



Approvals/Rejections

E-mail notifications of a needed approval will be sent to an approver's GroupWise e-mail. An approver's profile e-mail preferences should have "PR Pending Workflow Approval" activated to receive this notification. Receiving this notification means that a requisition requires the action of approval, rejection or modification. You may approve or reject individual line items or the entire order.

Example of E-mail Notification to Approver of a Pending Order

Re: **YOUR APPROVAL IS PENDING** REQUISITION # 343607
Folder: Organization: C31006 (Purchasing): (1.00- *) USD

Dear John Cooker

The requisition listed above has been submitted for your approval and is located in the folder listed. If the folder is a shared folder, the requisition must first be assigned to your personal folder before approving. The requisition can be accessed for review in "My Approvals" or by selecting the URL below.

<https://usertest.sciquest.com/apps/Router/ReqApprovalFolders?AuthUser=583943&tmstmp=1257168372157>

There are two additional ways to check if you have pending approvals.

- Check "Action Items" on SupplierConnect's main page
- Open up SupplierConnect and click on "Approvals" tab on the main toolbar

Welcome to HACC's SUPPLIER CONNECT E-Procurement System

- Training Aids
- Requisitioner Handbook
- Approvals and Workflow Setup Handbook
- Questions: email to SupplierConnect@hacc.edu

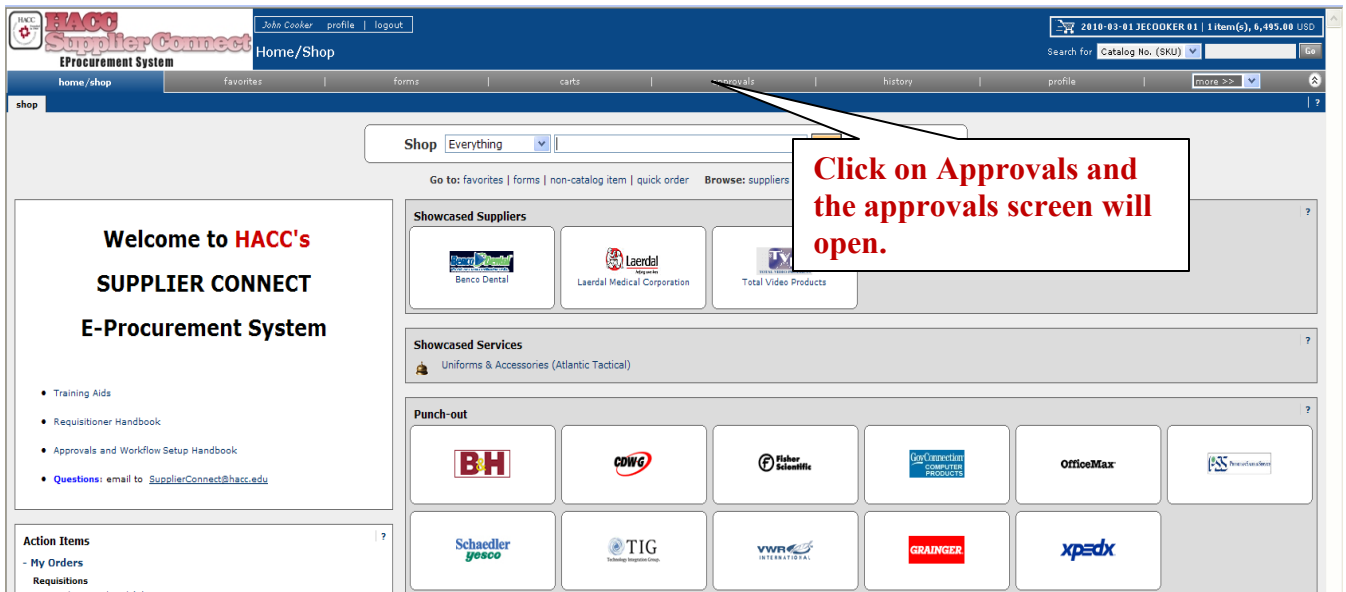
Action Items

- My Orders
- Requisitions
Recently Completed (4)
- Purchase Orders
Recently Completed (4)

If there were approvals pending, a heading 'Approvals' will indicate the number of carts assigned to you needing approval.

