



APPROVER TRAINING

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INTRODUCTION


The purpose of this training guide is to familiarize you with the Approver role in Bear e-Buy.

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*Screen Shots may differ due to user permissions

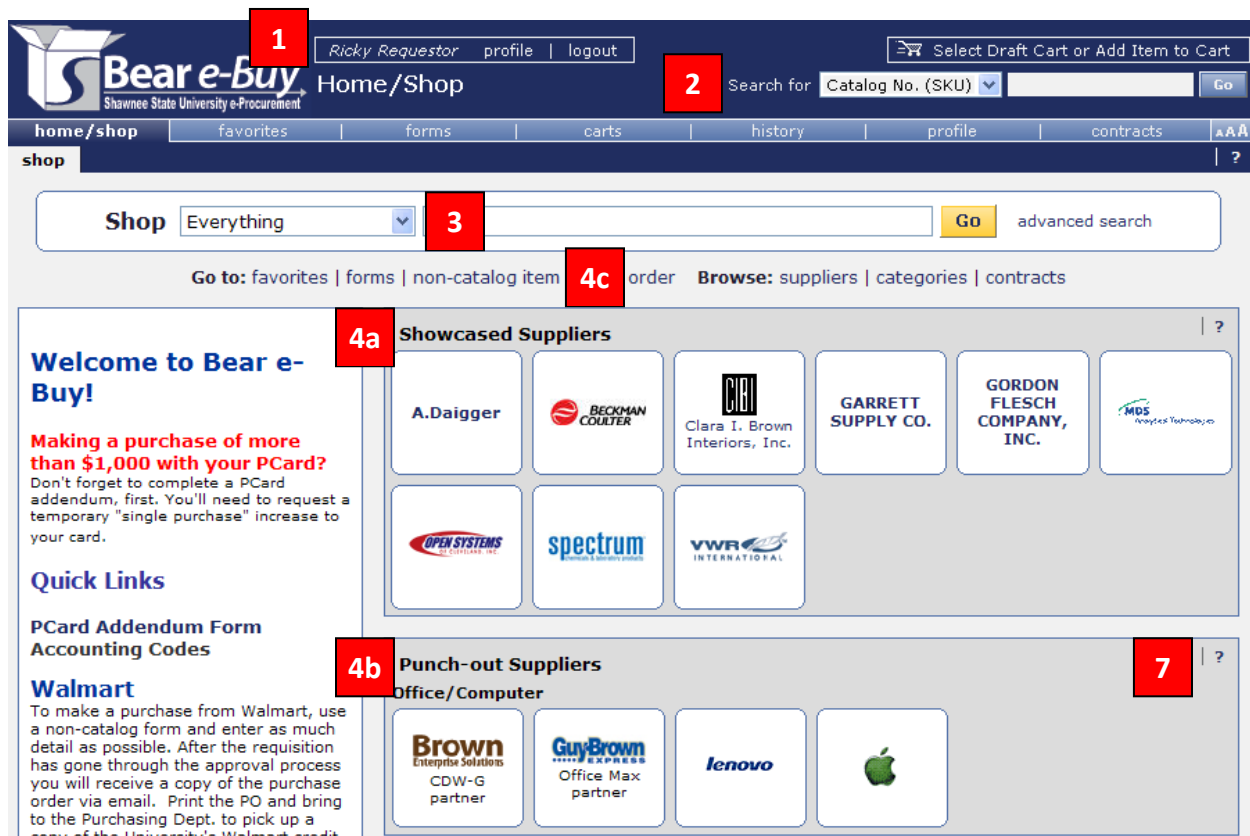
Bear e-Buy is Shawnee State University's e-Procurement product and allows shoppers/requestors to shop for all supplies electronically. Bear e-Buy connects to online vendor catalogs, customized vendor websites, and provides an electronic means of purchasing from our preselected vendors. Bear e-Buy also makes department purchases easier, with "one-button" reordering and many other valuable features that make ordering supplies simple and effective.

Accessing the Application

- 1) Open any web browser, and go to www.shawnee.edu.
- 2) Click on *Departments*, at the top of the page.
- 3) Click on *Purchasing*.
- 4) Click  to sign into the application.

Once you click the Bear e-Buy button, you are taken into the application, and your initial log-in will take you directly to your "profile." Click the Home/Shop tab on the far left to be taken to this home screen.

Site Navigation



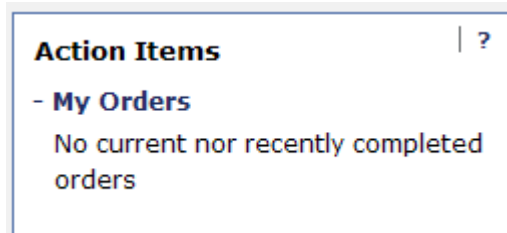
From here, you have several different options which are numbered above with the corresponding details to each number below.

- 1) When logging in, check your user information in the upper left hand side of the screen to ensure your name is correctly displayed. (You can check your contact information in the system by clicking “profile.”)
- 2) The quick search function is located at the top, right-hand side of the page. Select the appropriate drop down to search by catalog number, catalog keyword, CAS number, PO, or PR. Clicking the GO button will execute the search. Also, right above this search bar is a quick way to get into your active cart. Since the cart in the illustration is empty, it displays “*Select Draft Cart or Add Item to Cart.*”
- 3) You can shop by typing in whatever product you are searching for, and a list of all hosted products will show up, just like a search on Amazon or eBay would display your search output. The search can be refined by using the dropdown and changing it from everything to something more specific like *Lab Supplies.*

Note: If a supplier is not hosted and is a punch-out supplier, the only way to see their products is by clicking on that supplier’s logo and searching through their site.

