



# 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 **Shopper** Guide for shopping processes.
- MacBuy **Requester** Guide for submission processes.
- 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).

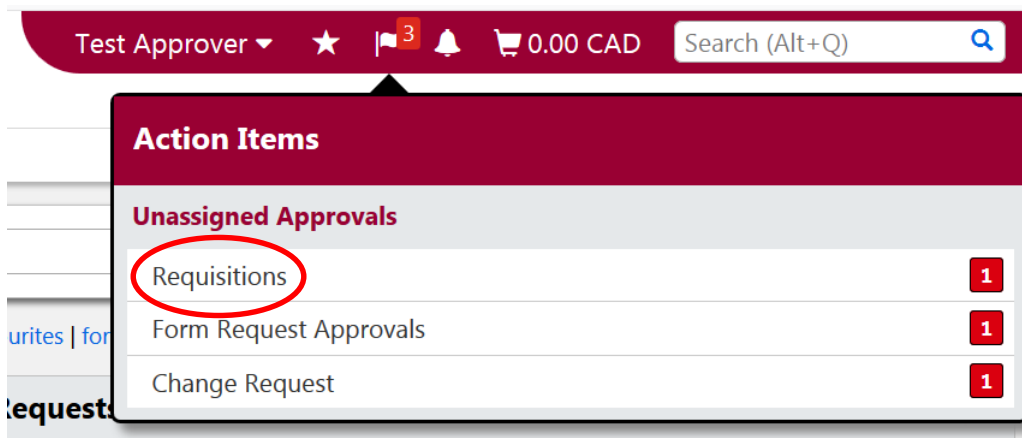
On the MacBuy home screen, click on the **notification flag** in the Notification toolbar, upper right hand portion of screen. Items requiring approval appear in the Notification toolbar in the flagged section. There will be a number beside the flag if there are any approvals to be done.

**TIP:** First time users may not see a number beside the flag, even if a requisition is awaiting approval.

The screenshot shows the MacBuy web application interface. On the left is a dark red vertical navigation menu with icons and labels for Home, Shop, Documents, Contracts, Accounts Payable, and Reporting. The main content area has a white background. At the top right, a dark red notification toolbar is circled in red, containing the text "TEST APPROVERS" with a dropdown arrow, a star icon, a notification bell icon with a red "9" badge, a shopping cart icon with "0.00 CAD", and a search bar with "Search (Alt+Q)" and a magnifying glass icon. Below the toolbar is a search bar with "Shop" and "Everything" dropdowns, a "Go" button, and links for "advanced search", "favourites", "forms", "discount", and "Browse: suppliers". A welcome message box on the left says "WELCOME to MacBuy, McMaster's new on-line purchasing system." and provides contact information. The main content area is divided into two sections: "Forms &amp; Special Requests" and "Lab Supplies". The "Forms &amp; Special Requests" section contains six buttons: "New Catalogue Form", "Limited Tendering Form", "PO Change Order Request Form", "Quick Quote", "New/ Update Supplier Request", and "New / Update Independent Contrac...". The "Lab Supplies" section contains six buttons with logos for "BIO-RAD", "Fisher Scientific", "ThermoFisher Scientific formerly Life", "PerkinElmer", "QIAGEN", and "SIGMA-ALDRICH".



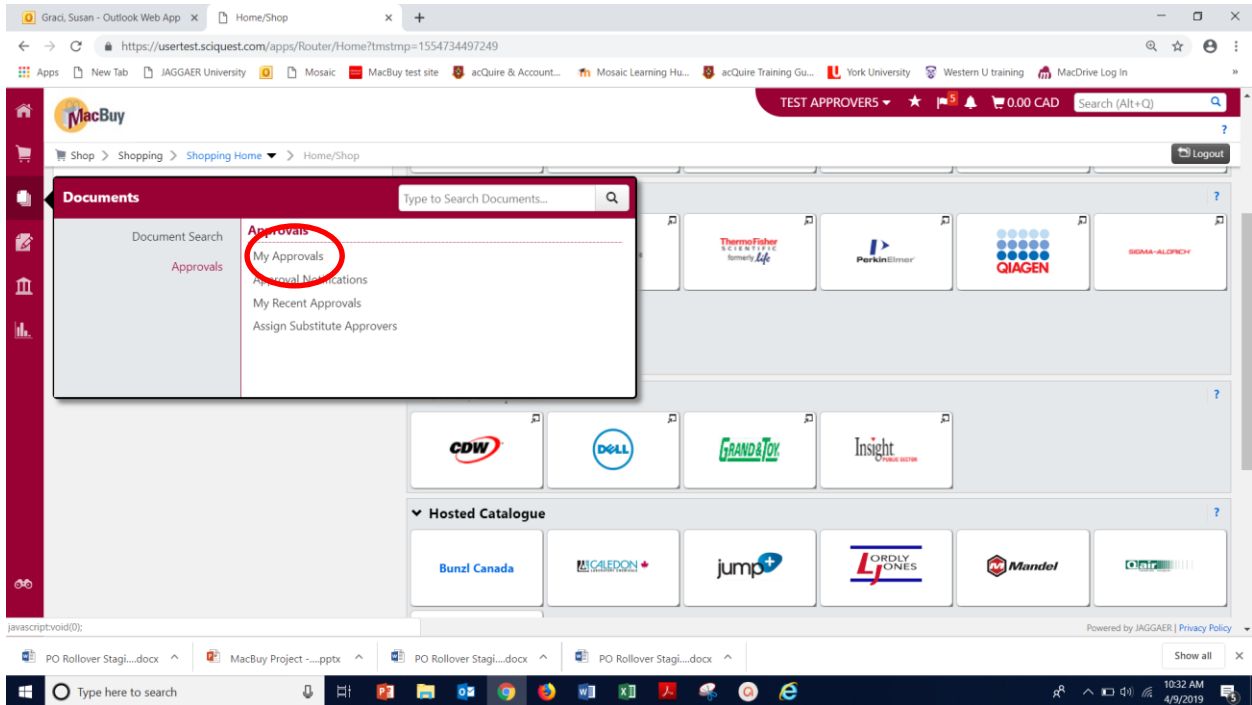
This Approver has **9** requisitions awaiting approval, as shown in the Notification toolbar and in the drop down menu. If there were Forms or Supplier Set Up/Change Requests to be approved, there would be additional lines listing those approval requests, see example below.



Click on the **Requisitions** hyper link.

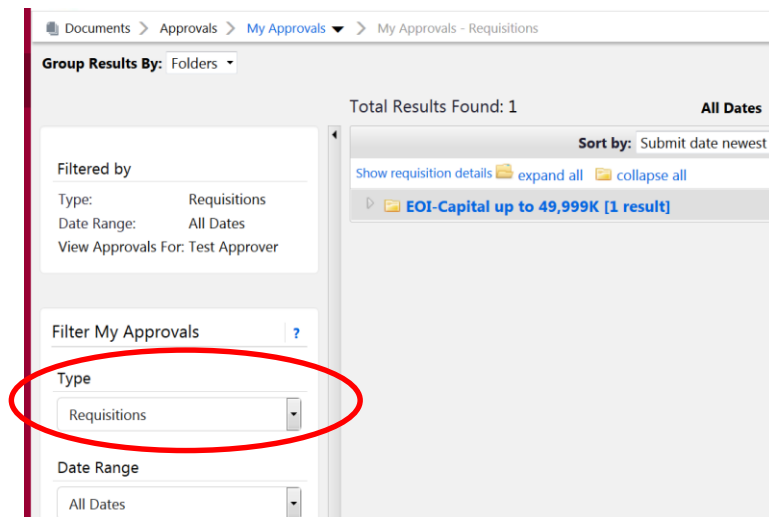
If nothing is waiting to be approved, there will not be a number in the Notification toolbar and nothing in the drop down menu, above.

