



Approver Manual

Published by: Finance Infrastructure

January 2017



WWW.LIBERTY.EDU
TRAINING CHAMPIONS FOR CHRIST SINCE 1971

Table of Contents

I.	Approval Email and Notifications	3
II.	Approving Carts within a Workflow	4
A.	Email Notification	4
B.	Approving Carts Within buyLU	5
1.	Action Items	5
2.	Documents	6
3.	Sort by.....	6
4.	Filter My Approvals	7
III.	Moving a Requisition to My Approvals	7
IV.	Reviewing a Requisition	9
V.	Approving a Requisition	10
A.	Quick Approvals	10
B.	Standard Approvals	10
VI.	Rejecting a Requisition.....	11
A.	Reject Selected Items	12
VII.	Adding a Comment to a Requisition	14
VIII.	Returning a Requisition to the Requestor	18
IX.	Add Notes to History.....	20
X.	Returning a Requisition back to the Shared Queue	21
XI.	My Recent Approvals	21
XII.	Reports	22

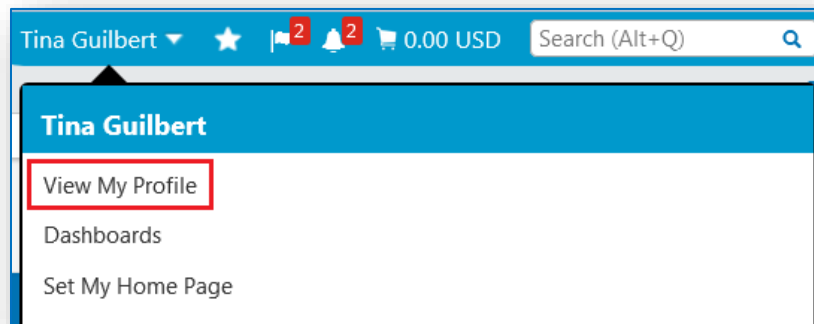
Approving Orders

Once a Requestor submits a cart into workflow, an Approver will need to approve or reject items in that cart or the entire requisition.

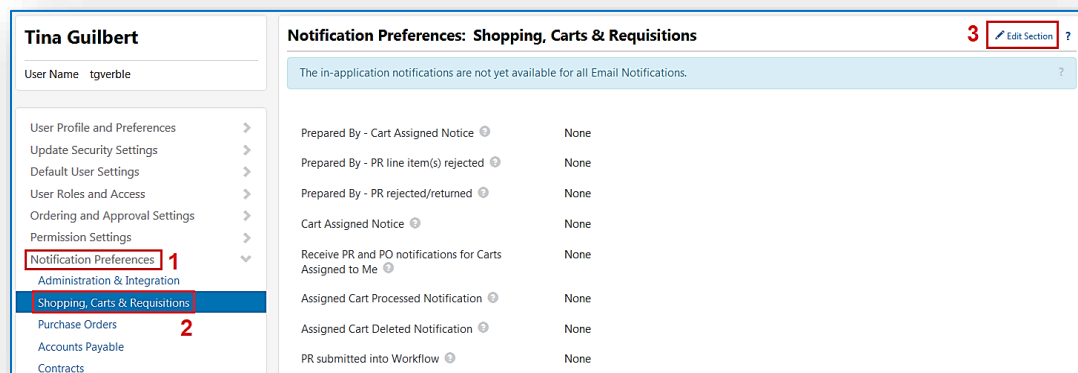
If part of a requisition is rejected the remaining items continue in the process. Comments and attachments can be sent back and forth between Approvers and Requestors during the approval process.

I. Approval Email and Notifications

By default buyLU is set for the user to not receive notifications of documents pending approval. Access this feature from [View My Profile](#).



1. Select Notification Preferences
2. Select Shopping, Carts & Requisitions
3. Select Edit Section



Choose PR pending Workflow approval, Override, then select either Email, Notifications (within buyLU), or both Email & Notification.

PR pending Workflow approval ? ☐ Default ☒ Override

PR Workflow Notification available ? ☒ Default ☐ Override

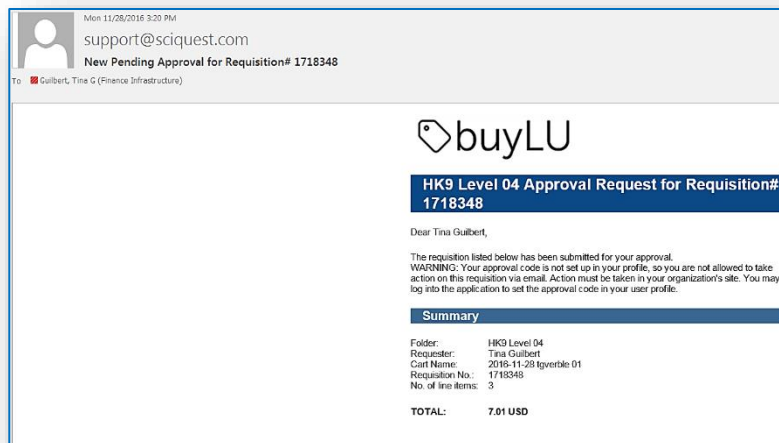
PR Workflow complete / PO created ? ☒ Default ☐ Override

None
None
Email
Notification
Email & Notification

II. Approving Carts within a Workflow

A. Email Notification

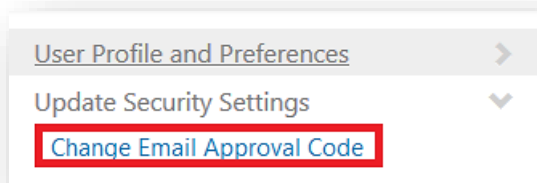
Once the email notification setting is updated the Approver will receive an email notification alerting them there is a requisition needing their approval. The Approver can access the approvals screen within buyLU by clicking the [View Requisition Approvals](#) link provided within the body of the email.