- 4) Supplier catalogs available through Bear e-Buy are shown in the center of the home page. If you know you want a product from a specific vendor, click that vendor’s logo to see your search options.
 - a. **Hosted Supplier Section.** If you click the vendor’s logo in this section, you are prompted to type a product you are shopping for in a search bar.
 - i. A hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product details with contracted pricing information, if applicable.
 - ii. When you search within Bear e-Buy, products in all of the hosted catalogs are searched. Search results contain product information from all hosted suppliers depending on the search criteria you entered.
 - b. **Punch-out Supplier Section.** If you click the vendor’s logo in this section, you are taken directly into the supplier’s site to shop.
 - i. Once you checkout, whatever you have ordered will automatically be pulled back into Bear e-Buy for completion.
 - ii. It is also important to note that not every punch-out experience is the same. Sites vary from supplier to supplier.
 - c. The last option is a non-catalog item order, which is used when you can’t find what you are looking for in any of the catalogs available through Bear e-Buy.

Best practice! It’s always smart to ‘shop at the top,’ first, by using the search feature (#3 above). This allows you to compare prices among all hosted suppliers. If you don’t find what you want that way, then, try searching on the punch-out suppliers’ websites.




- 5) ‘Action Items,’ near the bottom, left-hand side of the home page, shows all your completed requisitions and purchase orders. Requisitions will show up here as ‘pending,’ after the requestor submits the requisition. (You may need to refresh your screen.) When the approver approves the order, it will show as a pending PO until the PO is sent to the supplier and to CARS.

Note: As an approver you will have assigned and unassigned approvals pending your review. Clicking either link will take you to all of your carts pending review.

- 6) 'Showcased Services' is coming soon. That is where you will find some of our commonly used campus forms, like the PCard Application, Request for Payment, Overnight Authorization, etc. Simply click on the needed form, fill out the required information, and submit it into workflow, just like a cart.

Important Note: An individual's approval of a requisition in workflow is equivalent to an approver's signature on a form.

- 7) *Online Help* is accessed by clicking the question marks that appear throughout the application or by clicking on the hyperlink text.

At any point you can return to the home page by clicking the *Home/Shop* tab or the  in the top left corner of the page.

VIEW AND UPDATE USER PROFILE

Select the Profile Tab in the Navigation Menu to access your user profile. You can also access your profile by clicking the profile link in the application header.

The screenshot shows the Bear e-Buy application header with the 'profile' link circled in the navigation menu. The main content area displays the 'User Identification' tab, which contains the following information:

First Name	Ricky
Last Name	Requestor
Phone Number	+1 (740) 351-2345
E-mail Address	duser@shawnee.edu
Department	Purchasing
Position	
User Name	duser

Below this information, there is a section for password recovery questions:

Please enter a question and answer that we can prompt you with should you ever forget your password.

Question	<input type="text"/>
Answer	<input type="text"/>
Confirm Answer	<input type="text"/>

The authentication method is set to 'Local'. A 'Save' button is located at the bottom of the form.

User profile screens are grouped into tabs and each tab has its own sub-set of tabs. Information relating to your settings and permissions are found here.

When you access your profile, the User Identification screen will display. The User Settings sub-sets include:

User Identification

Basic user information such as name and contact information are accessed here.

Personal Settings

Personal settings include time zone, color themes, and user interface style (displays tabs differently).

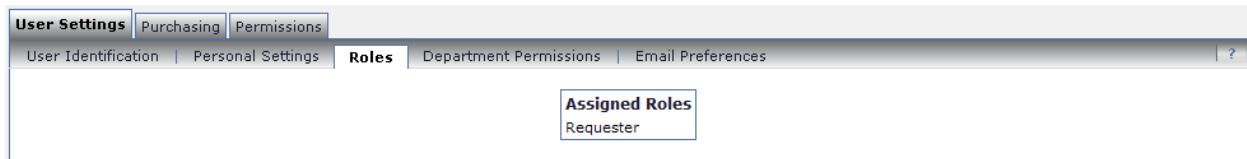
The screenshot shows the 'Personal Settings' tab selected. The settings displayed are:

Select a Language	
Country	
Time Zone	EDT/EST - Eastern Standard Time
Color Theme	
Font Size	
Help on mouse over	

'User Identification' and 'Personal Settings' have been defaulted to your profile by the system administrator. Send an email to BeB@shawnee.edu, if something needs to be changed.

