

## Approver Guide

This guide will review how to review and approve requisitions

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### Logging In

1. Open your web browser.
  2. In the address field, type:
  3. <https://lehigh.unimarket.com>
  4. The login page will appear.
  5. Enter your Lehigh user name and password. Press Enter or click Login.
- The Unimarket home page will appear.

### Approval Process

The approval process in Unimarket will work similar to how it does in Banner. Email notices are sent to all approvers. If action is not taken within 24 hours from the first notice, a reminder email will be sent out. If no action is taken within 72 hours of the approval task, the approval will be escalated to the next approval queue for approval.

The approval routing will be based on the Department (Org Unit), Index/Account and authorization \$ levels. The \$ level that is considered for routing the requisition will be based on the sum of the requisition.

### Approval Authority Levels

- \$0.00 – No Authority
- \$500
- \$1,999.99
- \$9,999.99 – Competitive Bid
- \$49,999.99
- \$99,999.99
- \$999,999.99 - Clearing Authority (for non-departmental approvals only)

### Approval Notifications

#### Email Notifications

You will have received an email 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 the requisition view.

**Requisition RQ130294 (A M Exclusive Business Machines, Inc.) for Initiator Name**

Description	Account Code	Qty	Distribution	Percentage	Unit Price	Subtotal
AM-00A COLOR	132510-7112	55	\$3,520.00	(100.00%)	\$64.00	\$3,520.00
AM-016204500	132510-7112	55	\$6,325.00	(100.00%)	\$115.00	\$6,325.00
CB509A-R	132510-7112	5	\$2,995.00	(100.00%)	\$599.00	\$2,995.00
					Subtotal	\$12,840.00
					Shipping	\$0.00
					<b>TOTAL</b>	<b>\$12,840.00</b>

[Please login to approve or decline this requisition.](#)

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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.


**Approval No Longer Required**

Teachers College

**Requisition RQ130294 (A M Exclusive Business Machines, Inc.) for Brian Sweeney: No further action required.**

Your approval is no longer required because the requisition has already been Approved or Cancelled. The approval task has been removed from your approval queue.

Description	Account Code	Qty	Distribution	Percentage	Unit Price	Subtotal
AM-00A COLOR	132510-7112	55	\$3,520.00	(100.00%)	\$64.00	\$3,520.00
AM-016204500	132510-7112	55	\$6,325.00	(100.00%)	\$115.00	\$6,325.00
CB509A-R	132510-7112	5	\$2,995.00	(100.00%)	\$599.00	\$2,995.00
					Subtotal	\$12,840.00
					Shipping	\$0.00
					<b>TOTAL</b>	<b>\$12,840.00</b>

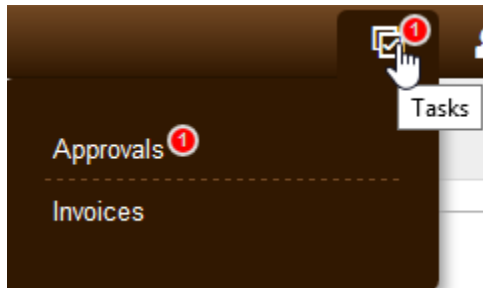
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### Notifications in Unimarket

You will know that you have approvals waiting for your review when a red number appears next to Tasks in the menu bar of Unimarket.



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

Approvals			
Dell Marketing ...	Annette Ruhe	1/5/2015 9:53 AM	\$1,469.83
<a href="#">View all approvals</a>			

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 of your outstanding approval actions as well as additional Unavailability settings.

### Approval Page

#### Unavailability Settings

The Unavailability from and through to date fields should be set when you know you will not be in the office or available to take the approval actions for an extended period of time. When marked as Unavailable, any approval actions that are routed to your queue will sit with other authorized approver in your approval group or escalate to the next group if no one else is available. You will see a notification indicating that your unavailability has been set. The unavailability will disable on the ending date/time.

Unimarket will be adding the ability to assign a Proxy Approver in the coming weeks. This feature will be available when you set your unavailability.

#### Requisition Approval Overview

The approval page will display all outstanding approvals in your queue 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.

#### Approvals

You are currently available and will receive approval requests

☐ Unavailable from  7 :  through to  7 :

Approval State *	Pending	Buyer	
Approval Task Date From	11/5/2014 7	Approval Task Date To	1/5/2015 7
Requisition Number			

Requisition	Buyer	Supplier	Type	Created Date	Total	
RQ000008	Annette Ruhe	Dell Marketing L.P.	Standard	1/5/2015 9:53 AM	\$1,469.83	Approve / Decline

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### Approve/Decline Window

The Approve/Decline button 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.





### Requisition View


#### Actions

The requisition view as an approver will present two actions at the top right corner of the page, Approve/Decline and Edit.

Actions:   Approve / Decline  Edit

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



 Edit 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
- Edit notes
  - Justification notes are for internal use and will **not** be visible to the supplier
  - Delivery Notes are sent to the supplier
- Index and Account

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- Editing the FOPAL (Index and Account) may change the routing of the approval if the requisition is being approved for certain Index and Account combinations.

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

The approval history is shown to all on the requisition view as well as the Transaction Summary PDF (available on the PO view).

The approval history shows the

- Approver or approval group
- The Created Date - date/time that the approval task was originated for the approver(s)
- 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 or Declined

### Approvals

ORG Unit Approval: 2600 - Library and Technology Services (2600 - Library and Technology Services)					In Progress	
Approver	Created Date	Completed Date	Level	Type		
LTS Buyer Review			\$1999 (\$1,999.99)		Escalate	In Progress
 Jeanne Dearden	1/5/2015 9:53 AM					
 Annette Ruhe						
 Gail Sheek	1/5/2015 9:53 AM					