

EMAIL APPROVALS

Last Updated on: 7/22/2011

The screenshot shows the 'Email Preferences' section of the user profile. It is divided into three columns: 'Administration & Integration', 'Shopping, Carts & Requisitions', and 'Purchase Orders'. The 'PR pending Workflow approval' preference is checked, and a box labeled '1.' points to it. Other preferences like 'PR Workflow Notification available' and 'PR Workflow complete / PO created' are also checked. The 'Purchase Orders' section has several preferences checked, including 'PO sent to supplier' and 'PO rejected'.

1. To utilize the new **Email Approvals** feature, you must have the **PR pending Workflow approval** email preference enabled within your user profile. In addition, the following steps will need to be taken to allow you to complete emails approvals:

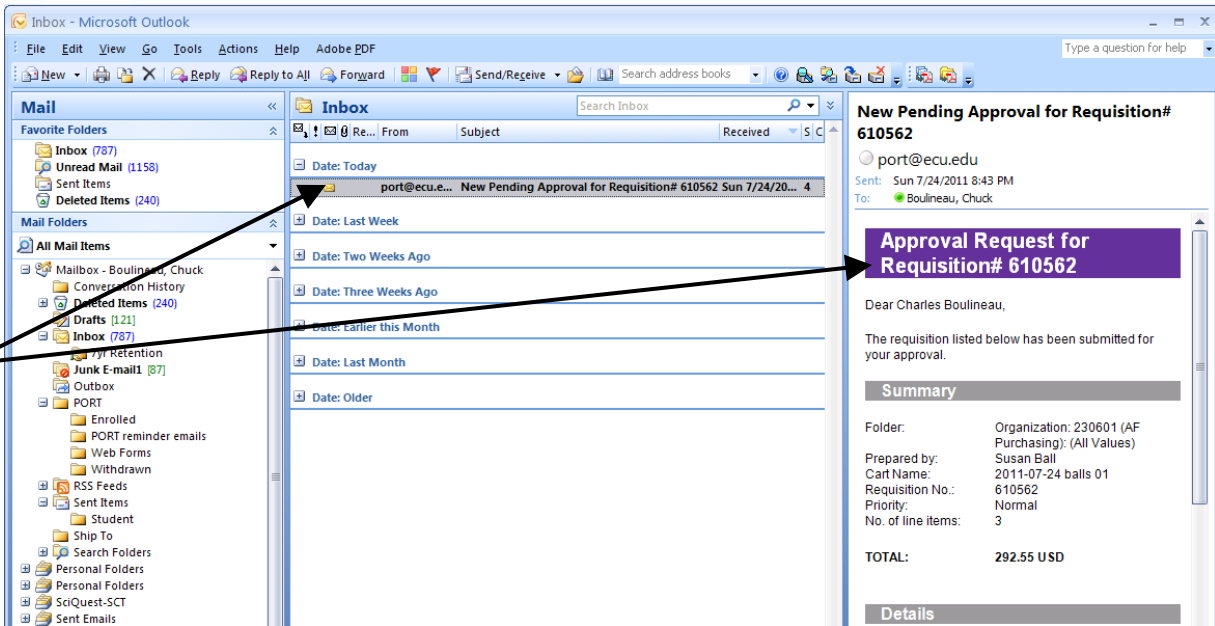
- Attend a brief demo on email approvals
- Set Email Approval Code on your user profile (See 2nd snapshot)
- Materials Management staff will turn on the following user permission: **Approve/Reject Requisitions via email**

The screenshot shows the 'User Identification' section of the user profile. It contains fields for First Name (Charles), Last Name (Boulineau), Phone Number (919 328-1924), E-mail Address (boulineauc@ecu.edu), Department (Administration and Finance), Position, Badge Id, User Name (boulineauc), Question, Answer, Confirm Answer, Authentication Method (Local), and Email Approval Code (*****). A box labeled '2.' points to the 'Email Approval Code' field.

