

# Purchase Request

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## Requirements:

Allow all users to request items to be purchased and track request status. Allow for multiple approvals and finalization.

## Process:

A simple purchasing form will be built into the intranet website, not as a separate application. User will select themselves or other individual and submit a request on their behalf. Once the request is made, an email with action links will be sent to the Divisional Manager (DM). If the request is marked as expedite, an email is also sent to Operations Financial Manager (OFM) and IT Manager (ITM), and the DM process is bypassed. The DM will decide if the item is relevant for purchase, and what category it falls under (Operations, IT). If Operations, request is sent to Operations Procurement Person (OPP). If IT, request is sent to IT Manager (ITM). At this level, the request can be denied, approved, or in need of further review. If approved by ITM, request is sent to the IT Procurement Person (ITPP) and item is purchased. [IT purchase plan ends at this stage] If approved by OPP, the item is purchased. If the request is in need of further review in Operations, the request is sent to Operations Financial Manager (OFM). At this level, the request can be denied, approved, or in need of further review. If the request is approved, the request is sent to OPP, and purchase is made. If the request is need of further review, it is sent to the Clerk of Court (CC). At this level, the request can be denied, approved, or in need of further review. If approved, the request is sent to OPP and purchase is made. If the request is still in need of further review, it is brought before the budget committee and either approved or denied. If approved, the request is sent to OPP and purchase is made. [Operations purchase plan ends at this stage.] When at any point a request is denied, notice is sent to the requester allowing for comments by the denier.

## Current legend:

DM = Janet, Rick, Kathy

OPP = Eric

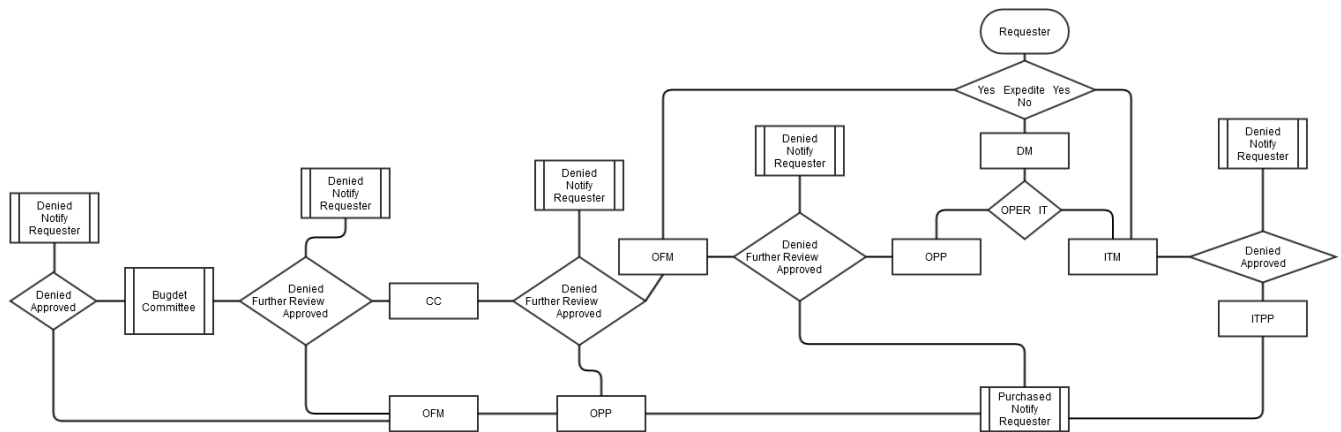
ITM = David

ITPP = Jim

OFM = Joyce

CC = Debbie

## Visual Process:



## Request Form:

**Requester:** First, Last name gathered from Court Directory

**Item Description:** Text area to describe the item requesting (possibly Rich Text Area)

**Link:** Link to item on website if applicable. Link will be “linkable” in emails and reports.

**Priority:** Low, Medium, High (high will be constitute an expedited process)

**Price:** Price of the item if applicable.

**Quantity:** How many of said item are being requested.

## Status Stages of request:

**Processing**

**Purchased**

**Complete**

**On Request List (budget committee)**

**Denied**

# Forms

## Purchase Request Form

**Purchase Request**  
[List Previous Requests](#) | [check roles/emails](#)

Select the **Employee name** who is making the request

**Purchase Request made by**

**Item Description**  
Be as descriptive as you can. To paste images, right click and select paste or hit Ctrl+V.

**Link Check Link**

Price \$

Quantity

Type

Priority

**Requester:** First, Last name

**Item Description:** Rich Text area to describe the item requesting

**Link:** Link to item on website if applicable. Link will be “linkable” in emails and reports.

**Price:** Price of the item if applicable.

**Quantity:** How many of said item are being requested.

**Type:** IT or Operations

**Priority:** Low, Medium, High (high will be constitute an expedited process)

## Purchase Request List

**Purchase Request List**  
[Create New Request](#)

Signed in as: **Tim Hughes**  
Role: **Admin**  
[Refill directory](#)

