

*Purchasing
Services*

Approving Via E-mail



WSSU

Winston Salem State University

July, 2015

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*Purchasing
Services*

***E-mail Approval With An
Approval Code***

1. An e-mail will be sent indicating that a requisition is awaiting your approval.


 Fri 8/7/2015 12:06 PM
 purchasingservices@wssu.edu
New Pending Approval for Requisition# 64979399
 To: Valentine, Jeanette

Purchasing - Jeanette Approval Request for Requisition# 64979399

Dear Jeanette Valentine,

The requisition listed below has been submitted for your approval.

Summary

Folder: Purchasing - Jeanette
 Prepared by: Marion Roberts
 Cart Name: Music Leggins
 Requisition No.: 64979399
 Priority: Normal
 No. of line items: 2

TOTAL: 300.00 USD

Details

Fruhauf Uniforms, Inc

Item 1 (Non Catalog Item)
 Description: Drum Major Leggins
 Catalog Number: 7142014
 Quantity: 5
 Unit Price: 54.85 USD
 Ext. Price: 274.25 USD
 Size/Packaging: EA
 Taxable: No
 Capital Expense: No
 Commodity Code: 53102401

Item 2 (Non Catalog Item)
 Description: Shipping
 Catalog Number: 00000
 Quantity: 1
 Unit Price: 25.75 USD
 Ext. Price: 25.75 USD
 Size/Packaging: EA
 Taxable: No
 Capital Expense: No
 Commodity Code: 24112502

TOTAL: 300.00 USD

Accounting Codes

Fund: 314002 - BAF WSSU Band
 Organization: 30320 - Band
 Program: 207
 Account: 929000 - Other Supplies(L4)

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

Additional Information

Summary Details
 Standing Order: No
 Bid: No
 Comments: (0)

Other Possible Approvers
 Alan Ireland
 Andrea Thompson

Shipping Address
 Attn: Michael Kragster
 Phone: +1 (336) 750-2538
 Room: 112 Fine Arts Building
 Winston-Salem State University
 601 S Martin Luther King Jr. Dr
 Carolina Hall
 Winston-Salem, NC 27110
 United States

[Click here to view the document in your organization's site.](#)

If you have any questions with regard to reviewing/approving this requisition, please contact your SelectSite Support Team.

2. After reviewing the e-mail click on the “Take Action” button.

3. The following dialog box should display in a browser window.

****If your name is not beside the “Approver” field please DO NOT take action upon the e-mail and contact the Process Improvement department at ext. 2585 with the error.****

4. Select an action to take and input any comments if applicable.

*****NOTE: Only one action can be taken through the e-mail approval process. For example, if “Assign to myself” action was taken via e-mail in order to approve, reject, or return to requisitioner the approver must login to SciQuest. *****

Assign to myself: Used when the approver would like to review the selected document at a later time and would not want others to take action upon. This action disables others from taking action upon the document.

5. Type in your approval code, Click “Submit”.

6. After approving this requisition, the following dialog box should appear to confirm the action you wish to take.

The image shows two overlapping windows. On the left is a form titled "Winston Salem State" with the following fields: Requisition (64979399), Status (Pending), Shopper (Marion Roberts), and Approver (Jeanette Valentine). Below these is a "Select an action:" section with radio buttons for "Approve" (selected), "Assign to myself", "Reject/Cancel", and "Return to Requisitioner". There is also a "Comment (Optional):" field with the text "Please delete line 2" and a "Submit" button. On the right is a "Message from webpage" dialog box with a question mark icon and the text "Are you sure you want to approve this?". It has "OK" and "Cancel" buttons. An arrow points from the "Approve" radio button in the form to the "OK" button in the dialog box.

7. Click "OK".

8. The confirmation dialog box will appear to confirm what action has been taken.

A confirmation message box with a red border and the title "Approve successful". It contains the following information: Requisition 64979399, Shopper Marion Roberts, and Approver Jeanette Valentine.



