



Approver Manual

February 2020



WWW.LIBERTY.EDU
TRAINING CHAMPIONS FOR CHRIST SINCE 1971

Table of Contents

I.	Approval Email and Notifications	3
II.	Approving Carts within a Workflow	4
A.	Email Notification	4
B.	Approving Carts Within buyLU.....	5
1.	Action Items.....	5
2.	Documents.....	6
3.	Sort by	6
4.	Filter My Approvals.....	7
III.	Moving a Requisition to My Approvals	7
IV.	Reviewing a Requisition	9
V.	Approving a Requisition.....	10
A.	Quick Approvals	10
B.	Standard Approvals	10
VI.	Rejecting a Requisition	11
A.	Reject Selected Items	12
VII.	Adding a Comment to a Requisition.....	14
VIII.	Returning a Requisition to the Requestor.....	18
IX.	Add Notes to History.....	20
X.	Returning a Requisition back to the Shared Queue.....	21
XI.	My Recent Approvals	21
XII.	Reports	22

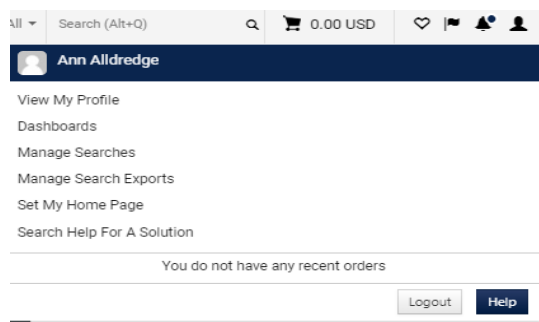
Approving Orders

Once a Requestor submits a cart into workflow, an Approver will need to approve or reject items in that cart or the entire requisition.

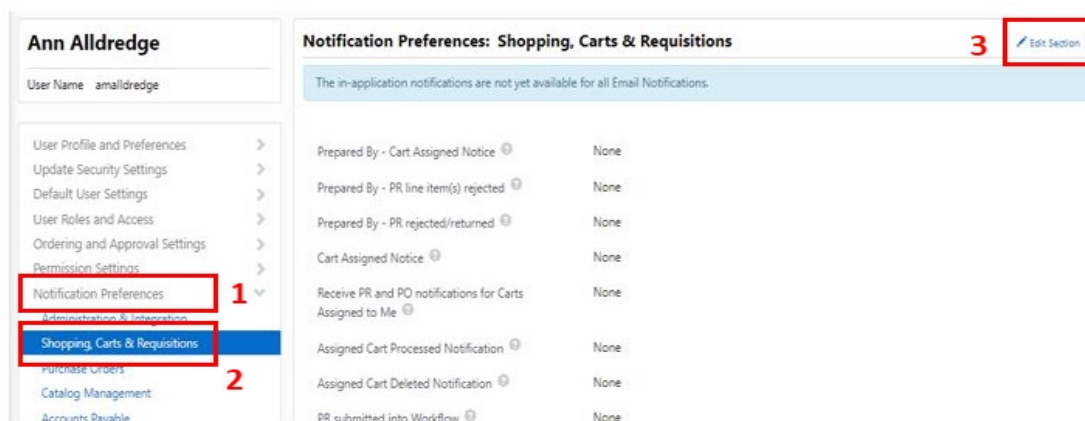
If part of a requisition is rejected the remaining items continue in the process. Comments and attachments can be sent back and forth between Approvers and Requestors during the approval process.

I. Approval Email and Notifications

By default buyLU is set for the user to not receive notifications of documents pending approval. Access this feature from [View My Profile](#).



1. Select Notification Preferences
2. Select Shopping, Carts & Requisitions
3. Select Edit Section



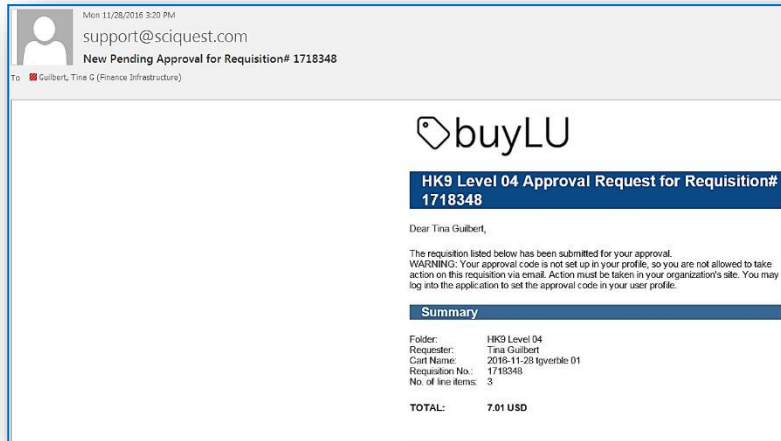
Choose PR pending Workflow approval, Override, then select either Email, Notifications (within buyLU), or both Email & Notification.

PR pending Workflow approval ?	<input type="radio"/> Default	<input checked="" type="radio"/> Override	None
PR Workflow Notification available ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	None
PR Workflow complete / PO created ?	<input checked="" type="radio"/> Default	<input type="radio"/> Override	Email
			Notification
			Email & Notification

II. Approving Carts within a Workflow

A. Email Notification

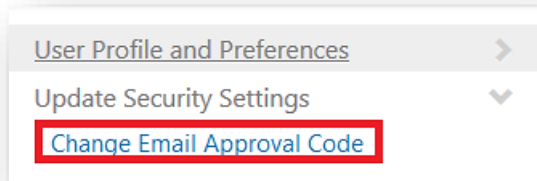
Once the email notification setting is updated, the Approver will receive an email notification alerting them there is a requisition needing their approval. The Approver can access the approvals screen within buyLU by clicking the [View Requisition Approvals](#) link provided within the body of the email.



