

HP2B user roles and approval workflows

HP2B user roles and approval workflows



HP2B is your organization's own customized HP online store that frees you from the red tape and paperwork that is ordinarily part of IT procurement. Intuitive and easy to use,

HP2B allows you to focus on more valuable aspects of your job.

This quick guide is designed to help you understand all the different user roles that can be defined within HP2B, and which capabilities are assigned to each one.

We'll also show you how to create automatic workflows to streamline approvals and avoid purchasing errors.



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Introduction



Introduction

A key feature of HP2B is that you can **define different roles for different types of users**. This gives you control over privileges within the system.

You can also create workflows that automatically route purchasing requests through the system for approval. For example, you may want a marketing professional to be able to view the catalog of HP products and services – which has **pre-negotiated standard products and prices in it** – and request the purchase of a new scanner. But you don't want to give her the authority to actually issue a purchase order (PO). She must send the request to her manager, who controls the budget, to create and approve the PO.

If you choose – for example, if the amount of the scanner is above a certain price threshold – her manager could even be required to get approval from a user with a higher assigned role.

All this can be **managed automatically** within HP2B workflows.

Types of users

Types of users

There are six types of user roles.

Each role varies by its access rights and what actions the user is authorized to take.

Any type of user (viewer, requester, purchaser, manager, end customer, or customer administrator) can have additional capabilities added to their role, such as Order Reporting Access and the “view all quotes” capability.

Role	Definition	HP2B Privileges
Viewer	This type of user is the most restricted. Viewers can look at what’s been negotiated as available for purchase, and at what prices. They can create a “quote” – basically an informal request to purchase products or services – and pass it along by email or by using the “share quote capability” to a user who has more authority within HP2B for approval.	<ul style="list-style-type: none">▪ Browse catalog▪ Configure personal “favorite” items for repeat purchases▪ Create, copy, and share quotes by email▪ Apply special pricing codes
Requestor	You would designate a particular individual as a “requester” rather than “viewer” if you want them to participate in an automated approval workflow. Requesters can enter quotes into the system as “purchase requests.” Although purchase requests still require approval from a user with more authority to become official purchase orders (POs), purchase requests are officially entered into the HP2B system and can be tracked and reported on.	Everything a viewer can do, plus: <ul style="list-style-type: none">▪ Create and submit “purchase requests”
Manager	Managers have more responsibility than requesters or viewers. They can approve purchase requests, for example, from requesters.	Everything a requester can do, plus: <ul style="list-style-type: none">▪ Reject purchase requests (giving a reason)▪ Approve purchase requests (which sends a PO to the designated purchaser)
Purchaser	As the highest authority in a workflow, purchasers can either approve or reject purchase requests, or submit POs on their own behalf.	Everything a manager can do plus: <ul style="list-style-type: none">▪ Approve or reject managers’ or requesters’ purchase requests▪ Submit POs directly to HP2B (no approval needed)
End customer	This type of user works for customers that are purchasing HP products and services through partners. If end customers connect to the partner ’ s portal, they won ’ t see HP prices.	Viewer access without prices
Customer Administrator	This designation should only be given to highly trusted individuals, as they will have the power to assign roles and spending limits to other users. Any type of user can also be designated as a customer administrator.	<ul style="list-style-type: none">▪ Assign roles to each HP2B user▪ Assign spending limits (and currencies) to each user▪ Assign who can approve purchase requests and purchase orders▪ Approve/reject user access to different HP2B Capabilities

Order reporting access

Order reporting access

Order reporting access is a feature that allows users to search for and view the status of orders.

They can search based on a number of parameters, such as delivery date, product name or number, price, invoice number, shipment documents, and many others.

Any user can be given access to order reporting access.

There are three levels of order reporting access that customer administrators can assign:

Order reporting access:

☐ Order Status SLA Reporting



Provide access to the “Order reporting access” page

☐ Order Status Prices Limited



Provide access to “Order status” page, but not showing prices.

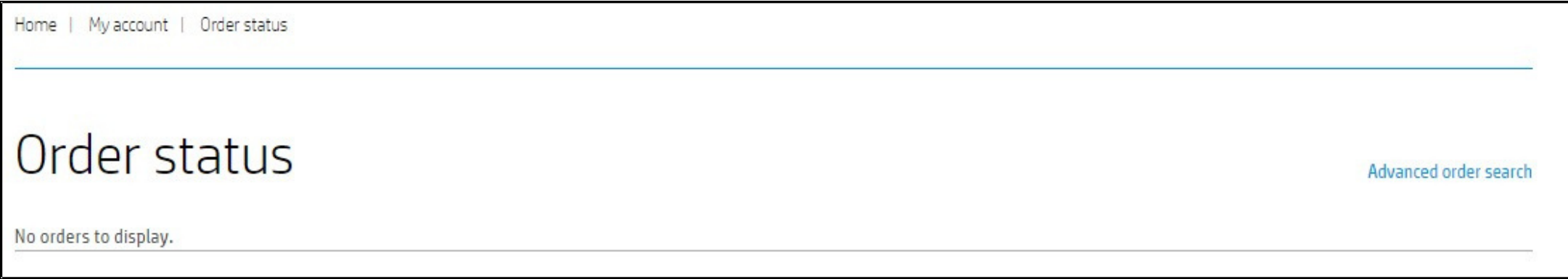
☐ Order Status Prices



Provide access to prices on the “Order status” and “Order reporting” pages.

