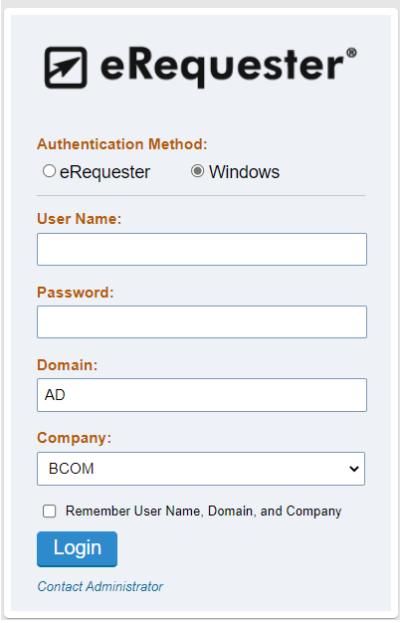
Note: if using an apple product, DO NOT use the buttons when approving, rejecting or requesting info or require change. Instead use the **REPLY** action on the email and manually type in the required text in the body.

Mobile Approval Module

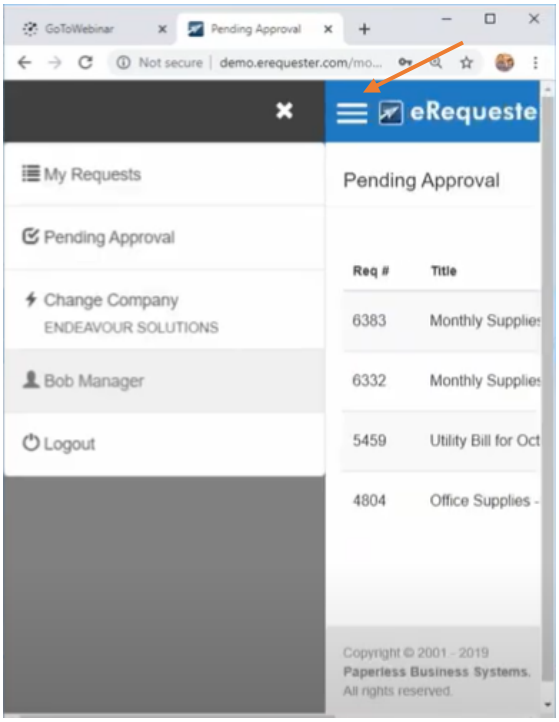
As an approver, you can access the mobile approval module by following the link on your email.

It should look something like the following image. Select Windows under Authentication Method.

Enter your User Name and Password. Click on Login.

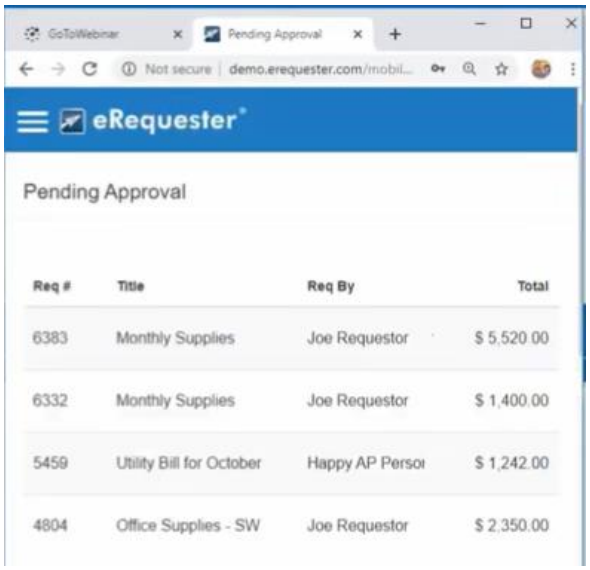


Once you log in, you can review the requisitions by clicking on these three lines, this will take you to the Pending Approval tab.

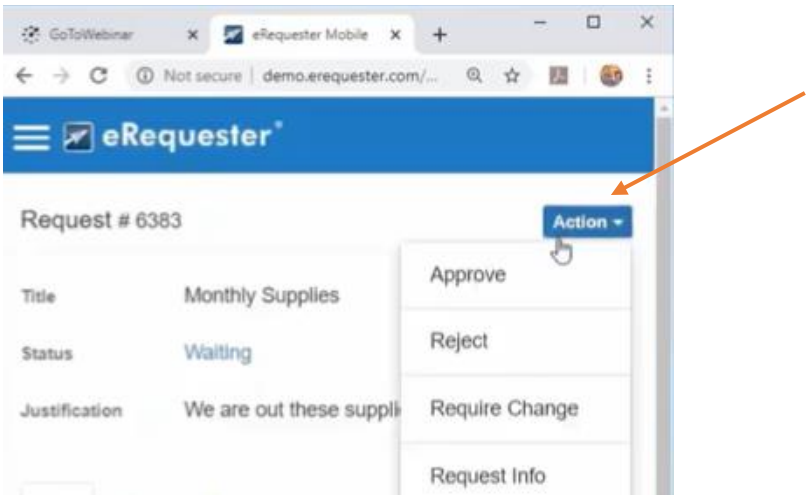


Pending Approval tab

You will see all the requisitions that need your action. You can click on the requisition and drill down to the item detail. If attachments were provided those will be available.



Click on Action to select approve, reject, require change or request info.



After approval is complete, Purchasing Tech will receive an email notification that the request has been approved. A purchase order will be generated and will proceed with the ordering process.