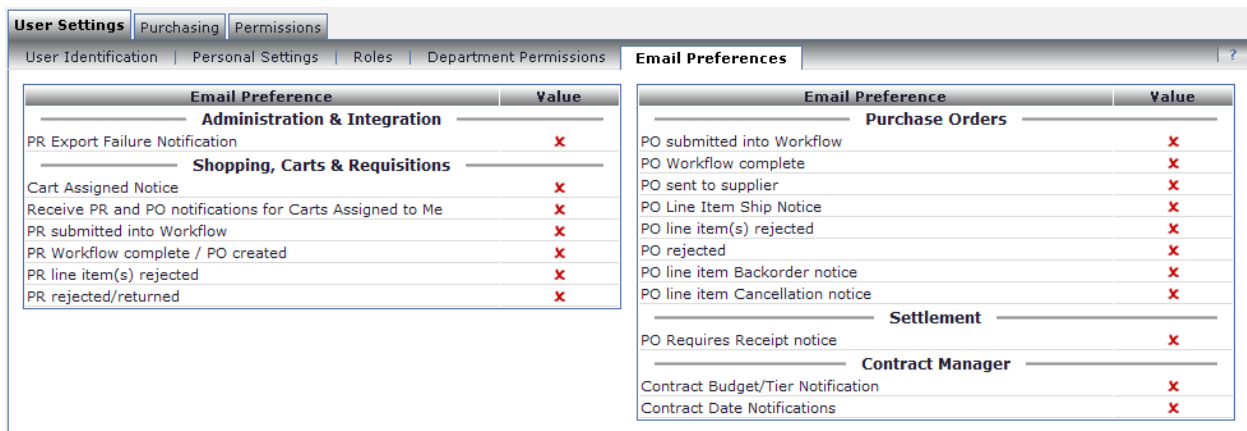
Roles / Department Permissions

Please note your roles and permissions are 'view only' in Bear e-Buy. Only a system administrator can update this information. You may contact the system administrator at ext. 3460 or by e-mail to BeB@shawnee.edu for a clarification of the roles.



Email Preferences

The E-mail Preferences screen is used to determine when and why you receive e-mail notifications. Again, please note these settings are defaulted for you. If you prefer something different, you may contact the system administrator at ext. 3460 or by e-mail to BeB@shawnee.edu.



VIEW PENDING APPROVALS

The following illustrations show how to locate requisitions that are pending approval.

The screenshot shows the Bear e-Buy Home/Shop interface. At the top, there is a navigation bar with the following tabs: home/shop, favorites, forms, carts, **2** approvals, history, item/price, and more >>. Below this is a search bar with the text 'Supplier Profile' and a 'Go' button. The main content area is divided into several sections: 'Welcome to Bear e-Buy' with a promotional message about PCard addendums; 'Quick Links' with links to 'PCard Addendum Form' and 'Walmart'; 'Showcased Suppliers' with logos for A.Daigger, Beckman Coulter, Clara I. Brown Interiors, Inc., Garrett Supply Co., Gordon Flesch Company, Inc., MDS Applied Technologies, Open Systems, Spectrum, and VWR International; and 'Punch-out Suppliers' with logos for Brown Enterprise Solutions, Guy Brown Office Max partner, lenovo, and Apple. On the left side, there is an 'Action Items' section with a red box containing the number '1' next to the 'Approvals' link. Under 'Approvals', there are two sub-sections: 'My Assigned Approvals Requisitions (1)' and 'Unassigned Approvals Requisitions (6)', with a red box containing the number '2' next to the 'Unassigned Approvals' link.

1) Under *Action Items* and *Approvals* you can see how many assigned and unassigned PRs (Purchase Requests) are in your queue. (Email preferences can be set up to notify when orders are pending your approval).

Assigned Approvals are approvals that can only be approved or rejected by you. *Unassigned Approvals* can be approved or rejected by anyone with authority to approve expenditures for that budget account.

Looking at this screen shot, there is one approval assigned and six that are unassigned. The one that's assigned is awaiting approval or rejection. The other six remain open until someone with authority to approve purchases against that budget account assigns the cart to him or herself.

- 2) Navigate to your pending approvals by clicking either *Requisition* link (assigned or unassigned) in the box under *Approvals*, or the *Approvals* tab in the light blue bar, near the top of the screen.

Assigning and Approving

Individuals who approve multiple budget accounts will have a section for each. *Assigned* requisitions always appear under the “My PR Approvals” heading.

The approvals for the user shown below are broken into three sections: *My PR Approvals* (assigned); *Athletic Director* (unassigned); and *Bus Funding/Expenses* (unassigned).

The screenshot shows the 'Approvals - Requisitions' page for Jeffrey Hamilton. The page is organized into three main sections, each with a table of requisitions. Red boxes with numbers 1, 2, and 3 highlight specific UI elements:

- 1**: Points to the 'approvals' tab in the top navigation bar.
- 2**: Points to the '+ Click to filter requisitions' button.
- 3**: Points to the 'Assign' dropdown menu in the 'Bus Funding/Expenses' section.

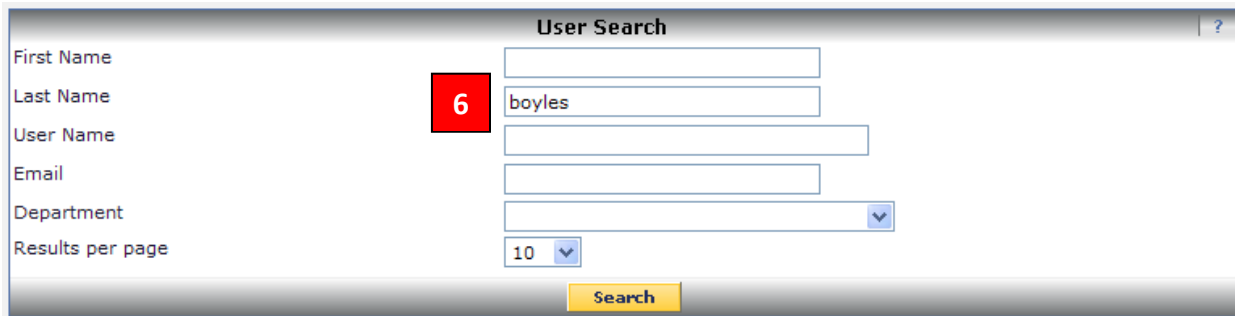
The 'My PR Approvals' section shows 0 requisitions found. The 'Athletic Director' section shows 5 requisitions found, including 19453292 and 19453192. The 'Bus Funding/Expenses' section also shows 5 requisitions found, including 19453292 and 19453192. Each requisition entry includes details such as Requisition No., State, Priority, PR Date/Time, Requisitioner, Amount, and Action.