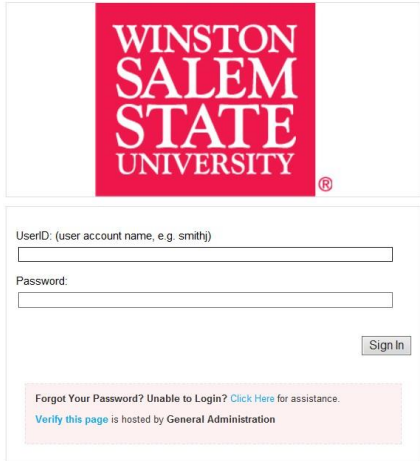
*Purchasing
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Logging into E-Procurement

<https://usertest.sciquest.com/apps/Router/SAMLAAuth/WinstonSalemState>

(NOTE: TEST URL LINK)



WINSTON
SALEM
STATE
UNIVERSITY

UserID: (user account name, e.g. smithj)

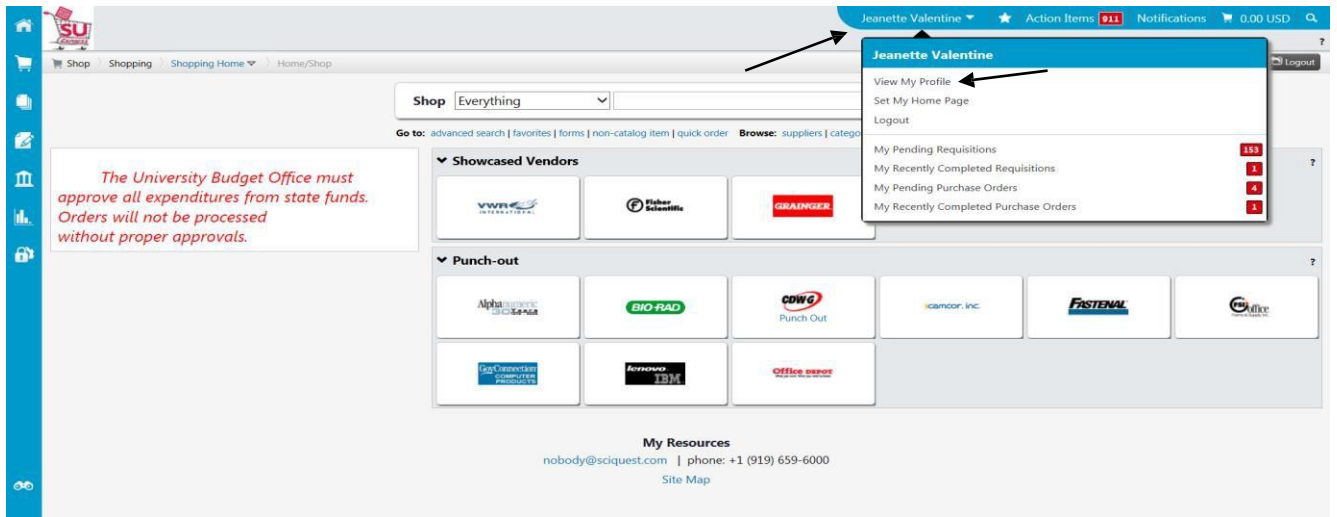
Password:

Sign In

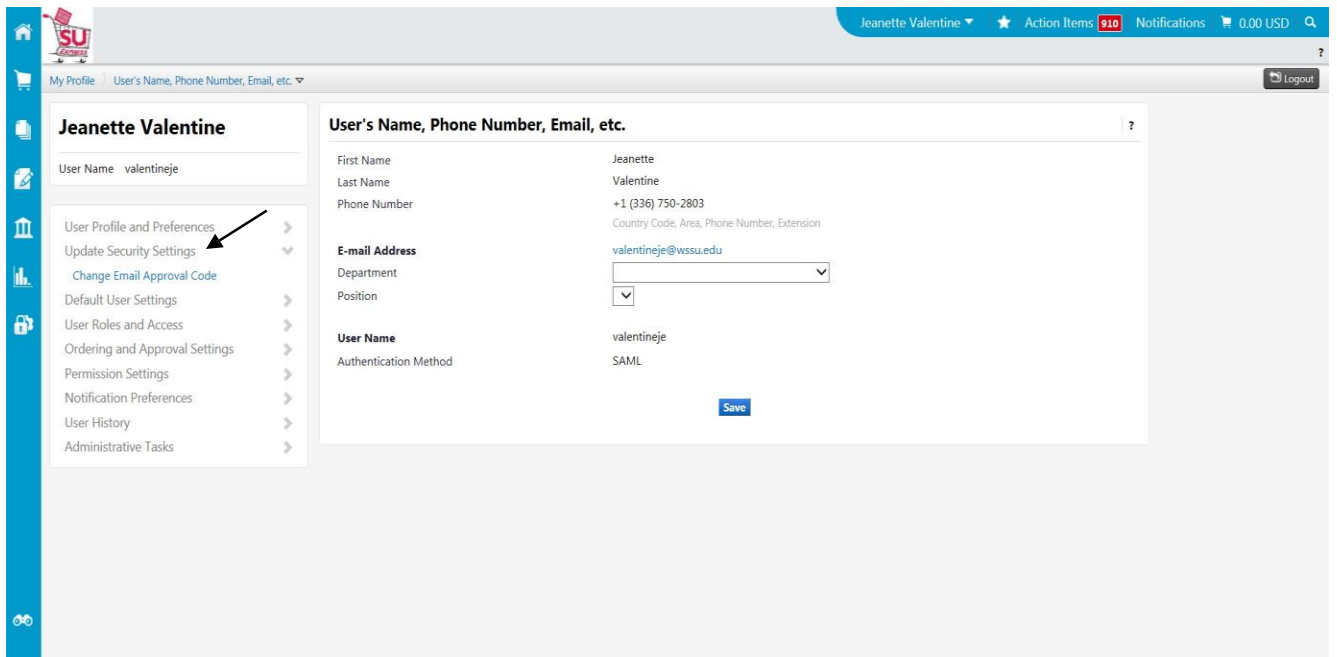
Forgot Your Password? Unable to Login? [Click Here](#) for assistance.
Verify this page is hosted by General Administration

- Input User name example: valentineje (lowercase)
- Password (Network Password)
- Sign In

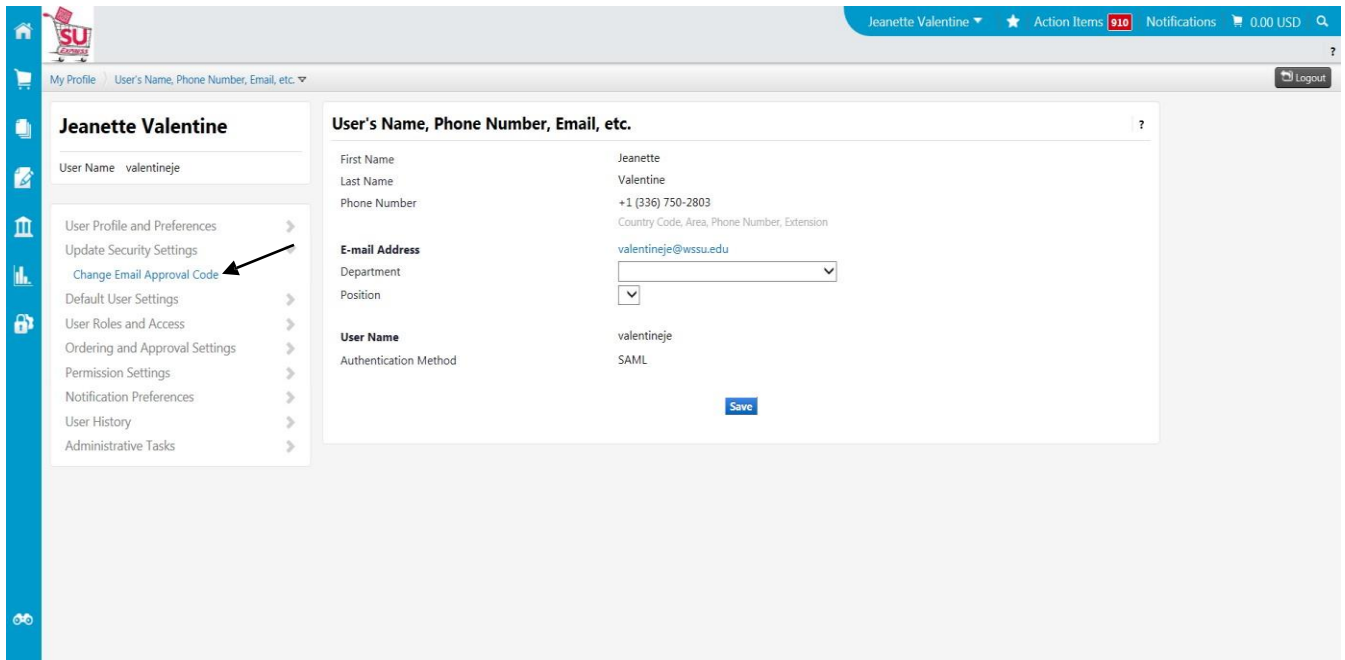
1. Click on your name locate at the top of your homepage and select “View My Profile” from the drop down menu.



