Fisher Scientific

ASSIGNING USERS AND APPROVERS

To define purchasing and payment privileges, apply product or supplier restrictions, and/or reassign level of authority:

1. Click **ADMIN > USERS** in the navigation bar at the home page.
2. Click the **USER NAME** of the profile you wish to modify.

To assign or reassign users to approvers:

1. Click **ADMIN > USERS** in the navigation bar at the home page.
2. On the left of the page, enter the USER ID of the subordinate in the **ASSIGN THIS USER** field. Then enter the USER ID of the immediate Approver in the **TO THIS APPROVER** field.
3. Click **ASSIGN.**

To notify others of orders that have been placed:

1. If for yourself, click your **NAME** in the navigation bar at the home page to open your personal profile.
2. If for a subordinate, click **ADMIN > USERS** in the navigation bar, then the subordinate's name to edit the profile.
3. In the **E-MAIL CONFIRMATIONS** field, enter the e-mail address(s) of those who should receive copies of order confirmations.

To designate required approver(s):

1. Click **ADMIN > USERS** in the navigation bar at the home page.
2. Click the **APPROVER'S NAME** to edit the profile.
3. Check the box for **MUST APPROVE ALL SUBORDINATES' REQUISITIONS**.
4. Repeat process for each Approver.

To designate a substitute approver:

1. If for yourself, click your **NAME** in the navigation bar at the home page to open your personal profile.
2. If for another Approver, click **ADMIN > USERS** in the navigation bar, then the APPROVER'S NAME to edit the profile.
3. At the bottom of the profile, type in the **USER NAME** of the designated substitute Approver in the **OUT-OF-OFFICE SUBSTITUTE** field.
4. Check the **CURRENTLY OUT-OF-OFFICE** checkbox when the substitution is to begin.
5. Make a note not to forget to uncheck the **CURRENTLY OUT-OF-OFFICE** checkbox when you return.

DOLLAR RULES/APPROVAL FUNCTIONS

To set spending caps that limit the size of orders:

1. Click **ADMIN > DOLLAR RULES** in the navigation bar at the home page.
2. Click **CREATE NEW RULE** under **DOLLAR LIMITS**.
3. Fill in the fields provided.
4. Assign users to the new rule by clicking the checkboxes next to their **USER NAME.**

To institute rules that force spending approvals:

1. Click **ADMIN > USERS** in the navigation bar. Make sure that all users are assigned to an Approver.
2. Click **DOLLAR RULES**.
3. **CREATE A RULE** in the Dollar Approvals field for spending approval levels.
4. Fill in the fields provided.
5. Assign users to the new rule by clicking the checkboxes next to their **USER NAME**.

To create an Approver Selection Group:

1. Click **ADMIN > USERS** in the navigation bar.
2. Click **CREATE AN APPROVER SELECTION GROUP** to create a new Approver group.
3. Check the box for **MUST APPROVE ALL SUBORDINATES' REQUISITIONS.**
4. Select which Approvers users may choose.

To review and deny/postpone/approve requisitions:

1. Click **APPROVE REQUISITIONS** in the navigation bar to review all of the requisitions awaiting your approval.
2. Deny, postpone (and edit), or approve requisitions as needed.
3. Click **SUBMIT** to send approved requisitions to Fisher.

To view a requisition audit trail (history):

1. Click **APPROVE REQUISITIONS** in the navigation bar at the home page, then **EDIT** in the PO Number field. You will advance to **ORDER DETAILS**.
2. Click **VIEW THIS ORDER'S AUDIT TRAIL** for its history.

Alternate:

1. Click **REVIEW REQUISITIONS** in the navigation bar. Search and sort by purchase order number, Fisher order number, order date, and/or order status.
2. Click **SUBMIT.**
3. Click **ORDER NUMBER** to **VIEW AUDIT TRAIL**.