Advanced order search

If any level of order reporting access is given to a user, an “Advanced order search” link will appear on their “Order status” page, so they know what is happening to an order at any time.



Approval workflows



Your ability to establish an approval workflow is a key feature of HP2B.

Using this feature, you ensure that there is no rogue purchasing – that every purchase is recorded by HP2B, approved by the appropriate people, and put into the system to track and monitor.

You can **choose whether you will be using workflows or not** when your HP representative first sets up your HP2B catalog. If no workflow is chosen, only users who are purchasers can initiate and submit POs.

NOTE: If you choose to deploy a workflow, you must ask your HP customer service representative to choose either “cost-based” or “role-based” workflows when they set up your HP2B catalog. You can always ask to change this later.

Approval workflows

Role-based approval workflows

Role-based approval workflows are exactly what they sound like.

Approvals of purchases are based upon the roles of the individual users making the purchase requests.

There are two tiers to role-based workflows:

- Tier 2 and Tier 3, depending on whether two or more approvers are needed to officially place the order.
- Each type of user (except purchasers) has an assigned “approver.”
- Depending on the tier, a requester will have a specific purchaser (Tier 2) or purchaser and manager (Tier 3).
- In a Tier 2 workflow, the requester initiates the process.
- The purchaser approves the purchase request and submits the PO.
- In a Tier 3 workflow, all three users – requester, manager, and purchaser – are involved.
- The purchase request is submitted by the requestor; the manager and purchaser must both approve it; and the purchaser then submits the PO.



Cost-based workflows

In this workflow, the number of approvers needed – one or two – is **based on the amount of the purchase request**, not the role.

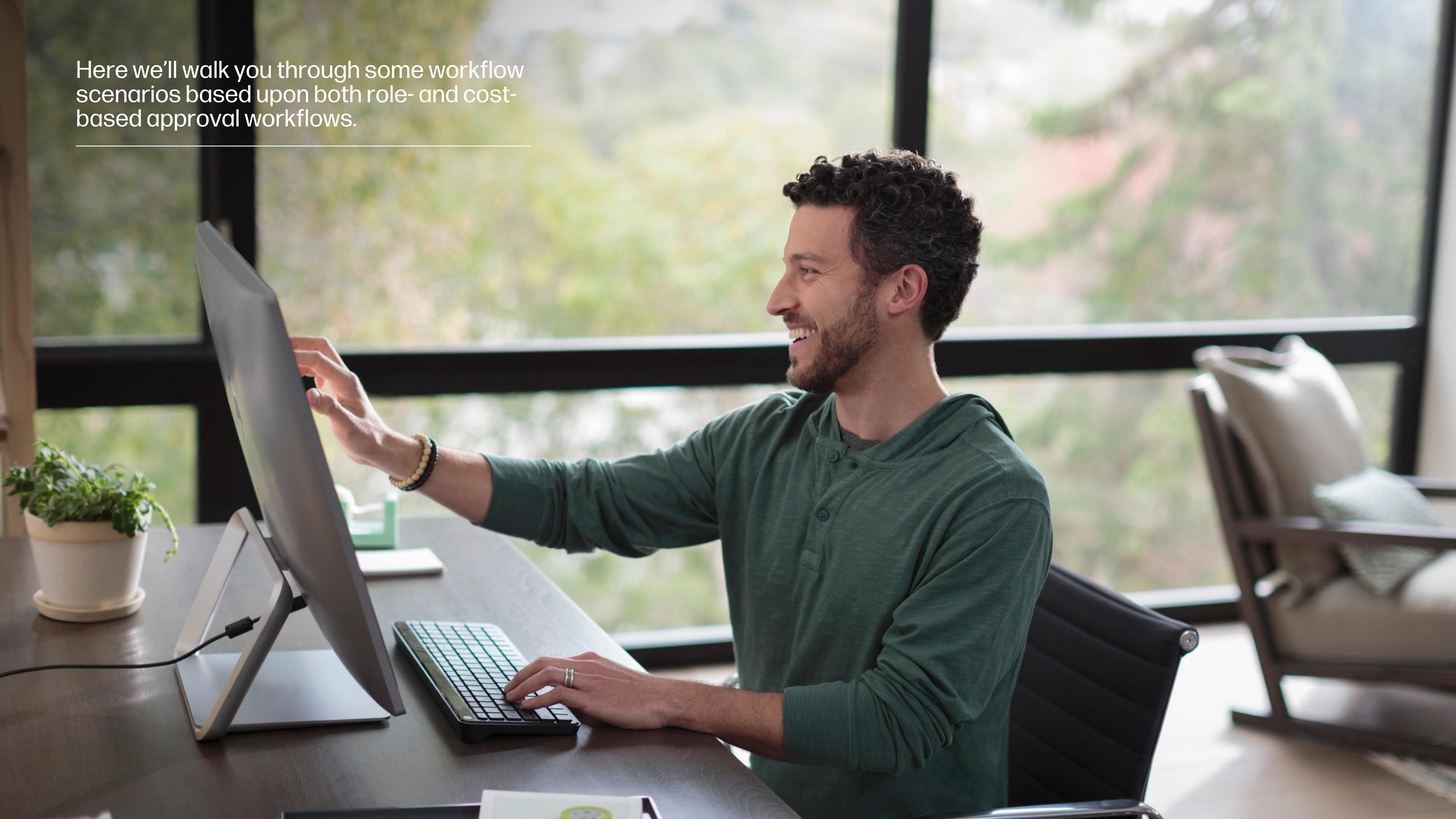
For example, Manager 1 is authorized to approve purchases of less than \$1,000. Manager 2 can approve purchases that are between \$2,000 and \$100,000 and Manager 3 can approve purchases of more than \$100,000.

