

U ShopTM MARKETPLACE

Electronic Procurement and Payment System

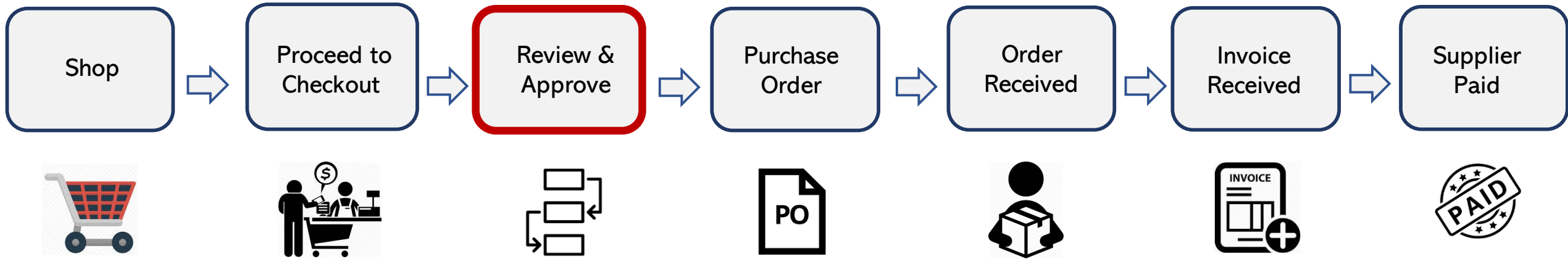


Approver Training

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
6. Searching and Creating Reports

UShop Process Overview

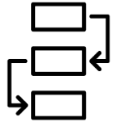
As someone with signing authority, through GFA, the system requires your Approval for requisitions to move forward



Approval Examples:
Department Approval (GFA)
Purchasing (order over 5K)
GCA (projects)

How does someone become an Approver (GFA)

Can Approving authority be delegated?



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 your 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

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

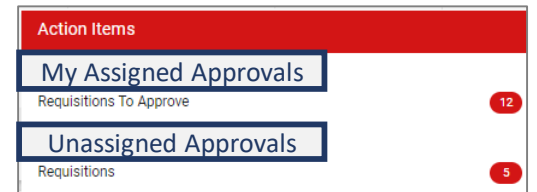


Email

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

The screenshot shows the 'Requisition' interface with the following sections and callouts:

- Summary** (highlighted in yellow)
- Comments** (highlighted in yellow)
- Ship To** (highlighted in blue)
- Accounting Distribution** (highlighted in blue)
- Items** (highlighted in blue)
- Options Dots** (highlighted in blue)
- Note Collapsible Sections** (callout box pointing to the options dots)

| Acct Dist Shortcut | BU | Org | Fund | Activity | Project | Account | A/U |
|-------------------------------------|----------------------------------|-----|------|----------|---------|-------------------------------|--------------------------------------|
| Activity or Project | Shortcut auto fills these fields | | | | | ex: 62500 for Office supplies | Activity = 1 or 0 Project = Blank |

| Supplier | # of Items | Total \$ from this Supplier |
|----------|------------|-----------------------------|
|----------|------------|-----------------------------|

How to Approve:

- If the Requisition is ready to be approved then click on the Options Dots

The screenshot shows the 'Requisition' interface with the options menu open. The 'Approve' button is highlighted in blue.

- Click *Approve/Complete*

- Assign to myself
- Approve**
- Copy to New Cart
- Add Comment

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

- Begin by clicking on the Options Dots

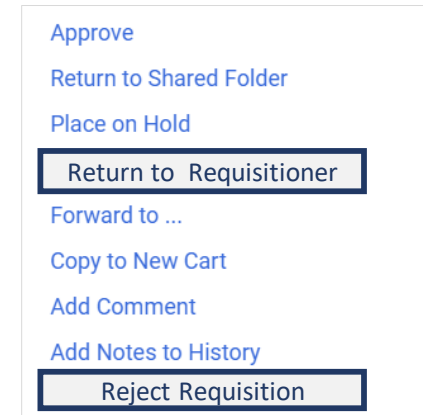


- Click *Assign to Myself*



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

- Then click on the Options Dots 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 “Hold for Invoice Approval” is checked on the Billing Tab, during Proceed to Checkout, this creates a required Invoice Workflow Approval step.
3. The invoice is related to a Sub-Award, as indicated by Account codes “628nn” through “629nn”.

