

Approval via **Guided BU**ying

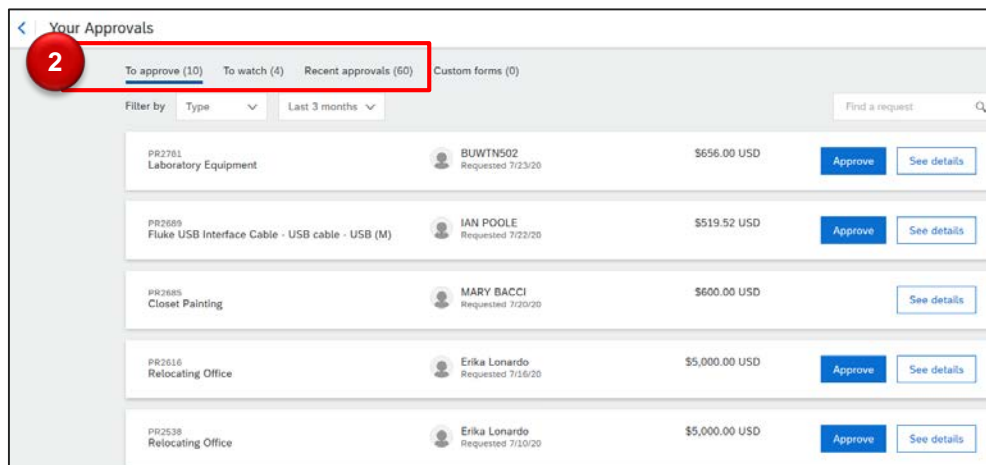
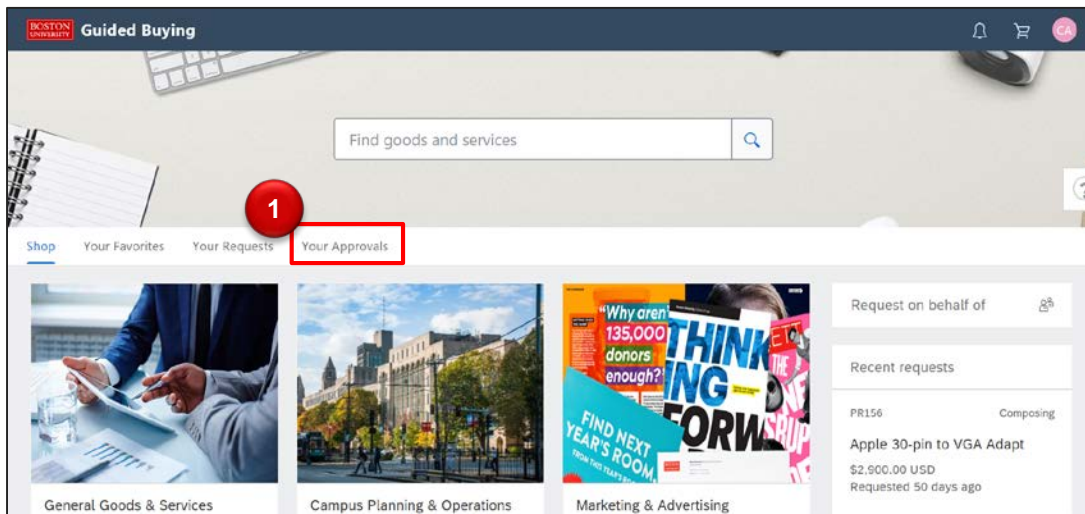


Approval via Guided BUYing

Approvers will receive notifications from **Guided BUYing** each time a PR requires approval. Alternatively, to see all PRs pending approval, log in to **Guided BUYing** and select the **Your Approvals** tab.

1 Click the **Your Approvals** tab on the **Guided BUYing** homepage.

- 2 **Select a tab:**
- **To approve:** PRs pending your approval.
 - **To watch:** PRs for which you have been added as a watcher. No action is required.
 - **Recent approvals:** PRs approved or denied.



Approval via Guided BUying

PRs for your approval will display based on filter settings. Filter approvals by type, time frame, or search for a specific PR.

