

Approval Process Overview



Approval Roles in **Guided BUYing**



The automated approval process in **Guided BUYing** maximizes efficiency, standardizes processes, and ensures transparency.

The approval workflow for each Purchase Request (PR) is automatically determined by **Guided BUYing** based on multiple factors such as the requisition value, category, type of purchase, organizational and cost center information located in SAP.

Three Main Approval Roles



Requisitioner

Requisitioners are responsible for creating, submitting, and modifying the PR. Required approvers are added automatically to a request when submitted. However, requestors may add watchers and additional approvers as necessary.



Approver

An Approver is someone who is required to approve a document before it can move forward. Approvers receive notifications by email when a PR requires their review. Each approver is notified only after the approvers to the left on the approval flow have approved the document.



Watcher

A Watcher is someone who is notified of the submission and status of an approvable document, but does not have approval authority. For example, when a Requisitioner creates a PR on behalf of a user, that user becomes a watcher.

Approval Flow Overview

Each approver involved in the approval flow of a PR will appear in the approval flow. Each approver will appear sequentially along the workflow line. Those in green, have completed their task; those in blue currently have the task assigned to them followed by a dotted line indicating the next steps. This approval flow can be viewed in the PR on **Guided BUYing** by clicking the PR and scrolling to the Approval Workflow.



A status of Active, means that the Approver has received notification of the request for approval but has not acted on the request. In the above case, a Buyer in Business and Site Services has approved the request and Dawna Johnson has received notification but has yet to approve.

Approval Thresholds

PRs and Invoices in **Guided BUYing** will go through a series of approvals based on the dollar amount and commodity code.

Purchase Requisition Approval Threshold	
Dollar Amount	Required Approvers
Any Dollar Amount	<ul style="list-style-type: none">• Functional Approver*, if applicable
≥\$500	<ul style="list-style-type: none">• Departmental Financial Approver
≥\$5,000	<ul style="list-style-type: none">• Property Management
≥\$10,000	<ul style="list-style-type: none">• Sourcing & Procurement

Invoice Approval Threshold	
Dollar Amount	Required Approvers
<\$5,000	No approval required. Requisitioner notified as a watcher
≥\$5,000	Requisitioner

Adding and Removing Approvers

System generated approvers will be added to PRs based on commodity code and dollar amount and cannot be removed. Requisitioners and approvers can add and remove additional approvers and watchers to the PR.



System Generated Approvers

Guided BUYing assigns approvers automatically based on the commodity code, dollar amount, and cost center. These system generated approvers cannot be removed.



Adding Approvers

Requisitioners may add additional approvers as necessary. However, this may lengthen the time it takes for the PR to be fully approved.



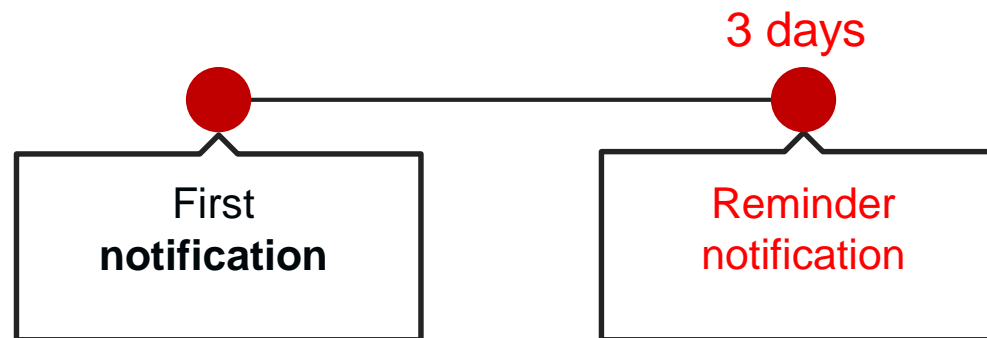
Removing Approvers

Requisitioners and approvers may remove manually added approvers from the approval flow.

Approval Timelines

Guided BUying sends notifications in the approval process to reduce approval lead-time and support business continuity.

Notification	The approver is notified when the PR is ready for review.
Reminder	If no action is taken in three days, a reminder notification is sent.



Approval Platforms

Approvers have the option of approving or denying a PR via email, within the **Guided BUYing** tool, or through the mobile application.



Email

Approvers will receive an email notification with a link to review and either approve and deny the PR in **Guided BUYing**.



Guided **BUYing**

Access **Guided BUYing** through single sign-on from your laptop or desktop.



Guided **BUYing** Mobile App

Access the **Guided BUYing** mobile application on your Apple or Android smart phones for on-the-go approving.