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OBJECTIVES

The purpose of this handbook is to familiarize Fund Approvers with the Eagle's Purch a SciQuest Higher Markets application. We hope it will help you:

- Understand how to access the system
- Understand how to navigate the system
- Understand how to approve a requisition
- Understand how to return a requisition to a requestor
- Understand the difference between rejecting and returning
- Understand how to reject a requisition
- Learn how to assign a substitute approver

APPROVER ROLE

**Approver:** is a person that has been granted access to approve requisitions from the fund level, area level or functional level. An approver can be a shopper but cannot be a requisitioner.
Exercise: Logging into the Application

Objective: To log a user with appropriate permissions into the application

Steps:
1. Go to [www.nccu.edu](http://www.nccu.edu)
2. Login on to MYEOL
3. Double click the Employees Folder, under the My Navigation Pane
4. Click the Eagle's Purch to access system
   a) Eagle's Purch (Prod): the live site *(User ID and password is the same used to login to MYEOL)*
   b) Eagle's Purch (Test): the test site (User ID is the same used to login to MYEOL, password may vary contact System Administrator for password reset)
SITE NAVIGATION

Upon logging into the Eagle's Purch, it is possible to begin navigating through the system. The system can be navigated at two primary levels, which are shown below:

**Starting Point for Navigation:**
- **Horizontal Tabs**
  - For example, home, product search, carts, profile, user mgt, reports, catalog mgt, organization setup, field mgt

**Horizontal Sub-Tabs**
- For example, current cart, draft carts, PO History, my requisitions, registrations, supplier classes

**Sub-tabs and Sections**
- For example, Favorites, Quick Order, Product Search and Forms on the home > desktop screen

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**NAVIGATION BASICS:**

> **How to get around the site...**

1. The first step of navigation is to select the desired area of the system in which to work using the navigation tabs (buttons) along the top of the application.

2. To further drill-down into the system, select the appropriate sub-tab beneath the top level navigation.

3. Various screens have additional tabs within the screen, such as on the product search screen which contains Favorites, Quick Order, Product Search, and Forms on tabs within the screen. Select a tab to retrieve the specific screen desired.
1. **User Information.** In the upper left-hand corner of the application, information about the user is displayed within a boxed area.

2. **Screen Title.** In the application header, just below the user information box, the title of the current screen displays.

3. **Cart Summary.** The upper right corner of the application displays a summary of the shopping cart. Included is the cart name (by default, this is your user name, the date, and sequential order # for the day), the number of items in the cart, and the total cart amount. Click this shortcut to go directly to the cart page where you the cart details can be reviewed and updated.

4. **Search for.** This feature allows a variety of searches to be executed from anywhere within the application. With the search fields readily available in the drop down menu, it is no longer necessary to navigate to specific screens to run the desired search.

5. **Navigation tabs.** Across the top of the application are navigation tabs. By clicking on these tabs, the information in the screen below refreshes to display the topic or function covered in that particular part of the application.

   a. **Home/Shop:** is used for shopping, and provides quick access to other key parts of Eagle’s Purch as Favorites and Forms.
   
   b. **Favorites:** is used to create and define shared and personal favorites folders and items. Items can be moved and copied between folders; current folder and items can be edited and removed. Favorite items can be added through search results and the checkout screens.
   
   c. **Forms:** are used to create non-catalog or specific form orders for an item or service.
   
   d. **Carts:** are used to view and modify the current shopping cart, create new carts and delete existing carts, and prepare the cart for processing (adding shipping, account information, etc.)
   
   e. **History:** contains a repository of various documents within Eagle’s Purch. Purchase requisitions are available for viewing, depending on the permissions grated to the requestor.
f. **Settlement**: provides access to system receipts and invoices along with the ability to create new receipts and invoices, given the user has the proper permissions. (This function is not yet available)

g. **Profile**: is used to review and update personal user information such as time zone, assigned roles, approver information, email preferences and more.

6. **Home/Shop**– provides access to the desktop home screens. From the desktop home screen, searches can be performed, the organizational message is displayed, and purchasing information can be reviewed. The last sub-tab selected is remembered and displayed the next time the home navigation tab is selected.

   a. **My Favorites**– are used to create and define personal favorite’s folders and items. Items can be moved and copied between folders; current folders and items can be edited and removed. Note: Favorite items can be also be added through search results and the checkout screens.

   b. **Product Search**– contains the same four tabbed screens shown on the home => desktop page, which allow detailed product searches, quick searches in the case where the product SKU is known, and ordering of favorite items.

   c. **Carts**– is used to view and modify the current shopping cart, create new carts and delete existing carts, and prepare the cart for processing.

