UShop MARKETPLACE

Electronic Procurement and Payment System

Approver Training

1. The UShop Process Overview
2. How does someone become an Approver (GFA)?
    a) Can Approving authority be delegated?
3. How to Find What needs to be Approved?
4. How to Approve:
    a) A Requisition
    b) An Invoice
5. Help Resources
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UShop Process Overview

As someone with signing authority, through GFA, the system requires your Approval for requisitions to move forward

Shop → Proceed to Checkout → **Review & Approve** → Purchase Order → Order Received → Invoice Received → Supplier Paid

Approval Examples:

Department Approval (GFA)

Purchasing (order over 5K)

GCA (projects)

How does someone become an Approver (GFA) Can Approving authority be delegated?

Review & Approve

Approvals:

Routed through Workflow

How you became an Approver:

- The GFA system is the electronic signature system for the University of Utah
- As an Account Executive (AE) or Principle Investigator (PI) you have financial responsibility over the activity/project(s) which fall under you control
- As an AE or PI the role of Approver is automatically granted to you by virtue of your authority in GFA
- GFA data imports into UShop nightly to maintain correct signatures in the system
- Therefore, if a UShop order uses a funding source that you are responsible for, you must provide your approval, or designate an alternate to handle that responsibility for you

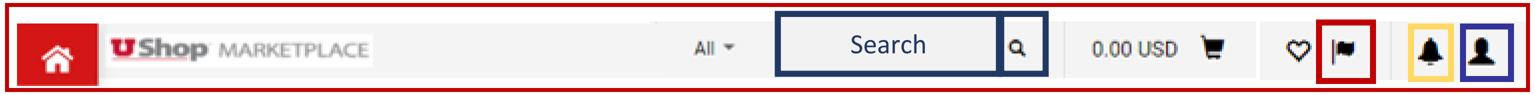
How to delegate authority:

- In the GFA system financial authority can be granted to delegates (authorized alternates) in one of two ways.
  - Full authority on the activity/project
  - UShop only authority
    - This allows an authorized alternate to approve UShop orders but doesn't extend beyond that to other types of financial transactions or functions

GFA Helps

How will I be notified that my approval is required?

Email notification (if turned on) or Action Items
are the 2 ways to be notified of a requisition requiring approval



Email

1. For those who have email notifications turned on, you will receive an email when a requisition requires approval.
   a) Open the email
   b) Find the Requisition number
   c) Copy the Requisition number and paste it into the top search bar to access the Requisition
      - The next slide will show how to approve.

