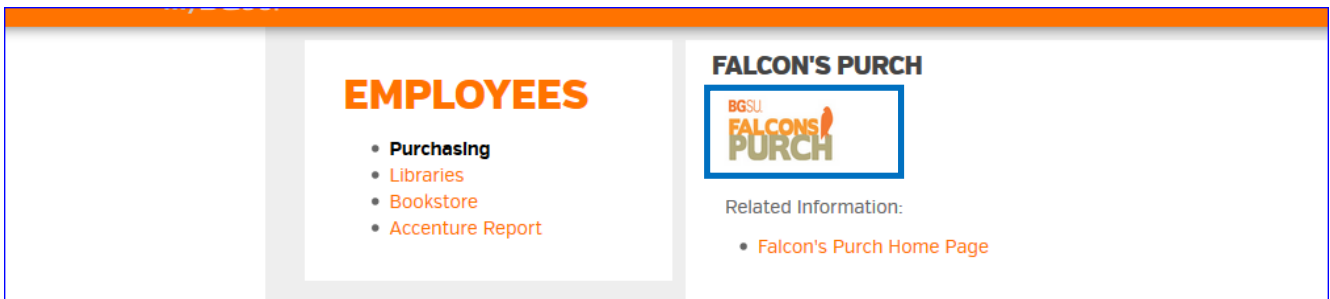


Approver Training Guide

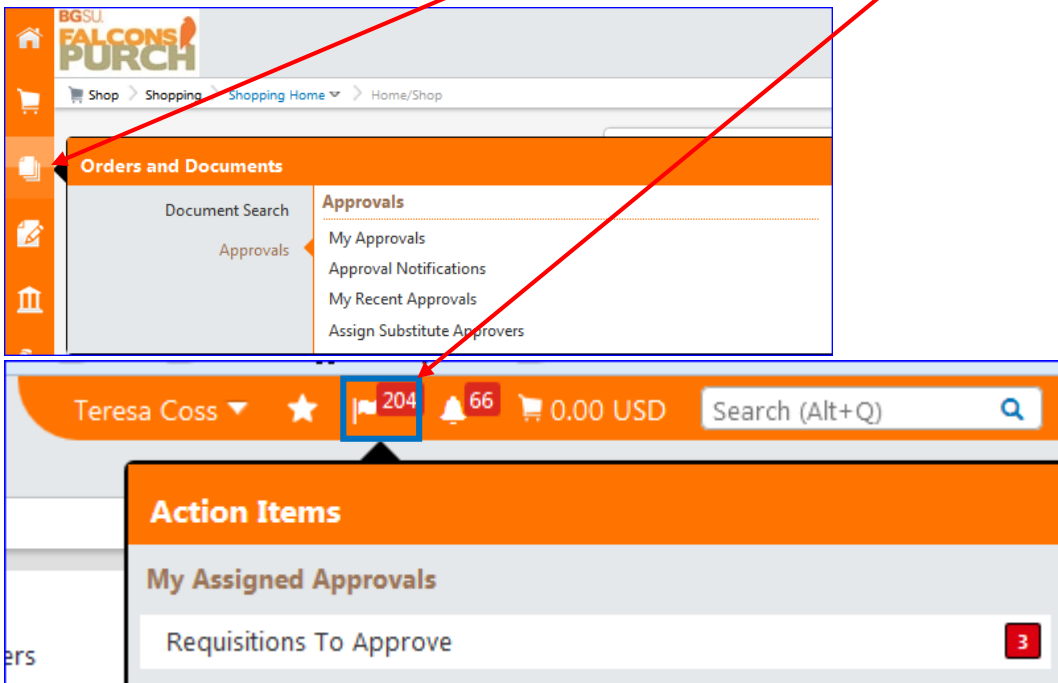
Log in to MyBGSU. Click the [Employees](#) tab and select [Purchasing](#) from the dropdown options.



Then click the [Falcon's Purch](#) logo.

