Purchase Requisition App User Guide

This guide provides instructions for submitting, reviewing and approving purchase requisitions. For guidance on purchasing policies and procedures please refer to Purchasing Overview and/or the CSU Purchasing Manual.

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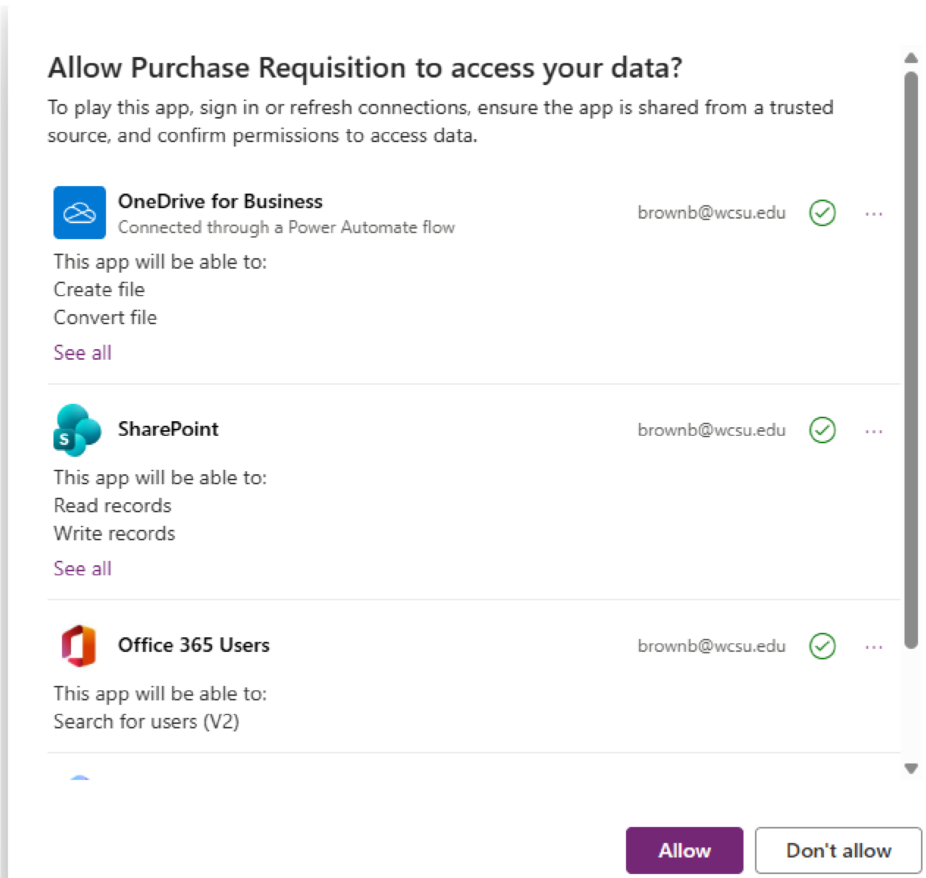
Purchase Requisition App Overview

Opening the App

Link: Purchase Requisition App

Permissions

The first time the app is opened (and anytime an update is published), Power Apps will display a list of the Office 365 components that will use the current user's credentials:



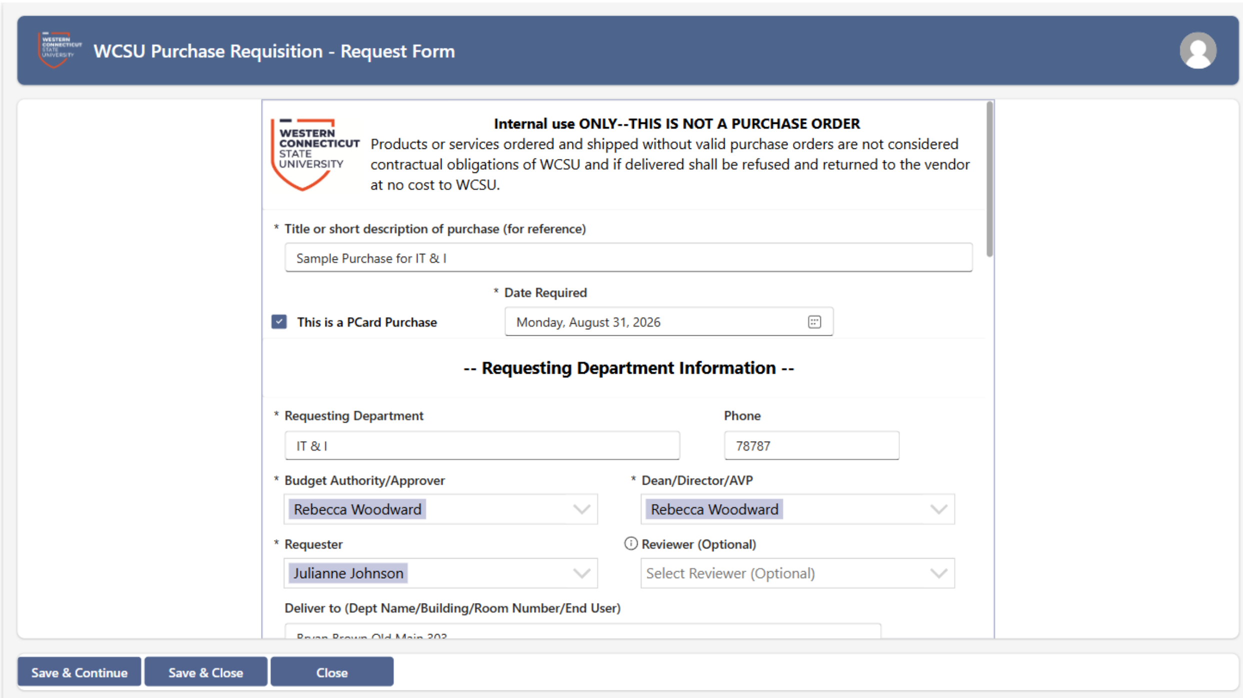
The app uses the current user's credentials to perform operations such as sending email notifications and saving request data to SharePoint. Click **Allow** to proceed to the app.

Note: if Allow is disabled, scroll through the list and click **Refresh Connection** (or Repair Connection) on any items displaying an error message. Once connections are refreshed, the Allow button will become enabled.

Creating a New Request

From the Home screen, click **Create a New Request**

Screen 1 - Department & Vendor Information



All fields marked with an asterisk * are required.

P-Card Purchase: P-Card purchases require approval, check this box if applicable.

Budget Authority, Dean/Director/AVP, Requester: These fields are required. If the same person has multiple roles (i.e., Budget Authority is also the Dean), they need to be added to each role and will approve on multiple lines. If a request requires additional approval (i.e., from the President or Provost), the app will automatically add them to the approval workflow.

Reviewer: The Reviewer is an optional person who can view and edit the request before signatures are collected.

Change Order Request: Provide the PO # of the order that is being modified, if applicable

Contract Award Number: The Purchasing Department can assist and provide this information if purchase is part of an existing contract.

Internal Requisition Number: Used by departments who use another system to track requisitions.

Vendor Information: Only Vendor Name is required, however, provide as much information as possible. If a request requires competitive pricing, provide additional vendor information.

Attachments: Attach all supporting documents such as quotes, invoices, contracts, etc.

The initial information on this screen must be saved but the additional screens can be completed later, if necessary, once the initial information is saved.

