

# buyWays Approver Training

For all approvers

☐ This training document details the following approval tasks

- Approval via Email
  - Approval Code Setup
  - Approve via Email
- Quick Approval in buyWays
- Approval Extended View
- Assign Requisition to Yourself
- Line Item Rejection
- Return Requisition to Requisitioner
- Requisition Outbox
- Review
- User Profile Setup / Email Preferences

☐ Refer to the buyWays Training web page for additional training materials: <http://www.clemson.edu/cfo/procurement/buyWays/training.html>

☐ Contact:

- Penni Douglas [penni@clemson.edu](mailto:penni@clemson.edu) or call 864-656-5582
- buyWays Help Desk 864-656-5581 or [cubuyWays@clemson.edu](mailto:cubuyWays@clemson.edu)

This is a new feature available as of 7/25/2011

Approval Code Set Up

- This personal approval code must be set up in order to approve via email
- This feature allows approvers to take action from their email (at your desk or most mobile devices) without having to access buyWays.

Approval Code Set Up - Step by Step Instructions

- Login to [buyWays](#)
- Click **my profile**
- On the User Settings > User Identification tab
- Enter your personal approval code
  - It is recommended for your user code to match your Novel password
  - Must be a minimum of 4 characters
- Click **Save**
- See screenshots on the next panel

# Email Approval Code Set Up

The screenshot shows the Clemson buyWay\$ website interface. In the top navigation bar, the 'my profile' link is circled in red. Below the navigation bar, there is a search bar and a 'Go' button. The main content area features a 'Shop' section with a dropdown menu set to 'All' and a 'Go' button. Below the search bar, there are links for 'Jump to: all favorites | add non-catalog item | quick order' and 'additional search options: all suppliers | categories | all contracts'. The 'My Dashboard' section is visible, with a link to 'service contracts (direct links to supplier external websites)'. The 'User Settings' page is open, with the 'User Identification' tab selected. The 'Email Approval Code' field is highlighted with a red box, and a green arrow points to the 'Save' button at the bottom of the form.

**User Settings** | Purchasing | Permissions | History

**User Identification** | Personal Settings | Roles | Document Access | Email Preferences | Navigation Setup

First Name: Clemson  
Last Name: Approver  
Phone Number: 1 864 656-5582  
Country Code, Area, Phone Number, Extension: +1 (864) 656-5582  
E-mail Address: penni@clemsion.edu  
Department: 5365  
Position:   
User Name: approver  
Authentication Method: Local  
Email Approval Code:   
Save

## Approval via Email

- Once the Approval Code is Set Up, approvers will be given new options to approve from their email
- To utilize this option, click on the **Take Action** button in your email notification
- To approve, you simply need to check **Approve**, enter your code, and **Submit**
- Note – you may choose other actions such as **Reject** or **Return to Requisitioner** if appropriate

# Approval via Email – Sample

Subject: New Pending Approval for Requisition# 607370

## Approval Request for Requisition# 607370

Dear Penni Douglas,

The requisition listed below has been submitted for your approval.

### Summary

Approval Folder: 5365 Department Approval  
 Requisitioner: Penni Douglas  
 Shopper: Allison Patton  
 Cart Name: 2011-07-20 jtonkin 01  
 Requisition No.: 607370  
 Priority: Normal  
 No. of line items: 1

**TOTAL: 14.34 USD**

### Details

#### Graybar Electric Company

**Item 1**  
 Description: U Bolts, Finish Zinc Plated, Thread Size 1/4 in 20 tpi, Inside Length 1-3/4 in  
 Catalog Number: 99449743  
 Quantity: 1  
 Unit Price: 13.40 USD  
 Ext. Price: 13.40 USD  
 Size/Packaging: EA  
 Taxable: Yes  
 Capital Expense: No  
 Commodity Code:  
 R&D Tax Exempt No  
 (50% or more of item usage will be for Research and Development):  
 Exemption Number:

**TOTAL: 14.34 USD**

### Accounting Codes

Account: 7201 - Supplies:Office  
 Fund: 15 - CU - State - E and G  
 Dept: 5365 - Procurement Services  
 Program: 602 - Fiscal Operations  
 Class: 130 - SC App E&G and Dept Revenues  
 Project: 1500000 - Departmental Default