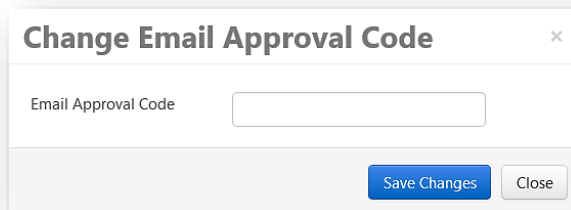
[View Requisition Approvals](#)

Approvers also have the option to approve a requisition **within the email notification**. In order to do so they will need a 4-digit approval code. This is set up within the Approver's profile.

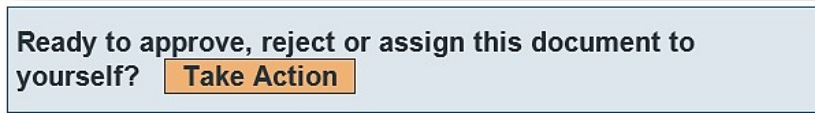
Within the profile go to “[Update Security Settings](#)” – “[Change Email Approval Code](#).”



Enter a pin number of his or her own choosing and [Save Changes](#).



When the email notification arrives it will contain this box:



You will be able to approve, reject, or assign the document from within the email notification by clicking “[Take Action](#)” and using your pin number.



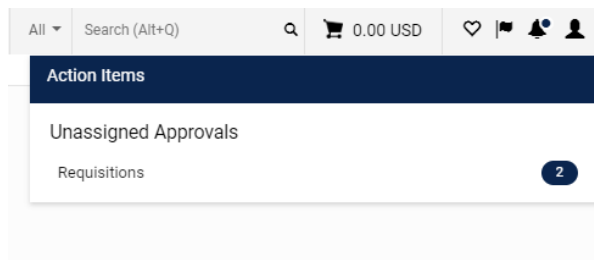
Note: *This option is not available on the test site.*

B. [Approving Carts Within buyLU](#)

1. Action Items

Within the buyLU site, the Approver can view requisitions pending approval from the home/shop tab notice the Action Items link.

Click the [Action Items Notifications](#)



link. The Approver can view how many approvals are currently waiting in the queue for approval.

2. Orders

The approver can also find the requisitions needing approval by clicking the **Orders** icon on the main navigation ribbon, then **Approvals** and **Requisitions to Approve**.



The section at the top of the screen is the **My Approvals** queue. When a document is in this queue, the Approver owns it.

Total Results Found: 2

All Dates Assign Go

Sort by: Submit date newest first

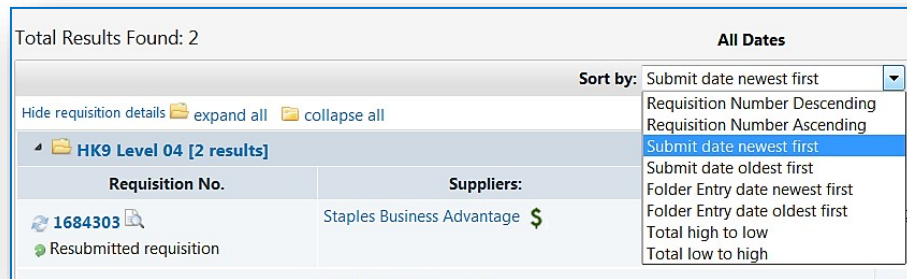
Hide requisition details expand all collapse all Results per folder: 20

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	Approve
Resubmitted requisition						
Requisition Name		2016-10-12 jwilson7 01		Folders 0 Days in folder [My PR Approvals]		
No. of line items		1		0 Days in folder [HK9 Level 04]		
My PR Approvals [1 result]						
HK9 Level 04 [2 results] ← SHARED QUEUE						
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	Assign
Resubmitted requisition						
Requisition Name		2016-10-12 jwilson7 01		Folders 0 Days in folder [My PR Approvals]		
No. of line items		1		0 Days in folder [HK9 Level 04]		

Shared queues can be accessed by one or more Approvers and are displayed **under** the My PR Approvals queue. The actual queue that displays for an Approver is dependent on what they are responsible for approving.

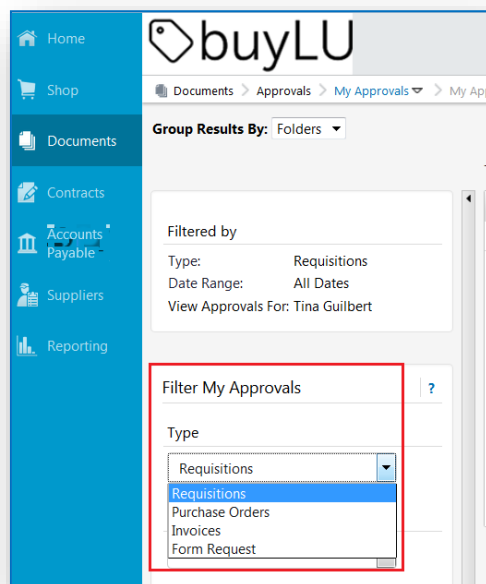
3. Sort by

The Approver can use the **Sort by** option at the top of the screen to sort approvals.



4. Filter My Approvals

The Approver can also filter approvals by type using the **Filter My Approvals** option.



