

# Is your eVA Workflow Working for You?



## Is your eVA Workflow Working for You?

FORUM2015

Janne Erbe, MBA, VCA – eVA Global Security Officer, DGS/DPS

Kim Hatala, CPPO, CPPB, VCO – Procurement Management Account Executive, DGS/DPS

Angel Rodriguez, VCO, CEPP – Procurement Management Account Executive, DGS/DPS

# Question



# Agenda



- What is a Workflow?
- How is it created?
- What does it look like?
- How do I find mine?
- What if mine isn't working?
- Q & A
- Closing message

# What is a Workflow?



A Workflow, is an approval sequence based on several factors, which is also known as the *Approval Flow*.

The Approval Flow of each requisition (PR) reflects how the *Requestor's* (On Behalf Of) User Profile is set up and what they enter into the document.

**Sounds simple right?**

# Not Really...!



Technology  
Signer Rules  
Commodity Approver 2  
Commodity Watchers  
Expenditure Limit Approver  
BSO Dollar Approver  
Buy Service Org (BSO)  
Comm. Quality Signer Rules  
Account Receivable  
Comm. Quality Approvers  
BSO Dollar Approver 1  
Signer Rules  
Central or Desktop  
Accounting Code Approver Roles  
Receiving  
Vendor Signer Rules

# How is a Workflow created?



## Rules & Roles are created:

**Rule:** A term to describe an event that will trigger a role be inserted or removed from the Approval Flow.

**Role:** Are generally used in establishing approvers. A role can be assigned to more than one person. A person can be in more than one role. A role can cross over agencies.

# How is a Workflow created? (cont.)



Rules & Roles are setup at different levels.

## ➤ eVA / System-Wide level

- Large Order Rule - for requisitions exceeding \$1M
- System Administrator Approver roles - for problems

## ➤ Agency (Client) level

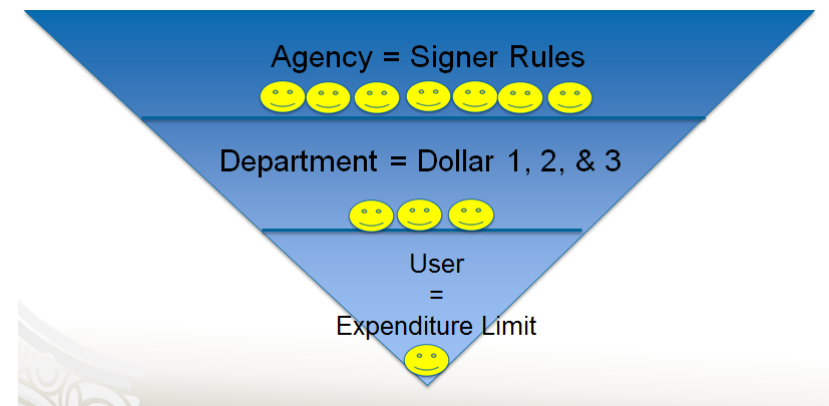
- Signer Rules. If used, they will apply to all BSO's.

# How is a Workflow created? (cont.)



## ➤ BSO (Department) level

- Dollar Approver #1, #2 & #3
- Central Receiving
- Commodity Approvers
- Watchers
- PO Printing & others



