

# Approvals Training

# Agenda

- Overview
- Navigation
- Review
- Approval

# Overview

## Overview – What is Approval?

Approval in Buy A&M is the means identified approvers use to approve or disapprove of a procurement document. Administrators establish who can approve, under what circumstances each person approves, and in what order.

When a document is submitted for approval, Buy A&M determines which users that must approve based on the criteria established by Administrators, and notifies each approver via email once it is their turn to approve a document. Additional approvers may also be added manually by the user submitting a document, or any of that document's approvers.

# Overview – Approval Options

Approval Option	Description
Approve	If additional approvals are necessary, approving a document will automatically notify the next approver. If no additional approvals are necessary, the document will change status to allow for further processing, and the user that needs to process the document will be automatically notified.
Disapprove	<p>The document changes to “Returned” status (except for “Evaluated” Bids). The creator is automatically notified and is given the ability to re-open the document, which returns it to “In Progress” status and allows them to edit it.</p> <p>It is highly recommended that you enter your reasons for disapproval in the <b>Comment</b> section below the approval options in order to provide the creator with guidance about how to fix the document. If the document is re-submitted for approval, it must be approved again by all triggered approvers.</p>
Cancel	The document is cancelled, and can never be edited or re-opened. However, the document can still be cloned, which creates a new copy of the document.

# Overview – Approval Terms

<b>Terms</b>	<b>Description</b>	<b>Purpose</b>
Level	From smallest to largest, the order that users will be asked to approve within an approval path.	If multiple approval paths are triggered with the same priority, Buy A&M will determine the order of approval based on the Level given to each approver.
Primary	A user that is responsible for providing approval at any one Level on an approval path.	There must be one Primary approver at every Level assigned within an approval path.
Alternate	A user that can provide approval instead of the Primary approver at any one Level on an approval path.	Alternates can approve on a specific approval path when the Primary is unable. Alternates receive the same approval notifications as the Primary.
Proxy	A user that can provide approval in place of another user across all approval paths.	If an approver will be unavailable to approve for an extended period, a Proxy user can be activated that will be able to approve any document in place of the approver. Proxy users receive the same approval notifications as the approver.

