Sm@rtBuy

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 & Documents – Document search and approvals  
D  Catalogues and Contracts  
E  Accounts Payable  
F  User’s Name – 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*
On the My Profile page the following options are displayed [Diagram 3]:

- User Information and Settings
- User Access and Security
- Permission Settings
- User Administration and History

**User Information and Settings**

**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]
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 **User Information and Settings** selection menu.

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

**Step 2.** Click the **Add** button to set up a combination of values to be used for checkout. [Diagram 6]
Step 3. A pop-up window then displays. [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]
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]

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]
Step 2. To add an address (typically the user’s default address) press the Select Addresses for Profile button.

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]

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.
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:** Default to CAD.
- **Time Zone:** Default set to EDT/EST – Eastern Standard Time.
- **Color Theme:** Defaults 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.

Email Preferences

The Email Preferences screen [Diagram 15] is used to determine when and why the user will receive email notifications from the system. By default preferences will be inherited from the role. Although notification can be enabled for each step in the process (submittal, review, approval, etc.), it is suggested that notifications be sent minimally when problems arise, such as rejection or when an e-mail is returned to the Requisitioner.

Step 1. From the User Information Settings menu; select the Email Preferences sub-link. **Note:** The notification options listed are dependent on a user’s permissions.

Step 2. From the menu determine when you would like to receive an Email. It is recommended to enable E-mail notifications for rejections. To enable a notification that is not already enabled at the role level, enable the Need to select “Email” option from the drop down menu box.

Step 3. Press the Save button to save changes at bottom of the screen. Emails will be sent immediately (as appropriate).
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 User Information and Settings link and select Cart Assignees. [Diagram 16] Any previously selected assignees are listed.

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

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

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]
**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 and select View User’s History from the User Administration and History menu. [Diagram 23]

![User Profile History](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.

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]
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 (Shop: Everything)
B Advanced Search
C Favourites
D Forms
E Click on the Supplier Logo

Simple Search [Shop: Everything]
From the homepage enter the product you are searching for into the search field. Then click the Go button. This will generate a list of items matching your keywords. [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
- Other Options – (e.g. exact phrases or word search)

Enter the criteria and click the Search button.

Add Items to Favorites and How to Access Favourites

Step 1. Search for an item and then click on the Add Favourite link on the right in blue [Diagram 29]
Step 2. Create a Destination Folder by clicking on the New icon 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]

Step 3. Click Submit. You will see a confirmation message, click Close.
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).

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]**

**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 **Compare** link under the **Add to Cart** button. **[Diagram 33]**

**Step 2.** Once you have selected at least 2 items for comparison, the **Compare Selected** button will become active. Clicking the Compare Selected will give you a side by side comparison of the product details for each item. **[Diagram 34 & 35]**
Step 3. To add items from comparison page simply:
  a. Click the Add to Cart button for a single item.
     OR
  b. Place a check in the desired items’ Select checkboxes and choose Add to Active Cart in the dropdown menu then click Go [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**.

Adding and Removing Items from a Cart

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

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

To add items to the cart click the **Continue Shopping** link and you will be returned to the Home/Shop page.

B 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.
**Step 3.** Click the **Update** button at the bottom of the page.

The **Total** at the bottom of the page and the **Cart** button in the upper right corner of the application both update with the revised quantities.

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 **View My Cart**.
**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**.

b. On the top right corner of this page click on the Continue Shopping blue hyperlink which will take you to the Shopping Home Page Screen.

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.

**C 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).

**Step 5.** Click **Go**.

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

**D 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.

**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]

**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 the **Search for an assignee** link. 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]
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 Order as shown below.

Step 3. Click the View Draft Shopping Carts link to view details of the cart that was assigned or click the Unassigned button to withdraw the cart assignment.

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

Deleting Shopping Carts

Step 1. Select the Shop navigation tab and then select My Carts and Orders on the menu,

Step 2. Click View Draft Shopping Carts.

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.

Please note: Consolidated carts with items in them appear with the Delete button inactive (grayed out). [Diagram 41]
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]

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 a list named Drafts Assigned to Me. Click on the Shopping Cart Name to open the cart. [Diagram 43]
Step 4. Review the order and then click **Proceed to Checkout**. You will need to verify that the information under the **Shipping** and **Accounting Codes** tabs is correct. These are highlighted in red at the top of the Requisition Summary Page. [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. Review the order and then click **Proceed to Checkout**.

Step 4. Choose the **Shipping** tab and click the **Edit** button next to the shipping address to update it. You can choose from one of the default addresses in your profile from the dropdown menu or choose the **Click Here** then the **Select a Shipping Address** links to search for a different address.

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

[Diagram 44]

[Diagram 45]
Step 6. Choose the Accounting Codes tab. Review fund and cost centre information at the header level. If you need to change the fund or cost centre information, click the Edit button on the right side of the page and choose the appropriate fund and cost centre combination from your Code Favourites or, by using the Select from All Values option to search for the appropriate fund and cost centre.

Step 7. Save when you have selected the appropriate fund and cost centre.

Step 8. Review the Account number for each item at the line level or if applicable at the header level on top of the Accounting Codes Page. If the account number is incorrect, correct it by clicking on the Edit button on the right of the page and either entering the appropriate account number or, using the Select from All Values option to search for an account code.

