# TRAINING GUIDE

*PAW PROCUREMENT SYSTEM (PPS)*

*DEPARTMENT APPROVALS*

# PAW PROCUREMENT SYSTEM (PPS)

**PLEASE NOTE DEPARTMENTAL APPROVERS <u>SHOULD NOT</u> APPROVE ANY TRANSACTIONS SUBMITTED BY AAOU SSC STAFF IN THE PAW SYSTEM, CURRENT AAOU SSC STAFF ARE AS FOLLOWS:**

*CHRISTINA ROLLE*

*DAWN JACKSON*

*DOMONIQUE PITTS*

*JOHN C. ROEMER*

*MICHAEL RENDA*

**TRANSACTIONS SUBMITTED BY AAOU SSC STAFF IN THE PAW SYSTEM WILL BE APPROVED BY AAOU SSC DESIGNATED APPROVERS. CURRENT AAOU SSC DESIGNATED APPROVERS ARE AS FOLLOWS:**
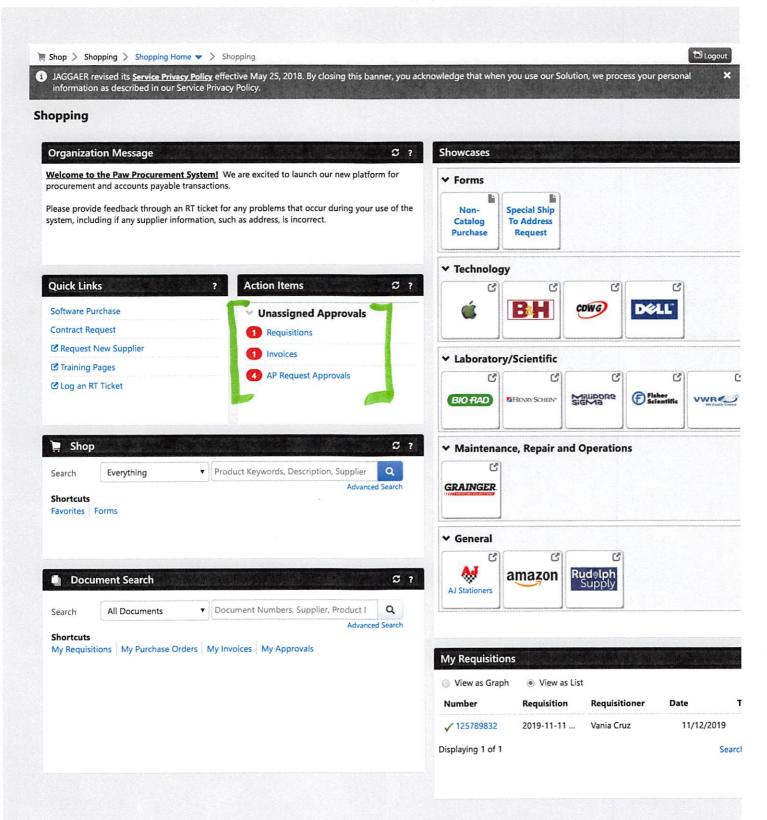
*MARTINA BUCKLEY*

*VANIA CRUZ*

# PAW PROCUREMENT SYSTEM MAIN PAGE

🛒 Shop > Shopping > Shopping Home ▾ > Shopping      🗗 Logout

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## Shopping

### Organization Message    ⟳ ?

**Welcome to the Paw Procurement System!** We are excited to launch our new platform for procurement and accounts payable transactions.

Please provide feedback through an RT ticket for any problems that occur during your use of the system, including if any supplier information, such as address, is incorrect.