# Overview – “Ready for Approval” Status

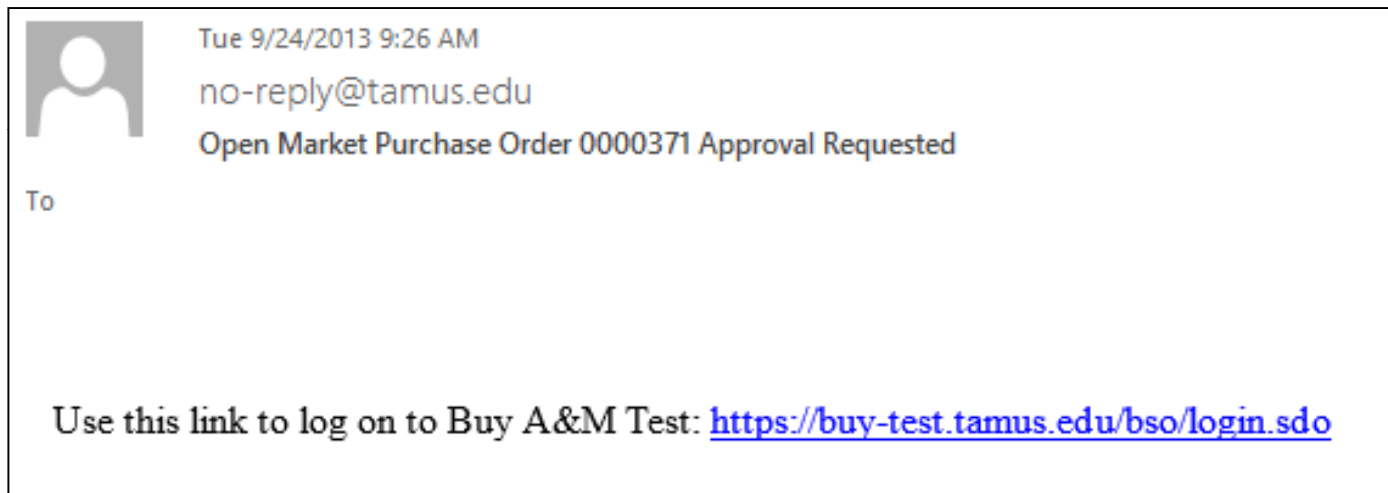
Document Type	Approval Question	Fields Available to Edit
Requisition	<u>Open Market and Release Requisitions</u> Should the purchase request be authorized?  <u>RPA Requisitions</u> Should payment be authorized for an order that has already been placed?	<ul style="list-style-type: none"> <li>• Item Commodity Codes</li> <li>• Accounting Information</li> </ul>
Bid	<u>“Ready for Approval” Status</u> Should the solicitation be published?  <u>“Evaluated” or “Opened” Status</u> Should the recommended solicitation award(s) be made?	<ul style="list-style-type: none"> <li>• Bidders List</li> <li>• Attachments</li> </ul>
Purchase Order	<u>Open Market and Release Purchase Orders</u> Should the purchase order be sent to the vendor and associated funds be encumbered?  <u>Contract and (Master) Blanket Purchase Orders</u> Should the finalized contract be sent to the contractor and be made visible publicly?	<ul style="list-style-type: none"> <li>• Item Commodity Codes</li> <li>• Accounting Information (if applicable)</li> </ul>
Change Order	<u>Open Market and Release Purchase Orders</u> Should the change order be applied to the purchase order?  <u>Contract and (Master) Blanket Purchase Orders</u> Should the amendment be applied to the contract?	<ul style="list-style-type: none"> <li>• Subcontractor Information (if applicable)</li> </ul>
Receipt	Is the receipt information accurate?	<ul style="list-style-type: none"> <li>• None</li> </ul>

# Navigation



# Navigation – Overview

Notification email sent to approver.



# Navigation - Homepage Approval Tab

Home - Welcome Back Chris Harris

News(0) Reqs(1) Bids(3) PO(1) **Approval(4)** My Reminders(2) Events(0)

## My Documents Pending Approval

Bid #	Description	Bid Opening Date	Approval Requested	Approver	Approval Status	Date Approved	Approval Type
<a href="#">ADES10-00000100</a>	test	04/16/2010 03:00:00 PM	04/09/2010 11:30:25 AM	Chris Harris	Waiting...		Pre-bid

## Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<a href="#">ADSP010-00000155</a>	11/23/2009	Carpeting	10	Open Market	System Administrator	ADSP0 / SPO	\$15,000.00
<a href="#">ADSP010-00000084</a>	11/05/2009	Elevator Maintenance	10	RPA	Chris Harris	ABA / ABA	\$500.00

[List & Approve](#)

Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status
<a href="#">ADES10-00000100</a>	test	Open Market	04/16/2010 03:00:00 PM	ADES / ADES	Cheryl Wynn	\$10.00	Ready for Approval

# Navigation - List & Approve

## Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<a href="#">ADSP010-00000155</a>	11/23/2009	Carpeting	10	Open Market	System Administrator	ADSP0 / SPO	\$15,000.00
<a href="#">ADSP010-00000084</a>	11/05/2009	Elevator Maintenance	10	RPA	Chris Harris	ABA / ABA	\$500.00

[List & Approve](#)

Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status
<a href="#">ADES10-00000100</a>	test	Open Market	04/16/2010 03:00:00 PM	ADES / ADES	Cheryl Wynn	\$10.00	Ready for Approval

## Requisitions Pending My Approval

Select	Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<input type="checkbox"/>	<a href="#">ADSP010-00000439</a>	04/13/2010	Office Paper	10	Release	Chris Harris	DMM / DMM	\$0.00
<input type="checkbox"/>	<a href="#">ADSP010-00000155</a>	11/23/2009	Carpeting	10	Open Market	System Administrator	ADSP0 / SPO	\$15,000.00