Choosing this workflow type means you assign spending limits (in whatever currency you like) to users with purchasing authority (managers and purchasers).

Customer administrators do this. They can also add products from HP's "Open Market Catalog" – HP's central catalog of products and services – to their organization's catalogs.

Sample workflows

Here we'll walk you through some workflow scenarios based upon both role- and cost-based approval workflows.



Sample role-based workflow 1:

Creating a purchase request

(1) Our role-based user has been assigned a requester role. The first thing a requester does is log in to HP2B.

(2) Their organization's Home Page appears.

(3) The requester chooses the products they want from the catalog and clicks on "Checkout" to continue.

1

Log in

Language:

United States English

Username:

lemon.enterprises.info@gmail.com

Next

2

hp

HP2B

Customer Account Name

All

What are you looking for?

Quick Order

Notifications

Favorites

My Profile

Cart

Home

Products & Services

Orders & Quotes

Reports

HP Support

Manage Account

United States English

Message to the customer

Monitor

Tower

Headset

Mouse

Printer

Laptop

Welcome to HP2B

HP2B is a B2B online shopping experience for Corporate Enterprise and Public Sector customers.

Get a custom catalog of HP products and services tailored just for your organization and streamline your procurement process.

3

Shopping cart

Cart summary

Quickly add to cart

Simply enter the product number from the catalog for items to be added to this order.

Search product name / part number

Remove Selected

Update All

Product	Qty	Each	Total
<div><div><div><div></div></div><div><div>HP EB840G6 i5-8365U 14 8GB/256 PC</div><div>SKU: 6YP52AW#ABU</div><div>Expand Attributes</div><div>Add a care pack</div></div></div></div> <div><div>1</div><div>Update</div></div> <div></div> <div></div>			

Continue shopping

Summary

Subtotal

Checkout

Save as quote

Save as favorite

Feedback

HP2B user roles and approval workflows

Sample role-based workflow 1:

(4) When the requester clicks on “Checkout,” a new screen appears asking them to name their purchase request.

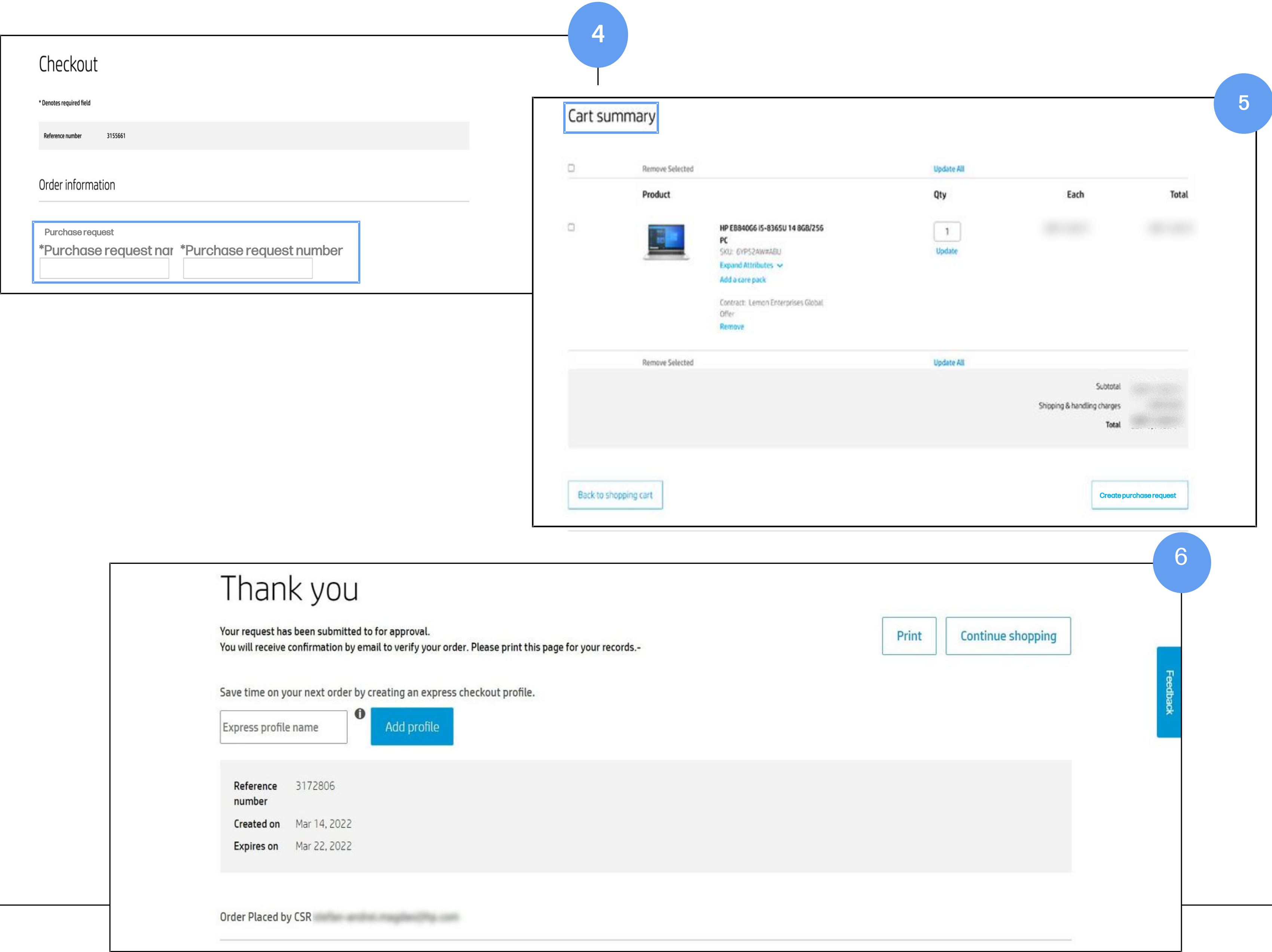
NOTE: They are not given the option to create a PO because, as a requester, **they do not have that authority.**

