

State of Vermont

# DPS Purchase Request Workflow

Martin, Patricia  
12-20-2021

## Table of Contents

Overview .....	2
Request submitted.....	2
Approval Emails .....	2
NON-ADS Approval Workflow Data Flow Diagrams .....	3
ADS Approval Workflow Data Flow Diagrams .....	4
Overview Approval Workflow.....	4
Approved/Rejected.....	5
Entering a ticket for a change or issue.....	6
Finding a Request: 3 Ways .....	6
Is this an ADS request? .....	10
Need to cancel or remove a request?.....	11

## Overview

The workflow is setup to enable the user to submit a request using an online form and receive approvals via email and notifications as the request makes its way through the process. Users can submit either an ADS or Non-ADS submission and the workflow will appear like this to the user:

- 1) Submission of request via an online form.
- 2) An email confirming their submission will be sent to submitter to confirm entries are correct via a word document attached to the email and to verify the division lead email. They approve/reject their submission. If approved, then the workflow proceeds to the next step. If the submitter finds errors, they can “reject” their own submission and resubmit.
- 3) Division lead receives a copy of the request for their review. If approved, then the workflow proceeds to the next step. If rejected, the submitter receives a notification, and they would review the division lead notes and submit if necessary.
- 4) The request makes it way through the proper channels of the administration (see diagram for specific workflows for ADS/Non- ADS requests) and when the entire process is completed, they will receive a copy of the request along with the PO number if applicable. Otherwise, they will be notified if the request is rejected at any point in the process.
- 5) This workflow is automated and any updates or issues with the request such as incorrect information on the request would need to be worked out with the administration team.

## Request submitted

The workflow begins when a user submits a request via online form.

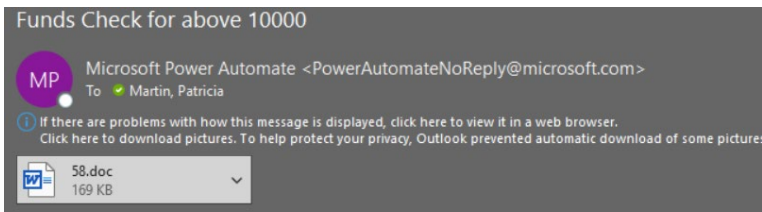
Here is the link to the Request form: <https://forms.office.com/g/TpQZfJ54Cn>.

Here is the link to the ADS request form: <https://forms.office.com/g/kKnBaeh6Sy>.

## Approval Emails

The process flow will automatically send an approval email to each person in the workflow. Please see the diagrams on the following pages for workflow.

The approver can select “approve” or “send back to submitter.” When selecting one or the other button, a URL link will bring you to the Approvals page. You can respond to the approval and add comments as well. Please note the comments for the PO are used to enter the PO number. The responses are recorded and updated in the word document and finally saved on the SharePoint list and word document file saved in the SharePoint PO document library.



## Funds Check for above 10000



Requested by Martin, Patricia <Patricia.Marti

Vendor: ACME, Dept: 2140061000 Administra  
Total10000

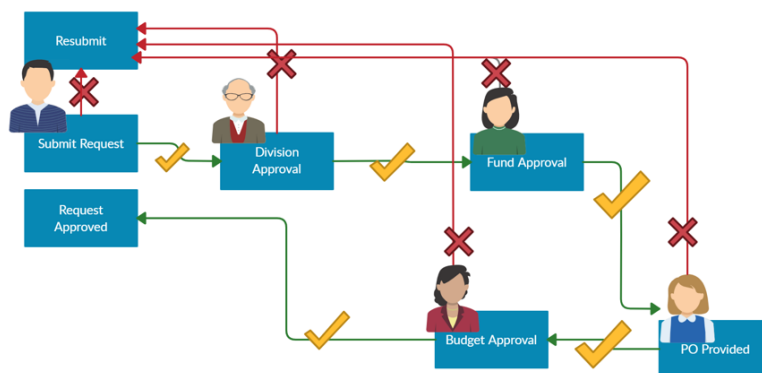
Date Created: Friday, July 9, 2021 11:52 AM G