**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.

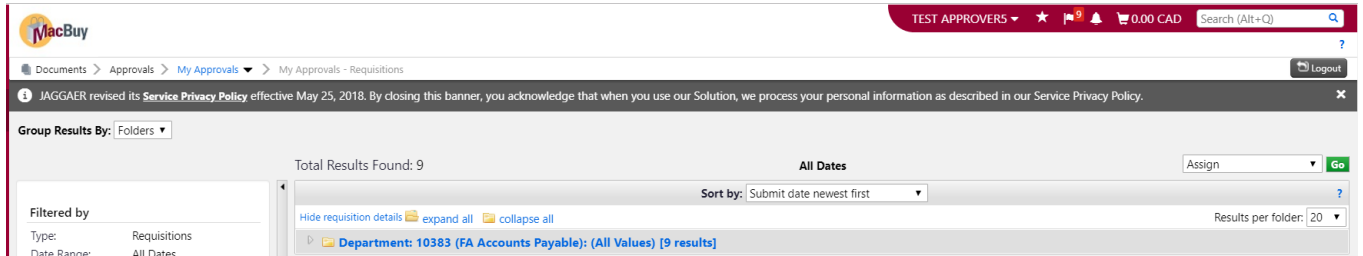
**Documents>Approvals>My Approvals** (above).



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.

The screenshot shows a detailed list of requisitions. The table has columns for Requisition No., Suppliers, Assigned Approver, PR Date/Time, Requisitioner, Amount, and Action. The first row is circled in red, highlighting the requisition number '2525367'.

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
<a href="#">2525367</a>	Caledon Laboratories Ltd Jump Plus Stores ULC	Not Assigned	4/4/2019 9:14 AM	Test Shopper	1,970.57 CAD	<a href="#">Assign</a>
	Requisition Name: SHS Kari 01/21/19 No. of line items: 3		Folders	1 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		
<a href="#">2585916</a>	Grand & Toy	Not Assigned	3/14/2019 12:42 PM	Susan Graci	6,437.60 CAD	<a href="#">Assign</a>
	Requisition Name: 2019-03-14 gracis 03 No. of line items: 1		Folders	21 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		
<a href="#">2585653</a>	Jump Plus Stores ULC	Not Assigned	3/14/2019 8:50 AM	Susan Graci	1,863.99 CAD	<a href="#">Assign</a>
	Requisition Name: 2019-03-14 gracis 02 No. of line items: 1		Folders	22 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		
<a href="#">2522531</a>	Grand & Toy	Not Assigned	3/8/2019 2:11 PM	Susan Graci	17.76 CAD	<a href="#">Assign</a>
	Requisition Name: 2019-01-17 gracis 05 No. of line items: 1		Folders	27 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		
<a href="#">2510270</a>	A-TECH INSTRUMENTS LTD WESTDALE FLORISTS	Not Assigned	3/8/2019 2:06 PM	Susan Graci	193.21 CAD	<a href="#">Assign</a>
	Requisition Name: 2019-01-03 gracis 01 No. of line items: 2		Folders	27 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		
<a href="#">2478933</a>	Mandel Scientific Company Inc.	Not Assigned	3/4/2019 1:31 PM	Susan Graci	32.54 CAD	<a href="#">Assign</a>
	Requisition Name: 2018-11-28 gracis 01 No. of line items: 1		Folders	31 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		
<a href="#">2569669</a>	Grand & Toy	Not Assigned	3/1/2019 3:17 PM	Sharon Ralph	108.56 CAD	<a href="#">Assign</a>
	Requisition Name: Shared with KW and SG No. of line items: 1		Folders	34 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		
<a href="#">2569608</a>	Grand & Toy	Not Assigned	3/1/2019 2:43 PM	Sharon Ralph	24.95 CAD	<a href="#">Assign</a>
	Requisition Name: 2019-03-01 ralpsh No. of line items: 1		Folders	34 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		
<a href="#">2567774</a>	Grand & Toy	Not Assigned	2/28/2019 1:49 PM	Susan Graci	6,437.60 CAD	<a href="#">Assign</a>
	Requisition Name: 2019-02-28 gracis 11		Folders	35 Days in folder (Department: 10383 (FA Accounts Payable): (All Values) )		

All requisitions needing to be approved are now showing.

The requisition number is the blue hyper link in the left hand column, above.

Total Results Found: 9

All Dates

Sort by: Submit date newest first

Hide requisition details expand all collapse all

Department: 10383 (FA Accounts Payable): (All Values) [9 results]

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner		
2525367	Caledon Laboratories Ltd Jump Plus Stores ULC	Not Assigned	4/4/2019 9:14 AM	Test Shopper	1,970.57 CAD	<input type="checkbox"/> Assign
Requisition Name SH5 Kari 01/21/19		Folders 1 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]				
No. of line items 3						
2585916	Grand & Toy	Not Assigned	3/14/2019 12:42 PM	Susan Graci	6,437.60 CAD	<input type="checkbox"/> Assign
Requisition Name 2019-03-14 gracis 03		Folders 21 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]				
No. of line items 1						
2585653	Jump Plus Stores ULC	Not Assigned	3/14/2019 8:50 AM	Susan Graci	1,863.97 CAD	<input type="checkbox"/> Assign
Requisition Name 2019-03-14 gracis 02		Folders 22 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]				
No. of line items 1						
2522531	Grand & Toy	Not Assigned	3/8/2019 2:11 PM	Susan Graci	17.76 CAD	<input type="checkbox"/> Assign
Requisition Name 2019-01-17 gracis 05		Folders 27 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]				
No. of line items 1						
2510270	A-TECH INSTRUMENTS LTD WESTDALE FLORISTS	Not Assigned	3/8/2019 2:06 PM	Susan Graci	193.21 CAD	<input type="checkbox"/> Assign
Requisition Name 2019-01-03 gracis 01		Folders 27 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]				
No. of line items 2						

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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.

MacBuy

TEST APPROVERS

Documents > Approvals > My Approvals > My Approvals - Requisitions

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Group Results By: Folders

Total Results Found: 7

All Dates

Sort by: Submit date newest first

Results per folder: 20

Department: 10383 (FA Accounts Payable): (All Values) [7 results]

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2525367	Caledon Laboratories Ltd Jump Plus Stores ULC	Not Assigned	4/4/2019 9:14 AM	Test Shopper	1,970.67 CAD	Assign
Requisition Name SH5 Kari 01/21/19 No. of line items 3 Folders 1 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]						

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.

