

MARKETPLACE Approver

This document will explain what set-up is needed for the Approver and how to respond to requisition that are you the queue.

What needs to be set-up in your “Profile”:

Select the *profile* tab

Select the sub-tab *Email Preferences* under the User Setting tab.

Select the item(s) that you would like to receive notification about.

Select **Save**

Suggested Email Preferences:

- PR pending Workflow approval

Select the *Purchasing* tab

You will be on the *Custom Fields – Header (int.)* sections. The *Header (int.)* and *Codes* are required sections that have to be filled in.

Follow the steps below to fill in the Requestor Name, Phone and e-mail.

Custom Field Name	Default Value	Description	Edit Values
Requestor Name	No Default Value		Edit
Requestor Phone	No Default Value		Edit
Requestor e-mail	No Default Value		Edit

1. Select **Edit**
2. Select **Create New Value**
3. Type the appropriate information into the Value field
4. Select the default box
5. Select **Save**
6. Select **Close**
7. Repeat steps 1 – 6 for Phone and e-mail.

Custom Field Name		Default Value
Requestor Name		Jacki Train
Requestor Phone		5-5555
Requestor e-mail		isttrain@umdnj.edu

How to Approve

Select the approvals tab

Under this tab you will see the approval queue's that you have access to. There are two main areas. 1. The area that the assigned requisitions appear (My PR Approvals) and then; 2. The area the requisitions are waiting to be approved. Each approval queue works independently (ie, assign substitute and number of pages)

The screenshot shows the 'Approvals' tab selected in the navigation menu. Below the menu, there are two main sections for approval queues. The first section, 'My PR Approvals', is currently empty. The second section, 'IT Approval', shows a table of requisitions. The first requisition in this table has a status of 'Not Assigned'.

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
326958		Not	Normal	8/18/2009 11:42 AM	Jianfeng Wang	285.85 USD	Assign	<input type="checkbox"/>

If a requisition or part of the requisition needs to be rejected or reviewed in detailed; it has to be assigned to you.

To assign a req:

1. Put a check mark in the box to the right of the requisition.
2. Once you have selected all the requisition from the current page that you need to assign to yourself. Then at the top of the queue is *Apply Action to Selected PR(s)* drop down box. Select *Assign*
3. Click the **Go** button

The screenshot shows the 'IT Approval' queue with a requisition that has a 'Not Assigned' status. The 'Go' button in the top right corner of the queue is circled in red.

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
328434		Not Assigned	Normal	8/25/2009 12:05 PM	Catrina Fowler	564.22 USD	Assign	<input checked="" type="checkbox"/>

Once the go button is selected the requisition will be place under “My PR Approvals”. As well as the main queue assigned out.

The screenshot shows the 'My PR Approvals' queue with a requisition that has been assigned. The 'Go' button in the top right corner of the queue is circled in red.

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
299756		Active	Normal	5/21/2009 11:12 AM	Linda Gary	83.08 USD	Approve	<input type="checkbox"/>

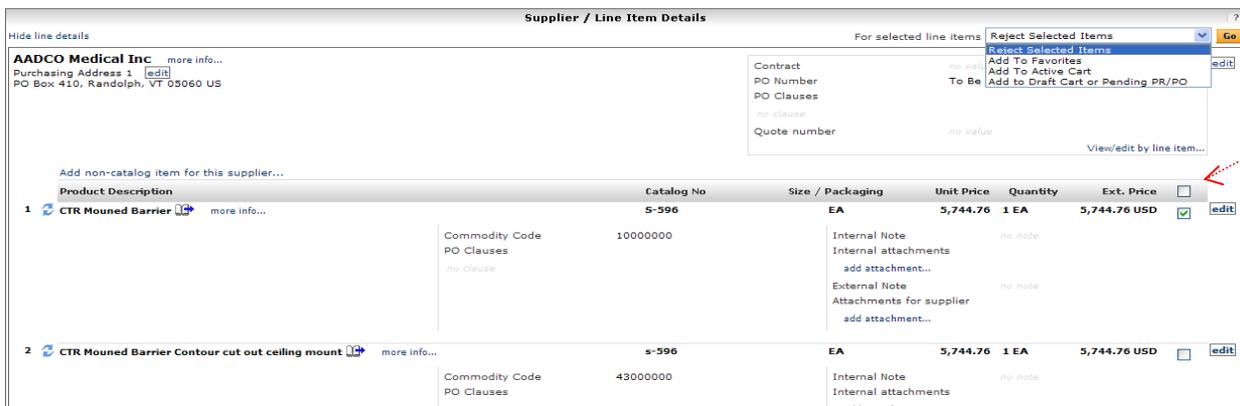
Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
299756	Catrina Fowler	Assigned	Normal	5/21/2009 11:12 AM	Linda Gary	83.08 USD		<input type="checkbox"/>

Additional Features after *assigning* a requisition:

When a requisition is assigned to an Approver they will be able to edit the req, if needed. They will be able to add attachments, edit the accounting information. However if the index number is changed the original requestor has to have access to that index number.

