

Setting Up Requisition Approvals

Draft

This page is a draft and may contain incomplete or inaccurate information

- [Module](#)
- [Configuration](#)
- [Permissions Setup](#)
 - [Roles](#)
 - [Account Filters](#)
- [Groups & Group Chains](#)
- [Define Group Chains for Users](#)

Prior to performing the following setup, please follow the [Workflows Installation Guide](#) for the technical setup.

Module

In order to access Requisition Approval options, first the Workflows Module will need to be enabled. For more information on System Modules [click here](#).

1. Go to System > Modules

2. Locate the Workflows Module and click the  to install.

	Description	Installed	Requ...	Module Id
	ACHProcessing Module	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.achProcessing
	Accounts Receivable Module	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.receivables
	Classic RequisitionApproval Module	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.classicRequisitionApproval
	EIS Classic Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.eis-classic-integration
	Email Notification Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.notification-email
	File Storage Management Module	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.filemanagement
	File Storage Module	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.filestorage
	File Transfer Notification Services (FTP, SFTP, FTPS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.notification-ftp
	Http Notification Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.notification-http
	LDAP Directory Authentication	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.authnz-ldap
	Legacy Password Migration	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.authnz-vms
	Mass Change Service	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.masschange
	Pre-Encumbrance Module	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.pre-encumbrance
	Simple Balance Checking Module	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.simple-balance-checking
	Twitter Notification Services	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.notification-twitter
	USPS Integration Module	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.usps-integration
	User-Based Balance Checking Module	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.user-based-balance-checking
	Windows Active Directory Service Authentication	<input type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.ssd.common.authnz-ads
	Workflows Module	<input checked="" type="checkbox"/>	<input type="checkbox"/>	org.ssd Ohio.usas.workflows
	Payable Module	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	org.ssd Ohio.usas.payable

3. Once installed the  will change to 

4. The checkbox in the 'Installed' column will now be checked.

Other Modules

Verify that these modules are also installed: Email Notification Services, File Transfer Notification Services, HTTP Notification Services.

Configuration

Once the Workflows Module has been enabled, navigate to System > Configuration.

Workflows Configuration

- Enter the USAS application URL. This will be used in emails sent via the workflow process so most likely it will be the standard URL that will be used to get to the current instance.
- Check the box to enable Requisition Approval. This enables System menu options related to Requisition Approvals and adds 'Submit for Approval' button, Workflow Approval Status, and Approval Audit Trail to the Requisitions page. When Requisition Approval is enabled, Requisitions can only be converted if they are in Approved status.

Requisition Approval Configuration

Allows configuration of approval due dates and to customize the content of emails sent for Requisition Approvals. This configuration will be setup to default values - customization is optional. See the [Configuration](#) documentation for details on the available options.

Email Configuration

In order to be able to send emails for approvals, the Email Configuration must also be populated.

Permissions Setup

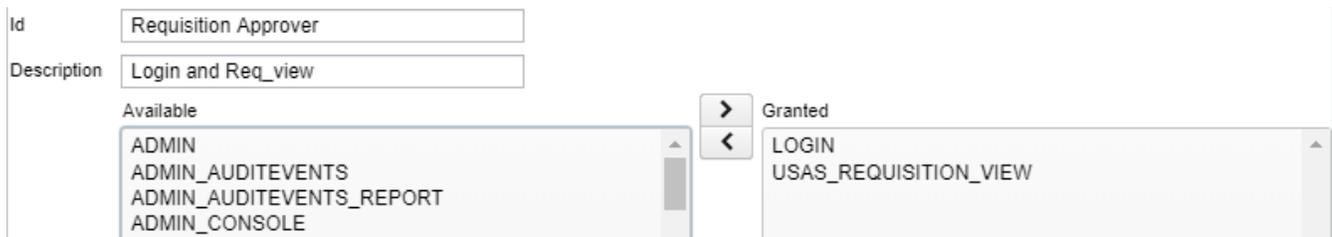
Roles

Users that will be submitting requisitions for approval and those that will be approving requisitions do not need Workflow specific permissions, only access to Requisitions. Once Requisition Approval is enabled in the Workflows Configuration, located under the System/Configuration menu, the appropriate options will be added for those users with USAS_REQ access or greater.

Requisition Approver Only

If you would like to grant a user that does not enter Requisitions access to USAS-R **only** to approve Requisitions, a role with the following permissions can be created.

- LOGIN
- USAS_REQUISITION_VIEW



The screenshot shows a role configuration interface. The 'Id' field contains 'Requisition Approver' and the 'Description' field contains 'Login and Req_view'. There are two panes: 'Available' and 'Granted'. The 'Available' pane lists permissions: ADMIN, ADMIN_AUDITEVENTS, ADMIN_AUDITEVENTS_REPORT, and ADMIN_CONSOLE. The 'Granted' pane lists permissions: LOGIN and USAS_REQUISITION_VIEW. Arrows between the panes indicate the transfer of permissions.

