Welcome to SunRISE Training

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Customize Profiles
Catalog Searching
Submitting Carts
Approving Carts
Rejecting Items
SECTION ONE

SunRISE Guidebook

Personalize your Profile
Shop in Hosted & Punch-out Catalogs
Submit your Cart for Approval

Quick Guides

Shop, Code & Submit Non-Chemical Quick Guide
Shop, Code & Submit Radiochemicals Quick Guide
Shop, Code & Submit Chemicals Quick Guide
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Accessing the Application

User Registration and Login

Administrative Setup and Notification – Users are to complete and fax (5-2234) the Request for SunRISE Access Form found on www.asu.edu/sunrise. Users will be set up by a SunRISE administrator, and notified when their access has been validated. Once the user receives this notice they can then login to the application.

ASU has a single sign on - using your ASURite ID and Password. To login go to www.asu.edu/sunrise click on the Login tab. Enter your ASURite ID and PW on the Single Sign-On Screen.

**Note: If you are accessing SunRISE wirelessly you must first STOP your VPN SecuRemote. Once into the SunRISE system your VPN may be reconnected.
Navigation Details

Site Navigation

The tabs, screens, and ordering of information is based on what parts of the system each user has access to, along with their personal preferences of presentation. There are a few key things to understand about site navigation and availability of system functionality:

- The navigation tabs that show up across the top of your screen are dependent on 1) your role, and 2) your permissions.

- SunRISE allows users to customize the order of navigation tabs on their screen so that they can access frequently-used sections of the system quickly. For example, someone who frequently reviews purchase requisitions may want the approvals tab to show up first instead of the default home tab.

Navigation Details...

The graphic below shows various facets of the SunRISE navigation. Read the descriptions following the graphic for more information about each of the navigational components:
1. **User Information.** In the upper left-hand corner of the application, information about the user is displayed within a boxed area. In this box is the user’s name, a link to the user’s profile and the logout link.

2. **Screen Title.** In the application header, just below the user information box, the title of the current screen displays.

3. **Cart Summary.** The upper right corner displays a summary of the shopping cart. Included is the cart name (by default, this is your user name, the date, and sequential order # for the day), the number of items in the cart, and the total cart amount. Click this shortcut to go directly to the cart page where the cart details can be reviewed and updated.

4. **Quick Search.** This feature allows a variety of searches to be executed from anywhere in the application. To use this feature, a search option must be selected and search criteria must be keyed in. Clicking the Go button executes the quick search and displays the results in the appropriate search results screen.

5. **Navigation tabs.** Across the top of the application are navigation tabs. By clicking on a tab, the information in the screen refreshes to display the topic or function covered in that particular part of the application. The number of tabs available is dependent on your permissions.
   a. **Home**– provides access to the desktop home screen. From the desktop home screen, searches can be performed, the SunRISE News message is displayed, and purchasing information can be reviewed. The last sub-tab selected is remembered and displayed the next time the home navigation tab is selected.
   b. **Favorites**– is used to create and define company and personal favorites folders and items. Items can be moved and copied between folders; current folders and items can be edited and removed. Note: Favorite items can be also be added through search results and the checkout screens.
   c. **Product Search**– contains the same four tabbed screens shown on the home > desktop page, which allow detailed product searches, quick searches in the case where the product SKU is known, and ordering of favorite items. In addition, this screen allows searches from specific verticals and access to punchout suppliers.
   d. **Carts**– is used to view and modify the current shopping cart, create new carts and delete existing carts, and prepare the cart for processing (adding shipping info, populating custom fields, etc.).
   e. **History**-contains a repository of various documents within the application. Purchase requisitions, purchase orders, receipts, and fulfillment orders are all available for viewing, depending on the permissions granted.
   f. **Settlement**-ASU does not use this tab.
   g. **Profile**– is used to review and update personal user information ranging from time zone, assigned roles, approver information, email preferences, and more.

6. **More>> Navigation Menu.** For users that have access to more than seven navigation tabs, an eighth tab or menu is displayed on the far right side of the screen. This tab contains a drop down list which displays the text more>>. Expanding the drop down list reveals the remaining navigation menus available. Upon selecting the desired navigation menu, the screen below Refreshes to display the specific topic or function covered in that particular part of the application, just as if any of the static navigation menus had been selected.
7. **Navigation Sub-tabs.** Beneath the top-level navigation are sub-tabs. As with navigation tabs, the sub-tabs displayed depend on the permissions granted to the individual user. By clicking on these sub-tabs, the information in the screen below refreshes to display the specific topic or function covered in that particular part of the application.

8. **Search Options.** Although a number of the Desktop screens contain sub-tabs, this screen is most important because it is used for product searches. To access a specific function, click on the tab at the top of the box. The active tab is highlighted. From the Search tabs, a wide variety of functions are available, including the ability to execute detailed product searches and quick searches. This screen also allows searching using specific verticals, access to Punch-out suppliers and ordering on non-catalog forms.

9. **Online Help.** Online Help is accessed by clicking on the question mark anywhere in the application.

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**Users and Roles**

A user is any person who has access to the SunRISE application ([www.asu.edu/sunrise](http://www.asu.edu/sunrise)). Each user signs into the system using their ASURite username and password to identify them. This identification will indicate what their permissions they have, and other user-specific information such as ship-to addresses, custom field values, and more. Users are assigned a specific role(s) which will determine what is available to them within the system.

**Roles and Descriptions**

**Requestors** (Shoppers) are individuals who shop for items and submit a requisition - another individual (coder or approver) will complete the ship to information and required accounting fields for submission and processing. Shoppers simply add items to their cart, but are not required to enter detailed information about the requisition.

**Requestors Coders** are individuals who shop for items and complete the required information – such as ship to information, required accounting fields, etc before submitting the requisition for approval.

**Agency/Org Approvers** are individuals who shop for items, complete the required information – such as ship to information, required accounting fields, etc and approve the requisition. Agency/Org Approvers must be signers in Advantage for the account used on the SunRISE order. It is however, highly recommended, that if you shop and submit the order you have someone else approve the order to maintain separation of duties. If this is not possible, backup from the original person requesting the order should be retained and attached to a copy of the order for audit purposes.

**Research Assistants** are individuals who maintain chemical inventory & containers within the department lab - they can also shop for items as a Requestor.

