INSTRUCTIONS FB PURCHASE REQUESTS MANDATES

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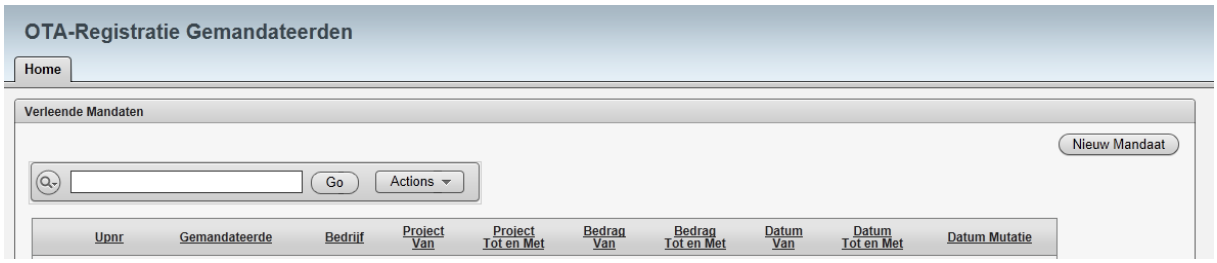
1. LOGGING IN

Only budget holders (approvers of purchase invoices) may log in (with M-number and Windows password) in order to grant mandates to one or more people for the approval of purchase requests.

The web application FB Purchase Requests Mandates can be found in the UT website's staff portal, in the section Administrative applications.

2. HOMEPAGE

The first time you log in you will not see any data. This is because you have not granted any mandate yet.



After you have granted one or more mandates, you will see a list of all the mandates each time you log in.
The following data are displayed for each mandated person:

- **Upnr**: m-number of the person
- **Gemandateerde**: name of the person
- **Bedrijf**: faculty of service centre (company)
- **Project van** (= from project number) and **Project tot en met** (= to project number, inclusive): project number or series of project numbers you are responsible for (budget holder) and to which the mandate applies.
- **Bedrag van**: minimum amount (optional)
- **Bedrag tot en met**: maximum amount (optional)
- **Datum van** and **Datum tot en met** (optional): period of time for which the mandate applies.
- **Datum Mutatie**: when the mandate has last been changed.

The web application provides a **search/filter function**. You will find the search box above the list of mandates.

All data on the screen can be searched. For example, type the name of the mandated person if you want to view the mandates that you have given to this person. Click the button **Go** or press Enter in order to display the results.

Click on this icon if you want to remove a filter.

3. WHEN DO I HAVE TO SET MANDATES?

Purchase requests that are submitted via the web application FB Purchase Requests are by default routed to the budget holder (approver of purchase invoices) responsible for the OFI-number for approval.

However it is possible to change this route and set up de approval workflow to your liking. With the web application FB Mandates Purchase Requests, you can have the purchase requests routed to someone else (one or more persons).

Especially in the situations below, you will have to set mandates:

- *You and other people from your research group/department are authorized to submit a purchase request to the Procurement department*.
  In this case you will have to set a mandate for each person who is authorized, including yourself.

- *You are not the person who gives approval for purchase requests. Someone else or other people from your research group/department has/have this authority.*
  In this case you will have to set a mandate for each person who is authorized.

- *The approvers (budget holder and/or mandated persons) are on holiday or sick*
  Before you go on holiday, it is important to set mandates for the person(s) who is (are) authorized to approve purchase requests in your absence. You can set vacation rules in advance by using the field **Datum van** (= from this date).

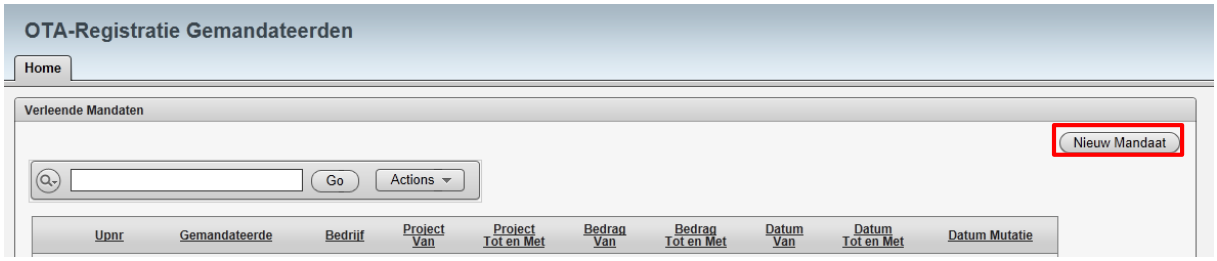
You can set as many mandates as you like.

