

PERFORMING APPROVAL TASKS

This lesson is geared for individuals responsible for approving purchase requisitions and purchase orders. The goal of this lesson is to educate departmental approvers, buyers, and all other types of approvers on how to review, approve, and reject line items and orders in Bronco eBuy Sciquest Site.

Key Concepts

APPROVER

The term **approver** is used to describe someone that is responsible for reviewing and evaluating purchase orders and purchase requisitions. The term approver is also used to describe someone who has the ability to view departmental or organization-wide order history. Approvers consist of departmental approvers, buyers, and more.

Before an approver can perform approval-related tasks, he or she must be assigned to the appropriate shared workflow folder.

APPROVAL BASICS

- Approvers can choose whether or not to receive email notification when an order requiring approval lands in their "queue." This is set up via the user's profile and is detailed on one of the exercises in this lesson.
- There are two types of approvals: 1) Manual approvals, requiring human intervention, and 2) System approval, which is automatic). This section of the training guide discussed how to approve/reject orders requiring a manual review.
- An entire requisition can be approved or one or more line items in the requisition can be rejected. If part of a requisition is rejected (one or more line items), the remaining line items continue in the process.
- Comments and attachments can be sent "back and forth" between requisitioner and approvers during the approval process.
- Requisitions can be returned from an external ERP system, including Banner, to the requisitioner for updates and re-processing. Additionally, requisitions can be marked as approved or rejected from the third-party system.
- If a line item or the entire requisition is rejected (by an individual or the system), the rejection notice will show up in **PO History**. If the user is set up to receive email notifications for rejections, they will receive an email also. This email contains the rejection note entered by the approver.
- Some types of approval are directed at a single individual and no one else can approve the order (unless a substitute is set up or the order forwarded). Examples of this are for financial approvals or "reports to" approvals.
- Other approval queues can be assigned to multiple approvers. As an organization or department, you can determine how the approvals are handled. For example, you may have a primary approver and someone else may be assigned as a back-up approver OR

two people can be assigned to the queue and each individual “takes” orders as their schedule allows. Examples of this type of setup include shared workflow folders, form approval, and more. (Required)

THE APPROVALS SCREENS

The approvals screens are accessed when an approver is reviewing a purchase requisition, purchase order, and sales orders (for Supplies Manager). There are approvals screens for each “type” of approval (PR, PR, Fulfillment, and Invoice), each of which can be accessed through the **approvals** navigation tab... Depending on your site setup and your permissions, you may be able to see one, two, three, or all of these tabs. In the example below, the requisition and purchase order tabs are available to the approver.

The screenshot displays the 'Approvals Screens' interface. At the top, there are navigation tabs: 'requisition', 'purchase order', 'Requisition outbox', and 'Purchase order outbox'. Below the tabs, there is a 'Select another approver' dropdown set to 'My Approvals' and a 'Go' button. A 'Filters' section is visible, with a dropdown menu open showing options: 'All Pending Requisitions', 'All Pending Requisitions', 'Urgent Approvals', 'Unassigned Approvals', 'Future Approvals', and 'Manual Filter'. Below the filters, there are links for 'Show requisition details' and 'Assign Substitute'. An 'Apply Action to Selected PR(s)' dropdown is set to 'Approve/Complete' with a 'Go' button. The main content area is divided into two sections: '- My PR Approvals' and '- Non-catalog'. Each section has a 'Results per page' dropdown set to '10' and a 'Requisitions Found' count. The '- My PR Approvals' section shows 'Requisitions Found: 0' and a table with columns: Requisition No., State, Priority, PR Date/Time, Requisitioner, Amount, Action, and Select. The '- Non-catalog' section shows 'Requisitions Found: 1' and a table with columns: Requisition No., Approver, State, Priority, PR Date/Time, Requisitioner, Amount, Action, and Select. The table in the '- Non-catalog' section contains one row with the following data: Requisition No. 1020, Approver Ian Blackburn, State Assigned, Priority Normal, PR Date/Time 9/25/2003 2:15 PM, Requisitioner Ian Blackburn, Amount 2,317.50 USD. There are 'Assign Substitute' and 'Apply Action to Selected PR(s)' (set to 'Assign') buttons below each table.