**Chemical/Lab Managers** are individuals who assist the Research Assistant – has same shopping rights as Requestor.
Updating/Modifying Your Profile

1. **Access your profile.** This can be accomplished a few different ways:
   a. The first time that a user logs into the system, the **My Profile** displays (shown below).
   b. … or… Click on the **profile** link at the top of the screen (to the right of the username).
   c. … or… Select the **profile** navigation tab.

   Once the profile is accessed, the **User Settings → User Identification** sub-tab displays.

   ![Profile Access](image)

2. **Tips for working within your profile:**
   a. To open any of the profile screens, select the top-level tab and then the desired sub-tab. Once a screen is displayed, it is in "edit" mode for those with the appropriate permissions.
   b. If any of the information is incorrect and the screens are read-only, contact your system administrator.
   c. If the screen is editable, additions or modifications may be done directly within that screen of the profile.

3. **Review and update your profile.** Some of the tasks that can be performed is listed below:
   a. Update Basic Profile Information
   b. Update Personal Settings
   c. Review Roles and Permissions
   d. Set up Agency/Org(s)
   e. Update “Ship To” Address
   f. Determine Email Preferences
   g. Review User Profile History
   h. Set up Credit Card Information
4. After updating the profile, click the **Save** button to save the changes. Note: The Save button must be selected on each screen for changes to be saved. Navigating to another screen without clicking the Save button will lose any changes made on the previous screen.

**Updating Basic Profile Information**

Basic user information, such as first name, last name, and contact information are updated through the User Profile. The information on the **User Identification** tab is editable with the exception of the username and the Department Name. This cannot be changed or modified. If a new username is needed, a new user will have to be created and the old user record can be inactivated if no longer needed.

**Step by Step - Updating the information in the User Identification section**

1. **Login** to the system.
2. Navigate to the **Profile Screen**.
3. From the **User Settings → User Identification** sub-tab (which opens up automatically), modify any of the available information. First Name, Last Name, Phone Number and Email Address.
4. Click the **Save** button to save any changes made.

**Step by Step - Updating Personal Settings**

The Personal Settings profile screen is used to determine the time zone, default color theme,. By modifying this information in **your** profile, you are simply changing **your particular settings**.

1. **Login** to the system.
2. Navigate to the profile screen.
3. Select the **User Settings** tab, then select the **Personal Settings** sub-tab.
4. Review the current settings. To make changes to this information, edit the desired fields and click **Save**. Each of the configuration options is described below:
   
   a. **Time Zone**: This field allows users to change their own personal time zone stamp. Time is tracked for each transaction logged in the system such as purchases made, approvals, and more.
   
   b. **Color Theme**: This field permits a user to override the default **Color Theme**. The pre-defined color themes manage font, border, background and highlighting colors.

5. Click the **Save** button to save changes made.

**Financial Approval Information**

The workflow process in SunRISE is used to manage the purchasing approval process.

Financial approvals allow SunRISE to trigger approvals based on a user’s Advantage role as a signer on certain Agency/Orgs. A user’s Agency/Org Approver is typically the first person to review and approve/reject the requisition.

**Addresses in your Profile**

Shipping information is required to place an order in SunRISE. Although address information can be entered each time an order is placed, it is recommended to set-up shipping information in your profile to save time and provide consistency.

There are two types of addresses that are required on purchase orders:

   **Ship To**: The shipping address identifies where the supplier should ship the item(s).
Bill To: The billing address identifies where the supplier should send the invoice for the item(s). (This address is set in your profile depending on which campus you reside.)

SunRISE Administrators have set up addresses in your profile according to your Request for SunRISE Access Form, if you feel these addresses need to modified please contact the SunRISE helpline 727- (RISE) 7473.

**Determining Email Preferences**

The Email Preferences screen is used to determine when and why the user will receive email notifications from the system. This information is NOT inherited from the role, so this must be set up on a per-user basis. Although notification can be enabled for each step in the process (submittal, review, approval, etc.), it is suggested that notifications be sent minimally when problems arise, such as line item rejection.

**Step by Step - Enable email notification for a user.**

1. Navigate to the profile screen.
2. Select the User Settings tab, and then select the Email Preferences sub-tab. The notification options listed are dependent on a user’s permissions.
3. Determine in which cases you would like to receive an email. It is recommended to enable email.
4. Press the Save button to save changes. Emails will be sent immediately (as appropriate).

**Review User Profile History**

The User Profile History provides an audit trail that tracks changes made to a user’s profile. This is an information-only screen that provides detailed information about potentially important changes such as changes to roles and permissions, approvers, addresses, and more. The History screen is used to track changes, additions, and deletions.

**Setting up Credit Card Information**

Credit cards are a possible payment method in SunRISE. From the Payment Options/Ship To Addresses section of the profile, you can set up credit card information so that it does not have to be entered for each order. The credit card number entered is encrypted, meaning it cannot be viewed after entered, but the system retains the information and can validate against the number. Information regarding credit card setup:

- Multiple Credit Cards can be set up. For each card set up, a card nickname, the cardholder name, the number, and the expiration date must all be entered. The three-digit code on the back of the card may also be required.
- By selecting a card as the default, all lines of an order will be assigned to the default credit card. If a default is not selected, each line item must be assigned a credit card individually on each line in the shopping cart.

**Note: Credit Cards can only be used with items from those suppliers that have P-Card set up as an ordering method.**

**Step by Step - Set up one or more credit card numbers for P-Card payment.**

1. Select the Purchasing Options/Ship To Addresses tab, then select the P-Card Information sub-tab. Any card numbers that have been set up display on the left side of the screen.
2. Click the Add a Card button to add a new credit card to your profile.
3. Enter the information for the credit card. If the card number is not valid, you will be notified (as shown in the screen print below).
4. Description of the fields on the screen:
   a. **Nickname** – This is an arbitrary name that identifies the card. For example, if you are someone that orders for multiple people you may have one called “Jim’s Card” and another called “Beth’s Card or ABC1234 for the Agency/Org”. When selecting a credit card for use with a purchase order, you select from the nickname’s assigned.
   b. **Cardholder Name** – This is the exact name that displays on the credit card. This is important that it matches the actual card because the supplier will use this for card validation.
   c. **Card Number** – The number on the card. This number will be initially validated by SunRISE and final verification by the supplier.
   d. **Card Security Code** – The Card Security Code (CSC) is the 3 or 4 digit number on a credit card that is meant to enhance the security of the card number (located on the signature line on the back of the card). This number is not part of the card number itself and is only printed on the physical credit card. The purpose is to ensure that the person attempting to use the card has physical possession of the card as well. The Card Security Code may be required as part of the supplier’s configuration.
   e. **Expiration Date** – The month and year that the card expires. The expiration date must be past the current date in order to use the card.
   f. **Default** – This checkbox is used to identify the default card for the user. Only one credit card can be marked as the default.

