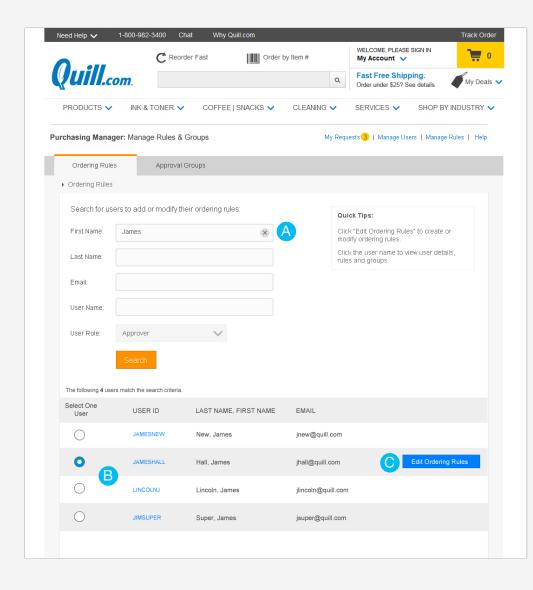
Purchasing Manager

Manage Rules and Approval Groups

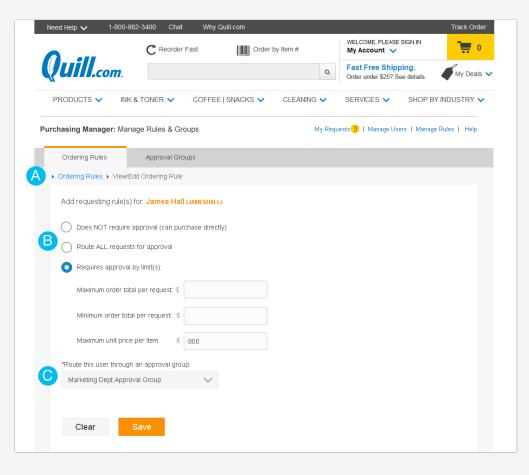
Search for Users to Add or Edit Their Rules



From this screen, you can create or edit ordering rules for individuals.

- A Search for an existing user from your organization registered on Purchasing Manager by first name, last name, email, user name or user role. Then click 'Search'.
- B Your search results display in this area and from here you may select the user you wish to edit the ordering rules for. You may also click on the blue user name to view their information.
- Click 'Edit Ordering Rules' to add or edit their ordering rules.

Creating or Editing a User's Ordering Rules



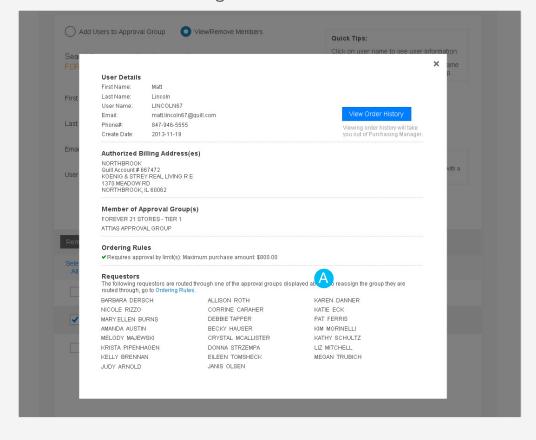
- A Use the breadcrumb links if you need to go back a step. If you click 'Ordering Rules' it will take you back to the previous screen where you can search for users.
- All new Approvers will be defaulted with the first option: "Does NOT require approval (can purchase directly)."

All new Requestors will be defaulted with the second option: "Route ALL requests for approval"

If you apply rules to a user, you will be required to route the user through an approval group using the drop down option.

The approval group will consist of at least one Approver and any member of the selected approval group can approve a request from this Requestor.

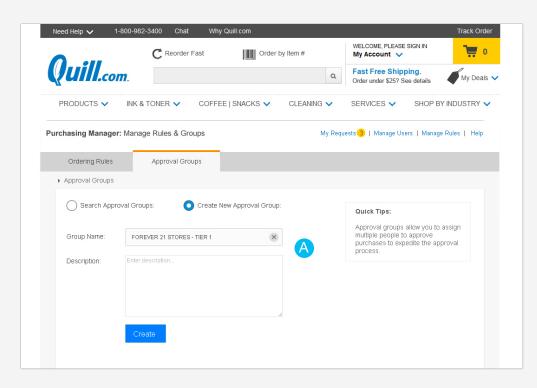
Confirmation of Change to User's Rules



A After you create or edit a user's ordering rules, you will see this confirmation window. A green check mark means there was a recent change to that information.