### Quick Links    ?

Software Purchase

Contract Request

🗗 Request New Supplier

🗗 Training Pages

🗗 Log an RT Ticket

### Action Items    ⟳ ?

▾ **Unassigned Approvals**

① Requisitions

① Invoices

④ AP Request Approvals

### 🛒 Shop    ⟳ ?

Search | Everything ▾ | Product Keywords, Description, Supplier | 🔍

Advanced Search

**Shortcuts**

Favorites | Forms

### 📄 Document Search    ⟳ ?

Search | All Documents ▾ | Document Numbers, Supplier, Product I | 🔍

Advanced Search

**Shortcuts**

My Requisitions | My Purchase Orders | My Invoices | My Approvals

### Showcases

**∨ Forms**

| Non-Catalog Purchase | Special Ship To Address Request |

**∨ Technology**

🍎    B&H    CDWG    DELL

**∨ Laboratory/Scientific**

BIO-RAD    HENRY SCHEIN    MILLIPORE SIGMA    Fisher Scientific    VWR

**∨ Maintenance, Repair and Operations**

GRAINGER

**∨ General**

AJ Stationers    amazon    Rudolph Supply

### My Requisitions

○ View as Graph    ◉ View as List

| Number | Requisition | Requisitioner | Date | T |
|--------|-------------|---------------|------|---|
| ✓ 125789832 | 2019-11-11 ... | Vania Cruz | 11/12/2019 | |

Displaying 1 of 1           Search

# PAW PROCUREMENT SYSTEM REQUISITION APPROVALS

# Approving Requisitions

After the Requestor submits a shopping cart as a requisition, Paw Procurement will route the requisition to the department's financial Approver. The system an email notification to the approver when a requisition is pending approval.

To approve requisitions by email, open the email and select the **Take Action** button (See Setting Up Email Approval Code to enable this button). This will open a detailed summary of the requisition and allow you to immediately approve/reject, assign to yourself (in order to make edits/comments), or send it back to the requestor after entering your approval code. It should be noted that all edits and comments for the requisition are only able to be made after logging in to PPS, and are not able to be made directly from the email. If the requisition no longer has an **Approve** option available, it has already been approved by someone else with financial approval authorization for the department. The additional approvers appear under the **Other Approvers** section.

To approve requisitions from the Paw Procurement System, click the **Action Items** flag at the top right of your screen (or go to the corresponding section of your dashboard). You can also use the menu on the left and go to **Orders -> Approvals -> Requisitions to Approve**. The requisitions will be organized into folders that you can filter and also organize as a list. Assign a requisition to yourself in order to edit, approve/reject, or return it (requisitions you can't assign or approve have already been taken by someone else).

**Questions and feedback:**

Log an RT Ticket

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Orders > Approvals > **Requisitions to Approve** ▼ > My Approvals - Requisitions      🔄 Logout

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**Group Results By:** Folders ▼

Assign ▼   Go

**Filtered by**

| | |
|---|---|
| Type: | Requisitions |
| Date Range: | All Dates |
| View Approvals For: | Vania Cruz |

[remove all]

**State**
☑ Not Assigned

Total Results Found: 1      All Dates

◀

Sort by: Submit date newest first ▼    ?

Hide requisition details 📂 expand all   📁 collapse all     Results per folder: 20 ▼

▷ 📁 **Department Approval 10363 [1 result]**

**Filter My Approvals**   ?

**Type**

Requisitions ▼

**Date Range**

All Dates ▼

**Supplier**

AMAZON CAPITAL SRVCS INC (1)

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Orders  >  Approvals  >  Requisitions to Approve ▼  >  My Approvals - Requisitions                    🔄 Logout

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**Group Results By:** [ Folders ▼ ]

[ Assign                                     ▼ ]

Total Results Found: 1                    All Dates                                                [ Go ]

◀          Sort by:  [ Submit date newest first              ▼ ]                                      ?