My Resources
email: SupplierConnect@hacc.edu

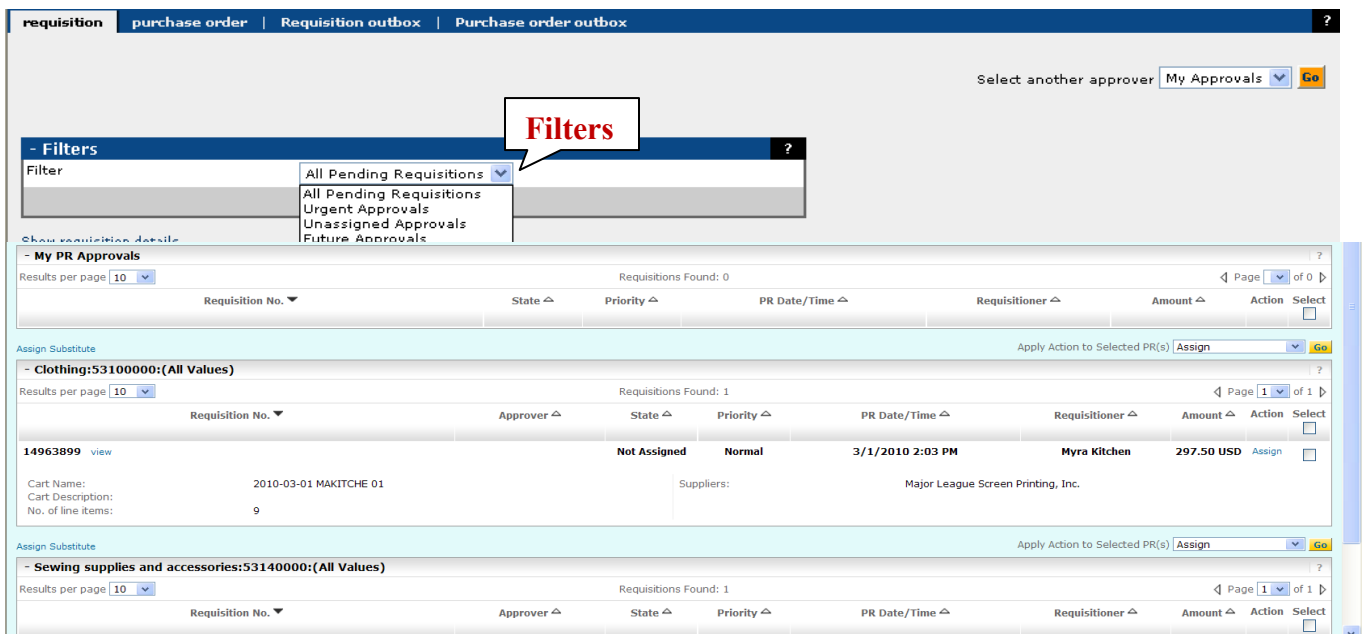
Approvals/Rejection cont'd.



The “Approval” screen will open (illustrated below) and the tab “My PR Approvals” screen appears. A list of requisitions pending your review for approval, modification or rejection actions appear.

Depending on the number of requisitions you may have to approve, SupplierConnect provides a “Filter” to choose to look at:

- All pending requisitions
- Urgent approvals
- Unassigned approvals
- Future approvals



Approvals/Rejection cont'd.

Assigning Requisitions: Moving Documents to My 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) into the “**My PR 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 PR Approvals” folder, the approver is indicating their intent to review (approve or reject) the order.

In the illustration below, the screen has several sections. A **red** line has been drawn to illustrate that there is an area called “**My PR Approvals**” and the lower sections which are made up of a requisition or items needing approval. Specific items needing approved are because the approval required is from the “buyer” and not the financial approver.

The screenshot shows the HACC Supplier Connect EProcurement System interface. The top navigation bar includes the user name 'Suzanne Davis' and options for 'profile' and 'logout'. The main title is 'Approvals - Requisitions'. Below the navigation bar, there are tabs for 'requisition', 'purchase order', 'requisition outbox', and 'purchase order outbox'. The 'requisition' tab is selected. The interface is divided into two main sections. The top section, labeled 'My PR Approvals', is currently empty. The bottom section, labeled 'Requisitions or items needing approval.', contains a table of requisitions. One requisition is highlighted with a red box and labeled 'Not Assigned'. A red line is drawn across the interface to separate the two sections. A red box labeled 'Step 1: Assign' points to the 'Assign' button in the table.

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
14963899	Not Assigned		Normal	3/1/2010 2:03 PM	Myra Kitchen	297.50 USD	Assign	<input type="checkbox"/>

The upper section, “**My PR Approval**” will be empty when you first open the “Approvals” tab. The lower section is populated but the requisition or item may be “**not assigned**” or “**assigned**”. “**Not assigned**” requires the assignment of the requisition or item to yourself. Prior to “**assigning**” the requisition to yourself, you may view the requisition by selecting “**view**” next to the requisition number. This will open the requisition. (The action of “**view**” may be performed once the requisition or item has been moved to the “**My PR Approvals**” section as well.)

Approval Assignment cont'd.

If a requisition is assigned and a name appears in the column “**approver**”, then that approver is the only person required to approve. However if the requisition is “**not assigned**”, this means two or more persons are capable of approving. Provided all approver’s profile e-mail preferences have activated “**PR Pending Workflow Approval**”, they will all receive an e-mail notification informing them there is a requisition pending approval. They all will see the “**pending approval**” action on the main page “**Action**” area.

