MacBuy Approver Guide

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The Approver in MacBuy can review, return, reject or approve a requisition or other form. The Approver can also search and view documents related to requisitions and forms they have approved (i.e. PO, Receipt, Invoice). Approvers can approve via email. Approvers can delegate their approvals to another Approver.

**TIP:** A rejected requisition cannot be resubmitted. Returned requisitions can be corrected and submitted again. Returning requisitions is recommended rather than rejecting them. Reject a requisition only if it should be deleted.

Approvals are routed through work flow that mirrors work flow in Mosaic. The same thresholds apply in MacBuy that apply to all McMaster University purchases. Requisitions on projects will route through the Research Accountant (if under $10,000.00 or on 100% review projects) and then the P.I.

**IMPORTANT!!** Delegation of Approvers can be managed by the Approver (i.e. during vacation) so ordering does not slow down or halt during an Approver’s absence. A delegate Approver can be assigned for a single day, a set date range, or long term. Instructions can be found at end of this guide (beginning on page 23).

Approvers are notified by email as well as within MacBuy on the Notifications toolbar. Approvers can approve by email as well as within MacBuy.

See also:

- MacBuy User Profile Guide for customizing user profile processes.
- MacBuy Receiving Guide for how to receive non catalogue orders.
- MacBuy Approving via Email Guide for email approval process.
- MacBuy Approving with an Ad Hoc approver for inserting an approver.
To approve in MacBuy:

Log into Mosaic.

Select the MacBuy tile (either on Home Screen or My Work screen).

On the MacBuy home screen, click on the **notification flag** in the Notification toolbar, upper right hand portion of screen. Items requiring approval appear in the Notification toolbar in the flagged section. There will be a number beside the flag if there are any approvals to be done.

**TIP:** First time users may not see a number beside the flag, even if a requisition is awaiting approval.
This Approver has 9 requisitions awaiting approval, as shown in the Notification toolbar and in the drop down menu. If there were Forms or Supplier Set Up/Change Requests to be approved, there would be additional lines listing those approval requests, see example below.

Click on the **Requisitions** hyper link.

If nothing is waiting to be approved, there will not be a number in the Notification toolbar and nothing in the drop down menu, above.

**TIP:** To simply approve a requisition, it does NOT have to be assigned to the approver. If a comment or note or action other than approval is required, assign the requisition to yourself.
Approvals can also be found by clicking on Documents on the Navigation toolbar on left side of Home screen.

**Documents>Approvals>My Approvals** (above).

The search can be modified. Document type, date range (or specific date) and the addition of another approver are all managed under this search.

Once the search parameters are defined, any documents requiring approval will be found.
Expand the folder containing the requisitions waiting to be approved by clicking the grey arrow to the left of the folder, above.

**TIP:** Folders are created for department/program and/or project.

The listing of all approvals will show, as below.

All requisitions needing to be approved are now showing.

The requisition number is the blue hyper link in the left hand column, above.
Select **Assign** at the line by checking the box, far right, on each line. Then **Assign** in drop down menu. **Go.**

**TIP:** When **Approvers** assign documents to themselves, they cannot be edited any further by **Requester** before being **Approved.**

Until a requisition has been Assigned to an Approver, it can be pulled back by the Requester to be edited. Assigning a requisition/form to an Approver means it can no longer be edited. Fewer options are available to the Approver until the requisition/form has been Assigned to them. An approval can be done without assigning the requisition/form to the approver. Assigning requisitions/forms is recommended.
Click the box at the requisition line, far right, beside the Assign button.

Click the GO button, upper right, beside the Assign button.

The requisition will be assigned to the Approver in a separate screen.

To assign an entire list of requisitions check the Action box then click Assign button.

All items in the list will be marked and then assigned to the approver.
In the Notification toolbar, click on the Action Flag then click on the **Requisitions To Approve** hyperlink. The requisitions are now in the "**My Assigned Approvals**" line.

Note that the **Assign** button is now greyed out on the requisition line because the requisition has already been assigned to the approver.

Click on requisition number hyperlink to review details and attachments.

**TIP:** This is very important! In order to approve a requisition, it should be reviewed along with any attachments to avoid errors or duplicate purchases. Click into the requisition using the hyperlink to thoroughly review before approving.
Once the requisition is reviewed and if there are no issues requiring corrections, it can be approved.

**TIP:** More options are now available once the approver is inside the requisition.

Select **Approve/Complete & Show Next** if there are further requisitions to approve.

**TIP:** This brings the next requisition onto the screen without the extra steps of navigating back to the approval list screen to select the next item.

