BuyUSI

Approver Guide

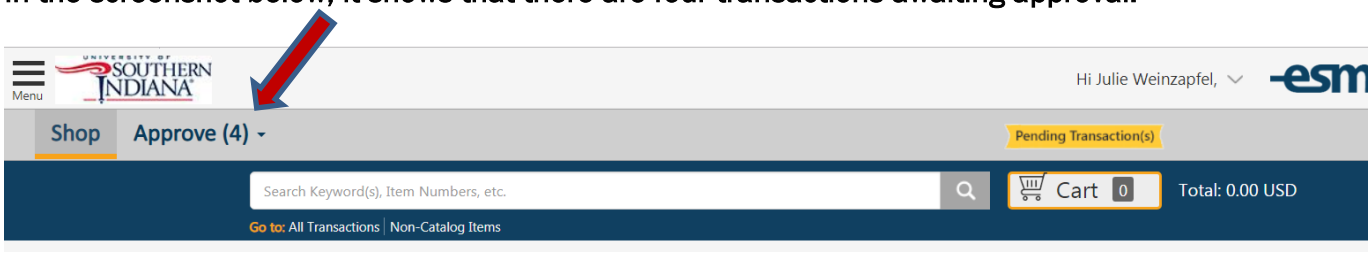
The Approver Guide

This document provides a condensed overview of the BuyUSI Approval Process. It will demonstrate with short text descriptions supported by screen shots for each step explained.

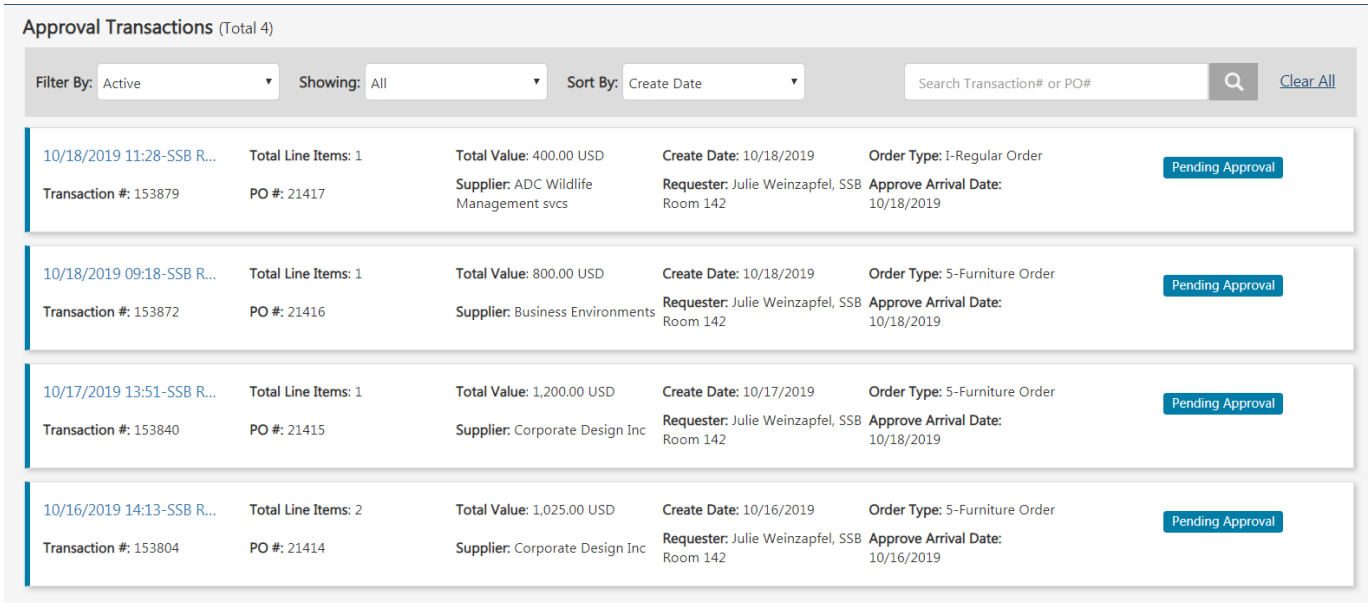
Approving Transactions:

- Financial Manager will receive an email from the system notifying them they have an order or orders to approve. Follow the link in the e-mail or Access BuyUSI.

