

Fixed Assets Approval Workflow

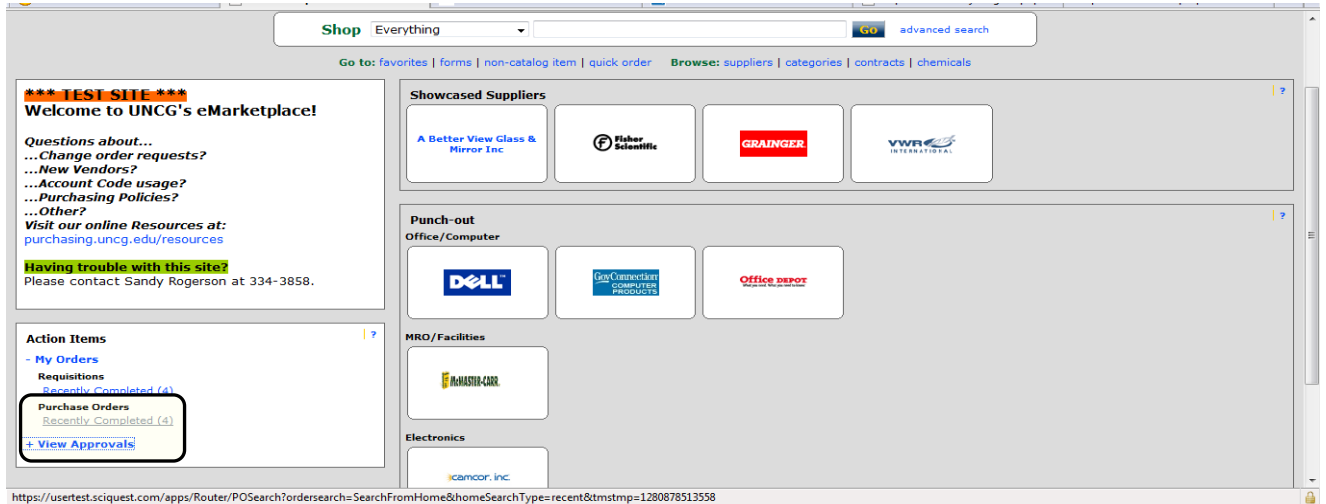
Fixed Asset Approval account codes (eff. 8/2010)

Account (Account) one of the following values: {"203410", "203421", "203425", "203430", "203440", "203450", "203460", "203470", "203480", "203490", "203510", "203520", "203530", "203540", "203550", "203551", "203610", "203620", "21001A", "21001B", "21001C", "21001D"}

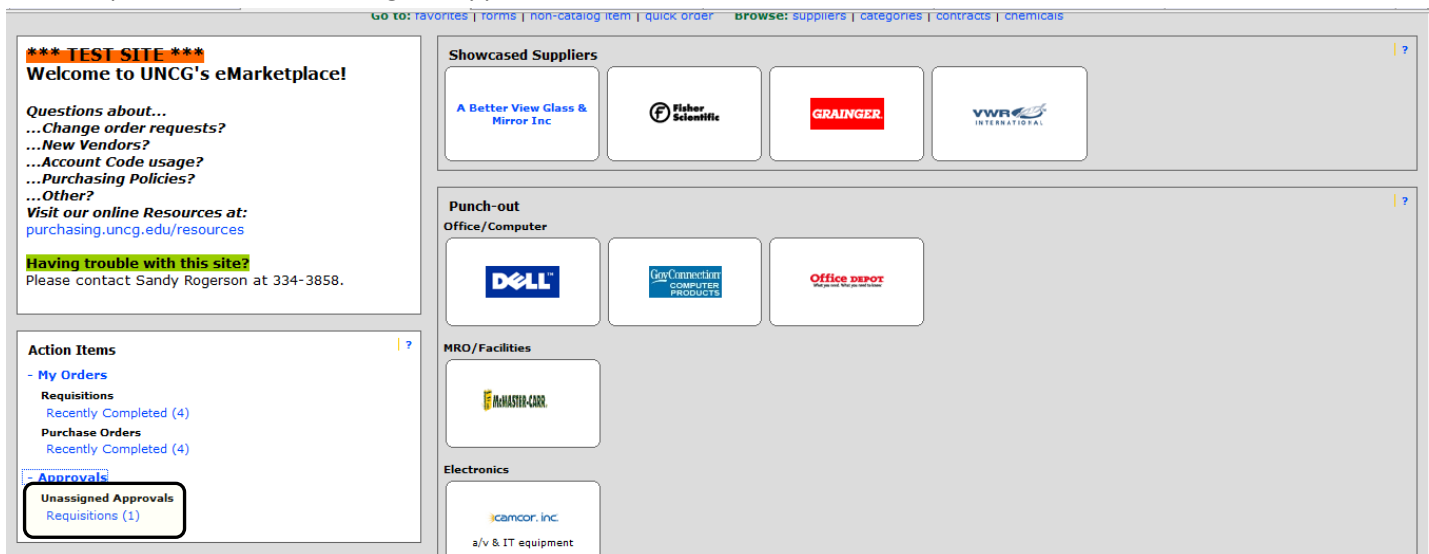
Fixed Assets II Approval (eff. 8/2010)