[View Requisition Approvals](#)

Approvers also have the option to approve a requisition **within the email notification**. In order to do so they will need a 4-digit approval code. This is set up within the Approver's profile.

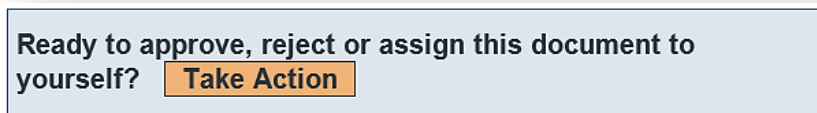
Within the profile go to “[Update Security Settings](#)” – “[Change Email Approval Code](#).”



Enter a pin number of his or her own choosing and [Save Changes](#).

A screenshot of a modal dialog box titled 'Change Email Approval Code'. Inside the dialog, there is a label 'Email Approval Code' followed by a text input field. At the bottom right of the dialog, there are two buttons: 'Save Changes' (in blue) and 'Close' (in grey).

When the email notification arrives it will contain this box:



You will be able to approve, reject, or assign the document from within the email notification by clicking “[Take Action](#)” and using your pin number.

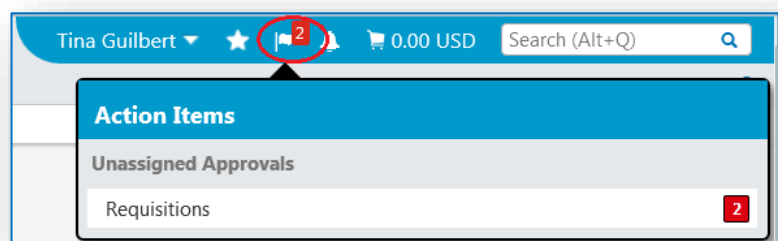


Note: *This option is not available on the test site.*

B. [Approving Carts Within buyLU](#)

1. Action Items

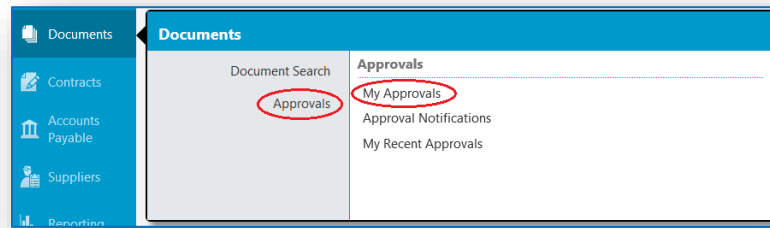
Within the buyLU site, the Approver can view requisitions pending approval from the home/shop tab notice the [Action Items](#) link. Click the [Action Items](#) [Notifications](#)



link. The Approver can view how many approvals are currently waiting in the queue for approval.

2. Documents

The approver can also find the requisitions needing approval by clicking the **Documents** icon on the main navigation ribbon, then **Approvals** and **My Approvals**.



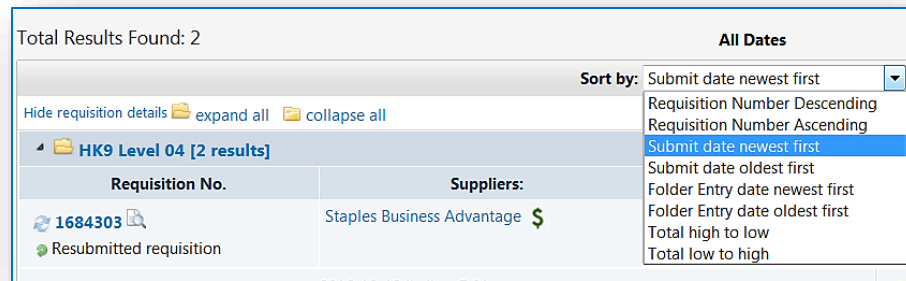
The section at the top of the screen is the **My Approvals** queue. When a document is in this queue, the Approver owns it.

A screenshot of the 'My Approvals' queue in a software application. The queue is titled 'My PR Approvals [1 result]'. It shows a table of requisitions. The first requisition is '1684303' from 'Staples Business Advantage' with an assigned approver 'Tina Guilbert'. The second requisition is 'HK9 Level 04 [2 results]' from 'Staples Business Advantage' with an assigned approver 'Tina Guilbert'. A red arrow points to the 'HK9 Level 04' requisition with the text 'SHARED QUEUE'. The table has columns for 'Requisition No.', 'Suppliers', 'Assigned Approver', 'PR Date/Time', 'Requisitioner', 'Amount', and 'Action'. The 'Action' column has an 'Approve' button for the first requisition and an 'Assign' button for the second requisition. The table also shows 'Resubmitted requisition' and 'No. of line items' for each requisition. The 'HK9 Level 04' requisition has a 'Folders' section showing '0 Days in folder [My PR Approvals]' and '0 Days in folder [HK9 Level 04]'. The table is sorted by 'Submit date newest first' and shows 'Results per folder: 20'.

