Approver Guide

This guide will review how to review and approve requests to purchase items via CTW OneSource, the University’s new purchasing portal.

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Logging In
1. Open your web browser
2. Log into WesPortal and find the link to OneSource in the Finance folder
   OR
3. In the address field, type https://wesleyan.unimarket.com and enter your Wesleyan username and password
   OR
4. Click the link in the approval notification email received.

If you experience any issues logging in, please contact purchasing@wesleyan.edu.

Approval Process

Once buyers checkout their online shopping cart, a “requisition” is created and routed for approval based on the WFS SmartKey information and any special additional handling in the requisition. Email notices are sent to the approvers as their actions are required for the purchase to be executed and the order sent to the vendor. If action is not taken within 24 hours from the first notice, a reminder email will be sent. If no action is taken within 10 days of the approval task, the approval will be escalated to the next approver with authority to take the approval action. If the approver is the last in the approval chain and the 10 days have passed, the requisition will wait for the approver to act.

The approval routing is based on SmartKey for each line item on the requisition along with the subtotal of the requisition. Approvers in an approval chain are assigned an approval Level, designating the dollar amount they have the authority to approve in WFS. If a requisition is for a dollar amount larger than the Approver’s approval level, the approval will continue up the chain until a user with enough authority approves the requisition.
Approval Notifications

Email Notifications
You will receive an email from OneSource@ctwonesource.wesleyan.edu notifying you of the approval task requiring you to take action. An example of the email that will be received is shown below. The link in the notification email will take you directly to approval tasks view.

![Wesleyan University Approval Required](image)

If another individual within your approval group has responded to the approval request, you will receive another email notifying you that your approval is no longer needed. An example of this type of email is shown below.
**Approval No Longer Required**

Wesleyan University

Requisition OSR0000261 (Carolina Biological Supply Company) for Terry Emmons: No further action required.

Your approval is no longer required because the requisition has already been Approved or Cancelled. The approval task has been removed from your approval queue.

<table>
<thead>
<tr>
<th>Description</th>
<th>Supplier</th>
<th>Account Code</th>
<th>Qty</th>
<th>Distribution</th>
<th>Percentage</th>
<th>Unit Price</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Column Gratnell Trolley Storage Cart (15x17x34&quot;)</td>
<td>Carolina Biological Supply Company</td>
<td>1001093100-84020-100-1093</td>
<td>1</td>
<td></td>
<td>(100.00%)</td>
<td>$252.35</td>
<td>$252.35</td>
</tr>
<tr>
<td>1 25-mil Membrane Kit, Set of 6</td>
<td>Carolina Biological Supply Company</td>
<td>1001093100-84020-100-1093</td>
<td>1</td>
<td></td>
<td>(100.00%)</td>
<td>$56.65</td>
<td>$56.65</td>
</tr>
</tbody>
</table>

**Subtotal** $309.00

**Shipping** $0.00

**TOTAL** $309.00
Notifications in CTW OneSource
You will know that you have approvals waiting for your review when a red number appears next to Tasks in the menu bar of OneSource.

In addition to the Task menu alerts you will have a quick view window for approvals on your Dashboard that will show the 4 most recent requisitions awaiting your approval.

Clicking the Approvals menu, the Dashboard Approvals or the View All approvals link in the quick view window will take you to the Approvals page. The Approvals page will display all of your outstanding approval actions as well as additional Unavailability and Proxy settings.
Approval Page

Requisition Approval Overview
The approval page will display all outstanding approvals with the requisition number, buyer’s name, supplier, order type, date it was created and total. Because you have received the accounting and line detail in your email notification, you may be informed enough to utilize the Approve/Decline option from this page. You can also change the Approval State search filter to view any approvals that you have already taken action on, approved or declined.

Approve/Decline Window
If you click on the requisition number, the Approval button will appear in the upper right corner of the requisition, next to the Actions button.

Clicking on the Approval button will open a window where you can Approve or Decline the requisition and enter a comment for either action that is recorded in the approval history.

