CAMP IPPS 2016
AGENDA
What does it mean to approve in Marketplace?

• Requisitions
  • 1 Reason for BU Approval
  • 3 ways to approve
    • In the application
    • Email Approvals
    • Mobile App NEW

• Invoices
  • 3 Reasons for BU Approval
    • Invoices above $10K Certifications
    • Invoices that are Out of Tolerance
    • Invoices Outside of Period of Performance
  • 1 way to approve
Why am I being asked to approve this Requisition?

Why does the Requisition require approval?
- Requisition's total dollar amount exceeds the Requisitioner's purchasing authority on Indexes they're authorized to purchase on.

Why is the Requisition coming to me for approval?
- The Index referenced on the Requisition is one you're authorized to approve against.
SHOPPER ROLES
Why some Requisitions require approval

Can purchase up to $5,000 dollars on home department's Index without approval

Can purchase up to $2,500 dollars on home department's Index without approval

Can purchase up to $500 dollars on home department's Index without approval

Assigns Index and Submits Cart

Shops in Marketplace

Department Buyer 5,000
Department Buyer 2,500
Department Buyer 500
Index-Informed Shopper
Window Shopper
BUSINESS UNITS
Approval Routing

- Grouping of Indexes and people authorized to approve against those Indexes
- 3 approval levels
- Non-hierarchical approval process
APPROVING REQUISITIONS

In Marketplace

[Image of Marketplace interface showing requisition approval process]
• In your Marketplace Profile, add an Email Approval Code
  • Update Security Settings -> Change Email Approval Code

• Emails will now contain a button at the bottom to “Take Action”
  • Enter Email Approval Code
  • Take action on Requisition
Business Unit: 103 (Purchasing - Marketplace): (0.00 - 2,499.99) USD Approval Request for Requisition# 1532792

Dear Business Unit Approver Seven,

The Requisition detailed below has been submitted for your approval. If this is an order you submitted, the system will require approval from a different Approver. You will not be able to approve your own order.

**Summary**

Folder: Business Unit: 103 (Purchasing - Marketplace): (0.00 - 2,499.99) USD
Submitted By: Nikki Giqunata
Cart Name: 2016-03-15 nqunata 03
Requisition No.: 1532792
No. of line items: 6

**TOTAL:**  564.28 USD

**Details**

**Office Max Incorporated**

Item 1
Description: Boise Aspen Multipurpose Paper, 8 1/2in x 11in, 20 Lb, 30% Recycled, 500 Sheets Per Ream, Case Of 10 Reams
Catalog Number: P10545901CTN
Quantity: 1
Unit Price: $33.84 USD
Ext. Price: $33.84 USD
Easy Buy: true
UCSD Green: true
Contract No.: OfficeMax Test (OfficeMax Test)
Size/Package: CT
In your Marketplace Profile, add an Email Approval Code

Update Security Settings -> Change Email Approval Code

Emails will now contain a button at the bottom to "Take Action"

Enter Email Approval Code

Take action on Requisition

APPROVING REQUISITIONS

Email Approvals

Payment: Index(es)

Index (CAPS ONLY): BFSPUOP: BFS-PURCHASING OPPORTUNITY FUNDS-07427A-061110-064000
Business Unit: 103: Purchasing - Marketplace
Department: Business and Financial Services

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

Additional Information

Summary Details
Lab / Work Group: Briggs Lab - Biology
Phone No.: 
Customer Fax: 
RUA No.: 
Custody Code: 
Accessory to UCID No.: 
Fabrication No.: 
Work Order No.: 
Overhead Indicator: No
Disbursement: +1 (258) 534-4000
Phone No.: 
Purchasing Phone: 
Comments: (0)

Other Possible Approvers
Jennifer Glassman
Edward Johnson
Gayle Ta
1. Invoices above $10K require certification of receipt of goods/services before payment

2. Out of Tolerance:
   1. Invoices above $5K that include services or inventorial equipment require a PO revision if the invoice line exceeds the PO line by 10% or more of the price
   2. Invoices that only includes goods will create a notification to BU Approvers if an invoice line exceeds the PO line by a quantity of 1, or 20% or more of the price

3. Period of Performance Exceeded:
   1. Invoices against a PO whose stated Period of Performance has been exceed by more than 30 require a PO revision
Don’t forget to stop by and visit us in the Price Center East Ballroom