

## Sm@rtBuy Training Manual

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## INTRODUCTION

Sm@rtBuy is York's on-line procurement system that streamlines purchasing at York, allowing for significant time savings for everyone currently involved in purchasing routine items. This training manual provides instruction on how to use Sm@rtBuy.

### ***Accessing Sm@rtBuy***

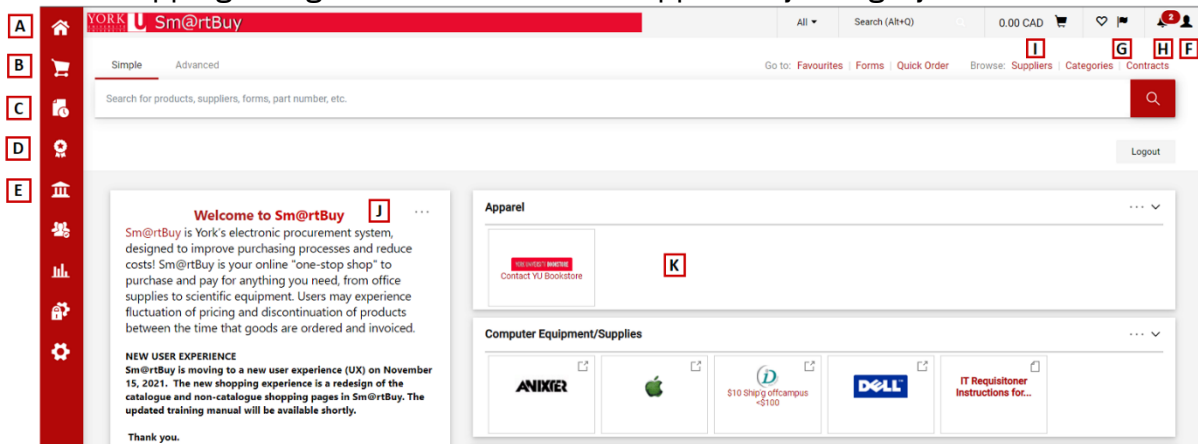
To access Sm@rtBuy users are required to authenticate through Passport York.

URL: <https://loginxml.apps06.yorku.ca> or click on the Sm@rtBuy link provided on York's Faculty & Staff homepage at <http://www.yorku.ca/yorkweb/fs.htm>

Upon successful authentication the Sm@rtBuy homepage ***[Diagram 1]*** will appear. The homepage is user friendly and easy to navigate.

# USER PROFILE

- A** Home – Link to the Homepage
- B** Shop – Shopping, My Carts and Orders
- C** Orders – Document search and approvals
- D** Contracts
- E** Accounts Payable
- F** User Icon – Access to own Profile,
- G** Action Items – My Assigned Approvals, Carts Assigned to Me, Invoice to Approve
- H** Notifications
- I** My Cart – Access to active cart
- J** Welcome – Notifications/messages from Procurement Services.
- K** Shopping Categories list of available suppliers by category

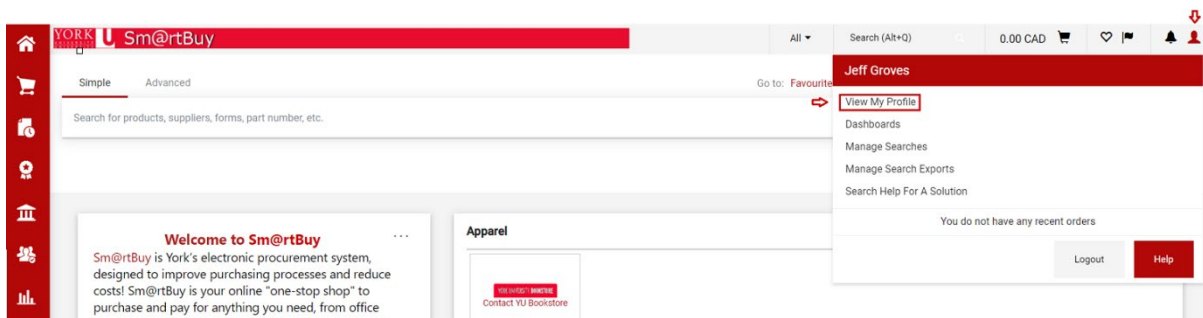


[Diagram 1]

## Updating Profile

Each user has a unique profile. If any information is incorrect or changes are required they can only be made through the HR Self-Serve system.

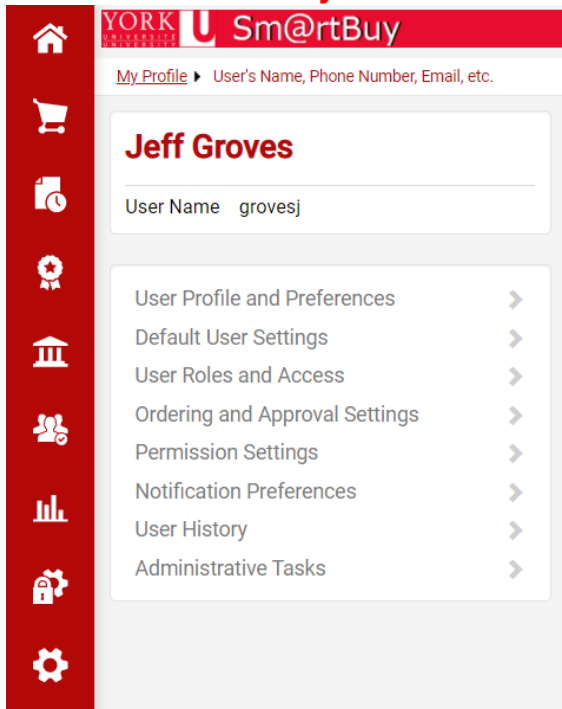
To access your Profile, from the Sm@rtBuy homepage, select the dropdown menu beside your user name and select **View My Profile**. [Diagram 2]



[Diagram 2]

On the My Profile page the following options are displayed [Diagram 3]:

- **User Profile and Preferences**
- **Default User Settings**
- **User Roles and Access**
- **Ordering and Approval Settings**
- **Permission Settings**
- **Notification Preferences**
- **User History**

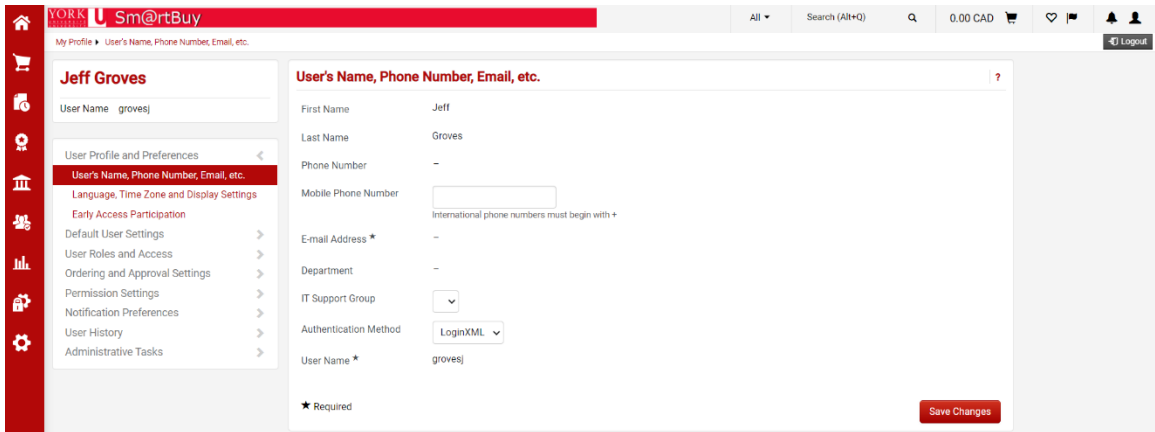


**[Diagram 3]**

## ***User Profile and Preferences***

### **User's Name, Phone Number, Email, etc.**

The User's Name, Phone Number, Email, etc, link is read-only except for the Email Approval Code, which is only visible to Approvers. A minimum of a four digit number is required in this field in order for Approvers to action on a requisition remotely. Enter digits in the Email Approval Code box and click **Save.** **[Diagram 4]**

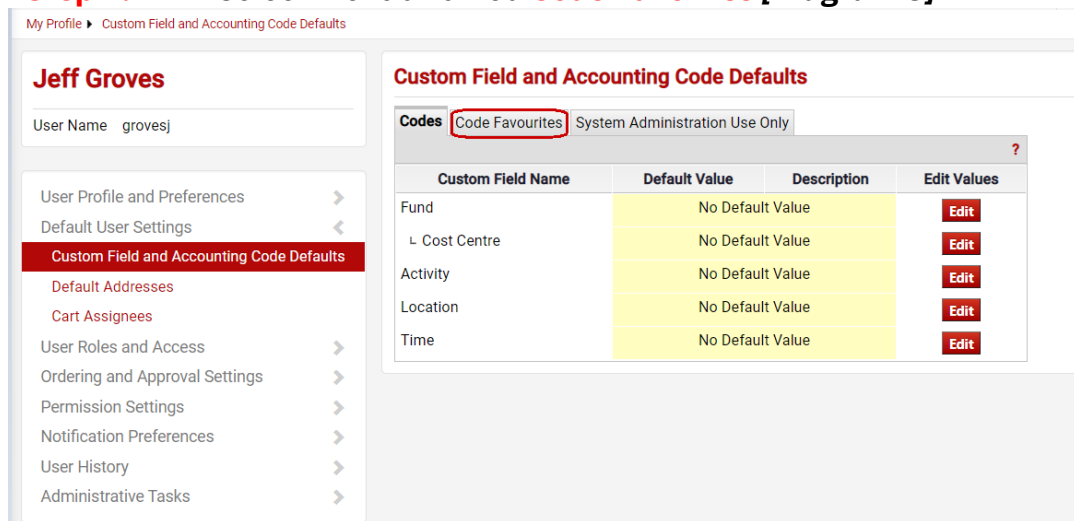


[Diagram 4]

## Custom Field and Accounting Code Defaults

To set up default Accounting Codes, on the My Profile homepage select **Custom Field and Accounting Codes Defaults** under **Default User Settings** selection menu.

### Step 1. Select the tab named **Code Favorites** [Diagram 5]



[Diagram 5]

### Step 2. Click the **Add** button to set up a combination of values to be used for checkout. [Diagram 6]

**Jeff Groves**  
User Name grovesj

User Profile and Preferences >  
Default User Settings <  
**Custom Field and Accounting Code Defaults**  
Default Addresses  
Cart Assignees  
User Roles and Access >  
Ordering and Approval Settings >  
Permission Settings >  
Notification Preferences >  
User History >  
Administrative Tasks >

**Custom Field and Accounting Code Defaults**

Codes Code Favourites System Administration Use Only

Use Code Favourites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favourite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favourites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

**Fund / Cost Centre**

Fund	Cost Centre	Activity	Time	Location
no value	no value	no value	no value	no value

Code Favorites for Check Requests & Invoices

Add

**Fund / Cost Centre**

Fund	Cost Centre	Activity	Time	Location
no value	no value	no value	no value	no value

[Diagram 6]

**Step 3.** A pop-up window then displays. [Diagram 7]

**Custom Field and Accounting Code Defaults**

Codes Code Favourites System Administration Use Only

Use Code Favourites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favourite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favourites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

**Fund / Cost Centre**

Nickname   Default

Fund	Cost Centre	Activity	Time	Location	add split
Select from all values...	Select from all values...	Select from all values...	Select from all values...	Select from all values...	

Save Cancel

Add

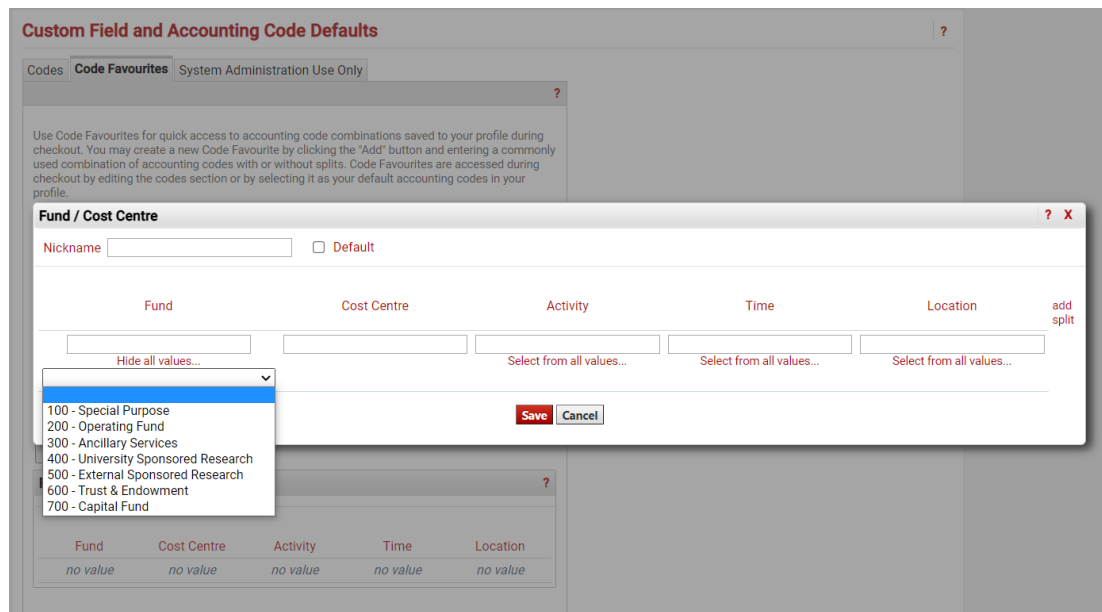
**Fund / Cost Centre**

Fund	Cost Centre	Activity	Time	Location
no value	no value	no value	no value	no value

[Diagram 7]



- Step 4.** Enter the nickname for the account code favourite. This should be a recognizable name that describes the use of the cost centre information you are about to create. (For example: Shopper1 Codes, Office Supplies, PER Grant). If creating more than one code favourite you need to add a different nickname for each one.
- Step 5.** Indicate by the **Default** checkbox if this is your “standard” accounting code string that you would like defaulted in your Profile. **Note:** If you have more than one code favourite, only one can be defaulted.
- Step 6.** To select the **Fund** click on the **Select from all values...** link and from the dropdown box choose from the available funds. Repeat this step for each accounting code. **[Diagram 8]**



**[Diagram 8]**

- Step 7.** Click the **Save** button.
- To delete an accounting code set, click the **Delete** button. To edit an accounting code set, click the **Edit** button and make any necessary changes. **[Diagram 9]**

## Custom Field and Accounting Code Defaults

Codes **Code Favourites** System Administration Use Only

Use Code Favourites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favourite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favourites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

**Add**

**Fund / Cost Centre**

Office Supplies **Edit** **Delete**

Fund	Cost Centre	Activity	Time	Location
200 Operating Fund	233000 FIN-Procurement Services	no value	no value	no value

[Diagram 9]

## Default Addresses – Ship To and Bill To

The shipping address identifies where the supplier should ship the item(s).