Hide requisition details 📁 expand all   📁 collapse all                          Results per folder: [ 20 ▼ ]

◢ 📁 **Department Approval 10363 [1 result]**

| Requisition No. | Suppliers: | Assigned Approver | PR Date/Time | Requisitioner | Amount | Action | ☐ |
|---|---|---|---|---|---|---|---|
| 🔄 **126410079** 📄 | AMAZON CAPITAL SRVCS INC | Not Assigned | 12/2/2019 9:38 AM | Georgine Bozi | 109.46 USD | Assign | ☐ |

| Requisition Name | 2019-11-25 XV56614 01 | | 📁 Folders | 1 Days in folder | [Department Approval 10363] |
|---|---|---|---|---|---|
| No. of line items | 3 | | | | |

**Filtered by**

Type:                    Requisitions
Date Range:              All Dates
View Approvals For:  Vania Cruz

[remove all]

**State**
☑ Not Assigned

**Filter My Approvals**                    ?

**Type**

[ Requisitions                    ▼ ]

**Date Range**

[ All Dates                       ▼ ]

**Supplier**

AMAZON CAPITAL SRVCS INC (1)

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Orders > Approvals > Requisitions to Approve ▼ > My Approvals - Requisitions

🔄 Logout

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**Group Results By:** Folders ▼

### Filtered by

| | |
|---|---|
| Type: | Requisitions |
| Date Range: | All Dates |
| View Approvals For: | Vania Cruz |

[remove all]

**State**
☑ Not Assigned

### Filter My Approvals          ?

**Type**

Requisitions          ▼

**Date Range**

All Dates          ▼

⚠ **No Documents found**

Requisitions : All Dates AND Not Assigned

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Vania Cruz ▼  ★  🚩6  🔔31  🛒 0.00 USD   Search (Alt+Q)  🔍

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**Group Results By:** Folders ▼

**Filtered by**

Type:               Requisitions
Date Range:         All Dates
View Approvals For: Vania Cruz
                    [remove all]

**State**
☑ Not Assigned

**Filter My Approvals**        ?

**Type**

Requisitions                   ▼

**Date Range**

All Dates                      ▼

⚠️ **No Documents found**

Requisitions : All Dates AND Not Assigned

**Action Items**

**My Assigned Approvals**
Requisitions To Approve                    [1]

**Unassigned Approvals**
Invoices                                   [1]
AP Request Approvals                       [4]

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**Group Results By:** Folders ▾

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Total Results Found: 1 | | | **All Dates** | | | Assign ▾ | Go |

3.

Sort by: Submit date newest first ▾

2.  ~~Assign~~
    **Approve/Complete**
    ~~Return to Shared Folder~~
    Add Notes to History

**Filtered by**

Type:  Requisitions
Date Range:  All Dates
View Approvals For: Vania Cruz

[remove all]

**Assigned Approver**
☑ Vania Cruz

Hide requisition details 📁 expand all  📁 collapse all

▷ 📁 **My PR Approvals [1 result]**

◢ 📁 **Department Approval 10363 [1 result]**

| Requisition No. | Suppliers: | Assigned Approver | PR Date/Time | Requisitioner | Amount | Action | ☑ |
|---|---|---|---|---|---|---|---|
| ⟳ 126410079 🔍 | AMAZON CAPITAL SRVCS INC | Vania Cruz | 12/2/2019 9:38 AM | Georgine Bozi | 109.46 USD | Assign | ☑ |

1.

**Filter My Approvals**  ?

**Type**

Requisitions ▾

**Date Range**

All Dates ▾

| Requisition Name | 2019-11-25 XV56614 01 | | 📁 Folders | 0 Days in folder [My PR Approvals] |
|---|---|---|---|---|
| No. of line items | 3 | | | 1 Days in folder [Department Approval 10363] |

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Enter Search Terms

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# Returning Requisitions to Shared Approval Folders

A requisition that is pending approval will appear in a shared folder for anyone with the authorization as an approver for the department. Assign a pending requisition to yourself to signal to others that you are working on it. Your assigned requisitions will appear in your **My Approvals** folder (you can quickly access this folder by using the menu on the right to go to **Orders -> Approvals -> Requisitions to Approve**). If you decide that you are not the correct person to approve the requisition, click the check box on the right side of the screen and choose the **Return to Shared Folder** option from the dropdown menu next to the **Go** button on the top of the list.