If the Approver should also have access to update the account code when approving, a role with the following permissions can be created.

- LOGIN
- USAS_REQUISITION_VIEW
- USAS_REQUISITION_UPDATE



The screenshot shows a role configuration interface. The 'Id' field contains 'Requisition Approver' and the 'Description' field contains 'Login and Req_view'. There are two panes: 'Available' and 'Granted'. The 'Available' pane lists permissions: ADMIN, ADMIN_AUDITEVENTS, ADMIN_AUDITEVENTS_REPORT, ADMIN_CONSOLE, and ADMIN_EVENTS. The 'Granted' pane lists permissions: LOGIN, USAS_REQUISITION_UPDATE, and USAS_REQUISITION_VIEW. Arrows between the panes indicate the transfer of permissions.

Workflow Setup

Users with Administrator access will automatically be granted access to setup and manage the creation of Groups and Group Chains that determine the Approval path. The following options are available to grant additional access to users without the Administrator Role. In order to grant full access to setup Groups, Group Chains, and manage Requisitions submitted for approval, the following permissions would be needed:

- USAS_GROUP
- USAS_WORKFLOWS_ADMIN

Assign Group Chain to Users

In order to assign Group Chains to Users, the USAS_USER permission would also be needed. This permission is generally kept to Admin users for audit purposes. The following permissions could be used to create and manage the Groups/Group Chains and then an Admin user can assist with assigning the Group Chains to users.

Role Setup

1. Navigate to the System > Roles grid.
2. Create a new Role. Assign an ID - Description optional.
3. Locate the USAS_GROUP & USAS_WORFLOWS_ADMIN permissions and move this to Granted
4. Save

Example Role Setup:

Save Cancel

Id: Workflows Admin
Description: Setup & Manage Workflows

Available	Granted
USAS_GAAP USAS_GAAP_EXPORT USAS_GAAP_EXPORT_VIEW USAS_GENERALLEDGER USAS_GENERALLEDGER_CREATE USAS_GENERALLEDGER_DELETE	USAS_GROUP USAS_WORFLOWS_ADMIN

Standard Admin Permission

The USAS_WORKFLOWS_ADMIN permission will grant access to the Workflows > Workflows Admin page. This allows a user to view all in-progress requisitions, the requisition date, the requisitioner, and the due date.

Save Cancel

Id: Workflow Admin
Description: Setup & Manage Workflows

Available	Granted
USAS_RIGHT_VIEW USAS_TRANSACTION USAS_TRANSACTION_ANTICIPATED USAS_TRANSACTION_ANTICIPATED_REVENUE USAS_TRANSACTION_ANTICIPATED_REVENUE_DELETE USAS_TRANSACTION_ANTICIPATED_REVENUE_REPO USAS_TRANSACTION_ANTICIPATED_REVENUE_VIEW USAS_TRANSACTION_BUDGET	USAS_WORKFLOWS_ADMIN

Bypass Permission

The USAS_WORKFLOWS_BYPASS permission can be used to grant a user access to the Workflows > Workflow Bypass page. This permission will allow instant approval on a requisition while bypassing all other approvals defined in the associated Group Chain. This permission should be granted with caution and only to high level users.

Id: Work Flows Bypass
Description: Role that can Bypass a Workflow

Available	Granted
ADMIN ADMIN_AUDITEVENTS ADMIN_AUDITEVENTS_REPORT ADMIN_CONSOLE	USAS_WORKFLOWS_BYPASS

Account Filters

Account Filters applied to a User will be used for Requisition Approval. An Approver must have at least Read Only access to the account code used on a Requisition in order to Approve OR Reject the transaction.

Groups & Group Chains

The Groups and Group Chains determine which users will be involved in the Approval process and in what order requisitions should be approved by those users.

Groups

A group is made up of one or more users that can be assigned as participants in a Group Chain of the Requisition Approval process. Groups may contain multiple users where all users must approve the requisition before the approval process continues or it may contain multiple users that only one user in the group approves the requisition before the approval process can move on.

See the [Groups page](#) for how to create a Group.

Group Chains

A group chain defines how the requisition flows from one group to another throughout the approval process.

See the [Group Chains page](#) for how to create a Group Chain.

Define Group Chains for Users

In order for a User to be able to submit a requisition for approval to a Group Chain, this must be defined on their User setup.

1. Navigate to the System > Users page
2. Edit a user
3. In the Selectable Group Chains section, move one or more Group Chains to the right side
4. Save