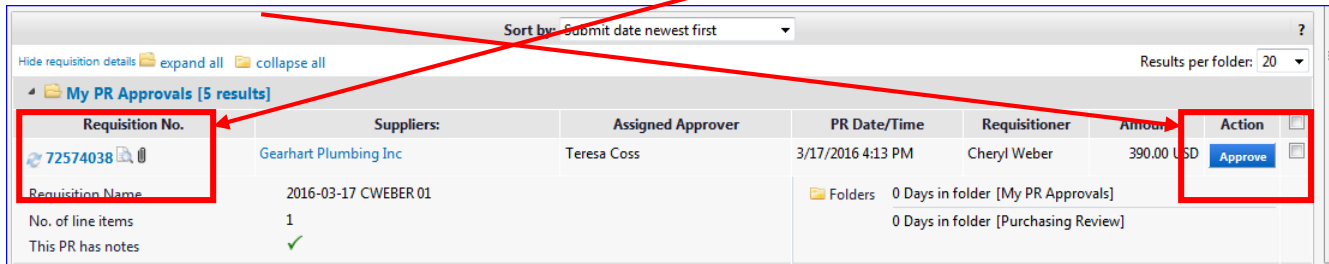


You can access [My Approvals](#) through the [Order and Documents](#) tab or the [Action Items](#) (flag) in the upper right corner of the screen.



Approving

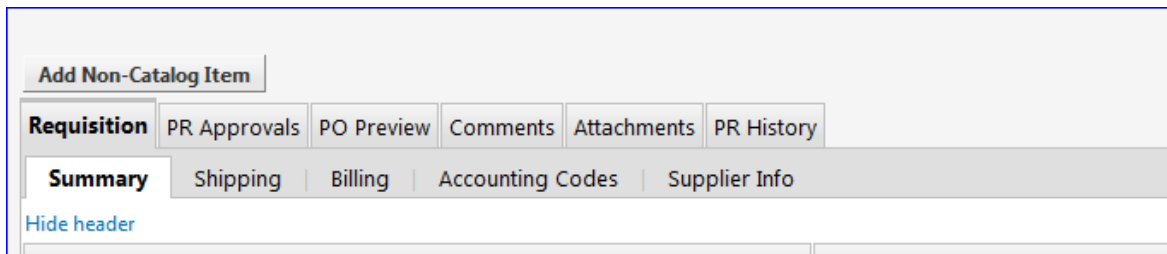
You may have multiple requisitions to approve. Click on the [Requisition No.](#) to view the requisition or click on [Approve](#) under [Action](#).



| Requisition No. | Suppliers: | Assigned Approver | PR Date/Time | Requisitioner | Amount | Action |
|-----------------|-----------------------|-------------------|-------------------|---------------|------------|-------------------------|
| 72574038 | Gearhart Plumbing Inc | Teresa Coss | 3/17/2016 4:13 PM | Cheryl Weber | 390.00 USD | Approve |

Requisition Name: 2016-03-17 CWEBER 01
No. of line items: 1
This PR has notes: ✓

After clicking on the requisition number to open it, you can navigate between the different tabs to view information.



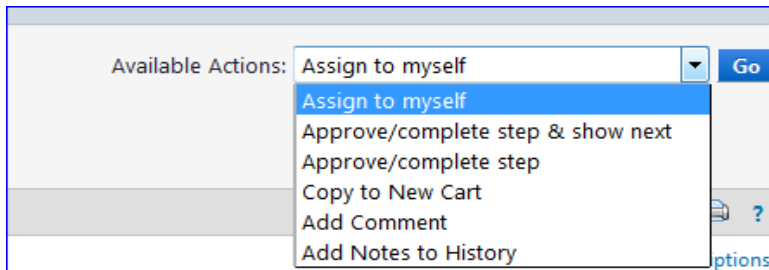
[Add Non-Catalog Item](#)

Requisition | PR Approvals | PO Preview | Comments | Attachments | PR History

Summary | Shipping | Billing | Accounting Codes | Supplier Info

[Hide header](#)

In the upper right corner click on the [Available Actions](#) dropdown. Selecting one of the [approval options](#) and then click [Go](#).