**Questions and feedback:**

Log an RT Ticket

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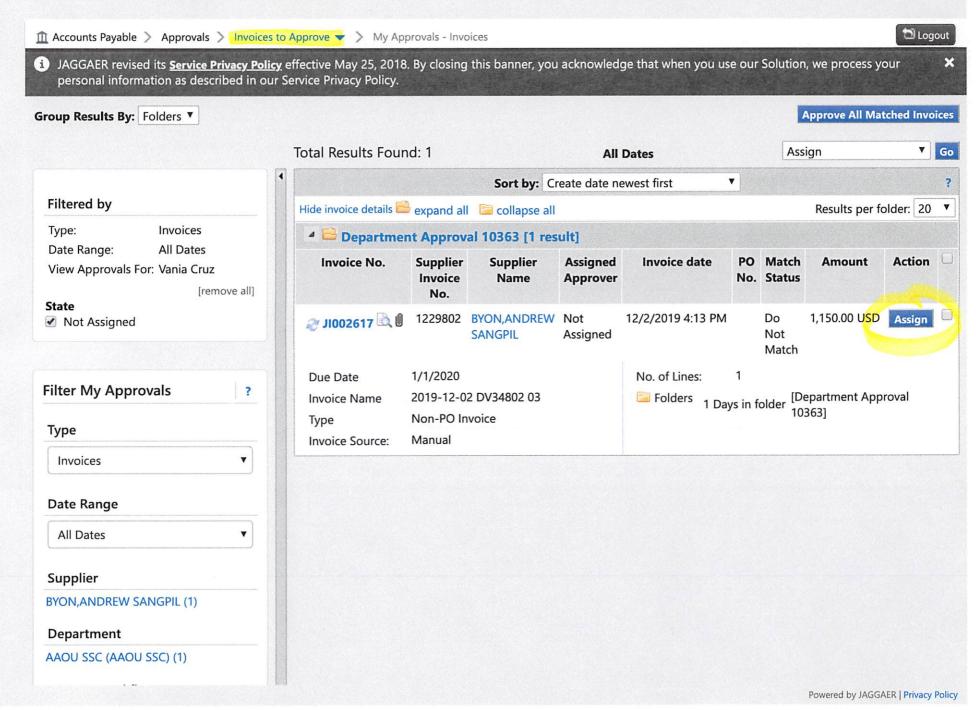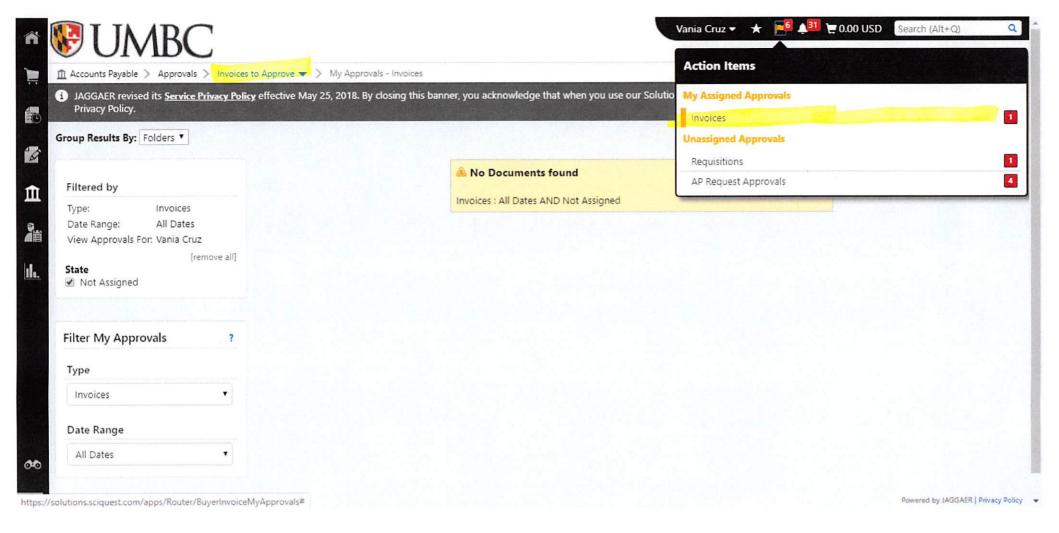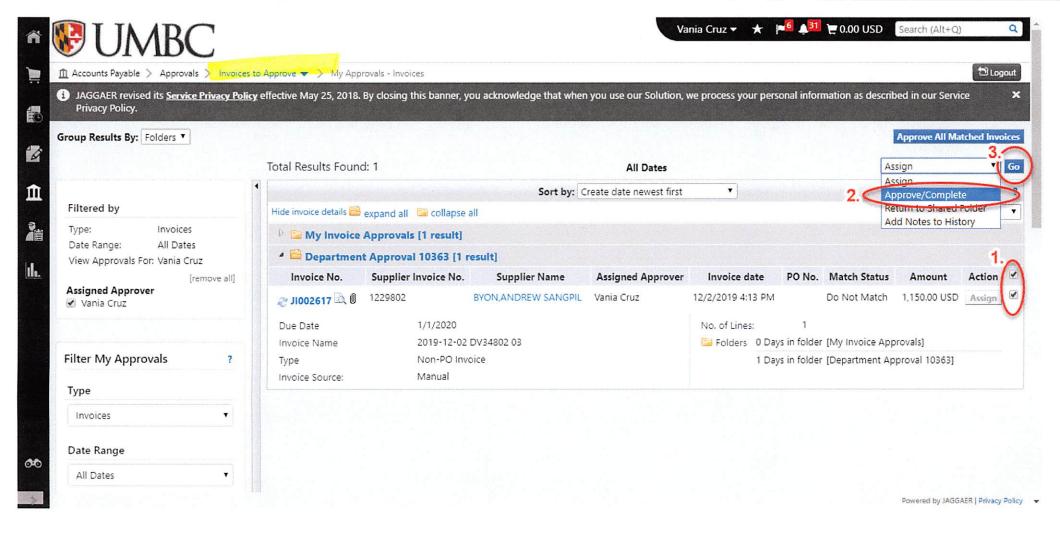
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# PAW PROCUREMENT SYSTEM INVOICE APPROVALS