Document Total amount : greater than or equal to 5000.00 USD –and- any of the “suspicious” codes below: {"201110", "201120", "201130", "201140", "201150", "201151", "201152", "201153", "201210", "201220", "201230", "201240", "201250", "201350", "201351", "201610", "201710", "201810", "201820", "201840", "202010", "203250", "203270", "203280", "203290", "203310", "203320", "203330", "203340", "221050", "221060", "221070", "221080", "221090", "221100", "221110", "233110", "233210", "233310", "233410", "233510", "233520", "233530", "233610", "233710", "233810", "233910", "234010", "234110", "236010", "236020", "236110", "236210", "236310", "236410", "236510", "236610", "236710", "236810", "236910", "237010", "237110", "237210"}

1. Login to eMarketplace
2. Expand 'View Approvals' under Action Items



3. Click 'Requisitions' under Unassigned Approvals



4. Click 'Assign' to assign the requisition to yourself

The screenshot shows a requisition list under the heading '- Fixed Asset'. The table has columns for Requisition No., State, Priority, PR Date/Time, Requisitioner, Amount, and Action. The first row shows requisition 425246, which is 'Not Assigned', 'Normal' priority, dated '8/3/2010 7:34 PM', by 'Judy Lillis', for an amount of '6,000.00 USD'. The 'Action' column for this row has an 'Assign' button highlighted with a red box.

5. Click either the requisition number or view to access requisition information

The screenshot shows the same requisition list. The 'view' link next to requisition number 425246 is highlighted with a red box. The 'Action' column now shows 'Approve' instead of 'Assign'.

- **If the requisition information is all correct**, select Approve/Complete step from Available Actions dropdown and click Go

The screenshot shows the detailed view of requisition 425246. The 'Available Actions' dropdown menu is open, showing options: 'Approve/Complete Step', 'Approve/Complete Step', 'Return to Shared Field', 'Return to Requisitioner', 'Forward to ...', 'Add Comment', 'Add Notes to History', and 'Copy to New Cart'. The 'Approve/Complete Step' option is highlighted with a red box. The main content area shows details for General, Shipping, Billing, and Accounting Codes.

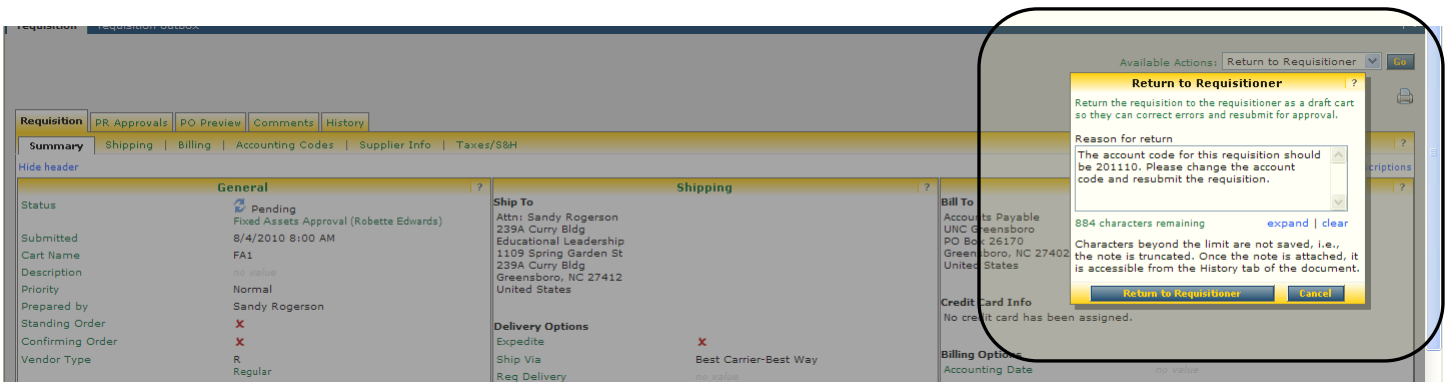
- **To forward to allow another Fixed Asset approver to review**, select Returned to Shared Folder from the Available Actions dropdown and click Go.

