buyLU

Approver Manual

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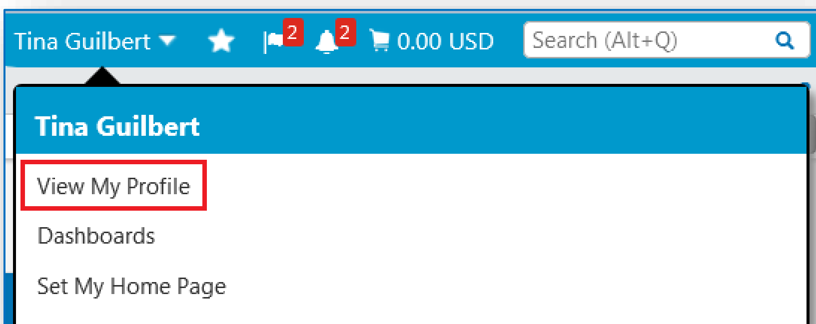
Approving Orders

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

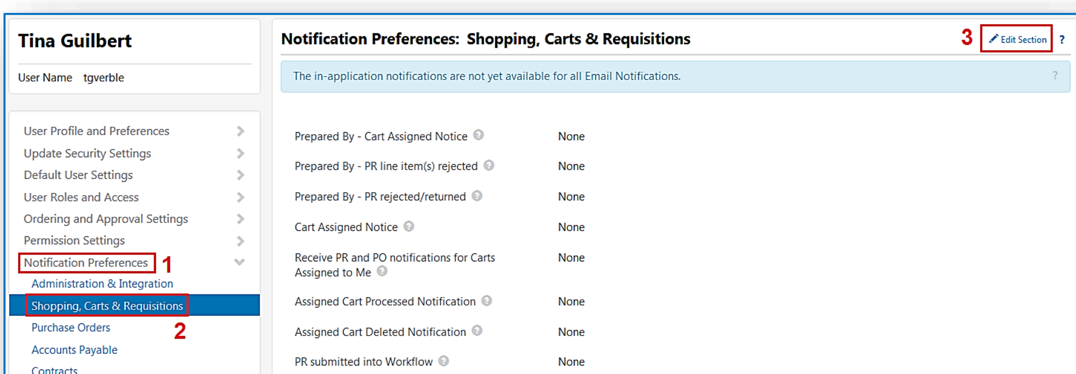
If part of a requisition is rejected the remaining items continue in the process. Comments and attachments can be sent back and forth between Approvers and Requestors during the approval process.

I. Approval Email and Notifications

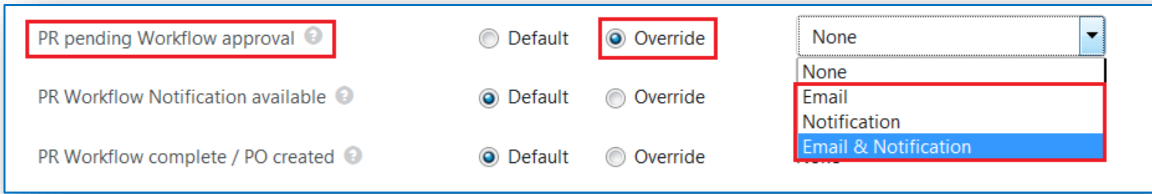
By default buyLU is set for the user to not receive notifications of documents pending approval. Access this feature from **View My Profile**.



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



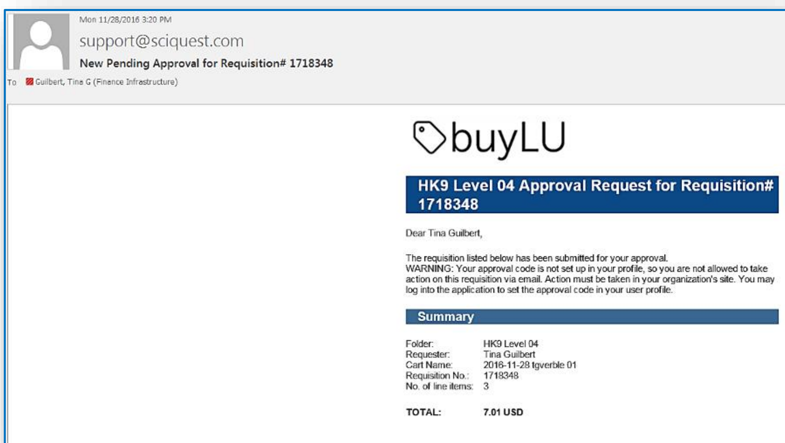
Choose PR pending Workflow approval, Override, then select either Email, Notifications (within buyLU), or both Email & Notification.

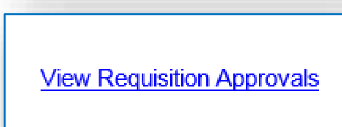


II. Approving Carts within a Workflow

A. Email Notification

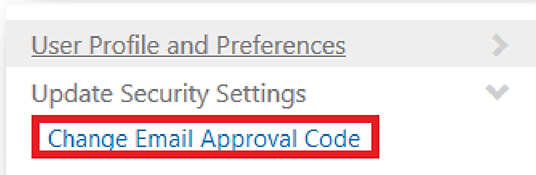
Once the email notification setting is updated the Approver will receive an email notification alerting them there is a requisition needing their approval. The Approver can access the approvals screen within buyLU by clicking the **View Requisition Approvals** link provided within the body of the email.



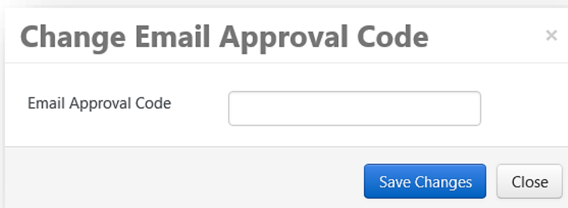


Approvers also have the option to approve a requisition **within the email notification**. In order to do so they will need a 4-digit approval code. This is set up within the Approver's profile.