III. Moving a Requisition to My Approvals

Some requisitions requiring review automatically go to your approvals queue. If an approval step is *shared* by more than one person, the document is assigned to the approval queue and an Approver must move the requisition into their queue to review. As items are assigned from the shared queue to the My Approvals, the **Assign** button changes to **Approve**. When the Approver approves/rejects requisitions from their My Approvals queue, they leave both queues.

Look for a requisition in the shared queue. Notice in the **Action** column the requisition is currently “Not Assigned”. To the right of that requisition, click the **Assign** button. This moves the requisition to My Approvals. The document is now in **My PR Approvals** queue.

Total Results Found: 2 All Dates Assign Go

Sort by: Submit date newest first Results per folder: 20

Hide requisition details expand all collapse all

My PR Approvals [1 result]							
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action	<input type="checkbox"/>
1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	Approve	<input type="checkbox"/>
Resubmitted requisition							
Requisition Name		2016-10-12 jlwilson7 01		Folders 0 Days in folder [My PR Approvals]			
No. of line items		1		0 Days in folder [HK9 Level 04]			
HK9 Level 04 [2 results]							
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action	<input type="checkbox"/>
1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	Assign	<input type="checkbox"/>
Resubmitted requisition							
Requisition Name		2016-10-12 jlwilson7 01		Folders 0 Days in folder [My PR Approvals]			
No. of line items		1		0 Days in folder [HK9 Level 04]			
1707553	Amazon.com Corporate Credit	Not Assigned	11/28/2016 8:50 AM	Tina Guilbert	20.61 USD	Assign	<input type="checkbox"/>
Requisition Name		2016-11-11 tgverble 01		Folders 0 Days in folder [HK9 Level 04]			
No. of line items		1					

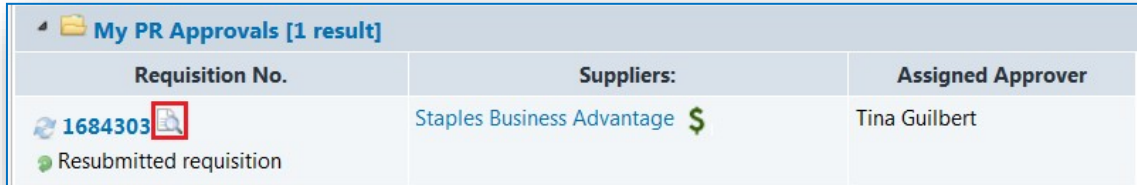
To move multiple requisitions, click in the **checkbox** for each requisition. From the Apply Action to Selected PR action box, select **Assign** and click **Go**.


Once the requisitions have been assigned, the queue displays with the Approver handling the review.

My PR Approvals [1 result]							
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action	<input type="checkbox"/>
1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	Approve	<input type="checkbox"/>
Resubmitted requisition							
Requisition Name		2016-10-12 jlwilson7 01		Folders 0 Days in folder [My PR Approvals]			
No. of line items		1		0 Days in folder [HK9 Level 04]			

IV. Reviewing a Requisition

An Approver can review all the details of a requisition. From **My PR Approvals**, select the “quick view” icon the right of the requisition number.



Requisition No.	Suppliers:	Assigned Approver
1684303  Resubmitted requisition	Staples Business Advantage \$	Tina Guilbert

This brings up a quick view of the requisition where the Approver can either approve the requisition or open the requisition for more detail.



Requisition Summary 1684303			
	General	Shipping	Billing
Status	Pending Financial Approval Level 4 (Tina Guilbert)	Ship To Attr: Justin Wilson MSC Code 1900 12th Street Lynchburg, VA 24501 United States	Bill To Liberty Univ Accounts Payable, MSC Box #710305 1971 University Blvd Lynchburg, VA 24515 United States
Submitted	11/28/2016 9:23 AM		
Cart Name	2016-10-12 jwilson7 01		
Description			
Business Unit	Administration (MBU019)		
Home Department	Finance Infrastructure (IH1005)		
			Billing Options

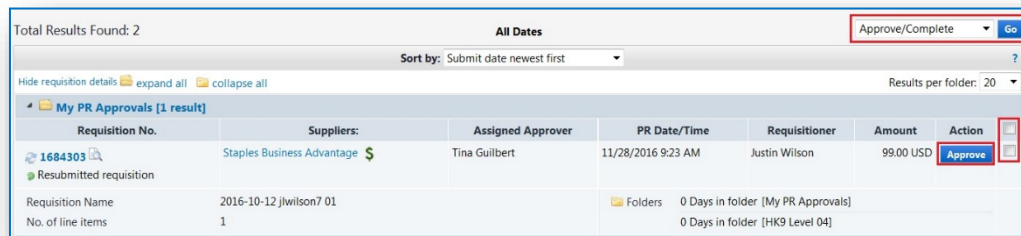
Once the requisition is open, the Approver should review the **Internal Notes and Attachments** and **the External Notes and Attachments** sections to review the comments.

V. Approving a Requisition

There are several ways to approve a requisition.

A. Quick Approvals

If you are familiar with the contents of a requisition, you may not need to open it before approving it. ***This is not a recommended practice***; however, if you are certain the requisition is correct you can assign it to your queue and click the **Approve** button. To approve multiple requisitions, once they are assigned to your queue, click the **checkbox** for each requisition and using the **Assign** dropdown menu, select **Approve/Complete** and click **Go**. The requisitions are approved and an email is sent to the Requestor.