The Home Page: Snapshot of Documents Requiring your Approval

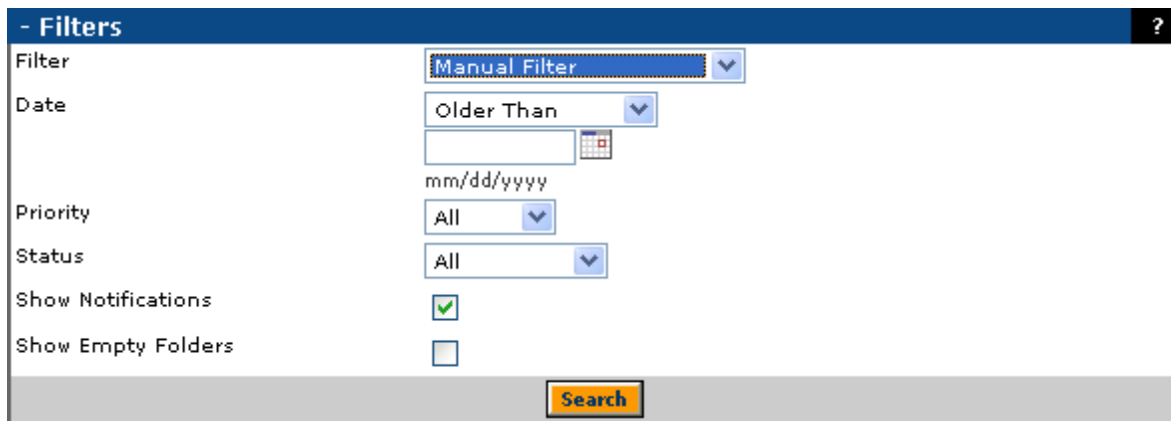
The **Action Items** area of the home page is where many users go to access their requisitions (in process and completed), check to see if there are any documents requiring approval and review, and more. This section of the home page is located on the upper, left side of the screen.

The Approvals section of the Action Items box shows approvals that have been assigned to the approver and unassigned approvals. From here, an approver can see carts that

have been assigned to him/her, requisitions, purchase orders, and invoices, as shown below. To go directly to the approvals page, click the blue link.

Details and “Tips and Tricks” for reviewing documents:

- The folder at the top of the screen is the **My Approvals** folder. Depending on the screen you are on, it can hold PRs, POs, when a document is in this folder, the approver owns it. Only an administrator can remove a document out of this folder. Documents can automatically be placed in the “My Approvals” folder for financial workflow or moved from a shared workflow folder and into the My Approvals folder. When an order is moved from a shared folder to someone’s folder, the approver is indicated to all users from the shared folder.
- **Shared workflow folders** are folders that can be accessed by one or more approvers and display under the My Approvals folder. In some cases, there will only be one approver per folder, but more can be set up if needed. The actual folders that display for an approver is dependent on what they are responsible for approving. Therefore, an approver might see one, two, or twenty folders.
- Use the **filters** at the top of the screen to view specific types of approvals. From here, you can determine whether you want to view all shared folders (with or without orders waiting for approval), whether you view notifications, priority, status, and date range.



- Filters	
Filter	Manual Filter
Date	Older Than [Date Input] mm/dd/yyyy
Priority	All
Status	All
Show Notifications	<input checked="" type="checkbox"/>
Show Empty Folders	<input type="checkbox"/>
Search	

Click the **show requisition details** link to view more detailed information about the document.

- To move multiple documents to your **My Approvals** folder, click the Select checkbox to the right of each document, and then select **Assign to me in the drop-down box**.

□ Use the Drop-down box in the upper right-hand corner of the screen to perform a number of functions, including automatically approving orders, moving orders back to the shared folder, and more

RECEIVING WORKFLOW NOTIFICATION

Approvers are notified of requisitions or orders requiring attention in one of two ways:

1. The **Actions Items** □ **Approvals** section on the Home Page provides approvers with a summary of the documents available for review in workflow.
2. [Approvers are notified via email when a document has been routed to their personal folder or to one of their assigned workflow folders. This email contains a link that takes the recipient directly into the appropriate approval area. It is important to remember that multiple people may receive the same email if more than one approver is allowed to approve the same type of order.](#)

Note: Users must have the proper email notifications set up in their profile to receive email notifications for workflow approval.