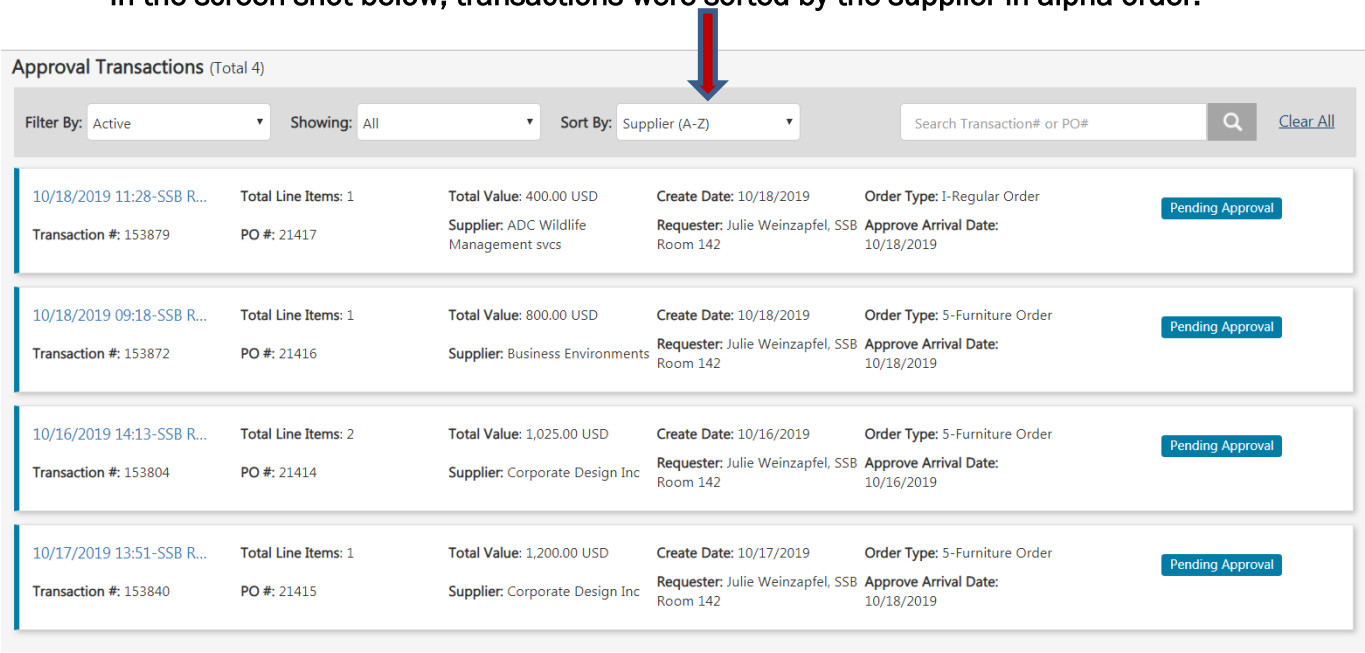
In the screenshot below, it shows that there are four transactions awaiting approval:



- Click the Approve Tab
- Transactions currently awaiting your approval will be shown



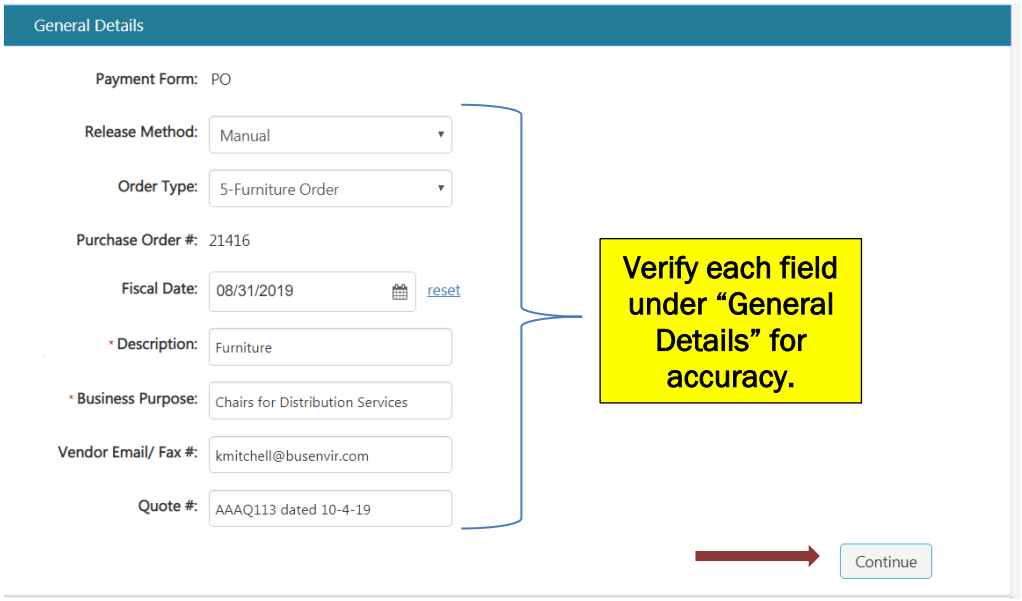
- You may use the “sort by” field to group orders together by the applicable criteria. In the screen shot below, transactions were sorted by the supplier in alpha order.