- 1) After clicking the *Approvals* tab in the light blue bar near the top of the screen, approvers should see a screen similar to the illustration above.

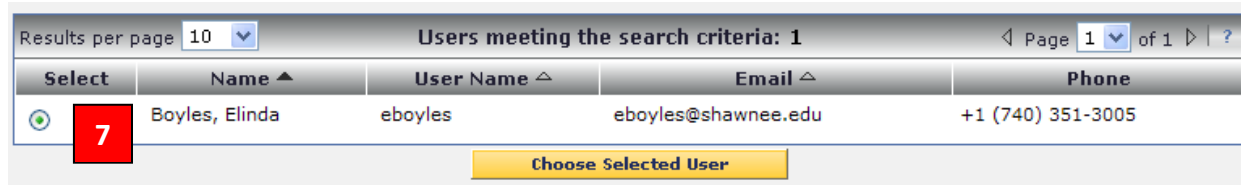
- From this screen you may filter by pending requisitions, unassigned approvals, or even a manual filter which allows you to sort by a date range.
- Clicking the word ‘assign,’ prevents others from approving or rejecting the requisition.



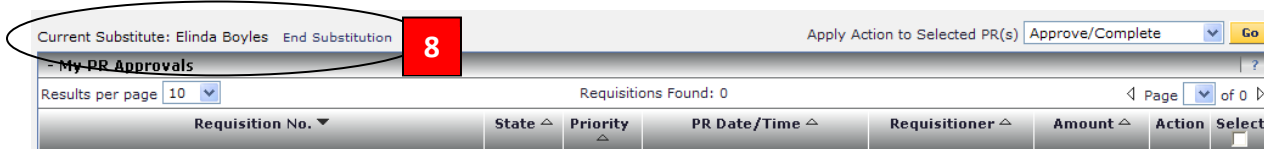
- If you wish to assign a substitute approver, while you are off campus for an extended period of time, click the *Approvals* tab in the light blue bar near the top of Bear e-Buy’s home page.
- Click *Assign Substitute*.



- Enter the last name of your substitute approver, and click *Search*.



- Select the appropriate substitute, using the radio button to the left of the user’s name, and click *Choose Selected User*.



- The substitute approver’s name should appear above *My PR Approvals*. To end the substitution, just click *End Substitution*.

Note: Only *new* requisitions will go to the substitute approver. Requisitions that are currently assigned or unassigned to you for approval must be *forwarded* to your substitute, if you don’t plan to handle them.

Assigning a Requisition to Yourself

Apply Action to Selected PR(s) Assign Go

- Athletic Director

Results per page 10 Requisitions Found: 3 Page 1 of 1

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
485587		Not Assigned	Normal	12/6/2010 10:16 AM	Jonna Cook	91.29 USD	Assign	<input checked="" type="checkbox"/>
Cart Name: Paper & 2-pocket folders Cart Description: No. of line items: 2		Suppliers: GUY BROWN						
485569		Not Assigned	Normal	12/6/2010 10:28 AM	Jonna Cook	1,102.50 USD	Assign	<input checked="" type="checkbox"/>
Cart Name: Practice uniforms & basketballs Cart Description: No. of line items: 3		Suppliers: DIXIE SPORTING GOODS		This PR is in multiple folders: Uniforms, Men's Basketball, Athletic Director				
485568		Not Assigned	Normal	12/6/2010 10:22 AM	Jonna Cook	1,950.00 USD	Assign	<input checked="" type="checkbox"/>
Cart Name: VB trip to Sioux City 12/17-21/2010 Cart Description: No. of line items: 1		Suppliers: SPRING VALLEY CHARTER		This PR has attachments This PR is in multiple folders: Bus Funding/Expenses, Athletic Director				

- 1) **Individual assignment:** You can assign requisitions to yourself, one at a time, by clicking “Assign” on the right-hand side of each line you wish to review.
- 2) **Mass assignment:** Check the select box on the appropriate lines, make the dropdown read “Assign,” and click “Go.”

Apply Action to Selected PR(s) Approve/Complete Go

- My PR Approvals

Results per page 10 Requisitions Found: 1 Page 1 of 1

Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
485587	Active	Normal	12/6/2010 10:16 AM	Jonna Cook	91.29 USD	Approve	<input type="checkbox"/>
Cart Name: Paper & 2-pocket folders Cart Description: No. of line items: 2		Suppliers: GUY BROWN					

Shopping cart descriptions

Vendor names

Apply Action to Selected PR(s) Assign Go

- Athletic Director

Results per page 10 Requisitions Found: 3 Page 1 of 1

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
485587	Jeffrey Hamilton	Assigned	Normal	12/6/2010 10:16 AM	Jonna Cook	91.29 USD	Approve	<input type="checkbox"/>
Cart Name: Paper & 2-pocket folders Cart Description: No. of line items: 2		Suppliers: GUY BROWN						
485569		Not Assigned	Normal	12/6/2010 10:28 AM	Jonna Cook	1,102.50 USD	Assign	<input type="checkbox"/>
Cart Name: Practice uniforms & basketballs Cart Description: No. of line items: 3		Suppliers: DIXIE SPORTING GOODS		This PR is in multiple folders: Uniforms, Men's Basketball, Athletic Director				
485568		Not Assigned	Normal	12/6/2010 10:22 AM	Jonna Cook	1,950.00 USD	Assign	<input type="checkbox"/>
Cart Name: VB trip to Sioux City 12/17-21/2010 Cart Description: No. of line items: 1		Suppliers: SPRING VALLEY CHARTER		This PR has attachments This PR is in multiple folders: Bus Funding/Expenses, Athletic Director				

Note the absence of the word “assign.”