The screenshot shows the 'Your Approvals' page with the following elements:

- 3** Tab: **To approve (10)**
- 4** Search bar: **Find a request**
- 5** Action button: **See details**

| PR Number | Description | Requester | Amount | Status |
|-----------|---------------------------|---------------|----------------|-------------|
| PR2781 | Laboratory Requisition | BUWTN502 | \$656.00 USD | Approve |
| PR2689 | Fluke USB Interface Cable | IAN POOLE | \$519.52 USD | Approve |
| PR2685 | Closet Painting | MARY BACCI | \$600.00 USD | See details |
| PR2616 | Relocating Office | Erika Lonardo | \$5,000.00 USD | Approve |
| PR2538 | Relocating Office | Erika Lonardo | \$5,000.00 USD | Approve |

3 Click the **To approve** tab.

4 Filter by type and date range.

After applying a filter, type in a PR# or scroll through PRs.

5 Click **See details** to review and either approve or deny the PR.

Approval via Guided BUYing

Review the PR details including Approval Flow, comments, and header information.

Relocating Office
Request details / PR2616
Total Cost \$5,000.00 USD
Approve Deny

Submitted

Approval Flow
Click on the line to add approvers

Request → DAWNA JOHNSON → DHRUBAN (SSP)... → Approved

Comments
Write your comment...
 Share with supplier Add

Ship to
541 Commonwealth Avenue
Boston, MA 02215
United States

Charge to
Cost Center (1020400003 (SOURCING & PROC))/Cost Center (1471780000 (RADIO BOSTON))

Total Cost \$5,000.00 USD
Net Amount \$5,000.00 USD

Need-by Date 9/7/20
Deliver To Erika Lonardo - Floor 1, Room #120

Requester Erika Lonardo
Is Team Requisition No

Company Code TRBU (Trustees of Boston Univ)
ERP Reference ID 1001071460

Hide advanced options

6 View the **Approval Flow**. Add additional approvers by clicking on the approval line.

7 Type in any necessary **Comments** and click **Add**. If necessary, click **Share with supplier**.

8 Scroll down to view the header information including **Shipping** and **Accounting** information.

Approval via Guided BUYing

Approval Process via Guided BUYing: Scroll down to expand line item detail including supplier information, accounting, and shipping.

Quantity
Price
Net Amount

| | | | | |
|--|--|----|--------------|----------------|
| | Relocating Office | 20 | \$250.00 USD | \$5,000.00 USD |
| | 0010005020 (ABC Moving Services, Inc.) | | | |
| | Unit of Measure | | | Gross Amount ⓘ |
| | Hour | | | \$5,000.00 USD |

| | |
|--|--|
| Name | Supplier |
| Relocating Office | 0010005020 (ABC Moving Services, Inc.) |
| Description | Supplier Location |
| We are looking to hire ABC Moving Services to relocate a faculty member's office to another building. We would like to engage ABC from 9/5/20-10/5/20. | ABC Moving Services, Inc. |
| Supplier Part Number | Supplier Auxiliary Part ID |

9 Scroll down to view each line item detail.

10 Click **Accounting** to expand details.

Click arrow to expand **Shipping** section. Review delivery address.

11 Note if a non-BU address has been added. Requisitioners are required to enter a comment noting a non-BU address has been added for your approval.

Accounting
Cost Center (1020400003 (SOURCING & PROC))Cost Center (1471780000 (RADIO BOSTON))

| | | | | | | | | | | | |
|--|--|--------------------|---|-----------------------|----------------|-----------------------|--|--|--------------------|----------------|-----------------------|
| Account Type | Bill To | | | | | | | | | | |
| Expense | TRBU (Boston University) | | | | | | | | | | |
| | 25 Buick Street Boston, MA 02215 United States | | | | | | | | | | |
| Account Assignment | | | | | | | | | | | |
| K (Cost center) | | | | | | | | | | | |
| <table style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="width: 15%;"></td> <td style="width: 25%;">Cost Center (1471780000 (RADIO BOSTON))</td> <td style="width: 15%;">Percentage 50.00 %</td> <td style="width: 15%;">Quantity 10.00</td> <td style="width: 30%;">Amount \$2,500.00 USD</td> </tr> <tr> <td></td> <td>Cost Center (1020400003 (SOURCING & PROC))</td> <td>Percentage 50.00 %</td> <td>Quantity 10.00</td> <td>Amount \$2,500.00 USD</td> </tr> </table> | | | Cost Center (1471780000 (RADIO BOSTON)) | Percentage 50.00 % | Quantity 10.00 | Amount \$2,500.00 USD | | Cost Center (1020400003 (SOURCING & PROC)) | Percentage 50.00 % | Quantity 10.00 | Amount \$2,500.00 USD |
| | Cost Center (1471780000 (RADIO BOSTON)) | Percentage 50.00 % | Quantity 10.00 | Amount \$2,500.00 USD | | | | | | | |
| | Cost Center (1020400003 (SOURCING & PROC)) | Percentage 50.00 % | Quantity 10.00 | Amount \$2,500.00 USD | | | | | | | |
| Shipping | | | | | | | | | | | |
| ShipTo(Plant) (ADBuyer405112246 (Erika Lonardo)) | | | | | | | | | | | |
| ShipTo(Plant) | Deliver To | | | | | | | | | | |
| ADBuyer405112246 (Erika Lonardo) | Erika Lonardo - Floor 1, Room #120 | | | | | | | | | | |
| 250 Commonwealth Avenue Boston, MA 02116 United States | | | | | | | | | | | |
| Need-by Date | Purchase Group | | | | | | | | | | |
| 9/7/20 | 103 (PGroup 103) | | | | | | | | | | |