5. Click **Save** to save the credit card information. After saving your information, it will look similar to the example below.

6. Check the **Default** checkbox to enable the default card.
Searching for Items

Search Methods
There are various ways in which you can search for items in SunRISE. Together, these search methods provide flexible, easy-to-use ways to find products to add to the Shopping Cart for purchase.

Searching and Shopping Techniques
SunRISE provides several methods to find the appropriate items for requisitioning. In the screen shot below, a few of these methods are shown.

Depending on the information known about the required product or service, one or more of the following shopping methods can be used to search for the product or service:

- **Hosted Search** – a simple search similar to a “Google” search, where a word, phrase or keywords are entered into a single textbox for searching. This is shown in the example above (Enter search terms…)
- **Chemical Resource** – commercially available chemical products are found using chemical structures and sub-structures drawn by the user.
- **Favorites** – store frequently ordered and preferred items in an organized personal manner for fast retrieval and requisitioning.
- **Product Comparison** – view side-by-side comparison of similar hosted catalog items to
compare item details to make a more informed decision.

- **Non-Catalog Forms** - order chemicals that are not available from either a Hosted catalog or Punchout supplier.

**Non-Catalog Forms**

Non-Catalog forms are ASU created forms. There are two different forms which route to Lab Stores for ordering chemicals not available through SunRISE. One form for normal ordering which follows the current approval workflow after Lab Stores has approved it and one for a chemical that is needed on an emergency basis which the Agency/Org approver will be notified after the order has been placed. A justification is required for the all emergency Non-Catalog form orders.

**Punchout and Hosted Catalogs**

A catalog is a supplier’s product offering. There are two types of catalog “Hosted” and “Punchout”. These are described below.

- **Hosted Catalog** – In simplest terms, a hosted catalog is an online version of a supplier’s printed catalog. Hosted catalogs contain product data and details, along with pricing information for each item. When a product search is performed in SunRISE, the products in all of the hosted catalogs are searched. Hosted catalog search results contain product information from all suppliers depending on the search criteria entered by the user.

- **Punchout Catalogs** – Punchout catalogs are integrated external links to a supplier’s web-based catalog. The user selects the Punchout Icon to enter into the supplier’s web-based catalog to search and select products, then automatically returns the items to the SunRISE shopping cart. The selected items are then submitted through the standard requisition/order process.

**Search Results for Hosted Catalogs & ASU Lab Stores**

Search results display when performing standard and advance searches, browsing by supplier or browsing by category. Regardless of how the search results are found, the layout and fields available in the search results are the same.

**What are Search Results?**

The screen print below provides a sample of search results for a “beaker” that displays after search criteria is entered. This screen will show: #1 - Name of the item searched, #2 – Results per page that you have selected, #3 – Products found for this search, #4 – Number of pages in this search, and #5 – Camera Icon indicates you can see a picture of this item by clicking on the icon.
The Order of Search Results

A common question is what determines the order in which products are returned in search results? There are numerous factors that dictate the order in which products are returned within Search Results. The search engine determines the initial sort. Supplier and Category preferences, if used, determine the final listing. More details below:

How the search engine affects the results listing...

The terms entered into the search interface are used to determine the most relevant products, i.e., the product most likely desired based on the information entered. Searches are performed on hosted products in the vertical selected. By default, the "All" vertical is selected, representing all item types. Depending on the search data entry field used, different rules are applied. These rules are described below.

- **must include the words** – Only products containing all the words entered are considered for search results
- **include any of the words** – Products containing any of the words entered are considered for search results
- **include exact phrase** – Only products containing the words entered in the exact order entered are considered for search results
- **exclude the words** – Any product containing the words entered are eliminated from consideration in search results
- **other fields** – Search tokens entered in the other available fields, e.g., Supplier Name are treated in one of two manners. If they are the only field populated, they are treated like the must include the words field. If other fields are populated for search, the tokens entered are treated like the include any of the words field.

Based on the rules listed above, the search engine finds all the products that should be considered for search results. Products with the greatest number of matching words are ranked higher than those with fewer. For example, if four words were entered in to the include any of the words field, the product containing all four are ranked higher than those containing three.

Search Results Details and “How To’s”

Search Results display at the lower portion of the screen. Below are some detailed explanations for the Search Results user interface:
Product Sorting. By default, the products presented are listed in the order described above (The Order of Search Results). In addition, products can be sorted by any column containing the icon below the column name. Select icon again to reverse the sort.

Icon Definitions. Both products descriptions and supplier names may have icons next to them. The Legend link at the top and bottom of the Search Results launches a pop-up that explains each of the icons. Additionally, mouse-over text is available for icons to view their description.

Adding Items to Your Cart. To add an item listed in Search Results to the shopping cart, enter the Quantity, and then click the button. To add multiple items to the cart, select the checkbox next to each item in the Select column, choose the option in the drop-down action menu (default), then click the button.

Adding Items to your Favorites. You can also add items from your search results to your favorites.

Comparing Items in Search Results. From the search results, product details can be compared to determine which one should be ordered. Select the check box next to the products to be compared, choose the option in the action pull-down, and click the button. For more information, refer to Using the Comparison Function.

**Note:** Additional actions may be available in the pull-down depending on your assigned permissions.

Access Additional Pages. To page through search results, use the arrow buttons or page entry field to go to a specific page of search results. This information is displayed above and below the search.

Searching by Supplier

The Browse by Supplier functionality is much like using a table of contents from a paper catalog. Once the desired chapter is found (category of products in this case), a single click takes the user to all the products provided by that supplier in that selected category.