(5) The requester is asked to confirm the billing and delivery details. They do this, and after clicking “continue,” the “Cart summary” appears.

The requester clicks on “Create Purchase Request” to finish the request.

NOTE: They may also have to click a “Terms and Conditions” box before continuing, depending on how HP2B was set up for their organization.

(6) The “Thank you” confirmation page appears, and the requester will **get an email confirmation** that their purchase request is in the system.



Sample role-based workflow 2:

Approving a purchase request

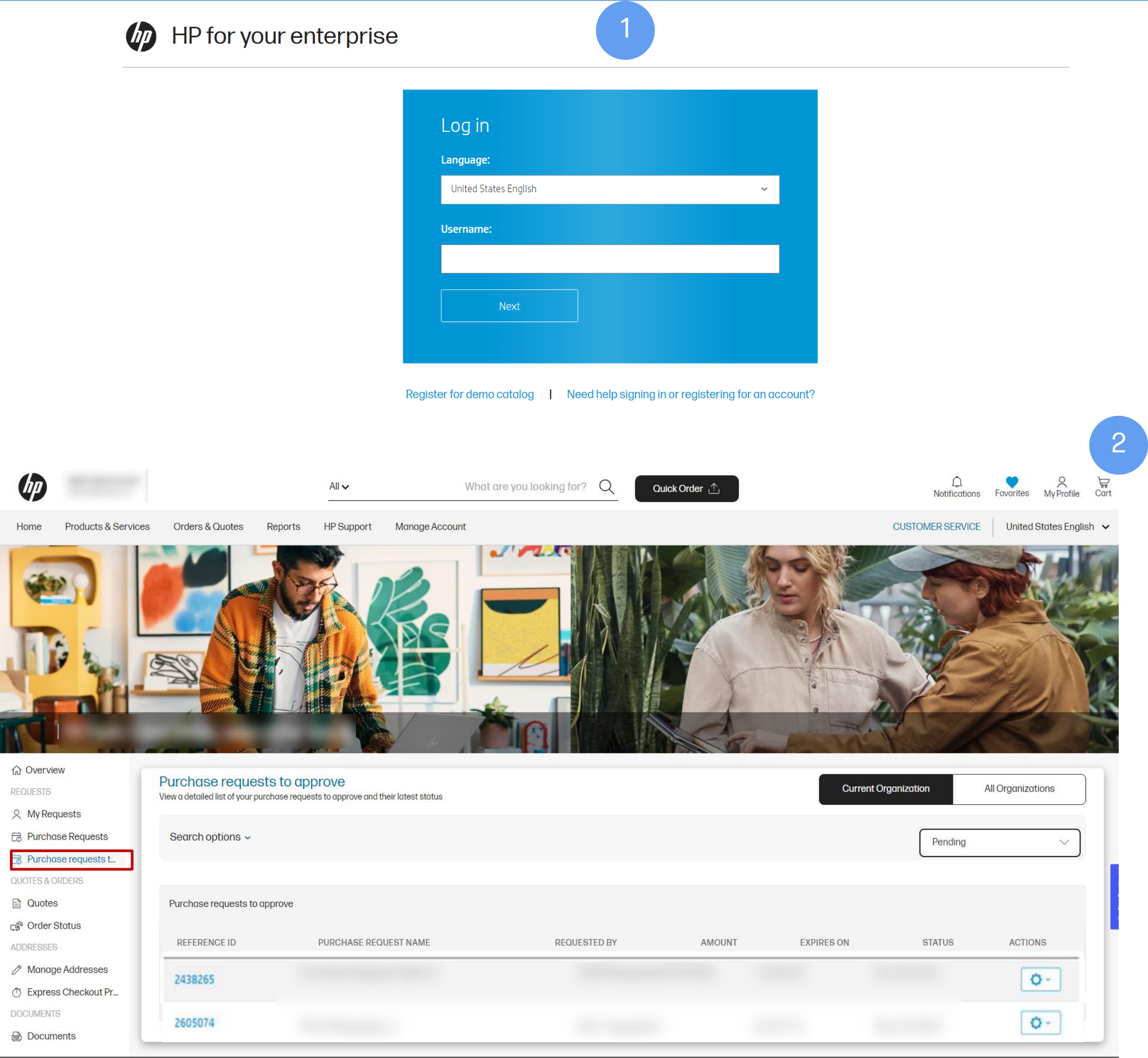
Now we will see how a user who has been designated a manager approves the purchase request.