FUND TRACKING

To create a Fund after your initial Fund request has been activated:

1. Go to **ADMIN > FUND TRACKING** in the navigation bar at the home page.
2. Click **CREATE NEW FUND**.
3. Type the **FUND NUMBER** (tracking number) in the field provided.
4. Type the **FUND NAME** in the field provided.
5. Enter the dates for which the fund is valid in the **DATE RANGE** fields.
6. Type the dollar-amount limits in the fields provided. “PER RELEASE” is the total release amount that cannot be exceeded. "PER LINE" is the individual item price that cannot be exceeded in any order.
7. Click one of the **APPROVAL REQUIREMENTS** checkboxes: **MUST FOLLOW EXISTING APPROVAL RULES** if you want orders placed against this fund to follow or **IGNORE ANY EXISTING APPROVAL RULES t**o bypass the dollar approval rules you've established for other orders.
8. Click **NEXT** to enter fund amounts.
9. Type total fund amount in the **FUND TOTAL** field.
10. Type the set-aside amount in the **SET ASIDE** field.
11. Click **NEXT** to assign requisitioners to the new fund.
12. Highlight the name of the user(s) who will be able to place requisitions against the new Fund, then use the **>>** or **<<** button to move them to/from the **ASSIGNED REQUISITIONERS** field.
13. Click **NEXT** to create e-mail notifications before the fund end date or when the current available balance reaches a level you specify. If you don't want e-mail notifications, leave this screen blank and click **NEXT**.
14. To receive e-mail notification by **DATE,** click the checkbox, enter the number of days before the end date that you want to be notified, and click the **ME** checkbox. Click the **USERS** box to notify all assigned users. If there are others you want to notify, click the **OTHER** box and type their e-mail addresses in the space provided.
15. To receive notification by **DOLLAR AMOUNT**, click the checkbox and enter the available balance that must be reached to trigger notification. Click the **ME** checkbox to receive the e-mail. Click the **USERS** checkbox to notify all assigned users. If there are others you want to notify, click the **OTHER** checkbox and type their e-mail addresses in the space provided.
16. Click **NEXT** to go to the **REVIEW FUND SUMMARY**.
17. (Optional) Click **EDIT** to go back to the original page if you need to make changes.
18. Click **SUBMIT** to return to the **FUND SUMMARY**.
19. Click **RETURN TO FUND LIST** to go back to the main **FUND TRACKING** page.

To edit a Fund:

1. Go to **ADMIN > FUND TRACKING** in the navigation bar at the home page.
2. Click **EDIT** for the fund you want to revise to advance to the **REVIEW FUND SUMMARY** page and view that fund.
3. (Optional) Click **EDIT** to if you need to go to the original page to make changes.
4. Click **SUBMIT** to return to the updated **FUND SUMMARY**.
5. Click **RETURN TO FUND LIST** to go back to the main **FUND TRACKING** page.

To Close a Fund or Reopen a Closed Fund:

1. Go to **ADMIN > FUND TRACKING** in the navigation bar at the home page.
2. Click **EDIT** for the fund you want to close to go to the R**EVIEW FUND SUMMARY** for that fund.
3. Click **CLOSE THIS FUND** or **REOPEN THIS FUND**.
4. Click **RETURN TO FUND LIST** to go back to the main **FUND TRACKING** page.

To Review Fund History:

1. Go to **ADMIN > FUND TRACKING** in the navigation bar at the home page.
2. Click **HISTORY** next to the fund you want to review.
3. Click the **RELEASE NUMBER** link for details about that requisition.
4. Click **BACK** to return to the **FUND HISTORY** page.
5. To return to the main **FUND TRACKING** page, click **RETURN TO FUND LIST**.

To request a reconciliation report:

1. Go to **ADMIN > FUND TRACKING** in the navigation bar at the home page.
2. Click **HISTORY** for the fund you want reconciled.
3. Click **REQUEST A RECONCILIATION REPORT.**
4. Click the **CALENDAR ICONS** to change the reconciliation report **DATE RANGE.**
5. Change or add names of those who should receive the reconciliation report by typing over the **E-MAIL ADDRESSES.**
6. When you're satisfied with your entries, click **SUBMIT**.