



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.

The screenshot displays the NCE-Procurement system interface. At the top, the logo and navigation links are visible. The main content area shows the requisition details for RQ20004904. The 'Approval Flow' tab is highlighted with a dashed circle. Below the tabs, there are fields for Title, Pre-Encumbrance Status, On Behalf Of, Delay Purchase Until, Buying Entity, and Transmit To Supplier. A 'Line Items' table is shown below, with one item listed: Paper, Bond, Recycled 100%, White, Boise ... with a quantity of 1,000 and a total cost of \$48,450.00000 USD.

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Price	Amount
1		Paper, Bond, Recycled 100%, White, Boise ...	054922	1,000	carton	\$0.00000 USD	\$48.45 USD	\$48,450.00000 USD

Total Cost: \$48,450.00000 USD



2. The **'Approval Flow'** tab will be displayed. The **'Approval Flow'** tab tells will display 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.

The screenshot displays the 'Approval Flow' tab for requisition RQ20004888. The legend indicates the status of each approver: Approved (green checkmark), Watcher (blue icon), Active (red exclamation mark), and Pending (grey icon). The flow shows RQ20004888 with NCAS Approver (Approved), NCAS Watcher (Watcher), and ITSS Financial Approver 1 (Active). A yellow callout box points to the legend with the text: "The 'Legend' graphically depicts approver status."



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.

The screenshot displays the 'Approval Review' page for request RQ20004888, which is in a 'Submitted' status. The interface includes a navigation bar with 'Home', 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. Below the navigation, there are tabs for 'Summary', 'Approval Flow', 'Orders', 'Receipts', and 'History'. The 'Approval Flow' tab is active, showing a flow diagram with three nodes: 'NCAS Approver', 'NCAS Watcher', and 'ITSS Financial Approver 1'. A legend at the top left of the flow diagram indicates that a blue box represents an 'Active' node, a grey box with a watch icon represents a 'Watcher', and a grey box with a document icon represents a 'Pending' node. A dashed oval highlights the 'NCAS Approver' node, which is associated with the rule 'Active - Required agency approver'. Below the flow diagram is an 'Add Approver' button.



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 screenshot displays the 'Approval Flow' section for requisition RQ20004904. The status is 'Pending'. The flow consists of three steps: NCAS Approver, ITSS Financial Approver 1, and ITSS Purchasing Age. An 'Add Approver' button is located at the bottom left of the flow diagram. A yellow callout box points to the 'Pending' status, stating: '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.

NC E-Procurement @ your service A R I B A* SPEND MANAGEMENT Home | Help | Logout
Welcome NCAS Requester

Create Search Manage Recent Preferences

RQ20004904: Approval Flow Back to Catalog Submit Exit

Review your requisition, make changes as necessary, and submit the request for approval.

Summary Approval Flow

APPROVAL FLOW - EREQUISITION

Add approver to approval flow (no value) +

Add this approver as:

Provide a reason:

Legend: Pending

RQ20004904 [NCAS Approver] [ITSS Financial Approver 1] [ITSS Purchasing Age]

Add approver to the approval flow, as the **first** or **subsequent** approver
 Add approver in **parallel** to the entire approval flow

OK Cancel

Back to Catalog Submit Exit

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.'

The screenshot displays the 'Approval Flow' configuration page for requisition RQ20004904. The page title is 'RQ20004904: Approval Flow'. The breadcrumb trail is 'Home > Approval Flow'. The main heading is 'APPROVAL FLOW - EREQUISITION'. The 'Add approver to approval flow:' dropdown is set to 'NCAS Administrator'. The 'Add this approver as:' radio buttons have 'Approver' selected. The 'Provide a reason:' field is empty. The 'Legend:' section shows 'Pending' with a checkbox. The approval flow diagram shows a sequence of steps: RQ20004904, NCAS Approver, ITSS Financial Approver 1, and ITSS Purchasing Age. The 'Add approver to approval flow, as the first or subsequent approver' option is selected. The 'OK' and 'Cancel' buttons are visible at the bottom left.



7. The selected approvers will now appear in the approval flow in the designated location.

The screenshot displays the 'Approval Flow' section for requisition RQ20004904. The page header includes 'NCE-Procurement @ your service', 'ARIBA SPEND MANAGEMENT', and navigation links like 'Home', 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area shows the requisition details and a flow diagram. The flow diagram consists of three roles: 'NCAS Administrator', 'NCAS Approver', and 'ITSS Financial Approver 1', connected by arrows. A dashed oval highlights the 'NCAS Administrator' role. Below the flow diagram are buttons for 'Add Approver' and 'Delete Approver', and a message stating 'New approver was added successfully.' The page footer includes 'Back to Catalog', 'Submit', and 'Exit' buttons.



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.'**

The screenshot displays the NCE-Procurement interface for requisition RQ20004904. The page title is "RQ20004904: Approval Flow". The navigation bar includes "Home", "Create", "Search", "Manage", "Recent", and "Preferences". The main content area shows the approval flow process. A legend indicates the status is "Pending". The flow consists of three steps: "NCAS Administrator", "NCAS Approver", and "ITSS Financial Approver 1". Below the flow, there are two buttons: "Add Approver" and "Delete Approver". The "Delete Approver" button is circled in red. A message below the buttons states "New approver was added successfully." The page also includes "Back to Catalog", "Submit", and "Exit" buttons.



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.

The screenshot displays the 'Approval Flow' interface for requisition RQ20004904. At the top, the header includes 'NCE-Procurement @ your service', 'ARIBA* SPEND MANAGEMENT', and navigation links like 'Home', 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area shows the requisition title and a 'Review your requisition, make changes as necessary, and submit the request for approval.' instruction. Below this, there are tabs for 'Summary' and 'Approval Flow'. The 'Approval Flow' section is titled 'APPROVAL FLOW - EREQUISITION' and contains the instruction 'Choose an approver to delete:'. A legend indicates that a checked box represents 'Pending'. The flow diagram shows three steps: 'RQ20004904' (with a document icon), 'NCAS Administrator' (with a radio button selected), 'NCAS Approver' (with a radio button), and 'ITSS Financial Approver 1' (with a radio button). Below the flow diagram, there are 'OK' and 'Cancel' buttons. At the bottom right, there are 'Back to Catalog', 'Submit', and 'Exit' buttons.



- Once 'OK' is clicked, the approval flow will be updated and the selected approver will no longer appear.

The screenshot displays the NCE-Procurement eRequisition interface. At the top, the header includes the NCE-Procurement logo, 'ARIBA SPEND MANAGEMENT', and user navigation links like 'Home', 'Help', and 'Logout'. Below the header, a navigation bar contains 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The main content area shows the requisition ID 'RQ20004904: Approval Flow' with buttons for 'Back to Catalog', 'Submit', and 'Exit'. A message prompts the user to 'Review your requisition, make changes as necessary, and submit the request for approval.' Below this, there are tabs for 'Summary' and 'Approval Flow'. The 'Approval Flow' section is titled 'APPROVAL FLOW - EREQUISITION' and features a legend for 'Pending' status. The flow diagram shows three approvers: 'NCAS Approver', 'ITSS Financial Approver 1', and 'ITSS Purchasing Age'. An 'Add Approver' button is visible, and a message below it states 'Approver was deleted successfully.' At the bottom right, there are 'Back to Catalog', 'Submit', and 'Exit' buttons.