

Yo-Mart Training Manual – Approvers

Go to the AppLEAP page located at www.appleap.appstate.edu. Click on System Access and then **Yo-Mart Shopping**.

Enter your User Name in the UserID field. Enter your enterprise password, click Sign In.



Shibboleth Single Sign-On

UserID (email and workstation login):

Password:

Do Not Bookmark This Page

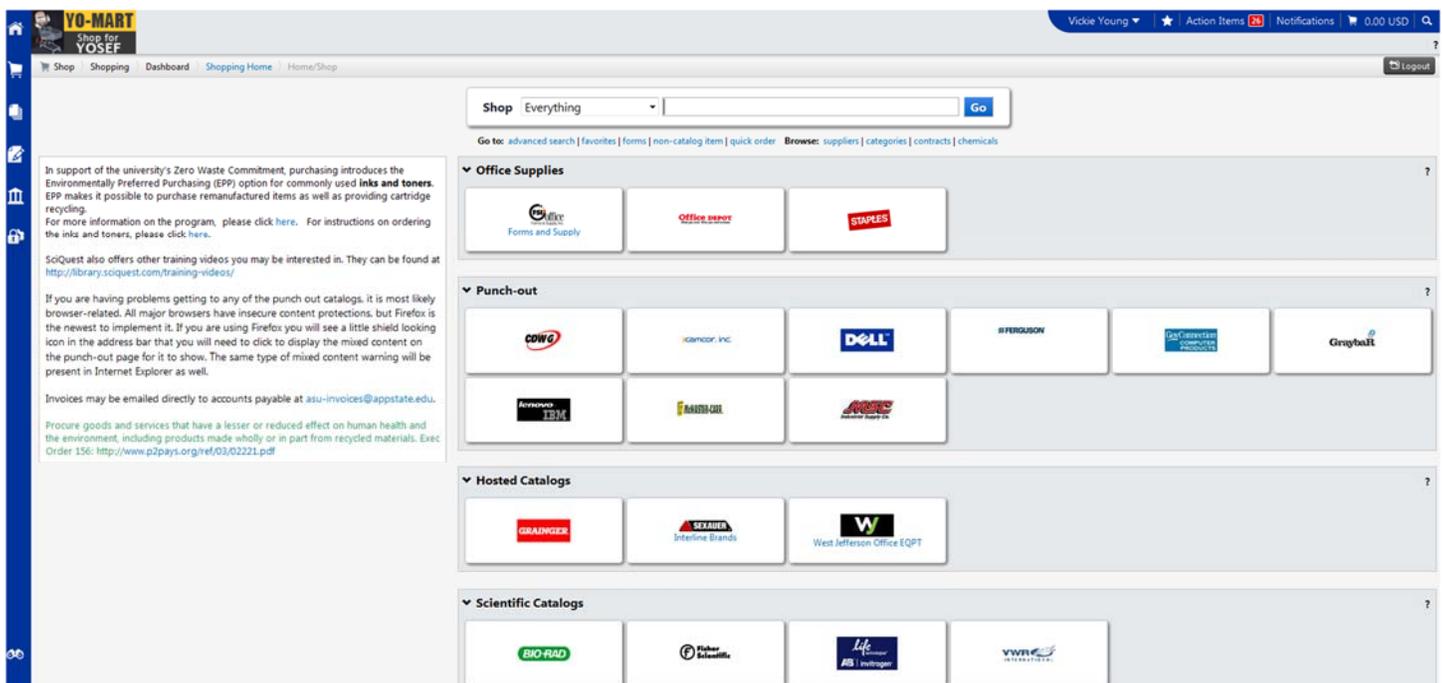
Shibboleth works by authenticating your Appalachian ID and password, and then redirecting you back to the service you came from. If you bookmark this page, Shibboleth won't know which service to send you back to, and will display an error.

⚠ IMPORTANT To protect your personal information, you must close every instance of this browser that is open on your computer when you log out.

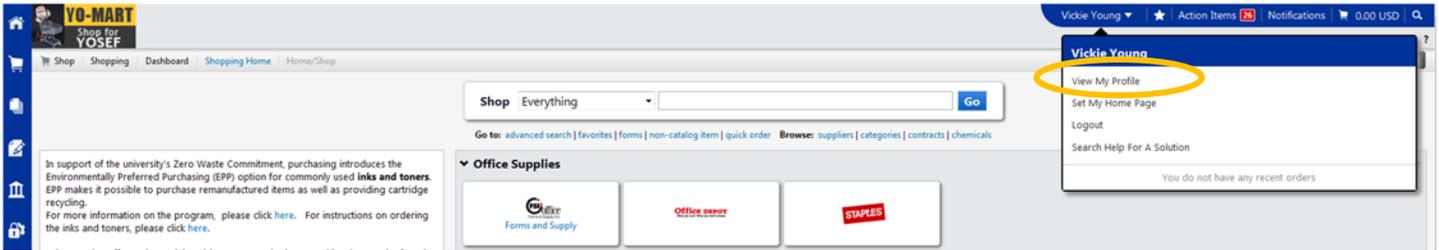
[Forgot your username or password?](#)

For assistance please call Technical Support:
828-262-6266, available 8am-5pm Mon-Fri

After logging into Yo-Mart you will access the main workspace overview. The main workspace is where you will view and manage the active Yo-Mart feature. As you access other areas of the application only the main workspace changes and the side navigation menu and top banner remain in place. At all times, the main workspace will display breadcrumbs that tell you what page you are on the navigation path to the page. A drop-down icon beside a page name indicates that you can select it to access another page.