- 3) It is a best practice to review each requisition, by clicking on the PR number on the left of the screen.
- 4) Assigning a PR to yourself prevents others from trying to approve it at the same time.

An approver may see a screen, like the one below, when s/he attempts to assign a requisition to him or herself. This means that this particular requisition is split between two or more accounts for which the individual has authority to approve. The screen will list the names or numbers of the accounts and will ask the approver if s/he wishes to review and approve the requisition, for all accounts listed, at one time. The options are: yes, no, or cancel.

‘Yes’ allows the entire requisition to be approved at one time. ‘No’ requires the requisition to be approved multiple, separate times, for each account listed. ‘Cancel’ closes the screen, without taking any action.

HINT: Most times budget managers will want to save time by clicking ‘yes.’ Accounting staff may or may not wish to click ‘yes,’ based on their level of responsibility for the budget accounts listed.



After assigning a requisition to yourself, click the PR number on the left-hand side of the screen, under *My PR Approvals* (PR #485587, above) to be taken into a *Summary* screen, like the one on the next page.

The screenshot shows the 'My PR Approvals' summary screen. At the top, it says 'Results per page 10' and 'Requisitions Found: 1'. Below this is a table with columns: 'Requisition No.', 'State', 'Priority', 'PR Date/Time', 'Requisitioner', 'Amount', 'Action', and 'Select'. The first row shows requisition 485587, which is 'Active' with 'Normal' priority, dated '12/6/2010 10:16 AM', by 'Jonna Cook', for an amount of '91.29 USD'. Below the table, there are details for the requisition: 'Cart Name: Paper & 2-pocket folders', 'Cart Description: Suppliers: GUY BROWN', and 'No. of line items: 2'. The requisition number '485587' is circled in red.

Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
485587	Active	Normal	12/6/2010 10:16 AM	Jonna Cook	91.29 USD	Approve	<input type="checkbox"/>

Cart Name: Paper & 2-pocket folders
 Cart Description: Suppliers: GUY BROWN
 No. of line items: 2

Illustration: Summary Screen

Available Actions: Approve/Complete Step Go

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info

General	Shipping	Billing
Status Pending Department Approvals (Jeffrey Hamilton) Submitted 12/6/2010 10:16 AM Cart Name Paper & 2-pocket folders Description no value Priority Normal Prepared by Jonna Cook	Ship To Attn: Jonna Cook DeliverTo: Athletic Center SHAWNEE STATE UNIVERSITY RECEIVING DEPARTMENT 940 SECOND ST PORTSMOUTH, OH 45662-4344 United States Delivery Options Expedite X Ship Via Best Carrier-Best Way Req Delivery no value	Bill To Accounts Payable Shawnee State University 940 Second Street Portsmouth, OH 45662-4344 United States Credit Card Info No credit card has been assigned. Billing Options Accounting Date 12/6/2010

Accounting Codes

General Ledger Account

20-0100-0000
Athletic Director

Internal Notes and Attachments	External Notes and Attachments
Internal Note no note Internal attachments	Note to all Suppliers no note Attachments for all suppliers

Supplier / Line Item Details

For selected line items: Reject Selected Items Go

GUY BROWN MBE EDGE [more info...](#)

PO Number To Be Assigned
 Account Code no value
 Quote number no value

The item(s) in this group was retrieved from the supplier's website. What does this mean?
 Need to make changes? [VIEW ITEMS](#) Item(s) was retrieved on: 12/6/2010 10:14:32 AM
 Line(s): 1, 2

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 PPR, MXBRT, 8.5X11 CRTN + more info... Manufacturer Name BOISE CASCADE CORP. Manufacturer Part Number OM98023 Supplier Part Auxiliary ID more info...	P10M98023-CTN	CT	30.19	1 CT	30.19 USD
Object Code 6110 Office Supplies Internal Note no note Internal attachments External Note no note Attachments for supplier					
2 OMX FOLDER 2PKT DK BLUE 25PK + more info... Manufacturer Name OFFICEMAX PRIVATE LABEL Manufacturer Part Number OM02883 Supplier Part Auxiliary ID more info...	L20M02883	PK	6.11	10 PK	61.10 USD
Object Code 6110 Office Supplies Internal Note no note Internal attachments External Note no note Attachments for supplier					
Supplier subtotal					91.29 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	91.29
Total	91.29 USD

On the summary screen (above), you can check all items in the cart and verify that accounting code elements are correct.

Purchases split between multiple accounts

Sometimes the requisition header will indicate that “Accounting Code values vary by line.” In this case, an approver can view the different accounting codes, by line, by clicking on the ‘Accounting Codes’ tab.