🏛 Accounts Payable  >  Approvals  >  **Invoices to Approve** ▼  >  My Approvals - Invoices         🔲 Logout

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**Group Results By:** Folders ▼                                                  **Approve All Matched Invoices**

Total Results Found: 1                    **All Dates**              Assign                ▼   **Go**

| Filtered by | |
|---|---|
| Type: | Invoices |
| Date Range: | All Dates |
| View Approvals For: | Vania Cruz |

[remove all]

**State**
☑ Not Assigned

Sort by:  Create date newest first  ▼                                              ?

Hide invoice details 📁 expand all   📁 collapse all                  Results per folder: 20 ▼

◢ 📁 **Department Approval 10363 [1 result]**

| Invoice No. | Supplier Invoice No. | Supplier Name | Assigned Approver | Invoice date | PO No. | Match Status | Amount | Action | ☐ |
|---|---|---|---|---|---|---|---|---|---|
| 🔄 **JI002617** 🔍📎 | 1229802 | BYON,ANDREW SANGPIL | Not Assigned | 12/2/2019 4:13 PM | | Do Not Match | 1,150.00 USD | **Assign** | ☐ |

Due Date         1/1/2020                       No. of Lines:        1
Invoice Name    2019-12-02 DV34802 03           📁 Folders    1 Days in folder   [Department Approval
Type            Non-PO Invoice                                                    10363]
Invoice Source: Manual

**Filter My Approvals**                    ?

**Type**

Invoices                                   ▼

**Date Range**

All Dates                                  ▼

**Supplier**

BYON,ANDREW SANGPIL (1)