Apply Action to Selected PR(s) | Assign | Go

Organization: C31006 (Purchasing): (1.00 - *) USD								
Results per page 100		Requisitions Found: 8						Page 1 of 1
Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action	
343607		Not Assigned	Normal	11/2/2009 8:25 AM	John Cooker	25.98 USD	Assign	
342554	John Cooker	Assigned	Normal	10/27/2009 10:54 AM	John Cooker	142.69 USD	Assign	
341467		Not Assigned	Normal	10/27/2009 10:39 AM	Michael McEnany	149.94 USD	Assign	
341380		Not Assigned	Normal	10/22/2009 2:16 PM	John Cooker	12.96 USD	Assign	
341220		Not Assigned	Normal	10/21/2009 4:03 PM	Michael McEnany	96.05 USD	Assign	
340600		Not Assigned	Urgent	10/19/2009 11:51 AM	John Cooker	185.34 USD	Assign	
340564		Not Assigned	Urgent	10/19/2009 11:11 AM	John Cooker	20.35 USD	Assign	
340529		Not Assigned	Normal	10/18/2009 10:48 AM	John Cooker	10.44 USD	Assign	

All possible approvers also see they need to “**assign**” a requisition to themselves to be able to approve, reject or modify. The approver may view the PR first by selecting “**view**” or they may “**assign**” it to themselves immediately. “**View**” will open the entire requisition for the approver to look at before assigning to themselves. It could be that another approver may know more about the order.

Once “**assigned**”, the order moves to “**My PR Approvals**” section where you can choose necessary actions. To assign the requisition to yourself, you can merely click on the word “**Assign**” under the “**Action**” column or use the drop down menu called “**Apply Action To Selected PR(s)**” and click GO.

Select Draft Cart or Add Item to Cart

Search for Catalog No. SKU | Go

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

Apply Action to Selected PR(s) | Assign | Go

Approvals - Requisitions							
+ Click to filter requisitions		Requisitions Found: 1					
Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action	Select
14968354	Active	Normal	3/1/2010 2:46 PM	Myra Kitchen	247.00 USD	Approve	<input type="checkbox"/>

View

Sewing supplies and accessories:53140000:(All Values)							
Results per page 10		Requisitions Found: 1					
Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action
14968354	Suzanne Davis	Assigned	Normal	3/1/2010 2:46 PM	Myra Kitchen	247.00 USD	Assign

My PR Approvals Folder; Reviewing the Requisition cont'd.

Before approving, click the word “**View**” next to the requisition number and the entire order will open. (See the illustration above).

The screenshot displays a procurement system interface with several sections and callouts:

- General:** Cart Name: 2010-03-01 JECOOKER 01. Callout: **General**
- Shipping:** Ship To: ATTN: John Cooker, Bldg/Room W120B, HACC - Service Center, One HACC Drive, Harrisburg, PA 17110. Callout: **Shipping**
- Billing:** Bill To: Accounts Payable, One HACC Drive, Harrisburg, PA 17110-2999, United States. Callout: **Billing**
- Accounting Codes:** Chart: C, Fund: U1C001 (Central Unrestricted Credit), Organization: C31006 (Purchasing), Account: 730007 (Office Supplies), Program: 163 (General Admin & Logistical Services). Callout: **Accounting Codes**
- Internal Notes and Attachments:** Callout: **Internal: Notes/Attachments**
- External Notes and Attachments:** Callout: **External: Notes/Attachments**
- Supplier / Line Item Details:** Supplier: B&H Photo-Video.com Corp. Item: 1 Matrox Axio LE Turnkey Editing System. Callout: **Supplier - Items Requested, Quantity, Price, TOTAL**

Chart	Fund	Organization	Account	Program
C	U1C001	C31006	730007	163
C	Central Unrestricted Credit	Purchasing	Office Supplies	General Admin & Logistical Services

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Matrox Axio LE Turnkey Editing System	MAALETA	EA	6,495.00	1 EA	6,495.00 USD