Available Actions: Approve/Complete Step Go

Requisition | PR Approvals | PO Preview | **Accounting Codes** | Attachments (1) | History

Summary | Shipping | Billing | **Accounting Codes** | Supplier Info

Hide value descriptions

Accounting Codes

These values apply to all lines unless specified by line item

Accounting Codes values vary by line

Supplier / Line Item Details

For selected line items Reject Selected Items Go

CLARA I. BROWN INTERIORS, INC. - CIBI MBE OH iuc EDGE more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 6G HUMANSCALE;6G MECHANISM/400-DIA BIG PLATFORM 20" AND 7" GEL W/SYNT. LEATHER more info...	6G 400	1/EA	181.44	1 EA	181.44 USD
Accounting Codes (same as header)					
General Ledger Account					
10-1070-1000 Teacher Education					
2 HUMANSCALE CPU HOLDER more info...	CPU555	1/EA	66.42	5 EA	332.10 USD
Accounting Codes values have been overridden for this line					
General Ledger Account					
12-1702-0070 Teacher Education					
3 HUMANSCALE SURCHARGE more info...	--	1/EA	12.00	1 EA	12.00 USD
Accounting Codes (same as header)					
General Ledger Account					
10-1070-1000 Teacher Education					
Supplier subtotal					525.54 USD
Subtotal					525.54
Total					525.54 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Note that each line is charged to a single account, but not all lines are the same.

When individual lines are split between two or more budget accounts, the approver should scroll down to the line item and click on 'view / edit,' to see how much has been charged to their budget account. Each approver involved in a split purchase is approving only their portion of the purchase. The requisition will not proceed past this point till all approvals have been made.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Lenovo ThinkVision L2250P (22in wide) LCD Monitor more info...	2572HB6	EA	199.99	1 EA	199.99 USD
Accounting Codes values have been overridden for this line view/edit					
Manufacturer LENOVO Name	Object Code	6810 Non-Capitalized Equipment (includes grant equipment under \$1,500)	Internal Note	no note Internal attachments	
Manufacturer 2572HB6 Part Number			External Note	no note Attachments for supplier	
Supplier Part <shopCartId>3ACE5FDA9BD04CDE815835DEFEF63B52</shopCartId> Auxiliary ID <contract/> <max_c... more...					
more info...					

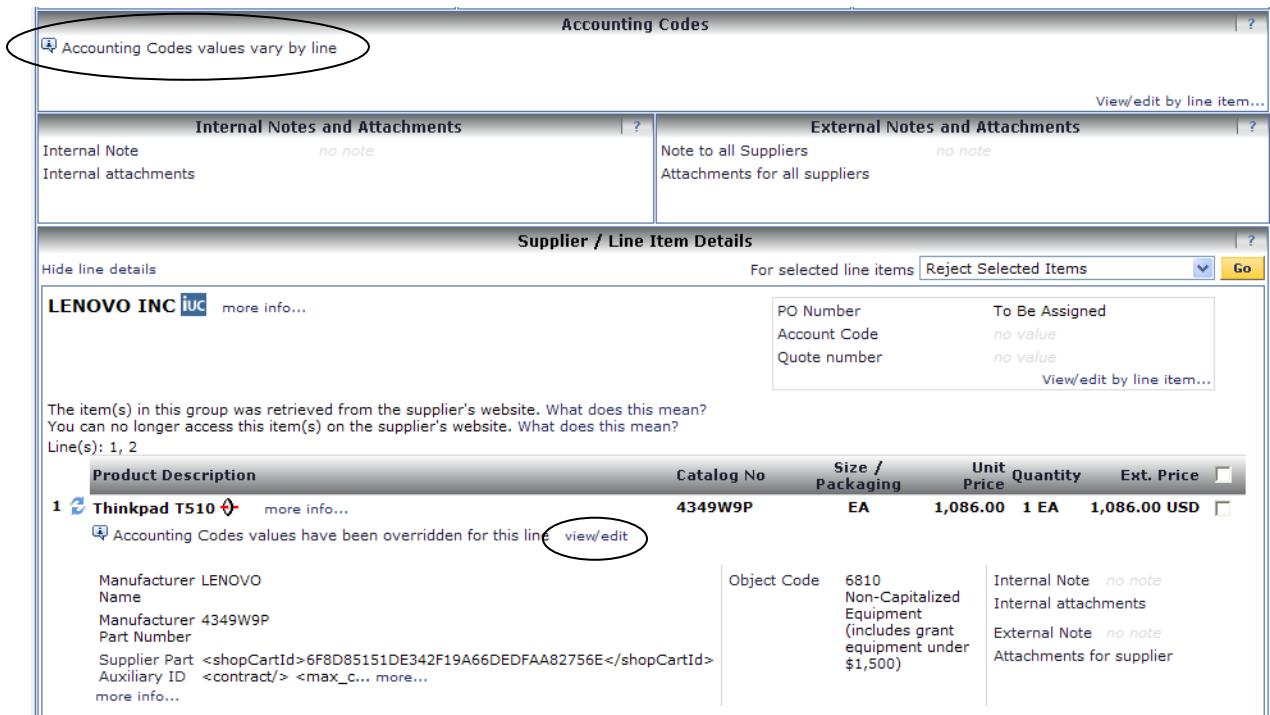
Clicking on 'view/edit' takes the approver to a screen that shows which accounts were charged and the amount assigned to each budget account.

