



Quick Reference Guide

Workflow

What is workflow?

“*Workflow*” refers to the automatic and manual approvals which happen in Bobcat Buy after a requisition is submitted.

Who manages workflow assignments?

Chief Administrative Officers (CAO) are responsible for coordinating assignment of approvers for their departments per the existing delegations and business processes determined by their division/department head.

Changes to Department, Fiscal and Fund Approver assignments in workflow are requested by submitting the “Add or Change User Role” request form located in the “Forms” link on the homepage of Bobcat Buy. Once submitted, the form is routed to the CAO(s) for that department for review and approval.

Visibility into workflow

Bobcat Buy gives you full visibility into which workflow steps will be triggered depending on what item(s) are being purchased, the level of authority of the individual submitting the requisition, dollar value of the order and other relevant factors.

Example: If the item(s) you are purchasing contain a hazardous material, you might see that this order will route to an Environmental Health & Safety (EH&S) representative for approval *prior* to purchase. This happens to ensure appropriate licenses are in place for the items being purchase as well as to ensure EH&S is aware of what is being purchased/shipped to our Campus and which item(s) may need special handling, storage planning, or disposal tracking.

Approval timing

Seconds after a Shopper places an order, workflow begins. Automated validation steps occur within seconds and staff and faculty assigned as approvers can approve from their desktop, email or the mobile application on their phone to help expedite the approval process.

How do approvals occur?

Some workflow steps trigger automatic system checks, while others, for example, invoke a manual action which an Approver must perform. (*Important note: If you are an Approver, there is an easy mobile app available in which approvals can be performed with a quick click!*)

Example: Automatic Step - The system will automatically verify that a Fund Approver is assigned to the grant FAU which has been selected so the order continues to move forward quickly in the procurement process.

Example: Manual Step - The system will automatically route an order to other required approvers such as a Fiscal Approver who will review and then approve or reject the order based on their role within the system.

Who approves?

Multiple approvals may be required, depending on the characteristics of the order being placed. Examples of Approver types and review reasons are listed below.

(Note: Not every purchase will trigger every possible approver. Workflow 'knows' which approvers should be triggered for each type of order depending on variables such as: order type, dollar value, or FAU restrictions.)

Department Approval (Optional)

Review all requisition on FAUs issued from that department in order to ensure:

- Requirements the department has put in place are met;
- Verify accounting code used and/or
- Manage departmental budgets, etc.

General Approval – All orders go through this step to verify the order is compliant with applicable restrictions and laws and is complete.

- Individuals assigned to this role must be trained Department Buyers.
- Individuals in this role will also ensure that any unique or one time approvals not automated in workflow occur and are documented as an attachment to the order.

Fiscal Approval – Orders are routed to a Principal Investigator (PI), Department Head or delegate determined by the Accounting Codes/FAUs they are assigned to approve.

- The fiscal approver determines if the order should be approved or not and then approves or rejects the order as appropriate *i.e. does the fiscal approver want to use the requested funds for the requested purpose and if so are they being used in a fiscally responsible manner and within budget.*
- Fiscal Approvers are assigned at the Unique FAU level (Account, Cost Center, Fund) combination.

- Fiscal Approvers can be assigned by dollar threshold to help expedite lower dollar purchases while ensuring higher level review of high value orders. Available approval thresholds per FAU are:
 - \$0 - \$499.99
 - \$500 - \$4999.99
 - \$5,000 - \$9,999.99
 - \$10,000 - \$49,999.99
 - \$50,000 +

- It is possible, and strongly encouraged, to assign more than one approver to each workflow step and dollar value to ensure there is adequate backup and support for approvals. When this occurs, all approvers assigned to a step are notified and can approve the order however only one of them is required to approve before the order proceeds to the next workflow step.

Fund Approval – Orders that contain an Accounting Code/FAU related to grant or special funds will route to a Research Administrator (RA) or equivalent in this workflow step. They will ensure adherence to grant or special fund restrictions and verify fund availability.

EH&S & Other Restricted Approval Steps – A number of steps exist to ensure review by appropriate offices responsible for ensuring requirements related to the procurement of hazardous material, chemicals, live animals and other restricted commodities.

Procurement & Contract Approval – Orders requiring procurement or contract staff review will route to this step for review.

Strategic Sourcing Approval – Orders requiring strategic sourcing staff review will route to this step for review.

Ad Hoc Approver – Any approver listed on a specific order may add up to one additional approver on an order that they are reviewing.

- The approver will still need to approve but the order will then route to the additional approver before continuing with workflow steps triggered by the system.

- Adding an Ad Hoc Approver will not replace any other Approvers. This simply adds an additional Approver, if and as needed on an individual order basis. This may be useful in rare cases when a specific order has a unique attribute that requires another individual to review.

- Any active Bobcat Buy user can be added as an additional approver.

BobcatBuy Purchase Requisition Approval Process Summary

