

Approval Guide

If you are an Approver (a user that is part of an Approval Chain) in “catalogues.nsw.buy” eProcurement platform (herein referred to as “the platform”), you will be responsible for approving On Account Purchase Requisitions that are routed to you based on the configured approval process.

Notifications

Once buyers create requisitions requiring your approval, you will receive an email notifying you of the approval task.

Subject **Approval Required: Requisition XX**

The email will provide a summary of the requisition requiring approval and a link to click through to the platform to action the requisition. An example is provided below:



Approval Required

NSW Government Agency

Requisition RQ0011

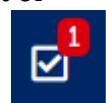
Description	Supplier	Qty	Distribution	Percentage	Unit Price	Subtotal
Towel Hand Scott Slim Roll Wht Carton 6	Bunzl Outsourcing Services	3	\$145.53	(100.00%)	\$48.51	\$145.53
Scott 12388 Slimroll Paper Hand Towel White 176 Case of 6 Rolls	Winc Australia	3	\$129.78	(100.00%)	\$43.26	\$129.78
					Subtotal	\$275.31
					Shipping	\$0.00
					Tax	\$27.53
					TOTAL	\$302.84

[Please login to approve or decline this requisition.](#)



The link in the notification email will take you directly to the approval tasks view.


Once logged into the platform, you will know that you have approvals waiting for your review when a red number alert appears next to Tasks in the menu bar (top right of screen).



Click on the task list and under **Approvals** will be the requisition(s) pending your approval.

Click on the individual **requisition** to be taken to that requisition pending approval.

Click **Approvals** to be taken to the Approvals Page.

Approvals 1		
	1	Complete Off
	14/05/2020 1:35 PM	

Approval Page

Requisition Approval Overview

The approval page will display all outstanding approvals in your tasks with the requisition number, buyer's name, supplier, order type, and total.

You can also change the Approval State search filter to view any approvals that you have already acted on, approved or declined (to view previous history).

Approvals

You are currently available and will receive approval requests.

Change Availability »



Requisition Number

Buyer

Period
Last 90 Days

Search

Requisition	Buyer	Supplier	Type	Created Date	Total	
<div><div></div><div>1</div></div>	Angela Boland	Complete Office Supplies (COS)	Standard	14/05/2020 1:33 PM	\$76.69	<div><div>✓ Approve / Decline</div></div>

On the left, the speech bubble and paperclip icons   indicate Comments and Attachments have been submitted with the requisition (where applicable).

You may be informed enough to utilise the Approve/Decline option from this page.

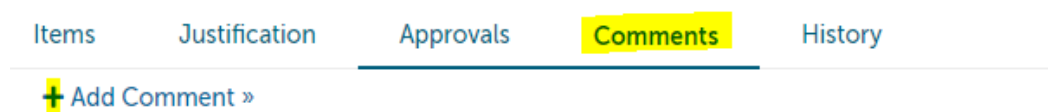
Or, select a requisition to review its full details and follow the below.

Review Requisition and Add Comments

Select the requisition you wish to view.

Buyers and Approvers can post comments on requisitions and also receive an alert email when a comment is posted. This is useful in situations when Approvers have questions around the need for an item or requires more specific information relating to a product or service.

If you have a query regarding the requisition, you can add a Comment by navigating to the Comments tab and selecting **Add Comment**.

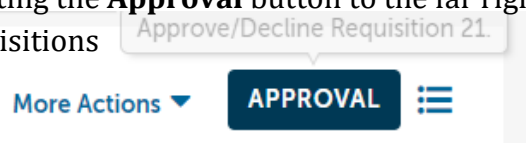


A pop-up window will appear for you to make your comments which will alert the Buyer.

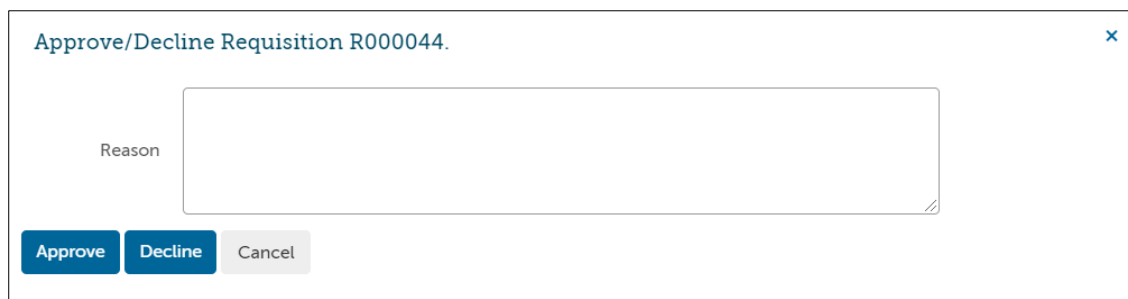
Comments are a great way of maintaining history of the questions and responses in relation to a purchase, rather than separately via email.

Approve/Decline Window

Once you have reviewed the details of the requisition, you can proceed to Approve or Decline the requisition, by selecting the **Approval** button to the far right, next to the More Actions button of the requisitions

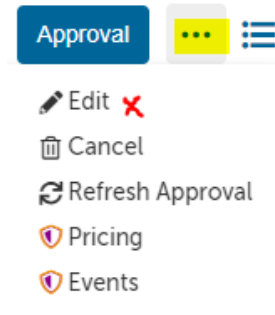


This will open a window where you can **Approve or Decline** the requisition and enter a comment for either action that is recorded in the approval history.



Editing a Requisition

An Approver may edit (some fields of) a requisition prior to approval. To edit, click the “More Actions” icon at the top right of the requisition and select Edit.



The following fields can be edited, if required:

- Ship To and Bill To addresses for the requisition
- Add or delete Attachments
 - Justification Attachments stay internal and will not be sent to the supplier
 - Order Attachment will be sent to the supplier by default but can be selected to not be sent
- Edit Notes
 - Justification notes are for internal use and will not be visible to the supplier
 - Delivery Notes are sent to the supplier on the purchase order

Once you have completed your edits or additions to the requisition, you need to click the Save button at the bottom of the screen to finalise the updates.

Then proceed to the Approval button to approve or decline the requisition.

Approval History within a Requisition

Click the Approvals tab on the Requisition to view the approval history. The approval history shows all past approval actions and upcoming approvals needed before the requisition becomes a PO. The approval history is shown to anyone who can view the requisition.

The approval history shows the following information:

- Approval Chains name and routing basis


- Approver or approval group
- The task Created Date - date/time that the approval task was originated for the approver(s)
- Task Completed Date – date/time that the approval task was completed by the approver
- Level – authorisation level for the approver(s)
- Reason – any comment entered by the approver when task was completed
- Action taken will display at the far right displaying if the action was Approved, Skipped, Escalated or Declined.

Unavailability Setting

To set yourself as unavailable and/or assign a proxy approver (if enabled), click the Change Availability link to have the Change Availability window appear. In the Change Availability window, check the box to indicate that you are unavailable, select the date/times that you will be unavailable from and to.

If enabled, you can also assign a proxy approver to take the approval actions while you are unavailable. You will still receive the approval notifications and can act even if you are marked as unavailable. The proxy user will also receive the notification and be able to take the same action as delegated by you assigning them as your proxy.


Approvals

 You are currently available and will receive approval requests.

 [Change Availability »](#)

Once you set your unavailability, you will see a confirmation message until you become available again.

Approvals

 You are currently available and will receive approval requests but you will be unavailable between 1/27/2020 2:05 PM and 1/31/2020 11:59 PM.
Approvals will be sent to your proxy

 [Change Availability »](#)