Total Results Found: 2

All Dates

Sort by: Submit date newest first

Hide requisition details expand all collapse all

Results per folder: 20

My PR Approvals [1 result]

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1684303	Staples Business Advantage \$	Tina Guilbert	11/28/2016 9:23 AM	Justin Wilson	99.00 USD	Approve
Resubmitted requisition						
Requisition Name			2016-10-12 jwilson7 01			
No. of line items			1			

0 Days in folder [My PR Approvals]

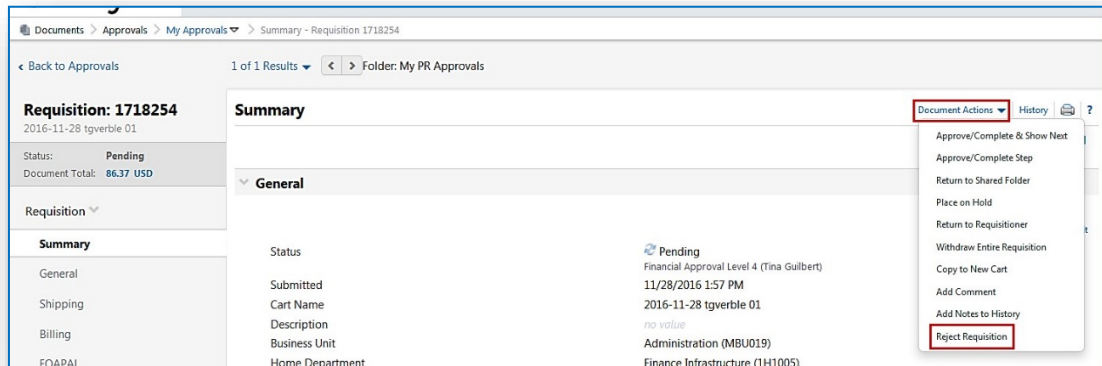
0 Days in folder [HK9 Level 04]

B. Standard Approvals

Standard approvals require the Approver to open the order and review the information. Once the items are reviewed, the Approver will scroll to the top of the requisition and in the **Assign** dropdown menu and select **Approve/Complete Step** and click **Go**. The requisition is approved and an email is sent to the Requestor.

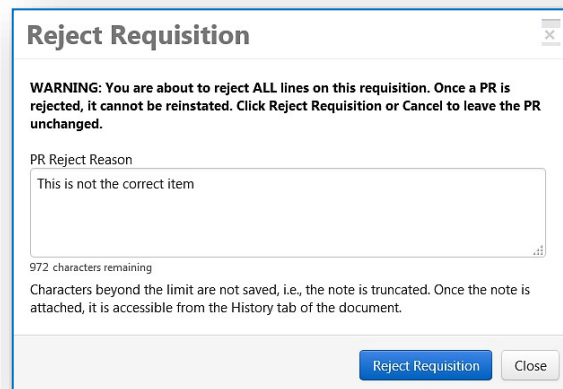
VI. Rejecting a Requisition

Click the [requisition number](#) link to open the requisition. Once you decide the entire requisition is to be rejected, from the Document Actions action box at the top, select [Reject Requisition](#) and click [Go](#).



Rejecting a requisition will open a warning box.

Enter the reason for the rejection in the [Reject Requisition](#) dialog box and click the [Reject Requisition](#) button. The requisition is removed from the [my PR Approvals](#) queue and the Requestor will receive an email notifying them of the rejection along with the rejection reason.



A. Reject Selected Items

Click the [requisition number](#) link to open the requisition. Click in the [Checkbox](#) to the right of the line item you need to reject.

Scroll to the Supplier/Line Item Details section. In the [Selected Line Item Actions](#) box, select [Reject Selected Items](#) and click [Go](#).

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 BIC Cristal Stick Ballpoint Pens, Medium Point, 1.0 mm, Black Ink / Clear Barrel, 12/Pk	BICMS11BK	DZ	1.95	1 DZ	1.95 USD

The Reject Line Item dialog box opens allowing the Approver to enter a reason for rejecting. It is recommended that you enter the reason for rejecting so it will be included in the email to the Requestor as well as remain with the history of the requisition. Click the [Reject Line Item](#) button.

Reject Line Item

Reject Line Reason

This item was ordered previously

968 characters remaining

[Reject Line Item](#) [Close](#)

Return to the top of the screen. In the Document Actions action box, select **Approve/Complete Step**. This action will approve the requisition and reject the selected item.

The pending requisition leaves **My PR Approvals** queue and continues through PR Approvals.

VII. Adding a Comment to a Requisition

Comments can be added to a requisition. Doing so provides a way for Approvers to communicate to the Requestor and allows additional documentation to be attached if needed. Comments differ from internal notes in that comments can be replied to. Comments are always available even if a requisition is in workflow and even after the PO is issued. An email notification can be sent when the Add Comment feature is being used. Internal notes become part of the requisition and are visible on the requisition and they also display in the History tab.

- Open the requisition.
- Click **Comments**.
- Click the **Add Comment** button or from the **Document Actions** action box, select **Add Comment**.

