

16 Approval Instructor Guide

General Training Management Guide for training setup

Handouts

- ✓ Introduction
 - Name Tents
 - BidBuy General Overview
- ✓ Approval Training
 - 16 Approval Presentation
- ✓ Post Training Distribution
 - 16 PROCESS Approval Only
 - 16 Quick Reference Approval Only

Pre-Training Setup

Document Type	Action
Review	Review Presentation: 16 Approval Presentation
Practice	Practice Approving Documents in BidBuy
Setup for Approval Training combined with another Procurement Type Training	When combining Approval Training with another procurement training the attendees will be creating BidBuy documents; it is recommended to have the attendees manually add their Training User as the approver to a document towards the end of the session for the other procurement type. This will enable the instructor to present the Approval Presentation and the attendees can approve the document they submitted to their Training User as the exercise document.
Setup for Approval Only Training	When conducting Approval Only Training; prior to the session, it is recommended the instructor create a Requisition and manually add a Training User account that will be distributed to attendees to enable the document to be available in the user's queue for the exercise. The Requisition can be cloned and submitted as many times as required to ensure all attendees of the class will have a document awaiting their approval.
Print Document	Print Presentation: 16 Approval Presentation

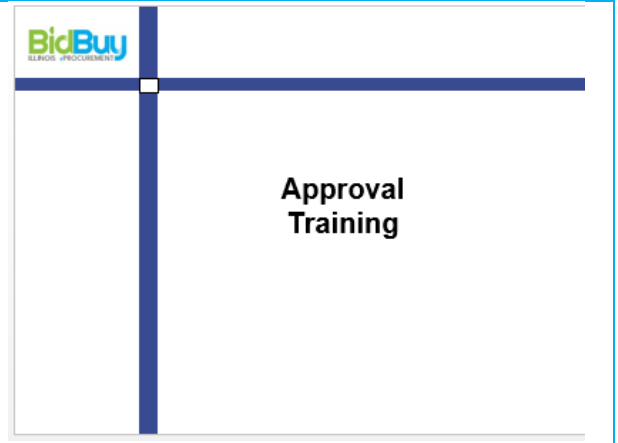
Timeline

Session I	5 min.	Introduction
	15 min.	Approval Presentation
	5 min.	Approval Only Demo
	10 min.	Approval Only Hands-On
	5 min.	Review and Closing

Presentation - Approvals

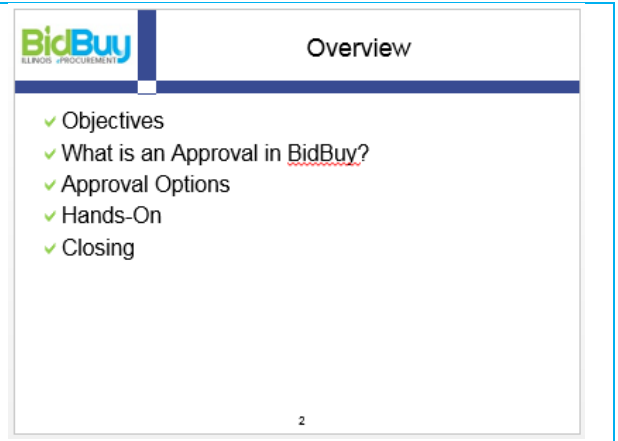
Approval Training

Approvals in BidBuy enable State users to review and approve a document.



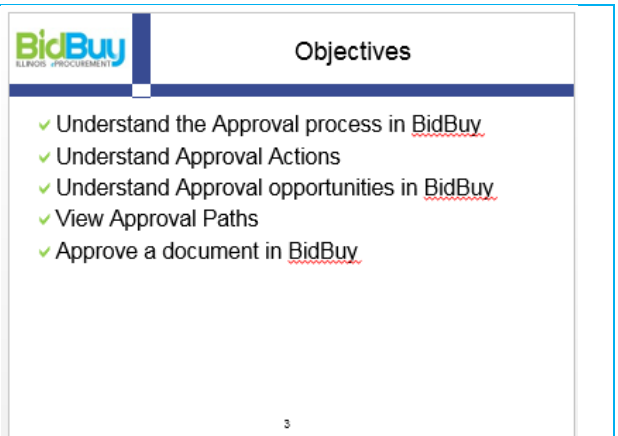
Overview

The Overview provides a brief highlight of what is to be covered in the Presentation and the BidBuy Demo.



Objectives

After attending the Approval Only training, the attendees will have an understanding of the Approval process in BidBuy; as well as understand the actions an approver can take and what documents have an opportunity to be approved.