Total Results Found: 7

All Dates

Sort by: Submit date newest first

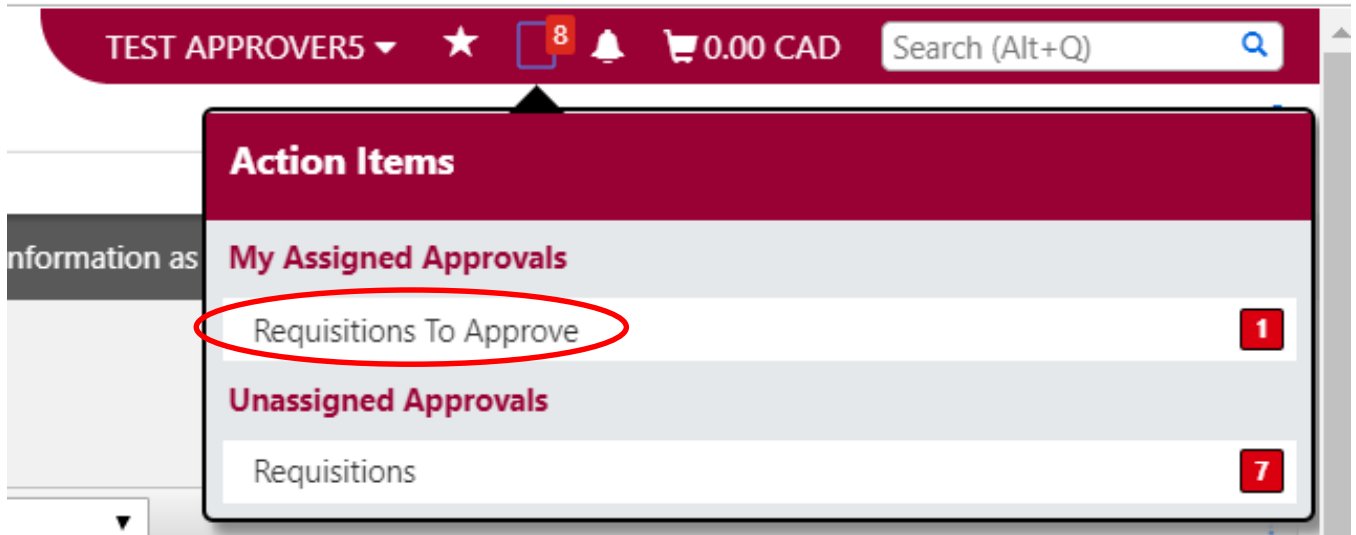
Results per folder: 20

Department: 10383 (FA Accounts Payable): (All Values) [7 results]

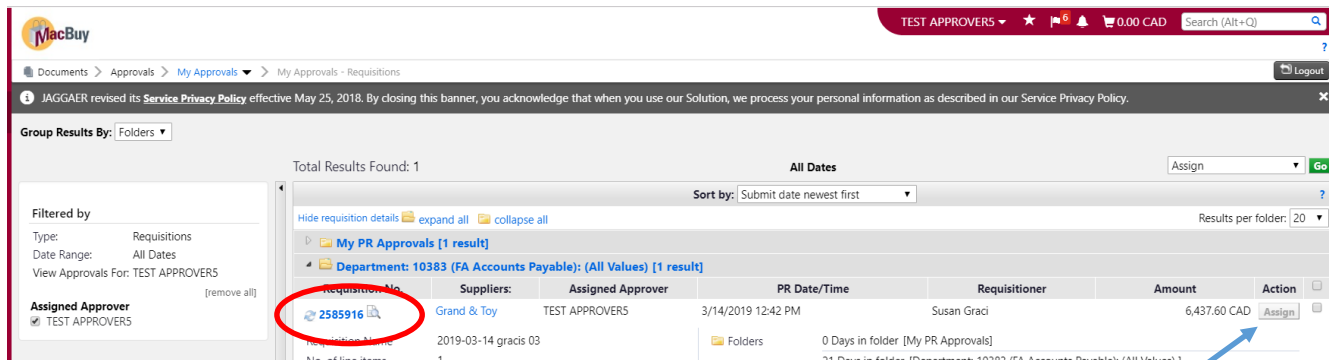
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
2613991	Grand & Toy	Not Assigned	4/10/2019 12:35 PM	Katherine Jones	77.55 CAD	Assign
Requisition Name 2019-04-05 jonesk Test No. of line items 4 Folders 0 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]						
2618721	Jump Plus Stores ULC	Not Assigned	4/9/2019 12:42 PM	TEST APPROVERS	3,764.09 CAD	Assign
Requisition Name 2019-04-09 APPROVERS 01 No. of line items 1 Folders 0 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]						
2618628	Grand & Toy	Not Assigned	4/9/2019 10:46 AM	TEST REQUESTERS	120.16 CAD	Assign
Requisition Name 2019-04-09 testing email notification No. of line items 1 Folders 1 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]						
2585916	Grand & Toy	Not Assigned	3/14/2019 12:42 PM	Susan Graci	6,437.60 CAD	Assign
Requisition Name 2019-03-14 gracis 03 No. of line items 1 Folders 26 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]						
2585653	Jump Plus Stores ULC	Not Assigned	3/14/2019 8:50 AM	Susan Graci	1,863.99 CAD	Assign
Requisition Name 2019-03-14 gracis 02 No. of line items 1 Folders 27 Days in folder [Department: 10383 (FA Accounts Payable): (All Values)]						

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** hyper link. 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.

MacBuy

TEST APPROVERS

Documents > Approvals > My Approvals > Summary - Requisition 2585916

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< Back to Approvals 1 of 1 Results Folder: Department: 10383 (FA Accounts Payable): (All Values)

Requisition Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

Hide header

General	Shipping	Billing
Status: Pending Department Manager (TEST APPROVERS)	Ship To: ATTN: Susan Graci BLDG/ROOM: ETB 205 1280 Main St. West MCMMASTER-WEST CAMPUS RECV Hamilton, ON L8S 4M3 Canada	Bill To: McMaster University - Accounts Payable 1280 Main Street West OJIN Room 321 Hamilton, ON L8S 4L8 Canada
Submitted: 3/14/2019 1:42 PM Cart Name: 2019-03-14 gracis 03 Description: no value Prepared by: Susan Graci Blanket/Service Order: x Purchasing BU: MAC01	Delivery Options: Expedite: x Requested Delivery Date: no value	Billing Options: Accounting Date: 3/14/2019

Business Unit	Fund	Account	Department	Program	PCBU	Project	Project Activity	Analysis Type	Resource Type	Open Item
MAC01	20	650000	10383	30000	no value	no value	no value	no value	no value	no value
McMaster University	Operating Fund	Travel - General	FA Accounts Payable	Generic						

Approve/Complete & Show Next

Approve/Complete & Show Next

Approve/Complete Step

Return to Shared Folder

Place on Hold

Return to Requisitioner

Forward to ...

Copy to New Cart

Add Comment

Add Notes to History

Reject Requisition

Action options are listed here. Note that there are more options available once a requisition/form has been assigned to the approver (see page 6).