| | |
|--|------------------------------------|
| ShipTo(Plant) | Deliver To |
| ADBuyer405112246 (Erika Lonardo) | Erika Lonardo - Floor 1, Room #120 |
| 250 Commonwealth Avenue Boston, MA 02116 United States | |



Note: Items associated with a contract will be noted in the line item detail. In this example, the item is associated with a contract BPO20.

Approval via Guided BUying

Review details in the Others tab which includes payment terms. The History section includes approvals and changes to the PR.

Relocating Office
Request details / PR2616

Total Cost \$5,000.00 USD [Approve] [Deny] ...

> Comments
> Attachments
12 > Others

| | |
|--|-------------------------------------|
| Commodity Code | Material Group |
| SERVICES-MOVING | 78101804 (Relocation Services) |
| Item Category | Payment Terms |
| Material | Z060 - Net 60 days |
| Incoterms Code (no value) | Incoterms Location Not specified |
| Purch Org 1000 (Sourcing & Procurement) | Line Item Text Not specified |
| Contract (no value) | Order Type Amount Based |

12 Scroll down and click the **Others** tab to review other information such as **Commodity Code, Payment Terms, Item Category**, etc.

Relocating Office
Request details / PR2616

Total Cost \$5,000.00 USD [Approve] [Deny] ...

> Comments
> Attachments
> Others

13 History

| Date | Real User | User | Action | Summary |
|------------------|---------------|---------------|---|---|
| 7/16/20, 2:21 PM | Erika Lonardo | Erika Lonardo | Submitted | PR2616 submitted for approval. |
| 7/16/20, 2:21 PM | Erika Lonardo | Erika Lonardo | Requisition sent to the external system | PR2616: Requisition was successfully sent to the external system. ERP reference number: 1001071460. |

13 Scroll down to view **History** section. You can view complete history of the PR including approvals and changes.



Note: Commodity Code is replacing Product Category.

Approval via Guided BUying

Once you have reviewed and made any required changes, approve or deny the PR. Follow steps 14A to approve the PR or 14B to deny.

Relocating Office
Request details / PR2616
Total Cost \$5,000.00 USD

Submitted

Approval Flow

Request

DAWNA JOHNSON

DHRUBAN (SSP)...

Comments

Write your comment...

Share with supplier

Add

Approve Deny

14A Click **Approve** in the top right corner.

Enter a comment and click **Approve**.

Next Steps:

- The PR will move to the next approver in the **Approval Flow** or a PO will be generated and sent to the supplier.
- Navigate to **Your Approvals > Recent Approvals** to see approved or denied PRs.

Approve request

Enter an optional comment for the requester.

PR Approved EL.

Approve Cancel

Approval via Guided BUying

To deny the request and send it back to the requisitioner for changes, click **Deny**.

Relocating Office
Request details / PR2616
Total Cost \$5,000.00 USD
Approve Deny

Submitted

Approval Flow *Click on the line to add approvers*

Request DAWNA JOHNSON DHRUBAN (SSP)... Approved

Comments
Write your comment...
 Share with supplier

Deny request

Explain to the requester and other approvers why you're denying this request.

Please provide more information on the reason for engaging this supplier. Denying for insufficient information.

Deny Cancel

14B Deny in the top right corner.