**Step by Step** - Find the desired products for a specific supplier using the Browse by Supplier search.

1. Open **Product Search**.
2. Select the **Browse By Supplier** link found under **Other Searches** on the left side of the screen. The Browse by Supplier search window displays.
3. Search and locate the supplier whose products you would like to review.
4. To view all suppliers, click the **Search** button.
   a. To search by supplier name, use the **Supplier / Catalog Name** field. Only the first few letters of the supplier’s name are required.
   b. From the **Show Types** drop down, select **Hosted Catalog Suppliers**.
   c. Click the **Search** button to see the results for the supplier being located.
   d. From the list of suppliers, select the desired supplier by clicking the appropriate link in the **Supplier Name** column. The Supplier details and category listing will display.
4. From the supplier category page, select the desired product category by clicking on its name or the + next to its name. Continue drilling down into the categories (expanding/collapsing) until you
locate the sub-category that you would like to view.

5 Final sub-categories (with items) are indicated with the word “view” next to it. Click the view button to view the items for the supplier in that particular category. You will be taken to the Search Results page.

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**Searching by Category**

The Browse by Category functionality is similar to the Browse by Supplier functionality. The main difference is instead of viewing one supplier’s table of contents; all supplier tables of contents are shown. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section – beakers for example.

Browse by Category provides a quick way to locate all items – across all suppliers – in a certain category.

As with the Browse by Supplier functionality, once the desired chapter is found (category of products in this case), a single click takes the user to all the products provided by all suppliers in that selected category.

**Step by Step - Find the desired products using the Browse by Category search**

1 Open **Product Search**.
2 Select the **Browse By Category** link found under **Other Searches** on the left side of the screen. The Browse By Category screen displays.
3 A full list of available categories, across all hosted catalogs is presented. This is your full table of contents. Drill-down to the category of your choice using the + and – functions, which allow you to expand and collapse categories.
4 Final sub-categories (with items) are indicated with the word “view” next to it. Click the view button to view the items in that particular category. You will be taken to the Search Results page.
5 The Search Results page displays all of the items in the category selected for all suppliers. You may want to use the product comparison functionality for further product/supplier comparison.

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**Searching with Punchout Suppliers**

In addition to searching supplier-hosted catalogs that are loaded in to the SunRISE database, searching for items via Punchout suppliers can be performed. Punchout vendor sites are very useful in finding products that require some configuration like computers, oligonucleotides (DNA/RNA), etc.

When accessing a Punchout supplier via SunRISE, the user is automatically authenticated to the supplier, so the supplier’s website knows which organization the user is from to show the appropriate products and pricing.

For configurable items, e.g., computers and oligonucleotides (DNA/RNA), Punchout catalogs are the
preferred method for finding/configuring products. Product configuration sites like Dell and Invitrogen (DNA/RNA) are examples of when a Punchout is preferred / required versus using a hosted catalog.

Punchout vendors are shown with icons (typically company logos) at the bottom of the search interface for each vertical.

**IMPORTANT**: The interface and usability of Punchout shopping varies between suppliers.

**Step by Step** - Use a Punchout site to find the desired product.

1. Open **Product Search**.
2. Click the **Punchout Icon...** link to access the supplier Punchout site.
3. Once the Punchout is selected, the browser is redirected to the supplier’s website. The supplier’s website is framed within the SunRISE browser window.
4. If you need to cancel the Punchout, select the button at the top of the screen.
5. Once in the Punchout site, use the appropriate search tools to find the desired products. Once all products are found, **check out** of the Punchout site per the supplier’s instructions. The products in the Punchout shopping cart are returned to the SunRISE shopping cart.
   
   **TIP**: An order is NOT being placed with the supplier when checking out of their Punchout site. The purchasing process continues once returned to SunRISE.
6. Additional products can be added to the SunRISE shopping cart from other Punchout suppliers as well as hosted catalog suppliers.

[Image of Punchout Vendor Icons]

**Using Chemical Resource**

Chemical Resource is a tool geared specifically to chemists. This searching tool allows chemists to search for commercially available products by drawing structures and sub-structures. Additional parameters can be included to refine search results including molecular weight and molecular formula.

The **ChemDraw plugin is required** to use the Chemical Resource tool. This may require approval from your IT department. The plugin is accessible from the Chemical Resource interface.
Step by Step - Access the Chemical Resource tool and find commercially available products by drawing chemical structures and sub-structures.

1. Open Product Search.
2. Select the Chemicals link found under Other Searches on the left side of the screen. **Note:** This link is only available to users with the appropriate permission. The Chemical Resource tool is opened in a new browser window.
3. If the Cambridge soft plugin has not been loaded, only textual searches can be performed, e.g., CAS#, molecular weight, molecular formula, etc.
4. If the plugin is not loaded, a message appears on the screen to load it. Select the link if structure searching is desired.
5. Follow the on-screen directions to load the plugin. This will likely take several minutes to download and load.
6. Follow the instructions include on the Chemical Resource to find the desired compounds.

7. Once a compound of interest is identified, select the button to see which commercially available products are available in the hosted catalog.

8. Search Results within SunRISE are presented based on the suppliers enabled in the SunRISE system.

**Shopping Carts and Checkout**

**Shopping Cart Functionality**

**Shopping Carts**

Shopping Carts represent items selected for purchase from the end user. Shopping carts contain line items that represent items or goods being requested through SunRISE. The shopping cart process varies for each user due to the different SunRISE roles. Listed below are some details related to shopping carts:

1. Users who need to **Shop-only (Requestor Role)** have permissions to add items to a cart, and then submit the cart for coding and final approval. (this role will have the Ship To, Agency/Org, Object and Sub-object codes defaulted) into their profile
2. Users with the **Shopping and Coding roles (Requestor Coder Role)** are used to identify individuals who shop, code and submit carts. In order to submit a cart for final approval, you must populate all required fields, such as Agency/Org, Object, Sub-Object, shipping and more.
3. Once the shopping cart has been submitted for approval it will be routed electronically to the assigned Agency/Org Approver depending on the account being used.

**Adding Items to the Cart**

The Cart button in the upper right corner updates reflecting the total quantity and cost of items in the cart:
Step by Step - adding products to a cart. This section is broken down by task.

Task 1: Add items from the Product Search Results page.

1. Search for products using any of the search tools. Search Results display at the bottom of the screen.
2. To add a single item to the cart, set the desired quantity and click the Add to Cart button.
3. To add more than one item to your cart:
   a. Set the desired quantity for each item or leave the default quantity of 1.
   b. Enable the checkbox for each item under the Select column.
   c. Select Add to Current Cart from the drop-down list box above or below the search results (as shown below), then click Go.

Task 2: Add items from the Product Description popup

1. Search for products using any of the search tools. Search Results display at the bottom of the screen.
2. Click on an item’s Product Description to open its Product Details popup.
3. Set the desired quantity and click the Add to Cart button.