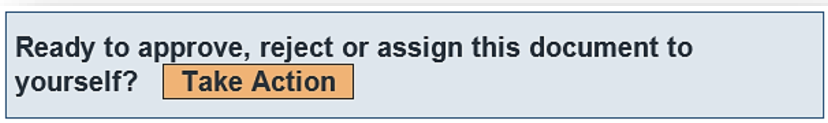
Within the profile go to "**Update Security Settings**" – "**Change Email Approval Code**."



Enter a pin number of his or her own choosing and **Save Changes**.



When the email notification arrives it will contain this box:



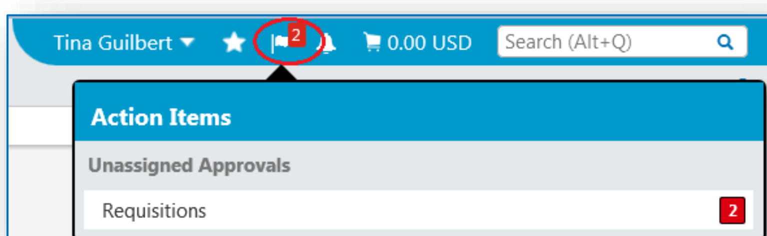
You will be able to approve, reject, or assign the document from within the email notification by clicking "**Take Action**" and using your pin number.

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

B. *Approving Carts Within buyLU*

1. Action Items

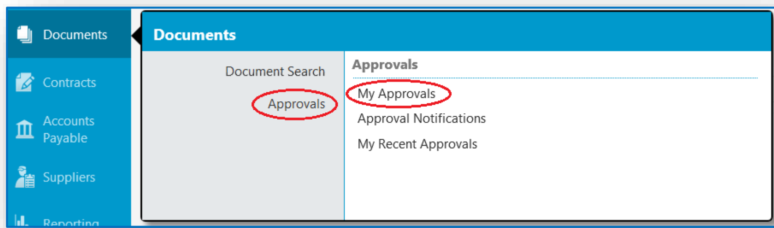
Within the buyLU site, the Approver can view requisitions pending approval from the home/shop tab notice the Action Items link. Click the **Action Items Notifications**



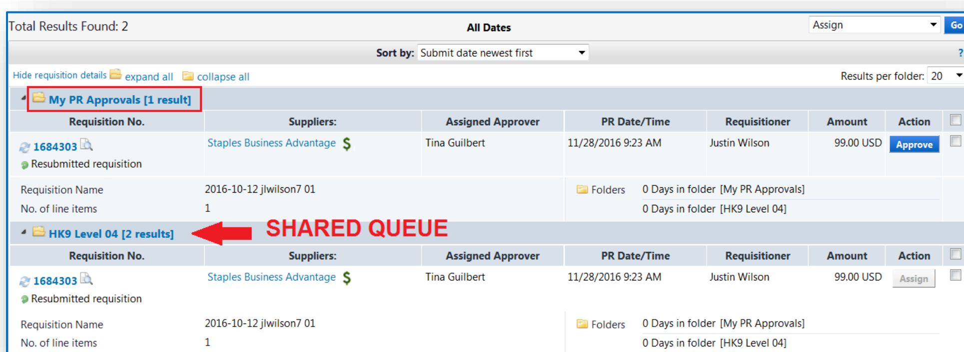
link. The Approver can view how many approvals are currently waiting in the queue for approval.

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**.



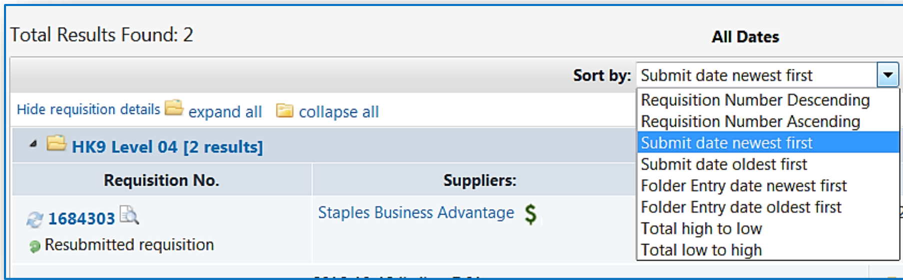
The section at the top of the screen is the **My Approvals** queue. When a document is in this queue, the Approver owns it.



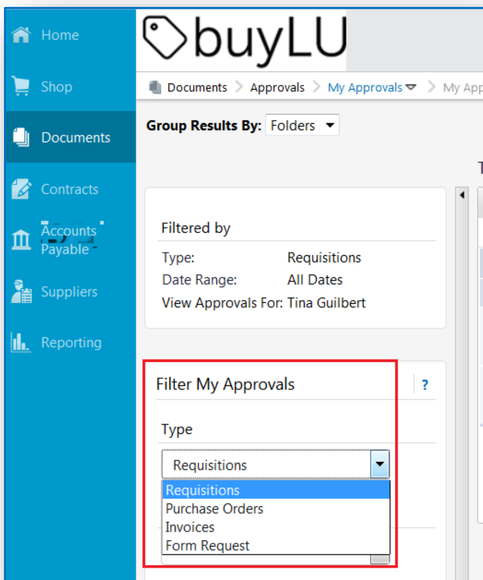
Shared queues can be accessed by one or more Approvers and are displayed ***under*** the My PR Approvals queue. The actual queue that displays for an Approver is dependent on what they are responsible for approving.