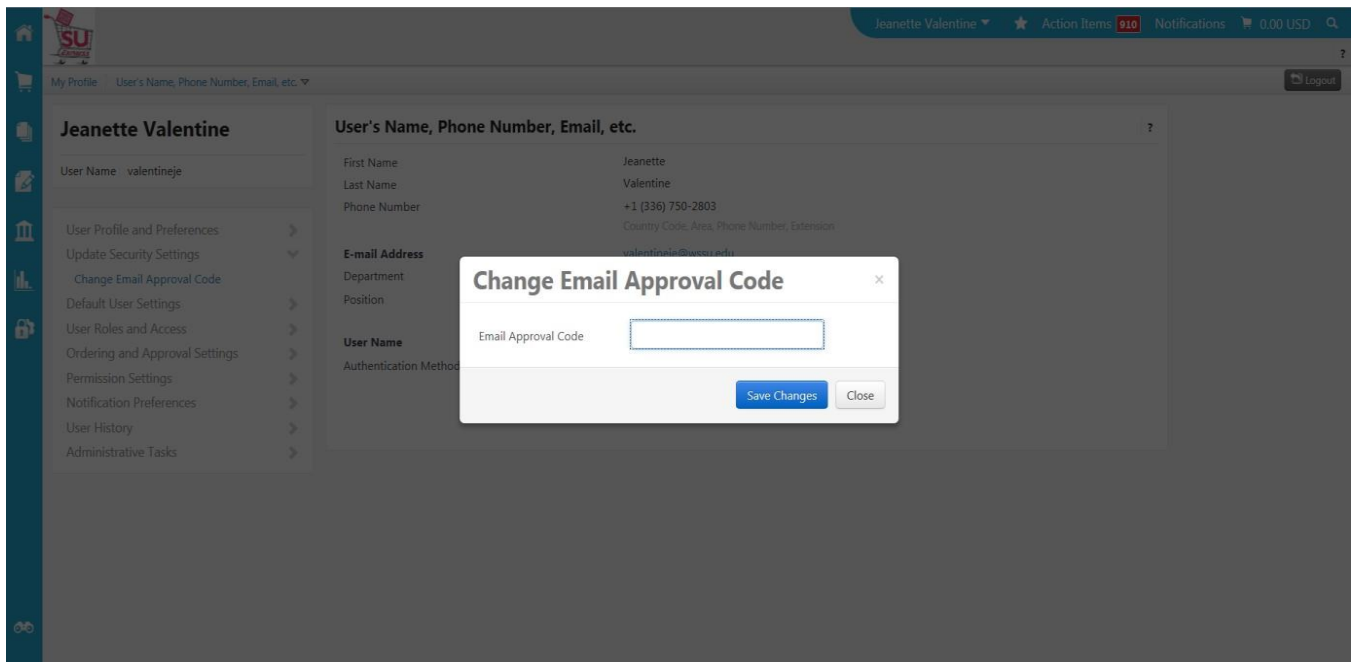
2. On the left side of the screen click on “Update Security Settings”.



Click “Change Email Approval Settings”