Task 3: Add items from a Punchout Catalog

1. The Home page defaults to the last tab the user visited. Select the Product Searches tab and select an active Punchout.
2. The application redirects to the supplier’s Punchout site.
3. Search for products and add products to the cart in the supplier’s punchout (this process varies from punchout to punchout).
4. Use the supplier’s mechanism to return products to SunRISE (this process again varies from punchout to punchout).
5. Upon returning to SunRISE the user will be on the cart page.

Removing Items from the Cart

Items can be removed from shopping carts either individually or all at once. Items are typically removed when it is determined that another product is needed instead, the item does not fit (due to cost, quantity, etc), or accidental selection.

SunRISE allows the removal of items from the cart, regardless if the item is from a punchout item or hosted catalog item.

Step by Step - show how one or more items can be removed from a shopping cart.

Task 1: Remove selected items from a cart

1. Go to a shopping cart with items in it.
2. In the cart select one or more items to remove:
3. Place a check in the Select checkbox in the row for each item to removed
4. Choose Remove Selected Items in the available actions list box (above the items in the
cart), and click Go.

The system removes the selected items and updates the Cart button totals in the upper right corner of the screen.

**Task 2: Remove all items from a cart**

1. Go to a shopping cart with items in it.
2. Choose Remove All Items in the Action Dropdown list (above the items in the cart)—it is not necessary to select any checkboxes.
3. Press Go.
4. A confirmation popup opens. Choose OK to remove all items or Cancel to stop.
5. The system removes all items and updates the Cart button totals in the upper right corner of the screen.

**Updating Items in the Cart**

Once products have been added to the shopping cart, it may be necessary to change some of the product information, such as quantity. There are different procedures for updating items selected from a hosted catalog to those from a punchout catalog. This section discusses the update options that are available.

**Step by Step** - demonstrates the available functionality around updating items in your cart. This section is broken down by task.

**Task 1: Update the Quantity of a Hosted Catalog Item**

1. Go to a shopping cart with a hosted catalog item in it.
2. In the Qty/UOM field of the row for the product to modify enter the desired quantity.
3. Click the Save Updates button at the bottom of the page.

The TOTAL at the bottom of the page and the Cart button in the upper right corner of the application both update with the revised amounts.

**Task 2: Change a Punchout Catalog Line Item**

1. Go to the shopping cart with the punchout catalog item to be changed.
2. From the Edit Cart button - click the check box on the right hand side of the line item. From the pull down menu select Remove Selected Items and click GO.
3. To select a different item or reorder this item with your change in quantity etc, go back into the punchout catalog to search for the item as previously done.

The TOTAL at the bottom of the page and the Cart button in the upper right corner of the application both update with the revised amounts.

**Task 3: Update Non Catalog Line Items**

1. Go to the shopping cart with the Non-Catalog item
2. Click on the product description name to get back to the form to make changes or click on the “more info…” link to the right of the product description.
3. Make needed changes on the form, Save and Click GO, then Close to return to your cart.
Checking Out

After completing all shopping, the checkout process begins. The complexity and steps involved in checking out varies depending on your SunRISE Role.

**Submitting a Requisition: The Checkout Process**

SunRISE allows users to submit their orders. By submitting a requisition, the order will begin the approval process.

The checkout process is accomplished through the carts navigation tab. From the current cart sub-tab, you can see the following buttons on the screen. These buttons represent the activities required to complete and process an order. Depending on your SunRISE role, some of these buttons may not be visible.

- **Add Products** allows further shopping in the application.
- **Edit Cart** provides a high-level look at the items in the requisition and header information such as user name, and header-level internal and external attachments. Remove or edit line items from this screen (by entering a Cart Name for each order a search can be done at any time to determine spend per the Cart Name – ex: Project Name, Prof. Name, Grant number, etc).
- **Review** provides a detailed look at each line item, including where it should be shipped, Agency/Org, Object and Sub-Object for each line item, and more.
- **PR Approvals** provides a read-only workflow diagram detailing the process the requisition must go through to be sent to the supplier.
- **PO Preview** provides a read-only preview of each PO to be generated from this requisition.
- **Submit** is the button used to begin the checkout process. This means starting the approval process. Note: Checkout will not occur until all system errors are corrected.

**Reviewing the Requisition**

SunRISE allows users (other than those with the role of Requestor) to review their requisition before submitting to the workflow process by submitting a requisition, the order will begin the approval process through workflow.

Reviewing sub-tabs are listed below:
Step by Step - review and complete the fields at the header level for a requisition before submitting the order.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
2. The initial screen presented is the **Edit Cart**.
3. Click the **Review** button across the top of the window

   a. **Cart Name** - Allows user to add a name for this order – this is a searchable field.
   b. **Prepared For** - Allows user to prepare the requisition for another user.
   c. **Internal Note** - Allows user to add a detailed note to the requisition that is available to approvers as the requisition goes through workflow. Such note is **not sent** on to suppliers.
   d. **Attachments** - Allows user to attach files in various formats or links to websites. These are available to approvers as the requisition goes through workflow. Such attachments **are not sent** on to suppliers.
   e. **Accounting Codes** - Allows user to associate an Agency/Org, Object and Sub-Object with the requisition.
   f. **Incomplete information** will always appear framed in a **yellow box** – to correct click on the edit box in the upper right corner of each section.

Click the **Save** button to save the header information. Continue to the next section to update line item details.

**Populating Line Item Details**

In a requisition, various details such as Ship To address, accounting code etc. can be associated with each line item. SunRISE uses values set up in profile section. Users can modify the values – per line item – as needed. This ability allows the user to ensure that each line item in the requisition has appropriate information associated with it.
Depending on the user’s role & permissions, access to line item details and custom fields vary.

**Step by Step** - review and complete the fields at the line level in a requisition before submitting the order.

1. After reviewing information at the header level (previous section), click the **Review** button across the top of the window.
   
   a. Modify appropriate data fields as needed. Depending on the field being edited, a list of values may be selected, a freeform value entered, or checkbox / radio button.
   
   b. To edit specific information for the requisition, use the tabs across the top of the cart screen as shown below (Shipping, Credit Card Information, Accounting Codes etc):
   
   c. Scroll down to make changes to specific line items.

