## *Ad Hoc Approval Concepts*

There are three types of Approval:

- BearBuy provides three options for "user-defined" Approvals for Requisitions—these are in addition to any required approvals generated by BearBuy such as the Procurement Dept Code approval.

- When the Shopper creates a Cart, or the Requester edits the Cart, they can specify individuals as a *Requisition Pre-Approver*, and up to two additional *Ad Hoc Approvers* (Requisition Approvers *cannot* add optional approvers).
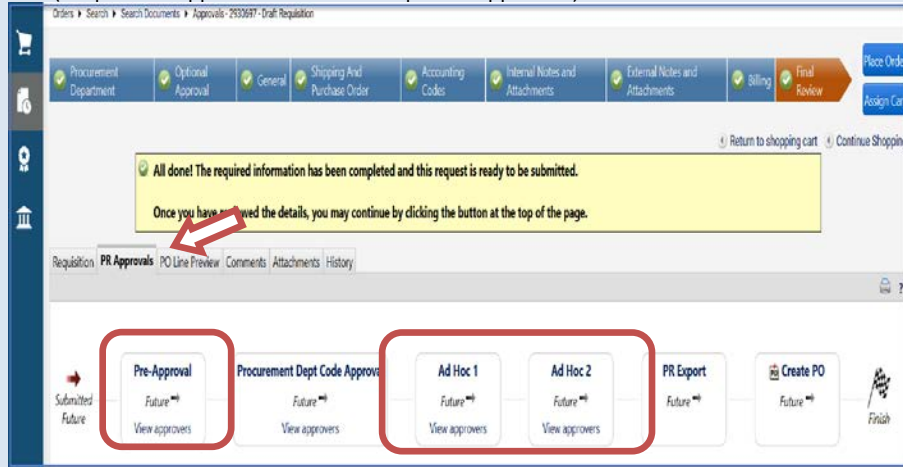
- **Requisition Pre-Approver**
  - The Requisition Pre-Approver reviews the order according to the department's internal business approval process.
  - This Approver is *optional and only added as needed* – an approval occurs *before* the Requisition Approver or Ad Hoc Approvers, if any.

- **Ad Hoc Approver 1 or 2**
  - The Ad Hoc Approver reviews the order according to the department's internal business approval process.
  - The Ad Hoc Approver is *optional and only added as needed* - approval occurs *after* Procurement Dept Code approval step.

- **Best Practice recommendations:** Departments may instruct Shoppers or Requesters to specify Ad-Hoc Approver(s) for split funds or specific type of purchases.

Reviewing Action Items
- Click the **Action Items flag** at the top of BearBuy for items pending your review.
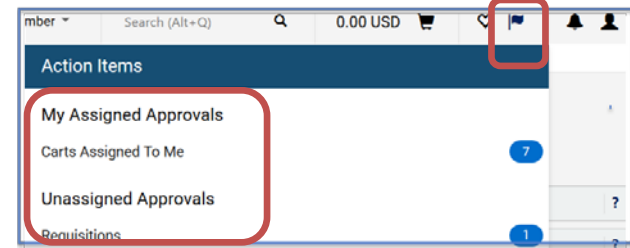
- **Requisitions To Approve** (under **My Assigned Approvals**), shows the number of requisitions currently assigned to you. These requisitions are pending your approval.
- **Requisitions** (under **Unassigned Approvals**), shows the number of pending requisitions not assigned to an approver.
- Clicking the links will take you to your **My Approvals - Requisitions folders**, which list pending requisitions.
  a. The **Requisitions To Approve** link will take you to view only requisitions assigned to you.
  b. The **Requisitions** link (under **Unassigned Approvals**) will take you to view only unassigned requisitions.

Review Notifications
- Besides the **Action Items flag**, another way to access items pending your review is through **Notifications**.