Approve >

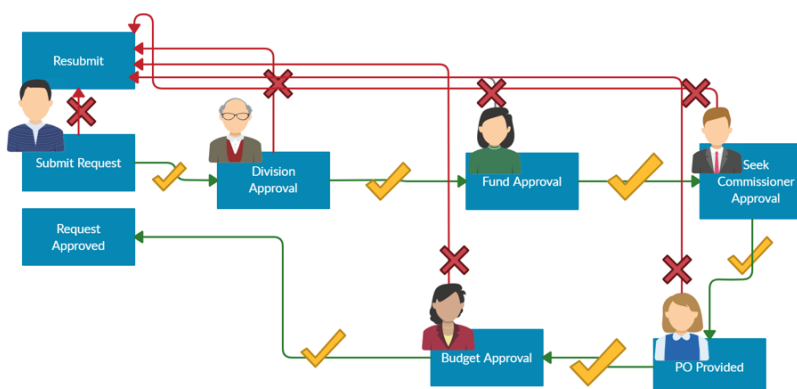
Send back to  
submitter >

## NON-ADS Approval Workflow Data Flow Diagrams

### Less than \$10,000

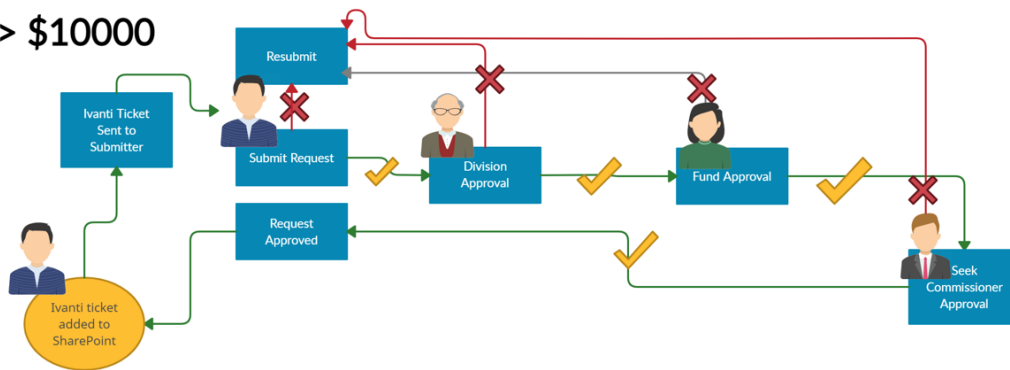


### Over \$10000

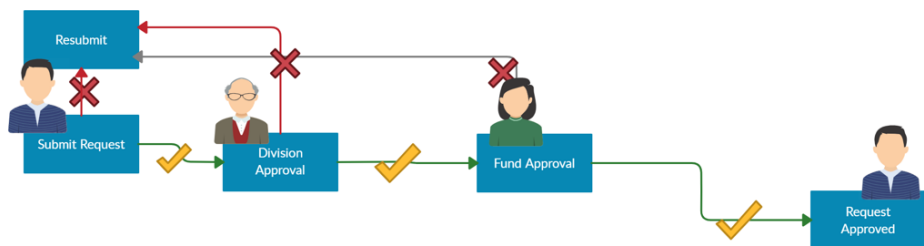


## ADS Approval Workflow Data Flow Diagrams

### ADS > \$10000



### Under \$10,000



## Overview Approval Workflow

1. **Submitter Approval Requested.** The Submitter enters the request in the Microsoft Form. Submitter receives a copy of the request as a word document via email to review and approve before the request is sent to the Division lead. They can “approve” which will send the request to their Division Lead or “send back to submitter” which will stop the workflow and won’t send a request for approval to their Division Lead.
2. **Division Approval Requested.** This is dynamic and will go to whomever is listed as division lead on the Microsoft Form. The division lead will review the request attached to the email as a word document and can “Approve” or “Send back to Submitter.” If it’s sent back to submitter, the submitter is notified via email with no request attached. The comments from the division lead are included in the text of the email. If the division lead has approved the request, then the request proceeds to the next step.
3. **Fund Approval / PO Approval / Budget Approval.** These approval steps are dependent on amount and whether the request is an ADS request or not. The approval request includes the division lead’s comments on the request. The request will arrive as an email with request attached as a word document. They will be able to “Approve” or “Send back to submitter” via the approval link in the email or via the approval link in the SharePoint list “Send approval.” If the request is rejected, at any point in the process then the approver will select “Send back to submitter” and the process stops. The submitter will be notified if their request was rejected or approved.