The manager gets an email telling them that a requester has submitted a purchase request.

(1) First, the manager logs into HP2B.

(2) The HP2B Home Page appears.

The manager clicks on “Purchase requests to approve” (found under the “Manage account” option in the Home Page) to find out if any purchase requests are waiting for approval.



Sample role-based workflow 2:

Approving a purchase request

(3) The “Purchase requests to approve” screen appears.

(4) The manager sees that they have a **purchase request pending** from a requester. The manager can either view details or reject the purchase request.

4

Purchase requests to approve

Search options

View pending

Reference ID	Purchase request name	Requested by	Amount	Expires on	Status	Actions
2438265					Pending	<div></div>
2605074					Pending	<div></div>
3172806					Pending	<div></div>
3131037					Pending	<div>View details</div>
1770357					Pending	<div>Reject</div>
1774363					Pending	<div></div>

Feedback

hp

All

What are you looking for?

Quick Order

3

Notifications

Favorites

My Profile

Cart

Home

Products & Services

Orders & Quotes

Reports

HP Support

Manage Account

CUSTOMER SERVICE

United States English

Overview

REQUESTS

My Requests

Purchase Requests

Purchase requests to approve

QUOTES & ORDERS

Quotes

Order Status

ADDRESSES

Manage Addresses

Express Checkout Pr...

DOCUMENTS

Documents

Purchase requests to approve

View a detailed list of your purchase requests to approve and their latest status

Current Organization

All Organizations

Search options

Pending

Purchase requests to approve

REFERENCE ID	PURCHASE REQUEST NAME	REQUESTED BY	AMOUNT	EXPIRES ON	STATUS	ACTIONS
2438265						<div></div>
2605074						<div></div>

Sample role-based workflow 2:

Approving a purchase request

(5) In either case, the “New Purchase Request” page appears.

If the manager **has rejected or wishes to reject the purchase request**, they can write an explanation in the “Comment” section at the bottom of the page and click “Reject.”

An email is sent back to the requester, who can read why the purchase request has been turned down.

New Purchase Request

Requested by

0170053344 Requester <0170053344@hp.com>

Requested on

Mar 14 2022

Expires on

Mar 22 2022

Status

Pending approval

Total

Reference ID

3172806

Feedback

Order information

Payment Method

Purchase Order

*Purchase order name

Order For New Purchase Request

*Purchase order number

123456789

Email notification

0170053344 Requester <0170053344@hp.com>

Legal compliance

Email notification comments

Purchaser contact information

Billing information

Billing address

☐ Default Billing Address

Change billing address

Contract ID

0170053344

Attention to

Phone

Email

Company

Address line 1

Address line 2

Address line 3

City

State/Province

Zip/Postal code

Country

Invoice instruction

Shipping information

Shipping address

Ship to new address

Company

Address line 1

Address line 2

Address line 3

City

State/Province

Zip/Postal code

Country

* Attention to

* Phone

Email

Fax

Shipping options

Requested delivery date

MM/DD/YY

If no specific delivery date is requested HP will endeavor to schedule delivery of your order as soon as possible.

Shipping instructions

Shipping instructions will be reviewed by your account representative and may delay the processing of your order.
Text is limited to 40 characters; please do not enter more than 20 Asian characters

Cart summary

Remove Selected

Update All

Product

Qty

Each

Total

HP EliteDisplay E324q Monitor

SKU: SDP31AA8BB

Expand Attributes

Internal ref. *

#F123

Contract: Inspiration portal

Remove

1

Update

Special pricing code

Apply

Lookup

Subtotal

Total

Add a comment

You can type a comment about the approval or rejection of this order.

Back to all requests

Reject

Approve

HP2B user roles and approval workflows

Sample role-based workflow 2:

- (6) If the manager approves the purchase request, they click on “Approve.” They can also add a comment if they have to add any.
- (7) The purchaser **receives an email** that a purchase request is waiting for their approval. They log in to HP2B and click through to the “Purchase requests to approve” in the Manage Account screen. They locate the manager’s request.

Products & ServicesOrders & QuotesNotificationsPS Services PortalContactCUSTOMER SERVICEUnited States English

HomeMy accountPurchase requests to approve

Purchase requests to approve

Current OrgAll Org

Search optionsView pending

Reference ID	Purchase request name	Requested by	Amount	Expires on	Status	Actions
2438265					Pending	
2605074					Pending	
3172806					Pending	
3131037					Pending	
1770357					Pending	
1774363					Pending	

(1 - 6 of 6)

Add a comment

You can type a comment about the approval or rejection of this order.