**Click Take Action**

Ready to approve, reject or assign this document to yourself? **Take Action**

### Additional Information

#### Summary Details

Buyer:  
 Contact Phone Number:  
 Out to Bid: No  
 Comments: (0)

#### Other Possible Approvers

Scott Pigeon  
 Michael Nebesky

#### Shipping Address

Attn: Allison Patton  
 FI/Rm/Ste:  
 Procurement Svcs  
 Administrative Svcs Bldg  
 108 Silas N. Pearman Blvd  
 Clemson, SC 29634-5365  
 United States

[Click here to view the document in your organization's site.](#)

If you have any questions with regard to reviewing/approving this requisition, please contact your SelectSite Support Team.

Support Team Contact Information:  
 +1 (864) 656-5582  
[cubuways@clemson.edu](mailto:cubuways@clemson.edu)

Thank you,  
 Clemson BuyWays

# Email Approval Steps

Email Approvals: Requisition - 608808 - Windows Internet Ex  
https://usertest.sciquest.com/apps/Router/R  
McAfee  
File Edit View Favorites  
Favorites Suggested Sites Microsoft Exch  
Email Approvals: Requisition - 608808

### Clemson BuyWays

Requisition 608808  
Status Pending  
Shopper Penni Douglas  
Approver Clemson Approver

Select an action:

Approve  
 Assign to myself  
 Reject  
 Return to Requisitioner

Comment (Optional):

Enter your approval code to submit:

Submit

Click OK

Message from webpage

Are you sure you want to approve this?

OK Cancel

- Select an approval action
- Enter a comment (not required)
- Enter your approval code
- Click Submit

### Approve successful

Requisition 608808  
Shopper Penni Douglas  
Approver Clemson Approver

Close Approval Confirmation Window

# Quick Approval in buyWays

- This is the quick version of approval in buyWays. It is recommended that the approver review PR before approval.
- Click on the Approvals Tab
- Click in the box to put a check mark in the box on the right
- Select Approve/Complete from the dropdown menu
- Click GO The PR is now approved

The screenshot shows the buyWays interface with the 'approvals' tab selected. The top navigation bar includes 'field mgt.', 'contracts', 'approvals', 'history', 'settlement', and 'more >>'. Below the navigation bar, there is a search bar for 'PR No.' and a 'Go' button. A dropdown menu for 'Apply Action to Selected PR(s)' is open, showing options: 'Assign', 'Assign', 'Approve/Complete', 'Forward...', 'Place PR On Hold', and 'Add Notes to History'. The 'Approve/Complete' option is highlighted. Below the dropdown, there is a table with one requisition found. The table has columns for 'State', 'Priority', 'PR Date/Time', 'Requisitioner', 'Amount', and 'Action'. The requisition is 'Not Assigned', 'Normal' priority, dated '3/3/2009 3:15 PM', by 'NANCY J ROCHESTER', for an amount of '16,015.21 USD'. The 'Action' column shows 'Assign' with a checkmark. Below the table, the supplier is listed as 'BPC Hotel LLC'.

State	Priority	PR Date/Time	Requisitioner	Amount	Action
Not Assigned	Normal	3/3/2009 3:15 PM	NANCY J ROCHESTER	16,015.21 USD	Assign <input checked="" type="checkbox"/>

Suppliers: BPC Hotel LLC



- ❑ Click on the Approvals Tab
- ❑ Click the word Assign

**My Approvals** Select another approver: My Approvals

[+ Click to filter requisitions](#)

Hide requisition details Apply Action to Selected PR(s): Approve/Complete

Assign Substitute Apply Action to Selected PR(s): Assign

**- My PR Approvals** ?

Results per page: 50 Requisitions Found: 0 Page 1 of 1

Requisition No. ▼	State ▲	Priority ▲	PR Date/Time ▲	Requisitioner ▲	Amount ▲	Action	Select
<b>- 1325 Dept Approval &gt;2500</b>							
Results per page: 50 <span style="float: right;">Requisitions Found: 1</span> <span style="float: right;">Page 1 of 1</span>							
Priority ▲	PR Date/Time ▲	Requisitioner ▲	Amount ▲	Action	Select		
Normal	3/3/2009 3:15 PM	NANCY J ROCHESTER	16,015.21 USD	Assign	<input type="checkbox"/>		
Suppliers:		BPC Hotel LLC					
No. of line items:		1					

This is a shared folder, which means that there could be more than one approver assigned to that folder. Only one approver is required to approve a pending PR.

