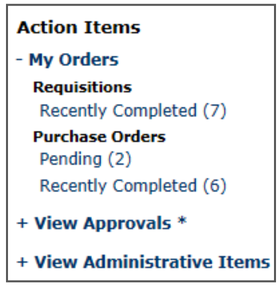
Approver Quick Reference Guide

Logging In
• Using the Purchasing home page click on the USU EZBUY link.
• On the left side of the USU EZBUY homepage, review Bulletin Board information for new announcements or training materials.

Reviewing Your Profile
1. Click the profile link located in the left corner of the page. Some fields are view only and can only be updated from PeopleSoft.
2. Click the User Settings tab. Review/edit Email Preferences.
4. Click the Save button.

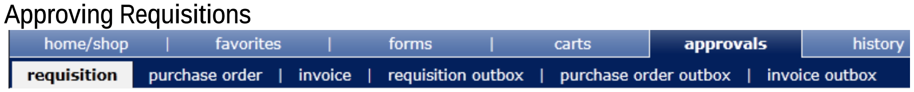


Reviewing Action Items
• On the left side of the USU EZBUY homepage, review the Action Items (work list) for updates regarding requisitions, purchase orders or invoices.

Viewing Requisition Approvals
1. Locate the requisition you wish to view through history PR History.
2. Click the Search click on the requisition number to open the requisition.
3. Click the PR Approvals tab to view the approval path.
4. Click the view approvers link to view the responsible approvers.

Assigning Requisitions or Invoices to Yourself
1. Click approvals on the navigation bar or + View Approvals/Assigned Carts ⇨Requisitions or Invoices from your Action Items. Locate the requisition or invoice you wish to assign.
2. Assign the requisition or invoice to yourself by clicking the Assign button in the Action column (if the requisition or invoice is not in your My PR/Invoice Approvals folder).

Returning Requisitions and Invoices to Shared Folders
1. Navigate to your My PR Approvals or My Invoice Approvals folder.
2. Locate the requisition or invoice you want to return to the shared folder.
3. Click the Select ☑ checkbox.
4. Select Return to Shared folder from the Available Actions list.
5. Click the Go button.

Approving Requisitions


1. Click approvals ⇨requisition on the navigation bar or + View Approvals/Assigned Carts ⇨Requisitions from your Action Items.
2. Assign the requisition to yourself (if the requisition is not in your My PR Approvals folder).
3. Click the requisition number to open the requisition.
4. Review the requisition for accuracy and compliance.
5. Select Approve/Complete Step in the Available Actions list.
6. Click the Go button.

Rejecting Requisitions
1. Click approvals on the navigation bar or + View Approvals/Assigned Carts ⇨ Requisitions from your Actions Items.
2. Assign the requisition to yourself (if the requisition is not in your My PR Approvals folder).
3. Click the requisition number to open the requisition.
4. Review the requisition for accuracy and compliance.
5. Select Reject Requisition from the Available Actions list. Click the Go button.
6. Enter a reject reason. Click the Reject Requisition button.

Returning Requisitions
1. Click approvals on the navigation bar or + View Approvals/Assigned Carts ⇨ Requisitions from your Action Items.
2. Assign the requisition to yourself (if the requisition is not in your My PR Approvals folder).
3. Click the requisition number to open the requisition.
4. Review the requisition for accuracy and compliance.
5. Select Return Requisition from the Available Actions list. Click the Go button.
6. Enter a return reason. Click the Return to Requisitioner button.

Sending Comments without Returning the Requisition or Invoice
1. Click approvals ⇨ requisitions or invoices on the navigation bar.
2. Click on the requisition or voucher number to open the transaction.
3. Click the Comments tab and then the Add Comment button.
4. Enter your comments. Check the ☑ Email notification(s) box next to the appropriate user name or search to add a user.
5. Click the Add Comment button.