The screenshot shows a requisition system interface. At the top right, an 'Available Actions' dropdown menu is open, with 'Return to Shared Folder' selected. The main interface displays a requisition summary with tabs for 'Summary', 'PR Approvals', 'PO Preview', 'Comments', and 'History'. The 'Summary' tab is active, showing details for a requisition with status 'Pending' and submitted on 8/4/2010 8:00 AM. The requisition is for 'Fixed Assets Approval (Robette Edwards)'. The 'Shipping' section shows 'Ship To' information for Sandy Rogerson at UNC Greensboro. The 'Billing' section shows 'Bill To' information for Accounts Payable at UNC Greensboro. The 'Accounting Codes' section shows an index of 110005 for Academic Administration and an account of 203410 for Office Furniture Capital \$5,000 +. The 'Internal Notes and Attachments' section shows a note to all suppliers. The 'External Notes and Attachments' section is empty.

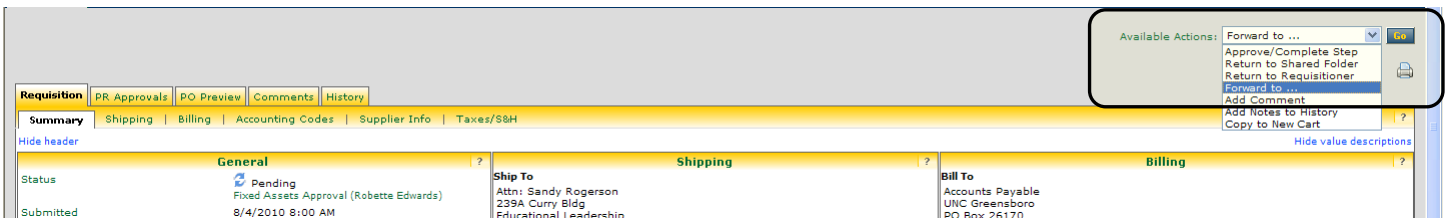
- **To return to the requisitioner** for changes, select Return to Requisitioner from the Available Actions dropdown and click Go.

The screenshot shows the same requisition system interface as above, but with the 'Available Actions' dropdown menu open and 'Return to Requisitioner' selected. The main interface details are identical to the previous screenshot, showing the requisition summary, shipping and billing information, accounting codes, and notes.

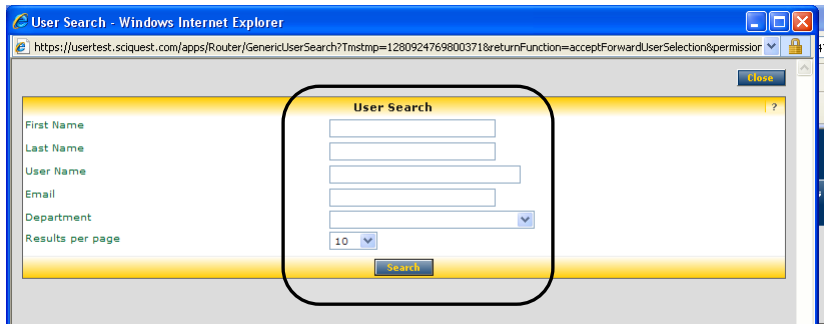
- You can then add any notes as to why this requisition is being returned. The requisitioner will receive any notes you enter here in an email.



