EMAIL APPROVALS

Summary of Feature:

Approvers now have the ability to take action on documents quickly whether they are in the office or on the go. Approvers will continue to have the ability to take action in the application; however, this feature allows approvers to also take action from their desktop email or on many mobile devices without having to access the application, potentially decreasing the length of the procure-to-order process.

Approvers will receive an enhanced approval email containing pertinent order information and a quick action webpage link where action may be taken. The email contains order information to allow the approver to make a decision on what action to take on the entire document. The webpage allows the approver to select their action and enter comments.

By default, a personal approval code is required in order for the approver to take action from the webpage link, therefore ensuring the authorized approver is the person taking action on the requisition or purchase order. Approvers maintain an email approval code in their profile. When the approver accesses the approval webpage, they enter the email approval code and are authenticated as the authorized approver.

Taking Action (How it works)

1. **Click the link**… After reviewing the order details in the email, the approver selects the link to access the secure approval webpage.

2. **About the webpage**…The webpage that launches renders in the approver's site colors, and displays limited document information to confirm the approver has landed on the appropriate approval page.

3. **Available actions**… The approver will have the same actions that are available to them in the site, for taking action on **entire** documents. Possible actions include approve, reject, assign to myself, and return to requisitioner.

4. **Entering approval code and taking action**… The approver selects the desired action and enters a comment if they choose. Approvers must enter their email approval code to submit the action for organizations where it is required.

5. **Confirmation**… Once the action is complete, the approver receives a confirmation webpage. The action is logged in history as having been taken via email. Comments are also logged to Comments and history.

6. **Order already approved?** If action has already been taken by another approver in a shared folder, the approver will receive a message that action has already been taken on the document.

Approver Email Notifications. In order for the user to receive the emails, the user must have the PR pending Workflow approval email notification enabled. NOTE: This is the same notification as used with the current email, therefore many users will already have this enabled.

Approval Code Configuration and Setup

- **Approval Codes:** Approval codes provide security and help to ensure that the appropriate users are reviewing requisitions and orders. ***Each approver must create his/her approval code before action can be taken from an approval email***.

- **User Setup REQUIRED**: Users will not be able to approve from email until the approver has configured an approval code in their profile. In this case, the approver will receive the enhanced email with order information; however, the email will not contain a link to the approval webpage. Instead, a warning message will display directing them to their site to take action on the document as well as to configure their email approval code to take action from future emails. This is set up on their profile under Profile>User Identification in Email Approval Code. The user's code must be at least 4 characters and may be any combination of letters, numbers and characters.

- **What happens if Approval Code not set up?** Users will not be able to approve from email where the organization has required email approval codes, but the approver has not yet configured an approval code in their profile. In this case, the approver will receive the enhanced email with order information; however, the email will not contain a link to the approval webpage. Instead, a warning message will display directing them to their site to take action on the document as well as to configure their email approval code to take action from future emails.

Email Format: HTML or Plain Text

Approval emails can be delivered to approvers via HTML format or Plain Text. This setting is defaulted to HTML format, but can be overridden at the user level. A user might choose to default to plain text if it is their required email format or if they will be approving via a mobile device where email is best rendered without formatting.

Overriding format by users: Users may manage their preferred email format by overwriting the organization's default under profile>Personal Settings. The Preferred email format preference defaults to blank to inherit the organization's setting. To explicitly choose a format, select either HTML or Plain Text from the dropdown.

Additional Details about Email Approvals

All users with the approver, purchasing buyer, purchasing manager, or warehouse manager roles will be given permission to approve/reject requisitions via email and will receive the enhanced email.

Please note that the approval email will state if an attachment is included in the requisition. Approvers will not be able to see any attachments unless they log into the application. If you need to see attachments before approving the requisition, you must log in to MarketPlace to do so.

How to Set Up Your Email Approval Code

1. Log into MarketPlace and click on the Profile link in the upper left-hand corner (right next to your name).
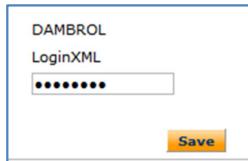
2. If you are not already on this tab, click on User Settings, then User Identification.

3. Enter a *minimum* of a four-character PIN number. The PIN number can be letters, characters, or numbers. You can have more than four (4) characters but not less.

4. Click Save.

How to Approve Via Emails Using Your Approval Code

1. Make sure you have email notifications on for PR (purchase requisitions) coming into your approval queue. Go to Profile -> Email Preferences, and then make sure that "PR pending Workflow approval" is checked (on).

2. Once you receive the next approval email, you should see a listing of the requisition, including the user, the vendor, the item(s) being purchased, the index and account(s) being charged, and the total cost. Below that, you should see a box that reads "Ready to approve, reject or assign this document to yourself? Take Action". Click on the part that says "Take Action".

3. Once you click "Take Action", a web page should open up on your computer, iPad, or smart phone. You must do two things:

a. Select an action. Your choices are:
    i. Approve
    ii. Assign to myself
    iii. Reject
    iv. Return to Requisitioner

    Please note that you cannot edit or change anything when you are approving through an email, nor can you approve one or more lines, and reject others. You can only act on the entire document as it is.

b. Optionally, before you click Submit you can enter a comment. If you are going to reject or return the requisition you should enter a comment, as it is very helpful to the users.

c. Enter your approval code. After you have selected an action and entered your approval code, click Submit.