From here you can edit your profile notification preferences, approve requisitions and view history. To edit your profile, click on your name and then "View My Profile."



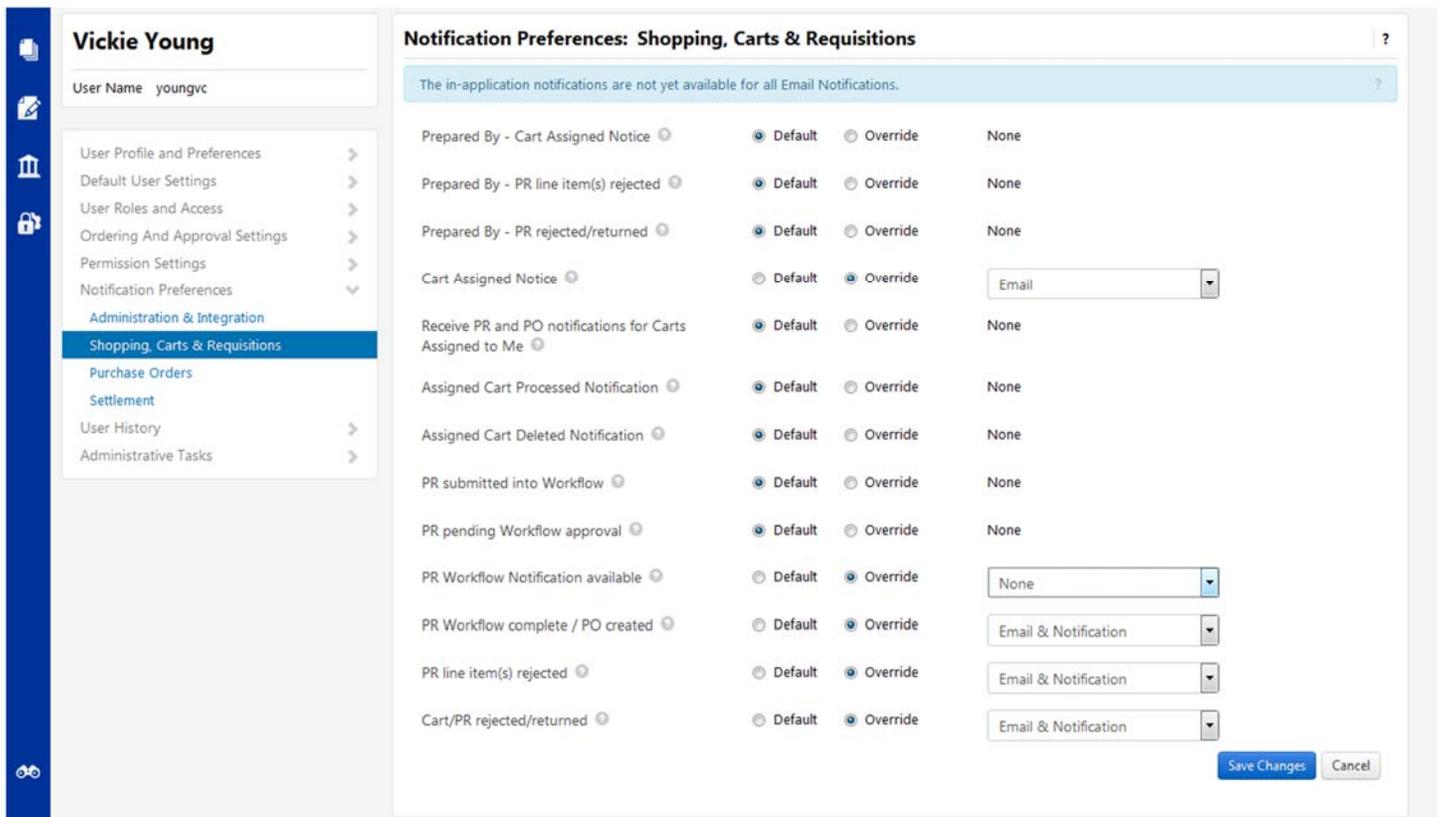
Setting Profile Notification Preferences

Yo-Mart can be configured to notify you when specific events happen in the system or when a pending issue requires your attention, such as when a requisition requires your approval.

