Purchase Approver Guide

The following guide covers all aspects of the Vroozi Financial Approver role in *Vroozi Purchase*. Based on your organization's requisition workflow there may be many approvers in the approval chain.

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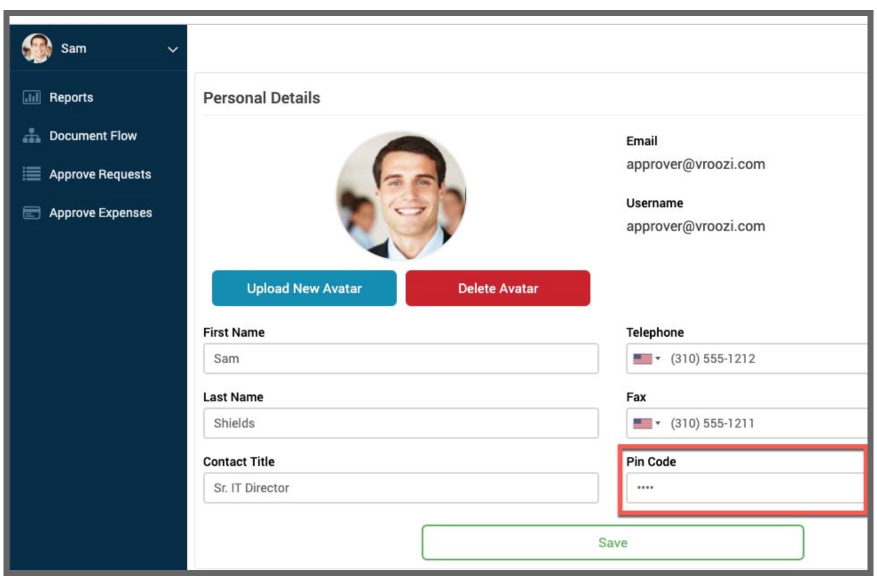
Profile

Personal Details

Upon logging in for the first time, all users should update their personal details. See your Getting Started Guide for further details.

Pin Code

For approvers the Pin Code field is particularly important. See the Approve on the Go! section for further details.



Approver Settings

Alternate Approver

Essentially acts a “clone” of the original approver

- Receives the ***same*** email notifications and can perform the ***same actions*** as the original
- “Inherits” the same attributes as the original, including approval levels and next approver
- Requisition and approval status show up in both user’s approval queues

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When to Use

- A long-term “back-up” or “second contact” for approvals
- Coverage for unplanned availability
- Minimizes maintenance activity

Need to Know

- This creates a scenario where both users can attempt the same action.
- Requisitions show up in both user’s queues.
- Changes affect only newly created documents, not previously existing ones.
- The settings are performed and visible only within the approver’s profile.

Out of Office

A temporary process that forwards emails/actions to another user

- Retains same roles/privileges as initially set for a limited time period
- Easy to set and control; automatically expires

Need to Know Info:

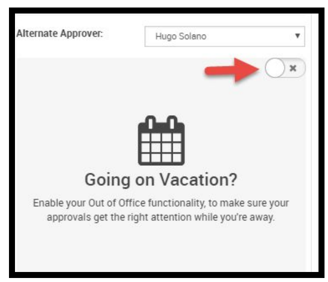
- ✓ Changes affect only newly created documents, not previously existing ones
- ✓ The settings are performed and visible only within your own

Next Steps

- ✓ ***Review*** your current approver levels/flow
    - *next approver; fallback approver; auto-forward time*
- ✓ ***Inform*** your Alternate or OOO approver of the setting
    - Alternate and OOO together are not compatible

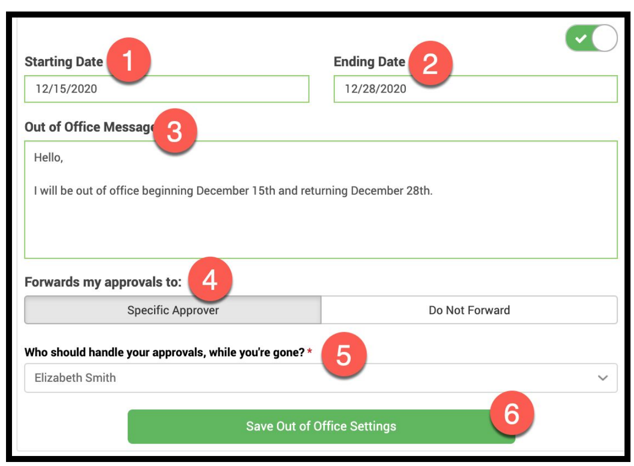
Enable Out of Office

**OOO is only available if activated by your Vroozi Administrator.*



To get started, open your User Profile and turn on the Vacation Responder "On". (shown on right) Once the Vacation Responder is activated, complete the following steps:

1. Enter the **Starting Date**
2. Enter the **Ending Date**
3. Complete Out of Office Message.



4. Select if you want your approvals forwarded. If a **Specific Approver** is selected, you will be prompted to select that person.
    - *Note: Selection of 'Do Not Forward' could be overwritten by any global approval queue settings defined by your administrator.

5. Select an Approver from the list of Approvers defined for your organization.

6. **‘Save Out Of Office Settings’** to confirm vacation changes

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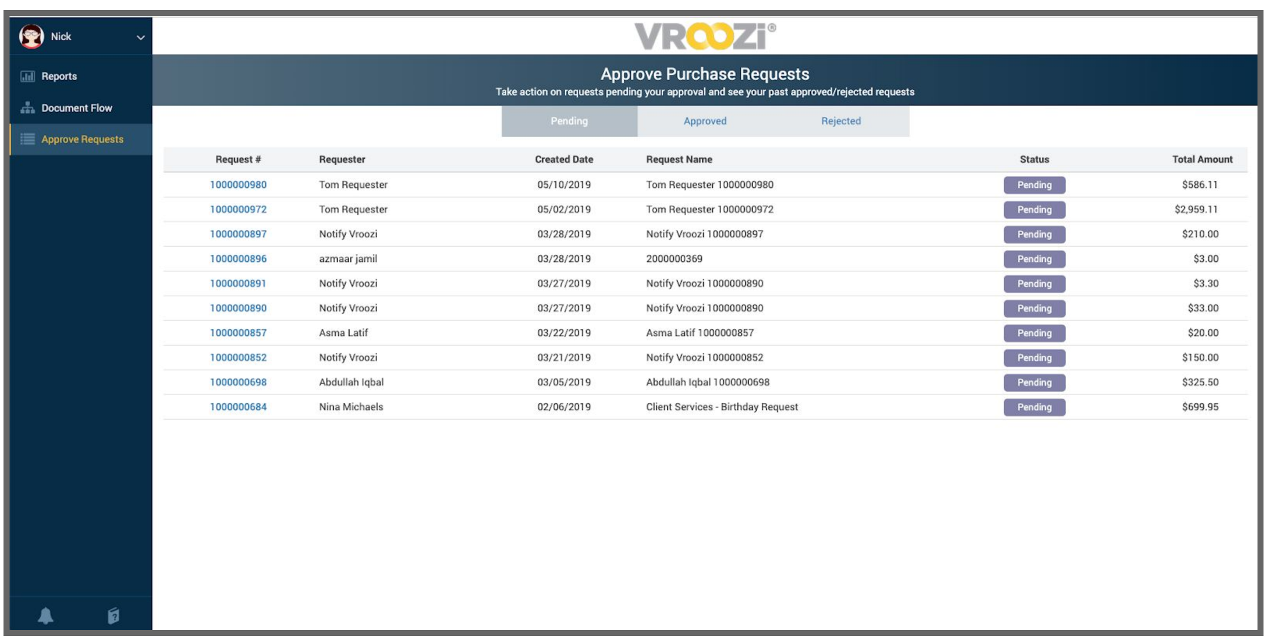
Navigation Panel

When logging in as a Financial Approver you are immediately redirected to the Pending tab within the ‘Approve Requests’ category in your Navigation Panel.. Here requests are divided into 3 statuses.

- **Pending:** Displays any requests requiring your response.
- **Approved:** The Approved tab indicates PRs you have approved. At which point the Purchase Request has converted to a PO or if using a staircase workflow, may be going through further approvals.
- **Rejected:** The 3rd tab houses requests that you have rejected.