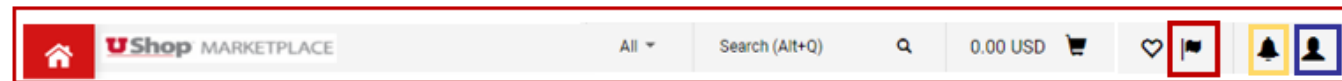
Who can Approve an Invoice:


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

> ACCT DIST SHORTCUT: 05858 (PURCHASING): (ALL VALUES) 

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

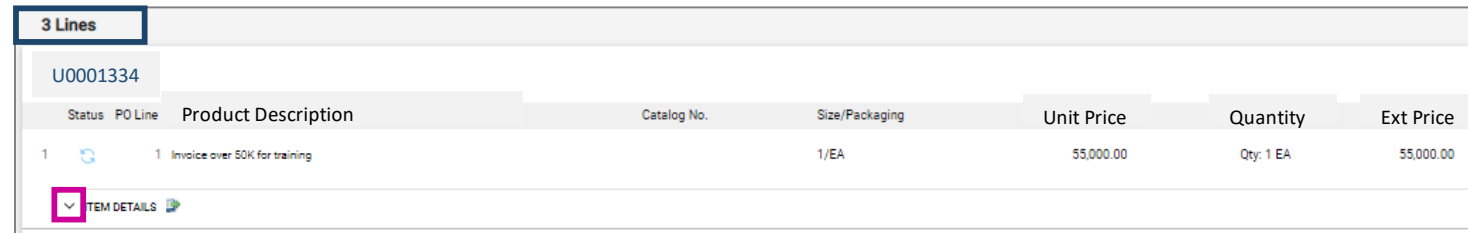
| <input type="checkbox"/> | INVOICE NO. | SUPPLIER INVOICE NO. | SUPPLIER NAME | ASSIGNED APPROVER | CREATE DATE | PO NO. | MATCH STATUS | AMOUNT | |
|--------------------------|-------------|----------------------|--|-------------------|--------------------|----------|--------------|----------------|---|
| <input type="checkbox"/> | V0001334 | over50k | A LOT OF FUN STUFF  | Not Assigned | 10/27/2021 3:41 PM | U0001334 | Matched | 195,000.00 USD |   |

- 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



The screenshot shows a table with 3 lines. The first line is selected and highlighted. The table has columns for Status, PO Line, Product Description, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext Price. The first line has a status of '1', PO Line '1', Product Description 'Invoice over 50K for training', Catalog No. 'U0001334', Size/Packaging '1/EA', Unit Price '55,000.00', Quantity 'Qty: 1 EA', and Ext Price '55,000.00'. There is a 'ITEM DETAILS' button with a dropdown arrow.

Invoice Information

Document Control Number

[CLICK HERE TO DOWNLOAD](#)

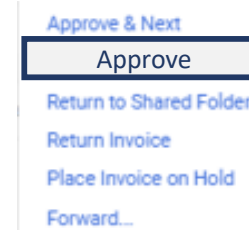
Invoicing – Approval

When ready to approve:

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



Note other invoice actions which are available after Assign to Myself has been clicked on.




- 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.