Click on a transaction to approve. Under **APPROVE,** Approvers will see seven sections:

1. General Details
2. Delivery Details
3. Billing Details
4. GL Details
5. Line Item Details
6. Notes and Attachments
7. View Workflow Details

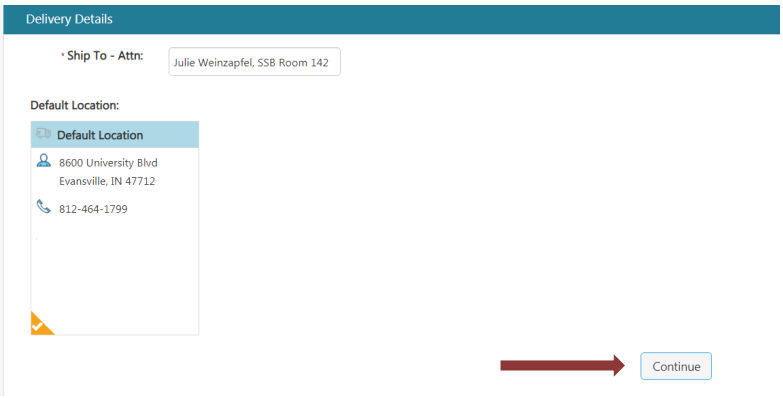
The “General Details” section will already be expanded.



Click “Continue” or go to the next detail line.

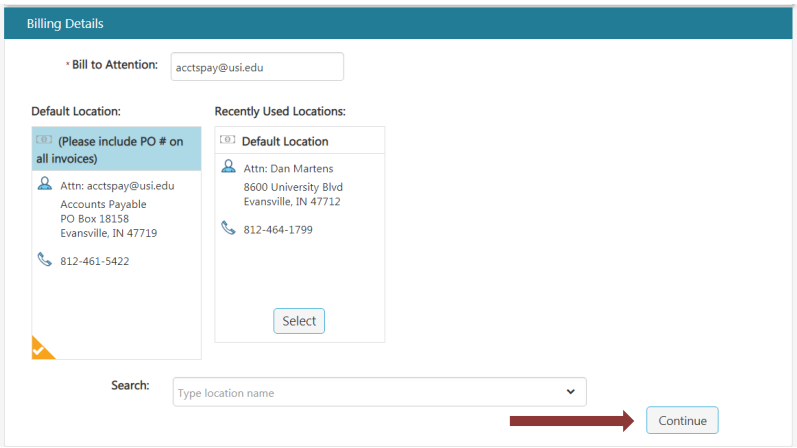
Delivery Details

This is a default field. No additional action is required. Hit “Continue” to go to **Billing Details**