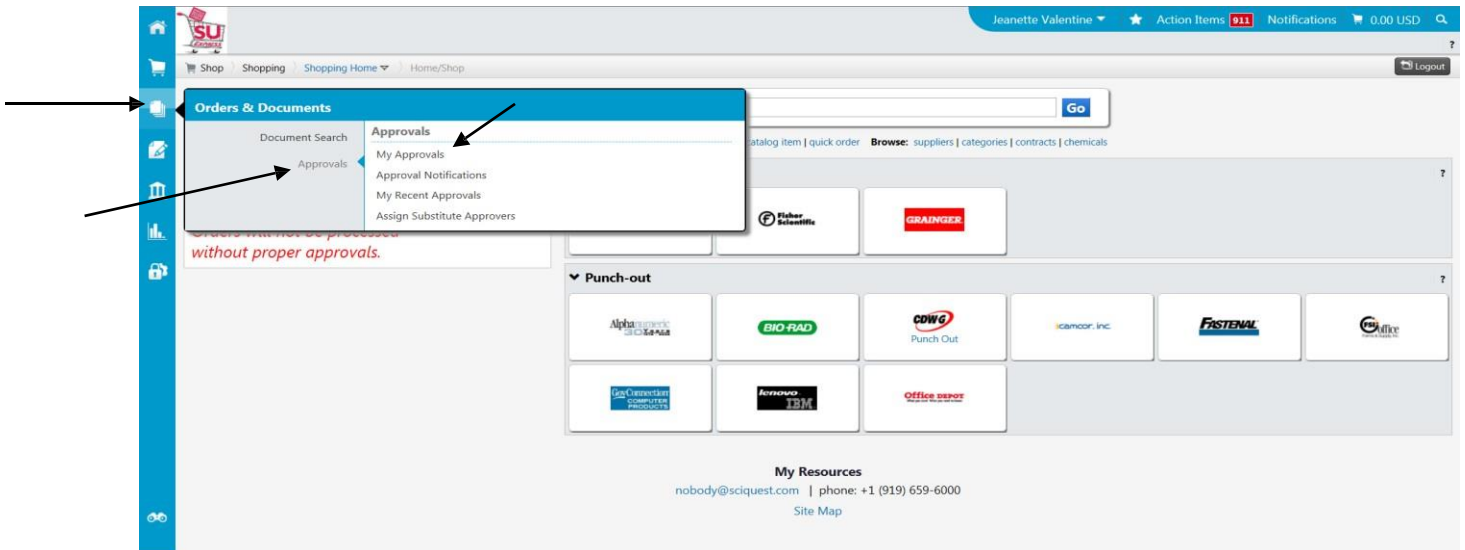
Type your approval code. ***Your approval code must be at least 4 digits long***.



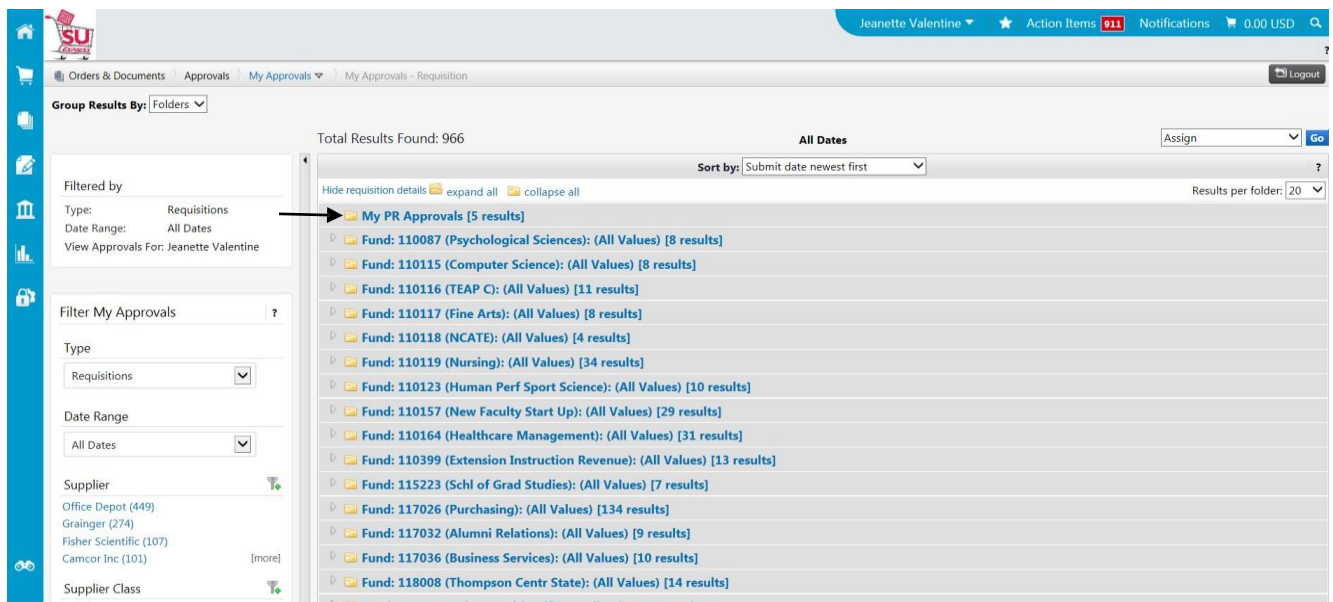
3. Click “Save Changes”.