Accounting Codes

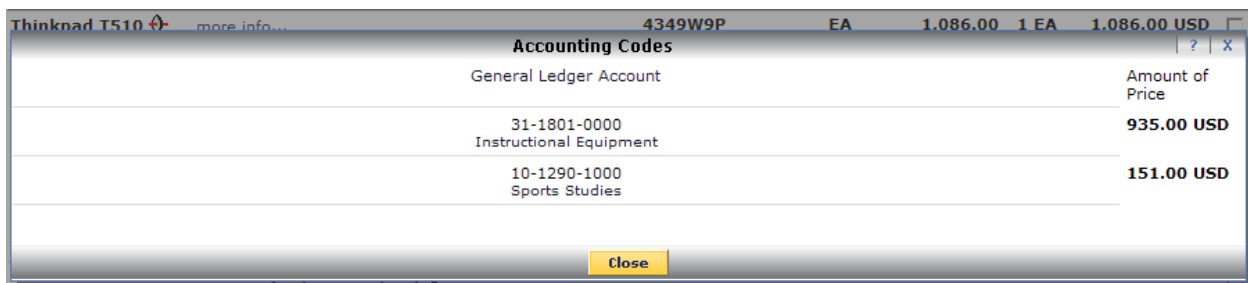
General Ledger Account	Amount of Price
12-1702-0040 Mathematics	100.00 USD
12-1702-0060 Social Sciences	99.99 USD

Close

Here's another example of a similar scenario. In this example, a computer order was split between instructional equipment and a departmental budget account. Note the placement of 'Accounting Codes values vary by line' and 'view/edit.'



Clicking on "view/edit" (shown above), takes the approver to the following screen, which shows that part of this computer purchase was charged to instructional equipment and the remainder was charged to the department's budget account.



SUMMARY: A Standard Approval

- 1) Navigate to the *Approvals* tab at the top of the screen (Bear e-Buy home page).
- 2) Assign the appropriate cart(s) to yourself.
- 3) Click the PR # of the requisition you wish to review.
- 4) Review the transaction details, including any attachments and comments.
- 5) Change the drop down in the upper right corner to *Approve/Complete Step*, and click *Go*.

Rejecting a Line or a Whole Document

If you reject a requisition, you must reject all of the line items for that document. Bear e-Buy also allows you to delete selected line items from a requisition or order.

Follow these steps to reject a PR by line item or the entire document:

- 1) Open the PR as discussed above. (You must open a document before you can reject it.)
- 2) Select one or more line items to reject by clicking the checkbox to the right of the price. You can also select the checkbox in the column header row for each supplier to select all lines.
- 3) Choose *Reject Selected Items* from the drop-down menu and click *Go* to reject the line items.
- 4) Enter the rejection reason in the comment pop-up box.

Note: You must enter a comment when rejecting.

- 5) Click the *Reject Line Item* button to save the comment and reject the line item(s). Note that the line item will still show, but a symbol to the left of the item name will indicate the line item is pending rejection.
- 6) When you've finished reviewing the requisition, select *Approve/Complete Step* from the *Available Actions* drop-down box.
- 7) Selecting *Go* will complete your review of the PR and will move it to the next step in workflow, if appropriate.

Returning/Recycling a Requisition

If you have concluded that the order is valid, but noticed that the accounting elements or some other information is incorrect, then you will want to send the PR back to the requestor to make the correction.

To return the PR to the requestor:

- 1) Open the PR as discussed above. (You must open a document before you can recycle/return it to the requestor.)
- 2) Select *Return to Requisitioner* from the *Available Actions* drop-down box, and click *Go*.
- 3) Enter a note for the user to describe the reason you are returning the PR.
- 4) Click the *Return to Requisitioner* button.

Forwarding

To forward a requisition to another approver:

- 1) Navigate to the *Approvals* tab at the top of the Bear e-Buy home page.
- 2) OPTION 1: If you want to forward a PR for approval that has not been Viewed/Opened
 - a. Click the check boxes for the appropriate requisition(s).
 - b. Select the *Forward* option from the drop down box and click *Go*. Move on to Step 3.

OPTION 2: If you want to forward a PR for approval after it has been Viewed/Opened

- a. Select the *Forward To* option from the *Available Actions* drop-down box and click *Go*. Move on to step 3.
- 3) Enter specific user criteria to find the recipient of the forwarded requisition. (See illustrations on page 11.)
- 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 to describe the reason you are forwarding the approval.
- 8) Click the *Forward* button.

Follow these steps, if a requisition/PO needs to have a document or note attached after it has been submitted into workflow.

- 1) Find and open the requisition/PO to add comments or attachments.
- 2) Select *Add Comment* from the drop-down in the upper right and click *Go* to open a separate window (shown below).

You can select who will see this comment once it is added by sending them an email notification. Pat Carson's name is displayed because she was an approver in this example. Had someone else been required to approve this order, their name would be displayed as well. If you need anyone outside of the workflow to see the email, simply click the 'add email recipient' link to add any users necessary.

Note: Be sure to check the box next to the names you want to receive the email notification.

- 3) After the appropriate names are selected, browse to attach your file, and click *Add Comment*.

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

Pat Carson (Prepared by) <pcarson@shawnee.edu>
[add email recipient...](#)

1000 characters remaining expand | clear

Attach file to this document (optional):

Attachment Type: File

File Name:

File:

Note: Comments added after a PO or requisition is entered into the workflow can only be seen by SSU.

You can view attachments and notes tied to a PO or requisition, by clicking on the *Comments* sub tab, when you are in that PO or requisition.

HISTORY

The history tab can be used to check on the status of requisitions and purchase orders. After you click history, several search options are available to you.

Follow these steps to search for orders using the PR or PO History search:

- 1) Click the *History* tab.
- 2) Select a method to search for the order you are looking for by clicking the appropriate tab at the top of the search screen. (Refer to Requestor Training Guide pg. 25-27).
- 3) Click the *Filter* checkbox to activate the filter options at the bottom of the search page.
- 4) Click the radio button next to *Company Orders*.
- 5) Enter a specific date range, if appropriate.
- 6) Enter the appropriate budget account number or use the link provided to select the account from your profile.
- 7) Select the specific user(s) to view, if appropriate.
- 8) Filter your search further, if desired, by selecting the item from the left hand list and click the arrowhead that points to the right to move it into the filtered lists on the right.
- 9) Click the *Search* button once you have the desired filters set.