If you close this window, you can always view this User Information by clicking on the blue user name.

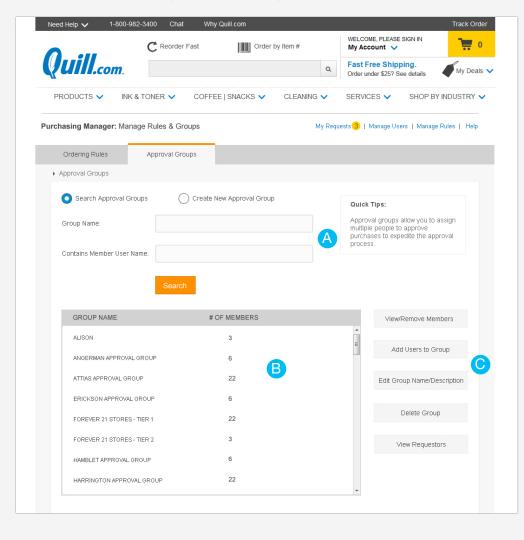
Creating an Approval Group



A With the option of 'Create New Approval Group' selected, you may create an approval group by any name and with any description you'd like.

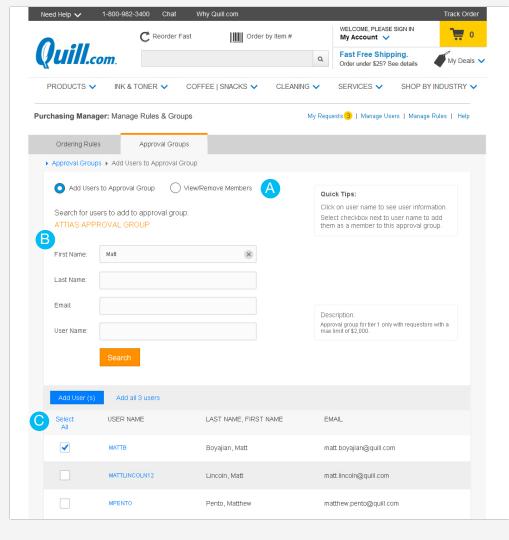
Click 'Create' and then create more groups or manage group members.

Search for an Approval Group



- A Search for an approval group by Group Name or User Name, then click 'Search'.
- B Once you find the Approval Group you are looking for, select it from this area and chose from the options to the right.
- Options on selected Approval Group are:
 - 1. View/Remove Members of an Existing Approval Group
 - Add Existing Users to an Approval Group
 - 3. Edit the Approval Group Name and/or Description
 - 4. Delete the Approval Group
 - View the Requestors that are assigned to the selected Approval Group.

Add to, View or Remove Existing Users from Approval Group



Ordering Rules Approval Groups ▶ Approval Groups → View/Remove Members Add Users to Approval Group View/Remove Members Quick Tips: Click on user name to see user information. Search for group members in approval group: Select checkbox next to member user name to remove them from this approval group. Matt First Name: Last Name Approval group for tier 1 only with requestors with a max limit of \$2,000. User Name Remove all 3 members Select LAST NAME, FIRST NAME USER NAME EMAIL JAMESHALL Hall, James jhall@quill.com LINCOLN67 Lincoln, Matt mlincoln@auill.com MSUPER Super, Matt msuper@quill.com

- A Select to add existing users to the selected Approval Group or view or remove Approval Group members.
- B When you first arrive at this page, all users associated with your account number will appear below. This search feature acts as a way to filter through the users.

Search from users that are already in your Purchasing Manager account but are not assigned to this particular Approval Group.

- Select as many users you would like to add to this Approval Group and click 'Add User(s)'.
- D Similar to adding existing Purchasing Manager users to an Approval Group, from this screen you may remove as many members from this Approval Group and click 'Remove Member(s)'.