Step 9. Save when you have selected the appropriate account code.

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.

![Diagram 48]

Removing Line items

If you wish to remove a line item from the shopping cart, you can click on the **Remove** button on the left side of the screen beside the **Product Description**. [Diagram 49]

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 unit price of the line item) and select **Remove Select Items** from the dropdown menu at the upper right side of the page.

![Diagram 49]

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]

![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 **Return Cart** button next to the cart name at the upper left side of the screen. [Diagram 51]

   **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.

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** box on the **Home/Shop** page, click the **Carts Assigned to Me** option.

   **Step 2.** Click the **Delete** button on the right of the page beside the cart information.

   **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.
E. Returned Requisition from Approver

Step 1. Go to Action Items and select My Returned Requisitions.
Step 2. Select Comment tab to view reason for return.
Step 3. Make changes as required, and then resubmit the requisition by proceeding to checkout, going to the Final Review tab of the Requisition Summary page, and using the Submit Requisition button.
Step 4. If you cannot make a change, and instead decide to withdraw your cart, leave a comment under the Comments tab then go to Action Items and select My Returned Requisitions.
Step 5. Use the Withdraw option to the right of the Shopping Cart Name.

F. Submitting a Cart

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

G. Copying Previous Requisitions to a New Cart

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 box on the top right corner of the page. [Diagram 54]

**Step 4.** Select the **Go** button. 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, 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.
Step 3. Go to the History tab to view system history. By default, only those actions for the open document will display. Use the filter to view the history for all associated documents. Select Click to filter history. Select Filter, enter the applicable details such as start/end date etc. and then choose from the dropdown menu the type of document you want to Show history for.

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 - View Draft Shopping Carts.

Step 3. Click the Assign Substitute link, as shown below.

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.
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 View Draft Shopping Carts page to remove the substitution.

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. Click on the Orders & Documents icon and then Search Documents → My Purchase Orders link located below the document search bar. [Diagram 59]

Step 2. Click on the checkbox that corresponds to the purchase order you are receiving. The checkbox is located on the far right side next to the PO total on the page.

Step 3. Select Create Quantity Receipt from the dropdown menu at the upper right side of the screen and click Go. [Diagram 60]
Step 4. Confirm the quantity of items ordered matches’ number of items received. If so, click on Complete at the bottom right side of the screen to create the receipt. [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.
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 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 or Unassigned Requisitions Needing Approval. To review and approve new requisitions click on the Unassigned Requisitions Needing Approval link.

B. Moving Documents to My Unassigned Requisition/Approvals Folder

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

Step 2. Select the Expand All link just above the list of Cost Centre folders.
Step 3. To move a document to My PR Approvals folder, click the Assign button to the right of the Amount field for the requisition. [Diagram 64]

Step 4. The document 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.

Step 5. 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 documents 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 box and click **Go**.

![Diagram 66]

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**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 **Unassigned Requisitions Needing 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]
Standard Approval Process

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

**Step 1.** Open the document (requisition). Go to Action Item on the top right hand side of the page after assigning the Unapproved Requisition to your personal folder.

**Step 2.** Select the Requisition to approve.

**Step 3.** Click on the Requisition Number on the left side of the page.

**Step 4.** Review the information and make updates and comments as needed.

**Step 5.** Select the Approve/Complete Step option is from the Available Actions dropdown menu and click Go. [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 1-5.

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

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

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

[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 Unassigned Requisition Needing Approval.

**Step 2.** Select the checkbox on the far right side of the folder where the document resides next to the Action column.

**Step 3.** Select the Forward… option from the drop-down box and click the Go button. Skip to the next step #3. [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 1-5. Then follow steps 2-7 below.

**Step 2.** Select the Forward… option from the Available Options drop-down box and click the Go button. [Diagram 72]

**Step 3.** Enter specific user criteria to find the recipient of the forwarded requisition.

**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.
F. Assigning a Substitute Approver

Step 1. Use the Orders and Documents icon on the left side of the screen, then choose Approvals and access the Assign Substitute Approvers section. [Diagram 73]

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

[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 menu located next to the Go button at the upper right corner of the screen, select the option **Assign Substitute to Selected Folders**

**Step 3.** Click Go. [*Diagram 76*]

**Step 4.** Select the checkbox. **Include Date Range for Substitution**.

**Step 5.** 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 6.** Once you have a match click **Assign**. [*Diagram 77*]
The selected substitute will be indicated in the Substitute column. [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]
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 **Add Comment** button. *[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 **Add Comment** 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, and assign it to yourself (for review). The requisition must be open in order to perform this function.

**Step 1.** Follow Steps 1-5 under the **Standard Approval Process**.

**Step 2.** From the **Available Actions** drop-down box in the upper right-hand corner, select **Return to Requisitioner**.

**Step 3.** Click the **Go** button. **[Diagram 81]**

**Step 4.** 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.
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. Click on the PR Approvals tab. In addition to each of the possible steps being listed, the View Approvers link is available for the first step. **[Diagram 83]**

Step 3. Click the View Approvers link. An overlay displays providing a list of Approvers for the workflow step.

Step 4. To email an Approver, click on the appropriate email address.

Step 5. Click Close to exit the window.

![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

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416-736-2100 x.22240

OR

Email us at smartbuy@yorku.ca

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