MOVING DOCUMENTS (PR/PO/) TO MY APPROVALS FOLDER

Some requisitions, orders, and invoices requiring review automatically go to your approvals folder. If an approval step CAN be shared by more than one person, the document must be assigned to the approver before it is reviewed, updated, etc. By placing the pending document (PR, PO, or Invoice) in the My Approvals folder, it signifies that the approver is responsible for the current step of workflow for the item(s). If multiple approvers are assigned access to a folder, then, by moving an item into the My Approvals folder, the approver is indicating their intent to review (approve or reject) the order.

Note: Requisitions that require financial approval by a specific approver will be placed automatically in the **My Approvals** folder.

Step by Step

1. Reference the **Action Items** □ **Approvals** section on the home/shop tab.
2. Click on the appropriate item in the **Unassigned Approvals** section (purchase order, invoices, etc). You will be taken to the appropriate sub-tab in the approval navigation tab.
3. To move one document to your approval folder:
 - a. Select a document from an approval folder with a state of **Not Assigned**. Note: Documents that have been assigned will not have the Assign link available.
 - b. Click the **Assign** link in the Action column to move the document to the **My Approvals** (PR or PO) folder. The document is now in the user's personal approvals folder, and the approver's user name is now listed under the Approver column as shown below.

To quickly move multiple documents to your approval folder:

c. Enable the **Select** checkbox for the individual items that you would like to assign to your approvals folder OR enable the top Select checkbox to enable **ALL** available line items. After you have selected which documents to assign, select the Assign option from the Apply Action drop-down box (as shown below).

Apply Action to Selected PR(s) Assign Go

Assign
Approve/Complete
Forward...
Place PR On Hold
Add Notes to History

Requisitions Found: 3

Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
Ashlee Trainer	Assigned	Normal	11/8/2006 10:06 AM	Standard Requisitioner	145.00 USD		<input type="checkbox"/>
	Not Assigned	Normal	11/8/2006 9:26 AM	Derrick Graham	180.00 USD	Assign	<input checked="" type="checkbox"/>
	Not Assigned	Normal	11/3/2006 11:58 AM	Derrick Graham	85.00 USD	Assign	<input checked="" type="checkbox"/>

After you have moved the item(s) to your approvals folder, the next step is to review the requisition or purchase order for processing. Refer to the next exercise for further information on approving a requisition.

- Final Review

Results per page 10 Requisitions Found: 3 Page 1

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action
99754 view	Ashlee Trainer	Assigned	Normal	11/8/2006 10:06 AM	Standard Requisitioner	145.00 USD	
99488 view		Not Assigned	Normal	11/8/2006 9:26 AM	Derrick Graham	180.00 USD	Assign

REVIEWING A WORKFLOW DOCUMENT

An approver can review all the details of a requisition, purchase order, revised purchase order or invoice as part of the approval process. The approver can review this information by following the steps described in this exercise.

Go to the **approvals navigation** tab.

1. Go to the appropriate **sub-tab**, depending on whether you are reviewing a purchase order, purchase requisition, or an invoice.
2. [In most cases, you will approve documents after assigning them to yourself](#). If the document needing approval is not found in that folder, refer to the previous exercise to move it to this part of the screen.
3. From the My Approvals table, select the **view...** link to the right of the **requisition number** to access the details of the document.
4. Once you open the document, notice how it looks very similar to a cart that is submitted. The primary difference is that in some cases the data allowed to edit is limited, and the PR/PO workflow has been updated with any previous steps. The next step is to review and edit the document as needed. NOTE: Supplier information cannot be modified on a PO.
5. Click the **Save Updates** button to save all changes. Refer to the next few to approve or reject the document or line items.

APPROVING A WORKFLOW DOCUMENT

The approver can quickly complete the approval process once the review of the document is complete. This exercise explains how to approve PR, PO, revised PO, and Invoice documents in workflow.

Step by Step

The goal of the exercise is to demonstrate approving purchase requisitions and purchase orders in Select Site. The assumption in this exercise is that the document (requisition or order) has been accessed and reviewed or is ready for approval.