Shared queues can be accessed by one or more Approvers and are displayed **under** the My PR Approvals queue. The actual queue that displays for an Approver is dependent on what they are responsible for approving.

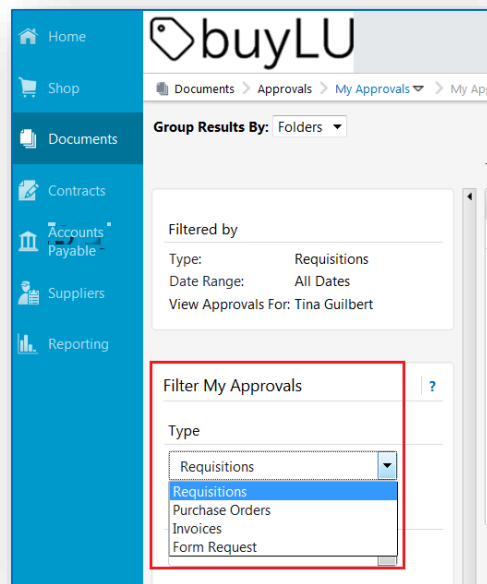
3. Sort by

The Approver can use the **Sort by** option at the top of the screen to sort approvals.



4. Filter My Approvals

The Approver can also filter approvals by type using the [Filter My Approvals](#) option.




III. Moving a Requisition to My Approvals



Some requisitions requiring review automatically go to your approvals queue. If an approval step is *shared* by more than one person, the document is assigned to the approval queue and an Approver must move the requisition into their queue to review. As items are assigned from the shared queue to the My Approvals, the [Assign](#) button changes to [Approve](#). When the Approver approves/rejects requisitions from their My Approvals queue, they leave both queues.








Look for a requisition in the shared queue. Notice in the **Action** column the requisition is currently “Not Assigned”. To the right of that requisition, click the **Assign** button. This moves the requisition to My Approvals. The document is now in **My PR Approvals** queue.

Total Results Found: 2

All Dates Assign 


Sort by: Submit date newest first

Hide requisition details  expand all  collapse all Results per folder: 20

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
 1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	 Approve
Resubmitted requisition						
Requisition Name		2016-10-12 jlwilson7 01		Folders 0 Days in folder [My PR Approvals]		
No. of line items		1		0 Days in folder [HK9 Level 04]		
HK9 Level 04 [2 results]						
 1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	 Assign
Resubmitted requisition						
Requisition Name		2016-10-12 jlwilson7 01		Folders 0 Days in folder [My PR Approvals]		
No. of line items		1		0 Days in folder [HK9 Level 04]		
 1707553	Amazon.com Corporate Credit	Not Assigned	11/28/2016 8:50 AM	Tina Guilbert	20.61 USD	 Assign 
Requisition Name		2016-11-11 tgyerble 01		Folders 0 Days in folder [HK9 Level 04]		
No. of line items		1				


To move multiple requisitions, click in the **checkbox** for each requisition. From the Apply Action to Selected PR action box, select **Assign** and click **Go**.

Once the requisitions have been assigned, the queue displays with the Approver handling the review.


Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
 1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	 Approve
Resubmitted requisition						
Requisition Name		2016-10-12 jlwilson7 01		Folders 0 Days in folder [My PR Approvals]		
No. of line items		1		0 Days in folder [HK9 Level 04]		

IV. Reviewing a Requisition

An Approver can review all the details of a requisition. From **My PR Approvals**, select the “quick view” icon the right of the requisition number.

My PR Approvals [1 result]		
Requisition No.	Suppliers:	Assigned Approver
 1684303 Resubmitted requisition	Staples Business Advantage \$	Tina Guilbert

This brings up a quick view of the requisition where the Approver can either approve the requisition or open the requisition for more detail.



Document Navigator Display

Group Results

Requisition Summary **1684303**

<Previous 0 of 2 Next>

Print Close

Approve

	General	Shipping	Billing
Status	Pending Financial Approval Level 4 (Tina Guilbert)	Ship To Attn: Justin Wilson MSC Code 1900 12th Street Lynchburg, VA 24501 United States	Bill To Liberty Univ Accounts Payable, MSC Box #710305 1971 University Blvd Lynchburg, VA 24515 United States
Submitted	11/28/2016 9:23 AM		
Cart Name	2016-10-12 jlwilson7 01		
Description			
Business Unit	Administration (MBU019)		
Home Department	Finance Infrastructure (IH1005)		
			Billing Options

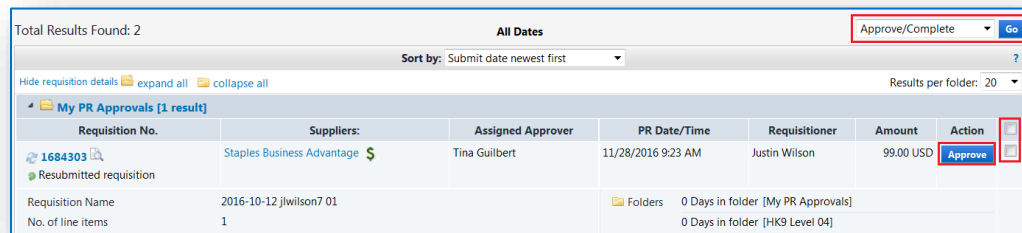
Once the requisition is open, the Approver should review the **Internal Notes and Attachments** and **the External Notes and Attachments** sections to review the comments.