**Step 1.** On the My Profile homepage select **Default Addresses** under **User Information and Settings** menu. [Diagram 10]

My Profile > Default Addresses

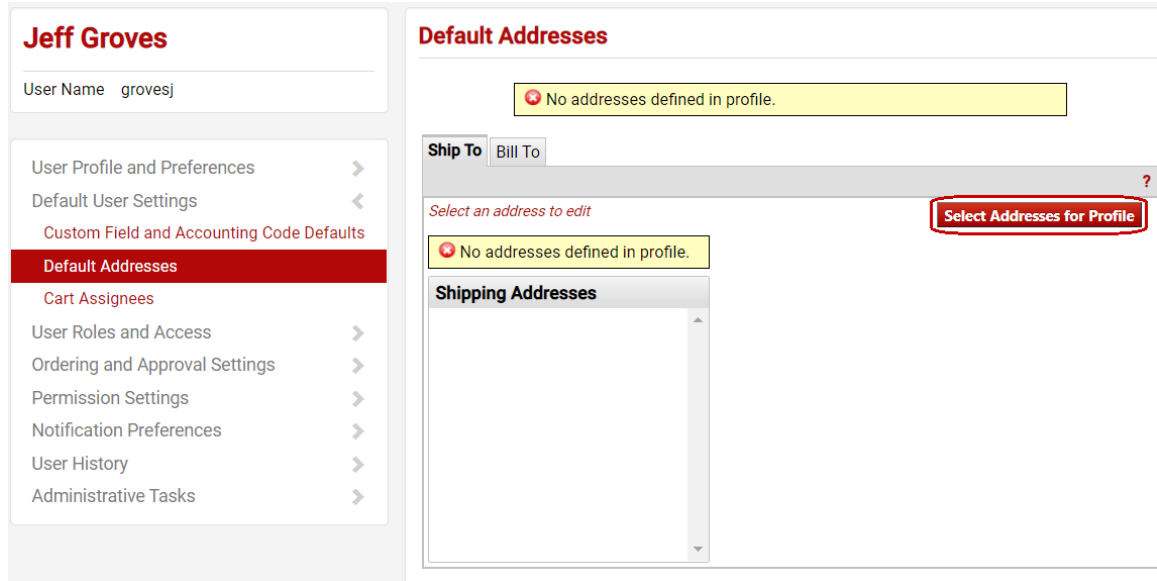
**Jeff Groves**

User Name grovesj

- User Profile and Preferences >
- Default User Settings <
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees

[Diagram 10]

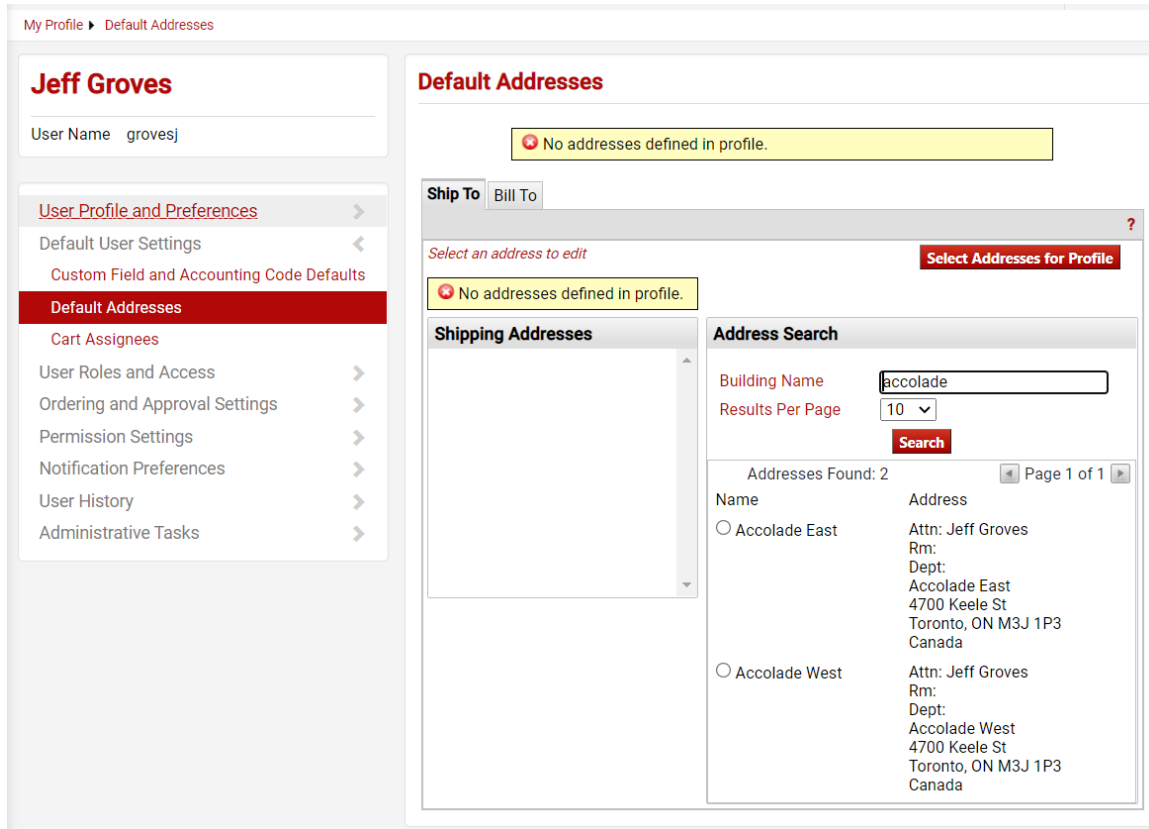
**Step 2.** To add an address (typically the user's default address) press the **Select Addresses for Profile** button. [Diagram 11]



[Diagram 11]

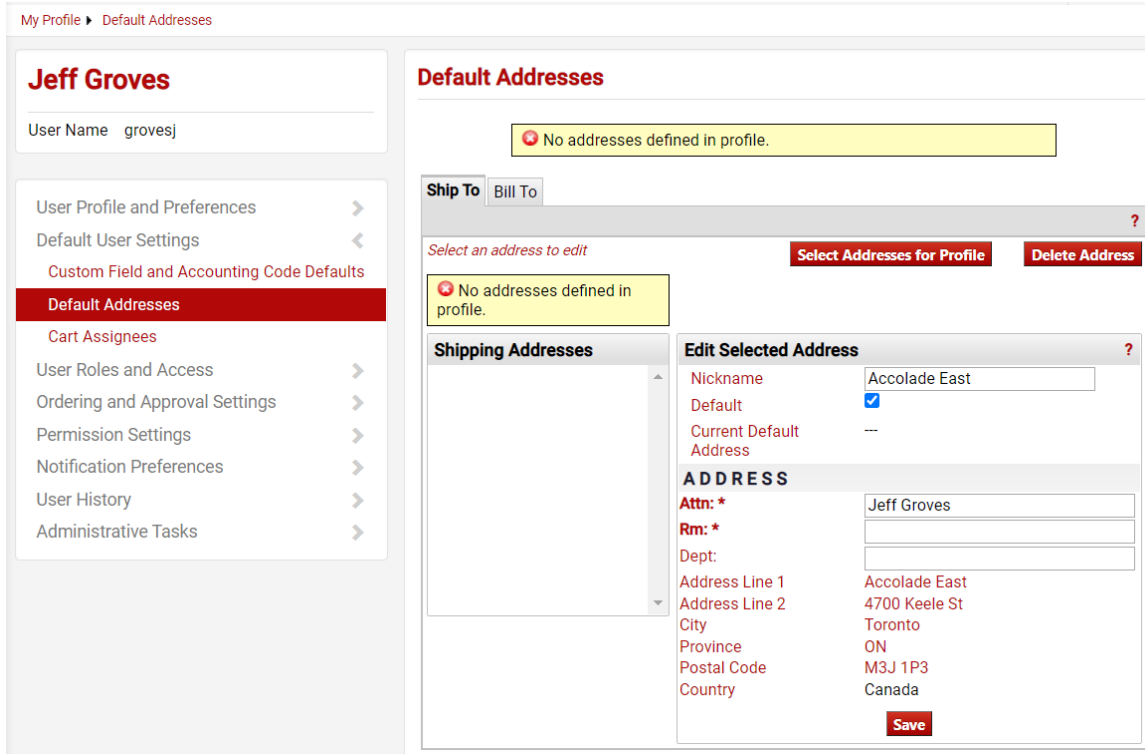
**Step 3.** To select an address using the search interface, use the following steps:

- a. Type the building name in the **Building Name** field. Please do not search using acronyms (e.g. ACE).
- b. Determine the desired number of results for display by selecting a number from the **Results per Page** drop-down box.
- c. Click the **Search** button. See [Diagram 12]



[Diagram 12]

- Step 4.** Select the radio button adjacent to the address desired for the current user ID.
- Step 5.** Edit the **Nickname** and select the **Default** checkbox if this address is the desired default **Ship To** address.
- Step 6.** Review the information and make any necessary changes. This includes entering freeform text such as **Attn.**, **Room Number** and **Department**.
- Step 7.** Press the **Save** button to save changes. The selected address displays in the **Shipping Addresses** list box. [Diagram 13]
- Step 8.** Press the **Delete** button to remove an address if the address was selected in error or if it is no longer needed. [Diagram 13]
- Step 9.** Repeat the steps above to add any additional shipping addresses to the profile.



[Diagram 13]

**Address Bill To** - The billing address identifies where the supplier **should send the invoice**. This address has been defaulted to Accounts Payable and cannot be changed.

## Language, Time Zone and Display Settings

You can set the following preferences from the Language, Time Zone and Display Setting link: **Diagram 14]**

- Language:** This field determines the language displayed on the screen. English and French are the two available options.
- Country:** Only Canada can be selected.
- Currency:** Select CAD.
- Time Zone:** Set to EDT/EST – Eastern Standard Time.
- Color Theme:** Set to **York**
- Enable Accessibility Mode:** This field should be enabled for those users who would like to use the application via a screen reading. Enabling this field will turn on field labels, noted as question marks. It will also enable a skip navigation link. This allows screen readers the ease of navigating to the content pane versus individual tabs.

**Help on mouse over:** This field determines whether or not field-specific help displays when “hovering” on a field in Sm@rtBuy. By default this setting is on.

**Preferred e-mail format:** Leave this blank; this is to be set by system administrators only.

The screenshot shows a user profile page for 'Jeff Groves'. The main content area is titled 'Language, Time Zone and Display Settings'. It contains several settings: 'Select a Language' (dropdown), 'Country' (dropdown), 'Currency' (dropdown), 'Time Zone' (dropdown), 'Color Theme' (dropdown), 'Preferred email format' (dropdown), and 'Access Training Content Configuration' (radio buttons for Yes/No, with 'No' selected). Below this is an 'Accessibility' section with 'Enable Accessibility Mode' (radio buttons for Yes/No, with 'No' selected), 'Help on mouse over' (radio buttons for On/Off, with 'On' selected), and 'Enable Limited Animation' (radio buttons for Yes/No, with 'No' selected). A 'Save Changes' button is located at the bottom right of the settings area.

[Diagram 14]

## Notification Preferences

The Notification Preferences screen [Diagram 15] is used to notify users when specific events happen in the system or an issue is pending that requires the user's attention. Notifications for specific users are managed through the Notification Preferences menu in the user profile. This includes configuring which notifications the user will receive and the method of delivery (in application, email, or both). Often, this information is inherited from a role but it can be overridden at the user level. If a notification preference is not inherited, it will default to None.

- Step 1.** From the **User Information Settings** menu; select the **Notification Preferences** sub-link. **Note:** The notification options listed are dependent on a user's permissions.
- Step 2.** Select a sub-menu to choose a specific notification preference. For example, the **Administration & Integration**, then locate and click the **Edit Section** on the screen
- Step 3.** Radio button options will display to the right of the notification. To override the default status for the notification, click the Override radio button. If a status has been overridden and you would like to restore the default, click the Default radio button.
  - Email - indicates that the user receives the notification by email.

- Notification - indicates that the user receives the notification in the application. **Important Note:** In-application notifications are not available for all notifications. For those items, the Notification status option will not be available.
- Email & Notification - indicates that the user receives the notification in both ways.
- None - indicates that the user does not receive this notification.

**Step 4.** When you have completed the changes, click Save.

**Jeff Groves**  
User Name grovesj

**Notification Preferences: Administration & Integration** Edit Section ?

Prepared By - PO Distribution Failure Notice	None
User Registration pending approval	None
Search Result Export Confirmation	Email & Notification
PR Workflow Step error notice	Email & Notification
PR Export Failure Notification	Email & Notification
PO Workflow Step error notice	Email & Notification
PO Distribution Failure Notice	Email & Notification

**Notification Preferences: Administration & Integration** ?

Prepared By - PO Distribution Failure Notice	<input type="radio"/> Default <input checked="" type="radio"/> <b>Override</b>	<b>None</b>
User Registration pending approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	
Search Result Export Confirmation	<input checked="" type="radio"/> Default <input type="radio"/> Override	
PR Workflow Step error notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PR Export Failure Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PO Workflow Step error notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PO Distribution Failure Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
PO Export failure notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Invoice Export failure notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification
Contract Item XML Import Failure Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Contract Item XML Import Warning Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Supplier XML Import Failure Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Supplier XML Import Warning Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Supplier Export Failure Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Real Time Supplier Export Failure Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Receipt Export failure notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
User Export Failure Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None

None  
None  
Email  
Notification  
Email & Notification

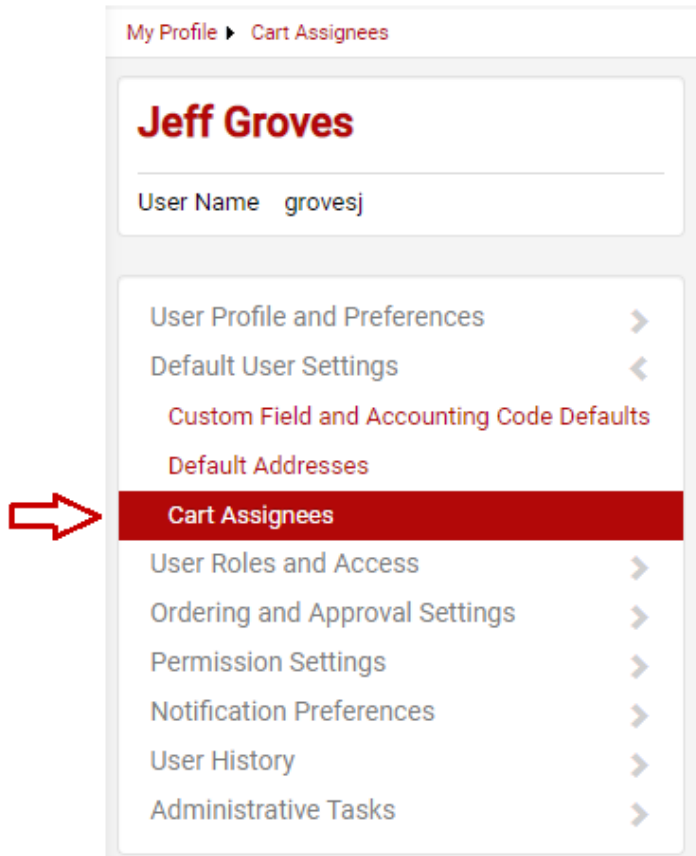
**Save Changes** Cancel

[Diagram 15]

## Cart Assignee

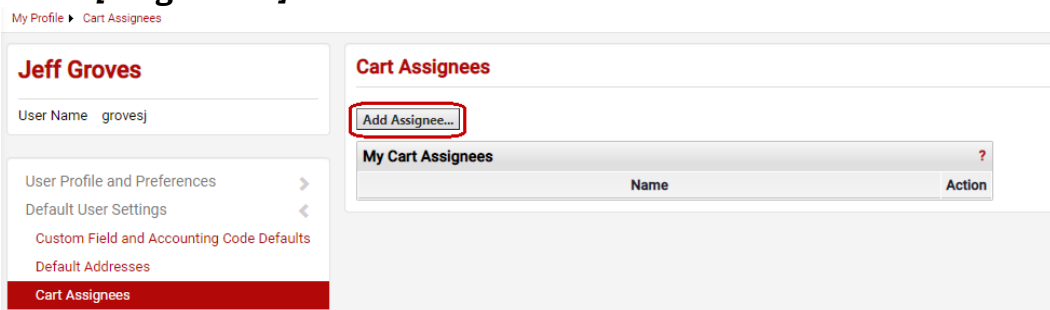
Users who only have the Shopper role can set up a default cart assignee. The preferred assignee is another individual who can submit and process the cart, also known as the Requisitioner.

- Step 1.** Navigate to **View My Profile**, click on the **Default User Settings** and select **Cart Assignees**. **[Diagram 16]** Any previously selected assignees are listed.



**[Diagram 16]**

- Step 2.** To add a user as a cart assignee, click the **Add Assignee** button. **[Diagram 17]**



**[Diagram 17]**



**Step 3.** From the **User Search** pop-up window, enter the last name to locate the cart assignee

**Step 4.** Click **Search**. **[Diagram 18]** **Note:** You do not need to fill out all fields in the **User Search** dialogue.

User Search

Last Name

First Name

User Name

Email

Department

Position

Role

Results Per Page

Search

**[Diagram 18]**

**Step 5.** The search results display only users that meet the requested criteria and are set up to submit carts. Locate the user from the list, and click the **Select** link from the **Action** column. **[Diagram 19]**

New Search

Name	User Name	Email	Phone	Action
Groves, Jeff	grovesj			[select]

**[Diagram 19]**

**Step 6.** From the assignee list, click the **Set as Preferred** button to make the user the default Requisitioner for your orders. **[Diagram 20]**

## Cart Assignees



**[Diagram 20]**

Repeat steps above to add additional cart assignees to your list.