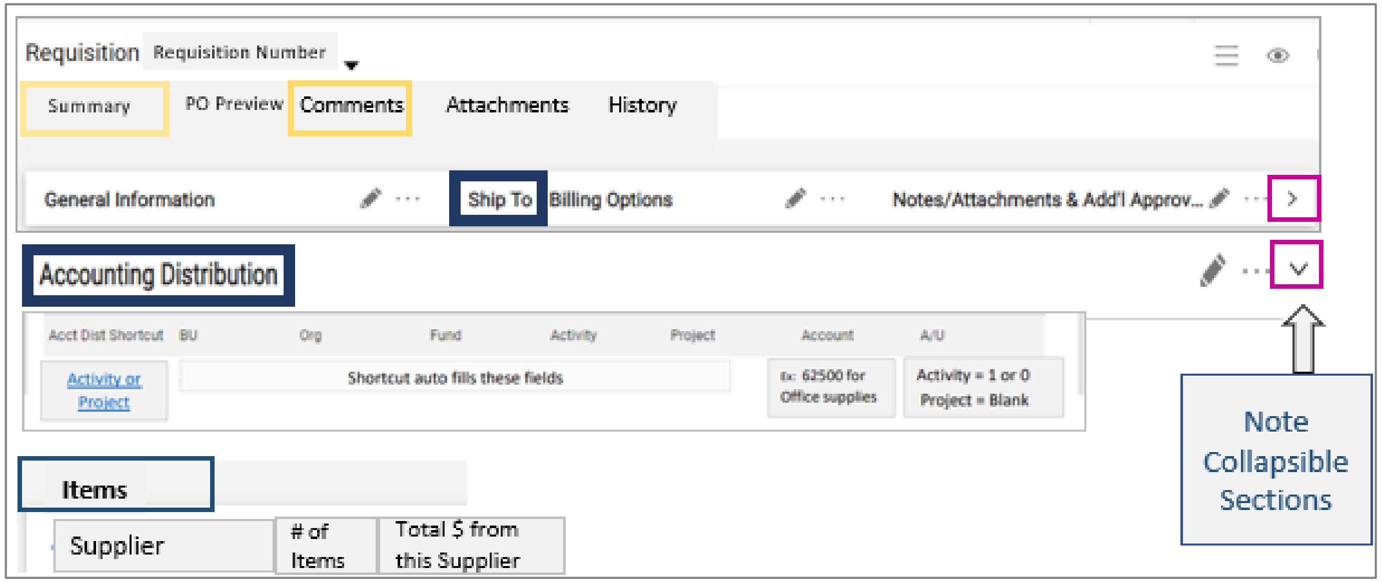
Action Item

1. In the UShop system click on the Flag Icon to view requisition(s) pending approval
2. Click on My **Assigned** Approvals (for those you have assigned to yourself) or on **Unassigned** Approvals to see new Requisitions
3. Click on the > to expand the section and see Activities or Projects folders
4. Click on the Requisition number
   - The next slide will show how to approve.

How to Approve a Requisition

Review:

- What is being purchased (*Items*)
- Accounting Distribution
- Ship To location
- Comments, etc



How to Approve:

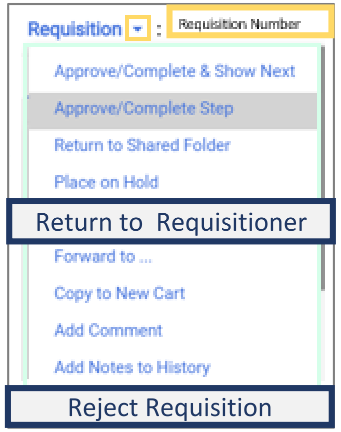
- If the Requisition is ready to be approved then click on the *down arrow*
  - Click *Approve/Complete*

What if I don't want to Approve an order or if changes need to be made?

- Begin by clicking on the *down arrow*
  - Click *Assign to Myself*

By clicking on *Assign to Myself* additional options can now be displayed

- Then click on the Down Arrow a 2nd time to view the updated options
- Click on the Action desired.
  - *Return to Requisitioner*
    - This allows the requisitioner to make changes on the requisition and then re-submit the requisition
  - *Reject Requisition*
    - The transaction will be rejected and the requisition cannot be edited/adjusted in any way.



Just like there are Requisitions that may require your approval before moving forward, in some cases, an Invoice will require your approval. In those cases, the vendor will **not be paid** until you, or one of your Authorized Alternates, approve this Invoice.

Invoicing & Payment - Approval

Certain criteria will trigger a required approval in order for the invoice to be paid.

Invoice criteria which trigger approval:

1. When an Invoice total is greater than $50,000 approval will be required through Invoice Workflow.
2. When a project is within the last 90 days of ending, approval will be required through Invoice Workflow.
3. When “Hold for Invoice Approval” is checked on the Billing Tab, during Proceed to Checkout, this creates a required Invoice Workflow Approval step.

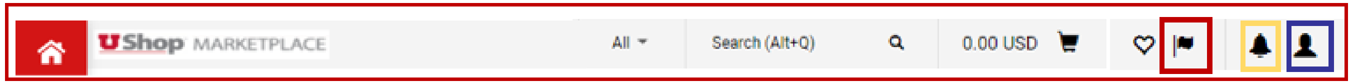
Who can Approve an Invoice:

Those who are authorized to approve the Invoice Workflow step are those with authority through the GFA system. This functions in the same way that Departmental Approval does in the Requisition Workflow.

- The system will notify the Approver(s) that an Invoice requires approval. Meaning through email and/or Action Items Flag Icon

To Approve an Invoice:

To access the Action Items begin by Clicking on the Flag Icon

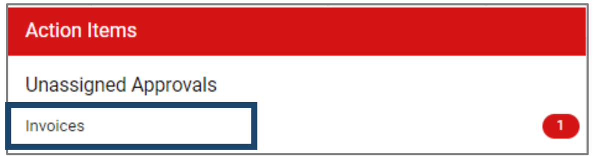


- [ ] Action Items (Flag Icon)

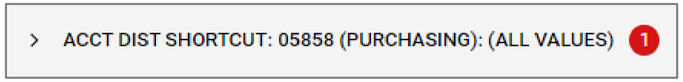
Invoicing – Approval

To approve an Invoice:

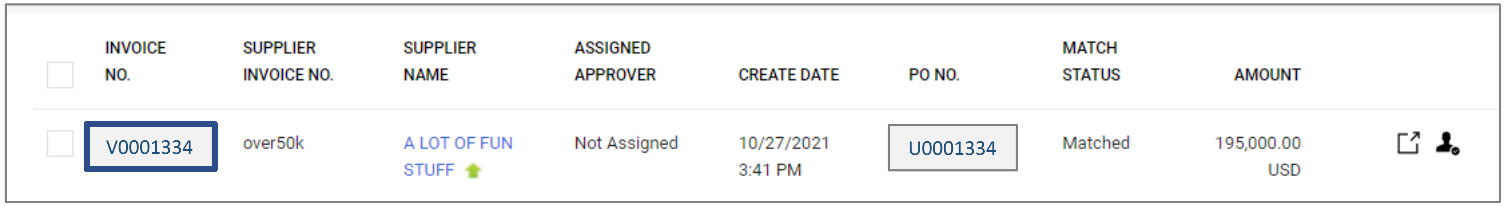
- ❑ From the Action Items (Flag Icon)
  - Click on Invoices