4. **Over \$10,000 Approval** sent to Rick Hallenbeck. This is applicable to any request whether it is ADS or a standard request. He can “Approve” or “Send back to submitter.”

## Approved/Rejected

1. **Approved.** The request will be filed in the PO library and the submitter and requestor will be notified that the request was complete. The PO number will be included on the request if applicable attached as a word document to the email.
2. **Rejected.** At any point along the way, each approver can reject the request which will stop the entire process from proceeding. Once rejected, the email is sent to the submitter and list is updated with the status of “sent back to submitter.”

**Sharepoint list for recording progress.** Send Approval. This list is read only and editable only by users within the workflow in administration.

<https://vermontgov.sharepoint.com/teams/PublicSafety-Admin/Lists/Send%20Approval/AllItems.aspx>

**Sharepoint list views** – These list views have been setup so that Requests over 10K, PO, Funds and Budget will be able to review their pending approvals and process them via the URL links rather than sorting through their email. The funds/budget/PO views are sorted by status “Pending PO Budget Funds” and blanks for the response for each department. The Rick view is setup to be sorted by the status “Over 10K OK Pending” and blanks Rick’s OK.

**Sharepoint legend** – The statuses are shown below for each item in the “Send Approval” list.

- Sent back to submitter
- Needs Budget Check
- Needs Funds Checked
- New
- Approved
- PO Pending
- Over 10K OK Pending
- Division Approval Pending
- PO Budget Funds Approved
- Funds Approved
- Budget Approved
- Commissioner Approved
- PO Provided
- Division Approved

**Sharepoint PO library.** Purchase Orders. <https://vermontgov.sharepoint.com/teams/PublicSafety-Admin/PO%20Library/Forms/AllItems.aspx>

## Entering a ticket for a change or issue

If you have an issue that you are unable to solve that is system related or need a change to the current setup, enter a ticket by sending an email to [dps.help@vermont.gov](mailto:dps.help@vermont.gov). This email should be detailed enough that the receiver can determine who to assign it to. Please include the following for proper ticket routing:

- SUBJECT LINE OF EMAIL – “DPS IT Staff – Patricia Martin”
  - DESCRIPTION – Please include the request details including app name “PO Workflow”

## Finding a Request: 3 Ways

If you have an issue and need to review the approved request, then good news: You can find the request in the sharepoint list and sharepoint document library.

- SharePoint List: <https://vermontgov.sharepoint.com/teams/PublicSafety-Admin/Lists/Send%20Approval/AllItems.aspx>
  - Each request is numbered by the request number. You can find the request number by selecting the submission number column and typing in the number where it says, “Type text to find a filter.”

Filter by 'Submission Number' ×

Type text to find a filter

100

101

102

—

198

199

200

201

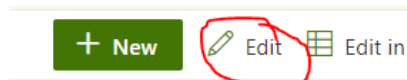
202

—

## Send Approval ☆

	Submissi... ▾	Created ▾	status
✓	102	19 minutes ago	Ne...
	258	46 minutes ago	Divis...

- Then select "edit."



## Send Approval ☆

	Submissi... ▾	Created ▾
✓	102	19 minutes

Save × Cancel Copy link

### Item properties

#### Signing Order

Enter value here

#### Approver

Enter a name or email address

#### Approval Type

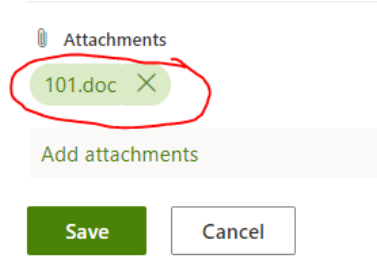
Custom

#### Attachments

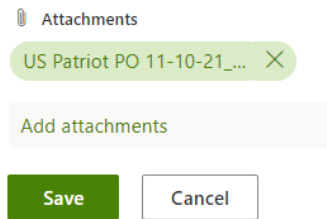
11/15/2021

- At the bottom of the list of fields, you will see "Attachments" with a paperclip. The file will appear as the submission number with ".doc" at the end of the file name. Select the item itself to review it.