Back to all requestsRejectApprove

Notifications

Help

Submit web request

Support & Troubleshooting

Accessibility

Drivers & Software

Sample role-based workflow 2:

(8) The purchaser clicks on the “Actions” blue wheel icon of a purchase request to view details or to reject it.

(9) The purchaser clicks “View details” and the “Order summary” page appears. The purchaser then clicks on “Create purchase order.”

At this point, the purchase request is turned into an official PO and submitted to the HP2B system.

9

Cart summary

EMEA_Fallback region level cart disclaimer local pricing

Remove Selected

Update All

	Product	Qty	Each	Total
<div><div></div></div>	<div><div><div>hp</div></div><div><div>HP EliteDisplay E233 Monitor HE</div><div>SKU: 1FH46AA#ABT</div><div>Expand Attributes</div><div>Add a care pack</div></div><div><div>Contract: Norway_STM FEB release contract-1</div><div>Remove</div></div></div>			

 1 Update | | |

Remove Selected

Update All

Special pricing code

Apply

Subtotal

Shipping & handling charges

Total

Back to shopping cart

Create purchase order

8

Reference ID	Purchase request name	Requested by	Amount	Expires on	Status	Actions
2438265					Pending	<div><div></div></div>
2605074					Pending	<div><div></div></div>
3172806					Pending	<div><div></div></div>
3131037					Pending	<div><div>View details</div></div>
1770357					Pending	<div><div>Reject</div></div>
1774363					Pending	<div><div></div></div>

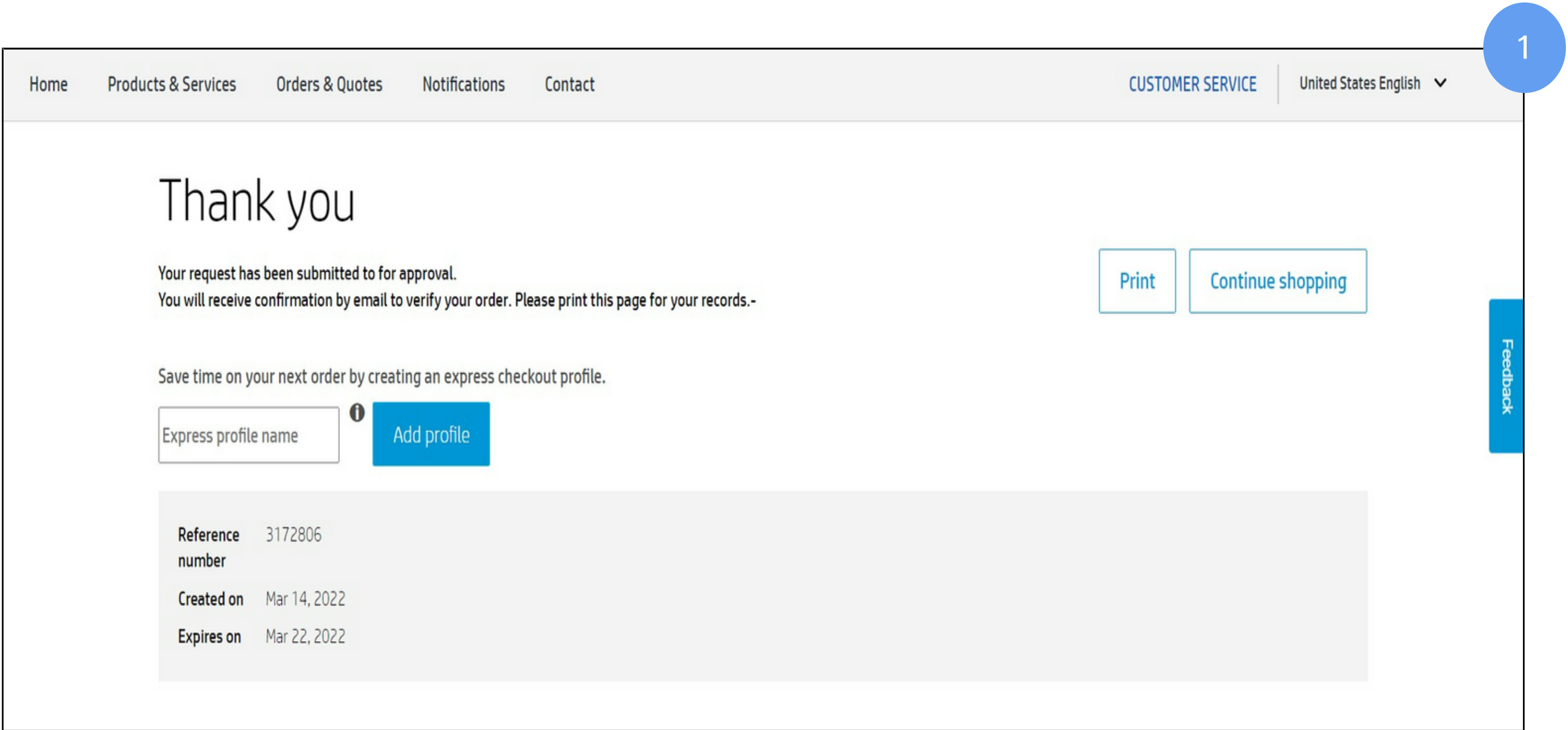
Sample cost-based workflow 1:

Creating a purchasing request

Let’s now look at how a **cost-based workflow works**.