3. **Sort by**

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



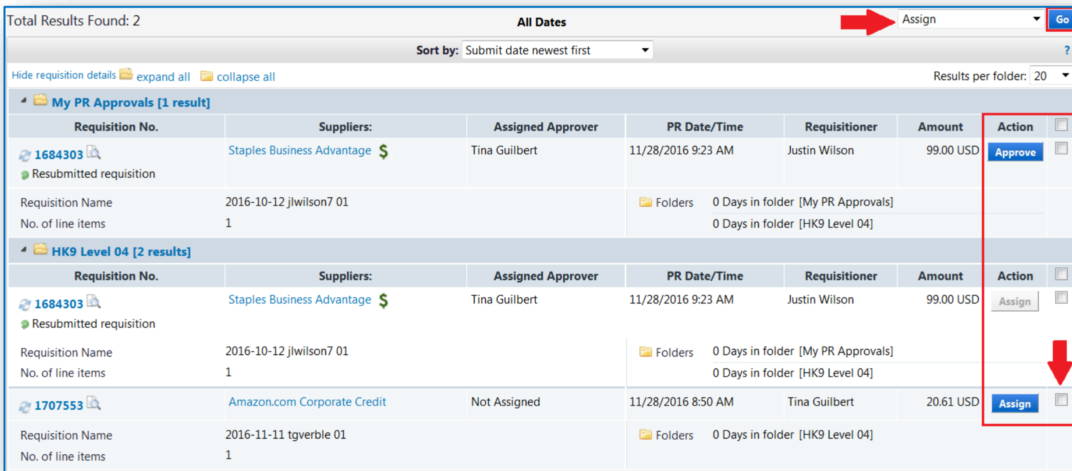
4. **Filter My Approvals**
The Approver can also filter approvals by type using the **Filter My Approvals** option.



III. Moving a Requisition to My Approvals

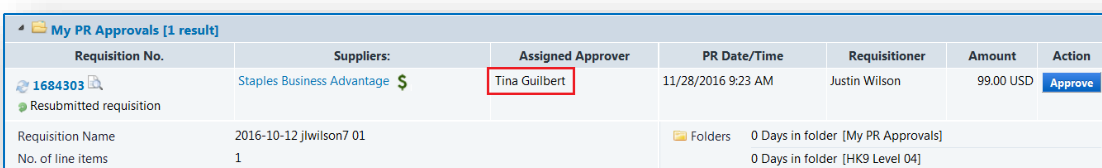
Some requisitions requiring review automatically go to your approvals queue. If an approval step is *shared* by more than one person, the document is assigned to the approval queue and an Approver must move the requisition into their queue to review. As items are assigned from the shared queue to the 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.



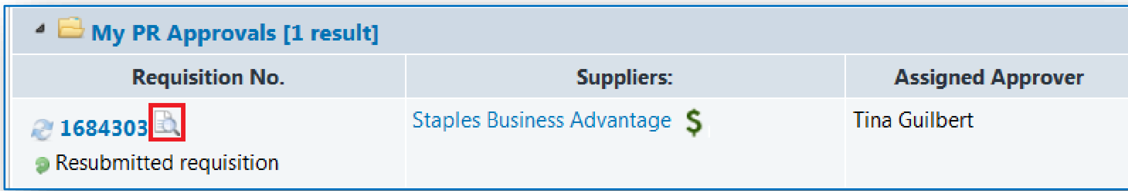
To move multiple requisitions, click in the **checkbox** for each requisition. From the Apply Action to Selected PR action box, select **Assign** and click **Go**.

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

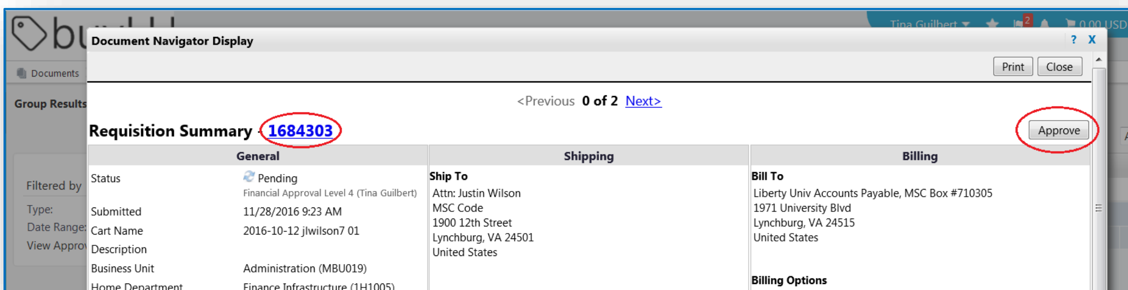


IV. Reviewing a Requisition

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.



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



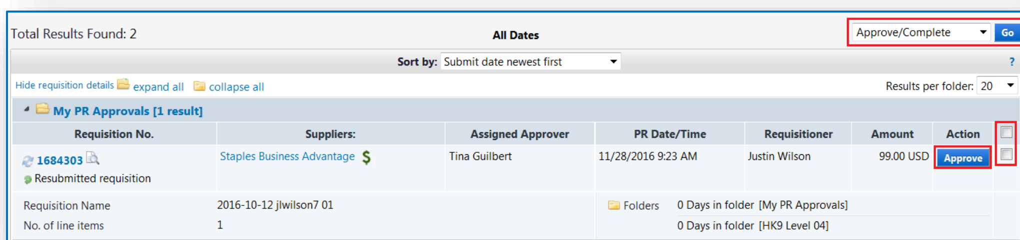
Once the requisition is open, the Approver should review the **Internal Notes and Attachments** and **the External Notes and Attachments** sections to review the comments.

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.