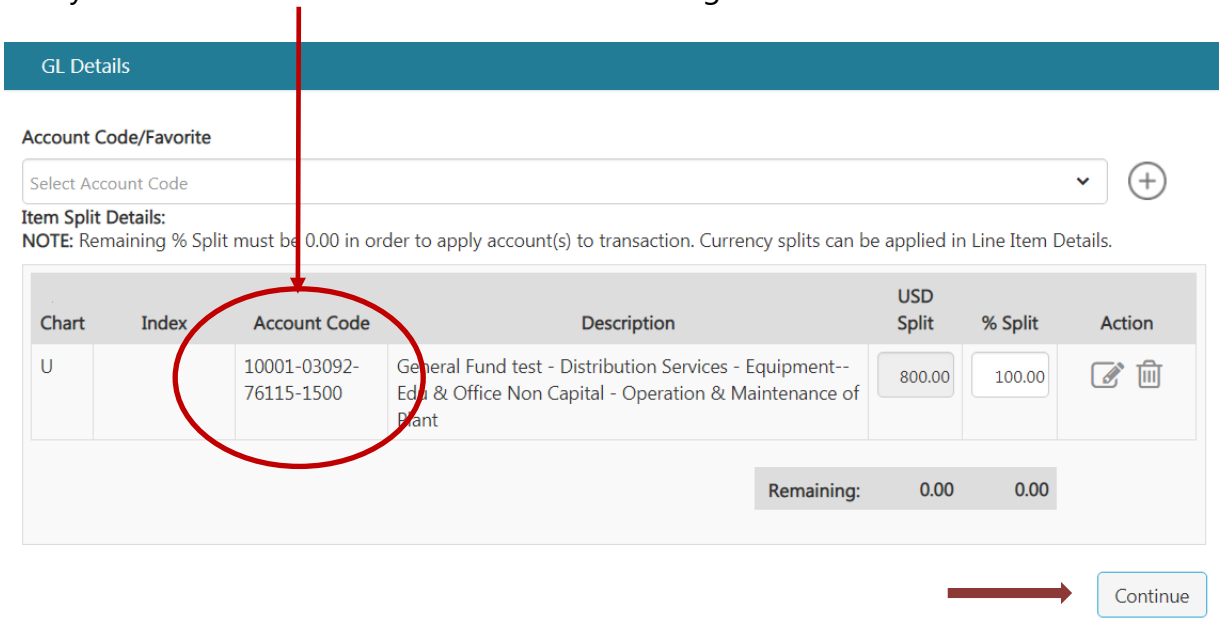
Billing Details

This is a default field. No additional action is required. Hit “Continue” to go to **GL Details**



GL Details

Verify that the FOAP is correct. Hit "Continue" to go to Line Item Details.



This will take Approvers to the line item details screen:

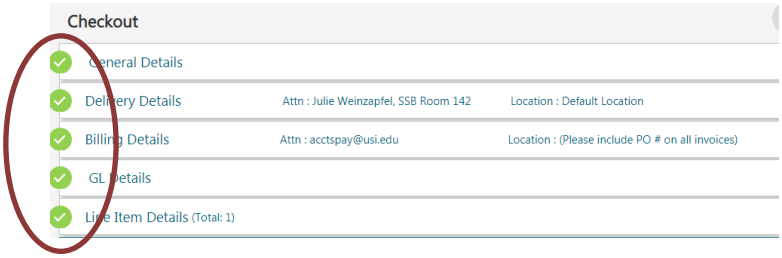
Line Item Details

Approvers confirm the final line item details including quantity and Line-item level FOAP code (use the "more…" link then select "GL Details" to view the line level FOAP).

Select Continue to confirm Line Item Details.
Complete each portion of the Checkout sections to complete the transaction.

Select Continue to save/confirm information in each section.

Each section will be marked with the green check mark icon upon completion.



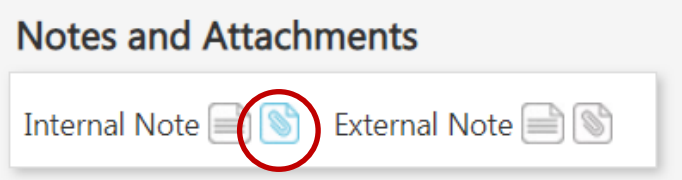
Notes and Attachments

Approvers should verify that notes and attachments are correct.

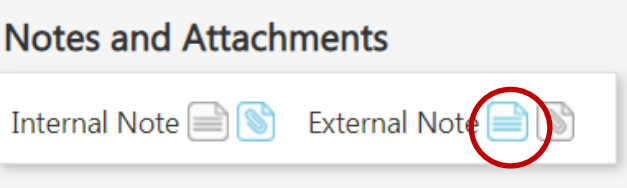
- External notes print on the PO that the vendor receives
- External attachments are sent via email to the vendor with their PO copy
- Internal notes and attachments remain in BuyUSI. These are used for internal communication

Notes and attachments are typically not necessary with catalog transaction as there is not quote to attach.

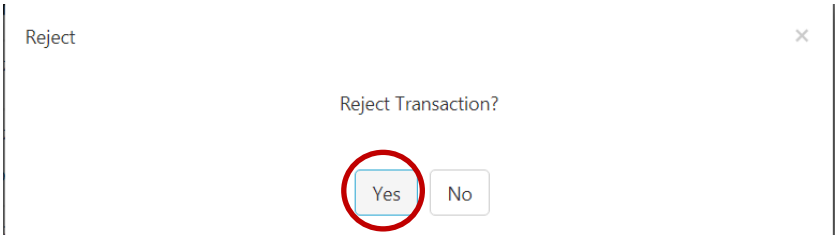
The paperclip icon will be blue, indicating that there is an attachment.
Approvers should verify that the correct attachments have been downloaded.



