Approver Guide

This guide will review how to review and approve requisitions and expenses.

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Logging In

1. Open your web browser. Chrome, Firefox, Safari, and Edge are recommended. Internet Explorer is also fine as long as it’s the most recent, updated version.
2. Log into Xavier Web Intranet and find the link to XavierBuy on the Employee Hub, under systems. 

   https://www.xavier.edu/employees/systems

   OR

3. In the address field, type https://xavier.unimarket.com.
4. The XavierBuy login page will appear.
5. Enter your Xavier University username and password and login.

If you experience any issues logging in, please contact procurement@xavier.edu.

Approval Process

Once buyers create requisitions, they are routed for approval based on the Xavier University FOAPL information and any special Accounts or Commodity’s in the requisition. Email notices are sent to the approvers as their actions are required. If action is not taken within 24 hours from the first notice, a reminder email will be sent. If no action is taken within 72 hours of the approval task, the approval will be escalated to the next approver with authority to take the approval action. If the approver is the last in the approval chain and the 72 hours have passed, the requisition will wait for the approver to act.

The approval routing will be based on FOAPL string for each line item on the requisition along with the subtotal of the requisition. Approvers in an approval chain are assigned an approval Level, designating the dollar amount they have the authority to approve in Banner. If a requisition is for a dollar amount larger than the Approver’s approval level, the approval will continue up the chain until a user with enough authority approves the requisition.

Approval Notifications

Email Notifications

You will receive an email from xavierbuyapproval@xavier.edu notifying you of the approval task requiring you to take action. An example of the email that will be received is shown below. The link in the notification email will take you directly to approval tasks view.
If another individual within your approval group has responded to the approval request, you will receive another email notifying you that your approval is no longer needed. An example of this type of email is shown below.
Notifications in XavierBuy
You will know that you have approvals waiting for your review when a red number appears next to Tasks in the menu bar of XavierBuy.

In addition to the Task menu alerts you will have a quick view window for approvals on your Dashboard that will show the 4 most recent requisitions awaiting your approval.

Clicking the Approvals menu, the Dashboard Approvals or the View All approvals link in the quick view window will take you to the Approvals page. The Approvals page will display all your outstanding approval actions as well as additional Unavailability and Proxy settings.
Approval Page

Requisition Approval Overview
The approval page will display all outstanding approvals in your tasks with the requisition number, buyer’s name, supplier, order type, and total. Because you have received the accounting and line detail in your email notification, you may be informed enough to utilize the Approve/Decline option from this page. You can also change the Approval State search filter to view any approvals that you have already taken action on, approved or declined.

Approve/Decline Window
The Approval button to the far right, next to the Actions button of the requisitions will open a window where you can Approve or Decline the requisition and enter a comment for either action that is recorded in the approval history.
Unavailability / Proxy Settings
To set yourself as unavailable and/or assign a proxy approver**, click the Change Availability link to have the Change Availability window appear. In the Change Availability window, check the box to indicate that you are unavailable, select the date/times that you will be unavailable from and to. You can also assign a proxy approver to take the approval actions while you are unavailable. You will still receive the approval notifications and can take action even if you are marked as unavailable. The proxy user will also receive the notification and be able to take the same action as delegated by you assigning them as your proxy. **IMPORTANT – The proxy approver must be another existing, authorized XavierBuy approver from your Department that meets the University’s Delegation of Authority guidelines. Contact Procurement for assistance.

Once you set your unavailability, you will see a confirmation message until you become available again.

⚠️ You are currently NOT available until 4/3/2020 11:59 PM and will not receive any approval requests. Approvals will be sent to your proxy Nancy Downing.
Requisition View

Actions
The requisition view as an approver will present two actions at the top right corner of the page, Approval and Actions. Within the Actions menu you will have the ability to Copy the requisition or Edit the requisition.

Approval will open the Approve/Decline window just like the Approvals page option shown above.

Editing a requisition while in the approval process will allow you as an approver to edit the below details of the requisition.

- Ship To and Bill To addresses for the requisition
- Add or delete Attachments
  - Justification Attachments stay internal and will not be sent to the supplier
  - Order Attachment will be sent to the supplier by default but can be selected to not be sent
- Edit notes
  - Justification notes are for internal use and will not be visible to the supplier
  - Delivery Notes are sent to the supplier on the purchase order
- Xavier University FOAPL
  - Editing the FOAPL may change the routing of the approval
  - When you edit any of the FOAPL values, the budget check will be performed again to ensure that the buyer has the proper authority for the new FOAPL in Banner.

Once you have completed your edits or additions to the requisition, you need to click the Save button at the bottom of the screen to finalize the updates.
Approval History
Click the Approvals tab on the Requisition to view the approval history. The approval history shows all past approval actions and upcoming approvals needed before the requisition becomes a PO. The approval history is shown to anyone who has the ability to view the requisition.

The approval history shows the following information.