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:

Supplier / Line Item Details

Hide line details

**Grand & Toy** [more info...](#)  
Fulfillment Address 1 [Edit](#)  
Po Box 5500, Don Mills, ON M3C 3L5 CA

[Add discount for this supplier...](#)

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)  
Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 4/5/2019 1:39:00 PM  
Line(s): 1, 2, 3

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 <a href="#">Keurig K130 Single-Cup In-Room Coffee Brewer KEURIG B130 BREWER</a> <a href="#">more info...</a>	75-21300	EA	106.34	1 EA	106.34 CAD	<input checked="" type="checkbox"/> <a href="#">edit</a>

Supplier Part Auxiliary ID: 80691087  
Commodity Code: 52140000 Domestic appliances  
HST Registered Supplier (Do Not Change):   
Delivered To: Ontario  
Tax Treatment to Apply: Normal HST Rebate

Internal Note: no note  
Internal Attachments: [Add Attachments](#)  
External Note: no note  
Attachments for supplier  
PO Clauses: no clause

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.

### Reject Line Item

Reject Line Reason

example of rejecting one line in a multi line requisition

943 characters remaining

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

Give a detailed reason for the rejection and any further action required.

Click **Reject Line Item** button once reason is given.

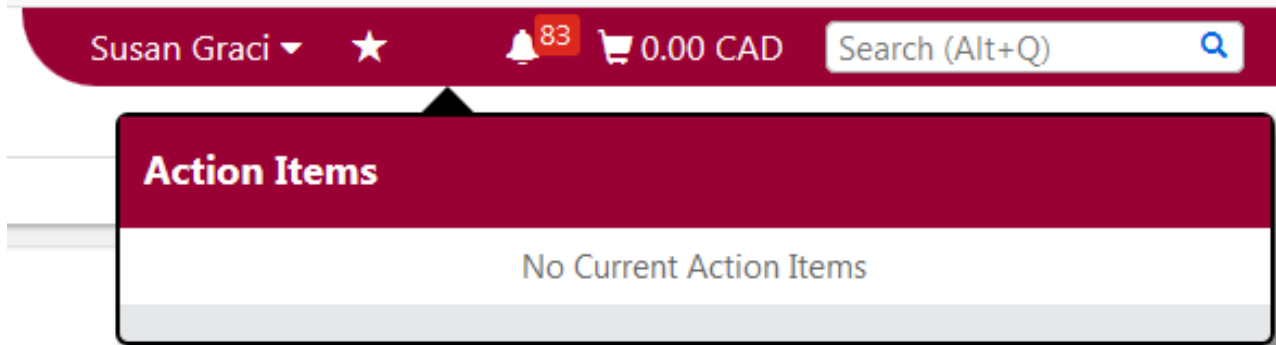
<b>Grand &amp; Toy</b> <a href="#">more info...</a>		PO Number		To Be Assigned	
Fulfillment Address 1 Po Box 5500, Don Mills, ON M3C 3L5 CA		Quote number		<i>no value</i>	
<a href="#">Add discount for this supplier...</a>		<a href="#">View/edit by line item...</a>			
The item(s) in this group was retrieved from the supplier's website. <a href="#">What does this mean?</a> Need to make changes? <a href="#">VIEW ITEMS</a> Item(s) was retrieved on: 4/5/2019 1:39:00 PM Line(s): 1, 2, 3					
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 <b>X</b> Keurig K130 Single-Cup In-Room Coffee Brewer KEURIG B130 BREWER <a href="#">more info...</a>	75-21300	EA	106.34	1 EA <a href="#">Add discount...</a>	106.34 CAD
Supplier Part Auxiliary ID <a href="#">more info...</a>	80691087	Commodity Code 52140000 Domestic appliances	Internal Note Internal Attachments	<i>no note</i>	
		HST Registered Supplier (Do Not Change) Delivered To Tax Treatment to Apply	External Note Attachments for supplier	<i>no note</i>	
		Ontario Normal HST Rebate	PO Clauses	<i>no clause</i>	
2 <b>C</b> Cuisinart Stainless-Steel 4-Slice Toaster STAINLESS STEEL 4 SLICE TOASTER <a href="#">more info...</a>	CPT-435C	EA	133.50	1 EA <a href="#">Add discount...</a>	133.50 CAD
Supplier Part Auxiliary ID <a href="#">more info...</a>	80691087	Commodity Code 52140000 Domestic appliances	Internal Note Internal Attachments	<i>no note</i>	
		HST Registered Supplier (Do Not Change)	External Note	<i>no note</i>	

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.

1 <b>X</b> Keurig K130 Single-Cup In-Room Coffee Brewer KEURIG B130 BREWER <a href="#">more info...</a>	75-21300	EA	106.34	1 EA <a href="#">Add discount...</a>	106.34 CAD
Supplier Part Auxiliary ID <a href="#">more info...</a>	80691087	Commodity Code 52140000 Domestic appliances	Internal Note Internal Attachments	<i>no note</i>	
		HST Registered Supplier (Do Not Change) Delivered To Tax Treatment to Apply	External Note Attachments for supplier	<i>no note</i>	
		Ontario Normal HST Rebate	PO Clauses	<i>no clause</i>	
2 <b>C</b> Cuisinart Stainless-Steel 4-Slice Toaster STAINLESS STEEL 4 SLICE TOASTER <a href="#">more info...</a>	CPT-435C	EA	133.50	1 EA <a href="#">Add discount...</a>	133.50 CAD
Supplier Part Auxiliary ID <a href="#">more info...</a>	80691087	Commodity Code 52140000 Domestic appliances	Internal Note Internal Attachments	<i>no note</i>	
		HST Registered Supplier (Do Not Change) Delivered To Tax Treatment to Apply	External Note Attachments for supplier	<i>no note</i>	
		Ontario Normal HST Rebate	PO Clauses	<i>no clause</i>	
3 <b>C</b> Cuisinart Can Opener, Automatic CAN OPENER AUTOMATIC <a href="#">more info...</a>	SCO-60C	EA	56.90	1 EA <a href="#">Add discount...</a>	56.90 CAD
Supplier Part Auxiliary ID <a href="#">more info...</a>	80691087	Commodity Code 52140000 Domestic appliances	Internal Note Internal Attachments	<i>no note</i>	
		HST Registered Supplier (Do Not Change) Delivered To Tax Treatment to Apply	External Note Attachments for supplier	<i>no note</i>	
		Ontario Normal HST Rebate	PO Clauses	<i>no clause</i>	
<b>Supplier subtotal</b>					<b>190.40</b>