V. Approving a Requisition

There are several ways to approve a requisition.

A. Quick Approvals

If you are familiar with the contents of a requisition you may not need to open it before approving it. **This is not a recommended practice**; however, if you are certain the requisition is correct you can assign it to your queue and click the **Approve** button. To approve multiple requisitions, once they are assigned to your queue, click the **checkbox** for each requisition and using the **Assign** dropdown menu, select **Approve/Complete** and click **Go**. The requisitions are approved and an email is sent to the Requestor.

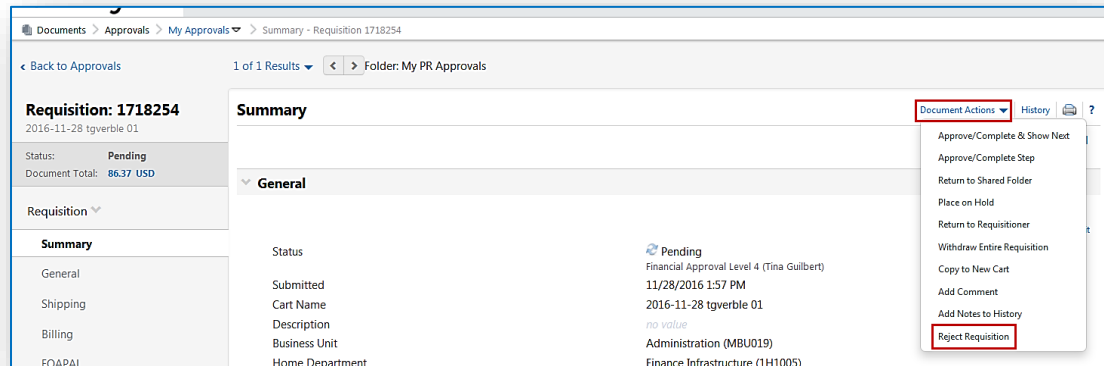


B. Standard Approvals

Standard approvals require the Approver to open the order and review the information. Once the items are reviewed, the Approver will scroll to the top of the requisition and in the **Assign** dropdown menu and select **Approve/Complete Step** and click **Go**. The requisition is approved and an email is sent to the Requestor.

VI. Rejecting a Requisition

Click the **requisition number** link to open the requisition. Once you decide the entire requisition is to be rejected, from the Document Actions action box at the top, select **Reject Requisition** and click **Go**.



Rejecting a requisition will open a warning box.

Enter the reason for the rejection in the **Reject Requisition** dialog box and click the Reject Requisition button. The requisition is removed from the **my PR Approvals** queue and the Requestor will receive an email notifying them of the rejection along with the rejection reason.

The 'Reject Requisition' dialog box has a title bar with a close button. The main content area contains a warning: 'WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click Reject Requisition or Cancel to leave the PR unchanged.' Below the warning is a text area labeled 'PR Reject Reason' with the text 'This is not the correct item'. A character count '972 characters remaining' is shown below the text area. At the bottom, there are two buttons: 'Reject Requisition' and 'Close'.

A. Reject Selected Items

Click the **requisition number** link to open the requisition. Click in the **checkbox** to the right of the line item you need to reject.

Scroll to the Supplier/Line Item Details section. In the **Selected Line Item Actions** box, select **Reject Selected Items** and click **Go**.

The screenshot shows the 'Lines' section of a requisition. At the top, there's a header for 'Staples Business Advantage' with a 'more info...' link. Below this, a table lists line items. The first line item is 'BIC Cristal Stick Ballpoint Pens, Medium Point, 1.0 mm, Black Ink / Clear Barrel, 12/Pk'. The table columns include Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The 'Reject Selected Items' button is highlighted in the 'Selected Line Item Actions' dropdown menu.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 BIC Cristal Stick Ballpoint Pens, Medium Point, 1.0 mm, Black Ink / Clear Barrel, 12/Pk	BICMS11BK	DZ	1.95	1 DZ	1.95 USD

The Reject Line Item dialog box opens allowing the Approver to enter a reason for rejecting. It is recommended that you enter the reason for rejecting so it will be included in the email to the Requestor as well as remain with the history of the requisition. Click the **Reject Line Item** button.

The 'Reject Line Item' dialog box is shown. It has a title bar with the text 'Reject Line Item' and a close button. The main area is labeled 'Reject Line Reason' and contains a text input field with the text 'This item was ordered previously'. Below the input field, it says '968 characters remaining'. At the bottom, there are two buttons: 'Reject Line Item' and 'Close'.

Return to the top of the screen. In the Document Actions action box, select **Approve/Complete Step**. This action will approve the requisition and reject the selected item.

The pending requisition leaves **My PR Approvals** queue and continues through PR Approvals.