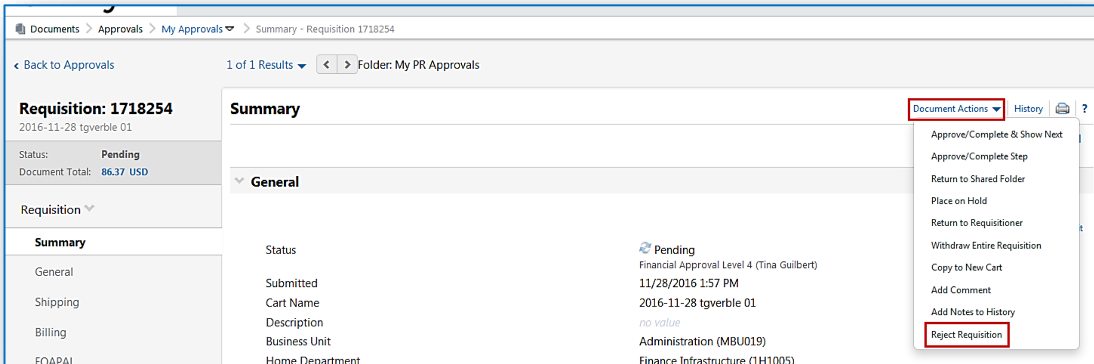


B. *Standard Approvals*

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.

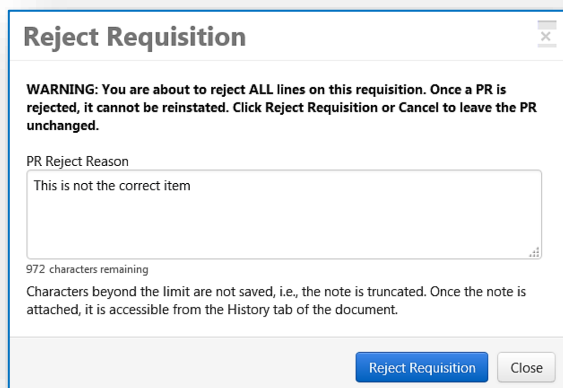
VI. Rejecting a Requisition

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.

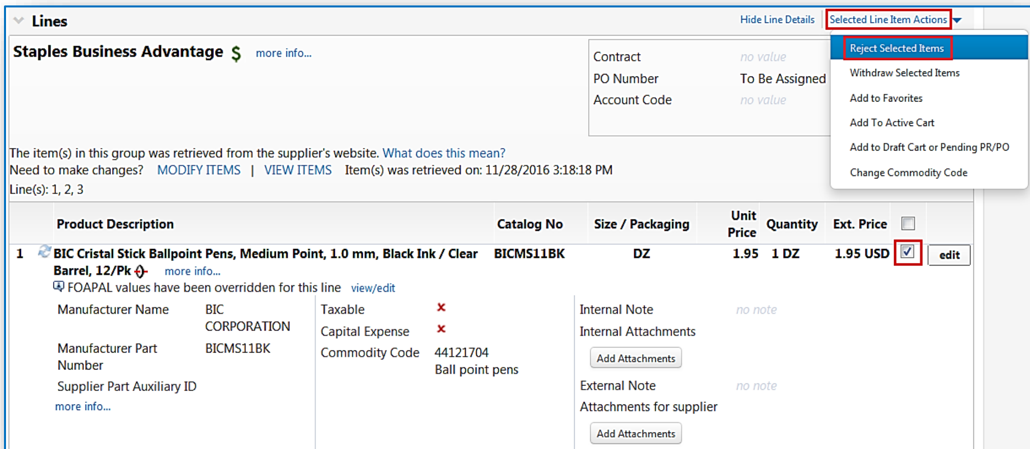
Enter the reason for the rejection in the **Reject Requisition** dialog box and click the Reject Requisition button. The requisition is removed from the **my PR Approvals** queue and the Requestor will receive an email notifying them of the rejection along with the rejection reason.



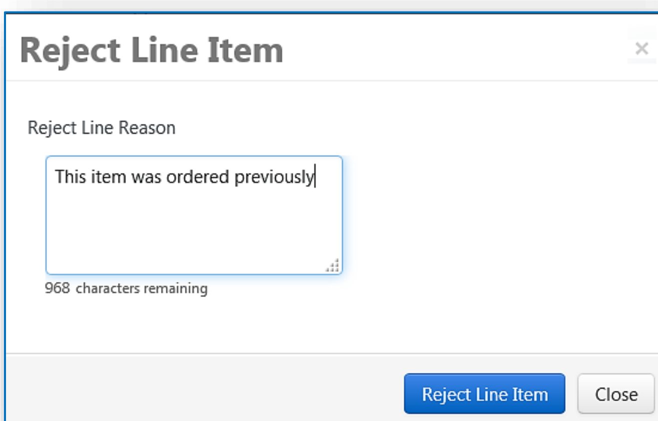
A. *Reject Selected Items*

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 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.

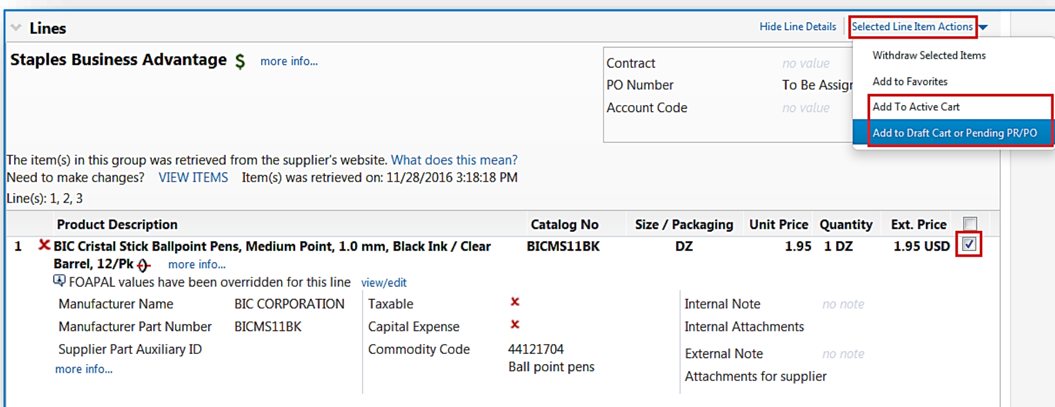


Return to the top of the screen. In the Document Actions action box, select **Approve/Complete Step**. This action will approve the requisition and reject the selected item.