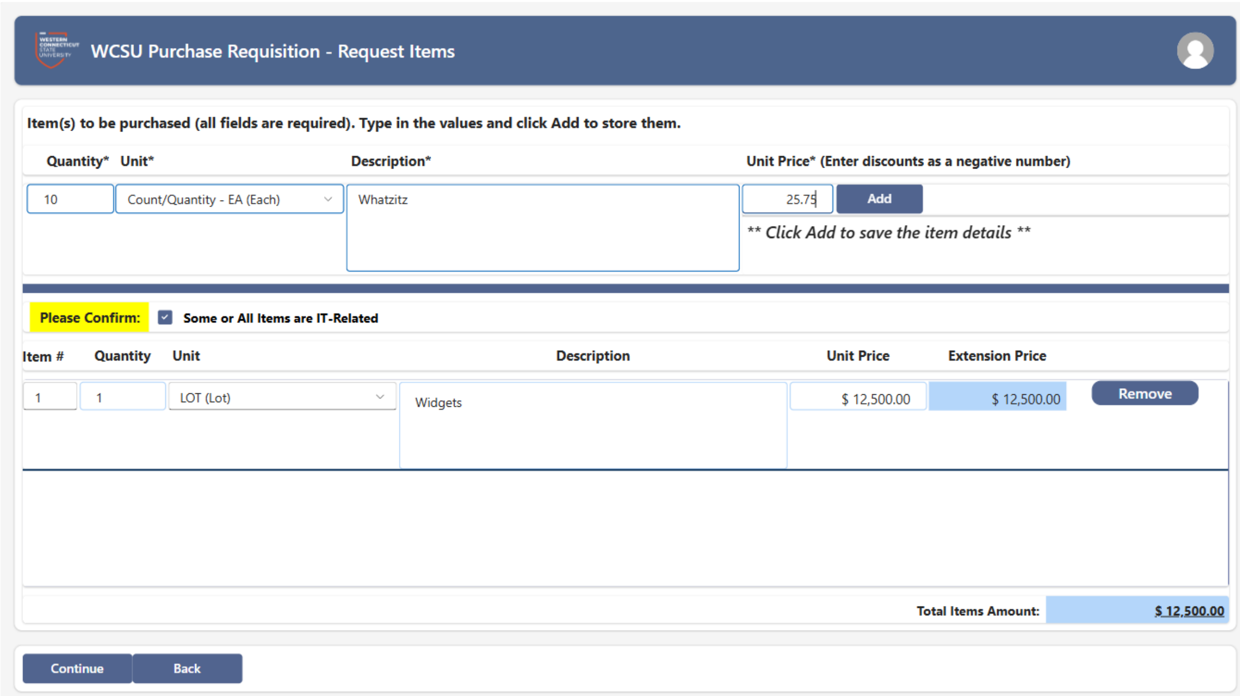
The button options on this screen are:

Save & Continue: Submits the form and continues to the Request Items screen

Save & Close: Submits the form and returns to the **Home** screen. The request has a status of 'New,' and the rest of the form can be completed later.

Cancel (new forms) or Close (existing forms): Closes the current form without saving any changes.

