

# WRIGHTBUY E-PROCUREMENT PROGRAM

## APPROVER TRAINING MANUAL



WrightBuy is the e-procurement site that took the place of the Self Service Requisitions utilized in Banner. The new system is much more efficient in that many items may be ordered from electronic catalogs that have our contract pricing shown for all items.

When items are ordered from the catalogs, the descriptions will no longer have to be manually keyed on a requisition, as they will automatically populate to the order that will be electronically sent to the vendor when under the bid limit. Also, users are no longer limited to 5 line items as in the Banner requisition system.

By using the catalogs, users will be assured of receiving the best possible pricing based on negotiated contracts that were based on annual spend. Thus whether you are buying one or one hundred of an item, you will receive the most favorable pricing. As a result of using the WrightBuy portal, it will not only provide us the best pricing, but be capable of providing much better contract usage reporting than in the past.

Requirement for items or services that do not have catalogs from which to buy, will have an electronic requisition or "Form" to allow the creation of a non-catalog requisition from which a purchase order can be created by the Purchasing department. All the orders will continue to have electronic approval with the added benefit of having the ability to scan back-up information to be sent with the requisition prior to its review.

# WrightBuy Approver Training

WrightBuy is Wright State's new procurement system that will be used to initiate purchase requisitions by one of the following methods:

## **Punchout catalogs**

You may order using Punchout catalogs from Office Depot, Apple, Pomeroy, Fisher Scientific, Sigma-Aldrich, Invitrogen, Grainger, and VWR Scientific. Items ordered through the Punchout catalogs have contracted prices negotiated by the WSU Purchasing Department to offer the best pricing.

## **Non-Catalog vendors**

You can create requisitions for other vendor orders greater than \$1,000 which requires various levels of departmental and special approvals.

## **Procard orders**

The system can accommodate using a University Procard for Punchout vendors up to the card transaction limit for orders which do not require departmental or university approvals. ***You are responsible for ensuring you do not enter orders over the credit card limit.*** The system will not prevent you from entering an order over the procard limit, but the vendor will have the transaction rejected when sending through the credit card payment.

## **Other forms**

### *Standing/Blanket Order*

Used for creation of standing orders and blanket orders. The requisition will pass to Banner as a requisition, not a purchase order. Purchasing creates the purchase order using the existing number sequence for blanket and standing orders. Use only when multiple payments are to be made throughout the term of the purchase order.

### *Change Order Request*

Used when a change is needed to an existing purchase order. User will submit the Change order via WrightBuy which will pass to the Banner system as a requisition. Purchasing will make the change to the purchase order in Banner and submit it to the vendor. Purchasing will also make the change to the original purchase order in WrightBuy to match Banner.

### *Check Request*

"Check only" form is used to request payment for an invoice over \$1,000 which does not require a purchase order. (Wright Way policy #5401.10) It may be necessary to use this form to pay a vendor if the department has not followed University policy and placed a verbal order in excess of their buying authority.

## WrightBuy Login

There is a link in WINGS Express under the Finance tab: “Create and Approve WrightBuy Requisitions”

Figure 1 shows the WrightBuy Login screen that you will see when you enter the system. Simply enter your Novell User Name and Password.

WSU Services  
WrightBuy Logon

User Name:   
Password:

Submit Cancel Reset

Note,

- Your Campus User Name is ... For example: w001wln
- If you have questions, contact the CaTS Help Desk at (937)775-4827 or stop by 025 Library Annex.

For technical support, contact the [Help Desk](#).

CaTS  
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Figure 1

Once you login, this is the home page approvers will see.

On the Home Page there is a **Message Box** which will keep you updated on any changes to the system.

You can access any requisition you need to approve in the **Review Box**.

There are links to useful **Resources**.

WRIGHTBUY e-procurement Larry Fox profile | logout Select Draft Cart or Add Item to Cart

Home Search for PO No. Go

home carts approvals history profile contracts

desktop

Welcome Larry Fox

WRIGHTBUY Message ?

Welcome to the Wright State University  
WrightBuy e-procurement System  
User Acceptance Testing  
Email [purchasing@wright.edu](mailto:purchasing@wright.edu)

Quick Links: s

Review ?

- My Requisitions
  - Total Requisitions: 0
- History
- Draft Carts
- My PR Approvals
  - Active: 0
  - Pending: 0
- Level 1: NWS555 (Network Services): (All Values)
  - Not Assigned: 3
  - Pending: 3
- Search Results Exports
  - Completed Exports

My Resources ?

- Recent Enhancements
  - Product Timeline
  - SelectSite v7.1 Release Notes
  - SelectSite v7.1 Release Preview Notes
- email- [purchasing@wright.edu](mailto:purchasing@wright.edu)
- phone-

You can also access the requisition approval screen by clicking on the approval tab.

You can access any requisitions you need to approve at any level.

## APPROVING A PURCHASE REQUISITION

To approve a Purchase Requisition (PR) click on the org or level folder that shows you have PRs pending. Clicking on the level folder will take you to the **Approval – Requisitions** screen. Click on the **View** link next to the PR number to view and approve the PR.

