Approval Flow Process Guide

Approval flows are generated by the system based on several determining factors. One of these is the user’s designated management level, or amount they are allowed to purchase before a supervisor is added to their eRequisition’s approval flow. Some state agencies also have approval flows generated based on the commodity code selected for the item on the eRequisition (e.g., IT commodity), as well as requiring approvers such as the Financial approver and the Chief Procurement Officer be put in the approval flow. The approval flow for an eRequisition can be seen on the Approval Flow tab on the ‘Summary’ page. Users cannot modify their standard approval flow, but are able to add additional approvers that are not automatically populated in the approval flow.

I. Approval Flow Navigation

1. To view the approval flow for the eRequisition, click the ‘Approval Flow’ tab from the ‘Summary’ page.
2. The ‘Approval Flow’ tab will be displayed. The ‘Approval Flow’ tab tells where the requisition is in the approval process.

**Note:** The ‘Legend’ indicates the status of the eRequisition as it moves through the approval flow.

- **Pending:** Indicates that the eRequisition has not been sent to the approver for approval.
- **Active:** Indicates that the eRequisition is currently in the approver’s approval queue awaiting approval.
- **Approved:** Indicates that the eRequisition has been approved by the designated approver.
- **Denied:** Indicates that the request has been denied by the approver. The user should review the comments section of the eRequisition for comments added by the approver indicating why the request was denied.
- **Watcher:** Watchers are added to the approval queue so that they can see the approvable going through the approval flow. They are not required to approve the document.
3. Hover over each approval node in the approval flow to see why that approver was triggered.

**Note:** The approval flow is determined by the management chain and the rules set by each agency.

- **On Behalf Of Rule:** If a requester creates an eRequisition ‘On Behalf of’ another user, that user will automatically be added as a watcher at the beginning of the approval flow.
- **Required Agency Approver Rule:** Determined by the requester’s supervisor(s) in the management chain. Approvers in the management chain are added until the final approver in the chain’s management threshold exceeds the dollar amount on the purchase order.
- **Commodity Approver Rule:** Can be added based on the selected commodity codes. For example – IT purchases.
- **Financial Approver Rule:** Agency settings determine if a financial approver is added into the approval flow.
- **Purchasing Agent Rule:** Agency settings determine if a purchasing agent is added into the approval flow.
- **Chief Procurement Officer Rule:** Based on the agency-specific settings this approver may appear as an approver or as a watcher.
II. Adding Approvers

If the approval flow that is automatically generated based on the management chain and other agency settings is not sufficient, additional users can be manually added to the approval flow.

1. Click the ‘Add Approver’ button to add additional approvers to the existing approval flow.

**Note:** Approvers added by the original requester can only be added at the beginning, or in parallel. Once the eRequisition has been submitted, an approver can add another approver anywhere in the approval flow (i.e., subsequent approver, final approver, or in parallel).

The approval status in this example is ‘Pending’. The eRequisition has not been submitted and sent to the first approver’s approval queue.
2. Once ‘Add Approver’ is clicked, the options for adding an approver will appear. Use the ‘Add Approver to Approval Flow’ drop down menu to select the desired approver to add.

3. If the approver’s name does not appear in the drop down menu, select ‘Search for more...’ and locate the approver’s name in the pop-up window that appears.

Note: Purchase & Contract or ITS must be manually added to the approval flow for eRequisitions over agency delegation. This can be done by the requester or a subsequent approver. For non-IT purchases over agency delegation, the State Purchase and Contract Approver must be added to the end of the approval flow. For IT purchases over agency delegation, the Statewide IT Procurement Approver must be added to the end of the approval flow. Both the State Purchase and Contract Approver and the State IT Procurement Approver can be located by searching on the word ‘State’ in the pop-up box that appears once ‘Search for more...’ is selected. Be certain to select State IT Procurement Officer and NOT the ITSS Chief Procurement Officer.

Note: Watchers can also be added to the approval flow at this point. A watcher will receive the eRequisition in their approval queue but is their approval is not required for the eRequisition to proceed in the approval flow.
4. Select whether the user should be added as an approver (required) or as a watcher (not required).

5. Select where the user should be added into the approval flow. If the approval flow is being modified by the original requester, the options will be ‘Add approver to the approval flow, as the first or subsequent approver’ or ‘Add approver in parallel to the entire approval flow.’

**Note:** If the approval flow is being modified by a user in the approval flow and not the requester, an option will appear to modify the approval flow by adding a user to the end of the approval flow.

6. Click ‘OK.’
7. The selected approvers will now appear in the approval flow in the designated location.
III. Deleting Approvers

If a user has been manually added to the approval flow using the process outlined in Section II, they can also be deleted.

1. To delete a manually added approver, click ‘Delete Approver.’

![Image showing the interface for deleting approvers in the Ariba Spend Management system]
2. Select an approver to be deleted by clicking the radio button next to the approver to be deleted.

3. Click ‘OK.’

**Note:** Only approvers that have been manually added to the approval flow can be deleted. The user that manually added the approver must be the one to delete them.
4. Once ‘OK’ is clicked, the approval flow will be updated and the selected approver will no longer appear.