What if there are several approvers for one (or for a series of) OFI-number(s)?

- The request for approval will simultaneously be sent to all approvers.
- Once the purchase request is approved by one of the approvers, it will get the status "*Approved*". The status of the purchase request is simultaneously updated so that the other approvers can see that the purchase request has already been approved.
- If the requester uses the search function to fill in the OFI-number, he or she will see all the persons who are at this moment authorized to give approval.
- The name of the person who has approved the purchase request will appear on the purchase request form that is sent to the Procurement department.

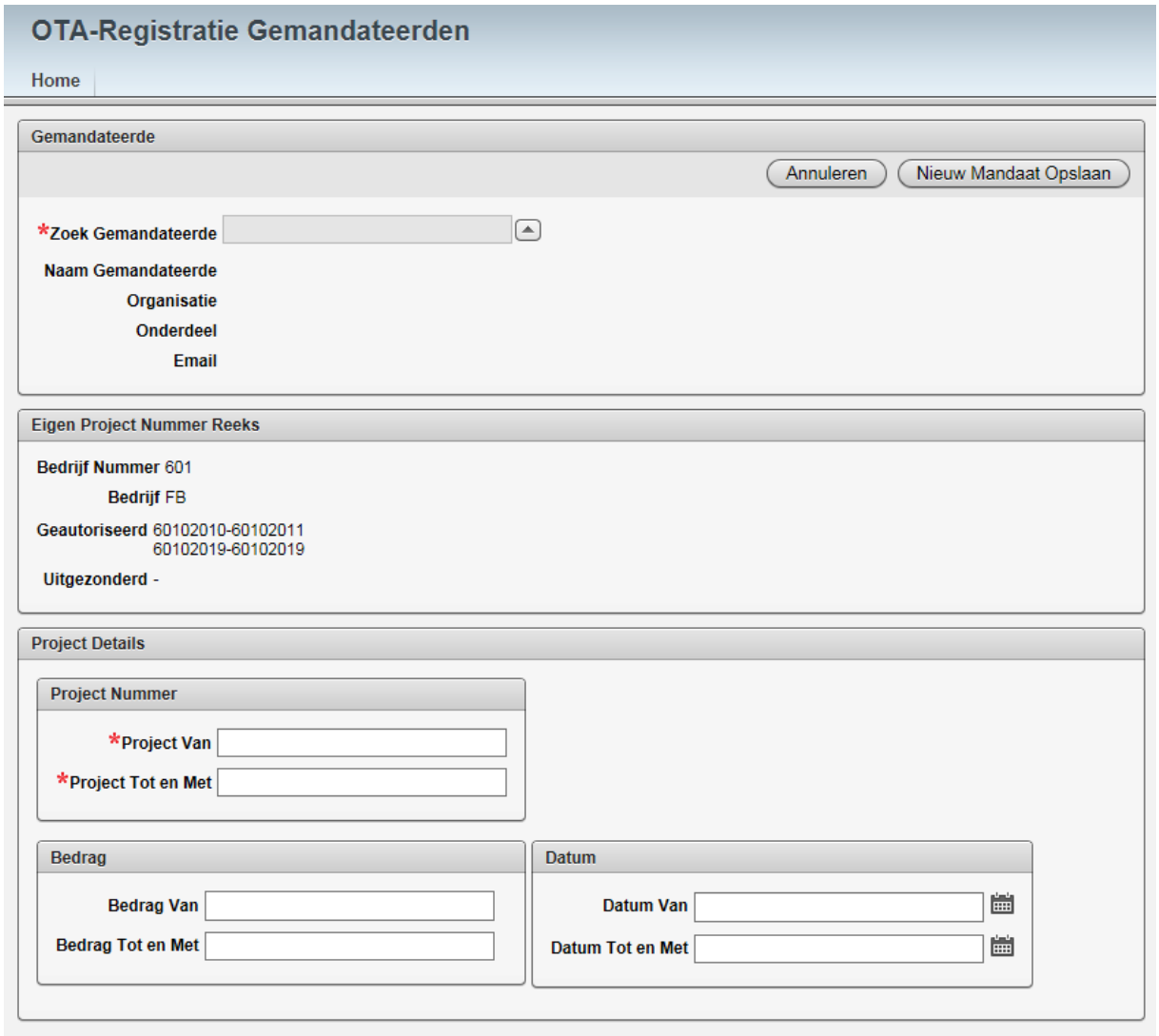
4. HOW CAN I SET MANDATES?