1. QUICK APPROVALS: If you do not need to open a requisition or order before it is approved:
 - a. Click the **Approve** button for an order that is found in your My Approvals folder.
 - b. If one or more orders are in a shared folder, click on the Select checkboxes for the appropriate documents, then select **Approve/Complete** from the Action drop-down list box.
2. STANDARD APPROVALS: With standard approvals, the approver opens the order and reviews the information and makes any changes if needed, and then approves the order.
 - a. Open the document (requisition or order).
 - b. Review the information and make updates if needed.
 - c. Click the **Go** button at the top of the screen. Make sure the **Approve/Complete** option is selected.

REJECTING A WORKFLOW DOCUMENT

To reject a requisition or order, Approvers now have the ability to reject all lines of a requisition in one single action rather than line by line. Select Site also allows you to delete select line items from a requisition or order. This exercise explains how an approver can reject documents and lines from PR and PO documents.

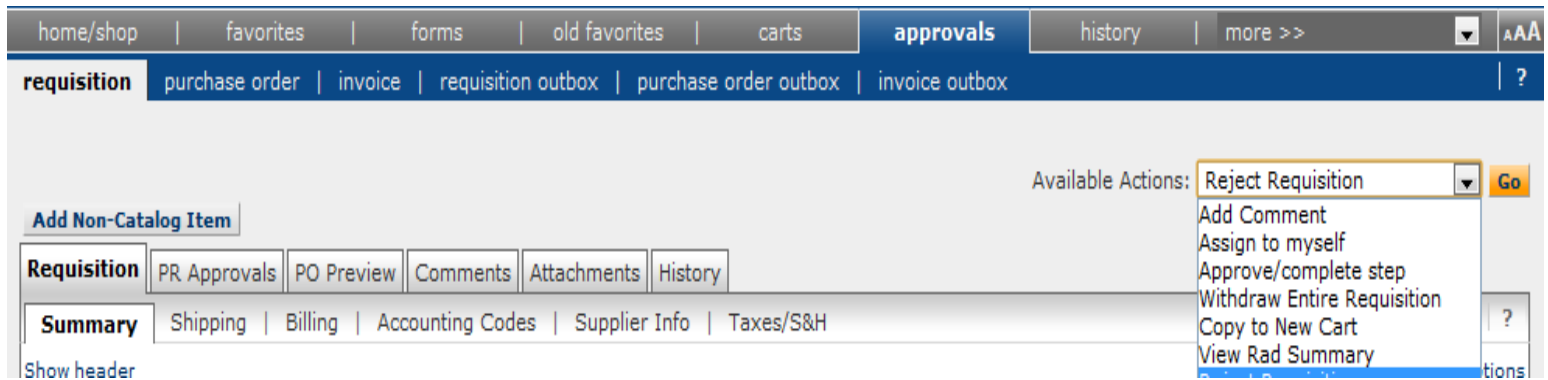
NOTE: If the approver enters a rejection note, this information will be sent with the rejection email to the requisitioner.

NOTE: Use caution if you are reviewing a purchase order that has been created and revised (change order). Understand that by rejecting a PO revision, the original PO is also rejected.

Step by Step

The goal of the exercise is to demonstrate rejecting the entire PR document.

1. Open the requisition or order (refer to previous exercises). Note: The approver is required to open an order before it can be rejected.
2. Go to the Available actions drop down at the top of the Requisition and select Reject Requisition and select the **Go** button.



Enter a rejection reason in the comment pop-up box.

Select the **Reject Requisition** button to save the comment and reject the requisition. The rejection is not finalized until the workflow step is complete.

Step by Step

The goal of the exercise is to demonstrate rejecting lines on a requisition.

1. Open the requisition or order (refer to previous exercises). Note: The approver is required to open an order before it can be rejected.

2. Select one or more line items to reject by clicking the checkbox to the right of the price. Alternately, click the checkbox in the column header row for EACH supplier to select all of the lines for a supplier.
3. Enter the reason in the comment pop-up box.
4. Select the Reject Requisition button to save the comment and reject the requisition. The rejection is not finalized until the workflow step is complete.

Step by Step information for forwarding a PR (Purchase Requisition)

The goal of the exercise is to demonstrate forwarding a PR and PO to another SelectSite user.