To remove a Requisitioner as the preferred (i.e. default) Requisitioner, simply click the **Remove** button to the right of the Requisitioner's name. **[Diagram 21]**

## Cart Assignees

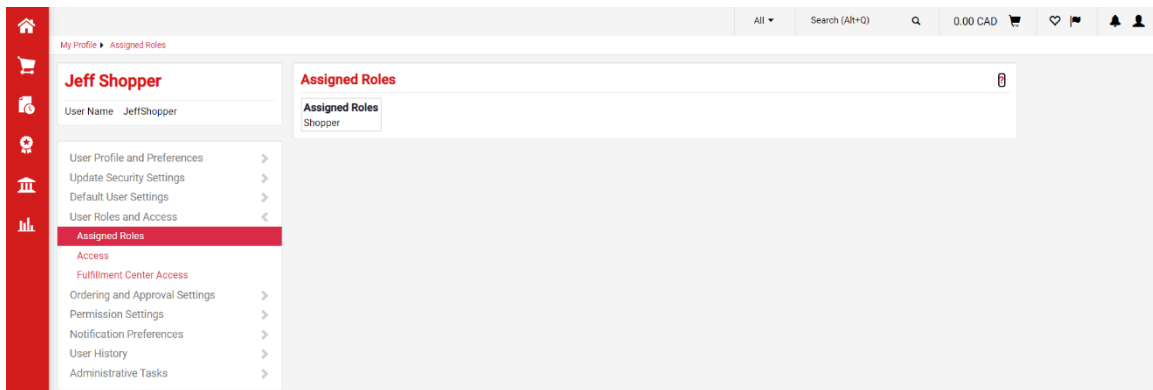


**[Diagram 21]**

## User Access and Security

### Assigned Roles

Provides a read-only list of the role(s) assigned to the user. Roles can only be changed by the eProcurement Administrators. **[Diagram 22]**



**[Diagram 22]**

## Access

The Document Search Access screen grants search access to documents. By default all users will have access to document search.

## Permission Settings

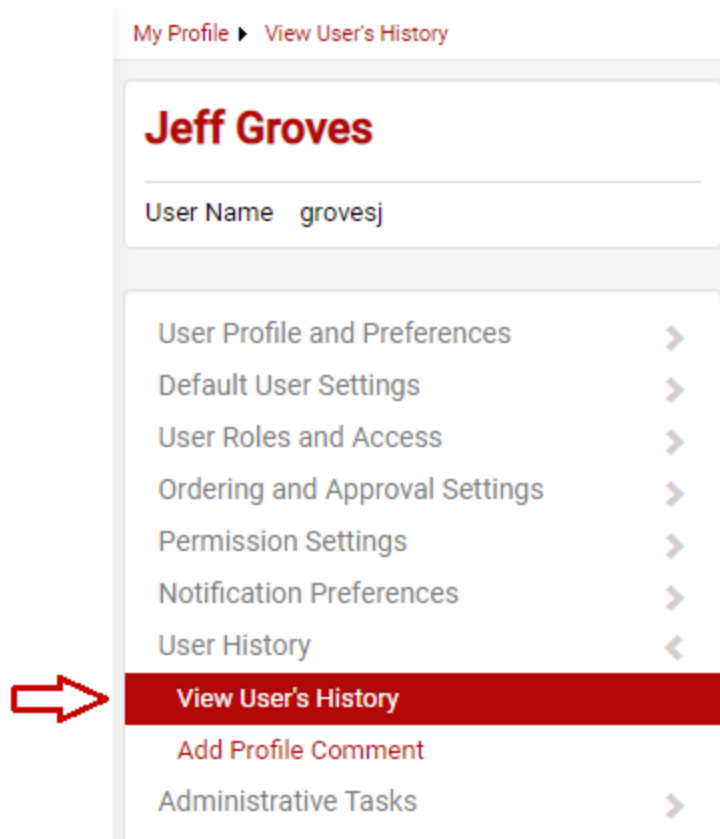
Permissions are set by the eProcurement Administrators.

## User History

The **View User's History** link provides an audit trail that tracks changes made to a user's profile. This is an information-only screen that provides detailed information about potentially important changes such as changes to roles and permissions, Approvers, addresses and more. The History screens are used to track changes, additions and deletions.

To view all changes, additions and deletions related to a user's profile.

- Step 1.** Navigate to the **View My Profile** screen, click **User History** and select **View User's History**. *[Diagram 23]*



*[Diagram 23]*

Review the user profile history. The columns in the history table are described below **[Diagram 24]**:

- Date:** The date and time a change was saved.
- User:** The user who made the change.
- Action:** The type of action the user took. Typically, either creating or modifying information for the user.
- Section:** The section of the user profile in which the changes took place.
- Selection:** The area or value added. This field is not always applicable to a change.
- Field:** The specific field the user modified. This field is not always applicable to a change.
- Old Value:** The value prior to the change. This field is not always applicable to a change.
- New Value:** The value saved by the change. This field is not always applicable to a change.

## View User's History



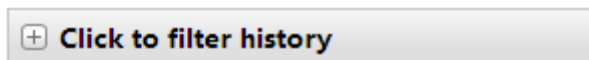
?

Results Per Page  Records Found: 31 Page 1 of 2 ?

Date	User	Action	Section	Selection	Field	Old Value	New Value
16/11/2021 2:36:35 PM	Jeff Groves	Modified	Cart Assignees		Preferred Assignee	empty	Jeff Groves
16/11/2021 2:35:20 PM	Jeff Groves	Assignee Added	Cart Assignees	Jeff Groves			
16/11/2021 2:26:57 PM	Jeff Groves	Assignee Removed	Cart Assignees	Jeff Groves			
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	Fund	200	empty
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	AVP or Dean	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	Research Cost Centre	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	VP Designate	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	Time	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	Activity	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	Director or EO	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	Location	empty	empty
16/11/2021 12:51:47 PM	Jeff Groves	Code Favourite Removed	Code Favourites	Nickname : Office Supplies	Cost Centre	233000	empty
16/11/2021 11:57:05 AM	Jeff Groves	Assign Cart Substitute Removed				Elli Abaei	empty

**[Diagram 24]**


The History tab provides the ability to filter the audit trail based on certain criteria. To filter the data displayed in the table: Click the **+** sign at the top of the screen




Enter the appropriate filter criteria to determine what historical data displays, then click **Apply**. The historical data updates immediately. **[Diagram 25]**

## View User's History

**Filters** ?

Start Date    
dd/mm/yyyy

End Date    
dd/mm/yyyy

Action  ▼

Section  ▼

**Apply**

[Diagram 25]

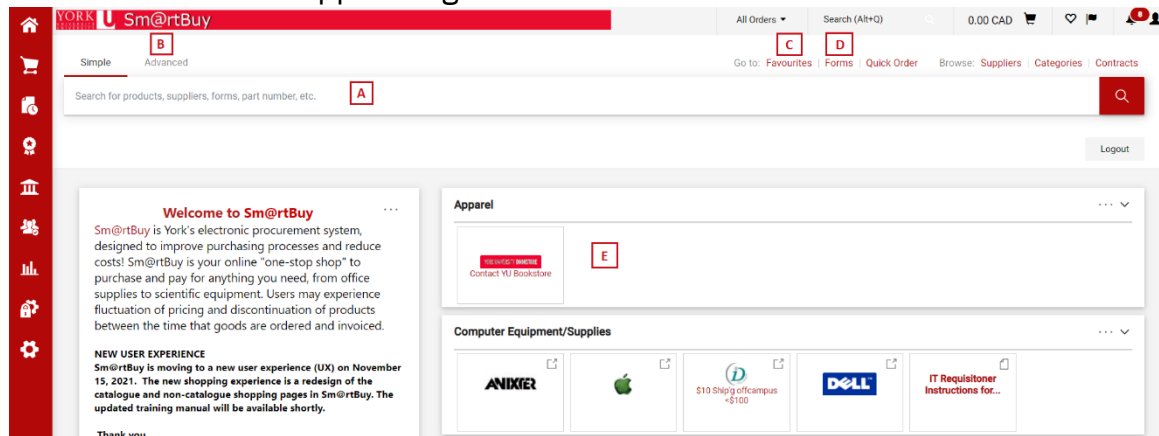


## SHOPPER

The Shopper role allows users to find items and create shopping cart(s), access catalogues and use forms to procure non-catalogue and specialty items. The cart is then assigned to a Requisitioner for processing and submission.

Items can be added to the cart through many of the screens in Sm@rtBuy. Listed below are the different places where products can be found from the homepage as shown **[Diagram 26]**:

- A** Simple Search
- B** Advanced Search
- C** Favourites
- D** Forms
- E** Click on the Supplier Logo



**[Diagram 26]**

### Simple Search

From the homepage enter the product you are searching for into the search field. Then click the **Magnifying Glass** button. This will generate a list of items matching your keywords. **[Diagram 27]**



**[Diagram 27]**

### Advanced Search

From the homepage click the **Advanced Search** link. The following search fields are available: **[Diagram 28]**


- Keywords
- Supplier
- Part number (SKU)
- Manufacturer Name

- Commodity Code
- Other Options – (e.g. exact phrases or word search)

Enter the criteria and click the **Search** button.

[Diagram 28]

## Add Items to Favorites and How to Access Favourites

**Step 1.** Search for an item and then click on the **Heart Icon**  to add favorite [Diagram 29]

[Diagram 29]

**Step 2.** Create a **Destination Folder** by clicking on the **Create New** and select **Top Level Personal Folder**, then name the folder and save. If you have previously created a destination folder and wish to add this item to it, then simply select the existing Destination Folder.

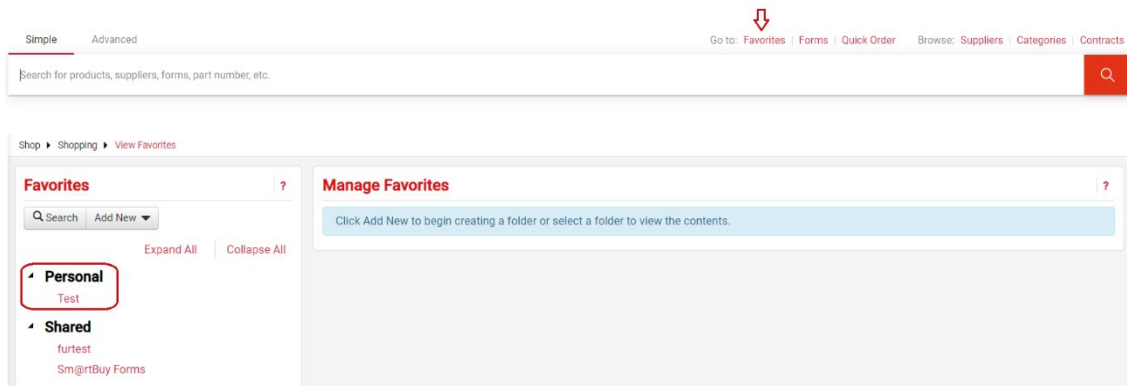
[Diagram 30]



[Diagram 30]

**Step 3.** Click **Save Changes**.

**Step 4.** Go to the **Favourites** [Diagram 31] (which you can access from the link below the **Shop Everything** product search bar or simply select the Shopping Cart icon and then click on **View Favourites**).



[Diagram 31]

**Step 5.** Locate and select the appropriate personal folder where the item resides.

**Step 6.** From the right side of the pane, locate the item, update the defaulted quantity if needed, and click **Add to Cart**.

### **Add Items to a Cart**

**Step 1.** On the **Home/Shop** screen a list of available suppliers is displayed.

**Step 2.** Select the logo or name of the supplier.

**Step 3.** A search box will be available for certain supplier catalogues. Type in the product name or number and click **Search**.

**Step 4.** For certain supplier catalogues, Sm@rtbuy redirects to the suppliers' web site. Search for products and add products to the cart in the suppliers' website. This checkout process varies from supplier to supplier. Use the suppliers' mechanism to complete the order process and return to Sm@rtbuy.

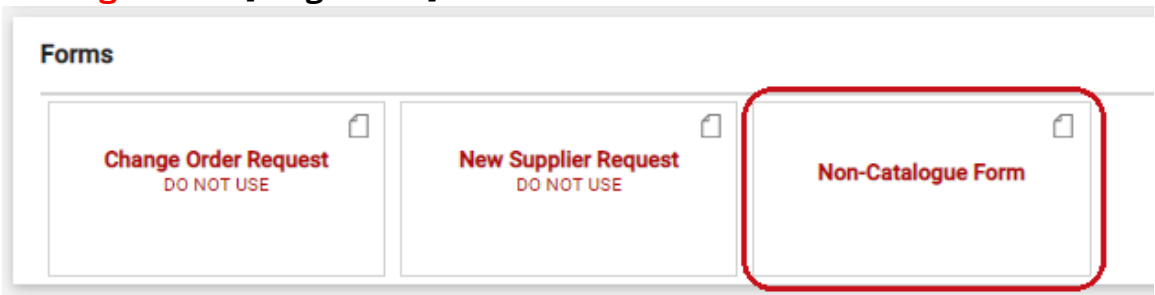
**Step 5.** Upon returning to Sm@rtbuy the user will be on the **Shopping Cart** page. The user can either click on **Assign Cart** or **Proceed to Checkout** to complete the address and account code details.

For certain suppliers a form will open. Populate the form. Select **Add and go to Cart** from the available drop-down menu at the top right corner of the form, then click **Go**.

### **Using the Non-Catalogue Form**

This form is used to purchase more than one item at a time. See Instructions to the left on the Form. To add additional lines to your Requisition, select **Add to Cart and Return** option from the Available Actions drop down menu at the top right corner of the form.

**Step 1.** From the **Home Page**, under the **Forms** category, choose **Non-Catalogue Form [Diagram 32]**



*[Diagram 32]*

**Step 2.** Populate the form.

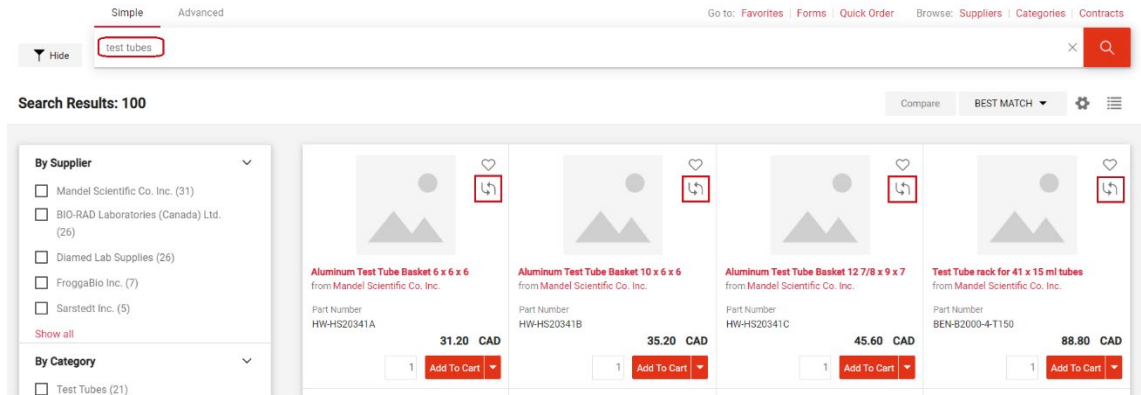
**Step 3.** Select **Add and go to Cart** from the Available Actions drop down menu at the top right corner of the form.

**Step 4.** Click **Go**.

## Searching Items from Product Comparison

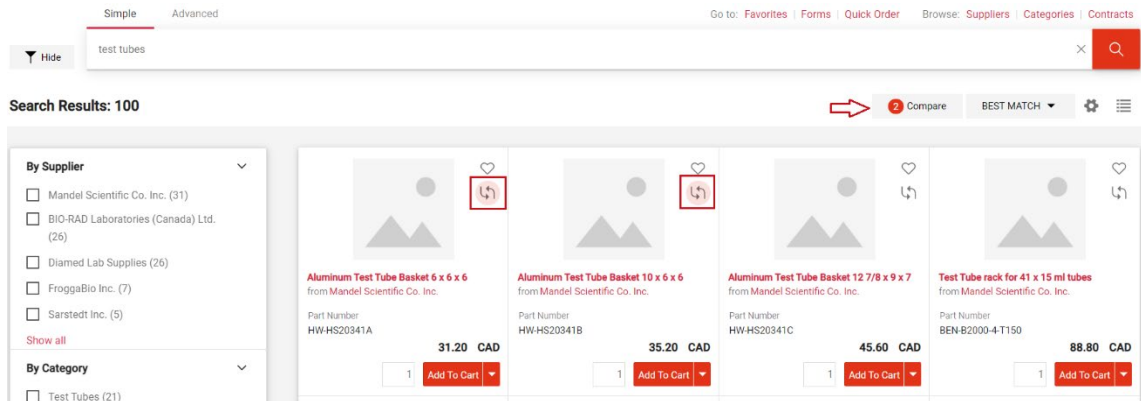
The product comparison functionality is available for most Catalogues.