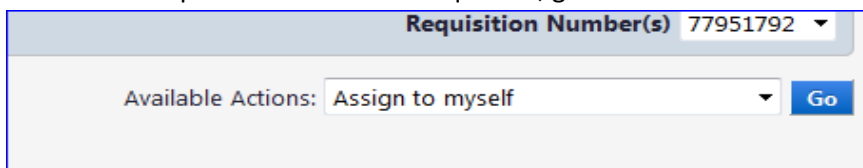


Available Actions: [Assign to myself](#) [Go](#)

- [Assign to myself](#)
- [Approve/complete step & show next](#)
- [Approve/complete step](#)
- [Copy to New Cart](#)
- [Add Comment](#)
- [Add Notes to History](#)

Returning a Requisition

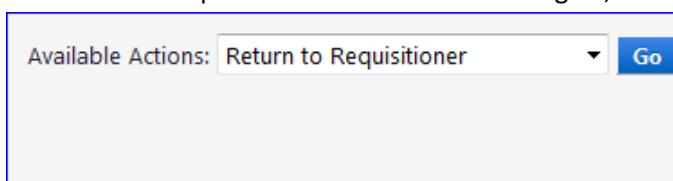
To return a requisition back to the requestor, got to [Available Actions](#). Select [Assign to Myself](#), click [Go](#).



Requisition Number(s) 77951792

Available Actions: [Assign to myself](#) [Go](#)

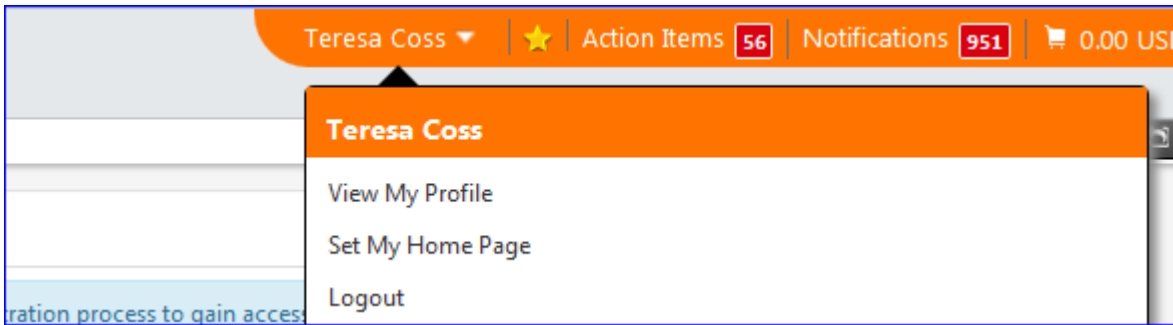
Click on the dropdown for [Available Actions](#) again, this time selecting [Return to Requisitioner](#).



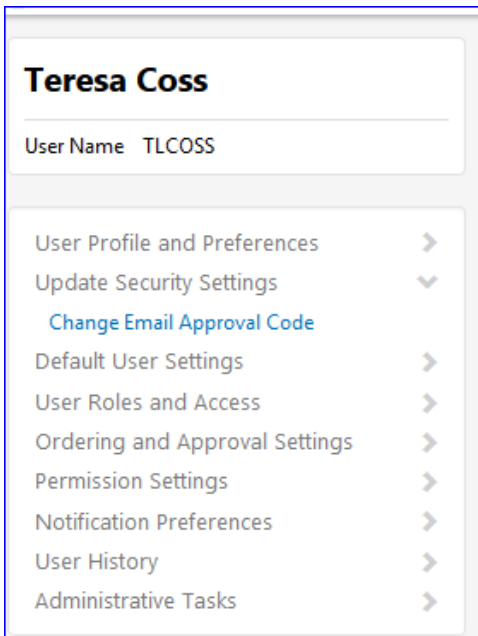
Available Actions: [Return to Requisitioner](#) [Go](#)