1. Access the Approvals section of the application (via the home page, an email, or the approvals navigation tab).
2. OPTION 1: If you know you want to forward a requisition or order that has not been reviewed (opened):
 - a. Enable the **Select** checkbox on the far right side of the folder where the document resides.
 - b. Select the **Forward...** option from the drop-down box and click the **Go** button. Skip to the next step.

Apply Action to Selected PR(s)		Assign		Go
		Assign		
		Approve/Complete		
		Forward...		
		Place PR On Hold		
		Add Notes to History		
Time	Requisitioner	Amount	Action	select
6 10:06 AM	Standard Requisitioner	145.00 USD		<input type="checkbox"/>
16 9:26 AM	Derrick Graham	180.00 USD	Assign	<input checked="" type="checkbox"/>

OPTION 2: If you realize you would like to forward a requisition or order once it has been opened (accessed):

- c. Select the **Forward...** option from the Available Options drop-down box and click the **Go** button. Skip to the next step.
3. Enter specific user criteria to find the recipient of the forwarded requisition.
4. Click the **Search** button.
5. Select the appropriate user using the radio button to the left of the user's name.
6. Click the **Choose Selected User** button to continue.
7. Enter a note for the user that describes the reason to forward the requisition
8. Click the **Forward** button.

ASSIGNING A SUBSTITUTE APPROVER

The event an approver is absent or does not have access to the application, he/she can designate another approver as their substitute. The substitute is able to review documents routed to the original approver. Substitutes are assigned at the folder level from the Approvals screen. This exercise describes how to set up a substitution in workflow.

Step by Step

The goal of the exercise is to assign a substitute approver for an approver's purchase requisitions and/or orders. Keep in mind, you can choose to use a substitute approver for documents in all folders (shared folders, My Approvals, etc) or a select folder.

1. Access the Approvals section of the application (via the home page, an email, or the approvals navigation tab).
2. Determine which folder(s) that you would like to set up a substitute approver for and follow the directions below for EACH folder:



3. Select the **Assign Substitute** link in the upper right-hand corner of the **My PR Approvals** section. Please note that substitutes can be assigned to any folder to which the original user has access. The procedure is the same as shown in this exercise except that a user selects the **Assign Substitute** link next to the corresponding folder.
4. Enter specific user criteria to find the recipient of the forwarded requisition.
5. Click the **Search** button.
6. Select the appropriate user using the radio button to the left of the user's name.
7. Click the **Choose Selected User** button to assign that individual as the substitute.
8. Click **End Substitution** to remove the substitution setting for that folder.

RETURNING A REQUISITION TO THE REQUISITIONER

Occasionally, an approver may want to return a requisition to the original shopper or requester for updates to custom fields or line details. This task allows approvers to return instead of rejecting a purchase requisition. When a requisition is returned it becomes a draft cart and is no longer visible as a requisition (via history, etc). The returned requisition can be updated by the requisitioner and resubmitted into workflow and all previous approval information and comments will be available via History. The returned requisition will restart workflow from the beginning regardless of the step it was returned from.

Additional details:

- Approvers that have the ability to Reject Requisitions will now be able to Return Requisitions.
- Requisitions can be returned at any point in the requisition approval process.
- When a requisition is returned it becomes a draft cart and is no longer visible as a requisition.

Changes made to the requisition while in a draft cart will be recorded in history.

- End users will have access to view returned requisitions from their homepage and in a new section in the Draft Carts tab called "my returned requisitions".

End users will not be able to delete returned requisitions; however they can choose to withdraw them.

- Approvers will see a new indication of resubmitted requisitions in their approval queue.
- Users which have enabled the "PR Rejected" notification will also be notified of Returned documents via email notification.

Step by Step

This task can be performed by approvers for a purchase requisition. NOTE: PO and Invoice documents cannot be returned.

1. Access the purchase requisition, and assign it to yourself (for review).
2. From the **Available Actions** drop-down box in the upper right-hand corner, select **Return to Requisitioner**, and then click the **Go** button
3. Enter the **reason** for the return. This note will be available via the Comments and History tab and will be sent in the email to the requisitioner.

Excerpt taken from the Scquest Training Manual