Click on the Notification Preferences menu option on the left. Select a sub-menu to choose a specific notification preference. For example, the "Shopping, Carts & Requisitions" sub-menu contains notifications related to requisition workflow approval. The notifications will display. To the right of the notification name the status of the notification for the user displays:

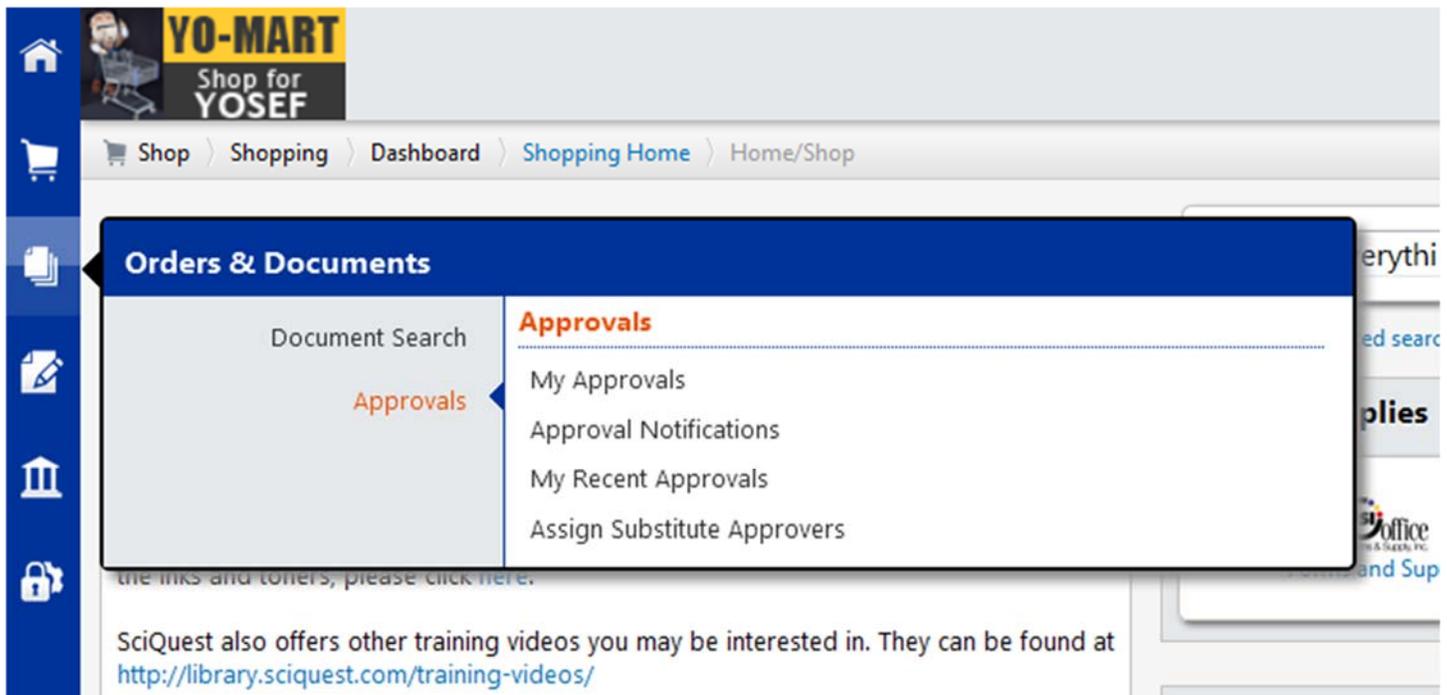
- **Email** indicates that the user receives the notification by email.
- **Notification** indicates that the user receives the notification in the application.
- **Email & Notification** indicates that the user receives the notification in both ways.
- **None** indicates that the user does not receive this notification.

Click on the [Edit Section](#) link to display the radio button options. To change your preferences, click the [Override](#) radio button, make your selection and click on [Save Changes](#).



Performing Approvals Step by Step

Go to **Orders and Documents > Approvals > My Approvals**. Or click on the **Action Items** in the top banner navigation and select the appropriate link.



You can change the document view by clicking the **Group Results by** drop-down. If the documents are grouped by folder, click the folder icon or name to expand the list. If you do not wish to edit the requisition you can approve it by choosing "Approve/Complete Step" from the Available Actions drop-down.

If more than one person approves for your area, you must assign the document to yourself to edit. Assigning the requisition to yourself places it in your approval folder and makes you responsible. Once the requisition is assigned to you, the Available Actions include:

- Approve/Complete and Show Next
- Approve/Complete Step
- Return to Shared Folder
- Return to Requisitioner
- Forward to...
- Add Comments
- Add Notes to History
- Copy to New Cart
- Reject Requisition

Please note that if you reject a requisition, the requestor must copy it in order to resubmit but if you return the requisition, the requestor can edit and resubmit it.

You also have the option to delete select line items from a requisition. You are required to assign and open a requisition before you can reject either the entire requisition or lines contained in the requisition.

You can also add a **Comment** to a requisition. Comments provide a way for approvers to communicate any questions they have to the requisitioner or to any other Yo-Mart user.