# Assigning the Requisition to Yourself

- ❑ The PR has moved from the shared folder to the My PR Approvals folder. By assigning a requisition to yourself, allows other users to see that the PR is assigned to an approver.
  - Click on view next to the PR number – this will open the PR to view more detail on the PR.

The screenshot shows the CLEMSON buyWay\$ interface. At the top, there's a navigation bar with 'Approvals - Requisitions' and a search box for 'PR No.'. Below this is a menu with options like 'home', 'carts', 'user mgt.', 'organization setup', 'workflow setup', 'field mgt.', 'contracts', 'approvals', 'history', and 'settlement'. The main content area is titled 'My Approvals' and includes a filter button '+ Click to filter requisitions'. Below this, there are two sections for requisitions. The first section, '- My PR Approvals', shows a table with one requisition: 10161795, which is in an 'Active' state with a 'Normal' priority. A green arrow points to the 'view' link next to the requisition number. The second section, '- 1325 Dept Approval >2500', shows the same requisition but with the 'State' set to 'Assigned' and the 'Approver' listed as 'Penni Douglas'. Both sections include details for the requisition, such as 'Cart Name: 2009-03-03 kari 01' and 'Suppliers: BPC Hotel LLC'.

# Approvals – Requisition Summary

- ❑ The Requisition Summary Tab displays the General, Shipping, Billing, Accounting Codes, Internal and External Notes and Supplier/Line Details. Use the scroll bar to scroll down to see additional line description and product details.
- ❑ After review, Available Actions = Approve/Complete Step, click Go, the PR is approved

**Summary - Requisition 10161795**

Available Actions: **Approve/Complete Step** **Go**

**General**

Status: Pending Approval (Pam Douglas)  
 Submitted: 3/3/2009 3:15 PM  
 Cart Name: 2009-03-03 kari 01  
 Description: Normal  
 Priority: NANCY J ROCHESTER

**Shipping**

Ship To: Attn: NANCY J ROCHESTER  
 P/Rm/Ste: 245 Simine Marketing  
 Simine Hall  
 Clemson, SC 29634-1325  
 United States

Delivery Options: Expedite  
 Ship Via: Best Carrier-Best Way  
 Req Delivery

**Billing**

Bill To: Attn: NANCY J ROCHESTER  
 P/Rm/Ste: 245 Simine Marketing  
 Simine Hall  
 Clemson, SC 29634-1325  
 United States

Billing Options: Accounting Date

**Accounting Codes**

ACCOUNT	FUND	DEPT	PROGRAM	CLASS	PROJECT
6030 Student Travel	15 CU - State - E and G	1325 Marketing	101 Instr: General Academic-Degre	130 SC App E and G and Dept Revenue	1513030 885 Major Fees

**Internal Notes and Attachments**

Internal Note: Note to all suppliers  
 Internal attachments: Attachments for all suppliers  
 add attachment...

**Supplier / Line Item Details**

BPC Hotel LLC  
 Fulfillment Address 1: 102 North End Avenue, Embassy Suites Hotel, New York, NY 10282 US

Contract Number: To Be Assigned  
 PO Number: To Be Assigned

# Line Item Rejection

## Line Item Rejection

- After rejection is complete, a message will be sent to the shopper informing him/her that the requisition has been rejected (only if the email preference has been turned on in that user's profile)

## Place a check mark in the line(s) that are being rejected

## Click GO – this rejects the line item

Supplier / Line Item Details

Hide line details

For selected line items:

**International Field Studies** [more info...](#)

Contract Number: no value  
PO Number: To Be Assigned  
[View/edit by line item...](#)

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>
1 <a href="#">GEOL 375 Bahamian Field Study Course</a> <a href="#">more info...</a>			13,530.00	1	13,530.00 USD	<input checked="" type="checkbox"/>	<input type="button" value="edit"/>

[view/edit](#)