Email Approval Setup

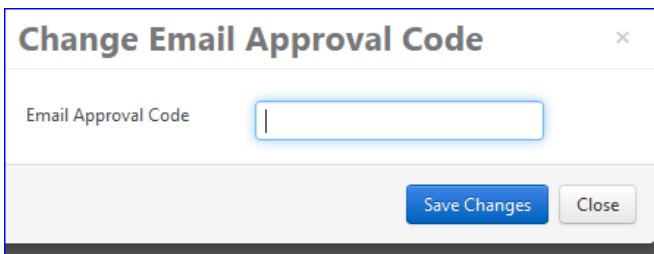
To enable the ability to approve requisitions via email, click on your name in the upper right corner, select [View My Profile](#).



On the left navigation select [Update Security Settings](#) > click on [Change Email Approval Code](#).



Enter an email approval code. The code may be a combination of characters, numbers and letters and with a minimum length of 6 characters.



When you have a requisition to approve you will receive an email as shown below. Click on the [Take Action](#) button at the bottom of the email.

New Pending Approval for Requisition# 27591309
falcons Purch@bgsu.edu
Sent: Wed 2/8/2012 11:00 AM
To: Maureen Ireland

Approval Request for Requisition# 27591309

Dear Maureen Ireland,

The requisition listed below has been submitted for your approval.

Summary

Folder: Purchasing Review
Prepared by: Linda Szych
Cart Name: 2012-02-08 LSZYCH 02
Requisition No.: 27591309
Priority: Normal
No. of line items: 1

TOTAL: 409.95 USD

Accounting Codes

Business Unit GL: BGSUN - BGSUN
Speedchart: 117000CRSE - Musical Arts Dean-CRSE
Fund: 13000 - Course Fees - BG Campus
Dept: 117000 - Musical Arts Dean
Project/Grant:
Activity:
Function: 4000 - Academic Support
PC Business Unit:
Account: 53100 - Office Supplies*
Program: 9010 - Departmental Program #9010
Budget Reference:

Details

School Outfitters LLC

Item 1 (Non Catalog Item)
Description: Graphics Magnetic Whiteboard-Music Staff Lines-
Aluminum Frame 4'Hx 8'W
Catalog Number: MAR-PR-408-MS
Quantity: 1
Unit Price: 409.95 USD
Ext. Price: 409.95 USD
Size/Packaging: 1/EA
Commodity Code: 10000000

TOTAL: 409.95 USD

Ready to approve, reject or assign this document to yourself? [Take Action](#)

You will then proceed to enter your [Approval Code](#) and either [Approve](#) or [Assign to myself](#) to return the requisition back to the requestor.

Actions

Approval Code *

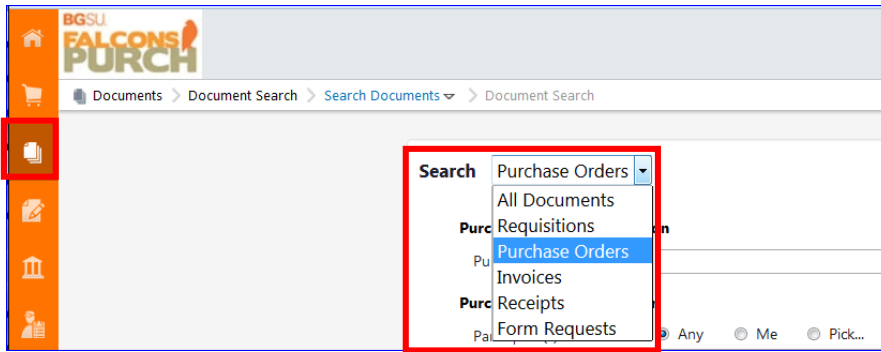
Comment

Assign to myself

Approve

Search and Export

Hover over the Documents icon and click on Search Documents. Select the documents you would like to search



for.

Select your criteria and then click on Search. The example below will locate all open POs that were prepared by Kim Griner.

Search Purchase Orders simple search

Purchase Order Identification
Purchase Order Number(s)

Purchase Order Information
Participant(s) Any Me Pick...