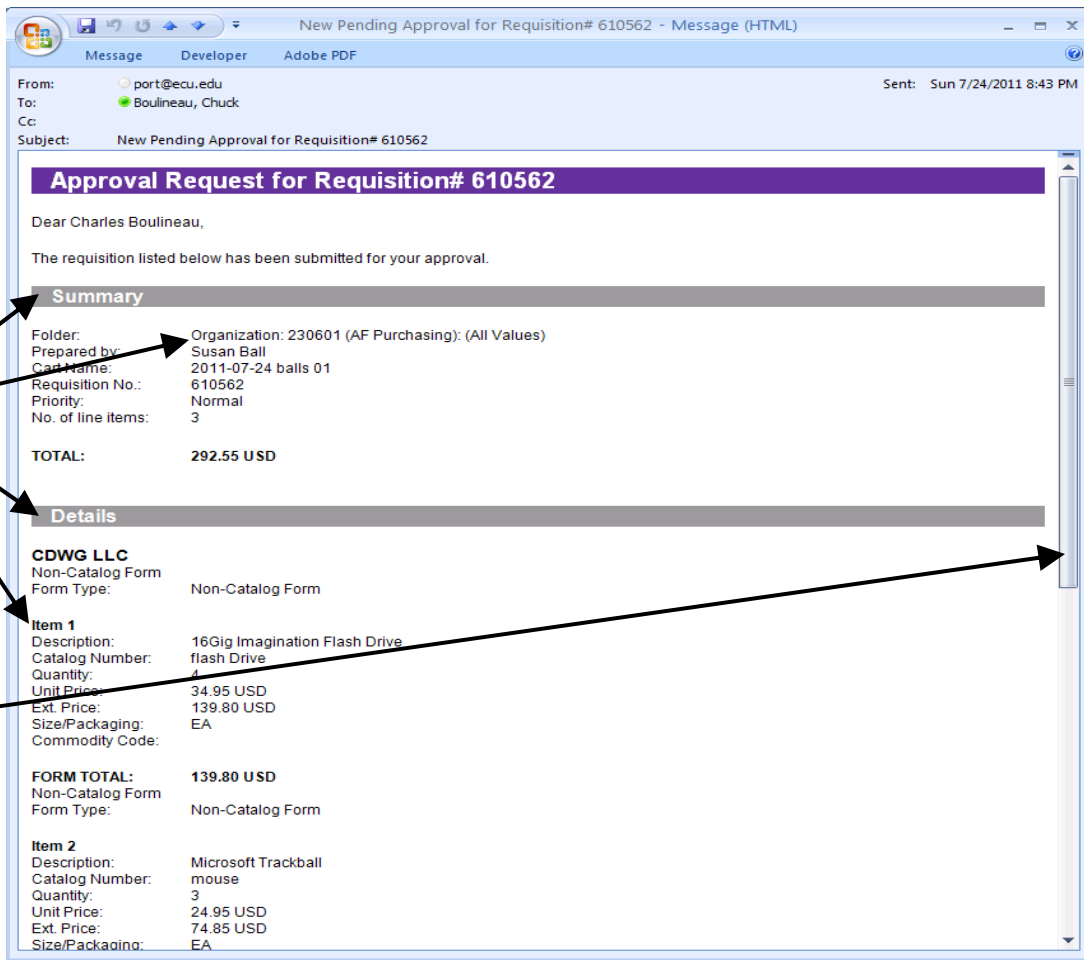
2. Set your **Email Approval Code**. **Note:** It must be at least 4 digits.

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3. Open the PORT enhanced approval email to see details of the requisition and take action.



- 4. Note the Summary, Approval Folder, Details, and line item information.
- 5. Scroll down the email to see more details for the requisition and take action.

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7.

6.