The screenshot shows the WrightBuy e-procurement interface. At the top, the user is logged in as Larry Fox. The main navigation bar includes 'home', 'approvals', 'history', 'profile', and 'contracts'. The 'Approvals - Requisitions' section is highlighted with a red circle. Below this, there are options to filter requisitions and a table of pending requisitions. A blue callout box points to the 'view' link for requisition 122414.

| Requisition No. | State | Priority     | PR Date/Time | Requisitioner      | Amount         | Action       | Select |                          |
|-----------------|-------|--------------|--------------|--------------------|----------------|--------------|--------|--------------------------|
| 122415          | view  | Not Assigned | Normal       | 4/26/2007 10:57 AM | Chris Watson   | 1,900.00 USD | Assign | <input type="checkbox"/> |
| 122414          | view  | Not Assigned | Normal       | 4/26/2007 10:57 AM | sherrill davis | 1,900.00 USD | Assign | <input type="checkbox"/> |
| 120766          | view  | Not Assigned | Normal       | 4/17/2007 10:23 AM | Nancy Pestian  | 4,900.00 USD | Assign | <input type="checkbox"/> |

**NOTE:** More than one approver can be assigned to approval folders at any level, but only one person in each level need approve (see page 7 for a description of approval levels). **Any approver may make necessary changes or corrections to the order as it moves through the review process.**

When viewing the requisition, the two main sections include the **Header** and the **Supplier/Line Item Detail**.

**Summary - Requisition 122414**

Available Actions: Assign and approve/complete step

After reviewing the PR, drop down to "Assign and approve/complete step" and then click "Go".

**Supplier / Line Item Details**

| Product Description      | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price          |
|--------------------------|------------|------------------|------------|----------|---------------------|
| 1 chair                  | 12345      | EA               | 350.00     | 4 EA     | 1,400.00            |
| 2 Table                  | 45678      | EA               | 500.00     | 1 EA     | 500.00              |
| <b>Supplier subtotal</b> |            |                  |            |          | <b>1,900.00 USD</b> |
| <b>Subtotal</b>          |            |                  |            |          | <b>1,900.00</b>     |
| <b>Total</b>             |            |                  |            |          | <b>1,900.00 USD</b> |

**The Header section includes**

- General area which includes status of the PO, when it was submitted, the cart name, description, priority, and who prepared it.
- Shipping information
- Billing information
- FOAPAL information
- Internal Notes – these notes stay within the WrightBuy system
- External Notes – these notes will go forward with the PR into the Banner system

**The supplier/ line item detail section includes**

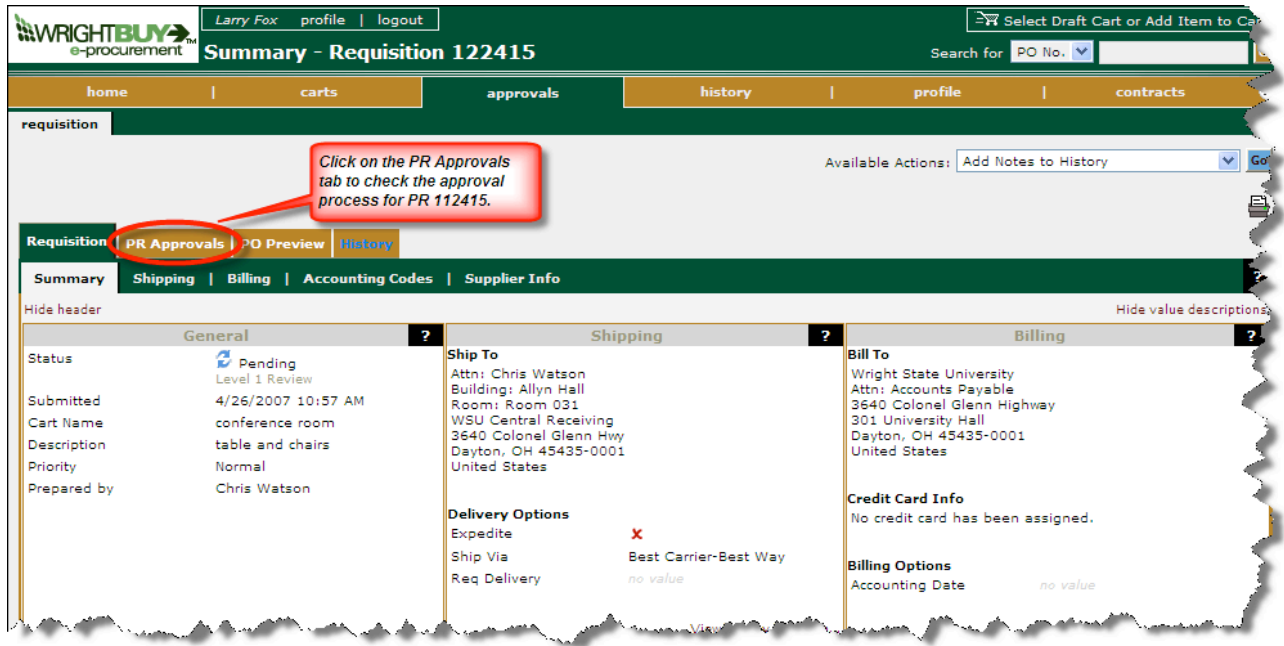
- The vendor name
- Descriptions, quantities, and costs of items being ordered
- Contract and quote numbers if applicable
- Purchase Order number after it has been assigned

If the PR is free from error and ready for approval, the approver need only go to the top right hand corner of the PR and at **Available Actions** drop down to **Assign and approve/complete step** and click **Go**.