2. Tips on making changes at the line level:
   
   a. Whenever possible, set up the information about the requisition at the header level and work by exception at the line level. For example, if you are using the same accounting code for 6 out of 10 of the line items, we recommend you enter the “primary” code, and then change the remaining 4.
   
   b. Below is a list of common “sections” on a cart, along with a description of each:
      
      • **Shipping** - This section displays the address to which the item will be shipped by the supplier.
      
      • **PO Number** - This section displays any specific PO Number to be used. If this field is blank, the application assigns PO Number as per rules set up in admin section.
      
      • **Credit Card Information** - This section displays any credit card information to which the line item is being charged.
      
      • **Supplier Info** - This section displays information concerning the supplier – address, technical contact, catalog information and last content update.
      
      • **Codes or Accounting Codes** - This section displays various codes used by ASU so that the purchase is billed to Agency/Org.
      
      • **Internal Info** - This section displays any internal note attached by the user.

   c. When making edits to a section of the cart at the line level, you must scroll to the appropriate line and section, then click the **edit** link in the upper right corner of each section.
   
   d. **Line level notes**: After creating line level notes – you can copy this information to additional lines by selecting the **copy to other lines** link.
   
   e. After populating custom fields for a line, you can copy this information to additional lines by selecting the **copy to other lines** link.
   
   f. When modifications are made at the line level, the system will indicate this by displaying the unique information. Otherwise, you will see the (same as header) text.
**Reviewing the Workflow Process**

SunRISE provides a visual representation of the workflow or approval process for a purchase requisition. Each step in the process is represented by a box, along with a description of the process or step.

**Step by Step** - review the workflow process of the requisition

Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).

1. Complete all required information for the shopping cart.
2. Click on **PR Approvals** after all the required values are populated. This allows review of the requisition approval process.
3. Review the workflow process.

**Submitting the Shopping Cart for Workflow Approvals**

Users can submit a shopping cart to complete a requisition. The application validates the shopping cart for proper completion of cart details and, if necessary, prompts the user to correct/edit appropriate details.

**Step by Step** - completes the shopping process by submitting a cart.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart.
2. After reviewing and updating the order, click on the Submit button in the shopping cart. If the order has any errors with associated details, the Review page is displayed with an error message in red font with a yellow border. A specific error message is also displayed next to specific fields for each affected line item. The user can edit the values as needed (as described under the Populating Line Item Details section) and click on Submit again to submit the order.
3. Once the requisition has been submitted it will follow the appropriate workflow process depending on the Agency/Org used and items ordered (example: if any radioactive items are ordered the workflow will include the Radiation Safety Office)
Shop, Code & Submit - Non-Chemical Quick Guide

1. Login to SunRISE
   www.asu.edu/sunrise Single Sign On - use your ASURite ID and Password

2. Fill shopping cart
   Product Search

3. View cart
   Click on Cart tab or Click on far upper right Cart Summary Link

4. Prepare cart for approval
   Click on Review tab

5. Update Shipping

6. Scroll down to Accounting Codes if codes have not been defaulted
   Click on upper Edit button that is located below the question mark symbol within the Accounting Codes section
   Under Agency Org – click on Select from Profile Values
   Using the drop down menu, highlight and select Agency-Org account
   Under Object – click on Select from Profile Values
   Using the drop down menu, highlight and select Object Code
   Under Sub-Object – click on Select from Profile Values
   Using the drop down menu, highlight and select Sub-Object Code

7. To change Accounting Codes by line
   a. Click on sub-tab Accounting Codes
   b. Click the edit button on the line to be changed
   c. Follow instructions above

8. Click the Save button

9. Scroll to the top of page

10. Click the upper right Submit button

Please call Patty 5-1816 or Pam 5-2430 or Andy 5-3270 if you need assistance.
Shop, Code & Submit Radiochemicals Quick Guide

1. Login to SunRISE
   
   www.asu.edu/sunrise  Single Sign On - use your ASURite ID and Password

2. Fill shopping cart
   
   Product Search

3. View cart
   
   Click on Cart tab or Click on far upper right Cart Summary Link

4. Prepare cart for approval
   
   Click on Review tab

5. Change Shipping Address on any line containing Radioactive Material to Radiation Safety from the drop down menu (REQUIRED)

6. Scroll down to Accounting Codes if codes have not been defaulted
   
   Click on upper Edit button that is located below the question mark symbol within the Accounting Codes section

   Under Agency Org – click on Select from Profile Values

   Using the drop down menu, highlight and select Agency-Org account

   Under Object – click on Select from Profile Values

   Using the drop down menu, highlight and select Object Code

   Under Sub-Object – click on Select from Profile Values highlight and select Sub-Object Code 10 (REQUIRED)

7. Click the Save button

8. Scroll to the top of page

9. Click the upper right Submit button

Please call Patty 5-1816 or Pam 5-2430 or Andy 5-3270 if you need assistance.
Shop, Code & Submit Chemicals Quick Guide

1. Login to SunRISE
   www.asu.edu/sunrise Single Sign On - use your ASURite ID and Password

2. Fill shopping cart
   Product Search

3. View cart
   Click on Cart tab or Click on far upper right Cart Summary Link

4. Prepare cart for approval
   Click on Review tab

5. Change Shipping Address on any line containing Chemicals of any kind to Lab Stores from the drop down menu (REQUIRED)

6. Scroll down to Accounting Codes if codes have not been defaulted
   Click on upper Edit button that is located below the question mark symbol within the Accounting Codes section
   Under Agency Org – click on Select from Profile Values
   Using the drop down menu, highlight and select Agency-Org account
   Under Object – click on Select from Profile Values
   Using the drop down menu, highlight and select Object Code
   Under Sub-Object – click on Select from Profile Values highlight and select Sub-Object Code 06 (REQUIRED)

7. Click the Save button

8. Scroll to the top of page

9. Click the upper right Submit button

Please call Patty 5-1816 or Pam 5-2430 or Andy 5-3270 if you need assistance
SECTION TWO

SunRISE Guidebook

Approve and/or Reject a Document

Quick Guide

Approving/Rejecting Quick Guide
Accessing the Application

User Registration and Login

Administrative Setup and Notification – Users are to complete and fax (5-2234) the Request for Sunrise Access Form found on www.asu.edu/sunrise. Users are then set up by a SunRISE administrator, and notified when their access has been validated. Once the user receives this notice they can then login to the application.