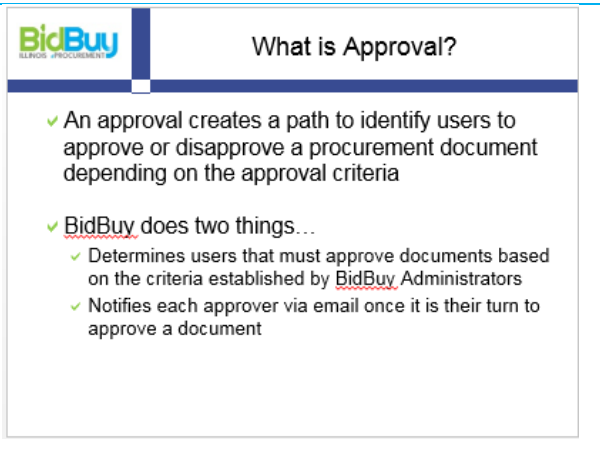


What is an Approval?

When a user submits a BidBuy document for approval, if an approval path has been configured by an Administrator for the document criteria the path will display and the user is able to only select **Continue** or **Cancel & Exit**.

If the user selects Cancel & Exit, they will be taken back to the In-Progress document to modify and resubmit for approval. Selecting Continue will trigger the first approver to be notified the document is available for them to review and approve.

The document will be forwarded to the approver(s) in the order they have been assigned. Once all approvals have been approved, the document status will change.



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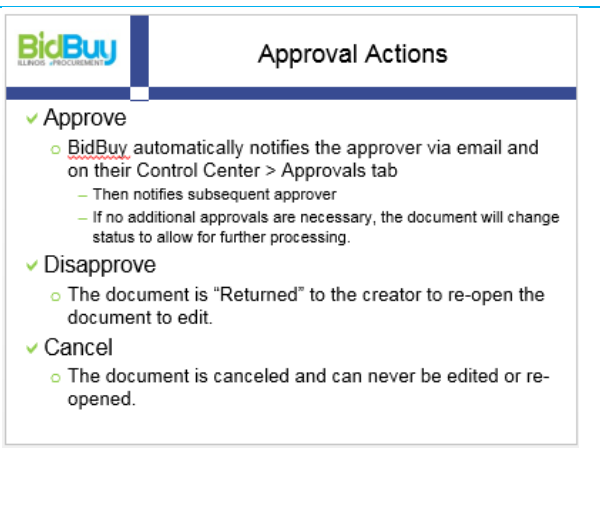
What is Approval?

- ✓ An approval creates a path to identify users to approve or disapprove a procurement document depending on the approval criteria
- ✓ BidBuy does two things...
 - ✓ Determines users that must approve documents based on the criteria established by BidBuy Administrators
 - ✓ Notifies each approver via email once it is their turn to approve a document

Approval Actions

Approval Actions – Options:

- ✓ **Approve** – When selected and saved, the document will be approved and BidBuy will notify subsequent approver(s). If no additional approvals are required, the document will change status.
- ✓ **Disapprove** - When selected and saved, the document status will be set to Returned and returned to the creator of the document for further processing.
- ✓ **Cancel Invoice** – NOT USED BY THE STATE - When selected and saved, the document status will be set to Canceled.
 - ✓ The State process is for approvers to never cancel a document during their approval. If an approver would like a document to be canceled, please add a note and Disapprove. This will enable the creator to review and take the appropriate action.



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Approval Actions

- ✓ Approve
 - BidBuy automatically notifies the approver via email and on their Control Center > Approvals tab
 - Then notifies subsequent approver
 - If no additional approvals are necessary, the document will change status to allow for further processing.
- ✓ Disapprove
 - The document is "Returned" to the creator to re-open the document to edit.
- ✓ Cancel
 - The document is canceled and can never be edited or re-opened.

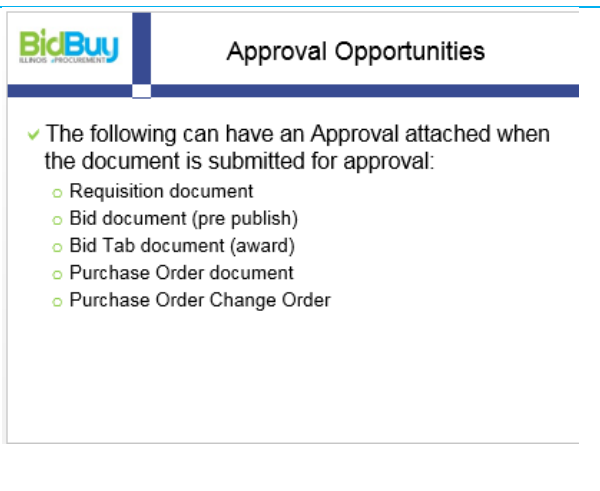
Approval Opportunities

The following documents have an “approval opportunity” upon submitting.