Click on **Nieuw mandaat (= new mandate)**.



A list of all the series of OFI-numbers for which you are responsible (budget holder) will be displayed.

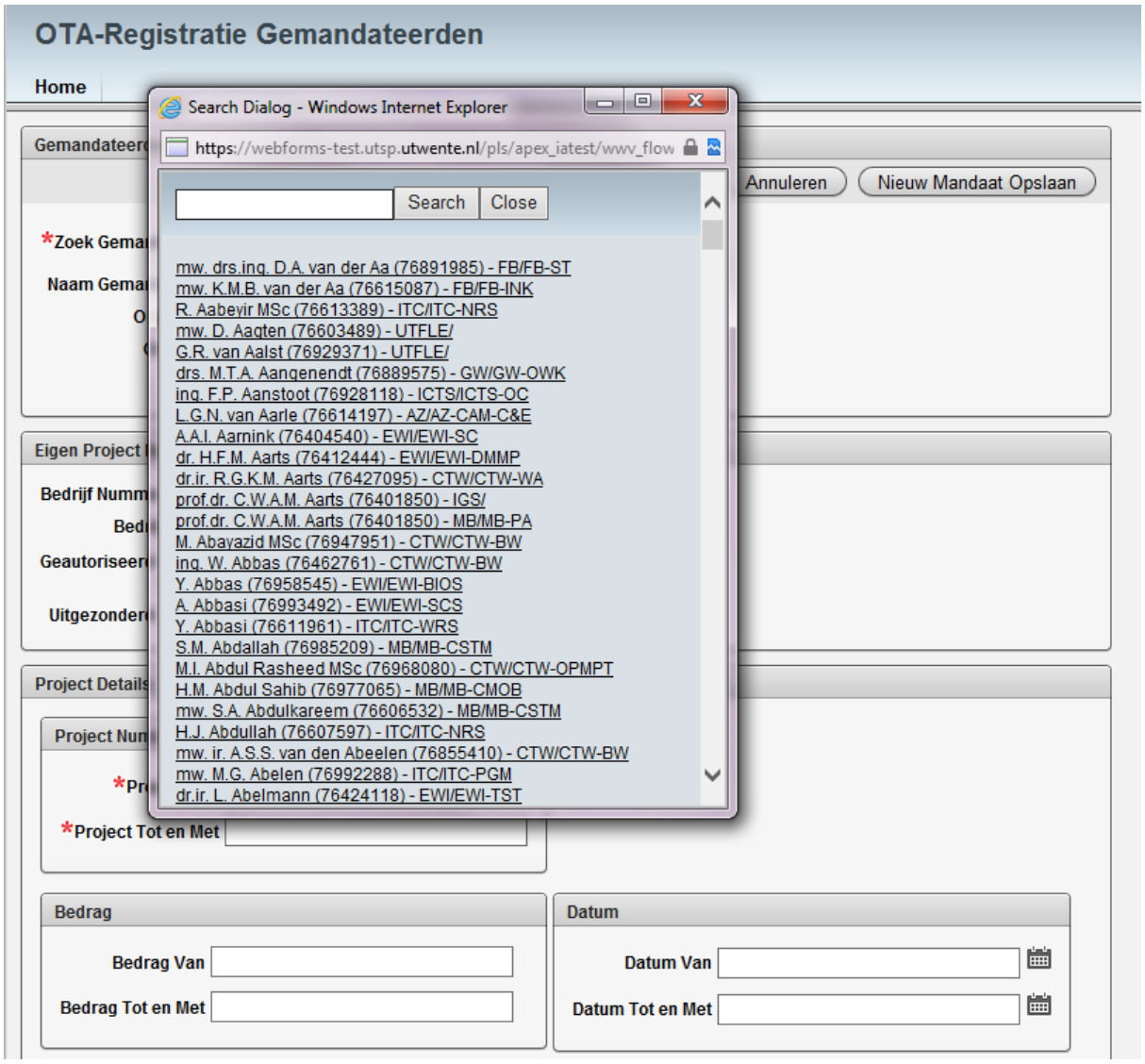
First select the company (bedrijf nr). A new mandate form will appear:



Each form consists of 3 parts: Gemandateerde (= mandated person), Eigen projectnummer reeks (= your series of OFI-numbers) and Project details (= details of the project). Mandatory fields are marked with an asterisk *.

Gemandateerde

You first have to specify the name of the person you want to authorize. To do this, click on the small arrow next to the empty field **Zoek Gemandateerde** (= search mandated person). A window with a search box will be displayed, where you can enter the name of the person. Then click on **Search** to display the results.



Click on the desired employee. The field **Naam gemandateerde** (= name of mandated person) will automatically be filled with the chosen employee.

Eigen Project Nummer Reeks

You do not need to fill in any data in this part of the form. What you see next **Geautoriseerd** (= authorized) are the series of OFI-numbers you are responsible for (budget holder) and for which you can grant a mandate. If applicable, you will see next to **Uitgezonderd** (= except for) for which OFI-numbers you cannot give any mandate.

Project details

In this part only the fields **Project van** (= from project number) and **Project tot en met** (= to project number, inclusive) are mandatory.

Type the OFI-number or the series of OFI-numbers to which the mandate applies.

If you want you can fill in a minimum and maximum amount. Examples:

- Type in the field **Bedrag tot en met** (= to the amount of) €500 if you want to authorize the person to give approval only for purchase requests below €500 for this series of OFI-numbers.
- Type in the field **Bedrag van** €500 if you want to authorize the person to give approval only for purchase requests above €500 for this series of OFI-numbers.

You also have the possibility to specify a period of time when the mandate applies. Especially when you or the mandated person(s) is/are sick or going on holiday, you will have to fill in the fields **Datum van** (= from date) and/or **Datum tot en met** (= up to and inclusive date).

Important:

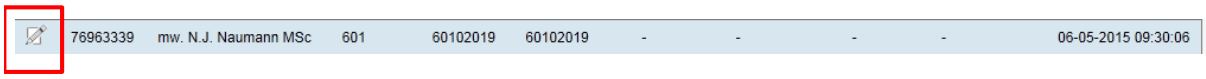
- **The web application FB Purchase Requests takes into account the amounts and start- and end-dates of the mandate when sending the requests for approval.**
- **Minimum and maximum amounts apply to the OFI-number (or series of OFI-numbers) filled in and not to the mandated person.**

Click on **Wijzigingen opslaan** in order to save the mandate.
Click on **Annuleren** (= cancel) if you do not want to save the mandate.

5. HOW CAN I MODIFY MANDATES?

You can modify the mandates at any time. Especially when you or the mandated person(s) is/are sick or on holiday.

Modify mandate
Click on the pen next to the M-number of the mandated person whose mandate has to be modified.



The mandate form is displayed and you can change any data.
Click on **Wijzigingen opslaan** (= save changes) in order to save the modifications.

Delete mandate
Click on the pen next to the M-number of the mandated person whose mandate has to be deleted.
The mandate form is displayed. Click on **Verwijderen** (= delete). A pop-up will appear and ask if you are sure to want to delete the mandate. Click on **OK** to confirm.

Delete all the mandates of a mandated person
Click on the pen next to the M-number of the mandated person of whom all mandates have to be deleted.
The mandate form is displayed. Click on **Verwijder alle mandaten** (= delete all mandates). A pop-up will appear and ask if you are sure to want to delete all the mandates of this person. Click on **OK** to confirm.

Important:
Changes in the mandates have immediate effect for purchase requests that are already waiting for approval.