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.*

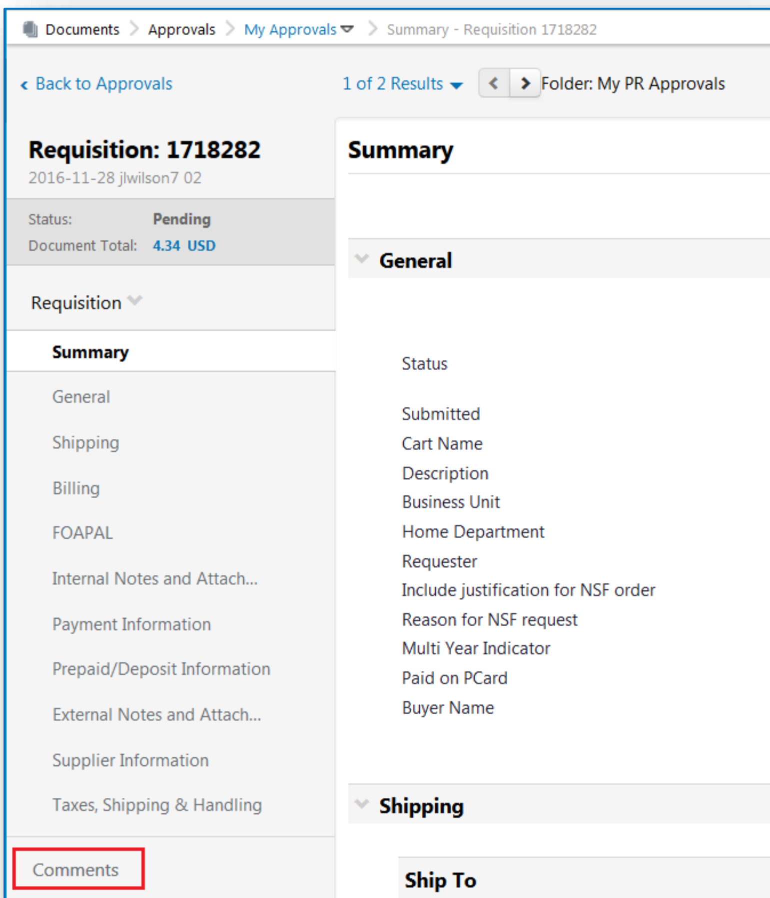
The Approver also has the option to **add the rejected item to another cart** by view the requisition, selecting the item and choosing that option from the **Selected Line Item Actions** menu.



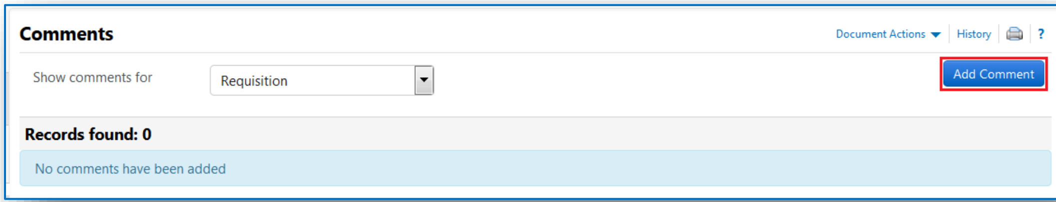
VII. Adding a Comment to a Requisition

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.

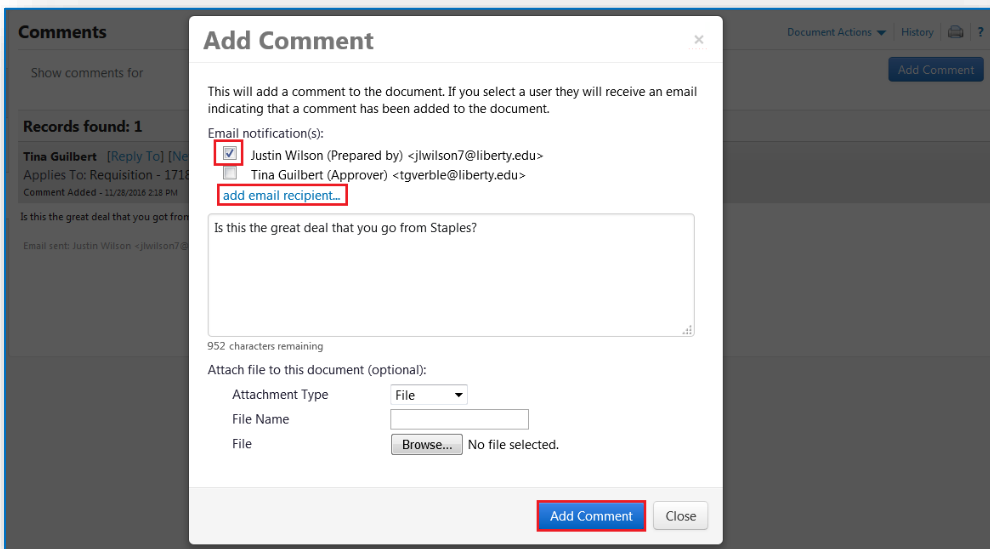
- Open the requisition.
- Click **Comments**.
- Click the **Add Comment** button or from the **Document Actions** action box, select **Add Comment**.