To reject a line item or entire req:

1. From the *My PR Approval* area select the *view* link next to the req number (review the “To assign a req” from above)
2. After the req opens, scroll down to the *Supplier / Line Item Details* area
3. Put a check mark in the box to the right of the line item that needs to be rejected
4. Then from the *Form the select line item* drop down box; select *Reject Select Items*
5. Click the  button



Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 CTR Mounded Barrier	5-596	EA	5,744.76	1 EA	5,744.76 USD <input checked="" type="checkbox"/>
2 CTR Mounded Barrier Contour cut out ceiling mount	s-596	EA	5,744.76	1 EA	5,744.76 USD <input type="checkbox"/>

Note: Approver has the ability to reject individual line item or the entire req. If you want to select all the items in the requisition then put a check mark to the right of *Ext. Price*

6. An *Add Note* box will appear. Type in a clear reason on why the item is being rejected
7. Click the  button
8. Then from the *Available Action* drop down box (top, right, corner) select *Approve / Complete Step*
9. Click the  button

To approve a req:

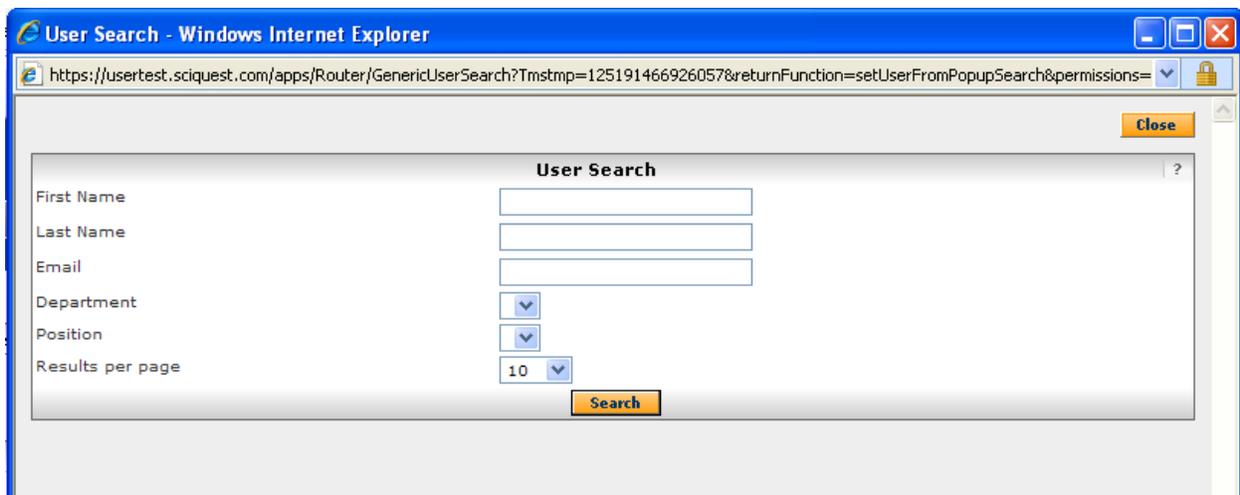
1. Put a check mark in the box to the right of the req number
2. Then at the top of the queue is *Apply Action to Selected PR(s)* drop down box. Select *Approve / Complete*
3. Click the  button

Note: Approving can be done from the main queue or from *My PR Approvals*.

Assign a substitute:

You would only assign a substitute for a queue that someone is not already in. You have to do this for each approval queue

1. Select the *Assign Substitute* link above the queue.
2. An *User Search* box will appear; type in the person last name
3. Click the  button



User Search - Windows Internet Explorer

https://usertest.sciquest.com/apps/Router/GenericUserSearch?Tmstmp=125191466926057&returnFunction=setUserFromPopupSearch&permissions=

Close

User Search ?

First Name

Last Name

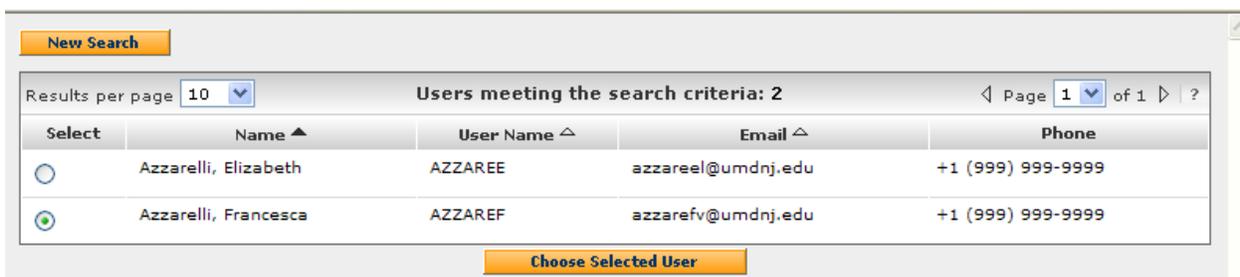
Email

Department

Position

Results per page 10

4. Then select the radio button for the person
5. select the  button

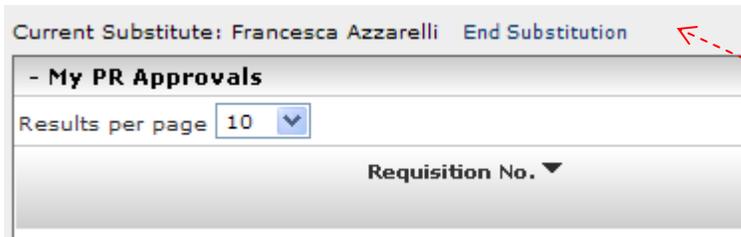


New Search

Results per page 10 Users meeting the search criteria: 2 Page 1 of 1 ?

Select	Name ^	User Name ^	Email ^	Phone
<input type="radio"/>	Azzarelli, Elizabeth	AZZAREE	azzareel@umdnj.edu	+1 (999) 999-9999
<input checked="" type="radio"/>	Azzarelli, Francesca	AZZAREF	azzarefv@umdnj.edu	+1 (999) 999-9999

6. Then the substitute's name will appear above the queue



Note: The substitute will now get email notification about the queue and you will not. To remove the substitute; select the *End Substitution* link next to the name.

To Un-assign a req from *My PR Approval*

1. Put a check mark in the box to the right of the req number
2. Then at the top of the queue is *Apply Action to Selected PR(s)* drop down box. Select *Return to Share Folder*
3. Click the **Go** button