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

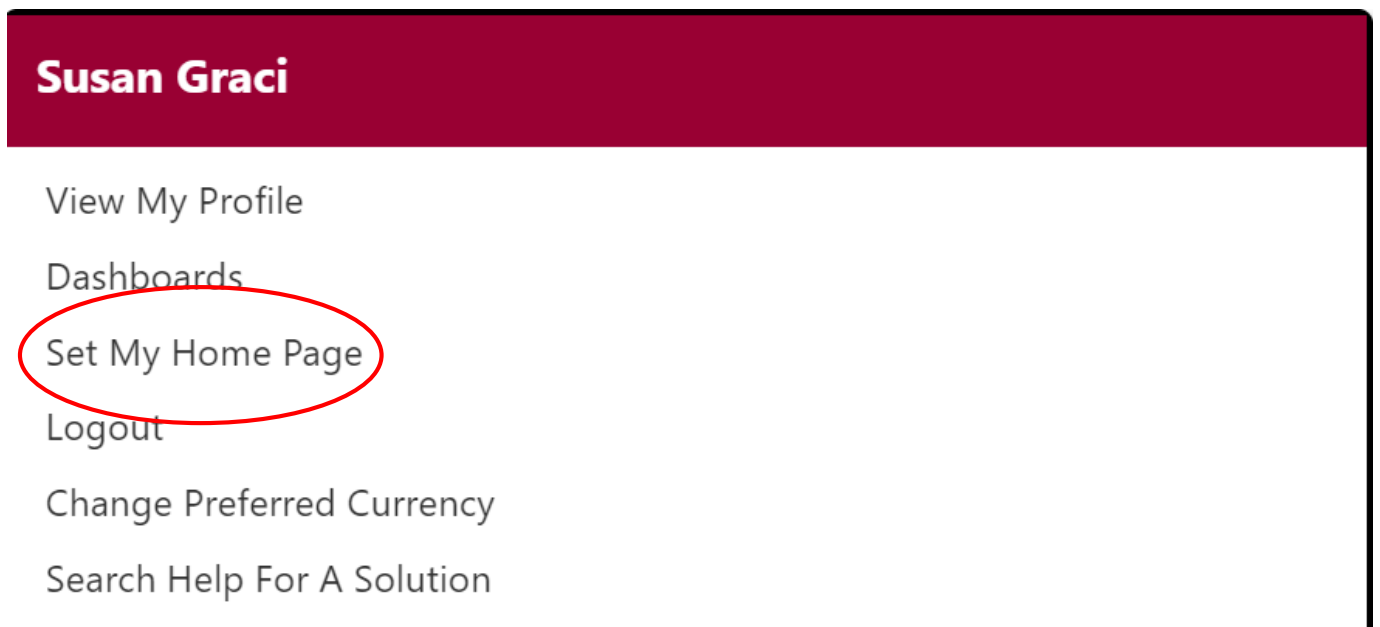
$$\$133.50 + \$56.90 = \$190.40$$



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.



**Department: 10383 (FA Accounts Payable): (All Values)  
Approval Request for Requisition# 2682632**

Dear Test Approver,

The requisition listed below has been submitted for your approval.

**Summary**

Folder: Department: 10383 (FA Accounts Payable): (All Values)  
Prepared by: Test Approver  
Cart Name: 2019-06-19 Approver 02  
Requisition No.: 2682632  
No. of line items: 1

**TOTAL: 3,764.09 CAD**

**Details**

**Jump Plus Stores ULC**

**Item 1**

Description: Apple Mac Pro 3.5GHz 6-Core Intel Xeon E5, 16GB RAM, 256GB Flash Storage and Dual AMD FirePro D500  
Catalog Number: MD878LL/A  
Quantity: 1  
Unit Price: 3,331.05 CAD  
Ext. Price: 3,331.05 CAD  
Size/Packaging: EA EA  
HST Registered: Yes  
Supplier (Do Not Change):  
Commodity Code: 43210000  
VAT Treatment: Ontario - HST - Ontario - HST

**TOTAL: 3,764.09 CAD**

**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: -

Ready to approve, reject or assign this document to yourself?

**Take Action**

**Additional Information**

**Summary Details**

Blanket/Service Order: No  
Purchasing BU: MAC01 - MAC01  
Comments: (0)

**Other Possible Approvers**

Teresa Carmel Wetton

**Shipping Address**

ATTN: Rose  
PLS: ROOM: PLS: 03 Room: 30

Requisition details (i.e. items, quantity, cost, chart field string) are in the body of the email.

Review and then click **Take Action** button.

## Requisition: 2682632

Owner:	Test Approver
Total:	3,764.09 CAD
Discount:	0.00 CAD
Tax1:	433.04 CAD
Tax2:	0.00 CAD
Shipping:	0.00 CAD
Handling:	0.00 CAD
Priority:	Normal
No. of line items:	1
Suppliers:	Jump Plus Stores ULC
Assigned To:	Not Assigned

> **Shipping**

> **Billing**

> **Accounting Codes**

> **Internal Notes and Attachments**

> **External Notes and Attachments**

> **Line Items**

> **Other Approvers**

Click on sideways arrows to left of subject to further review information.



▼ **Shipping**

**Ship To**

ATTN: Rose  
BLDG/ROOM: BLDG 23 Room 3B  
1280 Main St West  
MCMASTER-WEST CAMPUS RECV  
Hamilton, ON L8S 4M3  
Canada

**Delivery Options**

Expedite: x  
Requested Delivery Date:

▼ **Billing**

**Bill To**

McMaster University - Accounts Payable  
1280 Main Street West  
OJN Room 321  
Hamilton, ON L8S 4L8  
Canada

**Billing Options**

Accounting Date: 6/19/2019

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.

---

▼ **Internal Notes and Attachments**

Internal Note:

---

▼ **External Notes and Attachments**

Note to all Suppliers:

PO Clauses

001

Standard Terms &  
Conditions

---

▼ **Line Items**

▼ Jump Plus Stores ULC

Apple Mac Pro 3.5GHz 6-Core Intel Xeon E5, 16GB RA... [more](#)

1x 3,331.05 EA

**3,331.05 CAD**

Catalog Number: MD878LL/A

Taxable: Yes

Capital Expense: No

Commodity Code: 43210000

---

▼ **Other Approvers**



Wetton, Teresa Carmel

---

If there are any attachments, they can be viewed through the email, by a link provided. See below.



<b>Requisition:</b> <a href="#">2775652</a>
▼ <b>Internal Attachments</b> <span style="float: right;">1</span>
<a href="#">2019 AP Fall Training Schedule - Version 1 (1).docx (13k)</a>
▼ <b>External Attachments</b> <span style="float: right;">1</span>
<a href="#">1HanselandGretelNavigationTips (2) (4).docx (164k)</a>

Any other approvers in this “pool” will be displayed.  
**TIP:** Only one approver in a pool needs to approve.

➤ **Other Approvers** 1

---

**Actions**

Comment

**Assign to myself**

**Approve**

**TIP:** Assign requisitions to give the **Approver** more options in handling the approval.

**Actions**

Comment



**Success**

Requisition has been Assigned successfully!