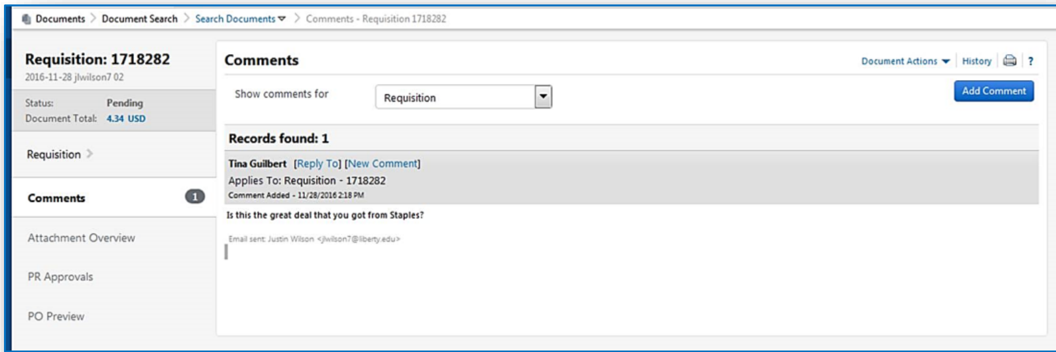
The Add Comment dialog box displays.



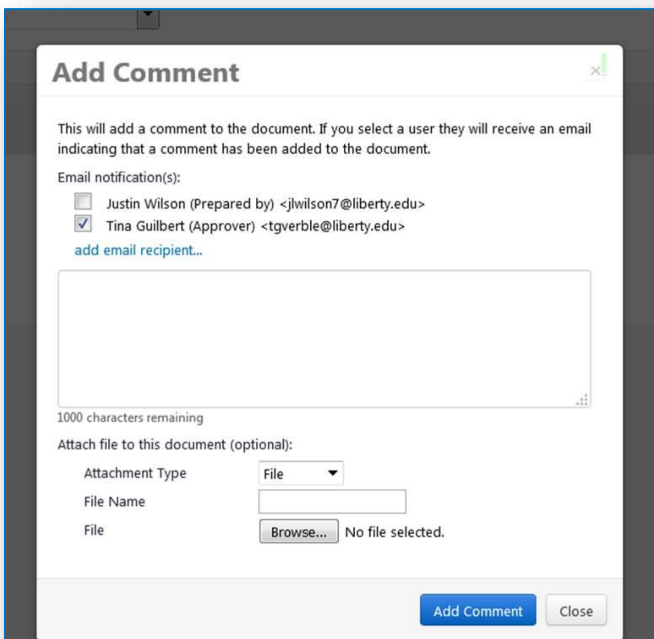
Select the individual to receive the email notification. If the recipient is not listed, click the **add email recipient** link. The User Search box displays. Search for the person you need to communicate with. Enter the text or attach a file and click the **Add Comment** button. The recipient will receive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



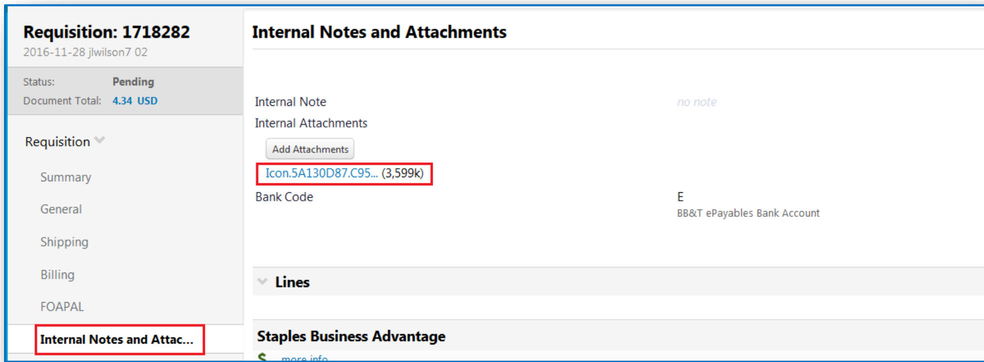
The email recipient(s) receives the message. The receiver(s) click on the link provided in the email which brings them directly to the comment tab for that requisition.



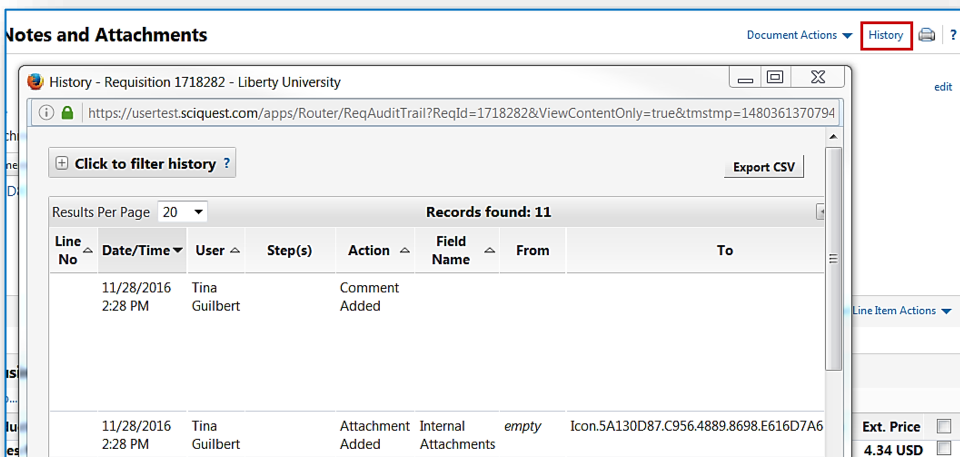
Click on the **Reply To** link, add additional comments or attach files.



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.