Documents > Approvals > My Approvals > Summary - Requisition 1718282

< Back to Approvals 1 of 2 Results < > Folder: My PR Approvals

Requisition: 1718282
2016-11-28 jwilson7 02

Status: **Pending**
Document Total: **4.34 USD**

Requisition ▾

Summary

- General
- Shipping
- Billing
- FOAPAL
- Internal Notes and Attach...
- Payment Information
- Prepaid/Deposit Information
- External Notes and Attach...
- Supplier Information
- Taxes, Shipping & Handling

Comments

Summary

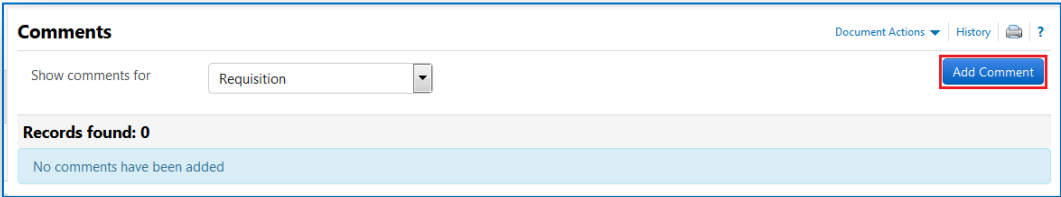
▼ **General**

- Status
- Submitted
- Cart Name
- Description
- Business Unit
- Home Department
- Requester
- Include justification for NSF order
- Reason for NSF request
- Multi Year Indicator
- Paid on PCard
- Buyer Name

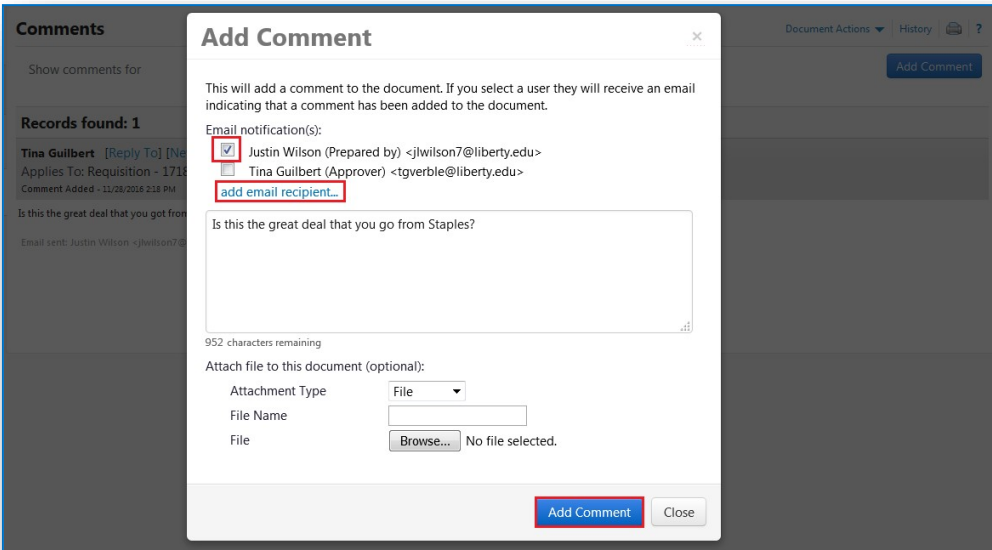
▼ **Shipping**

Ship To

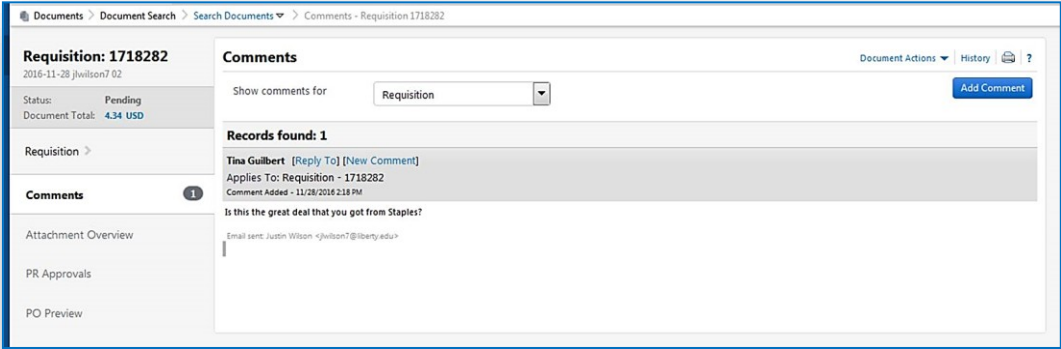
The Add Comment dialog box displays.



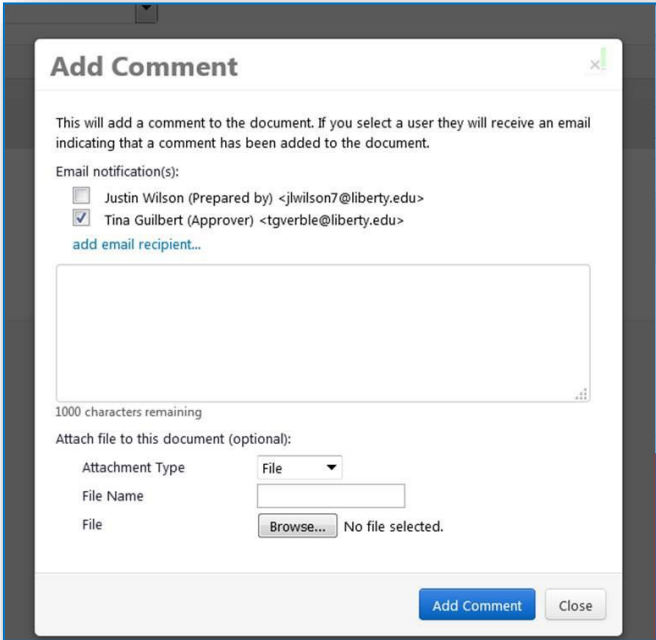
Select the individual to receive the email notification. If the recipient is not listed, click the **add email recipient** link. The User Search box displays. Search for the person you need to communicate with. Enter the text or attach a file and click the **Add Comment** button. The recipient will receive an email.