Request #	Requester	Created Date	Request Name	Status	Total Amount
1000000980	Tom Requester	05/10/2019	Tom Requester 1000000980	Pending	$586.11
1000000972	Tom Requester	05/02/2019	Tom Requester 1000000972	Pending	$2,959.11
1000000897	Notify Vroozi	03/28/2019	Notify Vroozi 1000000897	Pending	$210.00
1000000896	azmaar jamil	03/28/2019	2000000369	Pending	$3.00
1000000891	Notify Vroozi	03/27/2019	Notify Vroozi 1000000890	Pending	$3.30
1000000890	Notify Vroozi	03/27/2019	Notify Vroozi 1000000890	Pending	$33.00
1000000857	Asma Latif	03/22/2019	Asma Latif 1000000857	Pending	$20.00
1000000852	Notify Vroozi	03/21/2019	Notify Vroozi 1000000852	Pending	$150.00
1000000698	Abdullah Iqbal	03/05/2019	Abdullah Iqbal 1000000698	Pending	$325.50
1000000684	Nina Michaels	02/06/2019	Client Services - Birthday Request	Pending	$699.95

Requisition Types

Within Vroozi, requesters may submit several types of requisitions.

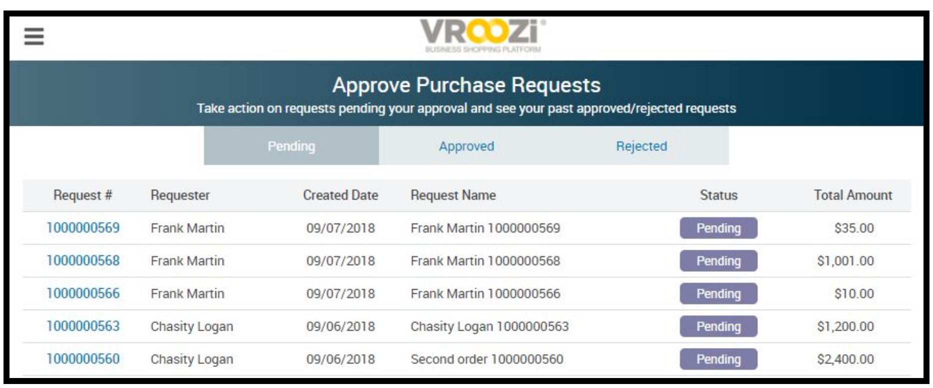
- **Catalog:** Includes both searchable Internal Catalogs and Punchout Catalog items and services.
- **Non-Catalog:** Free Text line items for vendor products or services that are not available in the catalogs.

  **Requisitions submitted may include both free text and catalog items.*

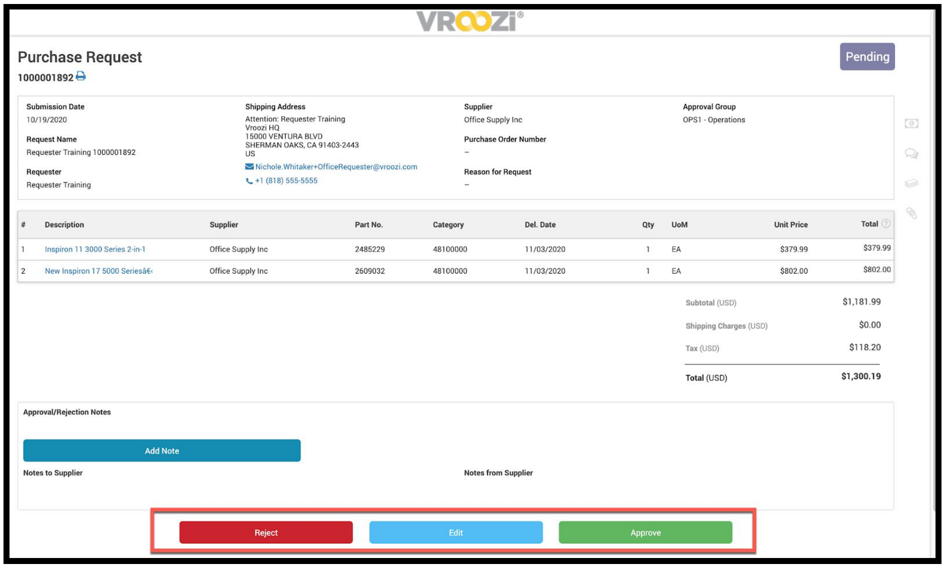
- **Blanket or "Limit":** A type *of Non-Catalog Free Text* request that consists of a requirement that will be delivered over a period of time.
- **Invoice Plan:** An automatic scheduled payment plan, like scheduled monthly lease payments or interval payments. This section outlines how to create an *Invoice Plan* by using the *Non-Catalog Free Text Request* functionality.