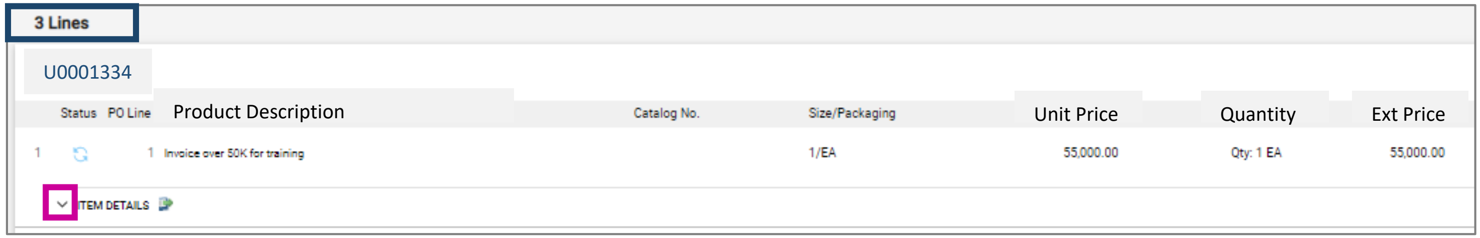
  - Click on the Approvals Folder to view the Invoices which await approval



  - List of Invoices to approve will be listed. Note each Invoice awaiting approval begins with a V and has a hyperlink to the invoice

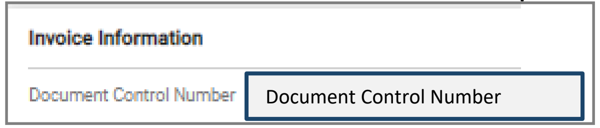


  - Scroll to see the line item detail for the Invoice.



To view the PDF Invoice from the supplier click on this link to OnBase

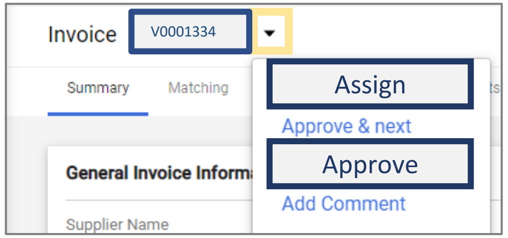
- Type in the PO number to view all invoice PDF's for that PO
- Note the Document Control Number in UShop to find the corresponding PDF from OnBase



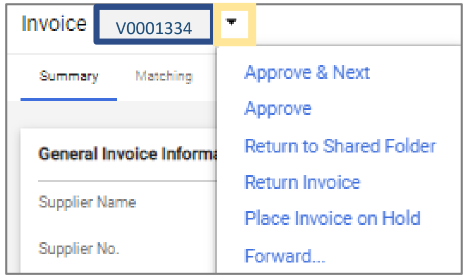
Invoicing – Approval

When ready to approve:

- Click on the Down Arrow to see the options to *Assign* the Invoice to yourself or to *Approve* the invoice for payment.



Note other invoice actions which are available.



- When choosing anything other than *Approve* keep in mind that this is adding delay to the payment to the supplier.
- Timely payments from The University of Utah to the supplier are critical.