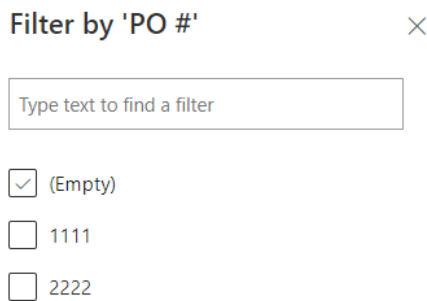
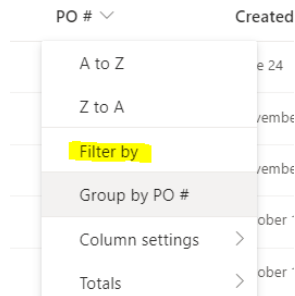




- Please note that request items currently in process and not yet in approved status will not be saved on the item itself until the workflow completes. You will be able to view any attachments before approval.



- SharePoint Document Library called “PO Library.” The list view is called “Find Request” and is located via: <https://vermontgov.sharepoint.com/teams/PublicSafety-Admin/PO%20Library/Forms/Find%20Request.aspx>
  - You can find items by filtering on purchase order number.
  - Select the column “PO #” and then select “Filter by.”



- Type in the PO number you are searching for in the empty field that says “Type text to find a filter.”

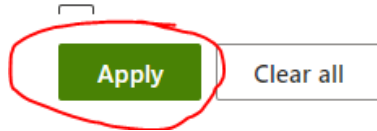
- Select the PO number you wish to view.

43265

43266

43358

- Select Apply at the bottom of the list.



PO Library > 43266

Name	PO #	Created	Vendor Name	Fiscal Year	Division
43266-CDWG.pdf	43266	March 16, 2020	CDW Government LLC (00	FY19	State Police

- You can also reprint the request by sending an email. This is helpful if things aren't formatted nicely due to development updates interfering with the submission print outs.

- Select the SharePoint list item
- Right click and select power automate
- Click "Send Email to Submitter with Result"

Send Approval ☆ > 198

Subm...	Created	status
198	October 11	Approved

Context Menu Options:

- Edit
- Edit in grid view
- Share
- Copy link
- Comment
- Copy field to clipboard
- Manage access
- Delete
- Automate >
  - Rerun Purchasing Approval
  - Send Email to Submitter with Result
  - Create a rule
- Version history
- Alert me

Business Office | Division of Fire Safety | Radio Technology Services | Vermont Crime Information Center | Vermont Emergency Management

**New** | Edit | Edit in grid view | Share | Copy link | Comment | Delete | OneSpan Sign | Automate

id Approval ☆ > 198

Subm...	Created	status	Submitter	Total	Division ...	Purchasing Appr...
198	October 11	Approved	Melissa.Wood@vermont.gov	84,909.91	KEVIN.LANE@VERMONT.GOV	Approved 10/12/2021 KEVIN.LANE@VERMONT.GOV KML 10/12/21

**Run flow**

**Send Email to Submitter with Result**  
 Owners: Jarvis, Daniel A, Harvey, Nathan f

Define a custom action to happen for a selected item. It could be sending an email, copying an item to a folder or web service, or something else. You can also...

See more >

**Email \***

Please enter an e-mail address

**Suggested People**

No results found

This flow uses SharePoint, Content Connector, Word Online (Business), Microsoft Forms, Office 365 Outlook.  
[Review connections and actions](#)

**Run flow** | Cancel

## Is this an ADS request?

If the request is an ADS request, then the ADS column will be checked if the user used the ADS request form. The vendor will also show up as ADS. If the user did not use the correct form, then you will notice that the ADS column is not checked.