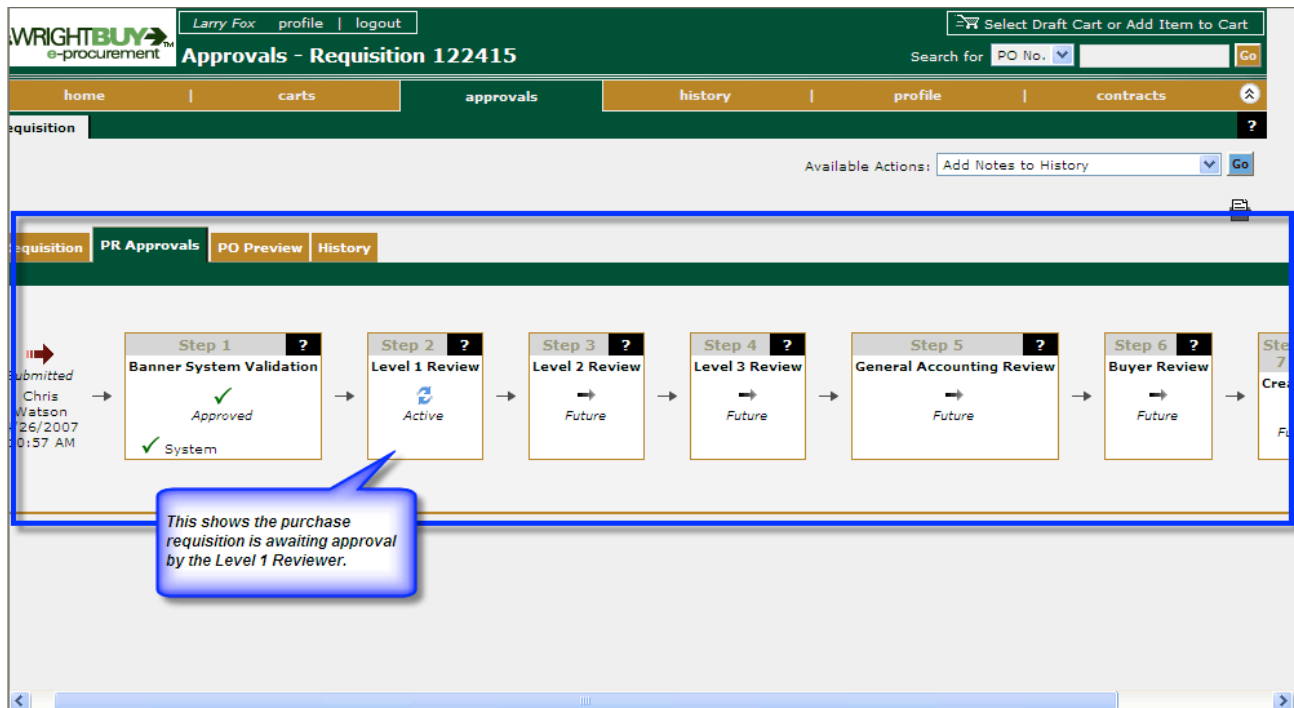
The screen will return to the Approvals – Requisition screen and the approved requisition no longer appears in the list.

## PR APPROVAL FLOW

At the Approvals – Requisition screen, click on the **view** link next to the PR number. The Summary – Requisition screen will appear. To review the approval process, click on the **PR Approvals** tab to the right of the requisition tab.



There will be multiple Approval Review Levels and each must be approved before it moves on to the next level. Once the form has been approved by that level, the approver's name will appear in the box.



Possible approval scenarios include:

- Banner System Validation just checks that *valid* FOAPAL elements have been used. It does not check for an *appropriate* FOAPAL being used for the commodities.
- The Organization and Level 1, 2, and 3 Reviewers were established by the department's Business Manager.
- Workflow Reviewers will appear if the requisition is using Foundation or Grant funds.
- IT Review will appear if the order is for computer equipment not purchased through Pomeroy or Apple.
- Buyer Review will appear for Non-Catalog Form orders and Punchout orders over \$25,000.
- General Account Review (Controller's Office) will appear on all orders.
- Printing Services will review orders for copiers. (These should only be purchased through Printing Services.)
- Environmental Health & Safety will review forms if they include hazardous chemicals.
- Lab Animal Resources (LAR) will review orders involving live animals. (These should only be purchased through LAR.)

### ***MAKING CHANGES TO PURCHASE REQUISITIONS – ASSIGN TO MYSELF***

When reviewing any requisition, if the approver sees something that needs to be changed or corrected, they can make the change before approving the document *if they assign it to themselves first*. When you assign the PR to My PR Approvals you are the only approver who may take action on the PR. For example, if you know there is a PR in the Level 1 folder that you want to be sure to approve, assign it to yourself so no other approvers in Level 1 can take action on it.

At the Summary – Requisition screen the approver should use the Available Actions dropdown box to **Assign to myself** and then Click **Go**.