**Step 1.** From the Search results click on the **Inverted Arrows**  Icon under the **Add Favorite** Icon. **[Diagram 33]**



**[Diagram 33]**

**Step 2.** Once you have selected at least 2 items for comparison, the **Compare** button will become active. Clicking the **Compare** will give you a side by side comparison of the product details for each item. **[Diagram 34 & 35]**



**[Diagram 34]**

Compare 2 Items			
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add to Cart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product Image			
Product Details	Aluminum Test Tube Basket 6 x 6 x 6	Aluminum Test Tube Basket 10 x 6 x 6	
Catalogue No.	HW-HS20341A	HW-HS20341B	
Price	31.20 CAD	35.20 CAD	
Supplier	Mandel Scientific Co. Inc.	Mandel Scientific Co. Inc.	
Category	Miscellaneous hardware	Miscellaneous hardware	
UOM	---	---	
Price per UOM	31.20 CAD / unit	35.20 CAD / unit	
Product Size	---	---	
Price per Product Size Unit	---	---	
Category UNSPSC	31-16-28-00	31-16-28-00	
Color			
Manufacturer Name	HEATHROW	HEATHROW	
Packaging UOM	EA	EA	
Product Size			
UNSPSC	31-16-28-00	31-16-28-00	

[Diagram 35]

- Step 3.** To add items from comparison page simply:
- Click the **Add to Cart** button for a single item.
- OR
- Place a check in the desired items' **Select** checkboxes and choose **Add to Active Cart** in the dropdown menu then click **Go** [Diagram 36]

Compare 2 Items			
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add to Cart	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product Image			
Product Details	Aluminum Test Tube Basket 6 x 6 x 6	Aluminum Test Tube Basket 10 x 6 x 6	

[Diagram 36]

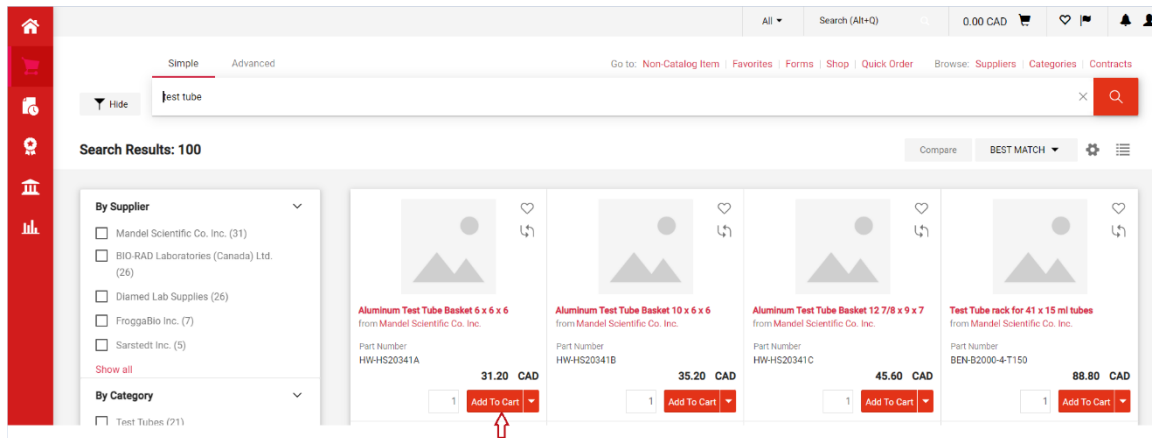
## To Add Items to a Cart

**Step 1.** Search for products using any of the search tools mentioned in this handbook. Search results display at the bottom of the screen.

**Step 2.** Click on the **Product Name** to open its **Product Details**.

**Step 3.** Set the desired quantity and choose **Add to Active Cart** in the dropdown menu, then click **Go**. **[Diagram 37]**

**Step 4.** You can access the cart by clicking on the **Shopping Cart** icon at the top right corner of the screen, then select **View My Cart**.

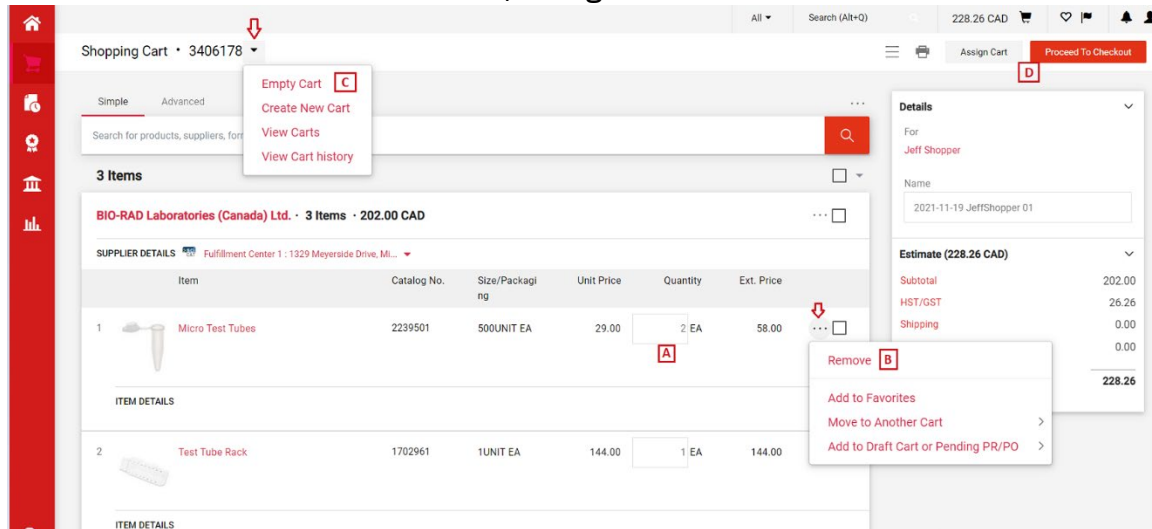


**[Diagram 37]**

## Adding and Removing Items from a Cart

The following actions can be taken on an active cart: **[Diagram 38]**

- A** Update the item quantity
- B** Remove an item from a cart
- C** Remove all items from a cart
- D** Proceed to Checkout / Assign Cart



**[Diagram 38]**

## **A Update the Quantity for Specific Supplier Catalogue Items**

- Step 1.** Go to a shopping **cart** with a **catalogue item**.
- Step 2.** In the **Quantity** field for the product modify the desired quantity.

The **Total** items will be auto revised in the left corner below the search bar of the application.

### **Update Information from a Form or Non-Catalogue Item (accessed via the cart)**

- Step 1.** Access your cart by clicking on the **Shopping Cart** icon at the top right corner of the screen.
- Step 2.** Select **My Carts and Orders** then click on the **View Carts**.
- Step 3.** Select the Non-Catalogue item.
- Step 4.** Click on the **Product Name** to open the form.
- Step 5.** Update the appropriate fields (catalogue #, price, etc.).
- Step 6.** Select **Save** from the dropdown list at the top right of the screen.
- Step 7.** Click the **Go** button followed by the **Close** button.

The form refreshes on the screen and the **Cart** reflects the updated values. You may now **Assign the Cart** or **Proceed to Checkout**.

### **Update Specific Vendor Catalogue Items**

- a. Access your cart by clicking on the **Shopping Cart** icon at the top right corner of the screen, then select **View My Cart**.
- c. To select additional items, click on the supplier logo and depending on the supplier you will either remain on the Sm@rtbuy page or be taken to the supplier website and add new products. Follow the submit order process either within the Sm@rtbuy page or from the supplier website.

## **B Remove Selected Items from a Cart**

- Step 1.** Access your cart by clicking the **Shopping Cart** icon at the top right corner of the screen.
- Step 2.** Select **View My Cart**.
- Step 3.** In a multi-line cart select one or more items to be removed by placing a check in the **Select** checkbox.
- Step 4.** Next, choose **Remove Selected Items** in the available actions dropdown list (above the items in the cart).

The system removes the selected items and updates the **Cart** values in the upper Left corner of the screen. Alternatively, you can click on the **Remove** button on the left side of each line item in the cart.

### C Remove All Items from a Cart

**Step 1.** Access your cart by clicking on the **Shopping Cart** icon at the top right corner of the screen, then select **View My Cart**.

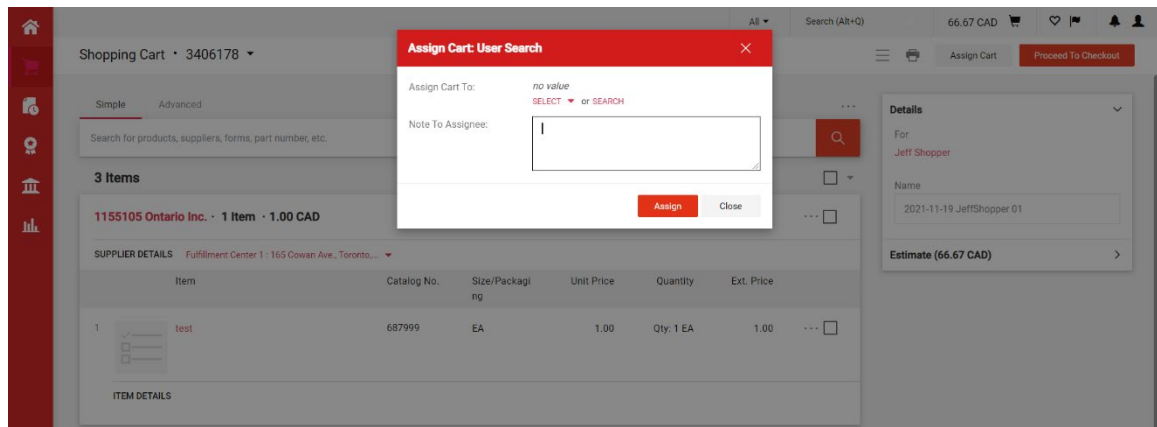
**Step 2.** Click on the **Empty Cart** button from the dropdown menu on the top left of the screen which is next to cart number.

### Assigning a Cart to a Requisitioner

**Step 1.** Access your cart by clicking on the **Shopping Cart** icon at the top right corner of the screen, then select **View My Cart**.

**Step 2.** At this stage, you can choose to **Assign the Cart** (Shoppers) or click the **Proceed to Checkout** button and enter the shipping and account code information.

**Step 3.** Click the **Assign Cart** button at the upper right corner of the screen. The Assign Cart popup displays. **[Diagram 39]**

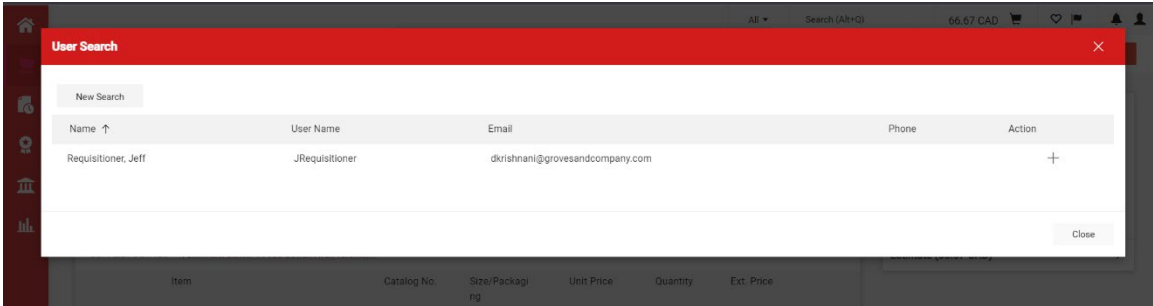


**[Diagram 39]**

### Determine the Assignee

If a preferred assignee is defined in the user's profile, this user displays by default.

**Step 1.** If a default assignee has not been assigned, click on the **Search** link to assign the cart to assignee. The **User Search** box will appear. Search by name for eligible assignees. **Note: You do not need to fill out all fields in the user search. First or last name will suffice. [Diagram 40]**



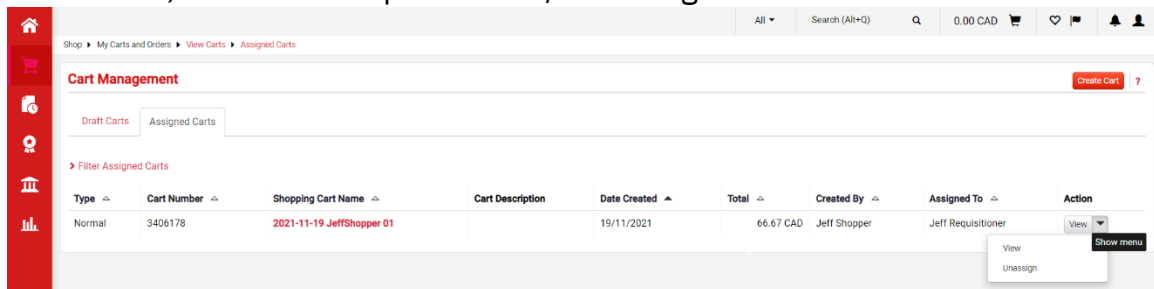
[Diagram 40]

- Step 2.** Locate the user from the list, and click the **Select** link from the **Action** column.
- Step 3.** OPTIONAL: Enter a note to the assignee, explaining the reason for this order, or any other relevant information to assist the Requisitioner processing your cart.
- Step 4.** Click **Assign**. You will see a confirmation screen for your assigned cart.

### Viewing/ Un-assigning Previously Assigned Carts

- Step 1.** To view the previously assigned cart prior to it being submitted by the assignee, you can access it via the **Shopping Cart** icon.
- Step 2.** Select **My Carts and Orders** as shown below.
- Step 3.** Click the **View Carts** link to view details of the cart that was assigned or click the **Unassign** button to withdraw the cart assignment [Diagram 41(a)].

From there, carts can be updated and/or reassigned.



[Diagram 41(a)]

### Deleting Shopping Carts

- Step 1.** Select the **Shop** navigation tab and then select **My Carts and Orders** on the menu,
- Step 2.** Click **View Carts**, select **Draft Carts** tab.
- Step 3.** Use the **Delete** button on the right of the page to delete selected carts. After selecting **Delete**, the system deletes the cart



immediately. For **Drafts Assigned to Me**, a message box appears to specify a reason for deleting the cart. Once a cart is deleted, it is permanently removed and it cannot be restored. **[Diagram 41(b)]**

The screenshot displays the 'Cart Management' section of a web application. It features a navigation bar at the top with 'Shop', 'My Carts and Orders', 'View Carts', and 'Draft Carts'. A search bar and a '0.00 CAD' indicator are also present. Below the navigation, there are tabs for 'Draft Carts' and 'Assigned Carts'. A 'Filter Draft Carts' section is visible above a table. The table has columns for 'Type', 'Cart Number', 'Shopping Cart Name', 'Cart Description', 'Date Created', 'Total', and 'Action'. Two rows of draft carts are shown. The first row has a total of 66.67 CAD, and the second row has a total of 0.00 CAD and is marked as 'Active'. An 'Action' dropdown menu is open for the second row, showing options for 'View', 'Activate', and 'Delete'.

