

Below is the procedure for routing carts with attached Equipment Screening Forms to Surplus:

1. Populate a cart with your item(s) of interest (from the Marketplace or as a text item) and attach the completed Equipment Screening Form in the *Details* section.
2. To route the cart to Surplus for review, an 'ad-hoc' approver must be entered into the approval workflow. To add an approver, click *Display/Edit Agents* in the *General Data* region of the cart:

Order Close Print Preview Notify Check Save

▼ General Data

Name of Shopping Cart: CFREEL 02/29/2012 12:10 Approval Note

Default Settings: [Set Values](#)

Team Shopping Cart: ☒ Make accessible to my Purchasing Substitutes

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)

Default Address: 0102416668 - Levine Science Research Center 308 Research Drive , I

▼ Item Overview

Total Val. (Gross) 3,231.41 USD

Details Add Item Copy Paste Duplicate Delete Change ALL

Line Number	Item #	Supplier	Supplier ID	Supplier Cat #	Description	Quantity	UoM
1	1	VWR INTERNATIONAL INC(313)	313	82026-626	VWR MICROSCOPE COMPOND TRINCLR	1	EA
						1.000	

3. In the *Header Approval Status* box, click *Add Approver*, followed by *Add Approver Below Selected Line*. This will require the cart route to the ad-hoc approver after departmental approvals have been completed.

Approval Process Overview

Current Status: Initial Header Approval Note

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Follow Up: ☐ Work Item to Requester at Process End

Header Item

Header Approval Status

Add Approver Remove Approver

Add Approver Above Selected Line

Add Approver Below Selected Line

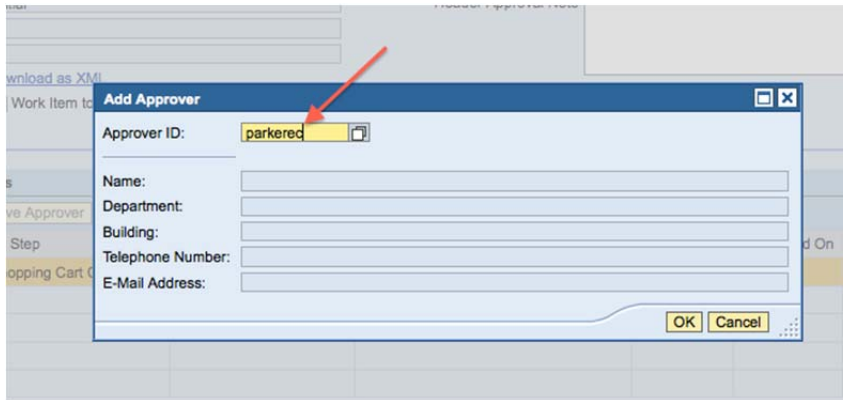
Status	Processor	Received On	Processed On	Forwarded By
Open (No Decision Made)	LLOYD HARDISON, TRACI R MCNEILL			

Reviewer(s) for the Document

Add Reviewer Remove Reviewer

Reviewer Type	Processor	Received On	Processed On	Forwarded By
The table does not contain any data				

4. The contact in Surplus for these orders is Craig Parker. To add Mr. Parker as an ad-hoc approver, his NetID (parkerec) needs to be added to the *Approver ID* field. Click *OK* when finished.



**Add Approver**

Approver ID:

Name:

Department:

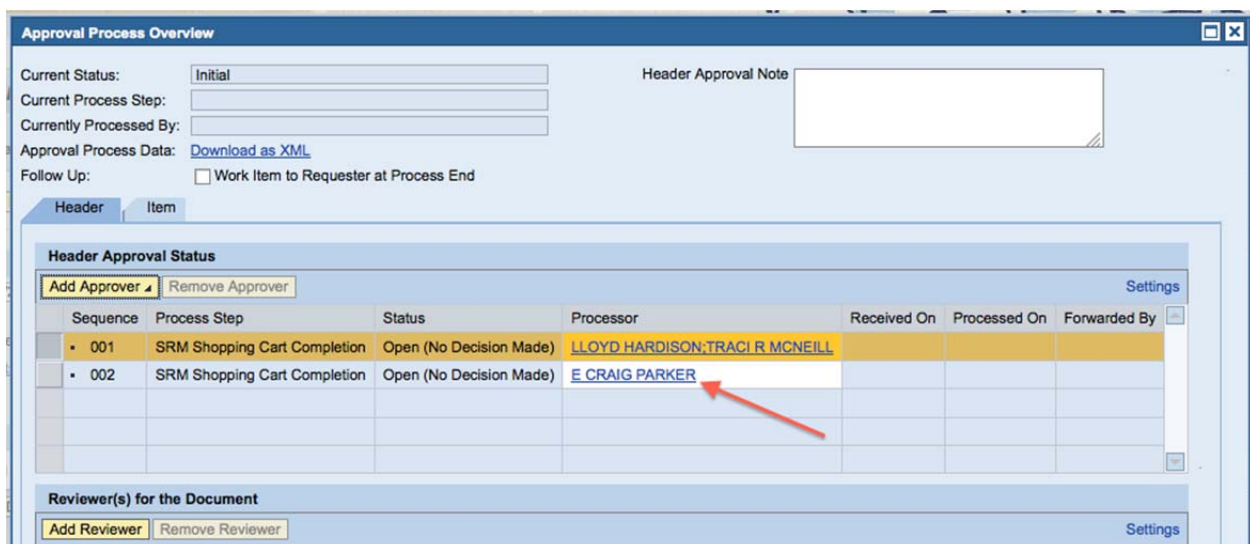
Building:

Telephone Number:

E-Mail Address:

OK Cancel

5. The *Approval Process Overview* shows the ad-hoc approver has been added to the approval workflow. Click *OK* to close this screen.



**Approval Process Overview**

Current Status:

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Follow Up: ☐ Work Item to Requester at Process End

Header Approval Note:

Header Item

**Header Approval Status**

Add Approver Remove Approver Settings

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
• 001	SRM Shopping Cart Completion	Open (No Decision Made)	LLOYD HARDISON;TRACI R MCNEILL			
• 002	SRM Shopping Cart Completion	Open (No Decision Made)	E CRAIG PARKER			

**Reviewer(s) for the Document**

Add Reviewer Remove Reviewer Settings

6. Addition of the ad-hoc reviewer can also be verified in the line item *Details* section on the *Approval Process Overview* tab:

Details for Item 1 VWR MICROSCOPE COMPOND TRINCLR

Item Data | Account Assignment | Notes and Attachments | Delivery Address | Supplier Info | **Approval Process Overview**

Current Status:   
 Current Process Step:   
 Currently Processed By:   
 Approval Process Data: [Download as XML](#)  
 Follow Up: ☐ Work Item to Requester at Process End

**Item**

**Approval Status Details for Selected Item**

Sequence	Process Step	Level Status	Status	Processor	Received On	Processed On	Forwarded By	Agent Determination
• 001	SRM Shopping Cart Completion	Valid (Can be Started)	Open (No Decision Made)	LLOYD HARDISON, TRACI R MCNEILL				Level One - Spending Limit or Restricted Fund Review
• 002	SRM Shopping Cart Completion	Valid (Can be Started)	Open (No Decision Made)	E CRAIG PARKER				ADHOC