7. **Navigation Sub-tabs**. Beneath the top-level navigation is a level of sub-tabs. By clicking on these sub-tabs, the information in the screen below refreshes to display the specific topic or function covered in that particular part of the application.

8. **Search Options**. To access a specific function, click on the tab at the top of the box. The active tab is highlighted. From the Search tabs, a wide variety of functions are available, including the ability to execute detailed product searches and quick searches, in the case where the product SKU is known, and add favorite items to the cart.

9. **Online Help**. Online Help is accessed by clicking on the question mark anywhere in the application or by clicking on hyperlink text. Text with associated Help is indicated by text that changes colors when mousing-over the text. Much of the text in the application can be selected and a secondary Help window displays.
APPROVING A PURCHASE REQUISITION (PR)

- Click Approvals tab

- View the approval folders for your account or workflow

- Assign transactions in folders by selecting the Select checkbox (✓) next to desired transactions and clicking on assign in the drop-down box, Click Go
  - Or simply click the Assign to the left of the select checkbox

- Transaction will move from organization folder to “My PR Approvals” folder
• Click on the PR number in “My PR Approvals” folder

APPROVING A PURCHASE REQUISITION (PR) CONT’D

• View details of PR (items, quantities, description, funding, account codes, etc) and scrolling down and clicking on Account Codes sub-tab
• Approvers can view the workflow steps by reviewing approval at the requisition screen (Click on PR Approvals tab)

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APPROVING A PURCHASE REQUISITION (PR) CON’T

• Select Approve/Complete in the Apply Action to Select PR(s) drop-down menu box and click GO to approve transaction.

• Transaction is now approved and has moved on to any additional workflow
RETURNING A PURCHASE REQUISITION (PR)

- Click Approvals tab

- View the approval folders for your account or workflow

- Assign transactions in folders by selecting the Select checkbox (√) next to desired transactions and clicking on assign in the drop-down box, Click Go
  - Or simply click the Assign to the left of the select checkbox

- Transaction will move from organization folder to “My PR Approvals” folder
• Click on the PR number in “My PR Approvals” folder

• View details of PR (items, quantities, description, funding, account codes, etc) and scrolling down and clicking on Account Codes sub-tab

• Approvers can view the workflow steps by reviewing approval at the requisition screen (Click on PR Approvals tab)
RETURNING A PURCHASE REQUISITION (PR) CON’T

- Select Return to Requisitioner in the Apply Action to Select PR(s) drop-down menu box and click GO to approve transaction.

- PR has been returned to the requestor
REJECTING A PURCHASE REQUISITION (PR) NON-PUNCH OUT VENDORS

***Only Non-Catalog and Hosted Catalog Orders can reject line items***

- Click Approvals tab

- View the approval folders for your account or workflow

- Assign transactions in folders by selecting the Select checkbox (√) next to desired transactions and clicking on assign in the drop-down box, Click Go
  - Or simply click the Assign to the left of the select checkbox

- Transaction will move from organization folder to “My PR Approvals” folder
REJECTING A PURCHASE REQUISITION (PR) CONT'

- Click on the PR number in “My PR Approvals” folder
- View details of PR (items, quantities, description, funding, account codes, etc) and scrolling down and clicking on Account Codes sub-tab

- Scroll down to heading “Supplier/Line Item Details”
• Click in the box to the right of the “Ext. Price” column to select an item or all items to be rejected***Only Non-Catalog and Hosted Catalog Orders can be rejected like this***

• Once the item selected (✓), go the “for selected line items” box and select the option in the list that says “reject selected items” and then click GO.
Complete the rejection by scrolling all the way to the top of the form and clicking on GO in the upper right-hand corner of the screen where the “available action” is “Approve/Complete Step”

- Item(s) are now rejected
- Possible notification sent back to user if email preferences has been turned on
- Items not selected for rejection will move along the approval workflow
ASSIGNING SUBSTITUTE APPROVERS

If the approver is going to be out for an extended period of time and will not have access to email or the web, Eagle’s Purchasing allows approvers to designate a substitute approver. The substitute must be recognized as an approver and cannot be a shopper or requestor.

- Navigate to the Approval tab
- From My Approvals list, click on [Assign Substitute] to open User Search dialog box
- Enter search criteria, either user name or last name of the substitute, then click Search
- Search Results will return the Approvers that meet the criteria
• Select and Choose Selected User

• My PR Approval list will change to indicate substitution

• To remove substitution, navigate to My PR Approvals and select [End Substitution]