Approve Action:  Approve  Disapprove  Cancel Requisitions

Comment:


Apply Approval Action to Selected

Reset

Cancel & Exit

# Review

# Review - Summary Tab

Release Requisition ADSP010-00000122 Status: 1RGP - Gone to PO 

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

**Header Information**


<b>Requisition Number:</b>	ADSP010-00000122	<b>Short Description:</b>	Envelopes	<b>Status:</b>	1RGP - Gone to PO
<b>Department:</b>	ADOA - Arizona Department of Administration	<b>Location:</b>	GAO - General Accounting Office	<b>Required By Date:</b>	
<b>Entered Date:</b>	11/12/2009	<b>Requisition Type:</b>	Release	<b>Type Code:</b>	
<b>Requestor:</b>	Angela Dillard	<b>Purchaser:</b>		<b>Fiscal Year:</b>	2010
<b>Contact:</b>	Angela Dillard	<b>Contact Phone:</b>	(555)555-1212	<b>Alternate ID:</b>	
<b>Pcard Enabled:</b>	Yes	<b>Estimated Cost:</b>	\$866.92	<b>Print Format:</b>	Requisition

**Item Information**

**Approval Path:**

Clone Requisition Print

# Review – Header Information

Release Requisition ADSP010-00000543 Status: 1RRA - Ready for Approval 

General Items Vendors Address Accounting Routing Attachments(1) Notes(1) Reminders **Summary**

**Header Information**

<b>Requisition Number:</b> ADSP010-00000543	<b>Short Description:</b> Projector	<b>Status:</b> 1RRA - Ready for Approval
<b>Organization:</b> State Procurement Office		
<b>Department:</b> CSA - Arizona State Board for Charter Schools	<b>Location:</b> CSA - Arizona State Board for Charter Schools	<b>Required By Date:</b> 04/15/2010
<b>Entered Date:</b> 04/15/2010	<b>Requisition Type:</b> Release	<b>Type Code:</b>
<b>Requestor:</b> Heather Kelley	<b>Purchaser:</b>	<b>Fiscal Year:</b> 2010
<b>Contact:</b> Heather Kelley	<b>Contact Phone:</b> (602)364-3085	<b>Alternate ID:</b>
<b>Pcard Enabled:</b> No	<b>Estimated Cost:</b> \$1,600.00	<b>Print Format:</b> Requisition
<b>Ship-to Address:</b> Arizona State Board for Charter Schools 1700 W. Washington St. Suite 164 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (602)364-3085	<b>Bill-to Address:</b> Arizona State Board for Charter Schools 1700 W. Washington St. Suite 164 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (602)364-3085	
<b>Project No.:</b>		
<b>Notes:</b> Highest resolution projector necessary for special presentations.		
<b>Attachments:</b> <a href="#">Vendor's Quote</a>		

# Review – Header Information Standard Fields

Field	Description
Description (or Short Description)	The description of the document.
Fiscal Year	The fiscal year that the document is intended for.
Department/Location	Displays the business units that initiated the document.
Document (Requisition, Bid or PO) Type	The type of Requisition, Bid or PO that has been submitted. Refer to the <b>Detailed Definitions</b> document.
Purchaser	The Basic Purchasing (BP) user that owns the document. For Requisitions, this is the BP user that the document will be routed to following approval.
Cost (Estimated or Actual)	The total cost of all goods/services on the document.
Ship-to and Bill-to Addresses	The shipping and billing addresses for the items on the document. Note that individual items may have different addresses. If so, these addresses will appear in the <b>Item Information</b> section next to the item.
Attachments	The files attached to the document. Clicking a file allows you to download it.