MISCELLANEOUS SCREENSHOTS

Illustration 1: Approvers may see two or more vendors in one cart:

Shopping Cart for Judy Morrow

[Continue Shopping](#)

31 Item(s) for a total of **1,127.31 USD**

Name this cart:

Have you made changes? [Help](#) | [Add Non-Catalog Item](#) | [Empty Cart](#) | Perform an action on (0 items selected)...

A. Daigger & Co.

more info...

	Product Description	Unit Price	Quantity	Total
Item added on Nov 30, 2010 <input type="button" value="Add to Favorites"/> <input type="button" value="Remove"/> <input type="button" value="More Actions"/>	<u>ULTRASONIC CLEAN 2.8L 230V 1EA</u> Part Number JX20732L EA Manufacturer Info 9493214 - (DUGUSSA-NEY DENTAL INC.L) Contract UN08-040 more info... Object Code <input type="text" value="6810"/>	608.31 USD EA change price...	<input type="text" value="1"/> <input type="button" value="Update"/>	608.31 USD

GUY BROWN

more info...

The item(s) in this group was retrieved from the supplier's website. What does this mean?

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 9/1/2010 9:24:31 AM
Line(s): 2

	Product Description	Unit Price	Quantity	Total
Item added on Sep 1, 2010 <input type="button" value="Add to Favorites"/> <input type="button" value="Remove"/> <input type="button" value="More Actions"/>	<u>PPR, MXBRT, 8.5X11 CRTN</u> Part Number P10M98023-CTN Manufacturer Info OM98023 - (BOISE CASCADE CORP. -) Object Code <input type="text" value="6110"/>	29.92 USD CT	<input type="text" value="10"/> <input type="button" value="Update"/>	299.20 USD

VWR International

more info...

	Product Description	Unit Price	Quantity	Total
Item added on Nov 30, 2010 <input type="button" value="Add to Favorites"/> <input type="button" value="Remove"/> <input type="button" value="More Actions"/>	<u>DENTAL WAX PINK 5LB/BX [VWR MarketSource]</u> Part Number 100500-680 (BX) Manufacturer Info 72670 - (ELECTRON MICROSCOPY SCIENC NM) Contract UN08-040 more info... Object Code <input type="text" value="6120"/>	10.99 USD BX change price...	<input type="text" value="10"/> <input type="button" value="Update"/>	109.90 USD
Item added on Nov 30, 2010 <input type="button" value="Add to Favorites"/> <input type="button" value="Remove"/> <input type="button" value="More Actions"/>	<u>DENTAL WAX RED BX=1LB [VWR MarketSource]</u> Part Number 100502-630 (BX) Manufacturer Info 72674 - (ELECTRON MICROSCOPY SCIENC NM) Contract UN08-040 more info... Object Code <input type="text" value="6120"/>	10.99 USD 1lb, BX change price...	<input type="text" value="10"/> <input type="button" value="Update"/>	109.90 USD
Supplier subtotal				219.80 USD

Illustration 2: A PR that has attachments and notes

The screenshot shows the Bear e-Buy interface for a requisition. At the top, the user is logged in as Pat Carson. The page title is "Approvals - Requisitions". The navigation bar includes "home/shop", "favorites", "forms", "carts", "approvals", "history", "item/price", and "more >>". The main content area shows a requisition for "T HAMILTON AIRFARE" with a value of 427.80 USD. The requisition is in an "Active" state with a "Normal" priority. The requisitioner is Sharon Messer. The requisition date is 12/1/2010 1:18 PM. The supplier is TRAVEL WORLD. The requisition has 1 line item. The requisition is circled in red, and a callout box indicates that it has attachments and notes.

Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
19457524	Active	Normal	12/1/2010 1:18 PM	Sharon Messer	427.80 USD	Approve	<input type="checkbox"/>

Cart Name: T HAMILTON AIRFARE
 Cart Description:
 No. of line items: 1

Suppliers: TRAVEL WORLD

This PR has attachments
 This PR has notes

Illustration 3: A PR that has attachments, notes, and is charged to multiple budget accounts:

The screenshot shows the Bear e-Buy interface for a requisition. At the top, the user is logged in as Pat Carson. The page title is "Approvals - Requisitions". The navigation bar includes "home/shop", "favorites", "forms", "carts", "approvals", "history", "item/price", and "more >>". The main content area shows a requisition for "CUSTOM TABLE THROWS" with a value of 405.00 USD. The requisition is in a "Not Assigned" state with a "Normal" priority. The requisitioner is Kimberly Robbins. The requisition date is 11/30/2010 4:18 PM. The supplier is AG PRINTPROMO SOLUTIONS. The requisition has 2 line items. The requisition is circled in red, and a callout box indicates that it has attachments, notes, and is charged to multiple budget accounts.

Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
19439748	Not Assigned	Normal	11/30/2010 4:18 PM	Kimberly Robbins	405.00 USD	Assign	<input type="checkbox"/>

Cart Name: CUSTOM TABLE THROWS
 Cart Description:
 No. of line items: 2

Suppliers: AG PRINTPROMO SOLUTIONS

This PR has attachments
 This PR has notes
 This PR is in multiple folders: General Ledger Account: 30-2403-0000 (Upward Bound Project): (0.00 - 2,500.00) USD
 General Ledger Account: 30-2404-0000 (Math/Science Upward Bound): (0.00 - 2,500.00) USD