Owner

Prepared By

Approved By

Date

Total Amount

Supplier

Department

Receipt Status
 No Receipts Fully Received
 Partially Received Over Received

Invoice Status
 No Invoices Fully Invoiced
 Partially Invoiced Over Invoiced

Matching Status
 Partially Matched Fully Matched
 No Matches

AP Status
 Open Soft Closed
 Closed

If you would like a spreadsheet of the search results, click on Export Search.

Showing 1 - 9 of 9 Results All Dates Create Quantity Receipt Go

Search Details Results Per Page 20 Sort by: Best match Page 1 of 1 ?

Filtered by
Type: Purchase Orders
Date Type: Creation Date (System)
Date Range: All Dates [remove all]

Prepared By
 Kimberly Griner

AP Status
 Open

Save New Search Export Search

| PO No | Supplier | Creation Date/Time | Requisition No. | Requisitioner | Supplier Status | Settlement Status | PO Total |
|--------------|---|--------------------|-----------------|-----------------|-----------------|-----------------------------|--------------|
| ✓ BG70008088 | Syn-Tech Systems | 11/29/2016 2:34 PM | 81824489 | Kimberly Griner | Sent | Receipt-Required No Matches | 918.75 USD |
| ✓ BG70007926 | Amazon Capital Svcs dba Amazon Business | 11/22/2016 5:18 PM | 81714407 | Kimberly Griner | Sent | No Matches | 69.20 USD |
| ✓ BG70007686 | Amazon Capital Svcs dba Amazon Business | 11/17/2016 2:31 PM | 81436016 | Kimberly Griner | Sent | No Matches | 15.99 USD |
| ✓ BG70007683 | Spieker Company | 11/17/2016 1:45 PM | 81535427 | Kimberly Griner | Sent | Receipt-Required No Matches | 8,535.00 USD |
| ✓ BG70004471 | Sunbelt Rentals | 9/15/2016 3:49 PM | 79102250 | Kimberly Griner | Sent | Receipt-Required | 1,241.10 USD |

Enter a File name and select the Request Export Template. Click Submit.

Document Search Export

Request Export (Step 1 of 1) ?

File Name *

Description

Request Export Template *

Description

★ Required Submit

Click Go to Page: Download Export Files.

Request Submitted

The export request has been successfully submitted.

Pending and completed exports are available in:

Documents > Document Search > Download Export Files

Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

Go to Page: Download Export Files Close

Click on the Download Exports tab to refresh the page. Click on the File Name when the Export Status is Completed.

Exports with a status of 'Complete' are available to be downloaded. Exports with a status of 'Pending' are currently being queued by the system. The amount of time it takes to generate an export file will vary on the amount of data being exported.

If you would like to receive a notification when your export is ready, make sure 'Search Result Export Confirmation' is selected in your [Notification Preferences](#)

[Click to filter exports ?](#)

Results Per Page: 20 Results found: 3

| File Name | Description | Request Date / Time | Expiration Date | Export File Size | Export Status |
|------------------------------|-------------|---------------------|-----------------|------------------|---------------|
| Open POs.zip | | 11/30/2016 8:49 AM | 12/7/2016 | 3.0 KBytes | Completed |
| Kidd.zip | | 11/29/2016 3:22 PM | 12/6/2016 | 11789.0 KBytes | Completed |
| Kidd.zip | | 11/29/2016 2:27 PM | 12/6/2016 | 13.0 KBytes | Completed |

Click OK to open the zip folder.

Opening Open POs.zip

You have chosen to open:

Open POs.zip
which is: Compressed (zipped) Folder
from: <http://solutions.sciquest.com>

What should Firefox do with this file?

Open with: Windows Explorer (default)

Open in browser as: Text

Save File

Do this automatically for files like this from now on.

OK Cancel

Click on the first Excel workbook.

| Name | Type | Compressed size | Password ... | Si |
|--|----------------------------|-----------------|--------------|----|
| Open POs.csv | Microsoft Excel Comma S... | 3 KB | No | |
| Open POs-FormData_.csv | Microsoft Excel Comma S... | 1 KB | No | |