

## **Job Aids**

## Setting Order Thresholds in Spartan Marketplace

**Overview:** This job aid demonstrates how to set customized thresholds within the Kuali Financial System for all orders placed through Spartan Marketplace. Thresholds may be set by account number for workflow routing. If no threshold is set, orders will route at the \$2,500 default amount.

1. Log in to <u>ebs.msu.edu</u> and click the Financial System tab.

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Enterprise Business S	systems My Approv	als & Workflow My	Fime & Payroll My P	ersonal Information	My Career & Training	My B
Financial System	Business Intelligence & Analytics	Materiels Management	Spartan Marketplace One-Stop Order Portal	<b>U-Track</b> Campus Package	Non-Stock Orders (Open Orders)	
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2. In the Lookup and Maintenance column, click on Order Auto Limit under Spartan Marketplace.



3. To view a full list of account numbers and their corresponding thresholds, click **Search**. Or search by the other available parameters (i.e., your department's account numbers).

Chart Code:	
Account Number:	<u> </u>
Limit Amount:	
Active Indicator:	Yes No 🖲 Both

- 4. In the search result, click **edit** to change the information of an existing threshold, **copy** to add a new account number, or **create new** to add a new threshold for an account.
  - a. **Note**: Orders with multiple accounts will route to all approvers at the lowest threshold limit set by a department. If a threshold limit is not set, the workflow approval process will default to \$2,500—the same threshold as University Stores orders.

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			Account Number:	P		
			Limit Amount:			
			Active Indicator:	: 🔾 Yes 🔍 No 🖲 Both		
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	displaying 1 to 100.[First/Prev] 1					
Actions	<u>Auto Limit Id</u>	Chart Code	Account Number	Limit Amount	Active Indicator	Last Update Date
					Active Indicator Yes	Last Update Date 08/23/2011

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