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 -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 [Bear e-Buy](http://www.shawnee.edu) 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.
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.

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).

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

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).

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.
2) 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.

3) Clicking the word ‘assign,’ prevents others from approving or rejecting the requisition.

4) 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.

5) Click Assign Substitute.

6) Enter the last name of your substitute approver, and click Search.

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

8) 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

<table>
<thead>
<tr>
<th>Requisition No.</th>
<th>Cart Name</th>
<th>Cart Description</th>
<th>No. of line items</th>
<th>Approver</th>
<th>State</th>
<th>Priority</th>
<th>PR Date/Time</th>
<th>Requiscisoner</th>
<th>Amount</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>485557</td>
<td>Paper &amp; 2-pocket folders</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>485566</td>
<td>Practice uniforms &amp; basketballs</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>485568</td>
<td>VB trip to Sioux City 12/17-21/2010</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.”

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.
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.
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.

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

**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.
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.
Illustration 1: Approvers may see two or more vendors in one cart:
Illustration 2: A PR that has attachments and notes

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