Taxable	<input checked="" type="checkbox"/>	Internal Note/Funding Information	no note
Capital Expense	<input checked="" type="checkbox"/>	Internal attachments	add attachment...
Commodity Code	82880	External Note	no note
R&D Tax Exempt (50% or more of item usage will be for Research and Development)	<input checked="" type="checkbox"/>	Attachments for supplier	add attachment...
External Billing	<input checked="" type="checkbox"/>	PO Clauses	edit clauses...
Exemption Number	no value		no clause

Supplier subtotal 13,530.00

- ❑ Click GO at the top of the PR where Approve/Complete Step is displayed – this completes the rejection and approval step (use the scroll bar to scroll to the top of the requisition)

Available Actions:

General	Shipping	Bill To	Billing
<b>Status</b> Pending Department Approval (Penni Douglas)	<b>Ship To</b> Attn: NANCY J ROCHESTER Fl/Rm/Ste: 245 SIRRINE Marketing SIRRINE HALL CLEMSON, SC 29634-1325 UNITED STATES	<b>Bill To</b> Attn: NANCY J ROCHESTER Fl/Rm/Ste: 245 SIRRINE Marketing SIRRINE HALL CLEMSON, SC 29634-1325 UNITED STATES	<b>Billing Options</b> Accounting Date <i>no value</i>
<b>Submitted</b> 3/3/2009 3:15 PM	<b>Delivery Options</b> Expedite <span style="color: red;">x</span>		
<b>Cart Name</b> 2009-03-03 kari 01			
<b>Description</b> <i>no value</i>			
<b>Priority</b> Normal			
<b>Prepared by</b> NANCY J ROCHESTER			

## Return Requisition to Requisitioner

- A requisition can be returned to the Requisitioner for various reasons, including fixing incorrect accounting codes, adding attachments or updating line details. The Requisitioner can then edit this returned requisition and “resubmit” the requisition for approval from the beginning of the workflow. All previous document history and notes including the PR number will be preserved.

The screenshot displays the 'Summary - Requisition 337098' page. The 'Available Actions' dropdown menu is open, showing the following options:

- Return to Requisitioner (highlighted)
- Approve/Complete Step
- Return to Shared Folder
- Place PR on Hold
- Return to Requisitioner
- Forward to ...
- Add Comment
- Add Notes to History
- Copy to New Cart

The main content area is divided into several sections:

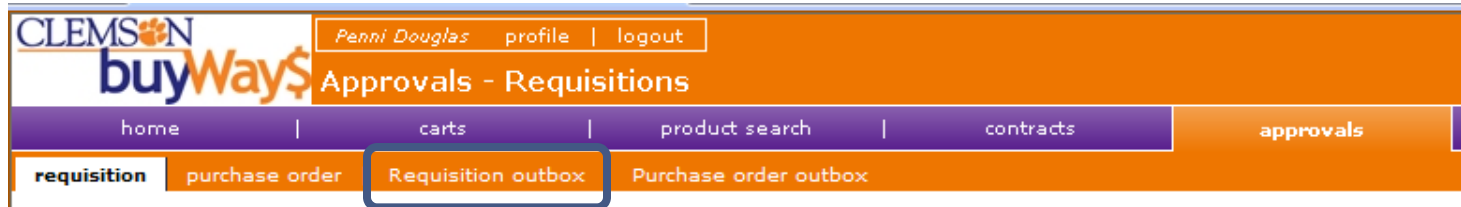
- General:** Buyer (no value), Buyer Phone (no value), Status (Pending), Submitted (9/30/2009 9:29 PM), Cart Name (2009-09-30 penni 02), Description (no value), Priority (Normal), Requisitioner (Penni Douglas), Contact Phone Number (864-656-5582), Out to Bid (X).
- Shipping:** Ship To (Attn: Penni Douglas, FI/Rm/Ste: FI/Rm/Ste: Dir Reg & Pub Serv Prog, CU: Dir Reg/Pub Serv Prog, 511 Westinghouse Road, Pendleton, SC 29670, United States), Delivery Options (Normal), Expedite (X), Ship Via (Best Carrier-Best Way), Requested Delivery Date (no value).
- Billing:** Bill To (Attn: Penni Douglas, FI/Rm/Ste: FI/Rm/Ste: Procurement Svcs, Administrative Svcs Bldg, 108 Silas N. Pearman Blvd, Clemson, SC 29634-5365, United States), Billing Options (Accounting Date: no value).
- Accounting Codes:** Table with columns: Account, Fund, Dept, Program, Class, Project.