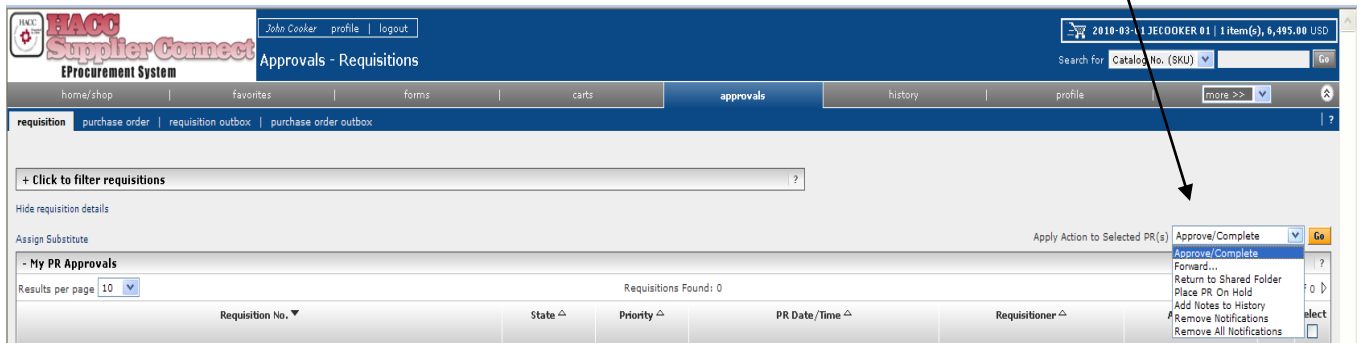
Review the following:

- General, Shipping, Billing
- Accounting Information (Have the appropriate Fund, Org, Account, Program been used?)
- Any internal or external notes or attachments

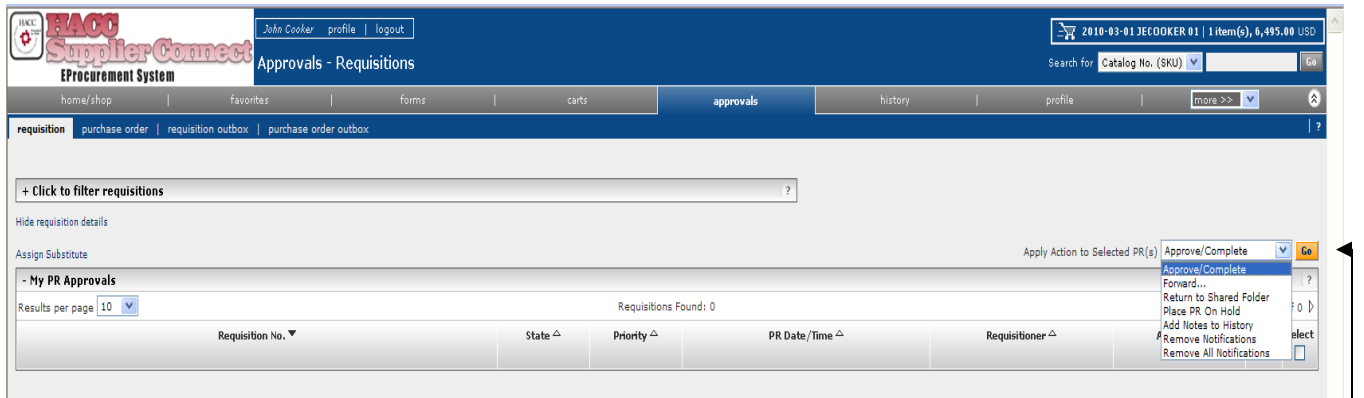
Apply Action To Selected PR(s)

After reviewing the requisition, there are several actions that are available to the user. They are listed under the drop down menu called “Apply Action to Selected (PR)”.

- Approve/Complete
- Return to Shared Folder
- Forward
- Place PR on Hold
- Add Notes to History



If APPROVING –



1. Select “Approve/Complete” from the drop down list
2. Click GO

The requisition is now approved and continues in the workflow to obtain a Banner Purchase Order # and then sent to the supplier automatically.

Note: If the requisition contains any single item greater than \$750.00 the requisition, once approved by the org approver, goes to a “buyer” for their review and approval.

IF MODIFYING-

The approver may modify any data including the accounting, shipping information, quantity. To make changes, click on the “view” option next to the purchase requisition. This will open the entire requisition. Making changes are through the use of “edit”. Clicking “edit” in any field will allow you to make changes. After any action, click SAVE.

The screenshot displays the 'Summary - Draft Requisition' page in the HACC Supplier Connect Procurement System. A red box labeled 'EDIT' is placed over the 'Shipping' and 'Billing' sections. Arrows point from this box to the 'edit' links in the following sections:

- Ship To:** Address and contact information for the supplier.
- Delivery Options:** Shipping method and carrier selection.
- Billing To:** Billing address and contact information.
- Billing Options:** Billing cycle and terms.

The 'Accounting Codes' section is also visible, showing details for Chart, Fund, Organization, Account, Program, and Activity. The 'Internal Notes and Attachments' section contains a note: 'Note to all Suppliers Attachments for all suppliers'.

IF REJECTING:

1. The Approver may reject the entire order or individual lines. To reject specific lines, in the review PR APPROVALS, check the box next to the line item(s) to be rejected.
2. Click GO.
3. A box will open called REJECT LINE REASON.
-Type in a reason for rejecting the item(s)
4. Click GO.
5. Select APPROVE/COMPLETE in the AVAILABLE ACTIONS drop-down box
6. Click GO