Adding an Additional Approver by Document Comments

One way to get additional approval for a purchase requisition is to add Document Comments. This will email the additional approver; they can reply and the consultation is documented in the Comments section. The purchase requisition will stay in the original user’s queue while they await a reply.

1. As a Shopper, when you have completed shopping, proceed to checkout from your shopping cart (Figure 1).

![Figure 1]

2. When you are checking out, select the “Document Actions” drop down menu. From the drop down menu, select “Add Comment” (Figure 2).

![Figure 2]
3. On the “Add Comment” screen, select “add email recipient…” to send an email notification to the additional approver (Figure 3).

4. When searching for an assignee, you can narrow your search by entering the appropriate criteria, then select Search (Figure 4).
5. After searching for an assignee, select the appropriate approver (Figure 5).

6. After you select the appropriate approver, you will be brought back to the Add Comment screen. Notice the selected approver populated under the Email Notification field and their name is checked. Here, you can add the comments to send to the additional approver. You can also attach a document. When finished, select “Add Comment” (Figure 6).

Figure 5

<table>
<thead>
<tr>
<th>Name</th>
<th>User Name</th>
<th>Email</th>
<th>Phone</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEADOWS, ALISON</td>
<td>alisonma</td>
<td><a href="mailto:alisonma@buffalo.edu">alisonma@buffalo.edu</a></td>
<td>+1 716-645-4521</td>
<td>[select]</td>
</tr>
<tr>
<td>MEADOWS, PATRICK</td>
<td>pmeadows</td>
<td><a href="mailto:pmeadows@buffalo.edu">pmeadows@buffalo.edu</a></td>
<td>+1 716-645-2521</td>
<td>[select]</td>
</tr>
</tbody>
</table>

Figure 6

Add Comment

This will add a comment to the document.

- [ ] DALTON HOLLER (Prepared by) <daltonho@buffalo.edu>
- [X] ALISON MEADOWS <alisonma@buffalo.edu>

Add email recipient...

Ali, please advise which account to use for this purchase and confirm your approval. I have attached the quote for your reference.

Attach file to this document (optional):

- Attachment Type: File
- File Name: Quote 09571
- Choose File: PRENTICE Q... LABOR.pdf

Add Comment Close
7. When you have completed adding the comment, an email notification will be sent to the additional approver prompting them to take action. They will receive the following email notification (Figure 7).

Figure 7

8. The purchase requisition will remain in your queue while the additional approval is replying. When the approver replies, you will receive the following email notification that the original comment has been replied to. You can select “View Comment” link to access the requisition (Figure 8).

Figure 8
9. The link will bring you to the “Business Purpose/Comments” tab of the requisition. *Note: the link may ask you to sign into Shop Blue.* Here you view the additional approver’s response. Upon approval, you can take any necessary action to complete the order and then place your order. The cart will then leave your queue and be sent to the original approver (Figure 9).

![Figure 9](image-url)