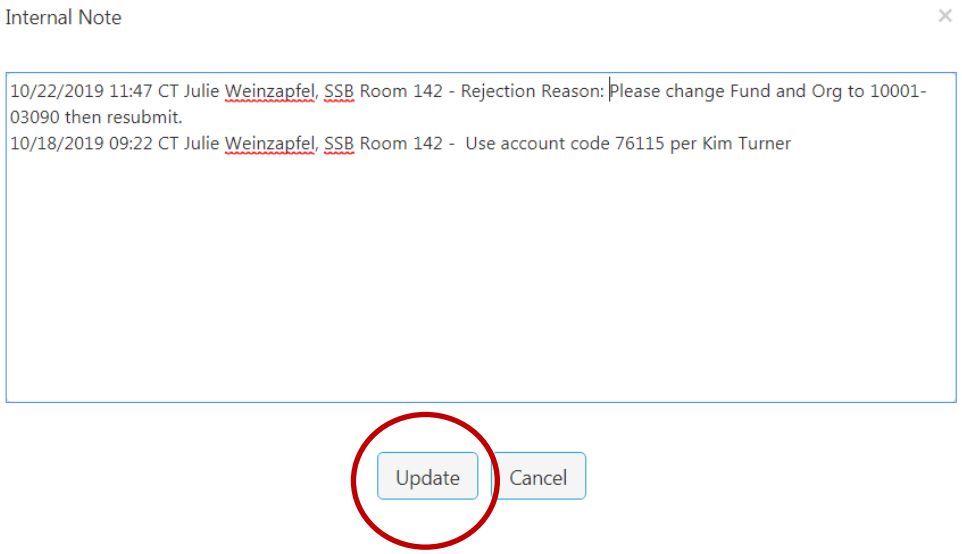
The page icon will be blue, indicating that there is a note.
Approvers should verify that the notes are accurate and applicable.



If any of the information needs to be changed, updated or otherwise edited, the approver should select “Reject”. Chose “Yes”

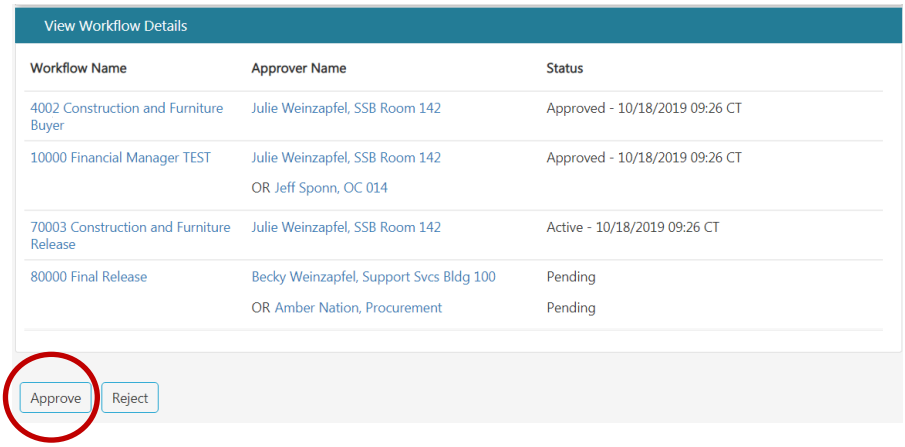


This will open the internal note and allow the approver to notate the reason for the rejection.
Once the rejection reason has been entered, select “Update”.



The transaction will go back to the requestor. The requestor will make the requested changes and resubmit the transaction for approval.

Once all information entered has been verified, approvers will then select "Approve".



View workflow Details

The workflow will generate after the order is validated. Requestors and Approvers will be able to see who will be reviewing and approving transactions. If any transaction validation rules are triggered, more information will be listed under the System Note. Once the condition is resolved, the transaction can be re-validated for approval.

Viewing Workflows:



A date stamp and time will be applied after each approval.

"Active" Status means that the transaction is currently in that approval queue.

"Pending" Status means that the queue is next for approval once the queue above it has been approved.

If a transaction is rejected, that status is shown as well and remains until approval is granted.



Once all approvals have been obtained, Procurement will turn the transaction into a Purchase order.

A Banner purchase order number is generated for the order. Purchase order numbers begin with the letter "P".

Non-Catalog orders are emailed by Procurement to the vendor.

Catalog orders are sent electronically through the eProcurement system to the vendor.

The requester will receive an email notification when the release occurs.