ASU has a single sign on - using your ASURite ID and Password. To login go to www.asu.edu/sunrise click on the Login tab. Enter your ASURite ID and PW on the Single Sign-On Screen.

**Note:** If you are accessing SunRISE wirelessly you must first STOP your VPN SecuRemote. Once into the SunRISE system your VPN may be reconnected.
The Basics

Workflow and Approval Basics

The approval process is a key component of the overall purchasing program. SunRISE provides a flexible and easy-to-use automated approval process that is referred to in the system as workflow.

Workflow is very unique in its rules, structure, and purpose. This lesson is designed to give an overview of its capabilities in SunRISE. A few key points:

- SunRISE users with permissions to review purchase requisitions and/or purchase orders are referred to as Agency/Org Approvers.

PR Approval

The workflow process begins when a cart is submitted in SunRISE and continues through when the purchase order is sent out to the supplier.

The goal of workflow is to make sure that all orders sent out are valid. For example, workflow may involve financial approvals. In other cases, it may verify that the certain types of items (such as radioactive or other hazardous items) are routed to the appropriate approvers.

Key points about workflow:

- SunRISE approvals are handled at the requisition level prior to becoming a PO and there are several different types of workflow approvals.
  - **Agency/Org Approvers** – all requisitions must be approved and these approvers must be signers in the Advantage System, for the accounts be used, in order to approve SunRISE documents.
  - **Radioactive Material Commodity Approvers** – all SunRISE orders containing any Radioactive Materials will be routed to a Radioactive Material Approver. All Radioactive Materials MUST be delivered to the Radiation Safety Office
  - **Commodity Approvers** – certain commodities are set up with special approval requirements. Example: Compressed Gases and Liquids
  - **Department Approvers** – there are a few departments that have requested that all orders be approved by an individual before being sent to the Agency/Org Approver.

- PR workflow must complete before a PO is created.

Sample View of Workflow

The graphic below shows an example of the steps of the workflow for an order. The steps in workflow vary based on the item(s) ordered, and the agency/org being used.

Workflow steps can be viewed in the system by opening a purchase requisition or purchase order and looking at the Approvals tab. Each box represents a step and each step is triggered by some type of activity. The document is fully approved when a date appears.
Key Terms related to Workflow

Below are some definitions related to workflow.

- **Workflow Documents** – This term is used to describe purchase requisitions and/or purchase orders in the approval process.

- **Workflow Folders** – Workflow folders represent a step in the workflow process and may be referred to as workflow queues. When a requisition or workflow arrives at a step, the individual(s) assigned to the workflow folder are notified, through the email. Workflow folders are shared, meaning that more than one user can be assigned as an approver in a step.

- **My Approvals** – The workflow folder that is user-specific is *My PR Approvals*. The contents of this folder vary with each user and indicate that the requisitions in this queue require the specific user’s attention. A user must move a workflow document from a shared folder to their "My PR Approvals" folder before it can be approved or rejected.

Performing Approval Tasks

This section is geared for individuals responsible for approving purchase requisitions and to educate departmental approvers, agency/org approvers, and all other types of approvers on how to review, approve, and reject line items and orders as a whole in SunRISE.

Approval Basics:

- In order to approve requisitions, you must have the appropriate approval permissions. Permissions are granted through role assignment and/or individual permissions being granted by the system administrator.

- Approvers can choose whether or not to receive email notification when an order requiring approval lands in their “queue.” This is set up via the user’s profile.

- An entire requisition can be approved or one or more line items in the requisition can be rejected. If part of a requisition is rejected (one or more line items), the remaining line items continue in the process.

- If a line item or the entire requisition is rejected, the rejection notice will show up in PO History. If the user is set up to receive email notifications for rejections, they will receive an email also.

- Some types of approvals are directed at a single individual and no one else can approve the order (unless a substitute is set up or the order is forwarded). An example of this is for Radioactive Materials approvals.

- Other approval queues can be assigned to multiple approvers, such as the Agency/Org Approver. All SunRISE users who have this role will be in the queue with all other SunRISE users who are signers on the same account in Advantage.

Receiving Workflow Notification

Approvers are notified of requisitions or orders requiring attention in one of two ways:

- The Review Section on the Home Page provides approvers with a summary of the documents available for review in workflow.

- Approvers are notified via email when a document has been routed to their personal folder dependent upon the Agency/Org used in the requisition. This email contains a link that takes the recipient directly into the appropriate approval area. **It is important to remember that multiple people may receive the same email if more than one approver is allowed to approve the same Agency/Org.**

**Note:** Users must have the proper email notifications set up in their profile to receive email notifications for workflow approval.

Step by Step - review approval notifications and requisitions requiring review
1. Refer to the Review section on the left-hand side of the Desktop.

2. Accessible workflow folders are displayed beneath My PR Approvals. My Approvals displays the number of documents currently in the folder (Active) as well as the number of notifications (Pending).

3. The Review section displays the number of documents that are in the folder (Pending) as well as the number of documents that are still awaiting review (Not yet assigned to an approver).

4. Click either My Approvals or a specific folder link in the Review section to view the documents in the workflow folder.

**Moving Requisitions to My Approvals Folder**

When an approval step is shared by more than one person, the document must be placed in your "My Approvals" folder. By placing the pending order in the My Approvals folder, it signifies that you are the approver and you are taking responsibility for the current step of workflow for the item(s).

**Step by Step** - selects and reserves a requisition for approval review. This exercise will move a document to a user's My Approvals folder.

1. Refer to the Review section on the left-hand side of the Desktop.

2. Select the My PR Approvals folder or a specific folder link in the Review section to view the documents in the workflow folder.

3. To move one document to your approval folder you must:
   a. Select a document from an approval folder with a state of Not Assigned. Note: Documents that have been assigned will not have the Assign link available.
   b. Click the Assign link in the Action column to move the document to the My PR Approvals folder. The document is now in the user's personal approvals folder, and the approver's user name is now listed under the Approver column as shown below.

4. To quickly move multiple documents to your approval folder you must:
a. Enable the Select checkbox for the individual items that you would like to assign to your approvals folder OR enable the top Select checkbox to enable ALL available line items. After you have selected which documents to assign to yourself, select the Assign option from the Apply Action drop-down box (as shown below).

5. After you have moved the item(s) to your approvals folder, the next step is to review the requisition for processing. Refer to the next section for further information on reviewing and approving a requisition.