Pending Requests										
	Requester	Type	Description	Priority	Price	Quantity	Status	Last Approver	Status	Info
<a href="#">View</a>	Tim Hughes	Operations	This one's Operations to Budget Committee	Low	400,000	1	On Request List	Debbie Poplin		
<a href="#">View</a>	Tim Hughes	IT	This is a test Last One	Low		0	Processing	Kathy Keeton		
<a href="#">View</a>	Tim Hughes	IT	asdfasdf	Low	400,000	0	Processing	David Disney	Sent to ITPP	
<a href="#">View</a>	Tim Hughes			Low		0	Processing	Kathy Keeton		
<a href="#">View</a>	Tim Hughes		fadfadfa asd fadfasdf asd fasdf asdf			0	Processing	Kathy Keeton		
<a href="#">View</a>	Tim Hughes	Operations	asdfasd fasdf asdfdsf			0	Purchased	Kathy Keeton	Sent to OPP	
<a href="#">View</a>	Tim Hughes					0	Processing	Kathy Keeton		

**Completed Requests**

Processors can see all Pending Requests. Requesters can see all their requests. This access is machine based. However logins do exist for mobile users.

# Purchase Request View Form

## Purchase Request

[List Previous Requests](#)

By **Tim Hughes**

Type: **Operations**

Status: **On Request List**

Signed in as: **Tim Hughes**  
Role: **Admin**

### Description

This one's Operations to Budget Committee

Link	<a href="http://yahoo.com">http://yahoo.com</a>
Priority	Low
Price	400,000
Quantity	1

Approver	Status	Comments	Date	Time	
Kathy Keeton	Sent to OPP	asdfasdfasdf asdfasdf	05-07-2015	10:33 am	
Eric Jorgenson	Sent to OFM	This is expensive	05-07-2015	10:33 am	
Joyce Merrell	Sent to CC	asdfasdfdf	05-07-2015	10:35 am	
Debbie Poplin			05-07-2015	10:35 am	<a href="#">Deny</a>   <a href="#">Delete</a>

View request and process status log.

Ability to edit Status and Deny or Delete request based on user role.

## Email Buttons and Status updates

Button Text	Status Update
Deny Request	Purchase Denied: [NAME]

### Sent to DM's

Approve Request Send to IT	Sent to IT Manager: [NAME]
Approve Request Send to Operations	Approved and Sent to Financial Administrator: [NAME]

### Sent to ITM

Approve Request Send to ITPP	Sent to IT Manager: [NAME] Purchase Approved: [NAME]
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### Sent to ITPP

Process Request Send Notice Request Processed	Purchase Approved Purchased: [NAME]
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### Sent to Operations

Approve Request Send Notice Request Processed	Purchase Approved Purchased: [NAME]
Further Review Needed	Sent to Operation Financial Manager: [NAME]

### Sent to OPP

Process Request Send Notice Request Processed	Purchase Approved Purchased: [NAME]
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### Sent to OFM

Approve Request Send To OPP	Sent to Operations Purchasing Person: [NAME] Purchase Approved: [NAME]
Further Review Needed	Sent to Clerk of Court: [NAME]

### Sent to CC

Approve Request Send To OFM	Sent to Operation Financial Manager: [NAME]
Further Review Needed Budget Committee	Sent to Budget Committee: [NAME]

### Sent to BC

Approve Request Send To OPP	Sent to Operation Financial Manager: [NAME]
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NOTE: Latest changes are in red.

## DB Schema

purchase\_requests (MySQL server: 156.125.44.74 www.tned.circ6.dcn)

### Requests

r_id	int(11)
r_requester_id	int(11)
r_requester_name	varchar(32)
r_randid	varchar(255)
r_ipaddress	varchar(32)
r_type	varchar(16)
r_description	longtext
r_link	varchar(255)
r_priority	varchar(8)
r_price	varchar(32)
r_quantity	int(11)
r_comments	text
r_loc	int(11)
r_status	int(11)
r_startdate	date
r_enddate	date
r_lastupdated	timestamp

### Users

u_id	int(11)
u_name	varchar(32)
u_role	varchar(32)
u_username	varchar(32)
u_password	varchar(32)
u_email	varchar(64)
u_location	int(11)
u_ipaddress	varchar(16)

### Stage\_Status

ss_id	int(11)
ss_text	varchar(64)
ss_description	varchar(255)

### Approvals

a_id	int(11)
a_r_id	int(11)
a_u_id	int(11)
a_randid	varchar(255)
a_status	int(11)
a_comments	varchar(255)
a_info	varchar(255)
a_timestamp	timestamp

### tblDirectory2

employee_key	int(11)
last	tinytext
first	tinytext
mid	tinytext
suffix	tinytext
title	tinytext
loc	tinytext
phone	varchar(25)
ext	varchar(10)
oext	varchar(10)
email	varchar(50)
photo	varchar(50)
duties	longtext
lastupdate	timestamp
group1	text
group2	text
group3	text
loc2	text
loc2phone	varchar(45)
loc3	text
loc3phone	varchar(45)
loc2ext	varchar(45)
loc3ext	varchar(45)
fbook	enum('y','n')
timestamp	timestamp
gender	enum('m','f')
seq	tinyint(3)