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

V DENTISTRY OF INEW JERSEY							
home/shop favorites for	ms carts	app			History	profile	
User Settings Purchasing Permissions History							
User Identification Personal Settings Roles	Department Permissions	Email Prefe	rences	Navigatio	n Setup		
		cinal Prefe					
							1
PR submitted-into-Work	cftow — — — — — — — — — — — — —						
I DR populing Workflow p	aproval						
PR Workflow Notification	Email to approvers that in th	eir PR workflo	w folders	there are r	newX		
PR line item(s) rejected	requisitions requiring their a	pproval.				-	
	Do not want to see help on mou	se over? Clic	Sugg	ested	Email	Preference	s:
PR rejected/returned			00	,			
			0 P	R pend	ling Wa	orkflow	
					1		
			a	pprova	1		

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.

User Settings Opermissions History								
Custom Fields Financial Approvers Purchasing/Approval Limits Payment Options Addresses Product Views Punchout Access ?								
Header (int.) Codes								
	2							
Custom Field Name	Default Value	Description	Edit Values					
Requestor Name	No Default Value							
Requestor Phone	No Default Value							
Requestor e-mail	No Default Value							

- 1. Select Edit
- 2. Select Create New Yalue
- 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.

User Settings Purchasing Permissions History								
Custom Fields Financial Approvers Purchasing/Approval Limits Payment Options Addr								
Header (int.) Codes								
Custom Field Name	Default Value							
Requestor Name	Jacki Train							
Requestor Phone	5-5555							
Requestor e-mail	isttrain@umdnj.edu							

Value

Description Default New Value

Save

I

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)

DENTISTRY OF NEW JERSEY	Approvais Re	quisitions						Search for Condace		
home/shop	favorites	forms	carts		approvals		History	profile	mo	re >> 💌 🙁
requisition purchase ord	er requisition outbox	purchase order outbox								?
+ Click to filter requisi	tions				?					
Hide requisition details										
Assign Substitute							Apply	y Action to Selected PR(s) Approve/Comp	olete 🔽 Go
- My PR Approvals	1									?
Results per page 10 💌				Requisitions	Found: 0				4 F	Page 1 🚩 of 1 👂
	Requisition No. 🔻		State 🛆	Priority $ riangle$	PR Date	/Time 🛆		Requisitioner $ riangle$	Amount 🗠	Action Select
Assign Substitute	0						A	Apply Action to Selected	PR(s) Assign	Go Go
- IT Approval	2									?
Results per page 10 💙				Requisitions	Found: 70				4 F	Page 1 💙 of 7 🕨
	Requisition No. 🔻		Approver $ riangle$	State △	Priority $ riangle$	PRI	Date/Time 🗠	Requisitioner 🗠	Amount 🗠	Action Select
326958 view				Not	Normal	8/18/	2009 11:42 AM	Jianfeng Wang	285.85 US	SD Assign 🥅

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 **Gold** button

Assign Substitute Apply Action to Selected PR(s) Assign								Go	
- Department 91705 under 0.01								?	
Results per page 10 💙		R	equisitions F	ound: 24			4 Pag	e 1 💙	of 3 🕨
	Requisition No. 🔻	Approver $ riangle$	State 🗠	Priority \triangle	PR Date/Time 🛆	Requisitioner 🗠	Amount 🗠	Action	Select
328434 view			Not Assigned	Normal	8/25/2009 12:05 PM	Catrina Fowler	564.22 USD	Assign	
Cart Name:	2009-08-25 BARKERCA 01		S	uppliers:	Allied Office Pro	d			
Cart Description: No. of line items:	1		0	This PR has n	otes				

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

- My PR Approvals									2
Results per page 10 💙			Requisitions	Found: 4			₫ Pag	je 1 💙	of 1 D
	Requisition No. 🔻	State 스	Priority 🗠	PR	Date/Time 🗠	Requisitioner 🗠	Amount 🗠	Action	Select
299756 view		Active	Normal	5/21/	2009 11:12 AM	Linda Gary	83.08 USD	Approve	
Cart Name: Cart Description: No. of line items:	Linda's address labels 2			Suppliers:	Staples Strategi	c / Corporate Express			
Assign Substitute						Apply Action to Selected PR	(s) Assign		Go
- Grant 10715									?
Results per page 🛛 10 🛛 🛩			Requisitions	Found: 17			√ Pag	e 1 💙	of 2 🕨
R	equisition No. 🔻	Approver $ riangle$	State 🗠	Priority 🗠	PR Date/Time $ riangle$	Requisitioner 🛆	Amount 🗠	Action	Select
299756 view		Catrina Fowler	Assigne	d Normal	5/21/2009 11:12 AM	Linda Gary	83.08 USD		
Cart Name: Cart Description:	Linda's address labels			Suppliers:	Staples Strategi	c / Corporate Express			
No. of line items:	2								

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 **Gold** button

	Supplier	/ Line Item Details							?
Hide line details				For selected lin	ne items 🖡	Reject Selecte	ed Items	1	Go
AADCO Medical Inc more info Purchasing Address 1 edit PO Box 410, Randolph, VT 03060 US			Contract PO Number PO Clauses no clause Quote number		no valu To Be	eject Selecte dd To Favori dd To Active dd to Draft C	ed Items ites Cart Cart or Pending Pf	R/PO	edit
Add non-catalog item for this supplier		Catalog No.	Size / Pa	ackaging	Unit Price	Quantity	View/edit by lir	ie item.	K
1 🔮 CTR Mouned Barrier 🕼 more info		S-596	E/	A	5,744.76	1 EA	5,744.76 USD		edit
	Commodity Code PO Clauses no clause	1000000	II II E A	Internal Note Internal attachmen add attachment External Note Attachments for su add attachment	nts Jpplier				
2 🦉 CTR Mouned Barrier Contour cut out ceiling mount 🍱 🛛 more info		s-596	E/	A	5,744.76	1 EA	5,744.76 USD		edit
	Commodity Code PO Clauses	4300000	I) I)	internal Note Internal attachmen	nts				

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 **Reject Line Item** 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 **Gold** 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 **Search** button

🖉 User Search - Windows Internet Explorer	
https://usertest.sciquest.com/apps/Router/GenericUserSea	arch?Tmstmp=125191466926057&returnFunction=setUserFromPopupSearch&permissions= 💌 🔒
	Close
	User Search ?
First Name	
Last Name	
Email	
Department	
Position	
Results per page	10 💙
	Search

- 4. Then select the radio button for the person
- 5. select the Choose Selected User button

New Sear	rch					
Results per page 10 🕑 Users meeting the search criteria: 2 🕴 Page 1 🕑 of 1 🕅 🕯						
Select	Name 📥	User Name 🗠	Email 🗠	Phone		
0	Azzarelli, Elizabeth	AZZAREE	azzareel@umdnj.edu	+1 (999) 999-9999		
۲	Azzarelli, Francesca	AZZAREF	azzarefv@umdnj.edu	+1 (999) 999-9999		
Choose Selected User						

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

Current Substitute: Francesca Azzarelli End Substitution 🜾	
- My PR Approvals	
Results per page 10 💌	
Requisition No. 🔻	

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 **Goo** button