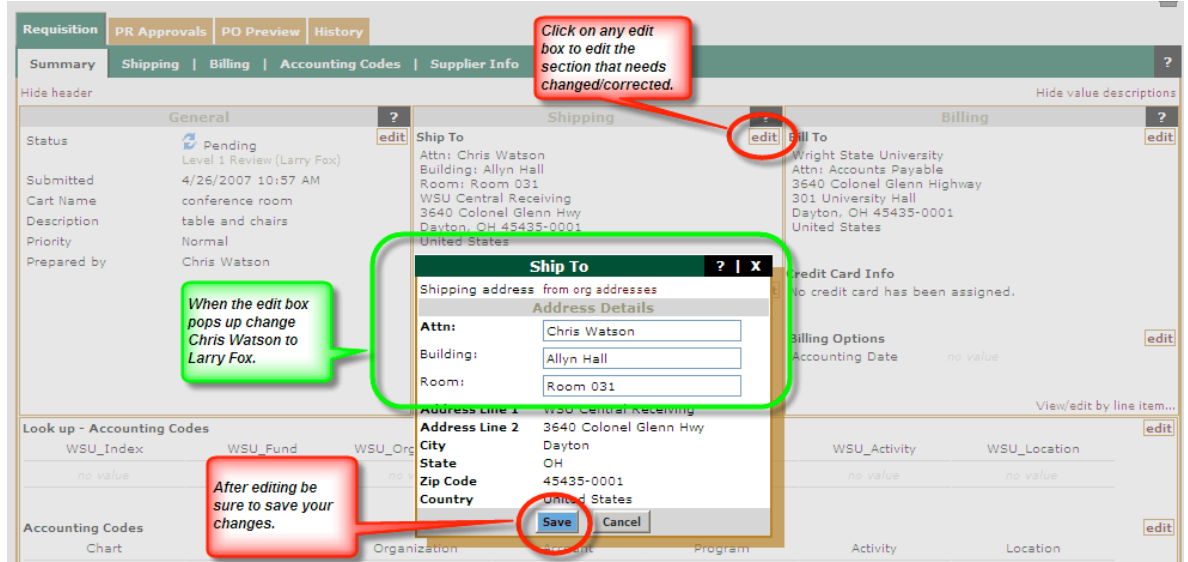
The screenshot displays the WrightBuy e-procurement interface for requisition 122415. The 'Available Actions' dropdown menu is open, showing 'Assign to myself' as the selected option. A red callout box highlights this dropdown with the text: "Select the available action to 'Assign to myself' in order to change/correct a PR." The main content area shows a summary of the requisition, including status (Pending), submitted date (4/26/2007 10:57 AM), cart name (conference room), description (table and chairs), and shipping/billing information for Wright State University.

| General                                    | Shipping  | Billing  |
|--|---|--|
| <b>Status</b><br>Pending<br>Level 1 Review | <b>Ship To</b><br>Attn: Chris Watson<br>Building: Allyn Hall<br>Room: Room 031<br>WSU Central Receiving<br>3640 Colonel Glenn Hwy<br>Dayton, OH 45435-0001<br>United States | <b>Bill To</b><br>Wright State University<br>Attn: Accounts Payable<br>3640 Colonel Glenn Highway<br>301 University Hall<br>Dayton, OH 45435-0001<br>United States |
| <b>Submitted</b><br>4/26/2007 10:57 AM     | <b>Delivery Options</b><br>Expedite<br>Ship Via: Best Carrier-Best Way<br>Req Delivery: no value  | <b>Credit Card Info</b><br>No credit card has been assigned.   |
| <b>Cart Name</b><br>conference room        |   | <b>Billing Options</b><br>Accounting Date: no value  |
| <b>Description</b><br>table and chairs     |   |  |
| <b>Priority</b><br>Normal                  |   |  |
| <b>Prepared by</b><br>Chris Watson         |   |  |

For example: When reviewing PR 122415 the Approver notices that the requestor put the wrong name on the Ship To Attention line and would like to correct this.

The Summary – Requisition screen now shows **Edit** boxes for each section that may be edited.

Click on the **Edit** box. In the pop-up window, change the name and Click **Save** to save the change.