Return to Shared Folder



Return to Requisitioner

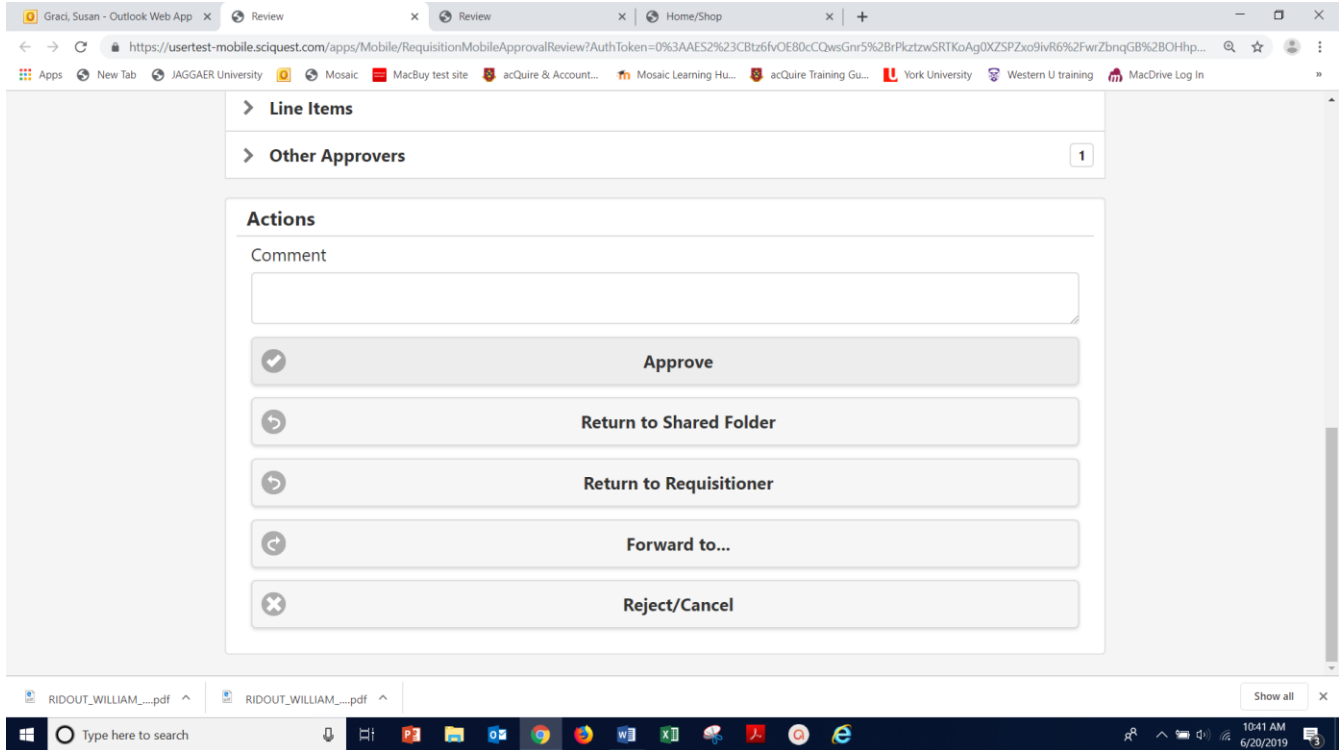


Forward to...



Reject/Cancel

A pop up box confirms the approval has been assigned to the approver.



Shipping

Billing

Accounting Codes

Internal Notes and Attachments

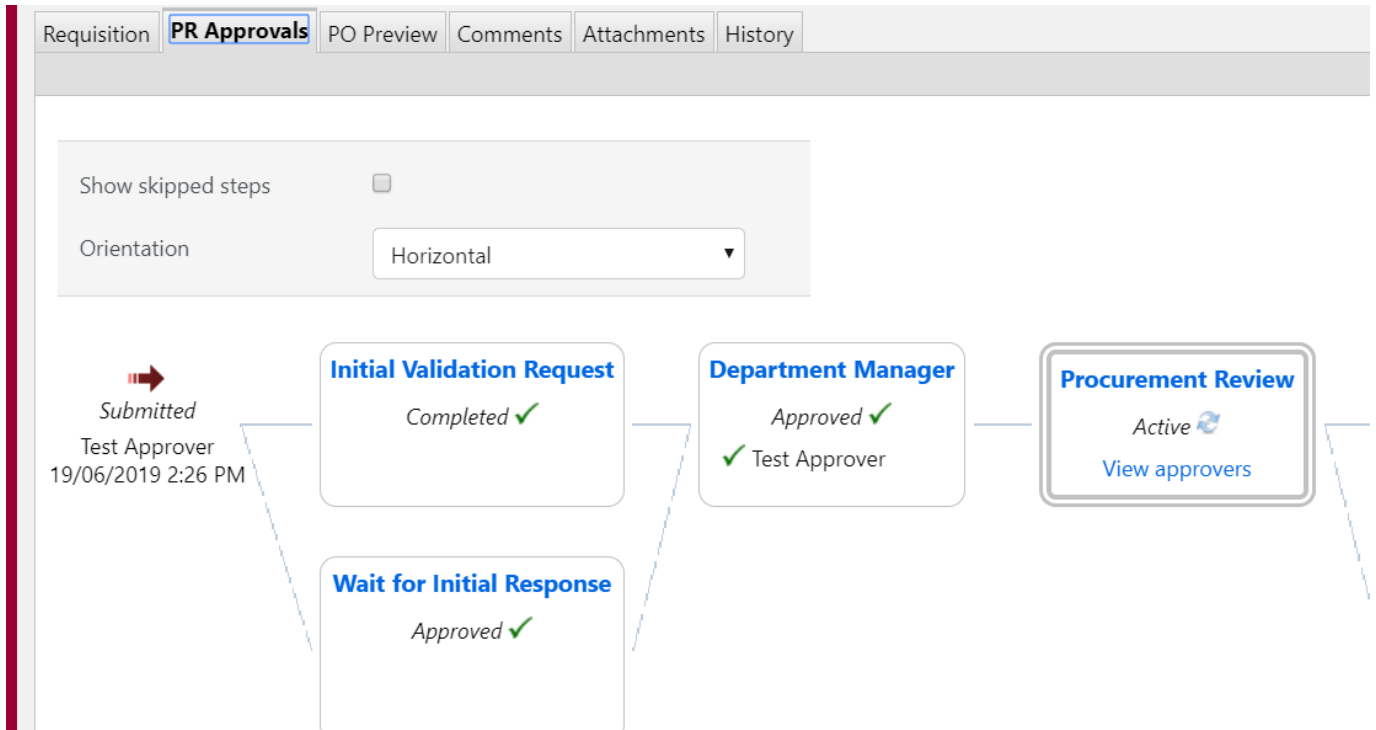
External Notes and Attachments

Line Items

Other Approvers 1

**Success**

Requisition has been Approved successfully!