# Review – Item Information

## Item Information

Item Description

1-5 of 6  
1 2

Item # 1 : LGE PROJECTORS (PRICE: 20% OFF LIST), see <https://www.trox.com> for List Prices (Audio and Video Products and Services) 1RI - In Progress

NIGP Code: 880-11  
Audio Visual Equipment and Supplies (Not Otherwise Classified)

Commodity Code

Blanket/Contract #/Line #	Qty	Minimum Order Quantity	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
<a href="#">EPS060125-13-A8 / 138</a>	4.0	0.0	\$400.00	\$400.00	EA - Each	\$0.00		\$0.00	\$1,600.00

Manufacturer:

Brand:

Model:

Make:

Packaging:

Account Code	Amount
11-40500- -7599- -----	\$1,600.00

Accounting Distribution

Recommended Vendor: 9000002846 - Troxell Communications  
Mary Casby  
4830 S 38th Street  
Phoenix, AZ 85040  
US  
Email: [test@periscopeholdings.com](mailto:test@periscopeholdings.com)  
Phone: (602)437-7240



# Review – Item Information Standard Fields

Field	Description
Print Sequence #	The order the items will appear to vendors and on printed versions of the document.
Item #	The order the item was added to the document.
NIGP Code	The 5-digit commodity code associated with the item.
Blanket or Contract # / Line #	For contract items only – The contract number that the item appears on and its item number on that contract.
Receipt Method	The <u>Quantity Receipt Method</u> means that users will only be able to receive the item by the quantity that was delivered. This is the preferred method for commodities. The <u>Dollar Receipt Method</u> means that users will only be able to receive the item by an invoiced dollar amount. This is the preferred method for services.
Quantity	The desired quantity of the item.
Unit Cost	The cost per one unit of the item.
Unit of Measure	The unit of measure for the item.
Discount %	The standard discount percentage for each unit of the item. Negative numbers signify a markup.
Total Discount Amount	The total dollar discount for the item. Negative numbers signify a markup.
Tax Rate	The tax rate applied to the item – should not be applicable for TAMUS
Tax Amount	The total tax amount applied to the item.
Total Cost	The total cost of the item including all discounts and taxes.
Manufacturer / Brand / Model / Make / Pckg	The specific product details. These fields are optional.
Account Code / Amount	The account code(s) charged for the item, and the amount charged to that account code. Will also display Extended Accounting values entered if applicable

# Review – Requisitions

Release Requisition ADSP010-00000543


Status: 1RRA - Ready for Approval 

General Items Vendors Address Accounting Routing Attachments(1) Notes(1) Reminders **Summary**

## Header Information

<b>Requisition Number:</b>	ADSP010-00000543	<b>Short Description:</b>	Projector	<b>Status:</b>	1RRA - Ready for Approval
<b>Organization:</b>	State Procurement Office				
<b>Department:</b>	CSA - Arizona State Board for Charter Schools	<b>Location:</b>	CSA - Arizona State Board for Charter Schools	<b>Required By Date:</b>	04/15/2010
<b>Entered Date:</b>	04/15/2010	<b>Requisition Type:</b>	Release	<b>Type Code:</b>	
<b>Requestor:</b>	Heather Kelley	<b>Purchaser:</b>		<b>Fiscal Year:</b>	2010
<b>Contact:</b>	Heather Kelley	<b>Contact Phone:</b>	(602)364-3085	<b>Alternate ID:</b>	
<b>Pcard Enabled:</b>	No	<b>Estimated Cost:</b>	\$1,600.00	<b>Print Format:</b>	Requisition
<b>Ship-to Address:</b>	Arizona State Board for Charter Schools 1700 W. Washington St. Suite 164 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (602)364-3085	<b>Bill-to Address:</b>	Arizona State Board for Charter Schools 1700 W. Washington St. Suite 164 Phoenix, AZ 85007 US Email: test@periscopeholdings.com Phone: (602)364-3085		
<b>Project No.:</b>					
<b>Notes:</b>	Highest resolution projector necessary for special presentations.				
<b>Attachments:</b>	<a href="#">Vendor's Quote</a>				

# Review – Change Orders

Change Order (Ready for Approval) - Open Market Purchase Order ADSP010-000255 Status: 3PS - Sent 

