

Overview: This job aid demonstrates how to set customized thresholds for Spartan Marketplace orders within the Finance System. 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. After logging in to EBS (ebs.msu.edu), click on **Finance System**.
2. Under Spartan Marketplace, click on **Order Auto Limit**.

The screenshot shows the EBS Financial Systems Administration interface. At the top, there are navigation tabs for 'Main Menu', 'Maintenance', and 'Administration'. Below these are buttons for 'action list' and 'doc search'. A 'Message Of The Day' banner provides accounting resources. The main content area is divided into two columns of menu items:

- Left Column:**
 - Transactions**
 - Financial Processing**
 - Advance Deposit
 - Auxiliary Voucher
 - Budget Reallocation
 - Cash Receipt
 - Credit Card Receipt
 - Disbursement Voucher
 - Distribution of Income and Expense
 - General Error Correction
 - Indirect Cost Adjustment
 - Internal Billing
 - Intra-Account Adjustment
 - Pre-Encumbrance
 - Transfer of Funds
 - Purchasing/Accounts Payable**
 - Contract Manager Assignment
 - Payment Request
 - Requisition
 - Vendor Credit Memo
 - Administrative Transactions**
 - Capital Asset Builder**
 - Capital Asset Builder AP Transactions
 - Capital Asset Builder GL Transactions
 - Capital Asset Management**
 - Asset Manual Payment
 - Barcode Inventory Process
 - Financial Processing**
 - General Ledger Correction Process
 - Journal Voucher
 - Non-Check Disbursement
 - Service Billing
 - System**
- Right Column:**
 - Lookup and Maintenance**
 - Capital Asset Builder**
 - Pre-Asset Tagging
 - Capital Asset Management**
 - Asset
 - Asset Fabrication
 - Asset Global (Add)
 - Asset Location Global
 - Asset Payment
 - Asset Retirement Global
 - Chart of Accounts**
 - Account
 - Account Global
 - Account Delegate
 - Account Delegate Global
 - Account Delegate Model
 - Account Delegate Global From Model
 - Financial Reporting Code
 - Mission Code
 - Object Code
 - Object Code Global
 - Organization
 - Organization Review
 - Program/Initiative Code
 - Project Code
 - Project Code Import
 - Sub-Account
 - Sub-Account Import
 - Sub-Object Code
 - Sub-Object Code Global
 - Sub-Object Code Import
 - Use of Funds
 - Procurement Card (Pcard)**
 - Procurement Card Maintenance
 - Pcard Transactions
 - Spartan Marketplace** (circled in yellow)
 - Order Auto Limit
 - Vendor**

Presently, users are able to set University Stores order thresholds for fiscal officer approval. This maintenance table will be used to set customizable thresholds (by account number) for workflow routing for all orders placed through Spartan Marketplace.

- To view a full list of the account numbers and their corresponding thresholds, click **Search**. Or, search by the other available parameters.

- Users may click **edit** to change the information of an existing threshold, **copy** to add a new account number, or **create new** by clicking on the button in the top right corner. At this time, it is necessary to add a new account number each time one is created. In the future, it may be possible to enter a threshold by organization number and the workflow threshold would apply to all accounts assigned to it.

264 items retrieved, displaying 1 to 100. [First/Prev] 1, 2, 3 [Next/Last]

Actions	Auto Limit Id	Chart Code	Account Number	Limit Amount	Active Indicator	Last Update Date
edit copy	5301	MS	AM033995	1.00	Yes	08/23/2011
edit copy	5067	MS	AT023445	0.00	Yes	06/17/2011
edit copy	5400	MS	AT100003	0.00	Yes	12/08/2011
edit copy	5381	MS	DA100001	0.00	Yes	12/08/2011
edit copy	5401	MS	DA100002	0.00	Yes	12/08/2011
edit copy	5403	MS	DA100003	0.00	Yes	12/08/2011
edit copy	6881	MS	DE022415	0.01	Yes	03/06/2014
edit copy	6521	MS	DN022333	0.00	Yes	05/24/2013
edit copy	6640	MS	DN022351	0.01	Yes	06/06/2013
edit copy	7223	MS	DN022689	1.00	Yes	06/24/2015
edit copy	7226	MS	DN100004	1.00	Yes	06/24/2015
edit copy	6500	MS	DS021900	0.01	Yes	04/14/2013
edit copy	6880	MS	DS021914	0.01	Yes	03/06/2014
edit copy	5660	MS	DS021945	2,500.00	Yes	06/11/2013
edit copy	5700	MS	DS021946	2,500.00	Yes	06/11/2013
edit copy	5780	MS	DS021947	2,500.00	Yes	06/11/2013
edit copy	5800	MS	DS021948	2,500.00	Yes	06/11/2013
edit copy	5781	MS	DS021949	2,500.00	Yes	06/11/2013
edit copy	5801	MS	DS021950	2,500.00	Yes	06/11/2013
edit copy	5782	MS	DS021951	2,500.00	Yes	06/11/2013
edit copy	5783	MS	DS021952	2,500.00	Yes	06/11/2013
edit copy	5802	MS	DS021953	2,500.00	Yes	06/11/2013
edit copy	5784	MS	DS021954	2,500.00	Yes	06/11/2013
edit copy	5803	MS	DS021955	2,500.00	Yes	06/11/2013
edit copy	5785	MS	DS021956	2,500.00	Yes	06/11/2013
edit copy	5804	MS	DS021957	2,500.00	Yes	06/11/2013
edit copy	5786	MS	DS021958	2,500.00	Yes	06/11/2013
edit copy	5805	MS	DS021959	2,500.00	Yes	06/11/2013
edit copy	5787	MS	DS021960	2,500.00	Yes	06/11/2013
edit copy	5788	MS	DS021961	2,500.00	Yes	06/11/2013
edit copy	5789	MS	DS021962	2,500.00	Yes	06/11/2013

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 Pcard, Open Orders, and University Stores.