The email recipient(s) receives the message. The receiver(s) click on the link provided in the email which brings them directly to the comment tab for that requisition.



Click on the [Reply To](#) link, add additional comments or attach files.



When a file is attached via the Comment tab, it displays in the Internal Notes and Attachments section of the requisition. It becomes an active link – click on the link to display the information.

Requisition: 1718282
2016-11-28 jwilson7 02

Status: **Pending**
Document Total: **4.34 USD**

Requisition ▾

- Summary
- General
- Shipping
- Billing
- FOAPAL
- Internal Notes and Attac...**

Internal Notes and Attachments

Internal Note: no note

Internal Attachments

Add Attachments

Icon.5A130D87.C95... (3,599k)

Bank Code: E
BB&T ePayables Bank Account

Lines

Staples Business Advantage

All correspondence is also recorded in the History tab of the requisition.

Notes and Attachments History

History - Requisition 1718282 - Liberty University

Click to filter history ? Export CSV

Results Per Page: 20 Records found: 11

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To
	11/28/2016 2:28 PM	Tina Guilbert		Comment Added			
	11/28/2016 2:28 PM	Tina Guilbert		Attachment Added	Internal Attachments	empty	Icon.5A130D87.C956.4889.8698.E616D7A6

Ext. Price: 4.34 USD

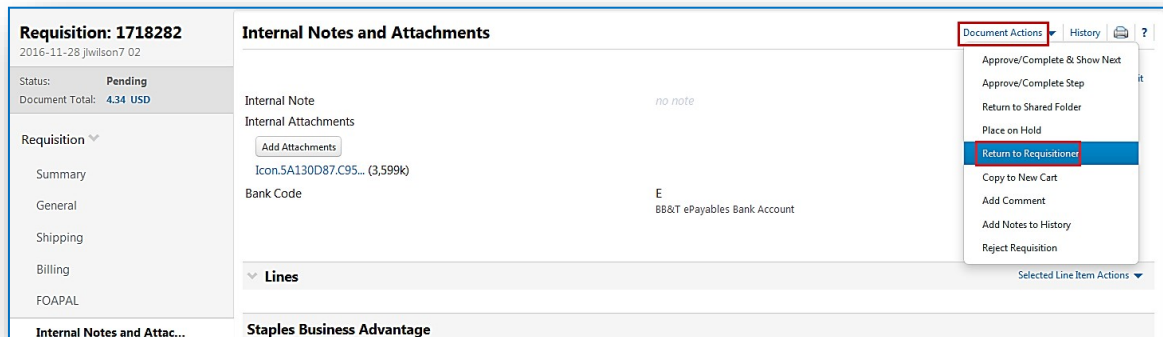


Note: Remember to be professional as External notes and comments are visible to vendors.

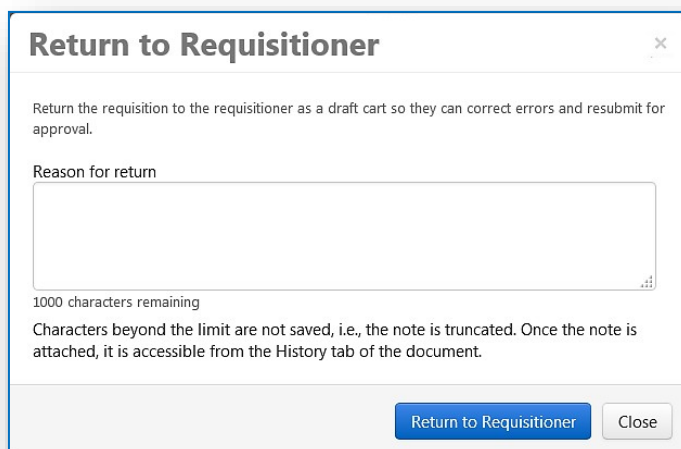
VIII. Returning a Requisition to the Requestor

Occasionally an Approver may need to return a requisition to the Requestor for updates to custom fields or line details. This allows Approvers to return instead of rejecting a requisition. When a requisition is returned, it becomes a draft cart and is no longer visible as a requisition via history. The returned requisition is updated by the Requestor and resubmitted into workflow and all previous approval information and comments will be available via History. The returned requisition will restart workflow from the beginning regardless of the step it was returned from.

Open the requisition. From the Document Actions box, select **Return to Requestor**.

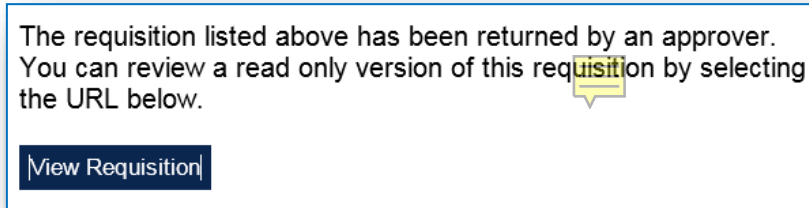


This will open up a new dialog box for the Approver to document the reason the requisition was returned.



Once the reason is documented click the [Return to Requisitioner](#) button.

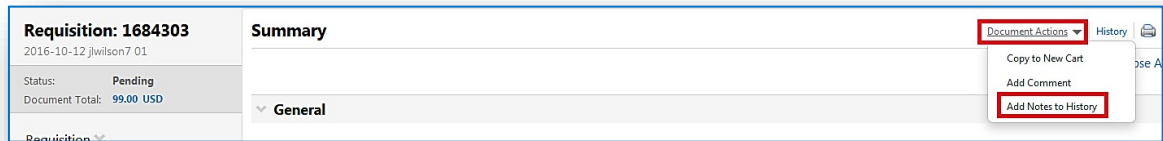
The Requestor will receive an email notifying that their cart was returned.