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	3406178	2021-11-19 JeffShopper 01		19/11/2021	66.67 CAD	View
Normal	3406206	2021-11-19 JeffShopper 02		19/11/2021	0.00 CAD	View Activate Delete

**[Diagram 41(b)]**



## REQUISITIONER

The Requisitioner has all access as outlined in the Shopper section in addition to the following:

- A. Receiving and Reviewing Assigned Carts
- B. Adding or Changing Ship-to Addresses and Accounting Codes
- C. Updating Cart Information
- D. Return/Delete a Cart
- E. Submitting Carts
- F. Copying Previous Requisitions to a New Cart
- G. View Document History and Comments
- H. Assigning/Un-assigning a Substitute Requisitioner
- I. Receiving

### A. Assigning and Reviewing Carts

As a Requisitioner, you will receive email notifications to let you know that a cart has been assigned to you for review and submission in Sm@rtBuy. The email contains a link that will take you to the cart. You can also log into Sm@rtBuy and review any new carts in the **Action Items** box on the upper right side of the page. **[Diagram 42]**

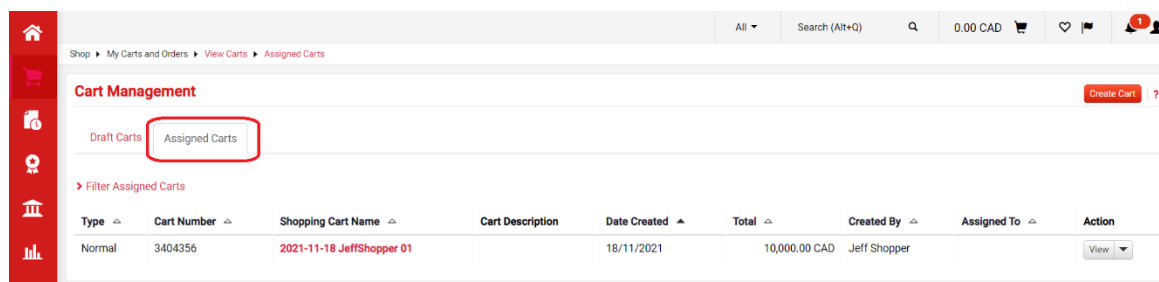


**[Diagram 42]**

**Step 1.** Click on the **Action Items** link on the **Home/Shop** page.

**Step 2.** Click the **Carts Assigned to Me** option.

**Step 3.** There will be list of carts available under **Assigned Carts** tab. **Click** on the Shopping Cart Name to open the cart. **[Diagram 43]**



**[Diagram 43]**

**Step 4.** To review the order, click **Proceed to Checkout**. You will need to verify that the details like **Shipping** and **Accounting Codes** are correct. If there is a required information missing, these will be highlighted under **Correct These Issues** section on the right side of

the screen. Requisitioner would need to populate these required details before the request can be submitted. **[Diagram 44]**

The screenshot displays a requisition form for '2021-11-18 JeffShopper 01'. It is divided into several sections: 'General', 'Shipping', 'Billing', and a 'Draft' summary box. The 'Shipping' and 'Billing' sections are highlighted with red boxes. The 'Shipping' section includes fields for 'Ship To' with details: 'Attn: Jeff Requisitioner', 'Rm: 102', 'Dept: Accolade East', '4700 Keele St', 'Toronto, ON M3J 1P3', and 'Canada'. The 'Billing' section includes 'Bill To' details: 'Accounts Payable', 'East Office Building', '4700 Keele Street', 'Toronto, ON M3J 1P3', and 'Canada'. The 'Draft' summary box on the right shows a total of 10,000.00 CAD and lists required fields: 'Required: Fund' and 'Required: Cost Centre'. A red error message at the top of the draft box states: 'Correct these issues. You are unable to proceed until addressed.'

**[Diagram 44]**

**Step 5.** If any information needs to be changed for shipping or accounting codes, detailed information can be found in **Section B - Changing Ship-To Addresses and Accounting Codes** (below).

### **B. Changing Ship-To Addresses and Accounting Codes**

**Step 1.** From the **Action Items** box on the **Home/Shop** page, click the **Carts Assigned to Me** option.

**Step 2.** Select a cart that was assigned to you.

**Step 3.** Click **Proceed to Checkout**.

**Step 4.** Click on the **Pencil** icon in the **Shipping** section to update it. You can choose from one of the **Default Addresses** in your profile (marked with a star) or click on the **Magnifying Glass** in the **Search Additional** field to search for a different address.

**Step 5.** **Save** when you have selected the appropriate address. **[Diagram 45]**

**Edit Shipping** [Close]

**CURRENT ADDRESS** [Refresh]

Attn: \* Jeff Requisitioner  Add to my addresses

Rm: \* 102

Dept:

Address Line 1 Accolade East

Address Line 2 4700 Keele St

City Toronto

Province ON

Postal Code M3J 1P3

Country Canada

My Address - Jeff Requisitioner, 102, [Dept.], Accolade East, 4700 Keele St, Toronto, ON M3J 1P3, Canada [Star]

Search additional [Magnifying Glass] Results Per Page 10 [Dropdown]

★ Required fields [Save] [Close]

**[Diagram 45]**

**Step 6.** Scroll down the **Accounting Codes** section. Review fund and cost centre information at the header level. If you need to add the missing fund or cost centre information, click on the text **Required**.

If you need to change these details, click on the **Pencil** icon on the right side of the page and choose the appropriate Account, fund and cost centre combination by clicking on the **Magnifying Glass** on these fields.

**Step 7.** **Save** when you have selected the appropriate fund and cost centre. **[Diagram46]**

**Edit Accounting Codes** [Close]

Account Number

Account \* 301000 [Magnifying Glass]

Fund / Cost Centre

Fund *	Cost Centre *	Activity	Time	Location
200 [Checkmark]	113020 [Magnifying Glass]	Search [Magnifying Glass]	Search [Magnifying Glass]	Search [Magnifying Glass]

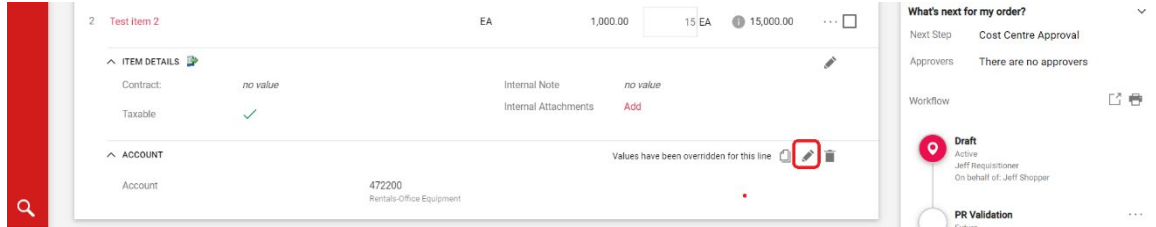
★ Required fields [Save] [Close]

**[Diagram 46]**

**Step 8.** Review the **Account** number for each item at the line level or if applicable, at the header level under the **Accounting Codes** section. If the account number is incorrect, correct it by clicking on the **Pencil** icon on the right side of the page and choose the

appropriate Account using the **Magnifying Glass** option to search for an account code.

**Step 9. Save** when you have selected the appropriate account code.  
**[Diagram 47]**



**[Diagram 47]**

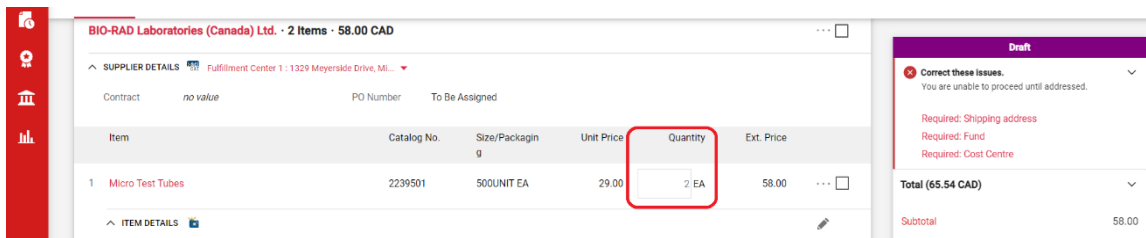
### C. Updating Cart Information

If you have a cart that has been submitted to you with an error in the Type or Quantity of an item ordered, you can alter the quantity or remove lines from the cart.

#### Updating Quantities

To update the quantity of an item ordered, open the cart, alter the number in the **Quantity** field then proceed with checkout as normal. **[Diagram 48]**

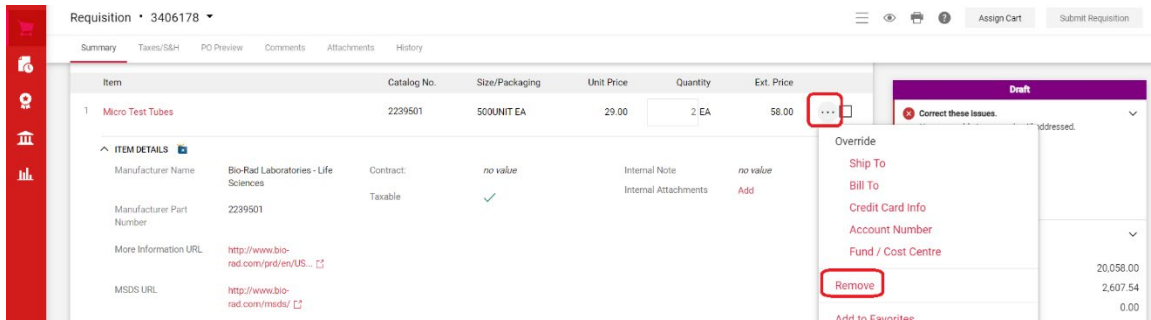
This is possible for most Catalogues. If the **Quantity** field cannot be changed, you will need to remove the line item, return to the Punch-Out site, reselect the appropriate item and quantity and add it to the cart.



**[Diagram48]**

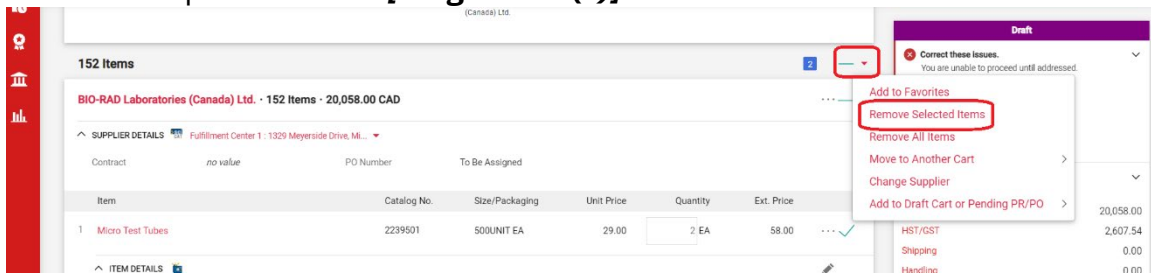
#### Removing Line items

If you wish to remove a line item from the shopping cart, scroll down to the Line Item section and click on the **Ellipsis (three dots)** icon on the right side of the screen beside the **Ext. Price** for the line you want to remove. Select **Remove** from the dropdown options available. **[Diagram 49(a)]**



**[Diagram 49(a)]**

Additionally, if you wish to remove multiple line items, you can click on the checkbox for each line item on the right side of the screen (the check box next to the Ext. Price of the line item) and scroll up above the first line item and click on the small **Red Dropdown Arrow** and click on select **Remove Selected Items** from the dropdown menu. **[Diagram 49(b)]**



**[Diagram 49(b)]**

Finally, if you have been assigned a cart, you can return the whole cart to the Shopper with comments requesting the removal of line items or item quantities, or you can delete the cart altogether. Instructions for Returning and Deleting a cart are in the next section. **[Diagram 50 and 51]**

#### **D. Returning and Deleting Carts**

As a Requisitioner, in addition to **Updating** carts, you can also **Return** a cart to the Shopper that submitted it to you, or **Delete** the cart completely.

If you have reviewed a cart and wish to return it to the Shopper for correction:

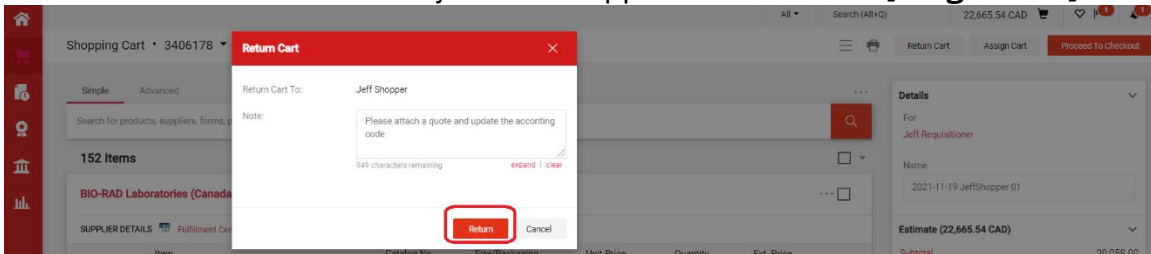
- Step 1.** Click the dropdown arrow next to the Shopping Cart number and select **Return Cart** option from the dropdown list. Alternatively, click on the **Return Cart** button at the upper right side of the screen. **[Diagram 50]**



[Diagram 50]

**Step 2.** You will be asked to enter a reason for the return of the cart, and instructions for what the Shopper needs to fix before resubmitting the cart. The note you leave here will appear in the **Comments** section of the requisition and as part of the **History**.

**Step 3.** Click **Return** when you have completed the note. The cart will be sent automatically to the Shopper for correction. [Diagram 51]



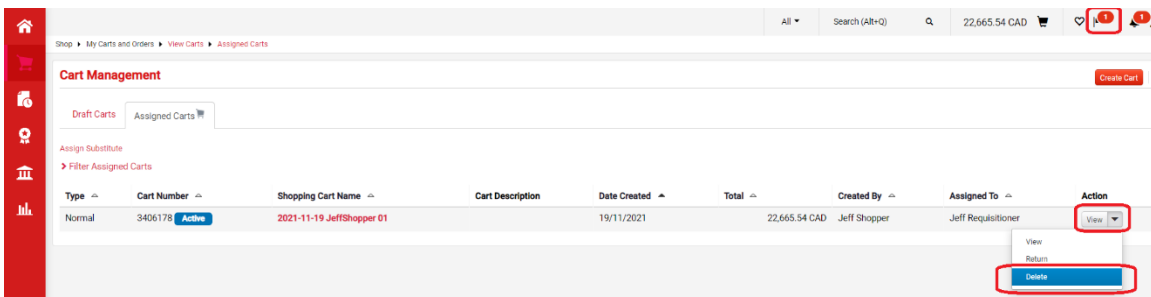
[Diagram 51]

If you have reviewed a cart and wish to **Delete** it completely, ensure you are deleting the correct cart as once you have deleted a cart, you can no longer retrieve it. [Diagram 52]

**Step 1.** From the **Action Items** icon on the **Home/Shop** page, click the **Carts Assigned to Me** option.

**Step 2.** Click the **Delete** button available in the dropdown list on the right of the page.

**Step 3.** You will be asked to enter a reason for deleting the cart. The note you leave here will be sent to the Shopper via an email. Click **OK** when you have completed the note. The cart will be removed automatically from your **Drafts Assigned to Me** list.



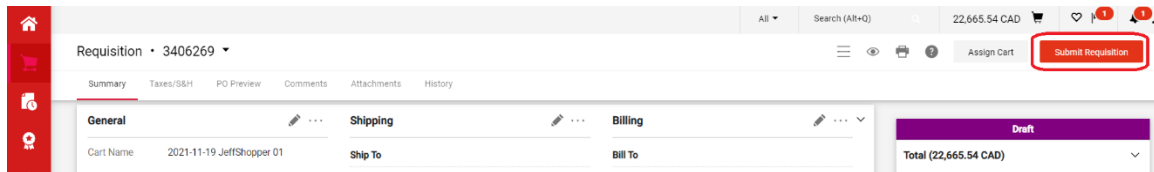
[Diagram 52]

## E. Returned Requisition from Approver

- Step 1.** Returned requisitions will be assigned back to the Shopper. Click on the **Action Items** icon and select **My Returned Requisitions** to open the returned cart
- Step 2.** Select **Comment** tab to view reason for return.
- Step 3.** Make changes as required, and then resubmit the requisition by using the **Assign Cart** button.
- Step 4.** If you cannot make a change, and instead decide to withdraw your cart, then go to **Action Items** and select **My Returned Requisitions**.
- Step 5.** Use the **Delete** option from the **Action** dropdown on the right of the page

## F. Submitting a Cart

Once your **Shipping** and **Accounting Codes** information are entered, review the requisition and click **Submit Requisition**. **[Diagram 53]** The system generates a confirmation message that summarizes the requisition.