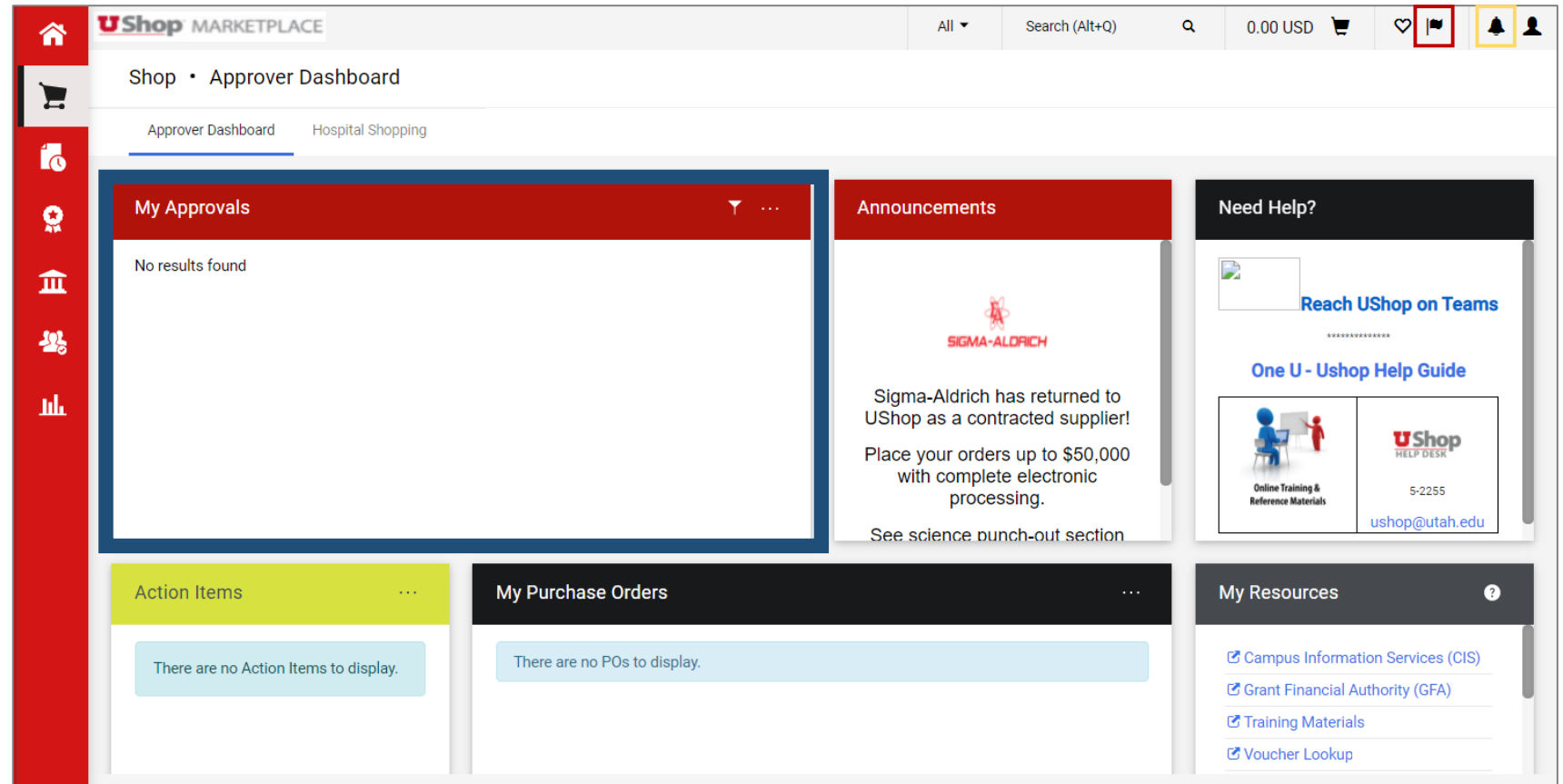
If payment ought to be on hold make sure to add a comment on the Invoice stating the reason for delayed approval.

- 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



The screenshot displays the UShop Marketplace interface for an Approver. The top navigation bar includes the UShop logo, a search bar, and a currency indicator (0.00 USD). The main content area is divided into several sections:

- My Approvals:** A red header section with a dropdown menu and a message stating "No results found". This section is highlighted with a blue border.
- Announcements:** A red header section featuring a Sigma-Aldrich logo and text: "Sigma-Aldrich has returned to UShop as a contracted supplier! Place your orders up to \$50,000 with complete electronic processing. See science bunch-out section".
- Need Help?:** A dark header section with a "Reach UShop on Teams" link, a "One U - Ushop Help Guide" link, and a "UShop HELP DESK" contact card with the phone number 5-2255 and email ushop@utah.edu.
- Action Items:** A yellow header section with a message: "There are no Action Items to display."
- My Purchase Orders:** A dark header section with a message: "There are no POs to display."
- My Resources:** A dark header section with links to "Campus Information Services (CIS)", "Grant Financial Authority (GFA)", "Training Materials", and "Voucher Lookup".

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

- Help document [One UShop](#)
- [Shopper Training](#) – How to Shop
- [Requisitioner Training](#) – Everything after shopping has occurred
- All 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 **columns** 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.


| | | | | | | | | | |
|--------------------------|--------------------|----------|------------------|----------------|--------------|-----------|--------------|-----------------------|--------------------|
| <input type="checkbox"/> | 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

U ShopTM MARKETPLACE

Rev. Nov, 3 2022 HH