ADS ▾

---

✓

---

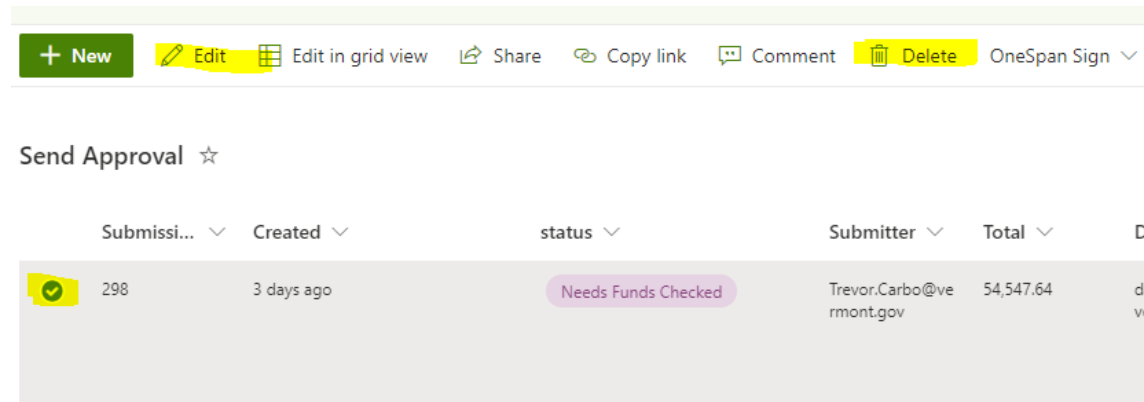
✓

## Need to cancel or delete a request?

If you find there is a request that you need to cancel or remove, you can go to the item:

### **TO DELETE:**

- 1) select the item with the checkmark in the SharePoint list
- 2) click edit
- 3) select delete

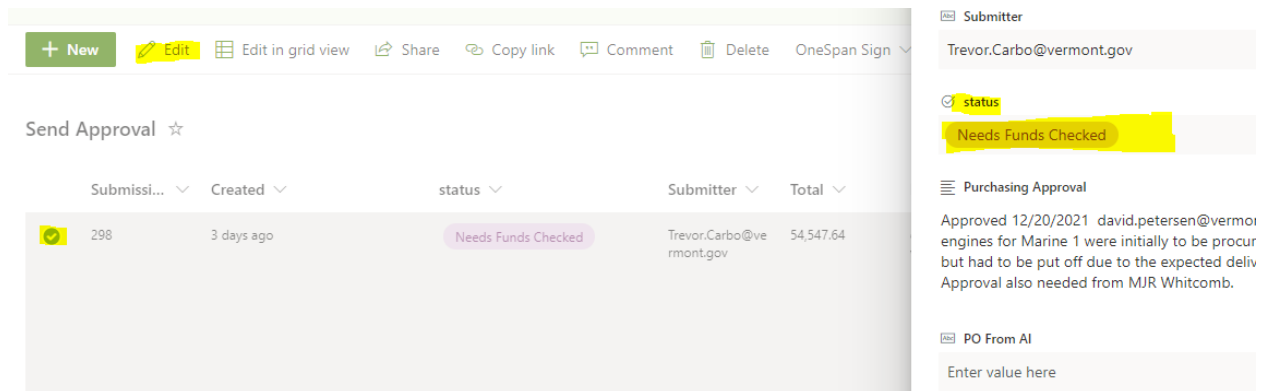


The screenshot shows a SharePoint list toolbar with the following items: '+ New', 'Edit' (highlighted in yellow), 'Edit in grid view', 'Share', 'Copy link', 'Comment', 'Delete' (highlighted in yellow), and 'OneSpan Sign'. Below the toolbar is a table with the following data:

Submissi...	Created	status	Submitter	Total	Di
298	3 days ago	Needs Funds Checked	Trevor.Carbo@ve rmont.gov	54,547.64	da ver

### **TO CANCEL:**

- 1) select the item with the checkmark in the SharePoint list
- 2) click edit



The screenshot shows a SharePoint list with the same toolbar as above. The table below it is identical to the one in the previous screenshot. To the right of the table, a detailed view pane is open, showing the following information:

- Submitter:** Trevor.Carbo@vermont.gov
- status:** Needs Funds Checked (highlighted in yellow)
- Purchasing Approval:** Approved 12/20/2021 david.petersen@vermont.gov engines for Marine 1 were initially to be procured but had to be put off due to the expected delivery. Approval also needed from MJR Whitcomb.
- PO From AI:** Enter value here