At first, it is the same as a role-based workflow.

A user given the role of a requester logs in to the system, shops for products, places them in the shopping cart, and creates a purchase request. (1) The “Thank you” confirmation page appears, and the requester gets an email confirmation that their **purchase request is in the system**.



Sample cost-based workflow 1:

Approving a purchase request

Now we will see how a manager **approves a cost- based purchase request**.

The manager gets an email informing them that a purchase request has been submitted.

They log in to HP2B and click on the “Manage account” option from the home page.

They select “Purchase requests to approve” option, to start the approval process.

They click on “View details” to see the submitted Purchase Order details.

They click “Approve” to approve the purchase order request .

Reference ID	Purchase request name	Requested by	Amount	Expires on	Status	Actions
2438265					Pending	
2605074					Pending	
3172806					Pending	
3131037					Pending	<div>View details</div>
1770357					Pending	<div>Reject</div>
1774363					Pending	

Shipping instructions will be reviewed by your account representative and may delay the processing of your order.
Text is limited to 40 characters; please do not enter more than 20 Asian characters

Cart summary

Remove Selected

Update All

Product	Qty	Each	Total
<div><div><div><div></div></div><div>HP EliteDisplay E324q Monitor</div><div>SKU: SDP31AA#ABB</div><div>Expand Attributes</div><div>Internal ref. *</div><div>#F123</div><div>Contract: Inspiration portal</div><div>Remove</div></div></div> <div></div>	<div>1</div> <div>Update</div>		

Remove Selected

Update All

Special pricing code

Apply

Lookup

Subtotal

Total

Add a comment

You can type a comment about the approval or rejection of this order.

Back to all requests

Reject

Approve

Notifications

Help

Submit web request

Support & Troubleshooting

Accessibility

Drivers & Software

Sample cost-based workflow 2:

If the purchase request exceeds the spending limit set within HP2B for this manager.

A message in red appears: **“The total exceeds your spending limit. The purchase request will be sent to the next level approver.”**


This means that the purchase request must go to a user – a purchaser – with a higher-amount authority for final approval.

A user who has been designated as a purchaser with more purchasing power than the manager receives an email that **a purchase request is waiting for approval.**

They log in to HP2B and click through to the “Purchase requests to approve” from the Manage Account option in the home page and approve it.

Because the amount is within the purchaser’s approved purchasing power, the purchase request **is turned into an official PO**, and submitted to the HP2B system. From this point on, any of the users involved in this sequence of events can log in to HP2B and see the status of the order.

Order summary

Product	Qty	Each	Total
<div><div><div>HP Elitex2G4 i5-8265U 13 8GB/256 PC</div><div>SKU: 7KN89EA#ABE</div><div>Internal ref.: as</div><div>Expand Attributes</div><div>Contract: Inspiration portal</div></div></div> <div>1</div> <div></div> <div></div>			

Subtotal

Total

The total exceeds your spending limit. The purchase request will be sent to the next level approver.

Add a comment

You can type a comment about the approval or rejection of this order.

Back to all requests

Reject

Submit for approval

Notifications

Help

Submit web request

Support & Troubleshooting

Accessibility

Drivers & Software

Sample cost-based workflow 2:

Creating purchase requests without assigned approvers

Any purchase that this user requests needs to go to a manager or purchaser with a higher purchasing limit for approval.

But in this case, no approver has been assigned.

So the purchase request goes to a “pool” of requests that any purchaser with sufficient financial authority can approve.

Any such purchaser can add a note and click “Create purchase order.”

At this point, the purchase request is turned into an official PO, and submitted in to the HP2B system.

Reference ID	Purchase request name	Requested by	Amount	Expires on	Status	Actions
2438265					Pending	<div><div></div></div>
2605074					Pending	<div><div></div></div>
3172806					Pending	<div><div></div></div>
3131037					Pending	<div><div>View details</div></div>
1770357					Pending	<div><div>Reject</div></div>
1774363					Pending	<div><div></div></div>

Cart summary

Remove Selected

Update All

Product	Qty	Each	Total
<div><div><div><div></div></div><div>HP E8B40G6 I5-8365U 14 8GB/256 PC</div><div>SKU: GYPSQAW#ABD</div><div>Expand Attributes</div><div>Add a care pack</div><div>Internal ref.*</div><div>#F123</div><div>Contract: Inspiration portal</div><div>Remove</div></div></div> <div>1</div> <div>Update</div>			

Special pricing code

Apply

Lookup

Subtotal

Total

Back to shopping cart

Create Purchase Request

Tariffs

For configured products, trade bloc adjuster and exchange rate conversions are applied and rounded at the component level. There may be slight differences in the total configuration local prices between two configs with the same US\$ or Euro base price. Prices shall remain valid for 30 days unless otherwise stated in this quote or otherwise agreed in a framework agreement. Any time before the acceptance of this quote HP shall be entitled to revoke the quote or to replace it by submission of a new quote.