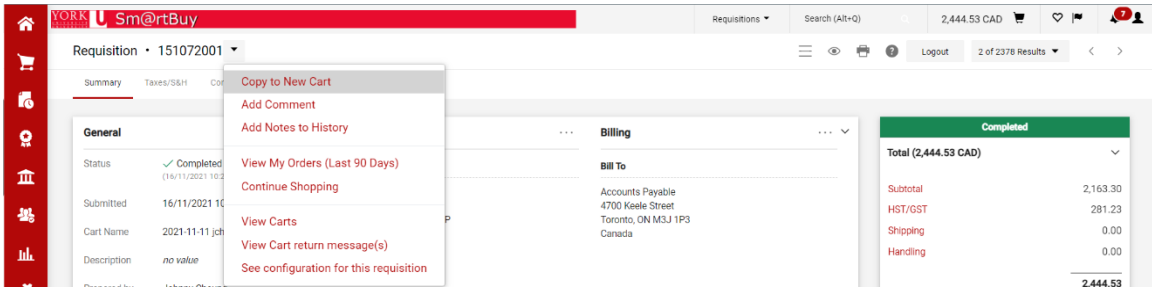


**[Diagram 53]**

## G. Copying Previous Requisitions to a New Cart

- Step 1.** Select **Orders** icon located on the left-hand menu Bar and then select **My Orders- My Requisitions**
- Step 2.** The list of your requisitions displays, select the appropriate requisition number.
- Step 3.** Select **Copy to New Cart** from the **Available Actions** drop-down option available next to the Requisition Number on the left corner of the page. **[Diagram 54]**
- Step 4.** A new shopping cart is created, and all line item(s) and requisition custom information are copied to this new shopping cart. The user is brought to shopping cart page, ready for further action to process the order.



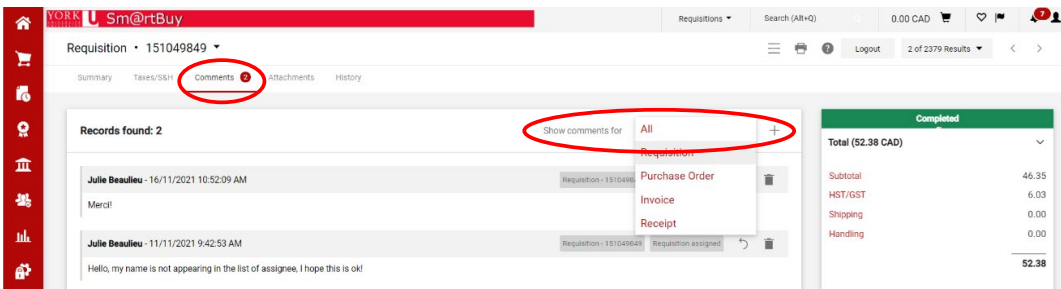


[Diagram 54]

## H. Viewing Document Comments and History

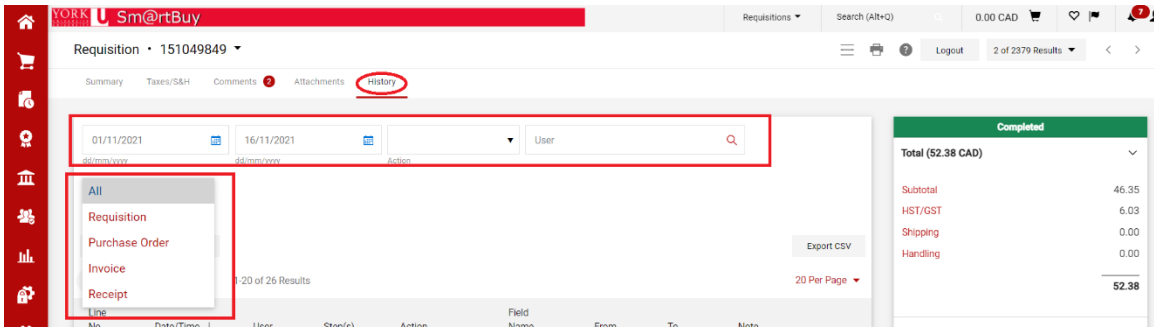
Reviewing the **Comments** and **History** for an order is a common way to track status and view an audit trail of events. Requisitioners can select to view the comments only for the document that is open (the PR, PO, etc.) or, for all associated information for all document types (requisitions, purchase orders, invoices and receipts). This provides the ability to see all related comments on a single comments tab and saves valuable time toggling to different screens.

- Step 1.** Open the document (the PR, PO, etc.). You can find documents by using the **My Requisitions** or **My Orders** links under **Orders** icon on the left hand side, and via keyword search. Once you have found your document, click on the Requisition or PO number hyperlink to open it.
- Step 2.** Go to the **Comments** tab to view comments. [Diagram 55] By default, only those comments specific to the opened document will display. Use the **Show comments for** dropdown menu to view any associated comments on related Invoices, POs and PRs.



[Diagram 55]

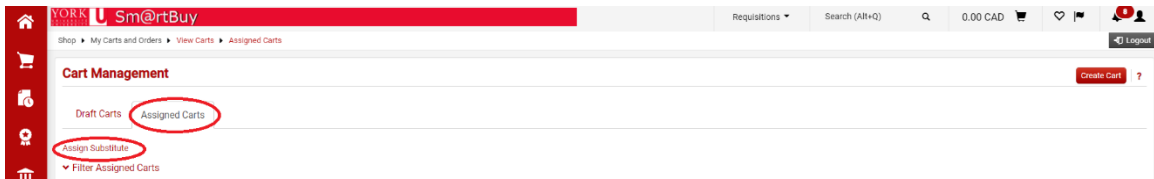
- Step 3.** Go to the **History** tab to view system history. [Diagram 56] By default, only those actions for the open document will display. Use the filter options available to view the history for all associated documents. Enter the applicable details such as start/end date etc. and then choose from the **Document Type** dropdown menu the type of document you want to see history for.



[Diagram 56]

## I. Assigning/Unassigning a Substitute Requisitioner

- Step 1.** Navigate to the **Shop** cart icon on the upper left corner of the screen.
- Step 2.** Click the **My Carts and Orders – Open My Active Shopping Cart- Assigned Carts**
- Step 3.** Click the **Assign Substitute** link, as shown below in Diagram 57



[Diagram 57]

- Step 4.** From the **User Search** popup, enter the criteria to find the user that you would like to assign as the substitute Requisitioner. Once the user criteria are entered, click the **Search** button. Only those with the appropriate role will be displayed on the search results list.

[Diagram 58]

- Step 5.** Select the appropriate user by clicking the **Select** button to the right of the user's name.
- Step 6.** When you are ready to end the substitution, click **End Substitution** on the **Assigned Carts** tab to remove or end the substitution.

User Search - Google Chrome  
 solutions.scquest.com/apps/Router/GenericUserSearch?Tmstmp=1637081843208511&returnFunction=setAssign...

**User Search**

Last Name

First Name

User Name

Email

Department

Position

Role

Results Per Page

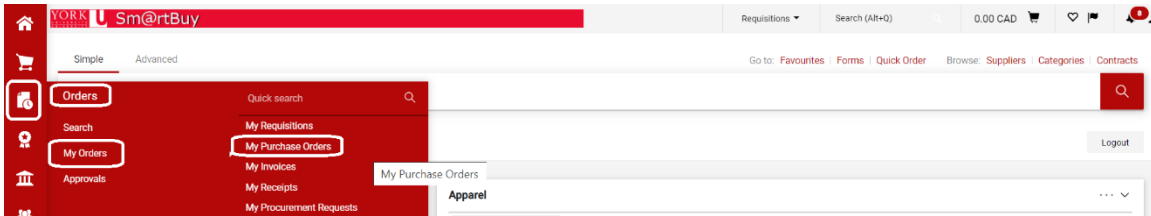
**Search**

[Diagram 58]

### J. Receiving Items (Creating Quantity Receipts) on POs

Receiving is only required for purchase orders greater than or equal to \$5,000. To create a receipt for goods and services you will need to locate the purchase order. To do this:

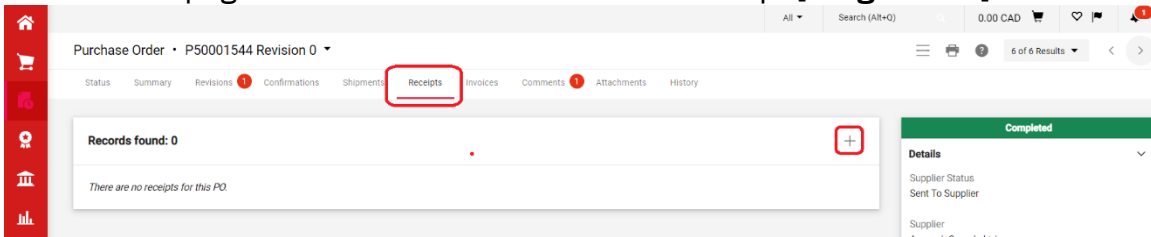
**Step 1.** Select **Orders** icon located on the left side and then select **My Orders– My Purchase Orders**



[Diagram 59]

**Step 2.** Click on the **Order** number you are receiving.

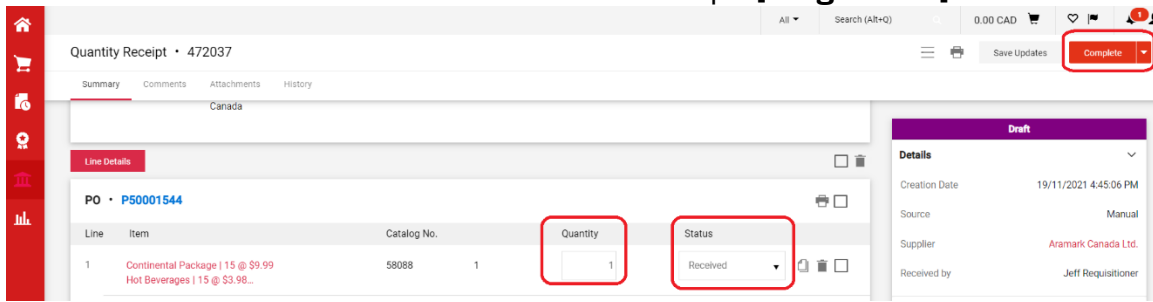
**Step 3.** Select **Receipts** tab from the options available at the top of the page and click on the **+** icon to add receipt [Diagram 60]



[Diagram 60]

**Step 4.** Scroll down to the **Line Details** section, the **Status** by default would be **Received**. Validate the Quantity or update it if needed to match

the number of items received. Click on **Complete** at the top right side of the screen to create the receipt. **[Diagram 61]**



**[Diagram 61]**

**Note:** If you have returned a portion of the order or you have only received a partial amount of the quantity of items ordered, please contact a Sm@rtBuy Administrator.

# APPROVER



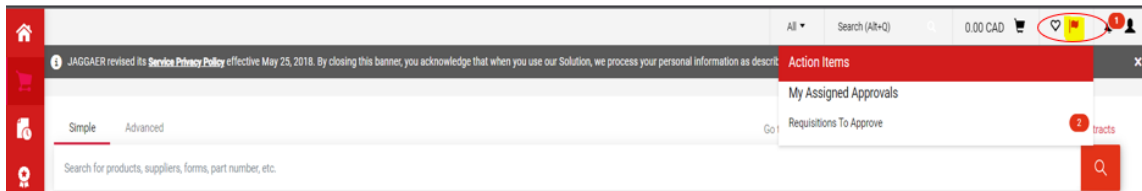
The role of the Approver is to review requisition details; then either approve, reject or return to the Requisitioner and if applicable, or forward approval authority to another Approver.

- A. Reviewing Action Items
- B. Moving Documents to My Approvals Folder
- C. Approving a Requisition
- D. Rejecting a PR
- E. Forwarding a PR
- F. Assigning a Substitute Approver
- G. Adding a Comment
- H. Returning a Requisition
- I. Viewing Approvers

## A. Reviewing Action Items

The **Action Items Flag** icon is located on the top right side of the page.

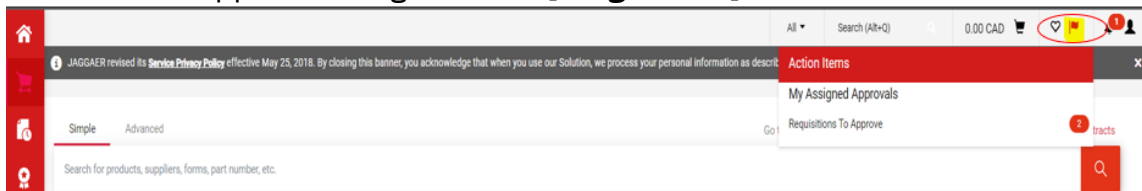
**[Diagram 62]** Click on **Action Items** to view action items for **My Assigned Approvals**. To review and approve new requisitions click on the **Requisitions** under **Unassigned Approval**.



**[Diagram 62]**

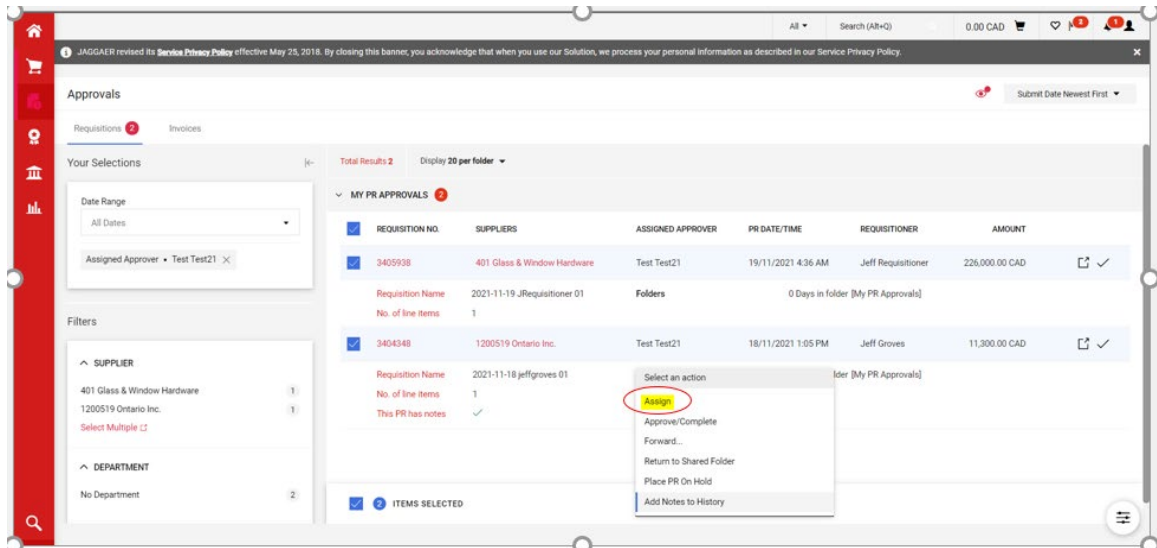
## B. Moving Documents to My Unassigned Requisition/Approvals Folder

**Step 1.** From the **Action items** – click on **Requisitions** under **Unassigned Approval** you will be taken to the appropriate sub-tab in the approval navigation tab. **[Diagram 63]**



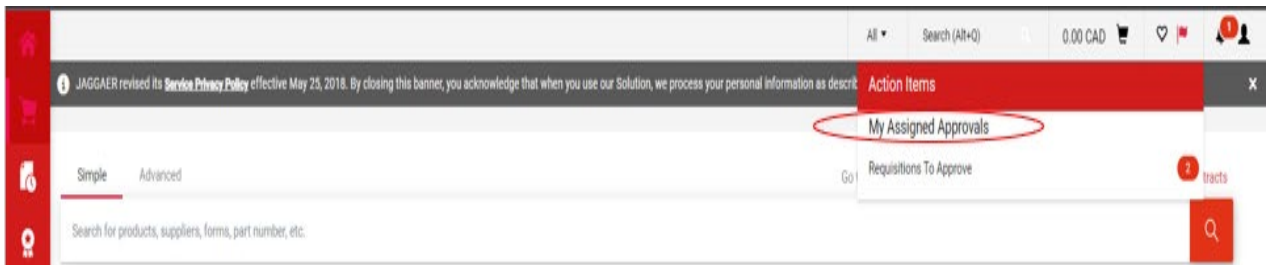
**[Diagram63]**

**Step 2.** To move requisition to **My PR Approvals** folder, click the **check box** and from the **Select an action** dropdown select assign button. **[Diagram 64]**



[Diagram 64]

**Step 3.** The requisition is now in the user’s **Requisitions to Approve** folder. [Diagram 65] To approve requisitions, click on the **Action Item Menu** on the top right-hand side of the page and select **Requisitions to Approve**.



