SmartNet INSTRUCTIONS

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Approver Instructions

Orders You Need to Approve

The Pending Approval displays only those orders that are awaiting approval, either by a mid- level approver or a top level approver. This page also shows those orders that are currently locked. The ability to view this page depends on the approver type. If you are the individual whose order is awaiting approval, the Pending Approval page does not appear. If you are a mid- level or top level approver, this page is available as long as you are part of the approval group. Orders you have previously approved or denied appear on the Approval History tab.

1. Select My Orders from the pull down menu and choose Order Approval.
2. Click the Pending Approval tab.
3. This tab displays only those orders that are awaiting your review. The Total column displays the order's total, including tax. You can re-sort the orders by clicking the Submitted By, Department, Date, and Purchase Order headings.
4. Click Show Legend to view the status legend detail at the top of the page. To hide the legend information, click Hide Legend.
5. To change approval settings, click the Order Approval Settings link. Set the sort and order information preferences. When finished, click the Back to Approval History link.
6. To view line item information, click ⊞ beside the order. The order information opens.
7. You can approve or deny entire orders or specific line items. You can also modify the existing order. To approve or deny individual line items, go to **Step 8**.
   - To approve or deny all orders, click the "All" check box. Then, click "Approve" or click "Deny". If you deny all orders, you are prompted to enter the reason for doing so.
   - To approve a specific entire order, click the check box corresponding to the order, and click "Approve".
   - To deny a specific entire order, click the check box corresponding to the order, and click "Deny". Enter the reason for declining the entire order. The order is denied and cannot be undone.
8. To approve or deny individual line items, to change an item's quantity, or to add additional items to this order, click "Edit". The line items appear on the Review Orders page. On this page, you can:
   - Click the Long PO box to enter a long purchase order number.
   - Click the Short PO box to enter a short purchase order number.
   - Click the appropriate Shipping Method to use for the order.
   - Click the Shipping Instructions box to enter shipping information.
   - Click the Special Instructions box to enter special instructions on the order, Drop Package at the Back Door, for example.
   - Use the Payment Method Override options to change the payment method to use for this order.
   - In the bottom section of the page, click the Quantity box to change the ordered quantity.
   - To view the item's product information, click the item's number.
   - If the Cost Center Code feature is enabled for your site, you can click the down arrow in the Cost Center box and select the code to assign this item. If available, you can also select Add New and add a new cost center code and description to assign this item.
   - To deny an individual line item, click the Deny check box. When the Reason box opens, click the box and enter the text as to why this item is being denied. You can specify up to 50 characters. Repeat this process to deny each line item.
   - Click "Add New Items" to add additional line items to this order. Enter the item information including any item comments, and click Save to Pending Order. You can continue to add as many items as needed. If you need to search for an item, copy and paste the item number into the pending order as you search for items.
   - If available, click "Add Coupon or Promo" to add a coupon or promotion to this order.
   - When you finish making changes:
     a. Click the "Save Changes" to return to the Approval Web page.
     b. Click "Approve Order" to approve the entire order. Items on the order that are not marked to be deleted are approved.
     c. Click "Deny Order" to deny the entire order. You are prompted to enter the reason why you are denying the entire order.

Order Status

The information appearing on the Your Orders tab depends on the approver type. If you are the individual who placed the order or you are a mid-level approver, the system uses the Your Orders tab to display any orders that you submitted and which still need approval. However, any orders you submitted that fall under the approval limit are not shown. If you are a top level approver, this tab does not display since any orders you place are never subject to approval.

- Select My Orders from the pull down menu and choose Order Approval. The Order Approval page opens, displaying the Your Orders tab. (This tab does not display if you are a top-level approver.)
- This tab shows the status of your pending orders. You can click Show Legend to view the status legend detail at the top of the page. You can view approved, denied, awaiting review, under review and submitted orders.
- To view line item information, click ⊞ beside the order to view.
- The order detail opens, displaying additional information, including the reason the order was denied. In some cases, the entire order could be under review, but one item could have already been denied.

Approval History

The Approval History tab displays the orders that were submitted for approval. If you are the individual whose order was submitted for approval, this tab shows orders that were either approved or denied. This helps you quickly track your orders. If you are a mid-level or top level approver, this page shows any orders that you approved or denied as part of the approval process. If the order was approved but now requires further approval, it appears as awaiting approval. If an order was denied, you can also select it and re-submit it for approval in this tab.

Note: When re-submitting an order for approval, you can delete an item or change an item's quantity. However, you cannot add additional items to the order.

1. Select My Orders from the pull down menu and choose Order Approval.
2. Click the Approval History tab.
3. This tab displays any orders that have been approved or denied. The Total column displays the order's total, including tax. You can re-sort the orders by clicking the Submitted By, Department, Date, and Purchase Order headings.
4. Click Show Legend to view the status legend detail at the top of the page. To hide the legend information, click Hide Legend.
5. To change approval settings, click the Order Approval Settings link. Set the sort and order information preferences, including the ability to view orders up to 180 days old. When finished, click the Back to Approval History link.
6. To view line item information, click ⊞ beside the order. The order information opens.
7. To view history details, click 🛈 beside the order to view. The Detail page opens. If this order is awaiting approval, hover the cursor over 🛈 in the Status section on the page. The name of the approver for which this order is awaiting approval is displayed. When finished viewing, click Back.
8. If an order has been denied, you can re-submit the order for approval. To do so, click the check box beside the denied order.
9. After the page refreshes, click "edit". The line items appear on the Review Orders page. On this page, you can:
- Click the Long PO box to enter a long purchase order number.
- Click the Short PO box to enter a short purchase order number.
- Click the appropriate Shipping Method to use for the order.
- Click the Shipping Instructions box to enter shipping information.
- Click the Special Instructions box to enter special instructions on the order, Drop Package at the Back Door, for example.
- Use the Payment Method Override options to change the payment method to use for this order.
- In the bottom section of the page, click the Quantity box to change the ordered quantity.
- To delete an individual line item, click the Delete check box corresponding to the item to remove. Repeat this process to delete each line item.
- To view the item's product information, click the item's number.
- When you finish making changes, click "Check Out" to resubmit the order.

Out of Office Approval Forwarding

1. Click Out of Office Approval Forwarding. (This is the picture of the arrow next to the words "Orders Pending Approval" at the top right hand side of the page.) The Approval Forwarding page opens.
2. If this feature has not been activated, you can enable it by clicking the Enable Approval Forwarding button.
3. Click the Start Date and End Date boxes to enter the beginning and ending dates and times for the approval forwarding. You can also click 🗓 to select the date using the calendar, and 🕐 to select the time using a clock. Leave these boxes blank to not set a beginning and ending date and time. Forwarding will continue until you remove the setting. Then click "Next"
4. Click the down arrow in the Available Users box and select the individual to whom the orders are forwarded. You can choose more than one, but you must select at least one approver for the Approval Forwarding feature to be activated.
5. Click Assign Temporary Approver. The user's information appears in the bottom of the page, displaying the name, email address, and user name.
6. Click the down arrow in the Available Users box to select another individual, if necessary. Continue to add as many individuals as needed. To remove an individual from the list, click the name to highlight and click ✖.
7. When all the individuals to whom the orders are to be forwarded are selected, click Finish.

Order Approval Settings

1. Click "Order Approval Settings" button to change the following:
- Sort Preference
- Sort Order
- Display approved/denied/submitted orders for the desired period of time.

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