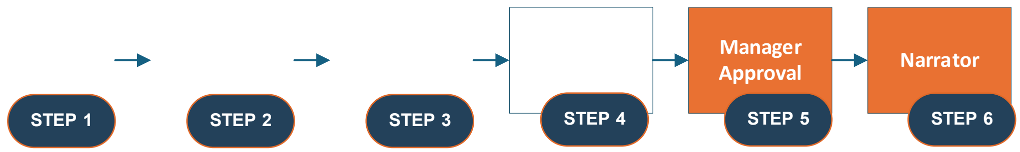
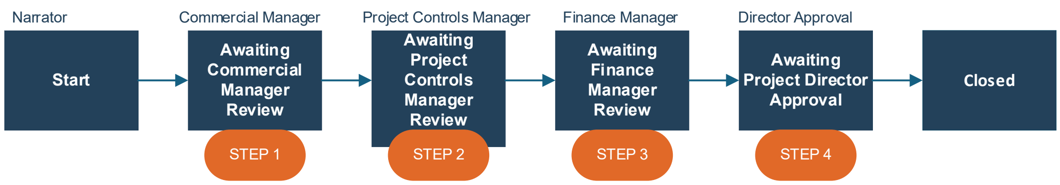
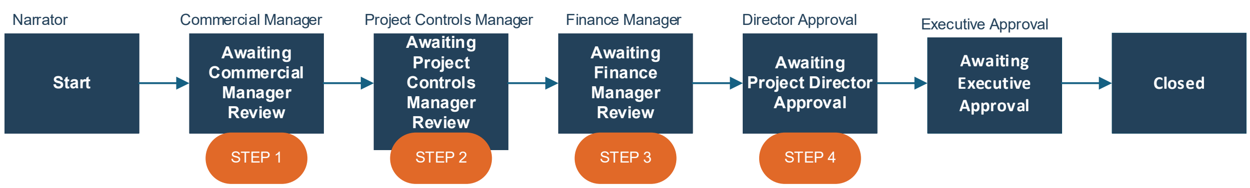


Once the PR is manually approved the Narrator will enter them into ProjectTeam and start the appropriate workflow. When the workflow is complete, a notification will be sent to the Narrator to notify the initiator of the PR.

PR Under $250,000



PR Over $250,000



To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a Specific section.

Creating a Purchas Request

Start the Workflow

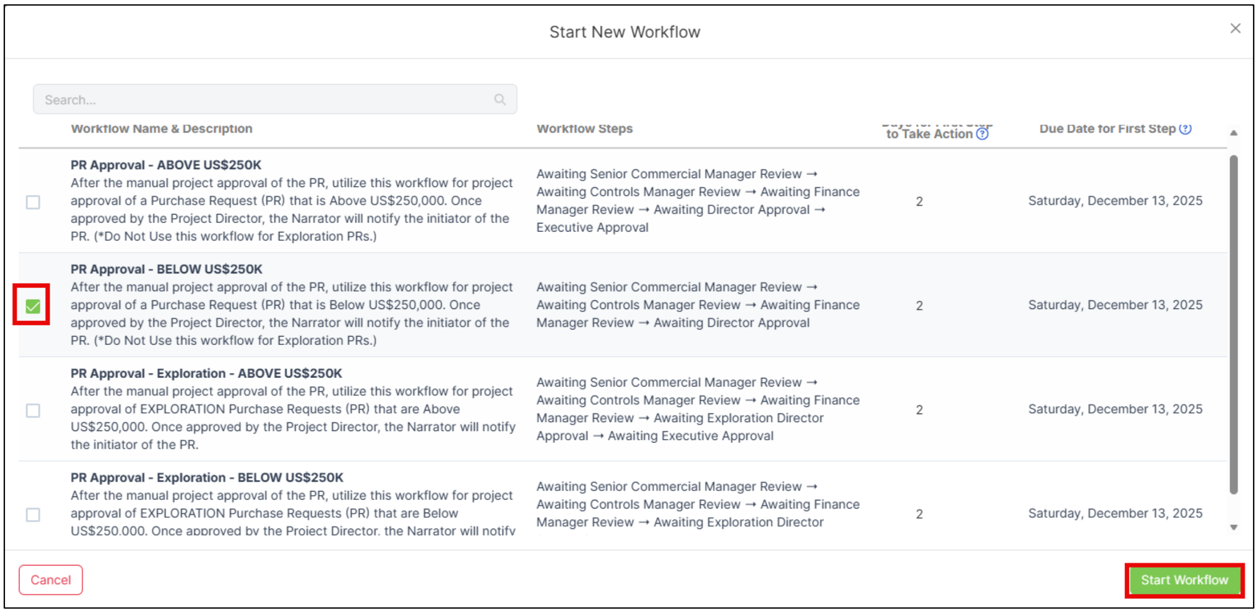
Additional Resources

CREATING A PURCHASE REQUEST

1) Click the **New** button from the Purchase Request log view.
2) **Save** the form.
3) Upload any applicable **Attachments.**
4) Create a **Reference Link** to the **Sole Source** form, if applicable.

START THE WORKFLOW

1) After a record is saved, a user can navigate to the Workflows panel of the open record to start a new workflow.
   a. Click **Start New** in the Workflows panel of an existing record.
   b. Check the box beside the applicable workflow:
      i. PR Approval - **BELOW** US$250K
      ii. PR Approval - **ABOVE** US$250K
      iii. PR Approval - **Exploration** - **ABOVE** US$250K
      iv. PR Approval - **Exploration** - **BELOW** US$250K
   c. Click **Start Workflow** to send the first workflow step to the PM for review and approval. *See* ***Approve for SAP Submittal*** *in this QRG.*



2) The Narrator must notify the Initiator of the PR when the workflow is complete.

RELATED RESOURCES

Help Pages:

Start a workflow on a document

Adding Attachments to Forms

Create a Reference Link

support@projectteam.com
(703) 961-1007

Additional Resources:

Attachments

Reference Links

support@projectteam.com
(703) 961-1007