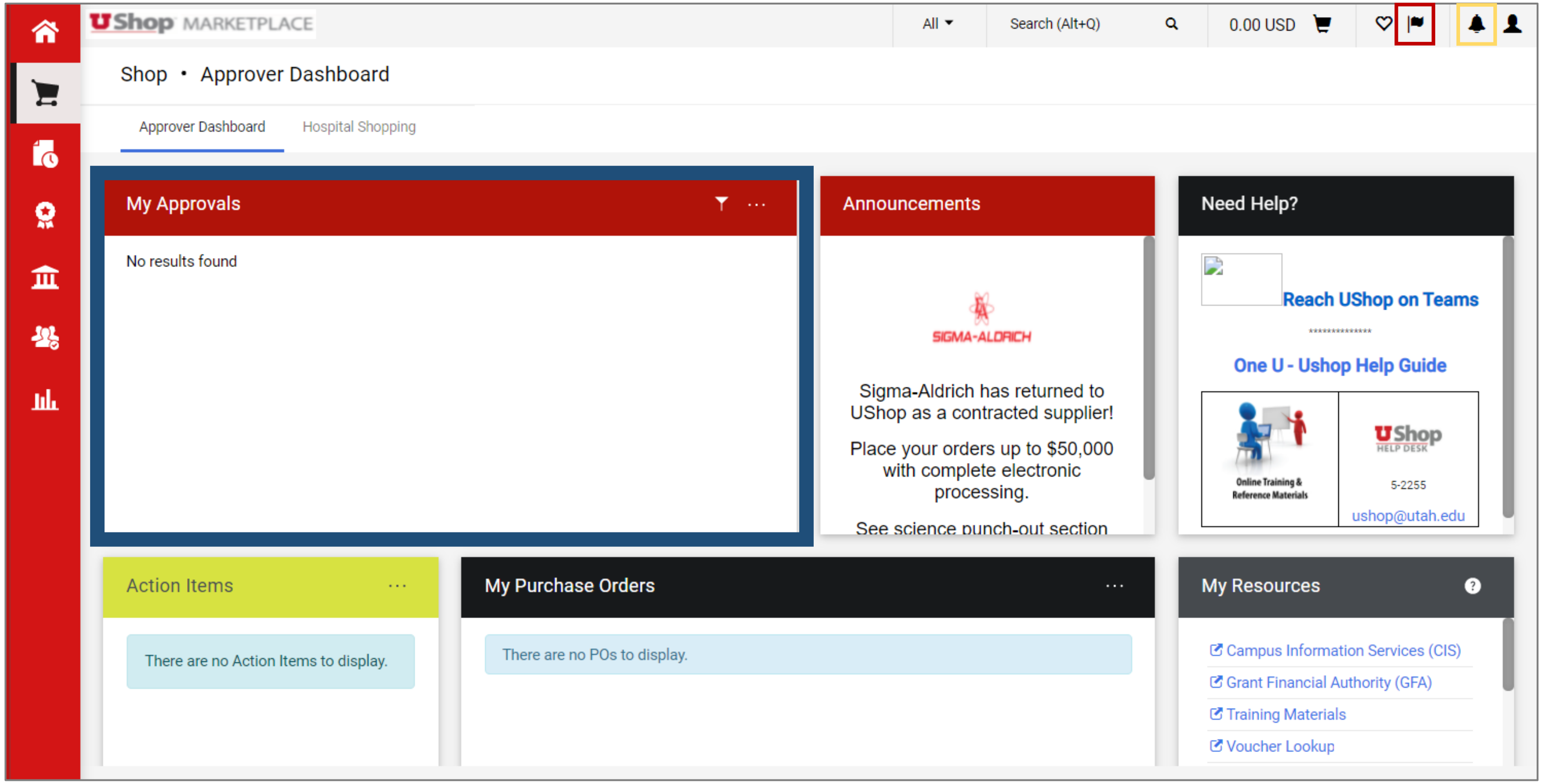
If payment ought to be on hold make sure to add a comment on the Invoice stating the reason for delayed approval.

- An additional option is to email ap@admin.Utah.edu regarding the hold/delay of approval on the Invoice. This will help A/P to assist you and the supplier.

Approver Dashboard

Note the My Approvals section on the Approver Dashboard provides a quick view of all items requiring approval by you.

This is an additional path that an Approver can take to get to a Requisition or Invoice to approve



Help Resources

We are here to help when you have questions or need help.
Please contact us:

- By Email at ushop@utah.edu
- Through calling **5-CALL** (801-585-2255)
- Through IM via reach the UShop team on Teams

Self help links

- Main help document One UShop
- Online Training & Reference Materials

Report & Searching

The system has many tools to assist in searching for information regarding Requisitions, PO’s and Invoices

In addition to finding these documents it may also be helpful to create reports from the data in the system.

To Search:

1. **Columns**: When using Document search for Requisitions, PO’s and Invoices; it is important to know that there are different columns for each document type.

   - It may be helpful to preset the c**olumns** for each document type prior to searching for an order(s) with the information that would be most relevant to your daily needs.

For Example, in search by Requisition, having these columns preset (pinned) may assist when searching desired transactions.

	Requisition Number	Supplier	Requisition Name	Submitted Date	Total Amount	PO Number	Prepared For	Current Workflow Step	Requisition Status

2. **Filters**: Filters allow for more in depth and specific searching of the data.

   Add Filter

   - For example: Refine by Filtering by Org, Participant, Supplier, Invoiced, etc.

Click on these links for assistance for formatting Columns, Filters , and searching for transactions.

Reporting:

- Reports can be created by you. Reports created through the system can be exported to Excel

  Reports can also be saved, scheduled to run at varying intervals and more

- For assistance on creating reports click on this link

  If there is a report you would like to create and desire assistance in setting it up please email UShop@Utah.edu and we will help you set it up

UShop™
MARKETPLACE

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