buyWays Approver Training
2014 Layout
Session Overview

- This training document details the following approval tasks
  - Approval workflow steps
  - 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
  - Notifications
  - Action Items
  - User Profile Setup / Email Preferences
  - Assign Substitute Approver

- Refer to the buyWays Training web page for additional training materials:
  http://www.clemson.edu/finance/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 Workflow Steps

**Requisition Approval Workflow Steps**

Based on the characteristics of the requisition (amount, types of purchases and form type), the workflow is programmed to obtain appropriate approvals based on the criteria noted below. Note: The majority of your requisitions will have a limited number of approval steps.

<table>
<thead>
<tr>
<th>Approval Step</th>
<th>Activated by</th>
<th>Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto approval</td>
<td>$ limit set by department</td>
<td>Requisitioner (upon submit)</td>
</tr>
<tr>
<td>Department</td>
<td>$ limit set by department</td>
<td>Department approver</td>
</tr>
<tr>
<td>Project</td>
<td>$ limit set by department</td>
<td>Project approver</td>
</tr>
<tr>
<td>Project Coordinator</td>
<td>$ limit set by business office</td>
<td>Grants coordinator</td>
</tr>
<tr>
<td>SPAA</td>
<td>If fund 20 &amp; accounting code = 7004, 7005 or 8xxx</td>
<td>Grants and Contracts</td>
</tr>
<tr>
<td>Form approvals</td>
<td><strong>Dependent on the form</strong></td>
<td></td>
</tr>
<tr>
<td>Director of Procurement</td>
<td>Sole source, vehicle or trade-in</td>
<td>Mike Nebesky</td>
</tr>
<tr>
<td>Purchasing Gatekeeper</td>
<td>&gt;, = $2500 &amp; not on contract</td>
<td>Mike Nebesky or Shirley Alexander</td>
</tr>
<tr>
<td>Purchasing Agent Review</td>
<td>&gt;, = $2500 &amp; not on contract that requires bidding</td>
<td>Buyer in Purchasing</td>
</tr>
<tr>
<td>Comptroller</td>
<td>Sole Source</td>
<td>Charles Tegen</td>
</tr>
</tbody>
</table>

### Notifications

**Do not stop the approval process**

<table>
<thead>
<tr>
<th>Category</th>
<th>Criteria</th>
<th>Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hardware/Software</td>
<td>Hardware or software purchase &gt;, = $2500</td>
<td>CCIT</td>
</tr>
<tr>
<td>EH&amp;S</td>
<td>Controlled substance, recycled, hazardous, radioactive, rad-minor, select agent, toxin, energy star &amp; green</td>
<td>EH&amp;S</td>
</tr>
<tr>
<td>Equipment Inventory</td>
<td>Accounting code= 8xxx and &gt;, = $5000</td>
<td>Property Control</td>
</tr>
</tbody>
</table>
Approval via Email

- Approval Code Set Up
  - Your personal approval code must be set up first, 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 on your name, then, View My Profile.
  - Under User Information and Settings, click on User’s Name, Phone Number, Email, etc.
  - Enter your personal Email approval code.
    - It is recommended that your approval code match your Novel password.
    - Must be a minimum of 4 characters.
  - Click Save.
  - See screenshots on the next panel.
Email Approval Code Set Up
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.

- See screenshot on the next two panels.
Approval via Email – Sample

Project Catch-all Approval Request for Requisition# 46389641

Dear Sherry Williams,

The requisition listed below has been submitted for your approval.

Summary

<table>
<thead>
<tr>
<th>Approval Folder</th>
<th>Project Catch-all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisitioner</td>
<td>Robin Wilmott</td>
</tr>
<tr>
<td>Cart Name</td>
<td>2014-01-07 SunEthan</td>
</tr>
<tr>
<td>Requisition No.</td>
<td>46389641</td>
</tr>
<tr>
<td>Priority</td>
<td>Normal</td>
</tr>
<tr>
<td>No. of line items</td>
<td>1</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>130.71 USD</td>
</tr>
</tbody>
</table>