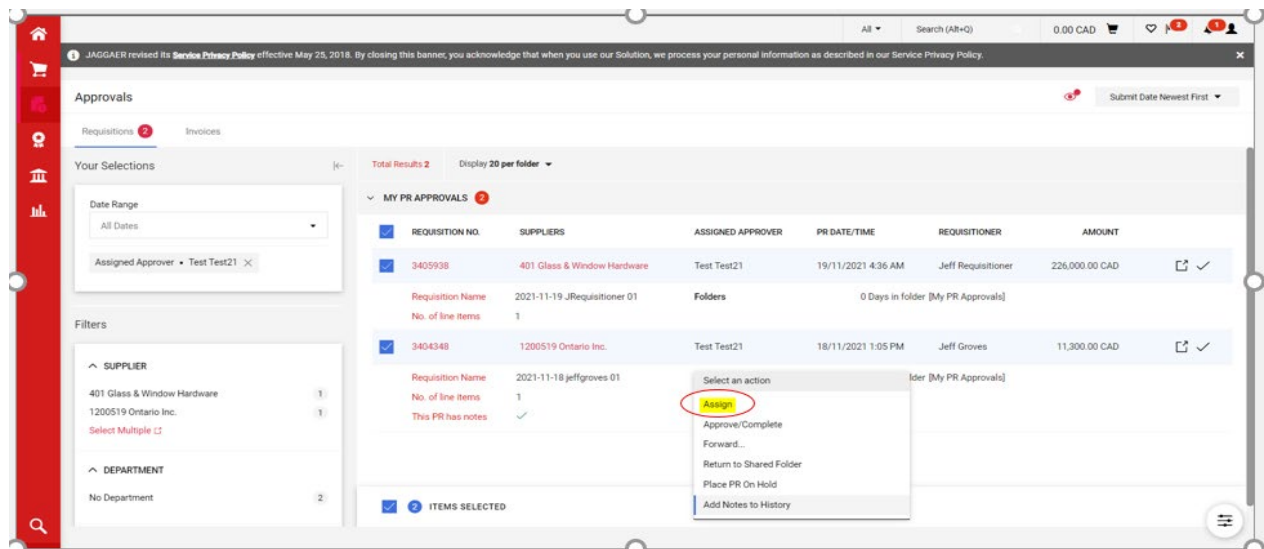
[Diagram 65]

**Step 4.** A list of all requisitions will be displayed. Click on the **Requisition Number** to open and review the requisition before approval.

To quickly move multiple Requisitions to your approval folder:

**Step 1.** Enable the **Select** checkbox for the individual items that you would like to assign to my approvals folder next to the **Action Column** OR enable the checkbox at the Header bar to enable all available line items.

**Step 2.** After you have selected which documents to assign, select the **Assign** option from the **Action** drop-down. **[Diagram 66]**



**[Diagram 66]**

### **C. Approving a Requisition**

After you have moved the item(s) to your approvals folder, the next step is to review the requisition or purchase order for processing.

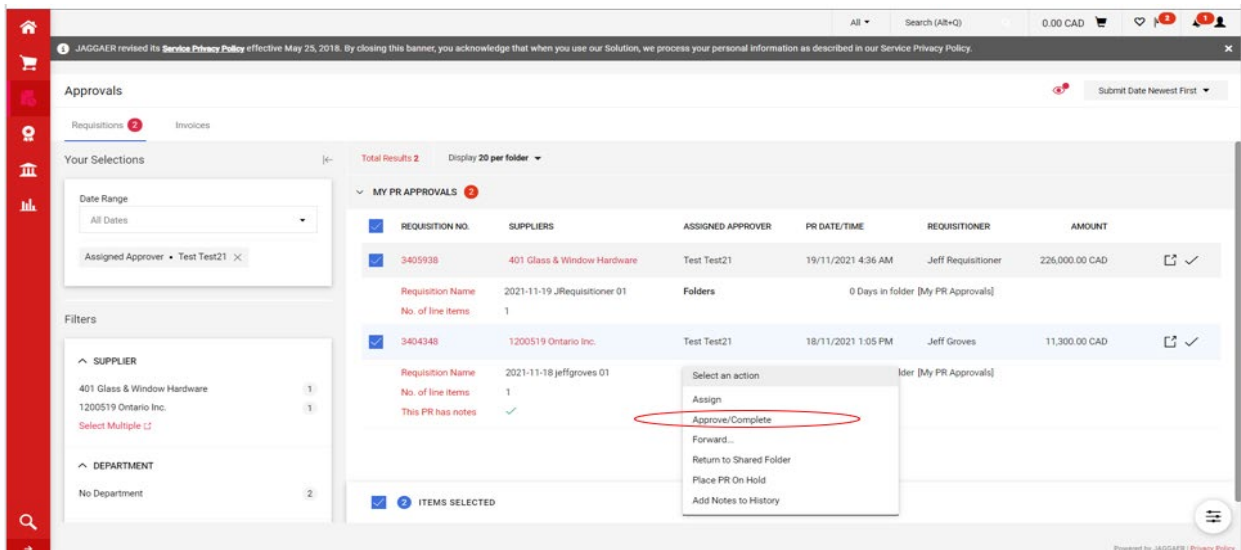
#### **Quick Approval Process**

If you do not need to open a requisition before it is approved:

**Step 1.** Click on the **Requisitions** under **Unassigned Approval** link for a list of requisitions.

**Step 2.** Find the requisition and click on the corresponding checkbox.

**Step 3.** From the dropdown list select **Approve/Complete** and click **GO**. **[Diagram 67]**

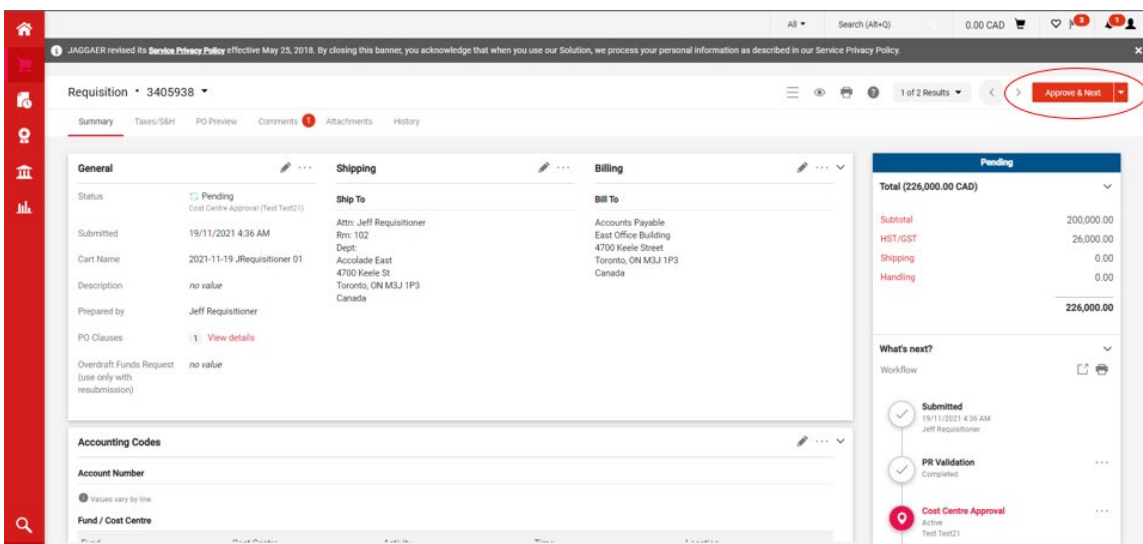


[Diagram 67]

## Standard Approval Process

With standard approvals, the Approver opens the order and reviews the information, then approves the order.

- Step 1.** Click on the **Requisition Number** to open the requisition page.
- Step 2.** Review the information and make updates and comments as needed.
- Step 3.** Select the **Approve & Next** to approve the requisition. [Diagram 68]



[Diagram 68]

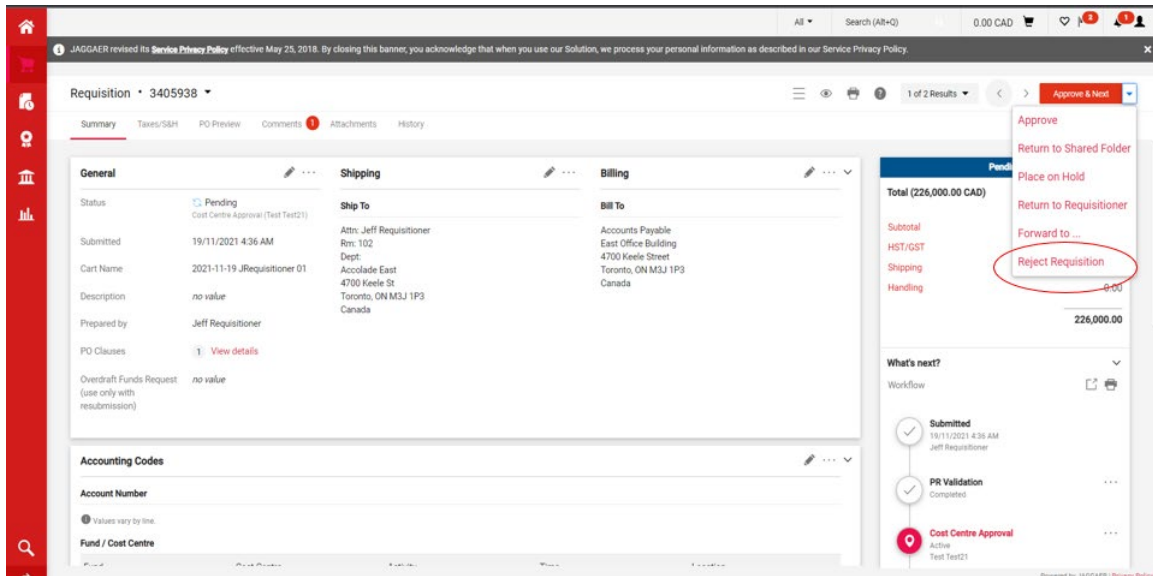


## D. Rejecting a Requisition

The Approver is required to open a requisition in order to reject it. Once a requisition is rejected it cannot be reinstated.

**Step 1.** Follow the Standard Approval Process noted above in Steps 1 & 2.

**Step 2.** Go to the **Available Actions** drop down menu at the top of the Requisition and select **Reject Requisition** to reject the entire requisition. **[Diagram 69]**



**[Diagram 69]**

**Step 3.** Enter a rejection reason in the pop-up box. **[Diagram 70]**

**Step 4.** Select the **Reject Requisition** button to save the comment and complete the process.

The screenshot shows the 'Reject Requisition' pop-up box. It has a red header with the title 'Reject Requisition' and a close button. Below the header is a warning message: 'WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click Reject Requisition or Cancel to leave the PR unchanged.' Below the warning is a text input field labeled 'PR Reject Reason'. The field is empty and has a character count of '1000 characters remaining' and 'expand | clear' options. At the bottom of the pop-up are two buttons: 'Reject Requisition' and 'Close'.

**[Diagram 70]**

## E. Forwarding a Requisition

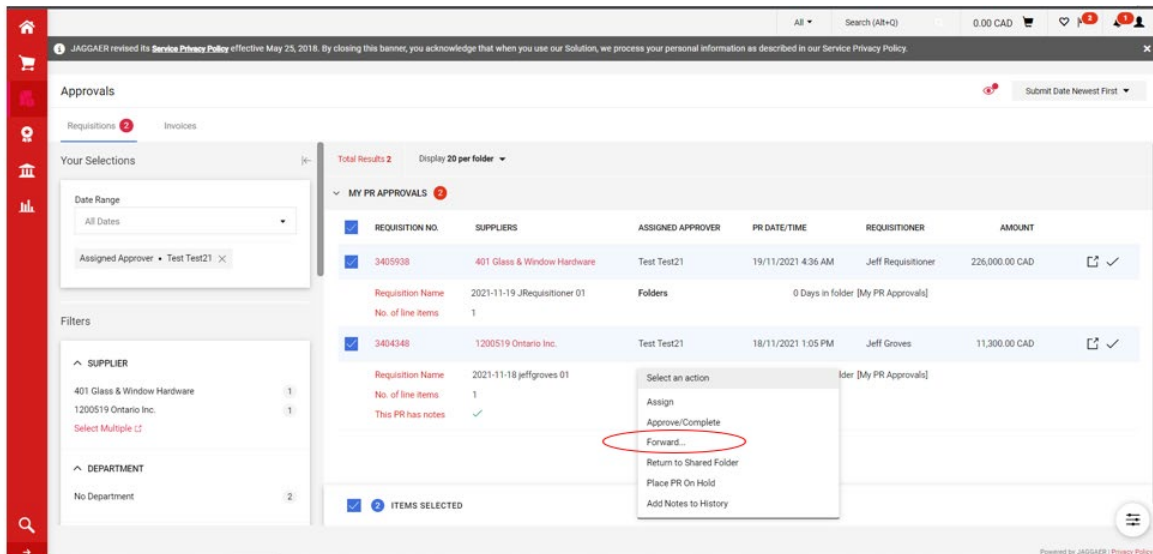
There are two options when forwarding a requisition that has been assigned to you.

**OPTION 1:** If you know you want to forward a requisition or order that has not been reviewed (opened).

**Step 1.** From the **Action Items** on the top right side of the Home Page, select **Requisition to Approve**.

**Step 2.** Select the checkbox on the left side of the folder where the requisition number and click on **Select an action** dropdown.

**Step 3.** Select the **Forward...** option from the drop-down box and click the **Go** button. Skip to the next step #3 from option2. **[Diagram 71]**



**[Diagram 71]**

**OPTION 2:** If you would like to forward a requisition once it has been opened (accessed).

**Step 1.** Follow the Standard Approval Steps 1 & 2. Then follow steps 2-7 below.

**Step 2.** Select the **Forward...** option from the **Available Options** drop-down box and click the **Go** button.

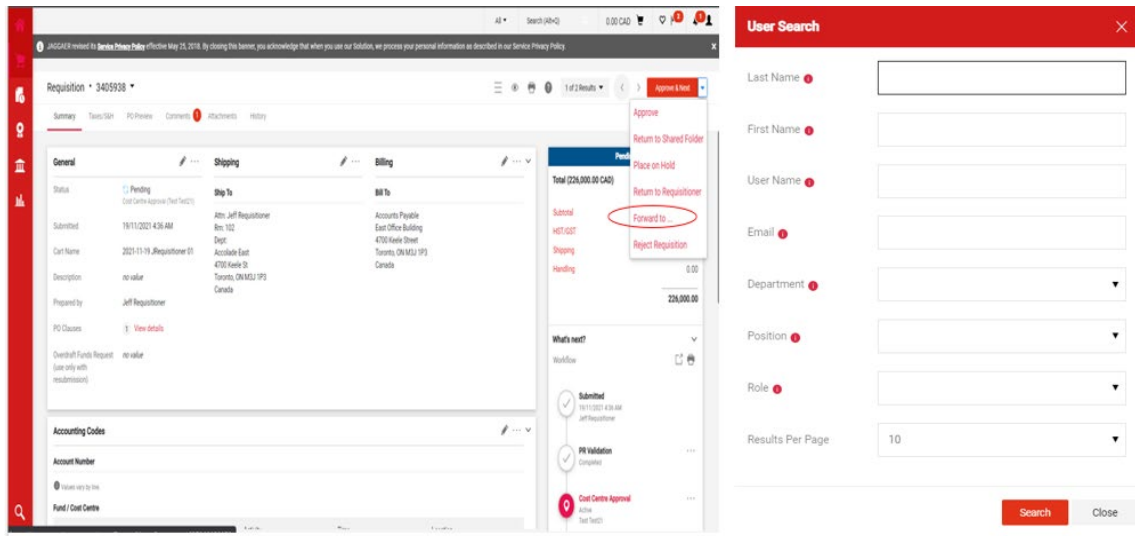
**Step 3.** Enter specific user criteria to find the recipient of the forwarded requisition. **[Diagram 72]**

**Step 4.** Click the **Search** button.

**Step 5.** Select the appropriate user by clicking the Select (+) button to the right of the user's name. Only users with the Approver role will appear on the search results list.