[General](#)
[Items](#)
[Subcontractors](#)
[Address](#)
[Accounting](#)
[Attachments\(1\)](#)
[Summary](#)
[Back to PO](#)

Comment for the whole change order:

**Header/Item Changes**

Modified Field	Item #	Description	User Updated	Date Updated	Show to Vendor
Item status changed	2	Item 2 canceled	Chris Harris	09/22/2010 08:31:05 AM	Yes
Comment:					

**Item Accounting Changes**

Modified Field	Item #	Account Code	Fiscal Year	Description	User Updated	Date Updated
Account Code	1	11-40500- -7599- -----	10	Account code added.	Chris Harris	09/22/2010 08:31:05 AM

**Attachment Changes**

Modified Field	File	Description	User Updated	Date Updated	Show to Vendor
File #	Specifications~4.doc	File 'Specifications~4.doc' added	Chris Harris	09/22/2010 08:31:05 AM	Yes

# Review - Receipts

Receipt # 0000077 (Ready for Approval) - Purchase Order # ADSP011-000441

General Items Attachments Notes **Summary** [Back to PO](#)

### Header Information

<b>Receipt Number:</b>	0000077	<b>Receipt Status:</b>	SCR - Ready for Approval	<b>Receipt Description:</b>	Partial Shipment
<b>PO Number:</b>	<a href="#">ADSP011-000441</a>	<b>PO Status:</b>	3PS - Sent	<b>Alternate ID:</b>	
<b>Department:</b>	ADSP0 - State Procurement Office	<b>Location:</b>	SPO - State Procurement Office	<b>Receipt Owner:</b>	System Administrator
<b>User Created:</b>	System Administrator	<b>Date Created:</b>	07/27/2010 10:59:52 AM	<b>User Last Updated:</b>	System Administrator
<b>Date Last Updated:</b>	07/27/2010 11:01:24 AM				

### Item Information

**Item #1** test item

#### PO Item Receiving Summary [\(View Item Receipts History\)](#)

Receipt Method	Unit Cost	UOM	Ordered Quantity	Received Quantity Receipt Total(PO Receipts Total)	Returned Quantity Receipt Total(PO Receipts Total)	Canceled Quantity Receipt Total(PO Receipts Total)	Net Received Quantity Receipt Total(PO Receipts Total)	Remaining Quantity
Quantity	\$1,500.00	EA - Each	4.0	Received Qty: 0.25(0.25) Qty Adj: 0.0(0.0) <hr/> 0.25(0.25)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	0.25(0.25)	3.75

#### PO Item Receipt Details

Receipt Item #	Receipt Type	Quantity	Comment
<u>1</u>	Receiving	0.25	

# Approval

# Approval – Approval Path Section

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved	Approved/Disapproved/Canceled by	Comment View
	Karen Ingram	1	CONTRACT	1	Primary	09/29/2009 02:01:29 PM	11/18/2009 11:02:42 AM	Karen Ingram	
	Denel Pickering	2	CONTRACT	2	Primary	09/29/2009 02:01:29 PM			
Add New	<input type="text"/>	<input type="text"/>			Primary				

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved	Approved/Disapproved/Canceled by	Comment View
	Karen Ingram	1	CONTRACT	1	Primary	09/29/2009 02:01:29 PM	11/18/2009 11:02:42 AM	Karen Ingram	
	Denel Pickering	2	CONTRACT	2	Primary	09/29/2009 02:01:29 PM			
<input checked="" type="checkbox"/>	Terri Johnson	3		3	Primary	09/24/2010 06:30:35 AM			
Add New	<input type="text"/>	<input type="text"/>			Primary				

# Approval – Selecting an Option

Approval Actions	
Options	<input checked="" type="radio"/> Approve <input type="radio"/> Disapprove <input type="radio"/> Cancel Requisition
Comment	<input type="text"/>
<input type="button" value="Save &amp; Exit"/>	