1. Click on the **Notifications bell icon** at the top of the BearBuy page.
2. Click on an item from the list. This will navigate you to the requisition pending approval.
3. To see all notifications, click the **more notifications…** link at the bottom of the window.
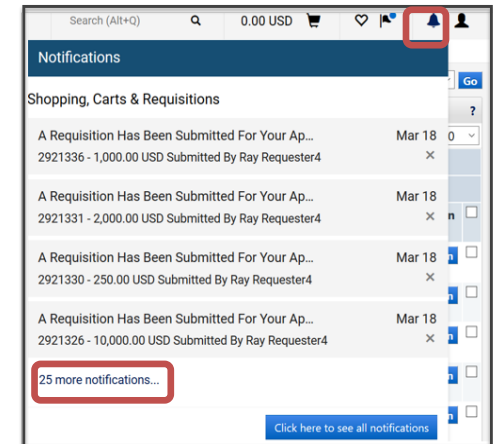
My Approvals - Requisitions List
- Requisitions requiring review appear on the **My Approvals - Requisitions** list.
- The **My Approvals - Requisitions** list can be accessed through the **Action Items flag** or through **Orders** > Approvals > Requisitions to Approve > My Approvals-Requisitions.
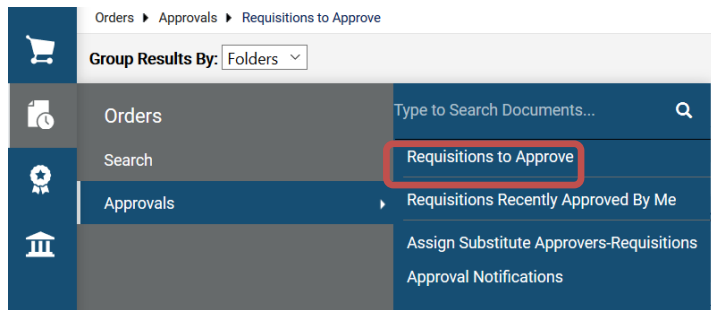
▸ The My PR Approvals list consists of two main sections, approval folders containing requisitions on the right and a filter panel on the left.

Filters Panel: Filters & Refinement Options

Approval Folders with Pending Requisitions: My PR Approvals folder and Shared Approval Folders

My PR Approval Folders
▸ Approval folders list requisitions pending review.
▸ Each Approval Folder is indicated by the 📁 icon followed by the name of the folder and a count of pending requisitions in the folder.
▸ Requisitions are displayed with key information about each requisition such as suppliers, amounts, Shopper/Requester who submitted the requisition, etc.
▸ Aging information showing the specific number of days the requisition has been pending in an approval folder is also listed for each requisition.


Filtering the My PR Approvals List
▸ The Filter My Approvals section of the filter panel provides several filters to view only desired requisitions.
▸ The options include filtering by a Date Range, approval folders, Requester, custom fields, and more.
1. Under Filter My Approvals in the left filter panel, click the filter links one at a time or select a value from the Date Range dropdown.

   a. To select multiple values from each filter section, click the 🔽 icon.
   b. Selecting the Custom Fields such as Procurement Dept Code or Fund values will filter the My PR Approvals list to show only requisitions with those values.
2. Once a filter value is applied, the value appears in the Filtered By section of the filter panel.
3. To stop applying a filter value individually, uncheck the checkbox beside the filter value in the Filtered By section.
   a. To stop applying all filter values that have been applied, click the [remove all] link.
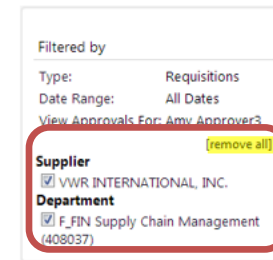
▸ The entire filter panel can be collapsed and hidden to the left side of the screen if you would like to have a wider view of only the approval folders.
1. Click the vertical grey bar separating the filters panel from the approval folders to hide and expand the filter panel.

Sorting the My PR Approvals List
▸ By default, requisitions are sorted in the My PR Approvals list by the Submit date newest first. However, you may want to sort all requisitions by other available criteria to bring important requisitions to the top of the My PR Approvals list.
1. Click the Sort by dropdown menu above the approval folders.

2. Select an option to sort by such as the Total high to low option to see all high value requisitions at the top of the My PR Approvals list.

Sort by: Total high to low
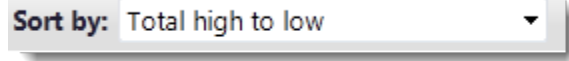
My PR Approvals Folder & List Views
▶ Approvers can view the My PR Approvals list with requisitions separated by folders or shown in one list of requisitions. By default the My PR Approvals list is shown in Folder view.
1. On the My PR Approvals list page, navigate to the Group results by dropdown menu in the upper left hand corner.
2. Choose Folders to view requisitions grouped by folder.
   a. This view is recommended for most Approvers. **Group Results By:** Folders
3. Alternatively, choose List from the dropdown to view requisitions in a single listing.
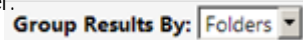
Collapse & Expand Approval Folders
▶ All approval folders can be collapsed so only the folder heading is visible.
1. Click the collapse all link at the top of the My PR Approvals list to collapse all approval folders.
   a. Each approval folder can be collapsed individually by clicking on the specific approval folder ▲ 📁 icons or approval folder name.
2. To expand all approval folders and show all requisitions pending in all approval folders, use the expand all link at the top of the My PR Approvals list.
   a. Expand a collapsed approval folder individually by clicking on the specific approval folder ▷ 📁 icons or approval folder name.