Screen 2 - Request Items

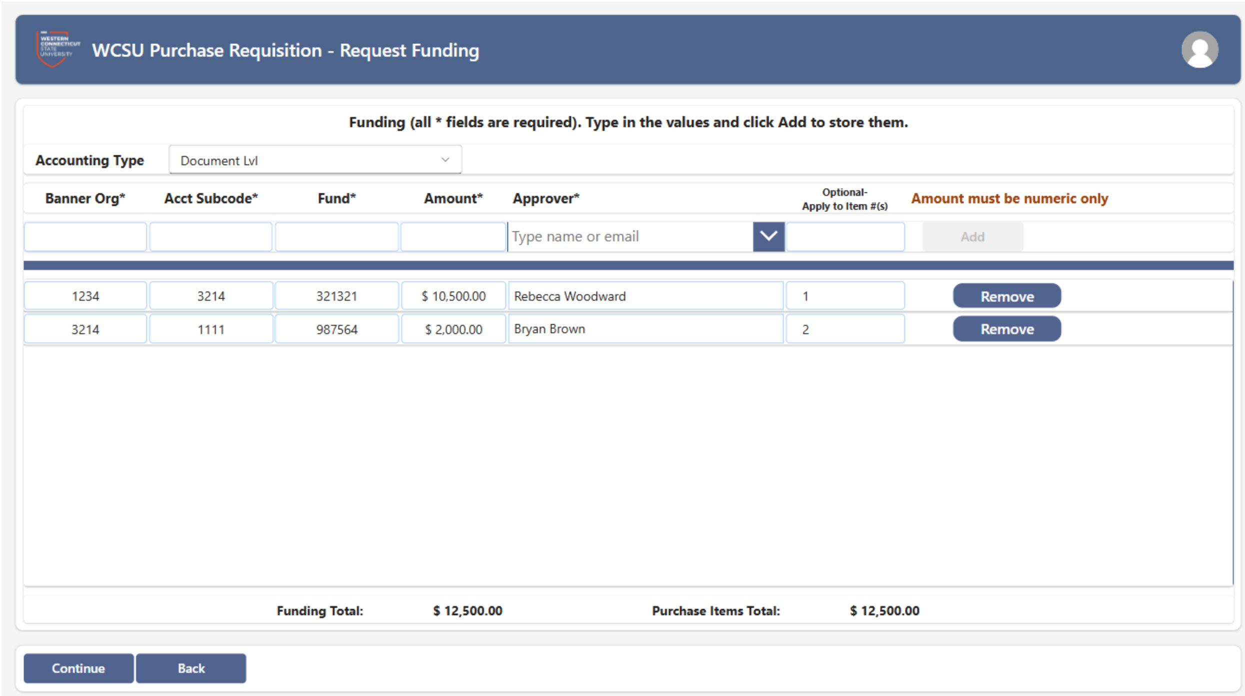


Items are added using the top portion of the form. All fields are required; once all item information is entered the **Add** button will become enabled.

Clicking **Add** will save the item detail to the list on the bottom portion of the screen. Item details can be edited directly on the list. Items can also be removed if necessary.

IT-Related Items: check the box if any of the items on the list are IT-related. IT-related purchases require the vendor to complete HECVAT and VPAT forms. Links to these forms appear on the Review screen once the request has been saved. Completed forms must be attached to the request.

Screen 3 - Request Funding

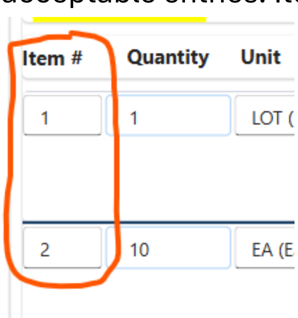


Type the funding information on the top portion of the screen and click Add to save to the list on bottom portion of the screen.

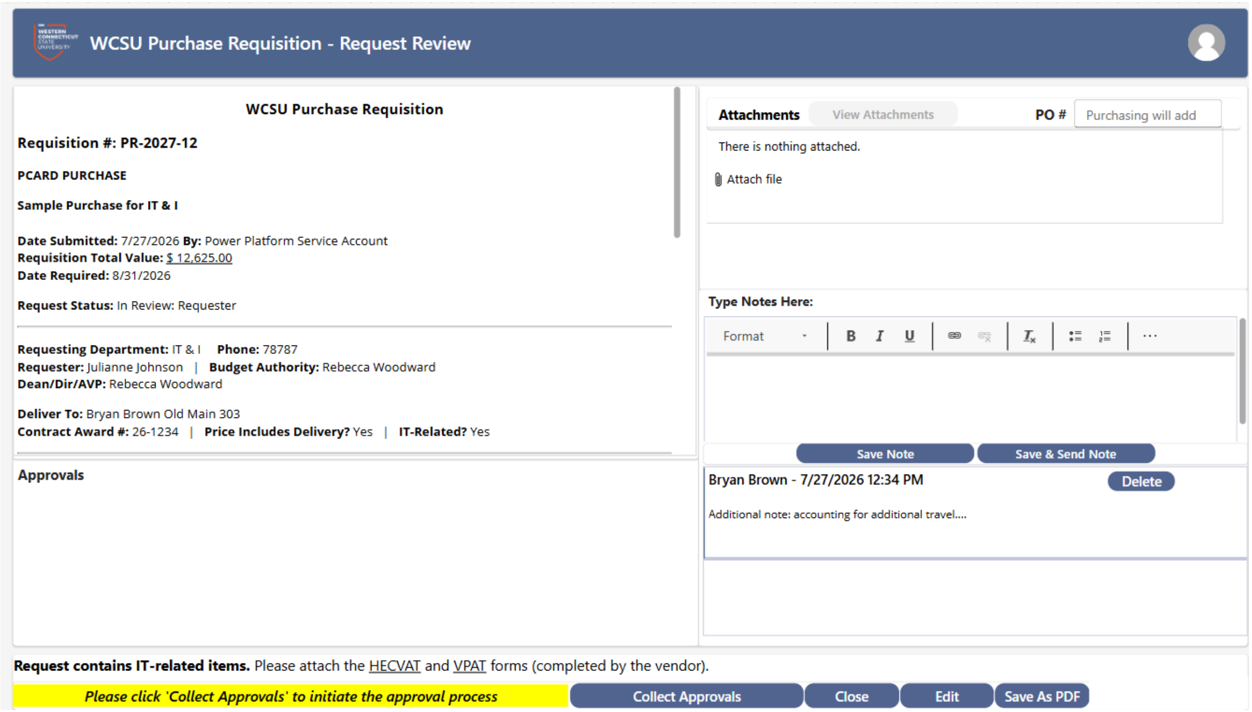
Funding information that appears on the list can be edited directly on the list except for Approver. If the Approver needs to be changed, re-add the funding row with the new approver, then remove the row with the incorrect approver.