## ➤ User Profile level

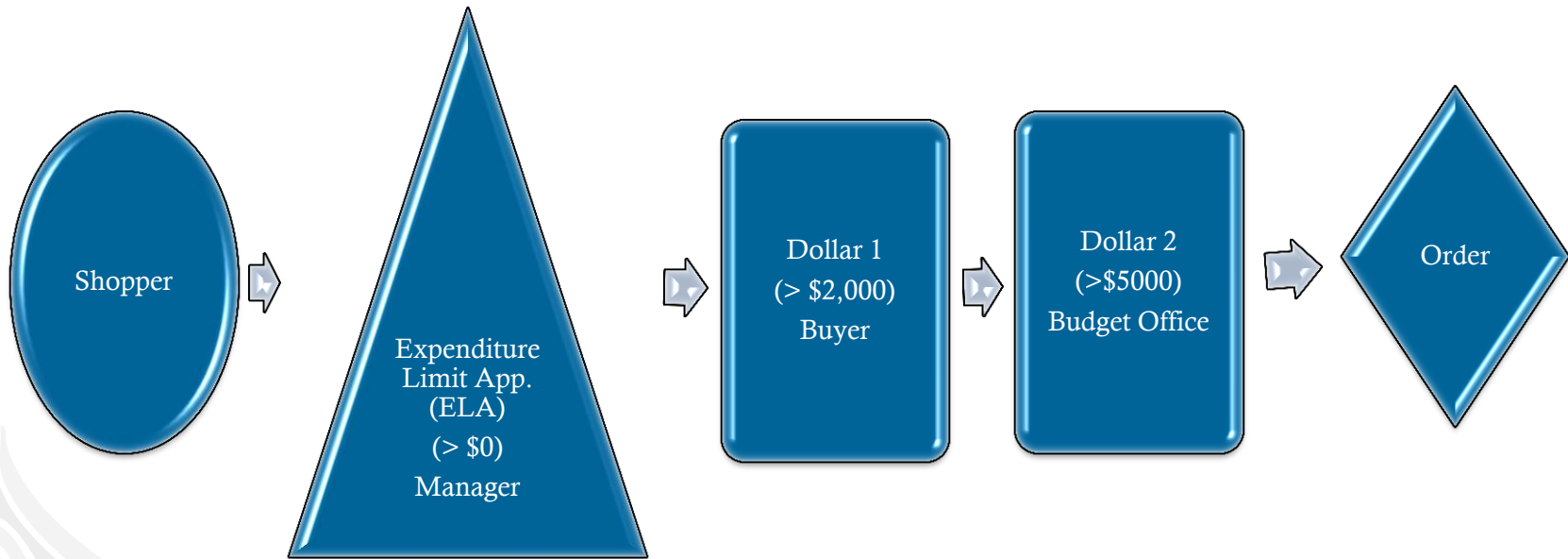
- Expenditure Level Amount & Approver (ELA)

## ➤ Document level

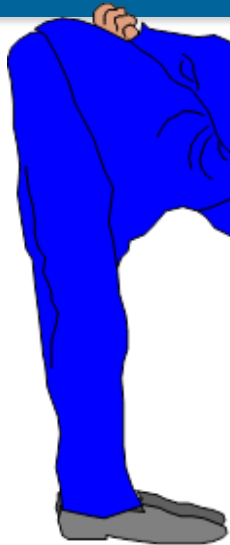
- Ad-Hoc - manually adding an Approver.



# What does a Workflow Look Like?



# How do I find mine?



Primary **Approval Flow**

APPROVAL FLOW - REQUISITION

Legend:  Watcher  Pending

PR6783621   A765-Senior Buyer  Approved

Add Approver

ner

ner  A765-Senior Buyer  Approved

Pending - Dollar 1 Approver must approve(50)

- The approval reason is illustrated by the flyover text that appears when a user hovers over a particular box in the workflow.
- Click on the role name to see what User(s) is in the Role.



# What if mine isn't working right?

- I am the supervisor and the requisition is not routed to me for approval
- I am having to approve the requisition twice
- The “System Administrator” needs to approve
- The “eVA-PCR-AELEAD” needs to approve
- An approver is missing from the approval flow
- I have to “Ad Hoc” an approver
- The approval flow is not working in the correct order
- The approval role is assigned to just one user



**It's QUESTION TIME !!**

# In Review



- Introduction
- What is a Workflow?
- How is it created?
- What does it look like?
- How do I find mine?
- What if mine isn't working?
- Q & A

**If you need changes to your eVA workflow, please contact your Agency eVA Lead. They will be responsible for your agency's eVA workflow administration and will work with your Agency's AE to request any modification necessary.**

**Thank you!**