Step-by-Step Guide

Approver: Reviewing Team Carts

1. Approvers may view Shopping Carts requiring their approval by clicking on the link in the notification email.

2. Approvers may view also Shopping Carts by logging into the Duke@Work website (http://work.duke.edu) and clicking on the Universal Work List tab.

3. Be certain the Tasks tab is selected. If not, click on the tab, turning it dark blue.

4. You may have other documents (iForms, Journal Vouchers) to review and take action on.
5. Identify the Shopping Cart you wish to review and approve in the Subject column and highlight the row. This action will open a preview of the cart below the Universal Worklist.

6. You may take action on the cart by reviewing it in the preview window and clicking the appropriate button:

   - Approve: approve the cart without opening a detailed view;
   - Reject: reject the cart, returning it to its Submitter;
   - Details: opens the detailed view of the cart;
   - Print Preview: opens a print window of the cart's line items;
   - Resubmit: removes the cart from your Universal Worklist and brings it back for review on the specified date;
   - Forward: sends the cart to another Approver; or
   - Assign to Me: permits you to be the sole “owner” of the cart’s workflow when there may be numerous approvers. If you click Assign to Me, other approvers will not be able to view or edit the cart.
7. You may also take action by clicking directly on the **Complete Shopping Cart** link to open a detailed view of the cart.

8. Review any Notes in the Approval Note box. If you wish to add a comment, click the **Add Comment** link and type it into the box.

9. Select an item in the Item Overview section and click the Details or on the number in the Line Item column button.

10. Work your way through the tabs on the bottom half of the screen.

11. If you need to make any changes to the data for the Shopping Cart, click the Edit button.
12. The Additional Information box cautions that any changes may lead to a change in or a restarting of the approval process.

13. Click OK or Cancel as appropriate.

14. On the **Item Data** tab, review the details about the item.

15. On the **Account Assignment** tab, review the financial account assignments.

16. On the **Notes and Attachments** tab, check for any Internal Notes and Supplier Text Notes.
17. If any Notes are present, click on the link to open the Note, review the text, and then click the Close boxes.

18. Check the Attachments box for any attached documents.

19. If any attached documents are present, click on the link to open the attachment, review the attachment, and then click the Close boxes.

20. On the Delivery Address tab, review the Delivery Address.

21. On the Supplier Info tab, review the supplier’s name and number.

22. On the Approval Process tab, review the various approvals required for the cart. If additional ad hoc approvals are needed, add them by following the steps beginning on page 52.
23. On the Related Documents tab, Note that the Purchase Order information will be provided after the cart has received all approval and has been converted into a Purchase Order.

24. Continue the above steps for each item.

25. If you have questions about the Shopping Cart or find things that need to be corrected, click on the Add Comment link and enter your question or request in the Approval Note field.
26. Then click the **Inquire** button. This action will return the cart to the Submitter for the information you seek or for corrections to be made.

27. Once you have reviewed all the information about the cart, click the **Approve** button to send the cart to the next step in the approval process.

28. **You should never click the Reject button.** If you have questions or concerns about a Shopping Cart, use the Inquire process outlined above.

29. Close your browser. The cart will automatically move forward to become a Purchase Order OR move to external departments for review and further action if needed.
Step-by-Step Guide

Approver: Adding an Ad Hoc Approver or Reviewer

There may be situations when a Shopper, Submitter, or Approver wishes to have another person Approve or Review a Shopping Cart. In those instances, the user can add an Ad Hoc Approver or Reviewer for the specific cart. Ad Hoc Approvers must take action to approve the cart, while Ad Hoc Reviewers may simply review the contents of the cart without taking action.

1. Open the cart requiring the Ad-Hoc Approval or Review.

2. Click on the Approval Process: Display/Edit Agents.

3. From the Approval Process Overview window, click on the Header tab.

4. Click the Add Approver button to add an Approver or the Add Reviewer button to add a Reviewer.
5. In the Add Approver or Add Reviewer box, enter the approver’s Net ID or click the drop-down button to search for the Net ID by name. Then click OK to accept.

6. The Approver’s or Reviewer’s name will populate the Processor field.
7. Repeat steps above for all additional Ad Hoc Approvers or Reviewers.

8. Click the **OK** button and complete the order or approval process.

9. This specific cart will route to the Ad Hoc Approver or Reviewer after the initial approval has occurred.