*NOTE: If you need to un-reject an item and the requisition as not been completed, view the item again and click in the **checkbox**. In the “For selected line items action” box you now have an **Un-reject Selected Item** option. Select that option and click **Go**. The item is active again.*

The Approver also has the option to **add the rejected item to another cart** by view the requisition, selecting the item and choosing that option from the **Selected Line Item Actions** menu.

The screenshot displays a requisition line item for "BIC Cristal Stick Ballpoint Pens, Medium Point, 1.0 mm, Black Ink / Clear Barrel, 12/Pk". The item is marked with a red 'X' and a 'more info...' link. A dropdown menu titled "Selected Line Item Actions" is open, showing options: "Withdraw Selected Items", "Add to Favorites", "Add To Active Cart" (highlighted with a red box), and "Add To Draft Cart or Pending PR/PO" (also highlighted with a red box). The main table lists item details including Manufacturer Name (BIC CORPORATION), Manufacturer Part Number (BICMS11BK), and Supplier Part Auxiliary ID (44121704). The table also shows a "Taxable" status with a red 'X' and "Capital Expense" with a red 'X'. The "Internal Note" field is empty, and the "External Note" field contains "Attachments for supplier".

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 X BIC Cristal Stick Ballpoint Pens, Medium Point, 1.0 mm, Black Ink / Clear Barrel, 12/Pk more info...	BICMS11BK	DZ	1.95	1 DZ	1.95 USD

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: 11/28/2016 3:18:18 PM
Line(s): 1, 2, 3

Manufacturer Name: BIC CORPORATION Taxable: **X** Internal Note: no note
Manufacturer Part Number: BICMS11BK Capital Expense: **X** Internal Attachments:
Supplier Part Auxiliary ID: 44121704 External Note: no note
Commodity Code: Ball point pens Attachments for supplier

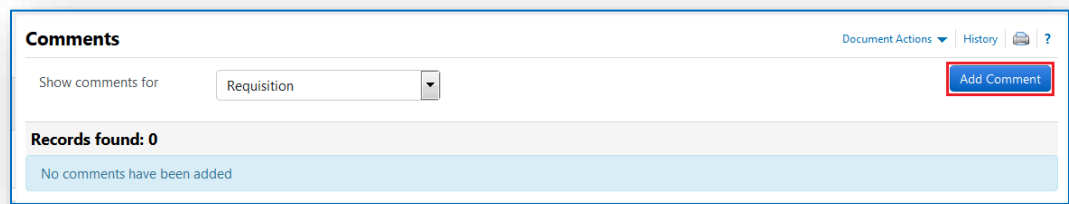
VII. Adding a Comment to a Requisition

Comments can be added to a requisition. Doing so provides a way for Approvers to communicate to the Requestor and allows additional documentation to be attached if needed. Comments differ from internal notes in that comments can be replied to. Comments are always available even if a requisition is in workflow and even after the PO is issued. An email notification can be sent when the Add Comment feature is being used. Internal notes become part of the requisition and are visible on the requisition and they also display in the History tab.

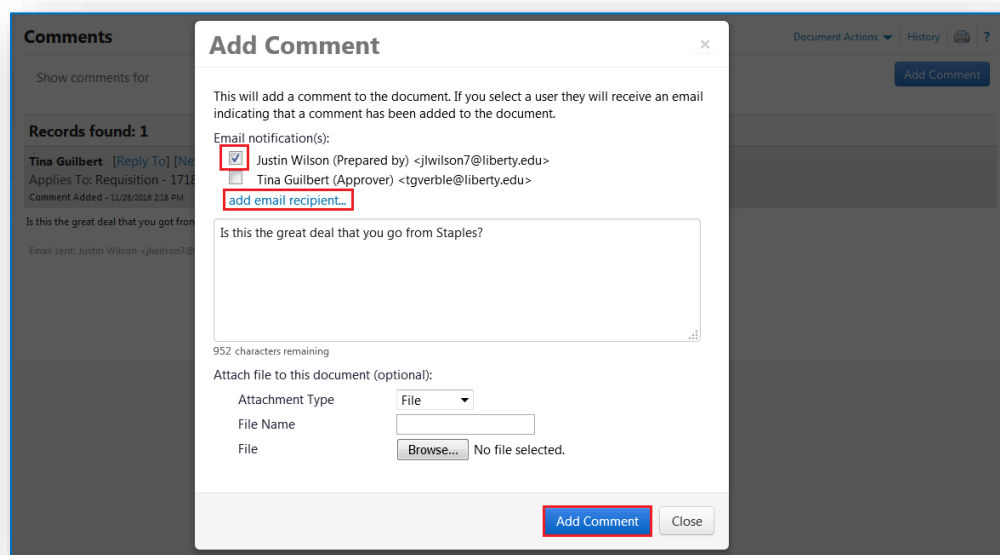
- Open the requisition.
- Click **Comments**.
- Click the **Add Comment** button or from the **Document Actions** action box, select **Add Comment**.