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

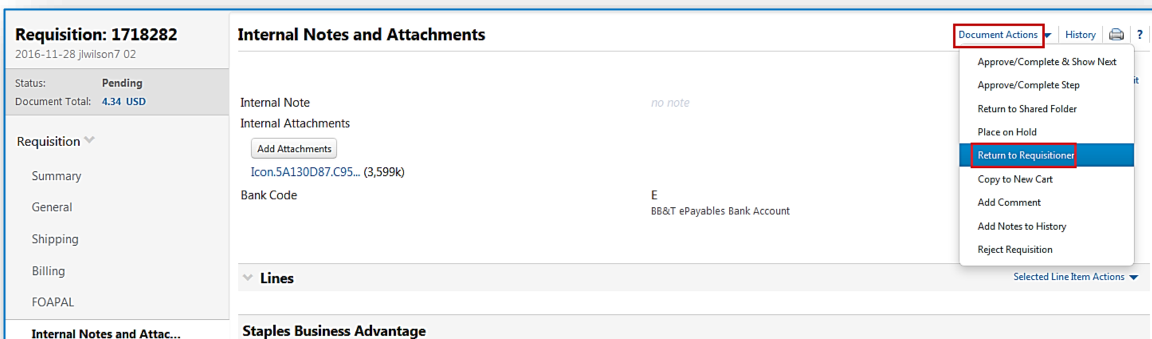


Note: Remember to be professional as notes and comments are visible to vendors.

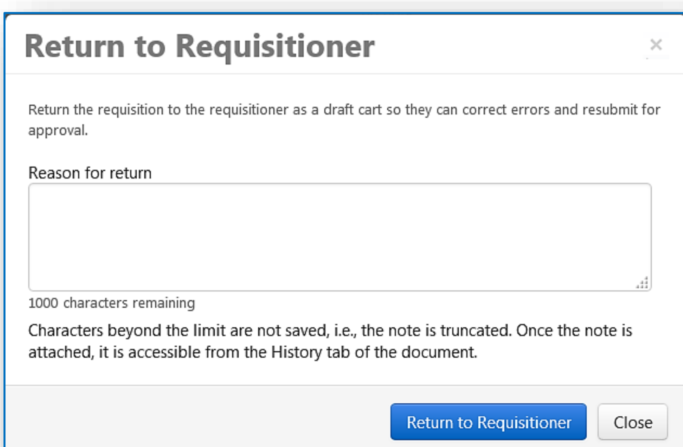
VIII. Returning a Requisition to the Requestor

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**.

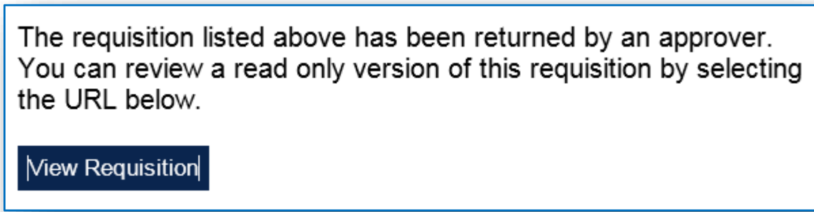


This will open up a new dialog box for the Approver to document the reason the requisition was returned.

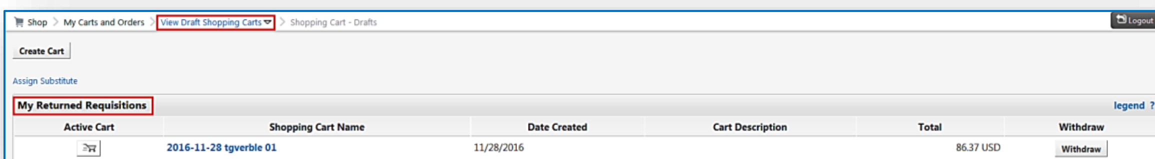


Once the reason is documented click the **Return to Requisitioner** button.

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



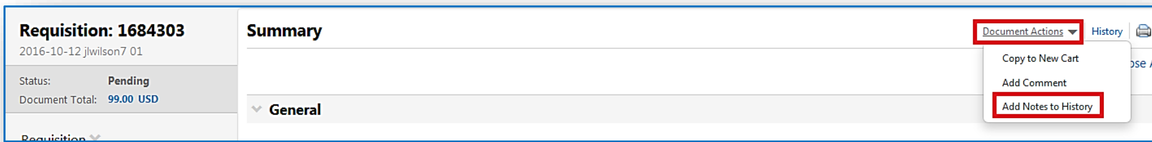
To access the returned cart the Requestor clicks on the **Shop** Icon on the navigation ribbon, then **My Carts and Orders** and **View Draft Shopping Carts**. There will be a **My Returned Requisitions** queue above the My Draft carts. The Requestor can review the cart, review the Comments tab and the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



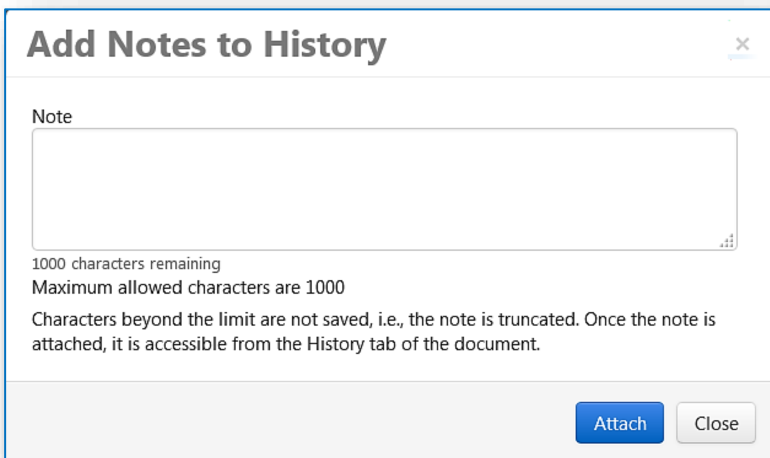
IX. Add Notes to History

An approver as 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.