**Department**

AAOU SSC (AAOU SSC) (1)

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**Action Items**

**My Assigned Approvals**

Invoices                                                    [1]

**Unassigned Approvals**

Requisitions                                                [1]

AP Request Approvals                                        [4]

**Group Results By:** Folders ▾

---

### Filtered by

| | |
|---|---|
| Type: | Invoices |
| Date Range: | All Dates |
| View Approvals For: | Vania Cruz |

[remove all]

**State**
☑ Not Assigned

---

### Filter My Approvals    ?

**Type**

Invoices ▾

**Date Range**

All Dates ▾

⚠ **No Documents found**

Invoices : All Dates AND Not Assigned

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Vania Cruz ▾   ★   🏴⁶  🔔³¹   🛒 0.00 USD   Search (Alt+Q)   🔍

🔲 Logout

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**Group Results By:** Folders ▾

Approve All Matched Invoices

Total Results Found: 1                                    **All Dates**

3. Assign                      ▾   Go

**Sort by:** Create date newest first               ▾

Assign
2. Approve/Complete
Return to Shared Folder
Add Notes to History

**Filtered by**

Type:                Invoices
Date Range:          All Dates
View Approvals For:  Vania Cruz

[remove all]

**Assigned Approver**
☑ Vania Cruz

Hide invoice details 📁 expand all   📁 collapse all

▷ 📁 **My Invoice Approvals [1 result]**

▲ 📁 **Department Approval 10363 [1 result]**

1. ☑

| Invoice No. | Supplier Invoice No. | Supplier Name | Assigned Approver | Invoice date | PO No. | Match Status | Amount | Action | ☑ |
|---|---|---|---|---|---|---|---|---|---|
| 🔄 **JI002617** 🔍📎 | 1229802 | BYON,ANDREW SANGPIL | Vania Cruz | 12/2/2019 4:13 PM | | Do Not Match | 1,150.00 USD | Assign | |

Due Date        1/1/2020
Invoice Name    2019-12-02 DV34802 03
Type            Non-PO Invoice
Invoice Source: Manual

No. of Lines:        1
📁 Folders  0 Days in folder [My Invoice Approvals]
            1 Days in folder [Department Approval 10363]

**Filter My Approvals**        ?

**Type**

Invoices                      ▾

**Date Range**

All Dates                     ▾

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# PAW PROCUREMENT SYSTEM ACCOUNTS PAYABLE APPROVALS

🏛 Accounts Payable  ❯  Approvals  ❯  **AP Requests to Approve** ▼  My Approvals - Form Request       ↩ Logout

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**Group Results By:** Folders ▼

Assign to Myself ▼

Total Results Found: 4                  **All Dates**        Go

◀        **Sort by:** Submit date newest first ▼        ?

## Filtered by

Type:             Form Request
View Approvals For: Vania Cruz

📁 expand all    📁 collapse all             Results per folder: 20 ▼

▷ 📁 **Department Approval 10253-01 [1 result]**

▷ 📁 **Department Approval 10254-01 [2 results]**

▷ 📁 **Department Approval 10363-01 [1 result]**

## Filter My Approvals    ?

## Type

AP Requests ▼

🏛 Accounts Payable  >  Approvals  >  AP Requests to Approve ▼  >  My Approvals - Form Request                    ⟲ Logout

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**Group Results By:** Folders ▼

| Total Results Found: 4 | All Dates | Assign to Myself ▼  Go |

Sort by: Submit date newest first ▼                                                                              ?