Show or Hide Requisition Details
▶ Approvers can see additional requisition details in the My PR Approvals list such as requisition name, the number of line items, aging information, etc.
1. On the My PR Approvals list page, click the Show requisition details link above all the approval folders.
   a. This is the default setting.
▶ Approvers can see fewer requisition details, a setting which displays basic information such as the requisition number, suppliers, assigned approver, etc.
1. On the My PR Approvals list page, click the Hide requisition details link above all the approval folders.
   a. This setting reduces the information displayed, making the requisition listing shorter.

### Number of Requisitions per Page
▶ You can set the maximum number of requisitions that appear in approval folders at one time.
1. On the My PR Approvals list, navigate to the Results per folder dropdown in the upper right of the My PR Approvals list page, above all the approval folders.

2. Change the value to how many requisitions you would like to view. This setting applies to all approval folders.

Results per folder: 20
10
20
30
40
50
100
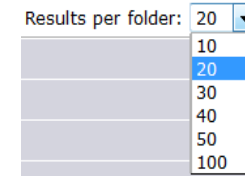
▶ When the Results per folder is set to a low value and there are many requisitions in the approval folders, the Approver will need to navigate to the next page to view all requisitions in the approval folder.
1. To navigate between pages, use the page arrows or dropdown found in the far right hand side of each approval folder heading.

◀ Page 1 ▼ of 5 ▶
1
2
3
4
5
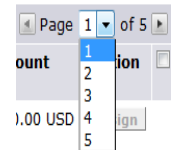
Requisition Approval

Assign a Requisition to Yourself
1. Go to Action Items 🚩 or 🗂 Orders > Approvals > Requisitions to Approve.
2. Requisitions for Ad Hoc approval will be in their own approval folder, separate from any other approval Folders you may be assigned to as an Approver.

Ad Hoc Approver 1: amy_approver1 (Amy Approver1): (All Values) [2 results]						
Requisition No.	**Suppliers:**	**Assigned Approver**	**PR Date/Time**	**Requisitioner**	**Amount**	**Action**
🔁 2814223 📄	LIFE SCIENCE PRODUCTS, INC	Not Assigned	11/6/2019 11:24 AM	Sam Shopper5	578.00 USD	Assign
Requisition Name	2019-11-05 ray_requester5 01		📁 Folders	0 Days in folder [Ad Hoc Approver 1: amy_approver1 (Amy Approver1): (All Values)]		
No. of line items	1					

3. Locate the requisition you wish to assign.
4. Assign the requisition to yourself by clicking the Assign button in the Action column.
   a. The requisition now appears in the My PR Approvals folder to indicate that the requisition is assigned to you.

Return a Requisition to the Shared Approval Folders
▶ Returning a requisition to the Shared approval folder un-assigns the requisition from you and allows other Requisition Approvers with access to the approval folder to review the requisition.
1. Navigate to your My PR Approvals folder.
2. Locate the requisition you want to return to the shared folder.
3. Click the Select ☑ checkbox in far right of the requisition listing.
4. Select Return to Shared folder from the dropdown list above the approval folders.
5. Click the Go button.

Approve a Requisition

> Before approving a Requisition, **carefully review and confirm the accuracy** of all information in the order including the **Procurement Dept Code, Accounting Codes, and the Ship-To Address**.

1. Go to **Action Items** [flag icon] or [icon] **Orders > Approvals > Requisitions to Approve**.
2. Assign the requisition to yourself (if the requisition is <u>not</u> already in your **My PR Approvals** folder).

3. Click the **Requisition No**. to open the requisition.
4. **Review** the requisition for accuracy and compliance.
5. Select **Approve/Complete Step** in the Available Actions list. Click the **Go** button.
   a. You also have an **Approve/Complete Step & Show Next** option in your Available Actions list.
   b. Using this option allows you to approve a requisition then move immediately to the next requisition in your Approval Folder for review.
   c. This option approves the document in the same manner as **Approve/Complete Step**.

Communicate Requisition Comments

> Approvers can add a pertinent comment to a pending requisition. The comment can be text and can include a document. Any comments made by Approvers are internal only, and are not shown on the Purchase Order.