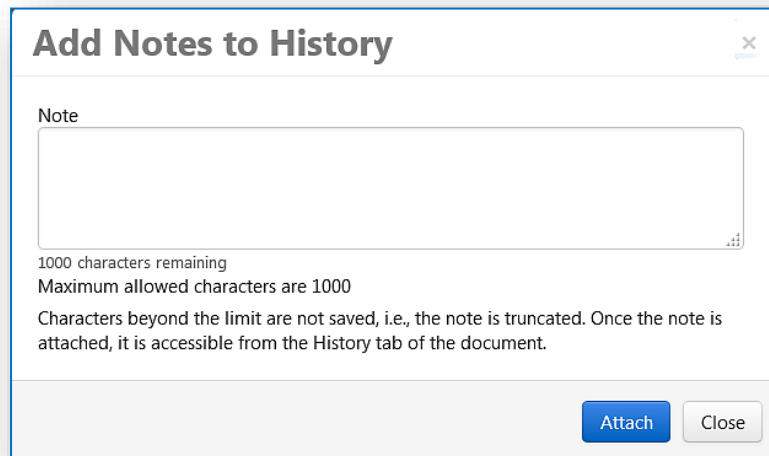
IX. [Add Notes to History](#)

An approver has the ability to add notes regarding a requisition, directly to history. History notes do not generate an email but they do display in the comments tab as well.

From the Document Actions action box, select [Add Notes to History](#).



The Add Notes to History dialog box displays. Add the appropriate text regarding this requisition and click the [Attach](#) button.



The note becomes part of this requisition history and can be viewed by clicking the History tab.

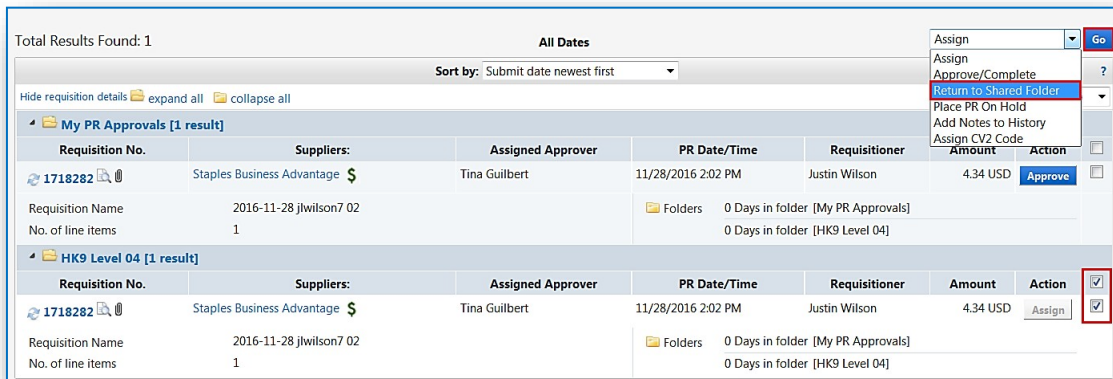
Click to filter history ? Export CSV

Results Per Page: 20 Records found: 17 Page 1 of 1 ?

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	11/28/2016 10:42 AM	Tina Guilbert		Requisition note added				This is a note for training purposes.
	11/28/2016 9:24 AM	System	Banner Budget Authorization	Requisition approved				

X. Returning a Requisition back to the Shared Queue

An approver may realize they are not going to get to all the PR's they assigned to themselves and need to return them back to the shared queue. To do this, click in the **checkbox** to the right of the requisition line. From the Apply Action to Selected PR(s) select **Return to Shared Folder** and click **Go**.



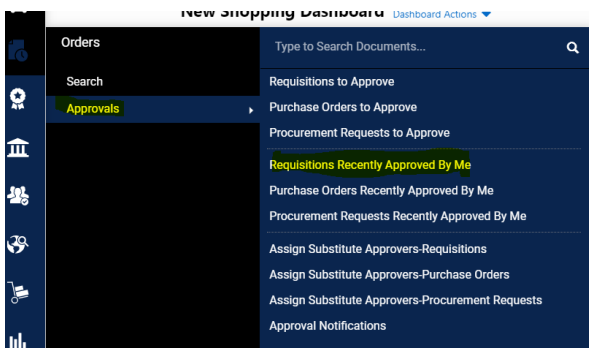
The screenshot shows a table of requisitions. The first section is titled "My PR Approvals [1 result]" and contains one requisition with ID 1718282. The second section is titled "HK9 Level 04 [1 result]" and also contains one requisition with ID 1718282. A context menu is open over the second requisition, with the "Return to Shared Folder" option highlighted. The menu also includes options like "Assign", "Approve/Complete", "Place PR On Hold", "Add Notes to History", and "Assign CV2 Code".

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1718282	Staples Business Advantage \$	Tina Guilbert	11/28/2016 2:02 PM	Justin Wilson	4.34 USD	Approve
Requisition Name		2016-11-28 jwilson7 02		Folders		0 Days in folder [My PR Approvals]
No. of line items		1		Folders		0 Days in folder [HK9 Level 04]
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1718282	Staples Business Advantage \$	Tina Guilbert	11/28/2016 2:02 PM	Justin Wilson	4.34 USD	Assign
Requisition Name		2016-11-28 jwilson7 02		Folders		0 Days in folder [My PR Approvals]
No. of line items		1		Folders		0 Days in folder [HK9 Level 04]

XI. My Recent Approvals

buyLU allows you to view the orders that you specifically reviewed.

