Approver Guide

This guide will review how to review and approve requisitions

Contents
Approver Guide 1
Logging In 2
Approval Process 2
Approval Notifications 2
Email Notifications 2
Notifications in CTW OneSource 4
Approval Page 5
Requisition Approval Overview 5
Approve/Decline Window 5
Unavailability Settings 6
Requisition View 7
Actions 7
Approval History 8
Comments on Requisitions 9
CTW OneSource – Approver Guide

Logging In
1. Open your web browser.
2. Log into Camel Web intranet site and find the link to CTW OneSource
   OR
5. Enter your Connecticut College CTW OneSource username and password and login.
6. Your CTW OneSource home page will appear.

If you experience any issues logging in, please contact eprocurement@conncoll.edu.

Approval Process

Once buyers create requisitions, they are routed for approval based on the Connecticut College FOAPAL information and any special Accounts or Commodity’s in the requisition. Email notices are sent to the approvers as their actions are required. If action is not taken within 24 hours from the first notice, a reminder email will be sent. If no action is taken within 72 hours 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 72 hours have passed, the requisition will wait for the approver to take action.

The approval routing will be based on FOAPAL string 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 Banner. 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 ctw_onesource@conncoll.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.
Approval Required

Requisition R0000067 (Carolina Biological Supply Company) for Lynne McCue

<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># 10 Sell Sieve</td>
<td>Carolina Biological Supply Company</td>
<td>1-100000-30053-71200--</td>
<td>1</td>
<td>$10.25</td>
<td>(100.00%)</td>
<td>$10.25</td>
<td>$10.25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Subtotal</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$10.25</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Shipping</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>TOTAL</td>
<td>$10.25</td>
</tr>
</tbody>
</table>

Please login to approve or decline this requisition.

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

Requisition R0000079 (Carolina Biological Supply Company) for Lynne McCue: 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># 10 Sell Sieve</td>
<td>Carolina Biological Supply Company</td>
<td>1-100000-30053-71200--</td>
<td>1</td>
<td>$10.25</td>
<td>(100.00%)</td>
<td>$10.25</td>
<td>$10.25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Subtotal</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$10.25</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Shipping</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>TOTAL</td>
<td>$10.25</td>
</tr>
</tbody>
</table>
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 CTW 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 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 in your tasks with the requisition number, buyer’s name, supplier, order type, 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.

Approvals

Approve/Decline Window
The Approval button to the far right, next to the Actions button of the requisitions 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.
Unavailability Settings
To set yourself as unavailable and/or assign a proxy approver, click the Change Availability link to have the Change Availability window appear. 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 take action 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.

Approvals

⚠️ You are currently NOT available until 1/6/2019 11:59 PM and will not receive any approval requests.

✍️ 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 and Bill 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
- Connecticut College FOAPAL
  - Editing the Connecticut College FOAPAL may change the routing of the approval
  - When you edit any of the FOAPAL values, the budget check will be performed again to ensure that the buyer has the proper authority for the new FOAPAL in Banner.

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.
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 PO. The approval history is shown to anyone who can 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
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.

<table>
<thead>
<tr>
<th>Items</th>
<th>Approvals</th>
<th>Comments (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Add Comment »</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Christopher Rust (Connecticut College) commented - 12/7/2018 4:26 PM
Comments Go Here.