From: port@ecu.edu
To: Boulineau, Chuck
Cc:
Subject: New Pending Approval for Requisition# 610562

Sent: Sun 7/24/2011 8:43 PM

Item 3
Description: Microsoft Bluetooth Keyboard
Catalog Number: keyboard
Quantity: 2
Unit Price: 38.95 USD
Ext. Price: 77.90 USD
Size/Packaging: EA
Commodity Code:

FORM TOTAL: 77.90 USD
TOTAL: 292.55 USD

FOAPAL / Ship Codes

Chart: E - East Carolina University
Fund: 111170 - AA General Institutional Support
Organization: 230601 - AF Purchasing
Account: 72111 - Office Supplies GIK
Program: 0000 - Default Program Code
Activity:
Location:

FOAPAL Codes values vary by line

Ready to approve, reject or assign this document to yourself? **Take Action**

Additional Information

Summary Details
Work Order #:
State Exempt: None of the Above
Backup Required: No
Backup Type: None - no backup
Pricing Method:
Pricing Ref #:
Special Instructions: None
Buyer Contact Info:
Final PR Review: No
ITCS Approval: No
NC Preference: No

6. Note the comment that **FOAPAL Codes values vary by line**. **Important Note:** If there are multiple FOAPAL values at the header or line item, only the initial FOAPAL string will be displayed in the detailed email. **If you need to see all FOAPAL strings before approving, you will need to log into PORT.**
7. For this example, we will click on the **Take Action** button to approve the requisition.

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East Carolina University

Requisition 610562
Status Pending
Shopper Susan Ball
Approver Charles Boulineau

Select an action:

Approve
 Assign to myself
 Reject
 Return to Requisitioner

Comment (Optional):

Enter your approval code to submit:
.....

8. [Callout to Approve radio button]
9. [Callout to masked input field]
10. [Callout to Submit button]

8. From here, you can take one of the following actions and add a comment: **Approve**, **Assign to myself**, **Reject**, or **Return to Requisitioner**. For this example, we will Approve the requisition.
9. Enter your **Email Approval Code**.
10. Click the **Submit** button.

East Carolina University

Requisition 610562
Status Pending
Shopper Susan Ball
Approver Charles Boulineau

Windows Internet Explorer

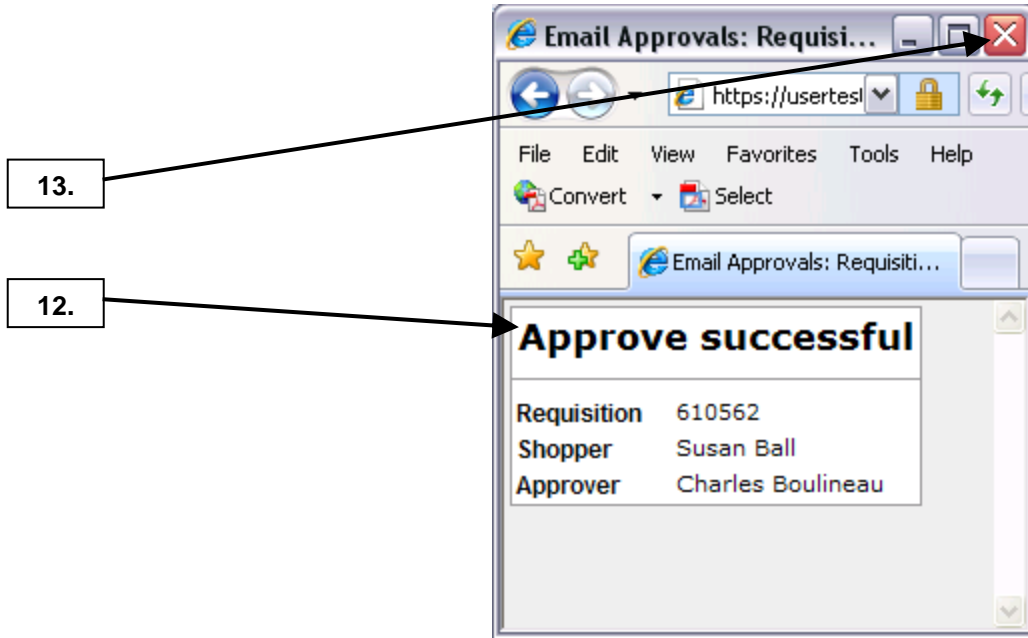
Are you sure you want to approve this?

11. [Callout to OK button]

11. Click the **OK** button to confirm the approval.

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- 12. Note the confirmation that the approval was successful.
- 13. You can close the Browser. This completes the steps for this procedure. .