**Reviewing a PR**

An approver should review all the details of a requisition as part of the approval process. The approver can review this information by following the steps described in this section.

**Step by Step - reviewing a purchase requisitions in SunRISE.**

Review a pending Requisition in workflow

1. Reference the Review section on the left-hand side of the Desktop. The approvals screen displays.
2. Select the requisition tab at the top of the window.
3. In most cases, you will approve requisitions from your My Approvals folder at the top of the screen. If the document needing approval is not found in that folder, refer to the previous exercise to move it to this part of the screen.
4. From the My PR Approvals table, select the view... link to the right of the requisition number to access the details of the document.
5. Once you open the document, notice how it looks very similar to a cart that is submitted. The primary difference is that in some cases the data allowed to edit is limited, and the PR workflow has been updated with any previous steps. The next step is to review and edit the document as needed. **The approver must verify for accuracy:**
   a. the Ship To Address (all Chemicals must be shipped to Lab Stores and all Radioactive Materials must be shipped to Radiation Safety)
   b. the Agency/Org
   c. the Object and Sub-Object Codes – dependent on the line item(s) being ordered (ex: 732005 Lab/Medical Supplies, 732006 Chemicals and 732010 Radioactive Materials) – other codes will be used for non-scientific purchases)
   d. any internal notes that may pertain to them as the approver

**Note:** All of the information listed above may be at the header level or at the line level.

6. Click the Save Updates button to save all changes. Refer to the next sections to approve or reject the document or specific line items.
Rejecting a PR or specific line(s) of a PR

To reject a requisition as a whole, you must reject all the line items for the document. SunRISE also allows you to delete select line items from a requisition.

**Step by Step - reject PR lines or the entire document.**

1. Open the requisition (refer to previous section).
2. Select one or more line items to reject by clicking the checkbox to the right of the price. Alternatively, click the checkbox in the column header row for EACH supplier to select all lines (for the particular supplier).
3. Select **Reject Selected Items** action from the drop-down box, and select the **Go** button to reject the line items.
4. Enter a rejection reason in the comment pop-up box.
5. Select the **Reject Line Item** button to save the comment and reject the line item(s). *The rejection is not finalized until the workflow step is complete.*
6. Select **Approve All** from the **Available Actions** drop-down box.
7. Click the **Go** button to complete review of the requisition, which will then move to the next step in workflow, if appropriate.

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Approving a PR

Approve a requisition.

**Step by Step – approving a PR**

1. Open the requisition as described in the Review a PR section
2. Once the requisition has been reviewed and verified for accuracy as described.
3. Click the **Save Updates** button to save all changes.
4. Select **Approve All** from the **Available Actions** drop-down box.
5. Click the **Go** button to complete review of the requisition, which will then move to the next step in workflow, if appropriate.
**Forwarding a PR**

Occasionally, an approver may decide that a different SunRISE user is a more appropriate approver for a particular requisition. Forward is a function provided in the workflow process where a document can be sent to a different approver for review. This section describes how an approver can forward a PR document in workflow to another approver. **NOTE:** The substitute function is recommended if you will be on vacation or do not want to handle orders for a specified time period normally assigned to you.

**Step by Step** - forward a PR to another SunRISE user.

1. Access the Approvals section of the application (via the home page, an email, or the approvals navigation tab).
2. **OPTION 1:** If you know you want to forward a requisition that has not been reviewed (unopened):
   a. Enable the Select checkbox on the far right side of the folder where the document resides.
   b. Select the Forward… option from the drop-down box and click the Go button. Skip to the next step.
3. Enter specific user criteria to find the recipient of the forwarded requisition.
4. Click the Search button.
5. Select the appropriate user using the radio button to the left of the user’s name.
6. Click the Choose Selected User button to continue.
7. Enter a note for the user that describes the reason to forward the requisition.
8. Click the Forward button.

**Assigning a Substitute Approver**

In the event an approver is absent or does not have access to the application, he/she can designate another SunRISE approver as their substitute. The substitute is able to review documents routed to the original approver. Substitutes are assigned at the folder level from the Approvals screen. This section describes how to set up a substitution in workflow.

**Step by Step** - assigns a substitute approver for an approver’s purchase requisitions. Keep in mind, you can choose to use a substitute approver for documents in all folders (shared folders, My Approvals, etc) or a select folder.

1. Access the Approvals section of the application (via the home page, an email, or the approvals navigation tab).
2. Determine which folder(s) that you would like to set up a substitute approver for and follow the directions below for EACH folder:

3. Select the Assign Substitute link in the upper right-hand corner of the My PR Approvals section. Please note that substitutes can be assigned to any folder to which the original user has access. The procedure is the same as shown in this section except that a user selects the Assign Substitute link next to the corresponding folder.

4. Enter specific user criteria to find the recipient of the forwarded requisition.

5. Click the Search button.

6. Select the appropriate user using the radio button to the left of the user’s name.

7. Click the Choose Selected User button to assign that individual as the substitute.

8. Click End Substitution to remove the substitution setting for that folder.
Approval Quick Guide
Approving and/or Rejecting a Requisition Quick Guide

APPREVING a Requisition

1. Login to SunRISE OR click on the link in the e-Mail Notification received
   www.asu.edu/sunrise  Single Sign On - use your ASURite ID and Password

2. Review requisitions requiring approval
   Click My PR Approvals Folder or other Specific Folder

3. Move Requisition to My PR Approvals Folder
   Click the Assign link in the Action column

4. My PR Approvals Folder
   Click the View link to the right of the requisition number

5. Review for approval
   a. Verify “Ship To” Address (remembering all Chemicals must be shipped to Lab
      Stores and all Radioactive Products must be shipped to Radiation Safety)
   b. Review or Add any needed Internal Notes
   c. Verify all accounting codes for accuracy (Lab/Medical Supplies 732005, Chemicals
      723006 and Radioactive Products must be coded to 732010 other codes will be
      used for non-scientific purchases )

6. Click Save Updates

7. Click Approve All button

REJECTING a line or the whole requisition

1. Follow steps 1-4 above

2. Select one or more line items to reject
   a. Click the Checkbox to the right of the line item(s)
   b. Select Reject Selected Items
   c. Add Note
   d. Click Reject Selected Items from the drop down
   e. Click the GO button
   f. Line item(s) will now show the RED X icon to the far left

3. Click Approve All button

Please call Patty 5-1816 or Pam 5-2316 or Andy 5-3270 if you need assistance.