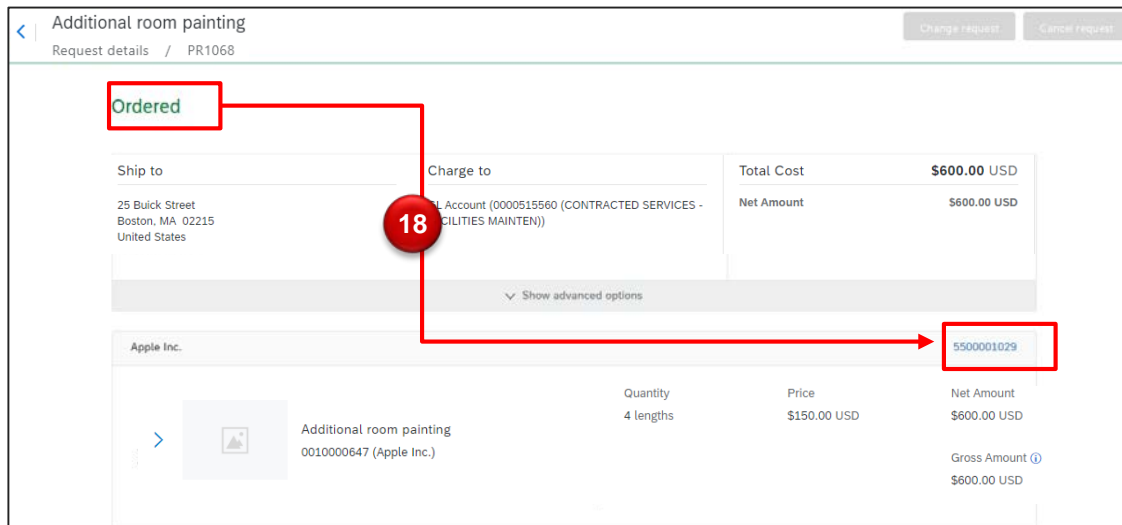
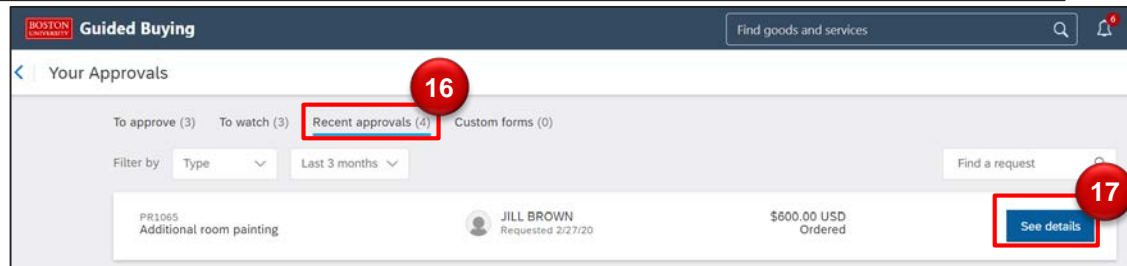
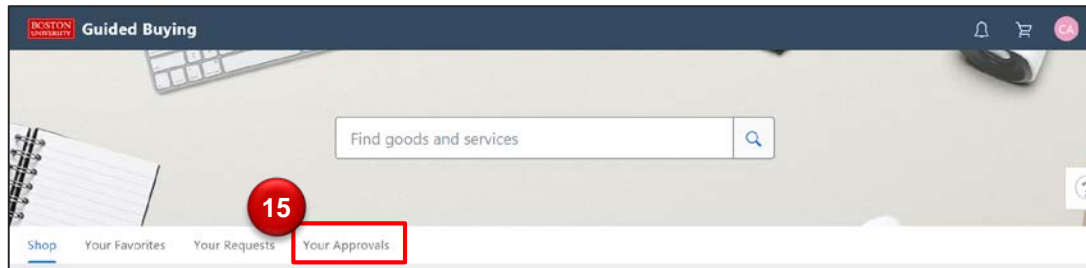
Enter a comment and click **Deny**.

Next Steps:

- The PR will be sent back to the requisitioner to make requested changes.
- Navigate to **Your Approvals > Recent Approvals** to see approved or denied PRs.

Approval via Guided BUying

After a PR has been approved or denied it will display under the **Recent approvals** section under the **Your Approvals** tab.



15 Click the **Your Approvals** tab on the **Guided BUying** homepage.

16 Navigate to **Recent approvals**.

17 Click **See Details** next to the PR.

18 This PR required no further approvals and has changed to a status of **Ordering**. A PO has been generated and sent to the supplier. You will see the PO number above the Net Amount; it begins with a 55.