This message confirming the local HP Inc. entity delivering the order does not apply in case You are financing Your order through third party. In that case Your selected financing company will become in fact the vendor of the HP products and services to You. Information about Your use of third party financing will be updated on Your purchase orders based on the agreement between You and the third party financing. For any information regarding Your third party vendor details, please contact Your financing company.

Customer's order is governed by its global master agreement with HP, except to the extent HP [local terms](#) are mandatory under local law or business practices.

Please note: the amount shown here for regulatory fees is an estimate. Final amount will be available on your invoice

Products and services provided under these terms are for Customer's internal business use and not for copying copyrighted works under statutory copyright exceptions or for further commercialization (unless approved by HP in a sales agreement)

For Printer, External Burner, External hard disc, Copier, PC, Scanner, Telefax and Workstation, for which under Germany Copyright Law a Levy is due , HP as manufacturer pays this Levy to the Collection Societies. The Levies are as follows:

- Scanner: 10€
- Thermal and Ink Jet Fax: 4€
- Laser Fax: 8€
- Laser Printer: 10€
- Ink Jet Printer: 4€
- Laser Multifunctional/Copier: 20€ for 14 CPM, 40€ for 15 to 39 CPM, 70€ for 40 CPM and above
- Ink Jet Multifunctional: 12€
- Desktop PC as well as mobile PC with a screen bigger 12.4" /31.49 cm: 10.55€*
- small, mobile PCs: 8.50 € PC with a screen size of up to 12.4 inches (up to 31.49 CM)
- Workstation: 3.20€
- External Burner 2.00€
- *External Hard Disc 3.55€*

* Commercial end user that fulfil predefined criteria, pay 3.20€ per PC (with a screen bigger 12.4"/31.49 cm) and € 1.06 for external hard discs.

Glossary

User

A user is anyone who has been assigned one of the six roles. They can be a customer administrator, end customer, or a user with an specific role assigned (viewer, requester, purchaser, manager).

Role

A role is assigned to each user that determines what actions they can take, and what HP2B capabilities they have access to. There are six roles: viewer, requester, manager, purchaser, end customer, and customer administrator.

Purchase request

A user assigned the “requester” role place products in their shopping cart for a manager or purchase to approve for purchase.

Purchase order

When a purchase request is approved, it gets turned into a PO, which is sent through the system as a formal purchase.

Workflow

A workflow is a prescribed order in which purchases are requested and approved by users in designated manager or purchaser roles.



Role-based workflow

A role-based workflow is when approval of a purchase is based on the roles of the users.

Cost-based workflow

A cost-based workflow is when approval of a purchase is based upon the cost of the request.

Tier 2 workflow

Two users are needed to approve a purchase request.

Tier 3 workflow

Three users or more are needed to approve a purchase request.

FAQ

1. When is recommended to set a workflow?

Set a workflow if you want to have an automatic approval flow, rather than manually moving a purchase request through the system. You can choose which works best given your specific procurement processes.

2. What types of approval workflows does HP2B have?

You can create approval workflows based on user role (role-based workflow), or the cost of the purchase (cost-based workflow).

3. How long is a purchase request valid?

Unlike a quote, a purchase request does not have a time limit on its validity. However, if products or services on the purchase request are no longer available on HP2B, then the purchase request would have to be recreated.

4. Can you add a new approver to an existing purchase request if the current approver is not available?

Not yet, but in future versions of HP2B, this will be possible.

5. Where can I find my purchase requests?

Under the “My account” section in the top right corner of the navigation menu of HP2B.

6. How do I get notified that I have a purchase request to review?

You should receive an email telling you when you need to review a purchase request.

7. Will the PO have the same name as the purchase request?

Yes, they will be labeled with the same name.

8. Can I see all purchase requests from all organizations in one place?

Yes, you can see all purchase requests when you click on “Purchase requests to approve” from the “Manage account” option in the Home Page.

9. How can I update my personal information at the account level?

You can do this by clicking “My Profile” option in the top right corner in the Home Page.

10. Can I change the user ID of my existing account?

No, you have to request this from your IT department.

11. What are the registration steps from a user perspective (step-by-step)?

This depends on how access is provided by the customer administrator. If the customer administrator clicks on the function “Generate URL,” the system will send a URL to the prospective user by email. By clicking on the link, the user will be walked through the registration steps. Once the user has registered, the customer administrator can approve the user and assign them a role and Order Reporting Access level. If customer administrators click on the function “Add user,” this will prompt them to add users’ details. This directly adds users to H2PB. When new users attempt to log in they will be asked to create passwords. Once this is done, they get immediate access.

12. What does the customer administrator need to specify when they request access for a user?

At the time they approve access for a user, customer administrators need to tell HP2B which country site and catalogs the user has access to. Customer administrators would also assign roles and specify what type of order reporting access the user has at that time.

13. What is the difference between my login ID and email address?

The login ID is your username in HP2B. This username is associated with your email. Most users choose to use their email as their login ID, but that is not required.

14. Is the login ID case sensitive?

Yes, even if you choose to use your email address.

15. What do I do if I forget my password?

On the screen where you are prompted to enter your password is a link to reset it if you’ve forgotten.

16. What do I do if my login doesn’t work?

You can ask for it to be reset. For other issues, contact your HP customer support representative.