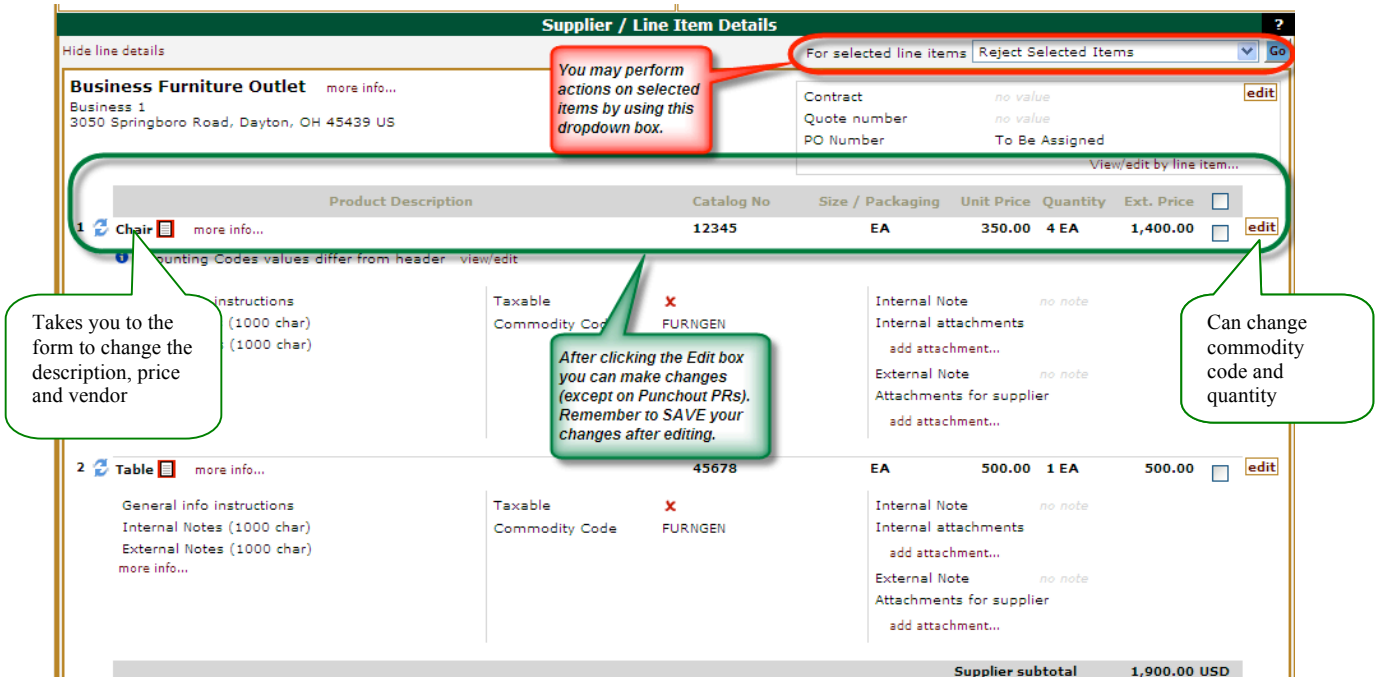


In the Supplier/Line Item Detail section of the PR you may also make changes to each line item.

To change the commodity code or quantity: click on **Edit** to the right of the item. In the pop-up window make the changes, then click on **Save**.

To change the item description, the price, or the vendor: click on the line item description. This will take you to the form that was used where you can make the changes, then click on **Save**.

To reject an item, click the check box to the right of the item, then select the action Reject selected items by **For Selected Line Items** and then click on **Go**. Reject selected items – makes the quantity and price zero.



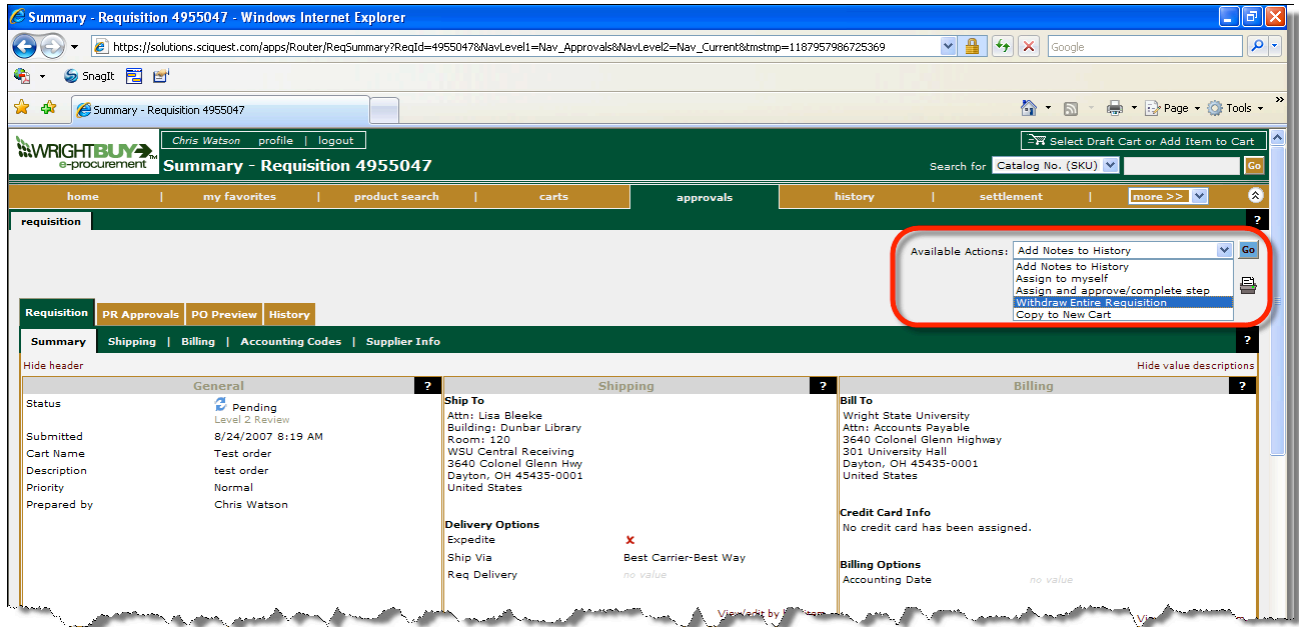
After all changes/corrections have been made, return to the Available Actions box at the top right corner, select **Approve/Complete Step** and click **Go**.