Accounting Type: In most cases, this will be 'Document Lvl.' Purchases related to a project will use Commodity accounting. Consult with the Purchasing Department for guidance.

Apply to Item #(s): If there are multiple funding sources, the related items (from the previous screen) can be referenced in this optional field. This is an open text field so entries such as "1", "1,3,7", "2-4" are all acceptable entries. Item numbers can be viewed on the Request Items screen:



Request Review



After the requisition form data has been submitted, the Request Review screen will be displayed. This is the screen that contains a read-only version of the request and is where approvers will review and sign.

Collect Approvals: Clicking this button will:

- Build the approval workflow queue. Additional reviewers will be added (i.e., Provost or President) if certain threshold conditions are met. Refer to the Purchasing Overview to see the list of approvers
- Assign the request and send an email notification to the Reviewer (if one was specified) or the first approver
- The email notification sent contains a direct link to the request

Edit: This button is available to the submitter or reviewer until the request is assigned to the first approver. It is always available to Purchasing Department staff. Clicking this button will open the editable forms.

Save As PDF: Clicking this button will save a PDF copy of the requisition to the current user's OneDrive, in a folder called WCSUApprovals

Resend: Resends the email notification to the current approver. Use this option when a request has been waiting in the current approver's queue.

Cancel Request: This button is only available to the person who submitted the request, the person identified as the requester, and staff members in the Purchasing Department.

Clicking this button will:

- Mark the Request Status as **Canceled**
- Change the approval queue back to the form submitter

- Send a notification to the submitter and requester that the request has been canceled.
- A canceled request can be resubmitted by:
    - Switch the **Now Showing** toggle to **All** on the **Home** screen
    - Locate the request on the list of requests, click to open
    - Click the **Edit** button to modify the request
    - When modifications are complete, click **Collect Approvals** to restart the approval workflow.

Notes: notes can be added to the request and are viewable by anyone who can view the request. Clicking **Save & Send Note** will send the note via email to the form submitter and requester (this option is typically used by Purchasing staff)

Attachments: supporting documentation. Clicking on an attachment in the list will prompt the user to download a copy. Use the **View Attachments** button to view attachments in the browser.

Additional documentation can be attached at any time.

Approving/Denying a Request

The Approve and Deny buttons will appear if the request is in the current user's queue. If an approver appears on multiple lines, they can record all approvals at once. **Note**: an email notification will be sent once the current user approves, even if they are also the next approver. These additional notifications can be ignored.

Approve: Clicking this button will record the decision and signature of the approver and send an email notification to the next approver.

Deny: Clicking this button will display a confirmation pop-up. If confirmed, the Request Status will change to Denied and the decision and signature of the approver will be recorded.

Additionally, a text box will be displayed where the user will note why the request was denied.

An email notification will be sent to the submitter and requester and will include the reason the request was denied. The deny reason will also be saved in the Notes of the request.

Resubmitting a Canceled or Denied Request

A canceled or denied request can be resubmitted by the original submitter or requester by following these steps:

- Switch the **Now Showing** toggle to **All** on the **Home** screen
- Locate the request on the list of requests, click to open
- Click the **Edit** button to modify the request
- When modifications are complete, click **Collect Approvals** to restart the approval workflow.