# APPROVER GUIDE

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Getting Started

Signing On

Once you have been set-up as a user/approver in Western Marketplace, you will be able to access the application through myWestern. The Western Marketplace link appears under Employee Tab then Technology Tools.

If you receive an email notice from noreply@esmspolutions.com with a link asking you to sign on to easyPurchase, the link will take to the Western Marketplace Resources page. ESM Solutions is our 3rd party platform provider and system generated emails refer to the Western Marketplace as easyPurchase.

Click here to log in.

Western Marketplace login

Western Marketplace References
- FAQ's
- Vendor Return Guidelines
- Western Marketplace Access Form

Reference Guides
- Quick Reference - Non-Catalog Orders
- Quick Reference - Shop/Approve/Receive
- Approver Guide
- Commodity Codes Guide
- Receiving Guide
- Running Reports
- User Guide
- Using Order Summary and Extracts
Be sure and check your clutter or “Other” folder in Outlook. Some of the notification emails may be sent to your clutter folder.

A third link to access the Marketplace is also available on the Business Services website.

When you go to log into the Marketplace if you see a screen that looks similar to the photo below, **DO NOT ATTEMPT** to log on to the Western Marketplace from this screen. Your email and password will not work. You must access the Western Marketplace through a single sign on using your Western Universal log on name and password.
Below is the sample landing Page:

**Western Marketplace**

Below is the sample landing Page:

![Sample Landing Page](image)

**Pop-up Blockers**

- Ensure your Pop-Up Blockers are turned off. Check with your department IT for guidance on this.

- ATUS recommends that Internet Explorer (IE 11 or above) and for Apple users, Safari for OS X be used. Edge does not work.

**Contacts**

- **Purchasing**
  - System Administrator: Susan Banton
  - Main Line: 650-3340

- **Back-up Administrator**
  - Heidi Ling
  - Main Line: 650-2430

- **Forms**
  - ESM.Support@wwu.edu
  - Main Line: 650-4220

**Processing Orders that Need Approval**

**Checking Order Information**

When an order is submitted to you for approval, you can perform the following actions:

- **Approve** – No changes are made and the order is sent to the Supplier or, if needed, a secondary approver based upon business rules and workflow.

- **Hold** – If an order is on hold, it requires an action of some type. The selection criteria allows you to sort or look for orders on hold, **but there is no automatic notice or reminder after a defined period so this function is not helpful.**

- **Reject** – The order is to be returned to the requestor who originated the transaction. If changes are made on the transaction, the order will need to be rejected, it cannot be approved and the approver should enter a reason for the return.

At a minimum Approvers should check:
1. Order Type
2. Commodity Code
3. FOAPAL or Accounting Segment (AKA account code)
4. Is this purchase appropriate per State law, University guidelines or Grant provisions?
5. Budget Status (Do you want to spend this money, do you want to order this many items.)

**Tip:** If the word edit or view appears by Internal Note, it is recommended that you read the note. It is a recommended practice to shoppers to write a note to their approvers regarding the order. To read a note you click the edit or view blue hyperlink.

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**Step 1:** Upon logging into the Western Marketplace, you are at the Shop or Landing page.

**Step 2:** Click into the Approve tab
If the transaction you wish to approve is not visible when you log in, filter by using the drop down menu in the selection box. Use “All” or “Active.” You may enter the transaction # or PO # and then click “GO”. Once you choose the selection, the “GO” button turns yellow. Select the GO button and the specific transaction will appear.

**Step 3:** You may approve at the header level without looking at the detail by clicking the Green Approve button.

The alternative is to review the detail, then approve. To see the line item detail, click on the small blue triangle.

This opens up the detail on the various lines and ship to areas. Notice, once you click the arrow it is now pointing downwards.

At this line level detail level, you may change the commodity code, the accounting detail on a line item and you may change the quantity ordered. If you do make changes you will need to send it back to the originator so they may request approval again. Workflow is calculated when the cart originator requests approval. Workflow may not be “re-calculated” without being returned to the originator.
To change the accounting Segment you hit details.

When you get to this page, you would select check the delete box, then the Blue Update button.