These actions are available once you assign the requisition to yourself. For multiple line items, place a check mark in the lines that you want to reject

- Return to Requisitioner – allows for comments to be made and returned to the requisitioner for additional information and resubmission
- Place PR on Hold – allows the req to be placed on hold until more information is available
- Forward to... - the will forward the requisition to another approver. This action will not approve the requisition
- Add Comment – allows more information to be documented
- Add notes to history – allows more information to be documented
- Reject Requisition – rejects the entire requisition
- Reject Line – rejects only the lines selected

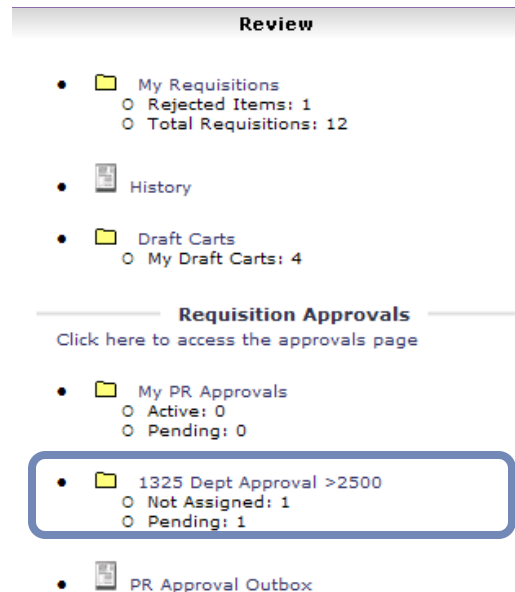
# Approval Outbox & Review

- ❑ **Requisition Outbox** – click this box to view PRs that you have approved or rejected/completed



## ❑ Review

- Use the **Review** section on the buyWays home page to view PRs that are pending your approval





## □ Email preferences (located in [my profile](#))

- The email preferences below have already been set up for you. An email will be sent to you letting you know that a PR is pending your approval

User Settings			
Purchasing	Permissions	Supplier Mgt	History
User Identification	Personal Settings	Roles	Document Access
Email Preferences			Navigation Setup
Email Preference	Value	Override	Role
<b>Administration &amp; Integration</b>			
Search Result Export Confirmation	x	<input type="checkbox"/>	
Requisition Export Failure Notification	x	<input type="checkbox"/>	
Invoice Export failure notification	x	<input type="checkbox"/>	
<b>Shopping, Carts &amp; Requisitions</b>			
Prepared By - Cart Assigned Notice	x	<input type="checkbox"/>	
Prepared By - PR line item(s) rejected	x	<input type="checkbox"/>	
Prepared By - PR rejected/returned	x	<input type="checkbox"/>	
Cart Assigned Notice	x	<input type="checkbox"/>	
Receive Req. and PO notifications for Carts Assigned to Me	x	<input type="checkbox"/>	
Assigned Cart Processed Notification	✓	<input type="checkbox"/>	
Assigned Cart Deleted Notification	x	<input type="checkbox"/>	
Requisition submitted into Workflow	x	<input type="checkbox"/>	
Requisition pending Workflow approval	✓	<input type="checkbox"/>	
Requisition Workflow Notification available	✓	<input type="checkbox"/>	
Requisition Workflow complete / PO created	x	<input type="checkbox"/>	
Requisition line item(s) rejected	✓	<input type="checkbox"/>	
Requisition rejected/returned	✓	<input type="checkbox"/>	

## buyWays online information located:

- <http://www.clemson.edu/cfo/procurement/buyWays/index.html>

## Sign up for buyWays Bullets:

- You can sign up to receive this publication in your email by:
  - Sending an email with no subject to [listserv@clemson.edu](mailto:listserv@clemson.edu) with the following content in the body of the message:

Subscribe buyWays-L

Your Name

## buyWays support:

- Email: [cubuyways@clemson.edu](mailto:cubuyways@clemson.edu)
- Phone calls: buyWays help desk @ 656-5581