From the **Orders** icon on the navigation ribbon, select the **Approvals** submenu, then **Requisitions Recently Approved by Me**. This feature allows the Approver to quickly have a snapshot of what orders they have processed. Use the Click to filter requisitions link if you wish to filter further.

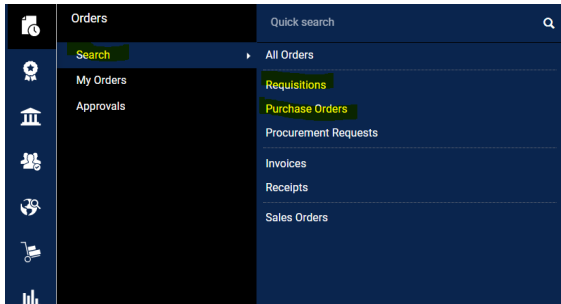


The screenshot shows the navigation ribbon with the "Orders" icon selected. The "Approvals" submenu is open, showing options like "Requisitions to Approve", "Purchase Orders to Approve", "Procurement Requests to Approve", "Requisitions Recently Approved By Me", "Purchase Orders Recently Approved By Me", "Procurement Requests Recently Approved By Me", "Assign Substitute Approvers-Requisitions", "Assign Substitute Approvers-Purchase Orders", "Assign Substitute Approvers-Procurement Requests", and "Approval Notifications".

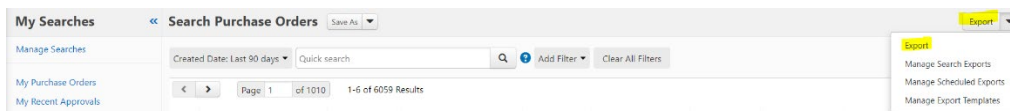
Requisition Number	My Action	Workflow Step	Approval Date/Time	Suppliers	Prepared For	Requisition Total
1718254	Requisition returned	Financial Approval Level 4	11/28/2016 2:40 PM	Staples Business Advantage	Tina Guilbert	86.37 USD
1707553	Requisition approved	Financial Approval Level 4	11/28/2016 11:49 AM	Amazon.com Corporate Credit	Tina Guilbert	20.61 USD
1684303	Requisition approved	Financial Approval Level 4	11/28/2016 11:49 AM	Staples Business Advantage	Justin Wilson	99.00 USD

XII. Reports

Document searches can be exported in buyLU. To export a document search use the navigation ribbon and choose **Orders**, then **Search**, then **Choose which type of Document to Search**. Choose the criteria than you need and click Search.



To Export your search criteria Select Export on the top right of page, pick type of export.



You will receive an email when report if finished running.

Re: Search Result Export Complete -
screen_requisition_search_ama1ldredge1710256978.xlsx

Dear Ann Alldredge,

The search result export you requested is now complete. You may view the export results by selecting the URL below:

[View Export](#)

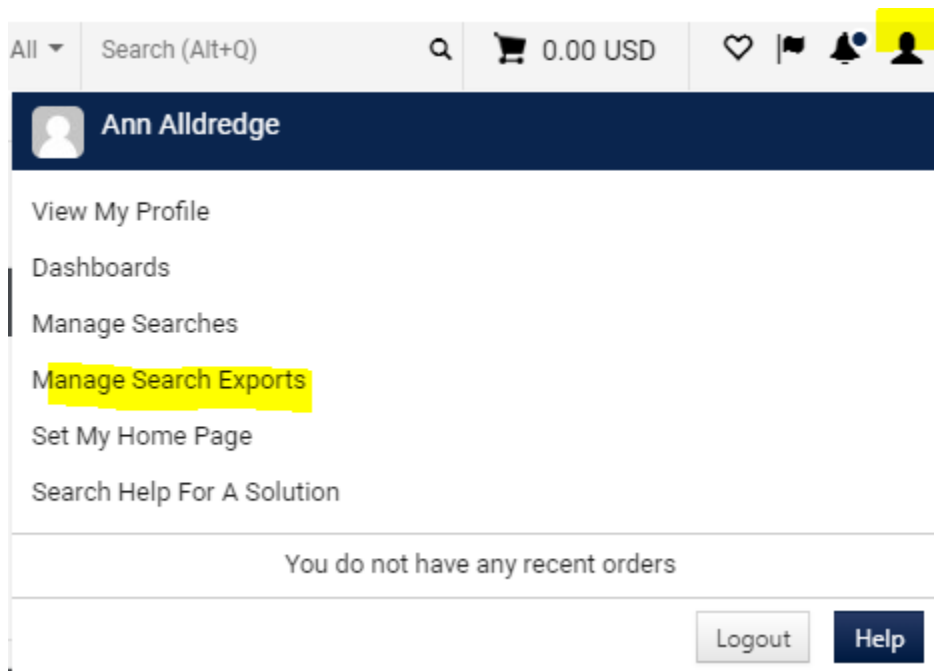
If you have any questions with regard to this export, please contact your SelectSite Support Team.

Support Team Contact Information:
+1 434-592-3012

Thank you,
Liberty University
null

To find Export:

- Click on your profile in the top right.
- Select Manage Search Exports



- Click on the Export request

Manage Exports

Export Requests Export Schedules Export Templates

[Click to Filter](#)

Title	Status	Search Type	Export Output	Created
Export request for Requisition	Completed	Requisition	Screen Layout (Excel)	3/13/2020 8:02

- Then open the report.