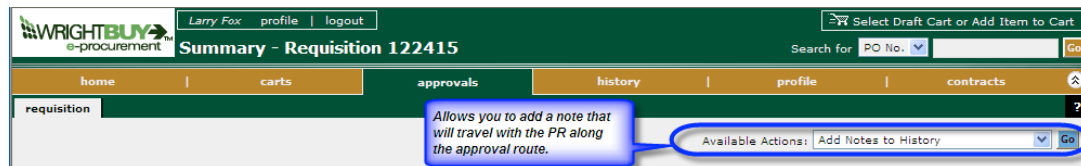
## DROPDOWN BOX OPTIONS

### ➤ At the Summary – Requisition Screen

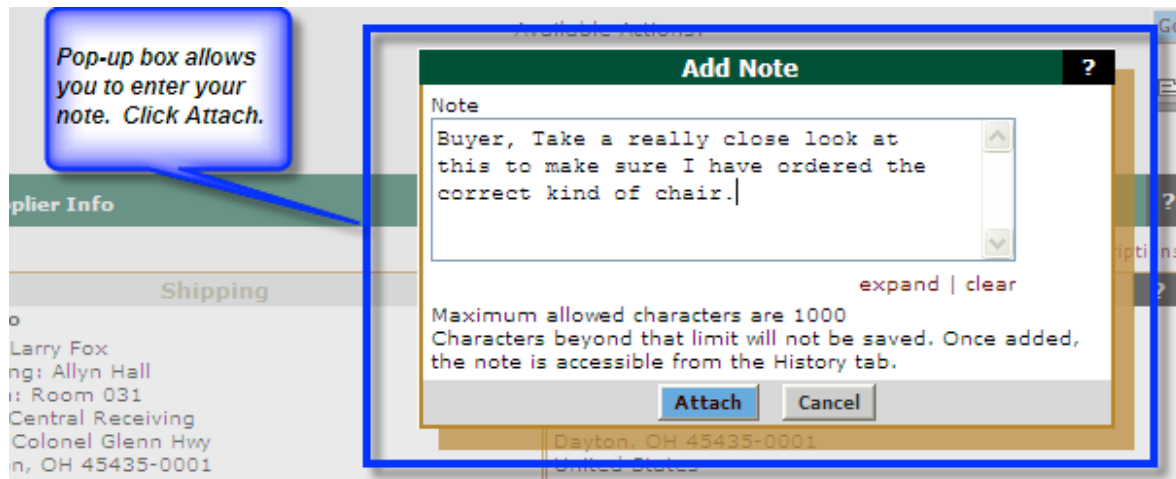
- Available Actions:
  - Add Notes to History
  - Assign to myself (performed above when making changes to the PR)
  - Assign and approve/complete step (performed above when approving the first PR)
  - Copy to New Cart (to start new order)



To add a note to the requisition (like adding a sticky note) which can be viewed in the History:



Select “Add Notes to History” and Click “Go”.



To view the note:

At the Summary – Requisition screen click on the **History** tab. This will show any notes and/or changes that have been made to the PR.

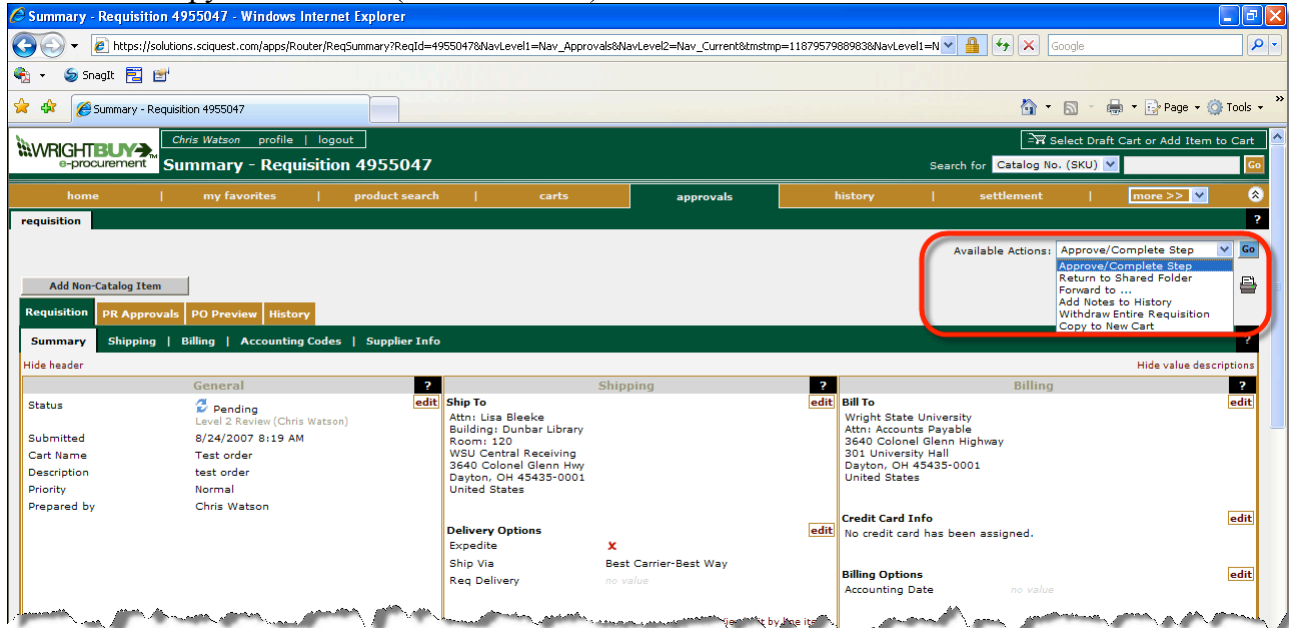
### Copy to New Cart

Results of the Available Actions Dropdown box when you choose to “Copy to New Cart”.