***Important Note about Declining Purchase Requests***
Ideally we would like to avoid declining a requisition as much as possible, especially if it has multiple lines across different Smartkeys. Declining a requisition for a single line will decline the entire
requisition and force the Buyer to copy the original requisition and reroute for approval. Many actions can be completed via the “Comments” tab.

We are recommend that the “Comments” tab from within the requisition be used as much as possible (rather than declining) to help provide any corrections that may be needed. The Buyer will receive an email as soon as a comment is entered and can edit the requisition as needed. See “Comments on Requisitions” at the end of this guide for further instructions on how to add comments.

If the approver truly does not want any item on the requisition to be purchased then declining it would be appropriate.

Assigning Proxy
To set yourself as unavailable and/or assign a proxy approver, click the “Out of Office” link from the User menu.

You can also click the Change Availability link from the Approval section of the Task Menu. In the Change Availability window, check the box to indicate that you are unavailable, select the date.times that you will be unavailable from and to. You can also assign a proxy approver to take the approval actions while you are unavailable. You will still receive the approval notifications and can act even if you are marked as unavailable. The proxy user will also receive the notification and be able to take the same action as delegated by you assigning them as your proxy.
Once you set your unavailability, you will see a confirmation message until you become available again.

⚠️ You are currently NOT available until 6/5/2019 11:59 PM and will not receive any approval requests. Approvals will be sent to your proxy Valerie Nye.

Change Availability »
Requisition View

Actions
The requisition view as an approver will present two actions at the top right corner of the page, Approval and Actions. Within the Actions menu you will have the ability to Copy the requisition or Edit the requisition.

- Approval

... will open the Approve/Decline window just like the Approvals page option shown above.

Editing a requisition while in the approval process will allow you as an approver to edit the below details of the requisition.

- Ship To addresses for the requisition
- Add or delete Attachments
  - Justification Attachments stay internal and will not be sent to the supplier
  - Order Attachment will be sent to the supplier by default but can be selected to not be sent
- Edit notes
  - Justification notes are for internal use and will not be visible to the supplier
  - Delivery Notes are sent to the supplier on the purchase order
- Wesleyan University SmartKey
  - Editing the SmartKey may change the routing of the approval
  - When you edit any of the SmartKeys, the budget check will be performed again to ensure that the buyer has the proper authority for the newly entered SmartKey in WFS.

Once you have completed your edits or additions to the requisition, you need to click the Save button at the bottom of the screen to finalize the updates.

Note: The system checks the WFS budget at each step of the approval process. If budget has been spent between approvals, a message will appear and either the buy will need to move budget to fund
the expense or the approver can put in a different smartkey. Actual budget encumbrance does not take place until the requisition has been fully approved.

**Approval History**
Click the Approvals tab on the Requisition to view the approval history. The approval history shows all past approval actions and upcoming approvals needed before the requisition becomes a Purchase Order. The approval history is shown to anyone who has the ability to view the requisition.

The approval history shows the following information.

- Approval Chains name and routing basis
- Approver or approval group
- The task Created Date - date/time that the approval task was originated for the approver(s)
- Task Completed Date – date/time that the approval task was completed by the approver
- Level – authorization level for the approver(s)
- Reason – any comment entered by the approver when task was completed
- Action taken will display at the far right displaying if the action was Approved, Skipped, Escalated or Declined

![Approval History Table]

- **Items**
  - Approval Process Instance
    - Current

- **Approvals**
  - Academic Affairs Dept Approval, 3-1093 Academic Affairs ([1001093100-84020-100-1093])

- **Comments**
  - Completed Date
  - Level
  - Type
  - In Progress

- **T Westmoreland**
  - 6/4/2019 9:08 PM
  - ([1000] $[1,000.00])
Comments on Requisitions

The comments feature on requisitions allows both buyers and approvers to post comments and be automatically alerted by email. This saves valuable time in those situations when approvers have questions around the need for an item or require more specifics relating to a product or service.

A comment from an approver will send an email alert to the buyer and a comment from the buyer will send an alert email to the current approver. All past and future approvers will be able to view the comments on the requisition within the Comments tab.