**Step 6.** Enter a note for the user that explains the reason for forwarding the requisition.

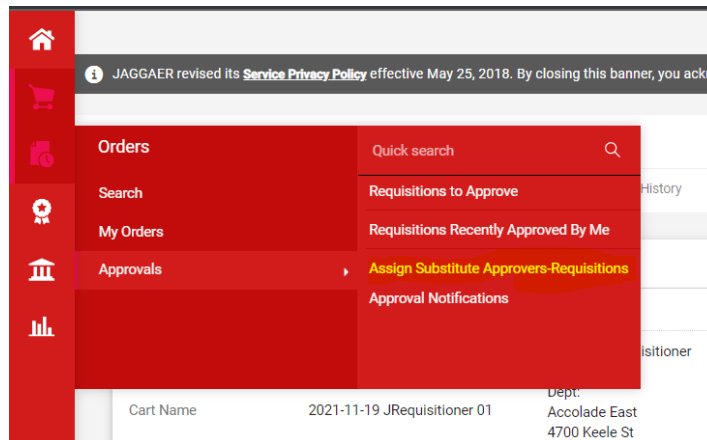
**Step 7.** Click the **Forward** button.



[Diagram 72]

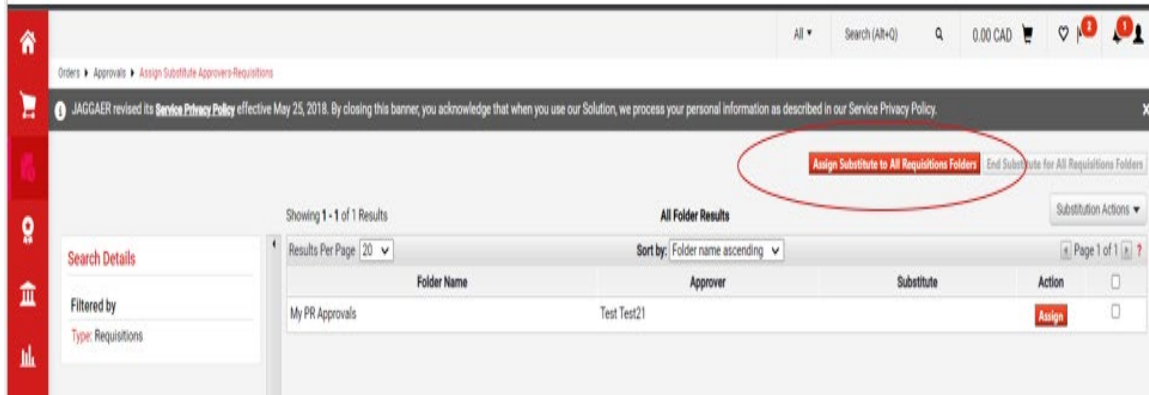
## F. Assigning a Substitute Approver

**Step 1.** Use the **Orders** icon on the left side of the screen, then choose **Approvals** and click the **Assign Substitute Approvers-Requisitions** option. [Diagram 73]



[Diagram 73]

**Step 2.** To assign a substitute for all your workflow folders click the labeled **Assign Substitute to All Requisition Folders** button at the upper right corner of the screen. [Diagram 74]



[Diagram 74]

- Step 3.** Select the checkbox. Include **Date Range for Substitution** [Diagram 75]
- Step 4.** Type the assignee's name into the **Substitute Name** search field, as you type, the system will look for a match. Click on the match for the name you typed.
- Step 5.** Set a date and time for the start and end of this substitution. Once you have completed all fields, click **Assign**.

The 'Assign Substitute' dialog box contains the following elements:

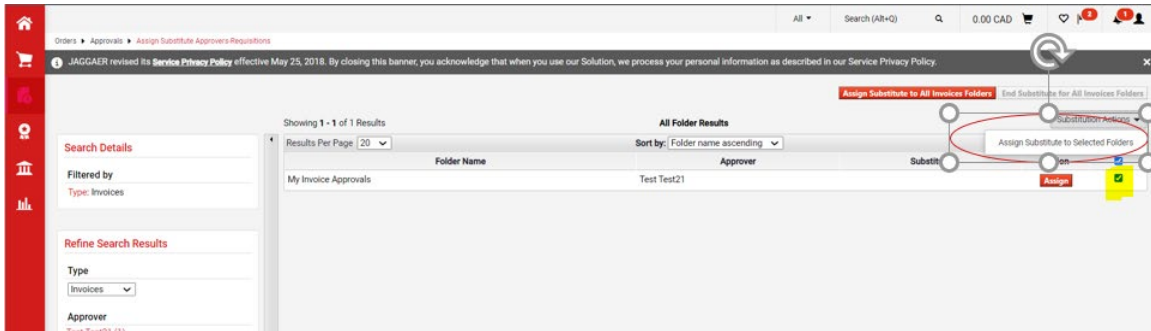
- Include Date Range for Substitution (highlighted with a red circle)
- Substitute Name <sup>\*</sup>: A search field with the placeholder text 'Type to filter...' and a magnifying glass icon.
- Start Date <sup>\*</sup>: A date and time picker field with a calendar icon and a clock icon. Below the field is the format 'dd/mm/yyyy hh:mm a'.
- End Date <sup>\*</sup>: A date and time picker field with a calendar icon and a clock icon. Below the field is the format 'dd/mm/yyyy hh:mm a'.
- A legend at the bottom left indicates that <sup>\*</sup> denotes a required field.
- Buttons at the bottom right: 'Assign' (highlighted in red) and 'Close'.

[Diagram 75]

To assign substitute Approvers for individual folders:

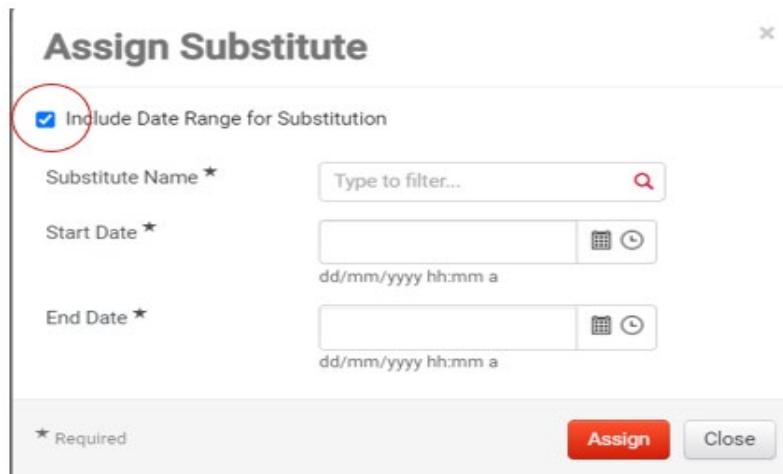
- Step 1.** First you will need to select the check box next to the appropriate cost centre folder.
- Step 2.** Then from the drop-down select **Assign Substitute to Selected Folders**

**[Diagram 76]**



**[Diagram 76]**

- Step 3.** Select the checkbox. **Include Date Range for Substitution.**
- Step 4.** Type the assignee's name into the search popup box, as you type, the system will look for a match. Click on the best match for the name you typed. **[Diagram 77]**
- Step 5.** Once you have a match click **Assign.**



**[Diagram 77]**

The selected substitute will be indicated in the **Substitute** column.  
**[Diagram 78]**

Showing 1 - 1 of 1 Results

**All Folder Results**

Results Per Page: 20 | Sort by: Folder name ascending | Page 1 of 1

Folder Name	Approver	Substitute	Action
My Invoice Approvals	Test Test21	Jeffrey Sperling	Remove

[Diagram 78]

### G. Ending Substitutions

If you did not set a date for the end of your substitution, you have to end it manually.

To end a substitution that is applied to all of your workflow (cost centre) folders, click the **End Substitute for All Folders** button.

To end a substitution for a specific folder, click the **Remove** button in the **Action** column. [Diagram 79]

Orders > Approvals > Assign Substitute Approvers/Requirements

JAGGAER revised its Service Privacy Policy effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.

Assign Substitute to All Invoices Folders | End Substitute for All Invoices Folders

Showing 1 - 1 of 1 Results

**All Folder Results**

Results Per Page: 20 | Sort by: Folder name ascending | Page 1 of 1

Folder Name	Approver	Substitute	Action
My Invoice Approvals	Test Test21	Jeffrey Sperling	Remove

**Search Details**

Filtered by: Type: Invoices

**Refine Search Results**

Type: Invoices

Approver: Test Test21 (1)

Substitute: Jeffrey Sperling (1)

[Diagram 79]

### H. Adding a Comment

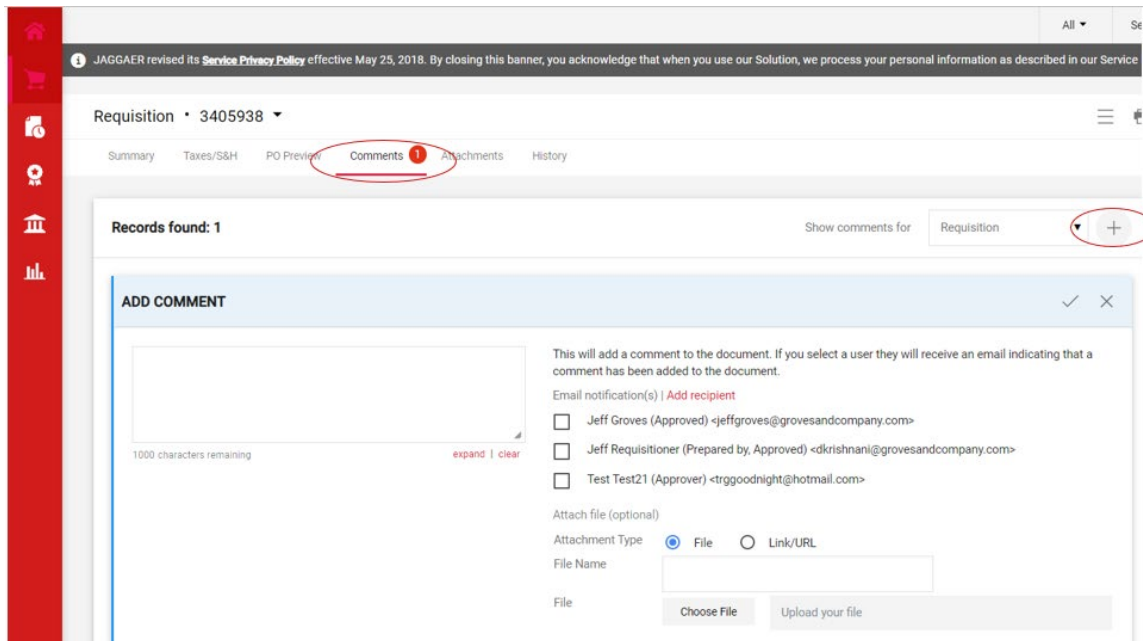
- Step 1.** To add comments to a PR, open the PR and click the **Comments** sub-tab.
- Step 2.** Click the **(+)** to Add Comment. [Diagram 80]
- Step 3.** The **Add Comment** overlay window displays. From this window, you can determine who will be notified via email of the comment, enter a note, and attach one or more supporting documents (if applicable).

- Step 4.** Enable the checkboxes for the users that you would like notified of the comment via email. For example, if you are an Approver, you would probably like to notify the Requisitioner. If you are a Requisitioner responding to a comment, you may want to email the Approver. Click the **Add Email Recipient...** link to find other Sm@rtBuy users to copy via email.
- Step 5.** Enter the note / comment in the text box. Max characters are 1000.
- Step 6.** If you would like to attach a file (e.g. email) or a link for a URL, choose the **File Type**, enter the **File Name** (for reference purposes later), and click **Browse** to select the file.
- Step 7.** Click the ✓ button to save the comment and attachment. The appropriate parties will be emailed.

Once the comment has been added, the number of comments for the PR will display in parenthesis on the comments tab.

**Note:** An attachments tab is now available on the PR. If an attachment was added via a comment, the attachment will reference the comment and will also display the number of comments on the tab.

After the comment is submitted, a history can be found in the **Comments** tab. Users can reply directly to a comment by clicking the **Reply to** button, as shown below.



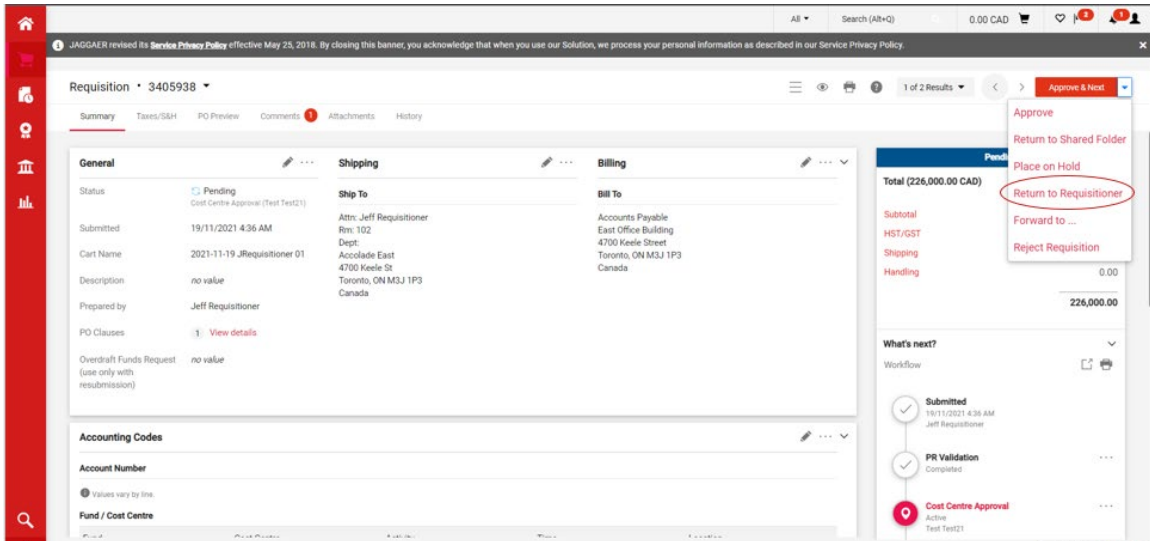
**[Diagram 80]**

## I. Returning a Requisition

Access the purchase requisition. The requisition must be open in order to perform this function.

- Step 1.** Follow Steps 1 & 2 under the **Standard Approval Process**.
- Step 2.** From the **Available Actions** drop-down box in the upper right-hand corner, select **Return to Requisitioner**.

**[Diagram 81]**



**[Diagram 81]**

- Step 3.** From the overlay window display enter the **Reason for the Return**. **[Diagram 82]** The note will be available via the **Comments** tab and will be sent in an email to the Requisitioner.

### Return To Requisitioner

1000 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Save Changes Cancel

**[Diagram 82]**



The Requisitioner can access the requisition from the **Action Items** menu on the home page on the top right hand side of the page, where **Returned Requisitions** are listed in the **My Returned Requisitions**. From there, they can be opened, updated and resubmitted.

## J. View Approvers

- Step 1.** Open the PR document.
- Step 2.** You will be able to locate the workflow on the right, scroll down on workflow to view the PR approvers.
- Step 3.** Double click on the workflow name to view the approver under the workflow. **[Diagram 83]**

The screenshot displays a requisition document for ID 3405938. The document is currently in a 'Pending' state, with a sub-status of 'Cost Centre Approval (Test Test21)'. The 'General' tab provides key information: it was submitted on 19/11/2021 at 4:36 AM, prepared by Jeff Requisitioner, and has a description of 'no value'. The 'Shipping' tab lists the ship-to address as Attn: Jeff Requisitioner, Rm: 102, Dept: Accolade East, 4700 Keele St, Toronto, ON M3J 1P3, Canada. The 'Billing' tab shows the bill-to address as Accounts Payable, East Office Building, 4700 Keele Street, Toronto, ON M3J 1P3, Canada. On the right-hand side, the 'What's next?' workflow is visible, showing a sequence of steps: 'Submitted' (completed), 'PR Validation' (completed), 'Cost Centre Approval' (active and highlighted with a red circle), and 'Director or EO' (pending). The active step 'Cost Centre Approval' is associated with the user 'Test Test21'.

**[Diagram 83]**

## IT REVIEWER



IT reviewers have the same access as a Requisitioner, plus they will:

- Assist all Sm@rtBuy users with IT purchases.
- Help ensure that IT internal policies and procedures are followed in regards to asset management, support, warranty, etc. by approving the requisition accordingly.

Follow the same step as approving a Requisition under the Approver role section of the manual, once you have reviewed the purchase requisition.

## CONTACT INFORMATION

For assistance please contact the Sm@rtBuy eProcurement Administrator at [smartbuy@yorku.ca](mailto:smartbuy@yorku.ca)

For more information visit the Sm@rtBuy website at <http://smartbuy.info.yorku.ca>