Approve from your Computer

1. Locate the request you would like to take action on.
2. At login you are directed to the Pending Menu as these are requests that require the action of the Approver

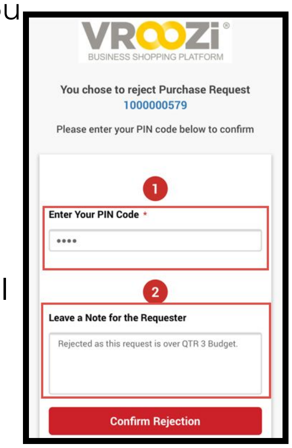


3. From here, select to 'Approve' or 'Reject' the Requisition.



Approve from your Mobile Device

Once your 4 digit Pin Code has been saved in your user Profile, you are ready to approve on the go!

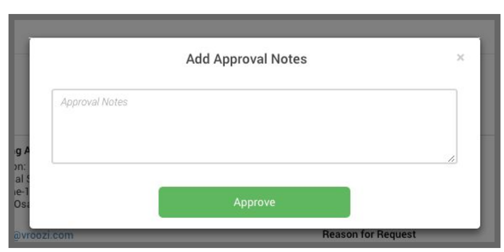


Approve or Reject: Tap/Click the "APPROVE" option. You will be directed to the Vroozi Authentication screen where you'll enter your PIN code and reason.

Once Rejection or Approval is complete a confirmation screen will appear.

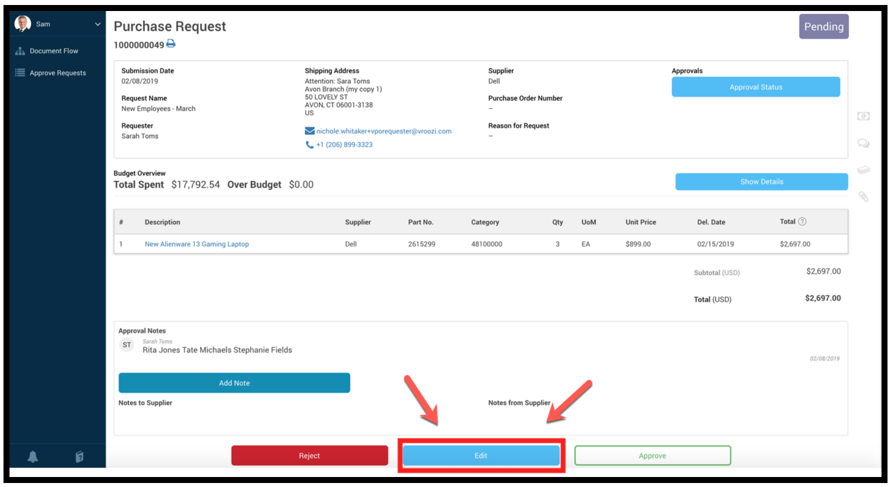
Approval Notes

Whether approving from your computer or on the go, approval or rejection of a requisition will prompt Approvers to provide a note. This is an optional field.