## DROPDOWN BOX OPTIONS

### ➤ At the Summary – Requisition Screen after an Approver has chosen to “Assign to myself”

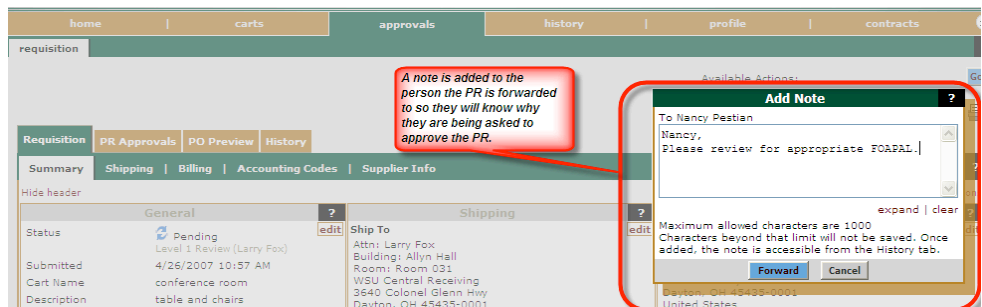
- Available Actions:
  - Approve/Complete Step (covered above)
  - Return to Shared Folder – this removes the PR from the “My PR Approvals” folder and returns it to the appropriate Level folder
  - Forward to... - option will forward the PR to another user for approval. The person forwarding the PR can make a note of why they are forwarding but will **not** have the option to approve the document, only the person it has been forwarded to.
  - Add Notes to History (covered above)
  - Copy to New Cart (covered above).



### Forwarding a requisition to another person:

Select **Forward to** and click on **Go**. Type the person’s first *or* last name and click **Search**. After typing a note to the person the PR is being forwarded to, click **Forward**.

The approver forwarding the PR will not have access to it anywhere else in the approval route.



## DROPDOWN BOX OPTIONS

### ➤ At the Approvals – Requisitions Screen for My PR Approvals

- Apply Actions to Selected PR(s) in My PR Approvals:
  - Approve/Complete (covered above)
  - Forward... (covered above)
  - Add Notes to History (covered above)
  - Return to Shared Folder (covered above)
  - Remove Notifications – After you have taken action on PRs a notification remains in My PR Approvals. If you do not wish to retain the notifications, you may select PRs to be removed by clicking the select box to the right of the PR, choosing Remove Notifications, and clicking “go”.
  - Remove All Notifications – Choosing this option and clicking “go” will remove all notifications from the My PR Approvals folder.

The screenshot shows the WrightBuy e-procurement interface. The user is logged in as Chris Watson. The main navigation bar includes 'Approvals - Requisitions'. The 'My PR Approvals' tab is active. A dropdown menu is open over the 'Apply Action to Selected PR(s)' button, showing the following options: Approve/Complete, Forward..., Add Notes to History, Return to Shared Folder, Remove Notifications, and Remove All Notifications. The 'Remove Notifications' option is highlighted. The screen displays a table of requisitions with columns for Requisition No., State, Priority, PR Date/Time, Requisitioner, Amount, and Action.

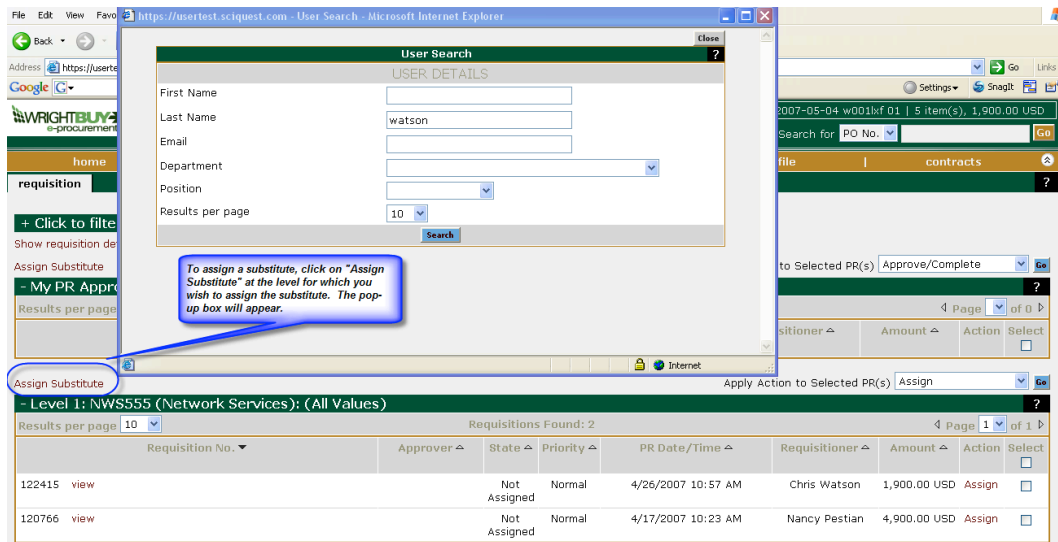
| Requisition No. | State  | Priority | PR Date/Time       | Requisitioner | Amount       | Action  |
|-----------------|--------|----------|--------------------|---------------|--------------|---------|
| 114747          | Active | Normal   | 3/15/2007 11:59 AM | Chris Watson  | 4,900.00 USD | Approve |