1. On the My PR Approvals list page, click on the requisition number to open the transaction.
2. Click the **Comments** tab and then the **Add Comment** button.
3. Enter your comments. If you would like to notify a BearBuy user of your comments, check the ☑ **Email notification(s)** box next to the appropriate user name or search to add a user.
4. Attach a document or file as needed.
5. Click the **Add Comment** button.

Return a Requisition

> Returning a Requisition means that you are sending the requisition back to the department Requester for review or re-work. Your comments when returning are important.

1. Go to **Action Items** [flag icon] or [icon] **Orders > Approvals > Requisitions to Approve**..
2. Assign the requisition to yourself (if the requisition is <u>not</u> in your My PR Approvals folder).
3. Click the **Requisition No**. to open the requisition.
4. **Review** the requisition for accuracy and compliance.
5. Select **Return to Requester** from the Available Actions list.
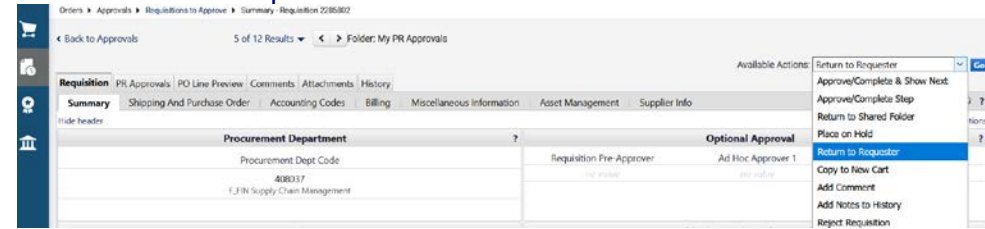
6. Click the **Go** button.
7. Enter a **return reason**.
8. Click the **Return to Requester** button. [Return to Requester button]

Reject a Requisition

> Carefully consider if **Rejecting** is necessary, or if **returning** the Requisition may be more appropriate.

> Rejecting <u>permanently</u> rejects the requisition and must be recreated or copied in order to be re-submitted for approval.

1. Go to **Action Items** [flag icon] or [icon] **Orders > Approvals > Requisitions to Approve**.
2. Assign the requisition to yourself (if the requisition is <u>not</u> in your My PR Approvals folder).
3. Click the **Requisition No**. 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 **PR Reject Reason**.
7. Click the **Reject Requisition** button. [Reject Requisition button]
8. The requisition is now rejected, and the owner of the order will be notified. The Reject Reason has also been recorded in the comments for the requisition.

Navigating between Requisitions within an Approval Folder
▶ When viewing a requisition from your My PR Approvals list, you can navigate to other requisitions within an approval folder without returning to the My PR Approvals list.
1. From your My PR Approvals list, click on a requisition number in an approval folder.
2. Text and buttons appear at the top of the requisition.
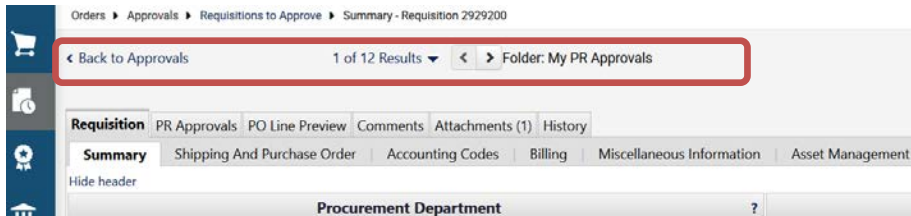
   a. The number of requisitions in the approval folder displays. Click the arrows next to the numbers and navigate to the previous or next requisition in the approval folder.
   b. The name of the current approval folder is displayed next to the arrow buttons.
   c. To skip between requisitions in the approval folder, click on the number of results or the down arrow to open a dropdown menu. Then click on a requisition number to view the document.
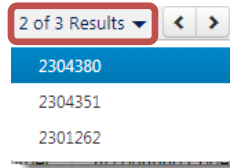
   d. To return to your My PR Approvals list, click the **Back to Approvals** link at the upper left side of the page.

Requisitions Recently Approved By Me

▶ The **Requisitions Recently Approved By Me** page lists all requisitions an Approver has approved, rejected, or returned in the last 30 days (by default).
1. Go to Orders > Approvals > Requisitions Recently Approved By Me.
2. Requisitions approved in the last 30 days appear by default.
   ▶ This listing can be filtered and sorted in the same way as the approval folders.

