

Is Your Workflow Working for You or Against You



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FORUM 2009

Mapping Strategies in Uncertain Times



Is Your *eVA* Workflow Working for You or Against You

- Is your workflow helping or hurting?
 - Does it help you meet your procurement policies?
 - Does it match your current delegations?



Approvals WHAT Approvals?

- What approvals are you currently using?

Vendor

Dollar \$\$\$

Commodity

Expenditure Limit

Account Codes ??

WFA



Workflow Structure

- Workflow from the top down
 - eVA –System Wide
 - PCard not preparer
 - Entity Wide
 - Ad Hoc Vendor
 - Vendor certification (Small)
 - Accounting Codes (5)
 - PO Category (V codes)



Workflow Structure

- Department / Business Unit (BSO)
 - Dollar 1, 2, and 3
 - Commodity Approvers

- User
 - Expenditure Limit Approver

- Department (BSO) / User COMBO
 - Supervisor
 - Delegated Purchasing Authority



System Wide Approvals (for all entities)

- P-Card not Preparer
 - Requires no set up and will fire:
 - If a user buys on behalf of another user and uses their P-Card
 - OR
 - When a P-Card holder has loaded authorized users under their P-Card preferences and the user creates a PR and selects the P-Card holders card. (Inserted as 1st approval)



Entity Wide (custom for your entity) ***AKA – Signer Rules***

- Ad Hoc Vendor
 - Fires when a user submits a PR that the vendor was:
 - Added from scratch
 - OR
 - Edited a contact on a registered vendor
- *Why use?* To verify the proper PO category was selected "01" or "02"



Entity Wide (custom for your entity)

- Vendor Certification (Small)
 - Fires when a user submits a PR that the vendor is **not** certified as a DMBE-Certified Small Business (can be Dollar based)
- Why use? To verify that proper Documentation is attached.



Entity Wide (custom for your entity)

- Accounting Codes
 - Fires when a user selects an accounting code that requires “Special” approvals (can be Dollar based and up to 5 different accounting fields)
- Why use? To verify that proper approvals occur based on Entity needs. (I.e.: ARRA Codes)



Department / Business Unit (BSO)

- Dollar Approvers
 - Approval occurs when a user submits a PR
 - Up to 3 approvers at different dollar levels

- Commodity Approvers
 - Approval occurs when a user submits a PR that has line items that have selected commodity codes that match those loaded
 - Up to 20 codes



User

- Expenditure Limit Approver
 - Approval fires anytime the user submits a PR over the limit set
 - Dollar based
 - Can be a user or role assigned to approve



Department (BSO) / User COMBO

- Supervisor
 - The eVA assigned supervisor is inserted any time the user submits a PR
- Delegated Purchasing Authority
 - Is based on combo of Contract and dollar. Approver is inserted any time the user submits a PR that is over the \$ limit established and is NOT a contract item.



Approval Order

- Any of the approvals discussed can “fire” in the order that best suits the Entity needs
 - It is Entity Wide
 - AKA – Token Rules



So what is next?

- I Don't know my current workflow?
- I need to change my current workflow?

Contact your Account Executive, they will help you with what questions you may have and what ever changes you want to make.



Questions ?

- Thanks
- Please complete the class evaluation
- Enjoy Forum