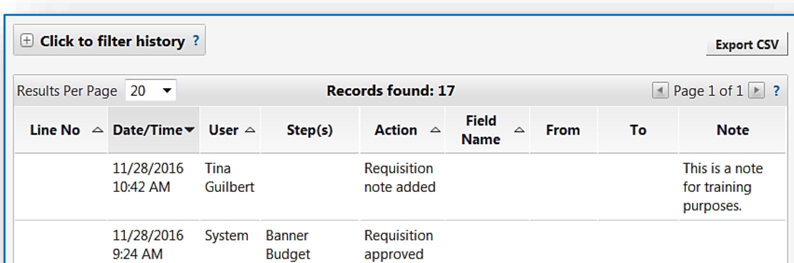
From the Document Actions action box, select **Add Notes to History**.



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

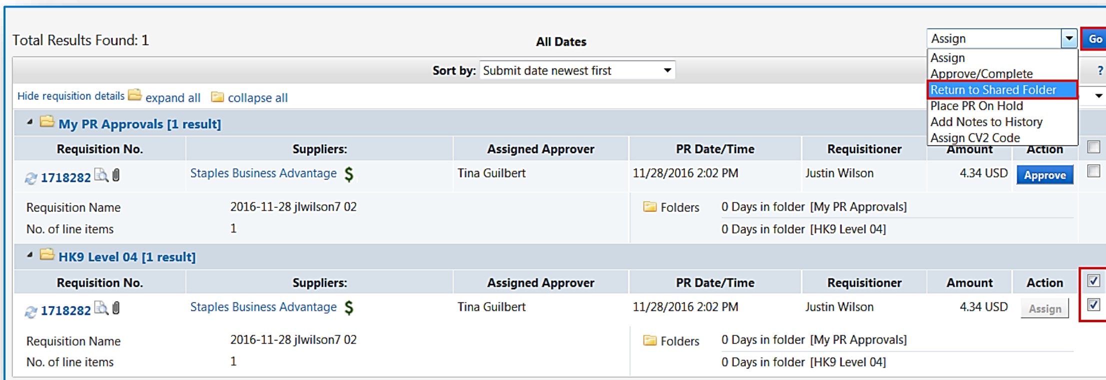


The note becomes part of this requisition history and can be viewed by clicking the History tab.



X. Returning a Requisition back to the Shared Queue

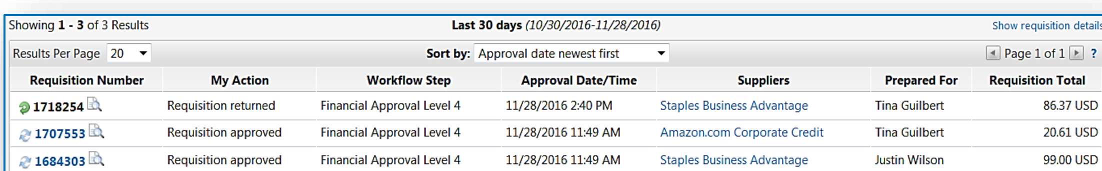
An approver may realize they aren't going to get to all the PR's they assigned to themselves and need to return them back to the shared queue. To do this, click in the **checkbox** to the right of the requisition line. From the Apply Action to Selected PR(s) select **Return to Shared Folder** and click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



XI. My Recent Approvals

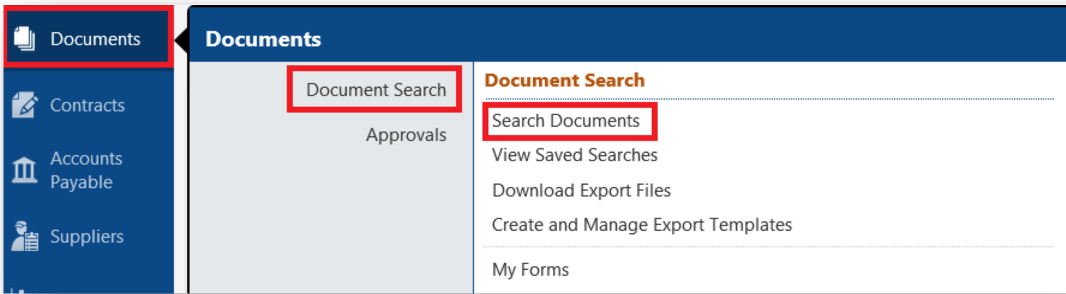
buyLU allows you to view the orders that you specifically reviewed.

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.

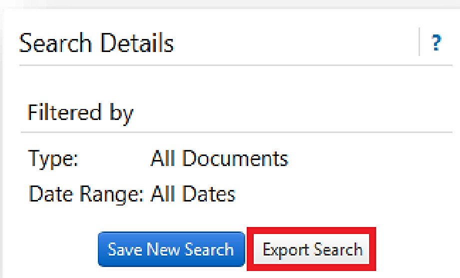


XII. Reports

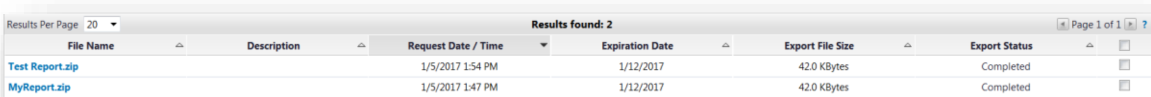
Document searches can be exported in buyLU. To export a document search use the slide out ribbon and choose **Documents**, the **Document Search**, then Search Documents. Choose the criteria than you need and click Search.



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



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



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