The screenshot displays the 'Summary - Requisition 1718282' page. The breadcrumb trail at the top reads: Documents > Approvals > My Approvals > Summary - Requisition 1718282. Below the breadcrumb, there is a 'Back to Approvals' link and a '1 of 2 Results' indicator. The main content area is divided into two columns. The left column contains a 'Requisition' section with the title 'Requisition: 1718282' and the date '2016-11-28 jlwilson7 02'. Below this is a 'Summary' section with a list of tabs: General, Shipping, Billing, FOAPAL, Internal Notes and Attach..., Payment Information, Prepaid/Deposit Information, External Notes and Attach..., Supplier Information, and Taxes, Shipping & Handling. The 'Comments' tab is highlighted with a red box. The right column contains a 'Summary' section with a 'General' tab. The 'General' tab is expanded, showing a list of fields: Status, Submitted, Cart Name, Description, Business Unit, Home Department, Requester, Include justification for NSF order, Reason for NSF request, Multi Year Indicator, Paid on PCard, and Buyer Name. Below the 'General' tab is a 'Shipping' tab, which is also expanded, showing a 'Ship To' section.

The Add Comment dialog box displays.



Select the individual to receive the email notification. If the recipient is not listed, click the **add email recipient** link. The User Search box displays. Search for the person you need to communicate with. Enter the text or attach a file and click the **Add Comment** button. The recipient will receive an email.



The email recipient(s) receives the message. The receiver(s) click on the link provided in the email which brings them directly to the comment tab for that requisition.

The screenshot shows a web interface for a requisition. On the left, a sidebar lists 'Requisition: 1718282' with details: '2016-11-28 jhwilson7 02', 'Status: Pending', and 'Document Total: 4.34 USD'. Below this are links for 'Requisition >', 'Comments' (highlighted with a red circle and a '1' badge), 'Attachment Overview', 'PR Approvals', and 'PO Preview'. The main content area is titled 'Comments' and includes a 'Show comments for' dropdown set to 'Requisition' and an 'Add Comment' button. It states 'Records found: 1' and displays a comment from 'Tina Guilbert' with links for '[Reply To]' and '[New Comment]'. The comment text is 'Is this the great deal that you got from Staples?' and includes a timestamp and email address.

Click on the [Reply To](#) link, add additional comments or attach files.

The screenshot shows a modal window titled 'Add Comment'. It contains instructions: '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.' Under 'Email notification(s):', there are two checkboxes: 'Justin Wilson (Prepared by) <jhwilson7@liberty.edu>' (unchecked) and 'Tina Guilbert (Approver) <tgverble@liberty.edu>' (checked). A link 'add email recipient...' is below. A large text area for the comment is present, with '1000 characters remaining' indicated. Below this is the 'Attach file to this document (optional):' section, which includes a dropdown for 'Attachment Type' (set to 'File'), a 'File Name' input field, and a 'File' section with a 'Browse...' button and the text 'No file selected.' At the bottom right are 'Add Comment' and 'Close' buttons.

When a file is attached via the Comment tab, it displays in the Internal Notes and Attachments section of the requisition. It becomes an active link – click on the link to display the information.

Requisition: 1718282
2016-11-28 jwilson7 02

Status: Pending

Document Total: 4.34 USD

Requisition

Summary

General

Shipping

Billing

FOAPAL

Internal Notes and Attac...

Internal Notes and Attachments

Internal Note

no note

Internal Attachments

Add Attachments

Icon.5A130D87.C95... (3,599k)

Bank Code

E

BB&T ePayables Bank Account

Lines

Staples Business Advantage

more info

All correspondence is also recorded in the History tab of the requisition.

Notes and Attachments

Document Actions History

History - Requisition 1718282 - Liberty University

https://usertest.sciquest.com/apps/Router/ReqAuditTrail?ReqId=1718282&ViewContentOnly=true&tmstmp=1480361370794

Click to filter history ?

Export CSV

Results Per Page 20

Records found: 11

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To
	11/28/2016 2:28 PM	Tina Guilbert		Comment Added			
	11/28/2016 2:28 PM	Tina Guilbert		Attachment Added	Internal Attachments	empty	Icon.5A130D87.C956.4889.8698.E616D7A6