- Approval Chains name and routing basis
- Approver or approval group
- The task Created Date - date/time that the approval task was originated for the approver(s)
- Task Completed Date – date/time that the approval task was completed by the approver
- Level – authorization level for the approver(s)
- Reason – any comment entered by the approver when task was completed
- Action taken will display at the far right displaying if the action was Approved, Skipped, Escalated or Declined
Comments on Requisitions
The comments feature on requisitions allows both buyers and approvers to post comments and be automatically alerted by email. This saves valuable time in those situations when approvers have questions around the need for an item or require more specifics relating to a product or service.

A comment from an approver will send an email alert to the buyer and a comment from the buyer will send an alert email to the current approver. All past and future approvers will be able to view the comments on the requisition within the Comments tab.

Expense Reimbursement Approvals
Once a user creates an expense reimbursement, they are routed for approval based on the Xavier University FOAPL information and any special Accounts or Commodity’s in the expense claim. Email notices are sent to the approvers as their actions are required. If action is not taken within 24 hours from the first notice, a reminder email will be sent. If no action is taken within 72 hours of the approval task, the approval will be escalated to the next approver with authority to take the approval action. If the approver is the last in the approval chain and the 72 hours have passed, the requisition will wait for the approver to act.

The approval routing will be based on FOAPL string for each line item within the expense claim along with the subtotal of the claim. Approvers in an approval chain are assigned an approval Level, designating the dollar amount they have the authority to approve in Banner. If a requisition is for a dollar amount larger than the Approver’s approval level, the approval will continue up the chain until a user with enough authority approves the requisition.

Notifications in XavierBuy
You will know that you have approvals waiting for your review when an Approver receives an email notification, or a red number appears next to Tasks in the menu bar of XavierBuy.
In addition to the Task menu alerts (just like with Requisitions) you will have a quick view window for approvals on your Dashboard that will show the 4 most recent approvals awaiting your review.

**Expense Claim View**
From either the Task Menu or the Approvals screen and approver will need to select a specific Expense Claim to review. The Expense Claim as seen below will provide the approver with the “Name”, “Description”, who created the claim, that status of that claim and a pdf “Summary” version that can be viewed. If any Unimarket Forms were created and required as part of the expense claim for answering additional questions; those will also be available for the approver to review. They will be within the pdf Summary and will also be available to view on the individual expense.
Once you have reviewed the Expense Claim and are ready to approve or decline, the Approver clicks on the “Approval” button in the top right corner and a pop up window will appear.

If the Expense Claim is going to be declined, the Approver must provide a reason to the end user notifying them why it was declined so they can correct the claim and resubmit.
Actions Menu

Within the Expense Claim the three “…” represent the “Action” menu within Unimarket. From the “Action” menu the Approver has the ability to “Edit” the Expense Claim or if an edit has been made to the FOAPL information, the Approver can “Refresh Approvals” so the claim is then routed to the appropriate Approver responsible for approving the claim based on the new FOAPL information.

Approval History

Approvers, just like the submitter of the Expense Claim will also have the ability to view the Approval History. To do so they simply need to click on “App History” of each expense line to see approval routing process for that specific line item and also the approval history from previous approvers for the claim in question.

Individual Line Items; Approve / Decline

Approvals for an Expense Claim can be done at the Header level or at the Individual line level. However, the entire expense claim must have each line with an approved or declined status before it can be submitted for reimbursement. To approve an individual line item the Approver navigates to the expense line in question and selects the “App/Dec” option on the far ride side of the line item.
Editing an Expense Claim

To Edit an Expense Claim, the approver would go to the Action menu ("...") and select “Edit”. Approvers can edit the “Claim Name”, the “Claim Description”, provide any attachments that might have been left off by the submitter. The approvers can also edit specific line items and the details of those line items including the FOAPL information that was entered. The only thing an approver cannot edit is the “Amount” that was entered for the claim line item. If any portion of the FOAPL information is edited, the approver can select the “Refresh Approvals” option to reroute the Expense Claim to the appropriate approver.
Expense Duplication Warnings

The “Expense Duplication Warning” is indicated by a triangle with an exclamation point saying “Warning” as seen below. This warning is designed to notify the Approver and the Submitter that the Expense Claim is similar to another that has the same submitter, the same expense type, the same date, similar money amounts and a different claim.

<table>
<thead>
<tr>
<th>Claim</th>
<th>Expense</th>
<th>State</th>
<th>Supplier</th>
<th>Amount</th>
</tr>
</thead>
</table>

Refresh Approvals

The approvals for a specific Expense Claim can be refreshed if changes to the approval process have been made by an administrator or if an Approver has edited any portion of the FOAPL information that was entered for a specific claim line item. To refresh the approvals the Approver can either click on the “Refresh Approval” option on the far right side of the specific claim line item, or the Approver can go to the “Actions” menu (“…” ) and select “Refresh Approvals”.