buyWays Approver Training

For all approvers
Session Overview

- 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](http://www.clemson.edu/cfo/procurement/buyWays/training.html)

- Contact:
  - Penni Douglas penni@clemson.edu or call 864-656-5582
  - buyWays Help Desk 864-656-5581 or cubuyWays@clemson.edu
Approval via Email

- 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
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

Dear Penni Douglas,

The requisition listed below has been submitted for your approval.

**Summary**

- Approval Folder: 5365 Department Approval
- Requisitioner: Penni Douglas
- Shopper: Allison Paton
- Cart Name: 2011-07-20 Jonkin 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 tbl, Inside Length 1-3/4 in
  - Catalog Number: 9949743
  - Quantity: 4
  - Unit Price: 13.40 USD
  - Ext. Price: 13.40 USD
  - Size/ Packaging: EA
  - Taxable: Yes
  - Capital Expense: No
  - Commodity Code: (50% or more of item usage will be for Research and Development)
  - Exemption Number: (50% or more of item usage will be for Research and Development)

- TOTAL: 14.34 USD

**Accounting Codes**

- Account: 7201 - Supplies Office
- Fund: 15 - CO - State & E and G
- Dept: 5365 - Procurement Services
- Program: 630 - Fiscal Operations
- Class: 120 - SC App EQ and Dep't Revenues
- Project: 1500000 - Departmental Default

**Additional Information**

- Summary Details
  - Buyer: (No Contact Phone Number)
  - Comments: (0)

- Other Possible Approvers
  - Scott Pippen
  - Michael Nebesky

- Shipping Address
  - Address: 108 Silas N. Pearman Blvd
  - Clemson, SC 29634-3305
  - 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:
- (803) 656-5502
- supplierways@clemson.edu

Thank you,
Clemson buyWay$
Email Approval Steps

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

Click OK

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 drop-down menu
- Click GO The PR is now approved
Approval Extended View

- Click on the Approvals Tab
- Click the word Assign

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 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.
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
Approval Steps

- 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)
Other Approver Actions

- 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.
Other Approval Actions

- 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

- 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.

![Image of email preferences settings](image.png)
buyWays Support and Reference Materials

- 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 with the following content in the body of the message:
      - Subscribe buyWays-L
      - Your Name

- buyWays support:
  - Email: cubuyways@clemson.edu
  - Phone calls: buyWays help desk @ 656-5581