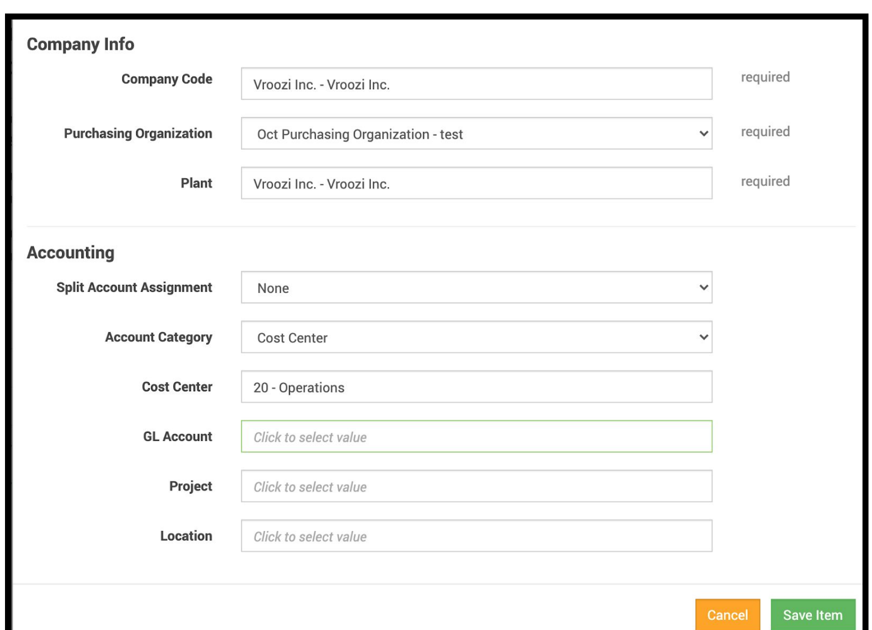
Edit a Requisition

Depending on individual permissions set up at user creation, approvers may have the ability to edit the accounting segments on a Requisition.



To edit the details of a request:

1. Click 'Edit' at the bottom of the Requisition view.
2. The information at the top of the request form includes the Request name, Supplier, Submitted date and Requester.
3. The price and any items related to the specific line items, services or goods cannot be edited. Only the line item accounting string is editable with the Approver editing permission. (See next page)



3. Select to *Save Item*.

Changes to these fields will not require the review of the Requester but may again be changed by another approver if part of a workflow. Or they could be adjusted at the AP level when approving the Purchase order that by that point has converted to an invoice.

If your organization does not allow changes at the approver level, adjustments are left to the AP team who again can make changes once the PR becomes converted to an Invoice.

Once all details are reviewed, select ‘Done’ to pass the Requisition forward to the next stage of the procurement process.

Apply To All Editing

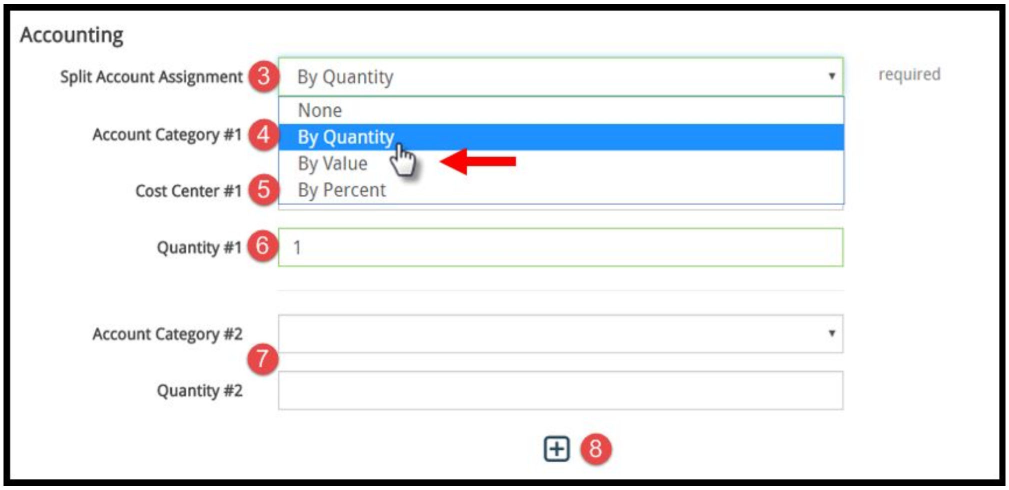
1. Select the line items you would like to update with the same accounting information by checking the boxes to the left of each.
2. Click 'Apply to All'.

3. Make appropriate changes and select ‘Apply Changes'. You will be returned to the Line Item Overview and your Line Items will be updated.

Split Account Assignment

While in the Edit a Request screen, you have the choice to amend the Line Item Details of the items or services you have selected.

1. From the Purchase Request screen, locate the item you would like to split and click on the linked item Description.
2. Scroll down to the Accounting section.
3. Choose how to split the Account Assignment—by Quantity, by Value or by Percent.
4. Choose an Account Category (i.e. Cost Center) from the drop down menu. The Cost Object options will automatically update based on your selection.



5. Choose the corresponding Cost Object.
6. Enter your Quantity, Value or Percent for the first part of your Accounting Split.
7. Input the split information for the second Account Category.
8. If more than two splits are needed, click the + button and continue filling out the relevant information for each until completed.
9. Scroll down and click the Save button to update the Line Item. (not pictured)