Click **Go** button to have next requisition brought onto screen for approval.

Continue until all approvals are done.
Rejecting or denying only part of a requisition:

If an item (line) is wrong or should not go through approvals, the Approver can reject just the individual line, not the entire requisition. The rest of the requisition will still continue through work flow.

Give a detailed reason for the rejection and any further action required. Click **Reject Line Item** button once reason is given.
The rejected line is still on the requisition, indicated with a red `X`. It will not be included in the Purchase Order sent to the supplier.

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keurig K130 Single-Cup In-Room Coffee Brewer KEURIG B130 BREWER</td>
<td>75-213000</td>
<td>EA</td>
<td>106.34</td>
<td>1 EA</td>
<td>106.34 CAD</td>
</tr>
<tr>
<td>Cuisinart Stainless-Steel 4-Slice Toaster STAINLESS STEEL 4 SLICE TOASTR</td>
<td>CPT-435C</td>
<td>EA</td>
<td>133.50</td>
<td>1 EA</td>
<td>133.50 CAD</td>
</tr>
</tbody>
</table>

Notice that line 1 amount is not included in the total on the requisition now that it has been rejected.

$133.50 + $56.90 = $190.40
Once all approvals are completed, the Notification toolbar will no longer have a number beside the flag.

The bell icon notifies the user of “action required” items, which are different than approval actions. For example, returned requisitions or forms, or invoices needing a receipt.

**TIP:** If your main role in MacBuy is as Approver, set the home page to the approval screen. Navigate to the Approvals screen (Documents>Approvals>My Approvals) then click user name in the Notifications toolbar. The drop down menu contains the option **Set My Home Page**.
To approve via Email

Approvers are set up with a default on their profile to receive email notifications when there is something with them to be approved.

Requisitions may be approved via email, even if received on a smart phone.

Email notifications contain details of the requisition such as requisition number, items ordered, catalogue numbers, pricing and quantity ordered, Commodity Code, VAT Treatment (i.e. HST applicable), Business Unit and chart field string being charged, other approvers (if any) and Shipping address. Attachments (both internal and external) can also be viewed in the email.

The **Take Action** button gives the Approver further action options such as Return to Requester or Reject Requisition.

Example of email notification for a requisition needing approval is below.
Requisition details (i.e. items, quantity, cost, chart field string) are in the body of the email.
Review and then click **Take Action** button.
Click on sideways arrows to left of subject to further review information.
Review **Shipping** and **Billing** information.

Click on down arrow to left of subject to minimize information shown after being reviewed.
Accounting Codes

Business Unit:
   MAC01 : McMaster University

Fund:
   20 : Operating Fund

Account:
   600001 : Materials & Supplies

Department:
   10383 : FA Accounts Payable

Program:
   30000 : Generic

PCBU:
   -

Project:
   -

Project Activity:
   -

Analysis Type:
   -

Resource Type:
   -

Complete chart field string information is listed, above.
If there are any attachments, they can be viewed through the email, by a link provided. See below.
Any other approvers in this “pool” will be displayed.

**TIP:** Only one approver in a pool needs to approve.

**TIP:** Assign requisitions to give the **Approver** more options in handling the approval.
A pop up box confirms the approval has been assigned to the approver.
Success

Requisition has been Approved successfully!
MacBuy Approval Delegation Process

Documents>Approvals>Assign Substitute Approvers
Select **Assign Substitute Approvers**

For all approvals, check **Assign** box then click green **Assign Substitute to All Requisition Folders** button.

Delegation can be for all approvals or by Form type.
Search for name of delegate approver.
Check “Include Date Range for Substitution”.
Select the name of the person to approve in your absence.

**TIP:** Follow McMaster University policies regarding delegation of approvals (AP01) when selecting appropriate Delegate. The guide can be found under Financial Services on the McMaster University site,


**TIP:** The Approver is still responsible for any actions by their delegate approver.
Select the date range to cover absences, holidays, etc.
Confirm Delegate and dates are correct.

Click on **Assign** button.

In this example Susan Graci has delegated approvals to Terri Wetton for the period from May 10 2019 to May 31 2019.
To cancel a delegation before the specified end date, see below.

Documents>Approvals>Assign Substitute Approvers

Check the box beside the green **Remove** button.

Click the green **“End Substitute for All Requisition Folders”** button.

This effectively removes the delegation for all types of approvals.

For further assistance, please contact [MacBuyHelp@mcmaster.ca](mailto:MacBuyHelp@mcmaster.ca)