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 Technology Tools.

A link will also be available on the Business Services website.
A third link, along with reference materials, is also available on the Gateway to E-Procurement page.

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 myWestern.

Pop-up Blockers

Pop-up blockers must be disabled.

Contacts

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchasing</td>
<td>Main Line</td>
<td>650-3340</td>
</tr>
<tr>
<td>System Administrator</td>
<td>Susan Banton</td>
<td>650-2430</td>
</tr>
<tr>
<td>Back-up Administrator</td>
<td>Sharon Colman</td>
<td>650-3479</td>
</tr>
<tr>
<td>Forms</td>
<td><a href="mailto:ESM.Support@wwu.edu">ESM.Support@wwu.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

If Purchasing or a System Administrator are not available during an emergency, please contact ESM Solutions Support, (877) 969-7246 or support@esmsolutions.com.
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 returned to the requestor who originated the transaction. If changes are made on the transaction, the order is automatically “rejected” and the approver should enter a reason for the return.

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

**Step 2:** Select 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.

You may also 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 header will appear.
Step 3: You may approve at the header level without looking at the detail by clicking the 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, the arrow by the blue triangle is now pointing downwards.

At this level, you can approve or make changes to the line item and ship to address. If changes are made, the Update button will appear in Blue. If you click Update, the transaction is automatically “rejected” and returned to the originator. If no changes are needed, click Approve to complete.
Multiply 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 “Once”, the approval returns to them after the other workflow approvals are processed.

Auto Reject

Auto Reject 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 must 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 Checkout tab for further action by the originator.
Ad Hoc Review

Western Marketplace contains many standard workflows based upon predefined requirements. If a user wishes to send an Ad Hoc 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.
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.