Approving Via SU-Express

1. Hover over the third Icon on the left (Orders & Documents) from approvals to click “my approvals”.



2. Click on the appropriate fund folder to view requisitions.



3. The folder opens to reveal requisitions awaiting your approval. Click a requisition # to view the requisition.

Requisition Name	No. of line items	Office Depot	Folders
2013-09-12 jacksont 14	4	1031705	694 Days in folder [Fund: 117032 (Alumni Relations): (All Values)]
2013-09-12 jacksont 13	4	1031704	0 Days in folder [My PR Approvals] 694 Days in folder [Fund: 117032 (Alumni Relations): (All Values)]
2013-09-12 jacksont 12	4	1031703	0 Days in folder [My PR Approvals] 694 Days in folder [Fund: 117032 (Alumni Relations): (All Values)]
2013-09-12 jacksont 11	3	1031703	0 Days in folder [My PR Approvals] 694 Days in folder [Fund: 117032 (Alumni Relations): (All Values)]

4. Click the drop down arrow next to available actions and click “Assign to myself”.

Note – from the drop down in available actions, you can also reject or return the requisition to the requisitioner with comments.

Requisition Number(s) 1031706

Folder: Fund: 117032 (Alumni Relations): (All Values)

Available Actions: Assign to myself

General	Shipping	Billing
Status Pending Budget Mgr Approval Submitted 9/12/2013 7:56 AM Cart Name 2013-09-12 jacksont 14 Description no value Priority Normal Prepared by Timothy Jackson III Standing Order X PO Class Code no value	Ship To Attn: Timothy Jackson III Phone: +1 (336) 750-2933 Room: 100 Winston-Salem State University 601 S Martin Luther King Jr. Dr Old Maintenance Bldg/Cen Receiv. Winston-Salem, NC 27110 United States Delivery Options Expedite X Ship Via Best Carrier-Best Way Requested Delivery Date no value	Bill To Accounts Payable 601 S. Martin Luther King Jr. Dr Winston-Salem, NC 27110 United States Credit Card Info No credit card has been assigned. Billing Options Accounting Date no value

5. After assigning the requisition to yourself, review the entire requisition, if all is well you can approve by clicking the “go” box next to available actions: Approve/Complete & Show Next. If you have other requisitions to approve, the next one will appear.

The screenshot shows a web application interface for requisition management. At the top, there is a navigation bar with the user's name 'Jeanette Valentine', 'Action Items 911', 'Notifications', and '0.00 USD'. Below this is a breadcrumb trail: 'Orders & Documents > Approvals > My Approvals > Summary - Requisition 1187705'. A search bar on the right contains 'Requisition Number(s) 1187705'. A dropdown menu shows '1 of 10 Results' and 'Folder: Fund: 117036 (Business Services): (All Values)'. An arrow points to the 'Available Actions: Approve/Complete & Show Next' dropdown, with a 'Go' button next to it. Below this is a tabbed interface with 'Summary' selected. The main content area is divided into three columns: 'General', 'Shipping', and 'Billing'. Each column has an 'edit' button. The 'General' column shows 'Status: Pending', 'Submitted: 7/29/2014 9:13 AM', 'Cart Name: 2014-07-29 Carpet and Glue for Eller Hall-Natisha', 'Description: no value', 'Priority: Normal', 'Prepared by: Natisha Melchor', 'Standing Order: X', and 'PO Class Code: no value'. The 'Shipping' column shows 'Ship To: Attn: Natisha Melchor, Phone: +1 (336) 750-8904, Room: 113, Winston-Salem State University, 601 S Martin Luther King Jr. Dr, Eller Hall, Winston-Salem, NC 27110, United States', and 'Delivery Options: Expedite: X, Ship Via: Best Carrier-Best Way, Requested Delivery Date: no value'. The 'Billing' column shows 'Bill To: Accounts Payable, 601 S. Martin Luther King Jr. Dr, Winston-Salem, NC 27110, United States', 'Credit Card Info: No credit card has been assigned.', and 'Billing Options: Accounting Date: no value'. At the bottom, there is an 'Accounting Codes' section.