Ext. Price

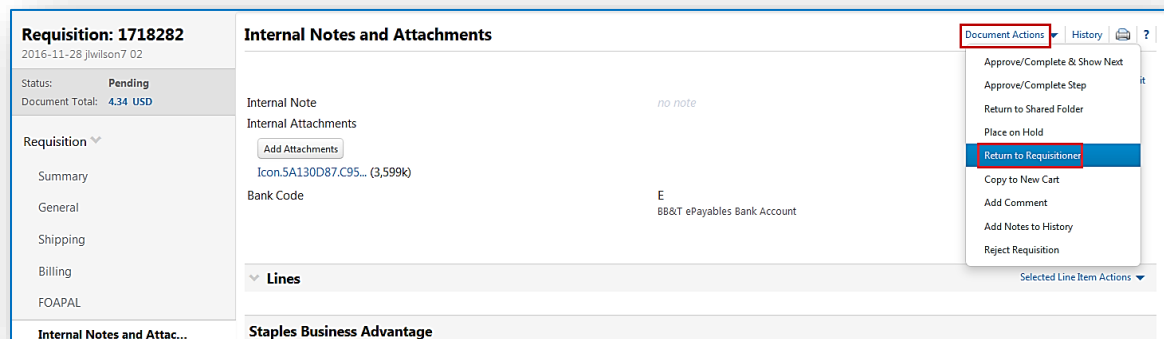
4.34 USD

 **Note: Remember to be professional as notes and comments are visible to vendors.**

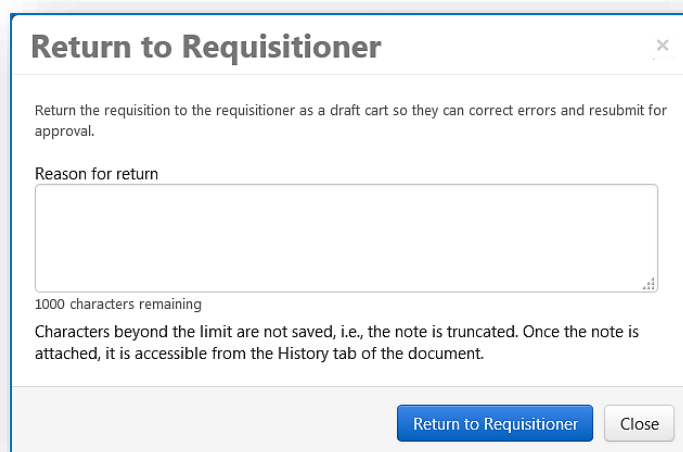
VIII. Returning a Requisition to the Requestor

Occasionally an Approver may need to return a requisition to the Requestor for updates to custom fields or line details. This allows Approvers to return instead of rejecting a requisition. When a requisition is returned it becomes a draft cart and is no longer visible as a requisition via history. The Approver should enter notes in the Comment tab before sending. The returned requisition is updated by the Requestor and resubmitted into workflow and all previous approval information and comments will be available via History. The returned requisition will restart workflow from the beginning regardless of the step it was returned from.

Open the requisition. From the Document Actions box, select **Return to Requestor**.



This will open up a new dialog box for the Approver to document the reason the requisition was returned.



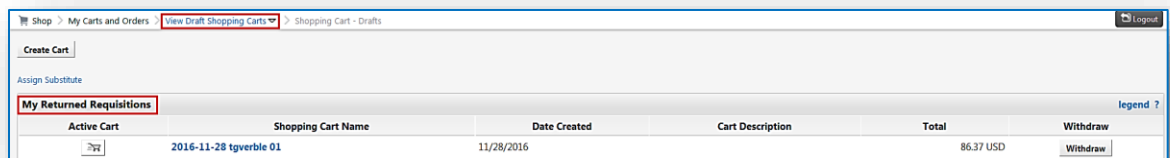
Once the reason is documented click the [Return to Requisitioner](#) button.

The Requestor will receive an email notifying that their cart was returned.

The requisition listed above has been returned by an approver.
You can review a read only version of this requisition by selecting
the URL below.

[View Requisition](#)

To access the returned cart the Requestor clicks on the [Shop](#) Icon on the navigation ribbon, then [My Carts and Orders](#) and [View Draft Shopping Carts](#). There will be a [My Returned Requisitions](#) queue above the My Draft carts. The Requestor can review the cart, review the Comments tab and the History tab, and make the appropriate changes or withdraw the cart completely.



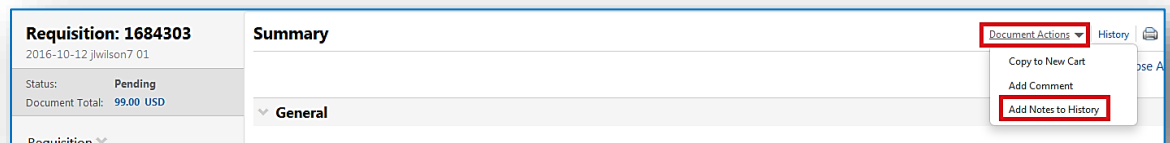
The screenshot shows a web application interface with a breadcrumb trail: Shop > My Carts and Orders > View Draft Shopping Carts > Shopping Cart - Drafts. A 'Create Cart' button is at the top left. Below it is a link 'Assign Substitute'. The main section is titled 'My Returned Requisitions' with a 'Legend ?' link on the right. It contains a table with the following data:

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Withdraw
View	2016-11-28 tgyerble 01	11/28/2016		86.37 USD	Withdraw

IX. Add Notes to History

An approver has the ability to add notes regarding a requisition, directly to history. History notes do not generate an email but they do display in the comments tab as well.

From the Document Actions action box, select **Add Notes to History**.



The Add Notes to History dialog box displays. Add the appropriate text regarding this requisition and click the **Attach** button.

The dialog box titled 'Add Notes to History' contains a text area for a note. Below the text area, it states '1000 characters remaining' and 'Maximum allowed characters are 1000'. A warning message says: 'Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.' At the bottom right are 'Attach' and 'Close' buttons.

The note becomes part of this requisition history and can be viewed by clicking the History tab.

Click to filter history ?								
Export CSV								
Results Per Page 20			Records found: 17			Page 1 of 1 ?		
Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	11/28/2016 10:42 AM	Tina Guilbert		Requisition note added				This is a note for training purposes.
	11/28/2016 9:24 AM	System	Banner Budget Authorization	Requisition approved				

X. Returning a Requisition back to the Shared Queue

An approver may realize they aren't going to get to all the PR's they assigned to themselves and need to return them back to the shared queue. To do this, click in the **checkbox** to the right of the requisition line. From the Apply Action to Selected PR(s) select **Return to Shared Folder** and click **Go**.