- ✓ Requisition
- ✓ Bid (pre publish)
- ✓ Bid Tab (award)
- ✓ Purchase Order
- ✓ Purchase Order Change Order

If there are not any approval paths pre-configured by a BidBuy Administrator based on the document’s criteria, the user has an opportunity to manually add an Approver.

- ✓ Only users with rights to approve for the Agency are listed when manually adding approvers.



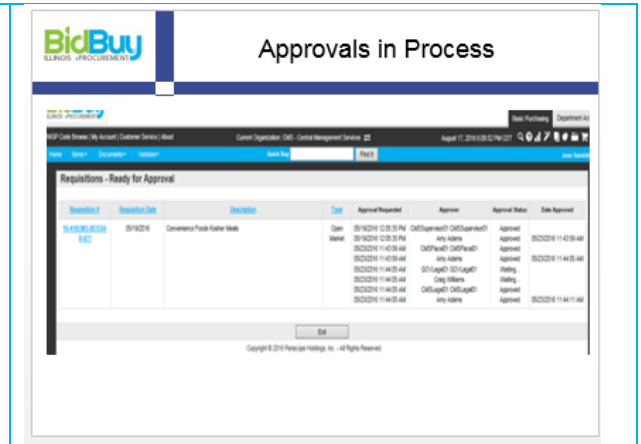
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Approval Opportunities

- ✓ The following can have an Approval attached when the document is submitted for approval:
 - Requisition document
 - Bid document (pre publish)
 - Bid Tab document (award)
 - Purchase Order document
 - Purchase Order Change Order

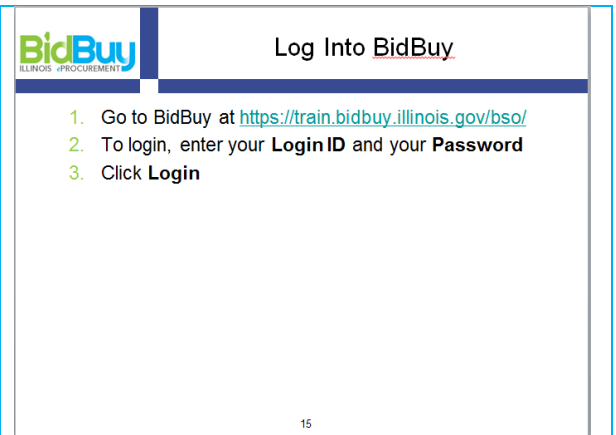
Approvals in Process

Users can view the status of approvals requested and completed.



Log into BidBuy

The login process is the first step when entering BidBuy



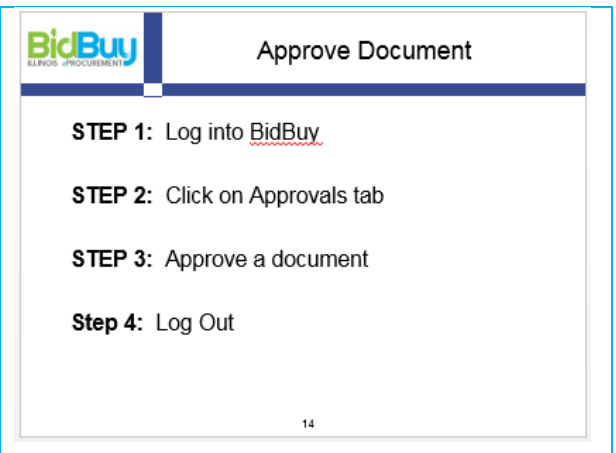
Instructor Online - Approve a Document

Instructor does the following and then turns over to users to do.

Approve Document

The following details steps to Approve a BidBuy document

- ✓ Log into BidBuy
- ✓ In Control Center, select the Approval Tab
- ✓ Navigate to Documents Pending My Approval
- ✓ Select Document #
- ✓ Review document
- ✓ On Summary Tab, scroll down to the Approval Actions
- ✓ Select approval option, Approve or Disapprove
- ✓ Add comment (optional but suggested if disapprove)
- ✓ Click Save & Exit
- ✓ System warns you that you are approve and click OK



Presentation - Review & Closing

Closing

Closing – Opportunity for any final comments and ask for questions