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Adding Requisition Notes and Attachments

- **Internal Notes and Attachments** and **External Notes and Attachments** may be added to the requisition during the approval process.
- Attachments <u>cannot</u> be added directly to documents once they have completed workflow.
- All attached documentation will remain with the requisition and purchase order indefinitely.
- Documentation is visible to all approvers of the requisition.
- Some suppliers have the ability to accept external notes and attachments with a purchase order. These are typically suppliers who are receiving the purchase order via fax or email.
- Few electronically integrated suppliers have the ability to accept external notes and attachments. Notifications will indicate if notes and attachments are accepted.

1. Click **approvals** on the navigation bar or **+ View Approvals/Assigned Carts** ⇨ **Requisitions** from your Action Items.
2. Assign the requisition to yourself.
3. Click the **requisition number** to open the requisition.
4. Click the **Requisition Summary** tab.
5. Click the **add attachment...** link. Add file or URL. Click the **Save** button.

Assigning Substitute Approvers

1. Click **approvals** ⇨ **requisitions** or **invoices** on the navigation bar.
2. Determine which folder(s) you would like to set up a substitute approver for and follow the directions below for EACH folder.
3. Click the **Assign Substitute** link.
4. **Search** for substitute approver.
5. Click the **Choose Selected User** button.

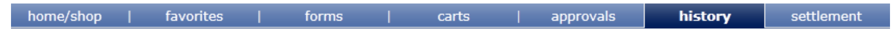
Removing Substitute Approvers

1. Click **approvals** ⇨ **requisitions** or **invoices** on the navigation bar.
2. Determine the folder(s) where you would like to remove the substitute approver and follow the directions below for EACH folder.
3. Click the **End Substitute** link.

Creating and Distributing Purchase Orders

- Upon completion of the approval process, the **Purchase Order Number** is generated and the purchase order is automatically distributed to the supplier via the supplier's preferred method.
- Some forms will <u>not</u> dispatch an order to the supplier, such as the After the Fact and Payment Voucher forms.
- Suppliers are provided with the requesters contact information, as entered in the **profile**, and will contact the requester directly with questions or concerns.

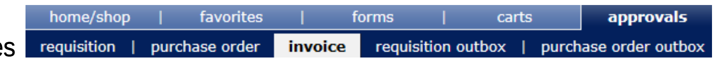
Requisition and Purchase Order History



All requisitions and purchase orders are <u>permanently</u> stored within USU EZBUY.

1. Select **history/reports** on the navigation bar to search for requisitions or purchase orders.
2. Select one of the following tabs: **PO history** | **requisition history** | **my requisitions**| **my purchase orders**
3. Click the Req or PO number to view document summary, detail, and approval history.

Approving Invoices

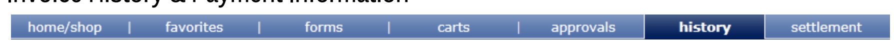


1. Click **approvals** ⇨ **invoice** on the navigation bar or **+ View Approvals/Assigned Carts** ⇨ **Invoices** from your Action Items.
2. Assign the invoice to yourself by clicking the **Assign** button in the Action column (if the invoice is <u>not</u> in your My Invoice Approvals folder).
3. Click the **voucher number** to open the invoice.
4. **Review** the invoice for accuracy and compliance.
5. Select **Approve/Complete Step** in the Available Actions list.
6. Click the **Go** button.

Placing Invoices on Hold

1. Click **approvals** ⇨ **invoice** on the navigation bar or **+ View Approvals/Assigned Carts** ⇨ **Invoices** from your Action Items.
2. Assign the invoice to yourself by clicking the **Assign** button in the Action column (if the invoice is <u>not</u> in your My Invoice Approvals folder).
3. Click the **invoice** to open the invoice.
4. **Review** the invoice for accuracy and compliance.
5. Select **Place Invoice on Hold** in the Available Action list.
6. Enter **comments**. Click the **Place Invoice on Hold** button.
7. Click the **Go** button.

Invoice History & Payment Information



All invoices are <u>permanently</u> stored within USU EZBUY.

1. Select **history** on the navigation bar to search for invoices.
2. Select the **invoice history** tab.
3. Search by **invoice** or **PO**.
4. Click the **Search** button.
5. Click the **invoice number** to view summary, detail, and approval history.
6. Click the **Summary** tab to view.