| Requisition No. | Approver     | State    | Priority | PR Date/Time       | Requisitioner | Amount       | Action |
|-----------------|--------------|----------|----------|--------------------|---------------|--------------|--------|
| 127173          | Amy Coble    | Assigned | Normal   | 5/22/2007 9:00 AM  | Nancy Pestian | 4,900.00 USD |        |
| 114747          | Chris Watson | Assigned | Normal   | 3/15/2007 11:59 AM | Chris Watson  | 4,900.00 USD |        |
| 114510          | Not Assigned | Normal   | Normal   | 3/14/2007 11:37 AM | Chris Watson  | 5,385.00 USD | Assign |
| 114508          | Not Assigned | Normal   | Normal   | 3/14/2007 11:27 AM | Chris Watson  | 3,531.75 USD | Assign |

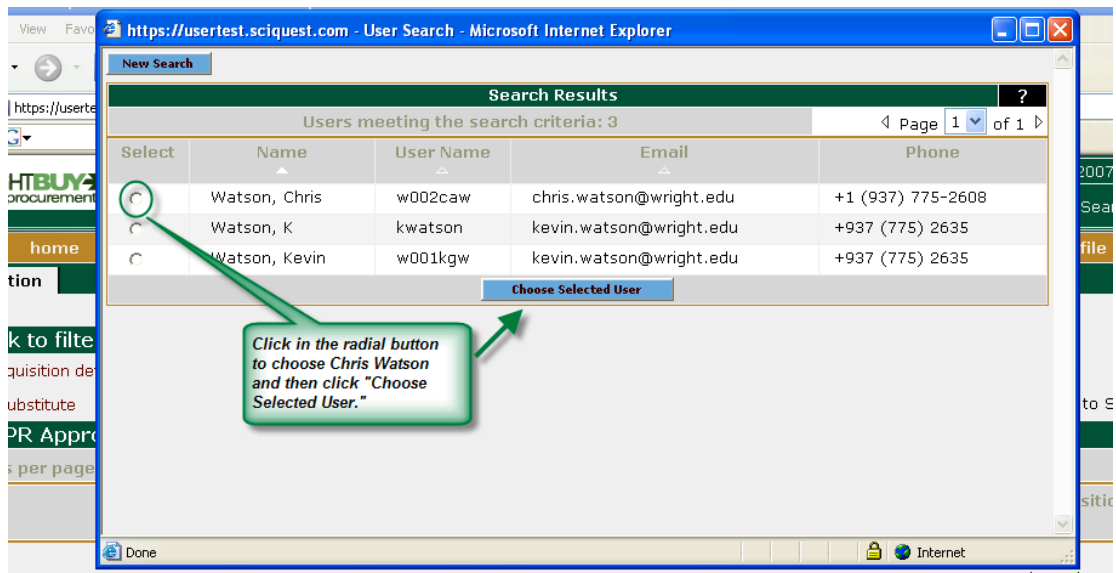
## ASSIGNING A SUBSTITUTE

If an approver is going to be away and may not be checking the system to approve PRs, the approver can assign a substitute. The substitute must have the same fund-org access as the approver. The substitute may act on behalf of that Level approver. However, the original approver still may take action if they are available to do so. This is good to use if the approver will be out of town and would like to have approvals done daily, but may not have access to a computer every day. **NOTE: You must assign a substitute for every level folder for which you are an approver.** To show all level folders that you are an approver, click on the **Click to filter requisitions**. Next, click on the filter dropdown arrow and select the **Manual Filter** option. Next, click in the check box for **Show Empty Folders**. This will show all of the level folders that you are an approver and need to assign a substitute to.



In our example, we are going to assign Chris Watson as a substitute. Type “Watson” in the Search Box for Last Name and click search.

Select the appropriate substitute and click **Choose Selected User**.



To end the substitution the original approver need only click on “End Substitution.” **Note: You must unassign the substitute for every level folder for which you are an approver.**

| Current Substitute: Chris Watson                   |          | End Substitution      |          | Apply Action to Selected PR(s) |               | Assign       | Go     |                          |  |
|--|----------|-----------------------|----------|--------------------------------|---------------|--------------|--------|--------------------------|--|
| - Level 1: NWS555 (Network Services): (All Values) |          |                       |          |                                |               |              |        |                          |  |
| Results per page 10                                |          | Requisitions Found: 2 |          |                                |               | Page 1 of 1  |        | ?                        |  |
| Requisition  | Approver | State                 | Priority | PR Date/Time                   | Requisitioner | Amount       | Action | Select                   |  |
| 122415 view  |          | Not Assigned          | Normal   | 4/26/2007 10:57 AM             | Chris Watson  | 1,900.00 USD | Assign | <input type="checkbox"/> |  |
| 120766 view  |          | Not Assigned          | Normal   | 4/17/2007 10:23 AM             | Nancy Pestian | 4,900.00 USD | Assign | <input type="checkbox"/> |  |

*Chris is now the substitute approver for this Level 1 Folder. To end her substitution, the Level 1 approver need only click on "End Substitution."*