The System will ask you if you are sure you want to delete this account. If you say OK, the system will take you back to front page of the order. You will then need to hit details and enter the correct accounting segment.

If any changes are made to the order, the Update button will appear in Blue. **If you click Update, the transaction can only then be “rejected” (returned) and you must then hit reject.** The order will then be returned to the originator.

If you do not want to update or change any entry, refresh your screen (F5) and the approve/hold/reject buttons will be available. If no changes are needed, click Approve to complete.
If you have made changes the screen will only allow you to place the order on Hold or Reject (Return) the order:

Multiple Approvals Option

It is likely for an approver to be in more than one routing workflow at once. This happens if the workflow requires approval for an additional condition. For example, if an order is over a certain dollar threshold, the approver has the choice to approve the first time they log on. If the approver clicks “Multiple”, the approval routes to the approver multiple times. Click “Once” if you want to approve the order one time instead of taking turns after each approval routing.
Forward

An approver may forward an order to another person who is not in the normal work flow routing. The person you wish to forward the order to must have been set up in the Marketplace with Approval privileges.

If a person wishes to forward the order to another for approval they go to the drop down under Next Step.

Select forward from the drop down menu. Notice, the buttons change. Approve becomes Forward.

Once you select forward the following appears:

You select the name of the person you wish to forward the order to and hit continue. The person will receive an email notification from noreply@esmsolutions.com. This person must approve the order before it can be submitted to the supplier.
Auto Reject (or My Approval Button is Grayed Out)

Auto Reject means that rejecting the order is the only action an Approver can take. This happens when an approver makes corrections to the transaction either on the header or line item detail level and hits update. If you start making changes and change your mind, refresh the screen before clicking Update.

A best practice would be to reject an order and state why in the notes sections before sending it back to the originator to make changes.

1. After the approver makes changes and clicks the blue Update button, the Next Step area changes to “Approve or Reject” and the Approve button is grayed out because of the auto reject function. You cannot approve a transaction after making changes.
2. At this point, the user must either reject the transaction or hold the transaction.
3. If the approver makes changes, they should explain what changes were made in the Notes field so the originator knows why the order was returned.
4. Once the approver updates the Notes field, the transaction is placed back in the originator’s Checkout tab for further action by the originator or requestor.

Ad Hoc Review

Western Marketplace contains many standard workflows based upon predefined requirements. If a user wishes to send an Ad Hoc (information) notification, click Ad Hoc Review under Next Step and then select
the individual. If the individual you select has email notifications turned off, they must be personally notified as they will be unaware a transaction was sent to them.

There are two parts to Ad Hoc Review – send and respond. The user sends the Ad Hoc notice and the recipient responds.

**Sending an Ad Hoc Review**

Once a user selects Ad Hoc Review under next steps, a blue button labeled Ad Hoc appears. Click this button and a screen comes up to select the individual to receive the notification.

Search here:

The individual receiving the Ad Hoc notice finds the transaction by searching under Ad Hoc or by the transaction #.

**Responding to an Ad Hoc Review**

To respond to an Ad Hoc Review notice, the user receiving the Ad Hoc Review notice goes to Next Step, clicks Respond from the drop down menu and then Select > Respond button.

A screen will appear asking if you wish to respond to the Ad Hoc review.
If yes is selected, a text box appears, and a message can then be typed in the box.

Once the text box is closed, the transaction will indicate that there is now an internal note by the word “view” placed next to the internal notes area of the header screen.

When the view button is selected, the internal Ad Hoc note is available for review.
Approver Delegation (or when you will be absent from Campus for a length of time.)

Western Marketplace allows approvers to log on from any location that has internet connectivity with the ability to log on to My Western. You do not need to be on campus to use the Marketplace. If you will be away from the campus for a lengthy time without internet access you may delegate someone to approve your orders while you are gone.

To select a delegate you go to your name in the upper right hand corner and select profile.

The profile screen appears

You select your delegate and make it active. When you return you then make the delegate inactive.

University policy does not allow for a permanent delegation of an Approver’s authority so you will need to remember to change this when you return.