📁 expand all   📁 collapse all                                                              Results per folder: 20 ▼

▷ 📁 **Department Approval 10253-01 [1 result]**

▷ 📁 **Department Approval 10254-01 [2 results]**

◢ 📁 **Department Approval 10363-01 [1 result]**

| Form Number | Name | Template Name | Requester | Assigned Approver | Request Date/Time | Folder Details | Action ☐ |
|---|---|---|---|---|---|---|---|
| 2026981 | Payment Request | Payment Request | Bozi, Georgine | Not Assigned | 12/2/2019 11:50 AM | 📁 Folders  1 Days in folder [Department Approval 10363-01] | Assign |

**Filtered by**

Type:                  Form Request
View Approvals For:  Vania Cruz

**Filter My Approvals**   ?

**Type**

AP Requests                      ▼

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**Group Results By:** Folders ▾

**Total Results Found: 3**

**All Dates**

Vania Cruz ▾    ★    ▣⁶  🔔³¹  🛒 0.00 USD    Search (Alt+Q)  🔍

## Action Items

**Sort by:** Submit date newes

◄

**Filtered by**

Type:                Form Request
View Approvals For: Vania Cruz

📁 expand all   📁 collapse all

▷ 📁 **Department Approval 10253-01 [1 result]**

▷ 📁 **Department Approval 10254-01 [2 results]**

**Filter My Approvals**    ?

**Type**

AP Requests                    ▾

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Vania Cruz ▼    ★   🏳6  🔔31   🛒 0.00 USD    Search (Alt+Q)  🔍

Group Results By: Folders ▼                                                                                         3.

Total Results Found: 1                                        All Dates                        Assign to Myself ▼    Go

                                                   Sort by: Submit date newest first ▼         Assign to Myself
                                                                                        2.    Approve/Complete
📁 expand all   📁 collapse all                                                               Return to Shared Folder  ▼
                                                                                               Return to Requester

**Filtered by**

Type:                Form Request
View Approvals For:  Vania Cruz

▷ 📁 **My Form Request Approvals [1 result]**

◢ 📁 **Department Approval 10363-01 [1 result]**

| Form Number | Name | Template Name | Requester | Assigned Approver | Request Date/Time | Folder Details | Action ☑ |
|---|---|---|---|---|---|---|---|

**Filter My Approvals**   ?

**Type**

AP Requests ▼

| 2026981 | Payment Request | Payment Request | Bozi, Georgine | Vania Cruz | 12/2/2019 11:50 AM | 📁 Folders  0 Days in folder [My Form Request Approvals] | Assign ☑ |
|  |  |  |  |  |  | 1 Days in folder [Department Approval 10363-01] |  |

1.

# PAW PROCUREMENT SYSTEM

## ADDITIONAL APPROVAL OPTIONS

*SETTING UP EMAIL APPROVAL CODES & ASSIGNING SUBSTITUTE APPROVERS*

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## Procurement & Strategic Sourcing

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# Setting Up Email Approval Code

In order to **Take Action** on approvals via email, you will first need to set up your email approval code. This is the code you will use every time you use email to approve.

First, go click your name at the top right of your screen to go to **View My Profile -> Update Security Settings -> Change Email Approval Code**. Create and enter your own code in the space provided and click **Save Changes**. Your code must be at least four characters long and may contain letters, numbers, and special characters.

Now you will have the ability to **Take Action** via email when there is a requisition or an invoice pending your approval. You can still approve through the Paw Procurement System as well (*see Approving Requisitions*).

Form requests, including payment requests, are unable to be approved through email and must be approved in PPS.

**Questions and feedback:**

Log an RT Ticket

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Enter Search Terms

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# Assigning Substitute Approvers

If you will be out of the office and wish to have someone else approve transactions, you can designate another approver as your substitute. To designate another approver as your substitute, use the menu on the left and go to **Orders -> Approvals -> Assign Substitute Approvers**. This designation may be provided to different individuals if you approve multiple departments.

If you are an approver for multiple types of documents (ie. Requisitions, Payment Requests, Invoices, Contracts), use the dropdown on the left to filter which folders you want to assign a substitute. Click the **Assign** button next to the folder and in the pop up window, type in/search for the user you wish to be your substitute. You can also select the checkbox at the top to enter a date range that will apply to this specific substitution. Click the **Assign** button to confirm your selection.

**Questions and feedback:**

Log an RT Ticket

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