Total Results Found: 1

All Dates

Sort by: Submit date newest first

Hide requisition details expand all collapse all

My PR Approvals [1 result]

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1718282	Staples Business Advantage	Tina Guilbert	11/28/2016 2:02 PM	Justin Wilson	4.34 USD	Approve
Requisition Name		2016-11-28 jwilson7 02		Folders		0 Days in folder [My PR Approvals]
No. of line items		1		Folders		0 Days in folder [HK9 Level 04]

HK9 Level 04 [1 result]

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1718282	Staples Business Advantage	Tina Guilbert	11/28/2016 2:02 PM	Justin Wilson	4.34 USD	Assign
Requisition Name		2016-11-28 jwilson7 02		Folders		0 Days in folder [My PR Approvals]
No. of line items		1		Folders		0 Days in folder [HK9 Level 04]

XI. My Recent Approvals

buyLU allows you to view the orders that you specifically reviewed.

From the **Documents** icon on the navigation ribbon, select the **Approvals** submenu, then **My Recent Approvals**. This feature allows the Approver to quickly have a snapshot of what orders they have processed. Use the Click to filter requisitions link if you wish to filter further.

Showing 1 - 3 of 3 Results

Last 30 days (10/30/2016-11/28/2016)

Show requisition details

Results Per Page 20

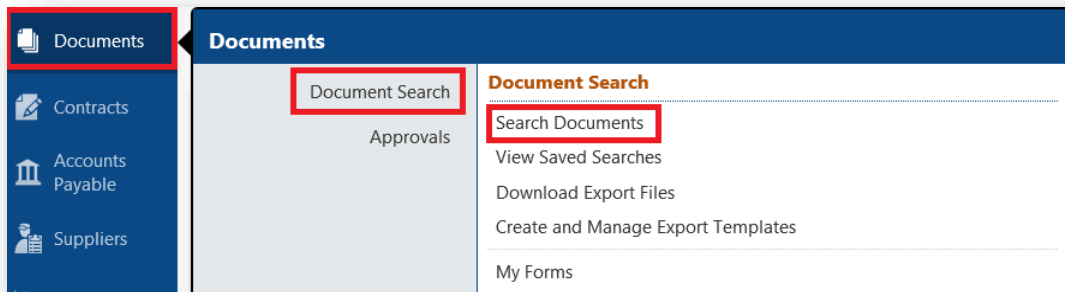
Sort by: Approval date newest first

Page 1 of 1

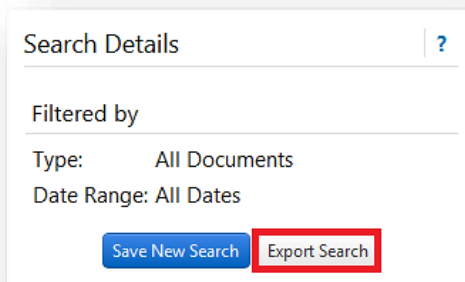
Requisition Number	My Action	Workflow Step	Approval Date/Time	Suppliers	Prepared For	Requisition Total
1718254	Requisition returned	Financial Approval Level 4	11/28/2016 2:40 PM	Staples Business Advantage	Tina Guilbert	86.37 USD
1707553	Requisition approved	Financial Approval Level 4	11/28/2016 11:49 AM	Amazon.com Corporate Credit	Tina Guilbert	20.61 USD
1684303	Requisition approved	Financial Approval Level 4	11/28/2016 11:49 AM	Staples Business Advantage	Justin Wilson	99.00 USD

XII. Reports

Document searches can be exported in buyLU. To export a document search use the slide out ribbon and choose **Documents**, the **Document Search**, then **Search Documents**. Choose the criteria than you need and click Search.



Under **Search Details** choose **Export Search**.



Pending and completed exports are available in **Documents > Document Search > Download Export Files**.

Results Per Page: 20		Results found: 2					Page 1 of 1	
File Name	Description	Request Date / Time	Expiration Date	Export File Size	Export Status			
Test Report.zip		1/5/2017 1:54 PM	1/12/2017	42.0 KBytes	Completed			
MyReport.zip		1/5/2017 1:47 PM	1/12/2017	42.0 KBytes	Completed			

The files are available as zip files, and when accessed they will open as a CSV file in Excel.

Document Type	Document Owner	Document Date/Time	Supplier	Document Total
Requisitions	Tina Guilbert	1/5/2017 13:32	Grainger Inc	6.07 USD
Requisitions	Tina Guilbert	1/5/2017 13:18	Staples Business Advantage	3.93 USD
Form Requests		1/5/2017 12:58		
Purchase Orders	John Palm	1/5/2017 12:48	Scoville Specialties Inc	9.99 USD
Requisitions	John Palm	1/5/2017 12:47	Scoville Specialties Inc	9.99 USD
Purchase Orders	John Palm	1/5/2017 12:46	Grainger Inc	454.33 USD
Requisitions	John Palm	1/5/2017 12:45	Grainger Inc	454.33 USD
Requisitions	Ann Alldredge	1/5/2017 12:15	Harris Office Furniture Company Inc	1447.00 USD