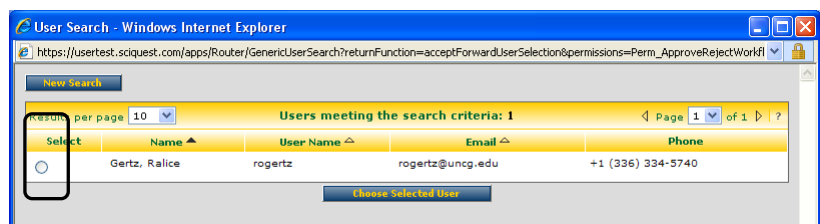
- **To forward the requisition to your supervisor or some other person for review**, select Forward to... from the Available Actions dropdown and click Go.



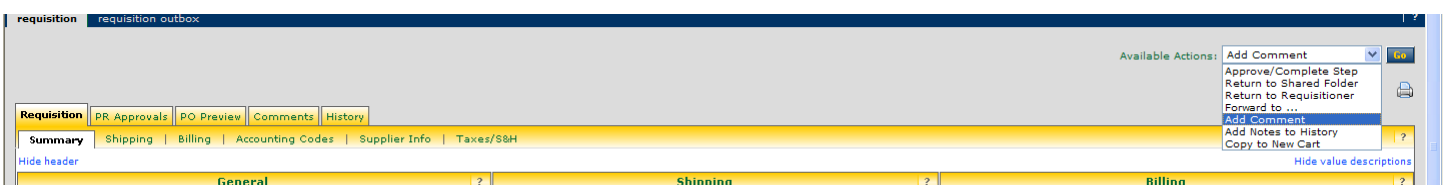
- Type the last name of the person to whom you want to forward the requisition to in the Last Name field and click Search.



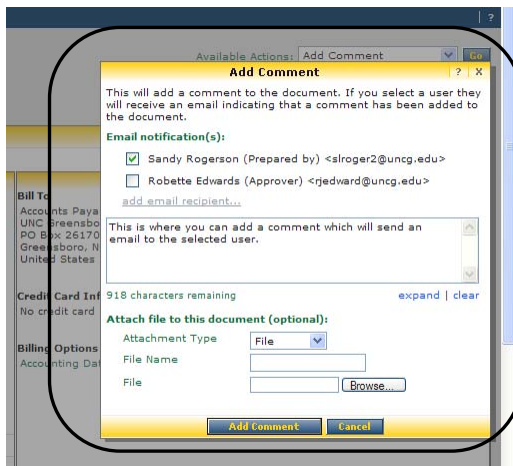
- Select the person to whom you want to forward the requisition to and click Choose Selected User. You are given the option of sending a note to the person you are forwarding the requisition to.



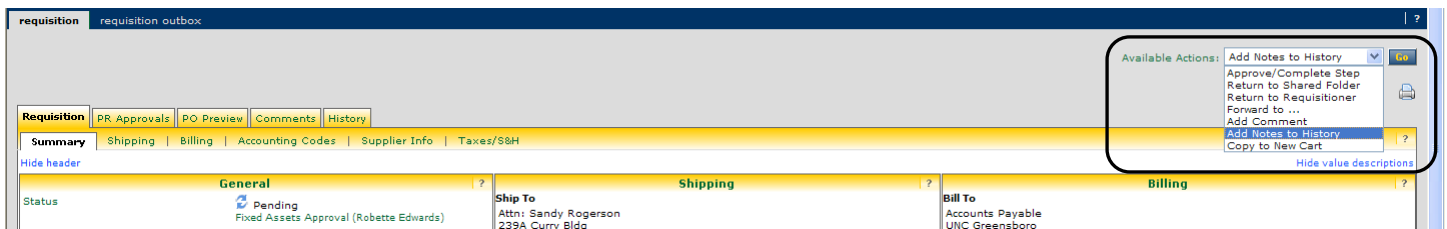
- **To add a comment to email to someone**, select Add Comment from the Available Actions dropdown and click Go.



- This is where you can add a comment which will be sent in an email to the selected user.



- **To add a comment to the auditor for justification or auditing purposes without sending an email,** Click Add Notes to History, then Go.



- Add the notes and then click Attach.