Assign a Substitute Approver - Requisitions
▶ If a Requisition Approver will be absent, he/she can grant another Requisition Approver access to the approval folders to approve on his/her behalf during the absence.
▶ It is important that the Ad Hoc Approvers designate substitutes when the approver is absent. The designated Ad Hoc Approver is the only approver that can approve of the requisition. The Ad Hoc Approval folders are not shared like typical requisition approval folders.
▶ A user must have the 'Requisition Approver' role to be selected as a substitute Approver.

1. Go to Orders > Approvals > Assign Substitute Approvers - Requisitions
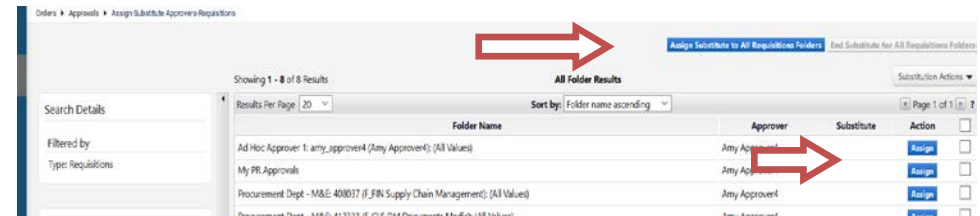
Assign a Substitute Requisition Approver to Ope Folder
1. Determine the approval folder you would like to set up a substitute.
2. Click the folder's corresponding **Assign** button to assign a substitute to a single folder. The Assign Substitute window appears.
3. In the **Substitute Name** field, enter the approver's name. Matching results will appear in a dropdown. Select the appropriate Approver.
4. If you would like the substitution to immediately begin, click the **Assign** button.
   a. The substitution is now complete. You will see the approver's name under the **Substitute** heading of the corresponding approval folder. Skip step 6.

   b. NOTE: You will need to end the substitution manually. See **Removing Substitute Approvers** instructions in the next section of this document for details.
5. If you would like to set a date range for the substitution to begin and end, click the **Include Date Range for Substitution** checkbox.
   a. The **Start Date** and **End Date** fields appear. Choose a start and end date and time in the fields provided.
   b. Once complete, click the **Assign** button to set the substitution.
   c. The system will automatically start and end the substitution on the dates and times you specify. You do not need to take further action to set or end the substitution.

d. You will see the approver's name under the Substitute heading of the corresponding approval folder with the begin and end date and time specified.

6. If this is a future substitution, you will see the ➡ future icon. Once the substitution is in progress, you will see the 🔄 active icon.

7. Repeat these steps for any other folders you would like to assign substitutes.

Assign a Substitute Approver to <u>All</u> Requisition Folders
▸ If you need to assign approvers for <u>**all**</u> your approval folders, including your Ad Hoc Approval folders, you may do so in one step.
1. Click the Assign Substitute to All Requisition Folders button at top of the My Approvals list. The Assign Substitute window appears.

2. In the Substitute Name field, enter the approver's name. Matching results will appear in a dropdown. Select the appropriate Approver.
3. If you would like the substitution to immediately begin, click the Assign button.
   a. The substitution is now complete. Skip step 5.
   b. NOTE: You will need to end the substitution manually. See **Removing Substitute Approvers** instructions in the next section of this document for details.
4. If you would like to set a date range for the substitution to begin and end, click the Include Date Range for Substitution checkbox.
   a. The Start Date and End Date fields appear. Choose a start and end date and time in the fields provided.
   b. Once complete, click the Assign button to set the substitution.
   c. The system will automatically start and end the substitution on the dates and times you specify. You do not need to take further action to set or end the substitution.

d. You will see the approver's name under the Substitute heading for every approval folder with the begin and end date and time specified.
e. If this is a future substitution, you will see the ➡ future icon. Once the substitution is in progress, you will see the 🔄 active icon.

Removing Substitute Approvers
▸ If you specified a substitution date range, you **do NOT** need to manually remove the substitute. The system will automatically remove the substitution at the specified end date and time. You may follow the steps below to remove a substitution early.
▸ If you did not specify a substitution date range, you **DO** need to manually remove the substitute upon your return following the steps below.

1. Go to 🏢 Orders > Approvals > Assign Substitute Approvers - Requisitions
2. Determine the folder(s) from which you would like to remove the substitute Approver.
   a. Click the Remove button next to each folder.
3. Alternatively, end the substitution for all folders by clicking the End Substitute for All Requisition Folders button at the top of the page.