Documents > Document Search > Search Documents > History - Requisition 2682616

< Back to Results 1 of 1 Results

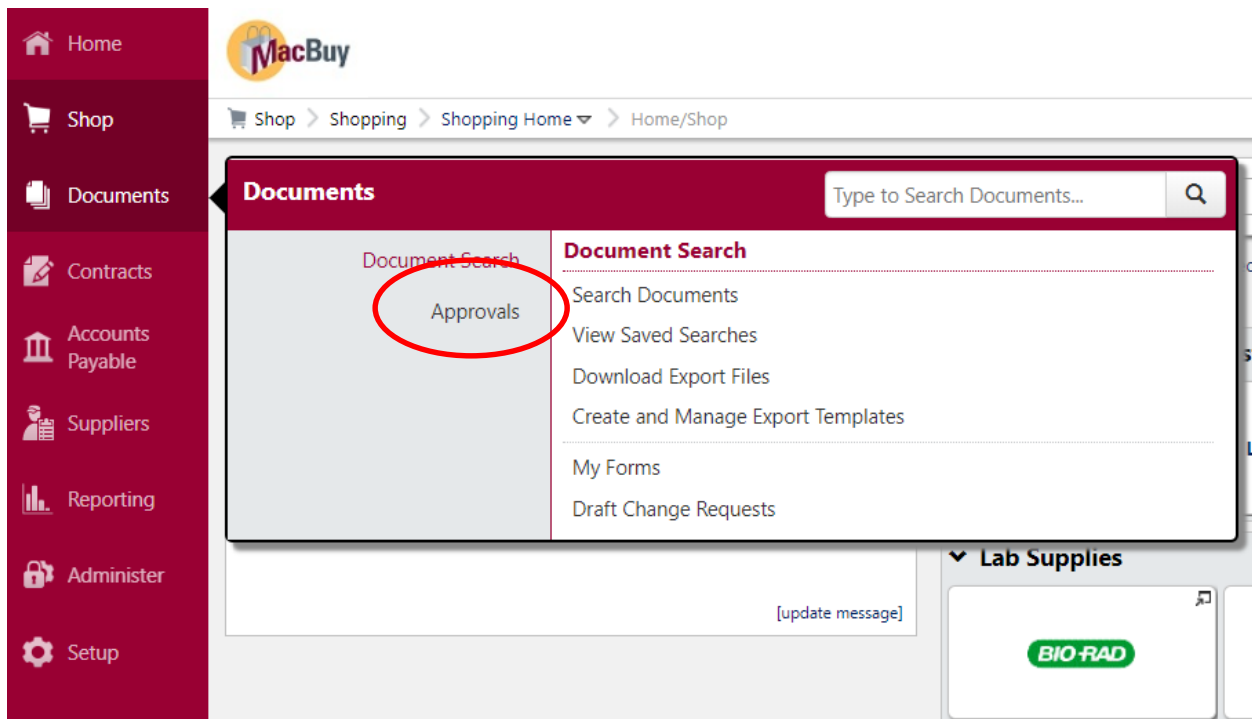
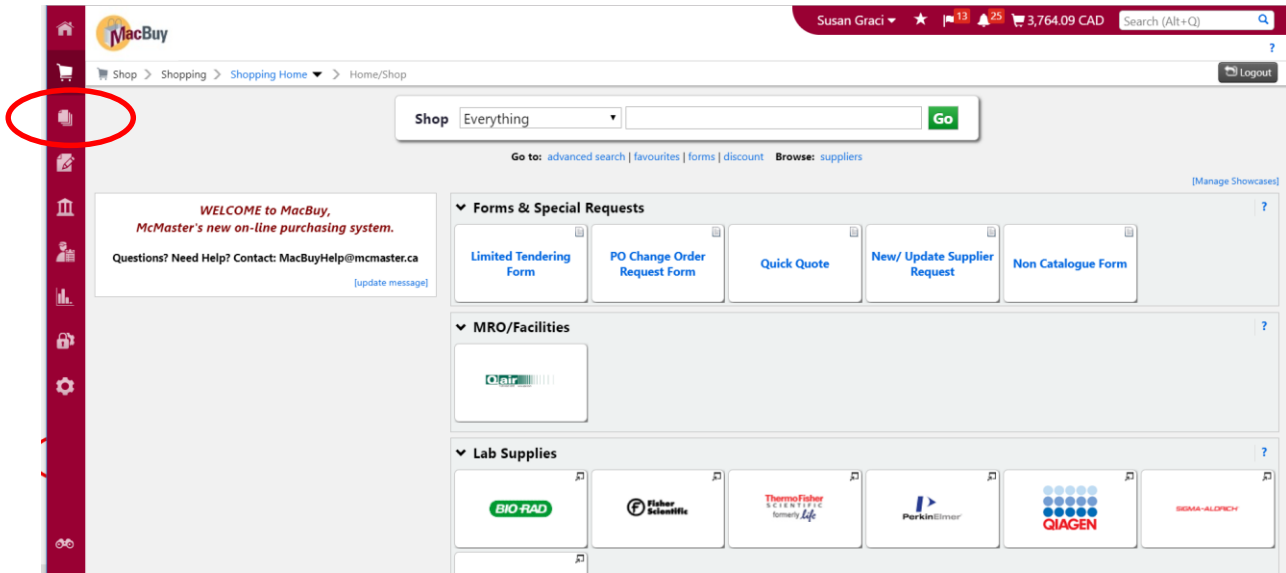
Requisition PR Approvals PO Preview Comments Attachments **History**

[+ Click to filter history ?](#)

Results Per Page 20 **Records found: 13**

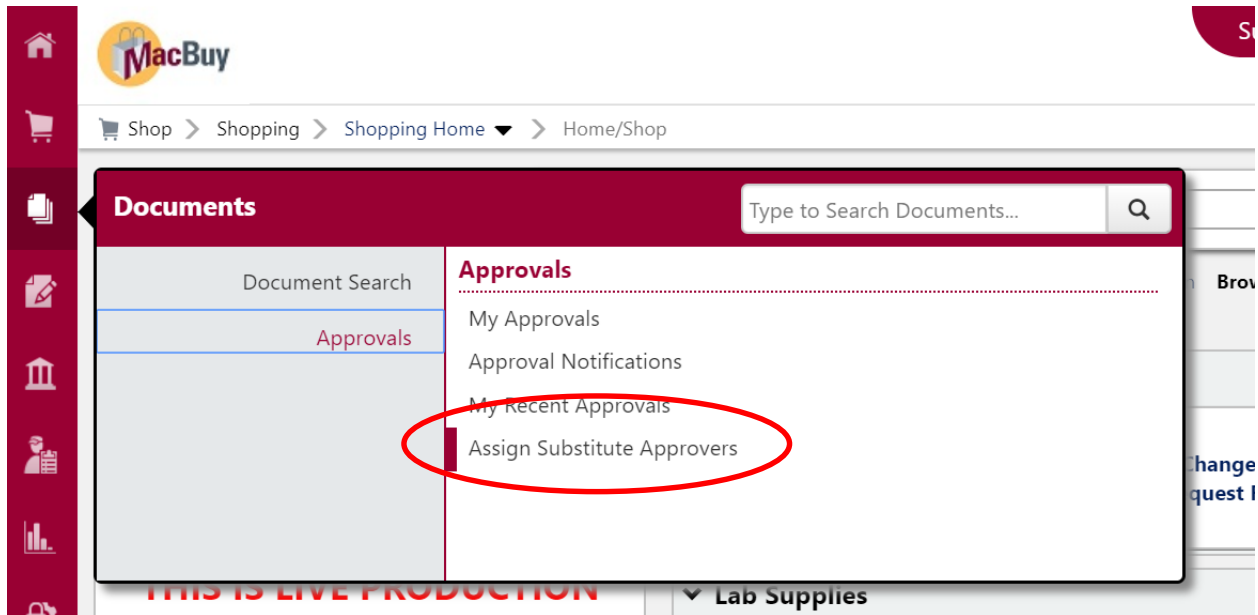
Line No	Date/Time	User	Step(s)	Action
	20/06/2019 10:42 AM	Test Approver	Department Manager	Requisition approved (via email)
	20/06/2019 10:40 AM	Test Approver	Department Manager	Requisition assigned (via email)
	19/06/2019 2:27 PM	System	Initial Validation Request	Message transmission to external system was successful.
	19/06/2019 2:26 PM	Test Approver		Requisition modified