Details

VWR International

Item 1

<table>
<thead>
<tr>
<th>Description</th>
<th>THIONYL CHLORIDE 99+% 500G</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Number</td>
<td>A4441868-35</td>
</tr>
<tr>
<td>Quantity</td>
<td>1</td>
</tr>
<tr>
<td>Unit Price</td>
<td>122.16 USD</td>
</tr>
<tr>
<td>Ext. Price</td>
<td>122.16 USD</td>
</tr>
<tr>
<td>Contract Number</td>
<td>5000012264 (NASPO Master Agreement-Laboratory Equipment-Chemicals and Supplies To Include Microscopes and Parts)</td>
</tr>
<tr>
<td>Size/Packaging</td>
<td>EA</td>
</tr>
<tr>
<td>Taxable</td>
<td>Yes</td>
</tr>
<tr>
<td>Capital Expense</td>
<td>No</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>11530</td>
</tr>
<tr>
<td>R&amp;D Exempt-check</td>
<td>No</td>
</tr>
<tr>
<td>this box if purchase</td>
<td></td>
</tr>
</tbody>
</table>

New Pending Approval for Requisition# 46389641

cubuyways@clemson.edu
Sent: Tue 1/7/2014 1:57 PM
To: Sherry Williams

Accounting Codes

<table>
<thead>
<tr>
<th>Account</th>
<th>7202 - Supplies:Scientific/Technical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund</td>
<td>20 - CU - Sponsored Research Activities</td>
</tr>
<tr>
<td>Dept</td>
<td>0073 - Chemistry</td>
</tr>
<tr>
<td>Program</td>
<td>201 - Research: Non-PSA</td>
</tr>
<tr>
<td>Class</td>
<td>223 - Fed/SC Via State Agencies</td>
</tr>
<tr>
<td>Project</td>
<td>2096966 - GRA Toward a Career on Advanc</td>
</tr>
</tbody>
</table>

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

Additional Information

Summary Details

Delivery County: PICKENS - PICKENS
Buyer: PICKENS
Buyer Phone: +1 (864) 656-3128
Contact Phone: +1 (864) 656-3128
Number: 0
Out to Bid: No
Comments: (0)

Other Possible Approvers

Penni Douglas

Shipping Address

Attn: SunEthan
P.O. Box: 235
Chemistry
HL Hunter Lab
211 South Palmmeto Blvd
Clemson, SC 29634-0973
United States
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 Action Items
- Click on Requisitions to Approve
- Click on folder to see all items in the folder
- Click Approve
Approval Extended View

- Click on the Orders & Documents Icon
- Click on Approvals, then, My Approvals
- Click on folder to see all items in the folder
- Click on requisition number to review entire requisition
- Click on Assign
Assigning the Requisition to Yourself

- The PR has moved from the shared folder to the My Requisition Approvals folder. By assigning a requisition to yourself, it allows other users to see that the PR is assigned to an approver.
  - Click on the quick view icon next to the PR number to view more detail on the PR.
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, from the Available Actions, choose Approve/Complete Step, or Approve/Complete & Show Next, click Go, the PR is approved.
Line Item Rejection

- Place a check mark out to the right of the line(s) that are being rejected
- Click GO at the drop down For Selected Line Items– this rejects the line item
  - 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)
Approval Steps

- Click GO at the top of the PR where Available Actions Approve/Complete Step is displayed – this completes the rejection and approval step (use the scroll bar to scroll to the top of the requisition)
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.
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 requisition number will be preserved.
Notifications and Action Items

- **Notifications** – click this link in the top banner to view PRs that you have approved, rejected, or completed.

- **Action Items** – Click this link in the top banner to view PRs that are pending your approval and other tasks that require action on your part.
Email Preferences

- **Email preferences** (located in my profile) The email preferences below have already been set up for you, based on your role(s). An email will be sent to you letting you know that a PR is pending your approval and a notification will be added in the top banner.
Assign Substitute Approver

- Click on Orders & Documents icon
- Click on Approvals
- Click on Assign Substitute Approvers
- Click on Assign (next to the approval that you want to modify)
- When the box opens, you can select the date range for the substitution
- Type the person’s name (they must currently have the approval role)
- Click Assign
buyWays Support and Reference Materials

- buyWays online information located:
  - [http://www.clemson.edu/cfo/procurement/buyWays/index.html](http://www.clemson.edu/cfo/procurement/buyWays/index.html)

- buyWays support:
  - Email: cubuyways@clemson.edu
  - Phone calls: buyWays help desk @ 656-5581
Information, History and Exports

- Tracking your requisition or PO
  - Orders & Documents, Document Search, Search Documents – simple search or advanced search
    - My requisitions
    - My purchase orders
    - My Invoices

- Reporting/inquiries on your history
  - Orders & Documents, Document Search, Search Documents
    - All Records
    - PO history
    - Requisition history
    - Receipt history
    - Invoice history

Refer to the **Quick Reference Guide for Reporting** available in the training section of the buyWays Information Portal:

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