# MacBuy Approval Delegation Process

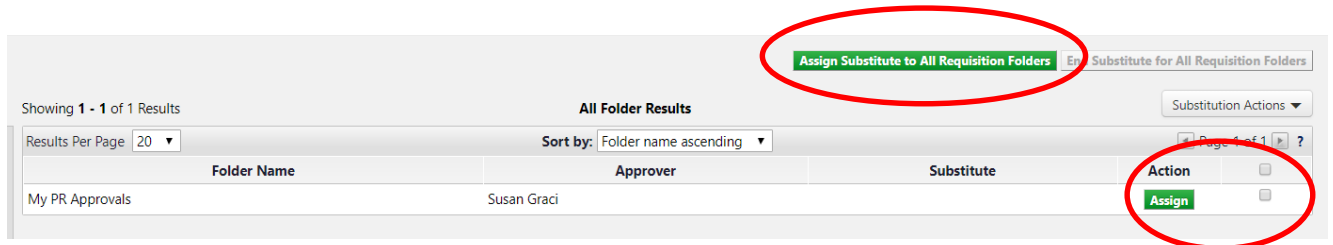


Documents>Approvals>Assign Substitute Approvers





## 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.

## Assign Substitute ✕

Include Date Range for Substitution

Substitute Name ★  🔍

★ Required Assign Close

## Assign Substitute ✕

Include Date Range for Substitution

Substitute Name ★  🔍

Start Date ★  📅 ⌚  
dd/mm/yyyy hh:mm a

End Date ★  📅 ⌚  
dd/mm/yyyy hh:mm a

★ Required Assign Close

Search for name of delegate approver.

Check "Include Date Range for Substitution".

**User Search** ×

wetton  [More Options](#)

Name	
Wetton, Teresa Carmel	<input type="button" value="Select"/>
	<input type="button" value="Select"/>

Selected Value

No Value Selected

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,

[https://financial-affairs.mcmaster.ca/app/uploads/2019/01/AP-01\\_Guidelines\\_Revised\\_FINAL\\_January\\_2019-FINAL.pdf](https://financial-affairs.mcmaster.ca/app/uploads/2019/01/AP-01_Guidelines_Revised_FINAL_January_2019-FINAL.pdf)

**TIP:** The Approver is still responsible for any actions by their delegate approver.

# Assign Substitute



Include Date Range for Substitution

Substitute Name ★

Wetton, Teresa Carmel



Start Date ★



dd/mm/yyyy hh:mm a

End Date ★



dd/mm/yyyy hh:mm a

★ Required

Assign

Close

Select the date range to cover absences, holidays, etc.

# Assign Substitute ×

Include Date Range for Substitution

Substitute Name × 🔍  
 Wetton, Teresa Carmel

Start Date ★  
 10/05/2019 12:00 AM 📅 ⌚  
 dd/mm/yyyy hh:mm a

End Date ★  
 31/05/2019 12:00 AM 📅 ⌚  
 dd/mm/yyyy hh:mm a

★ Required

Assign Close

Confirm Delegate and dates are correct.

Click on **Assign** button.

Assign Substitute to All Requisition Folders
End Substitute for All Requisition Folders

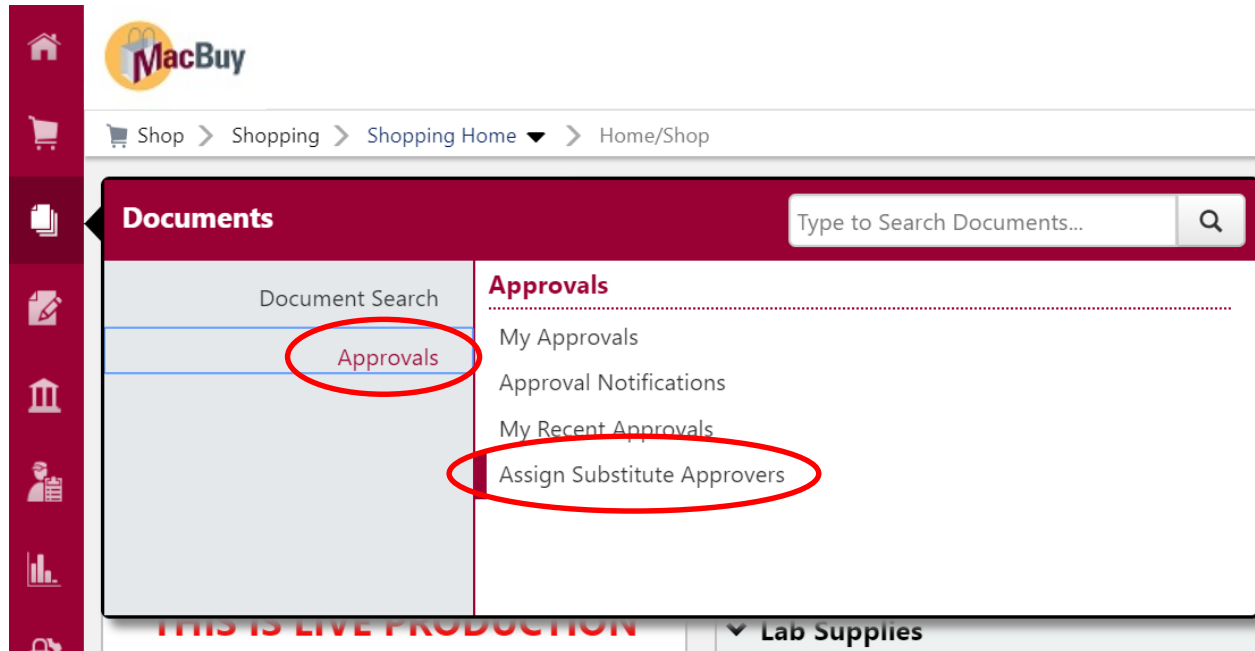
Showing 1 - 1 of 1 Results Substitution Actions ▾

Results Per Page 20 Sort by: Folder name ascending ▾ Page 1 of 1 ?

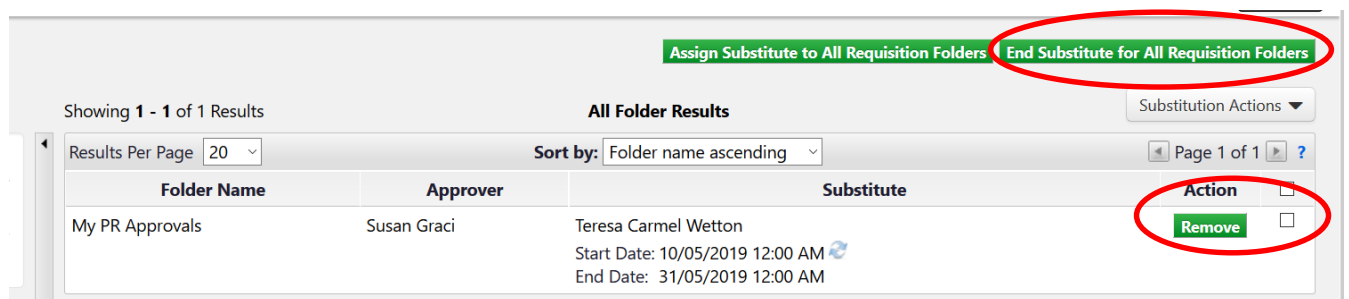
Folder Name	Approver	Substitute	Action
My PR Approvals	Susan Graci	Teresa Carmel Wetton Start Date: 10/05/2019 12:00 AM 🔄 End Date: 31/05/2019 12:00 AM	<span style="background-color: #2e8b57; color: white; padding: 2px 5px;">Remove</span> <input type="checkbox"/>

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)