

NOTE: Adding Comments is a crucial step in documenting the reason for actions taken and communicating with other users involved in a transaction in UShop. **It is important to understand that all comments made in UShop are permanent and viewable. Please be discrete and professional when adding comments.**

There are several ways to add comments:

1. Comments Tab in Cart

a. When a cart has proceeded to checkout, a series of tabs are available to the user. Click on the **Comments** tab.

The screenshot shows the UShop interface. On the left is a red sidebar with icons and a menu. The main content area is titled 'Requisition' with details: '2015-09-03 u0545906 01', 'Status: Draft', 'Document Total: 19.20 USD', and 'What's next for my order?'. Below this is a 'Comments' tab highlighted in yellow. To the right of the sidebar, the 'Comments' section has a dropdown menu set to 'Requisition' and an 'Add Comment' button. Below this, it says 'Records found: 0' and 'No comments have been added'.

b. Now click on the **Add Comment** button. This brings up a field in which you may type a message to the requisitioner to whom you will assign this cart. Click **Add Comment**. Your comment is now recorded and may be viewed in both the **Comments** tab and the **History** tab.

The screenshot shows a modal dialog box titled 'Add Comment' with a close button (X) in the top right corner. Inside the dialog, there is a text area with the placeholder text 'Please confirm that the quantity of desks ordered is correct'. Below the text area, it says '940 characters remaining'. Underneath, there is a section titled 'Attach file to this document (optional):' with a dropdown menu for 'Attachment Type' set to 'File', a text input for 'File Name', and a 'Browse...' button. At the bottom right of the dialog are two buttons: 'Add Comment' and 'Close'.

2. Comments Tab on Requisition

- a. When a requisition is submitted, a series of tabs similar to those seen in the cart are available to the user. Note that when a numeral in parentheses appears on the **Comments** tab, such as the (1) below, this means there is a comment which should be read. Click on the **Comments** tab.

Requisition
2015-09-03 u0545906 01

Status: **Draft**
Document Total: **19.20 USD**
[What's next for my order?](#)

Requisition >

Comments (1)

Attachment Overview

PR Approvals

PO Preview

- b. Here you can view the comment that was made previously. To make another comment, click on the **Add Comment** button.

Requisition
2015-09-03 u0545906 01

Status: **Draft**
Document Total: **19.20 USD**
[What's next for my order?](#)

Requisition >

Comments (1)

Attachment Overview

Comments
Document Actions History ?

Show comments for Requisition

Records found: 1

JOSHUA JOHN GIFFORD [Reply To] [New Comment]
Applies To: Requisition - 65934815
Comment Added - 9/3/2015 12:23 PM
Please confirm order

Add Comment

- c. Now that the order is in requisition workflow, the **Add Comment** button will provide not only a field for your comment, but also the option to email your message to one or more specific individuals.

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

☐ MARY LOUISE HUGHES (Prepared by)
<mlhughes@purchasing.utah.edu>
[add email recipient...](#)

I have confirmed the number of desks is correct.

952 characters remaining

Attach file to this document (optional):

Attachment Type

File

Add CommentClose

- d. You may select from the individuals listed by clicking the box next to their name, or click on **add email recipient** to select additional people. A **User Search** to help you select your email recipients.

User Search

Last Name

First Name

User Name

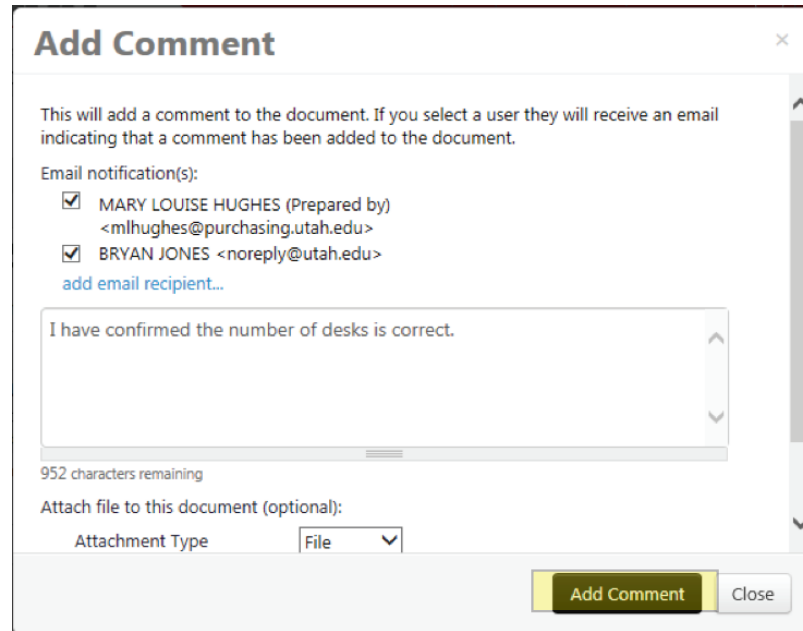
Email

Results Per Page

10

Search

- e. When the appropriate email recipients are selected and you have typed in your comment, click on **Add Comment**.

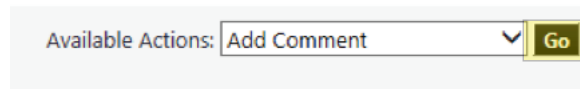


The 'Add Comment' dialog box contains the following elements:

- Title:** Add Comment
- Instructions:** This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.
- Email notification(s):**
 - ☒ MARY LOUISE HUGHES (Prepared by) <mlhughes@purchasing.utah.edu>
 - ☒ BRYAN JONES <noreply@utah.edu>
 - [add email recipient...](#)
- Comment Text Area:** I have confirmed the number of desks is correct.
- Character Count:** 952 characters remaining
- Attachment Section:** Attach file to this document (optional):
 - Attachment Type: File
- Buttons:** Add Comment, Close

3. Select Comment from the Available Options dropdown menu.

- a. A user may select **Add Comment** from the available actions dropdown menu in a requisition, and click **GO**.

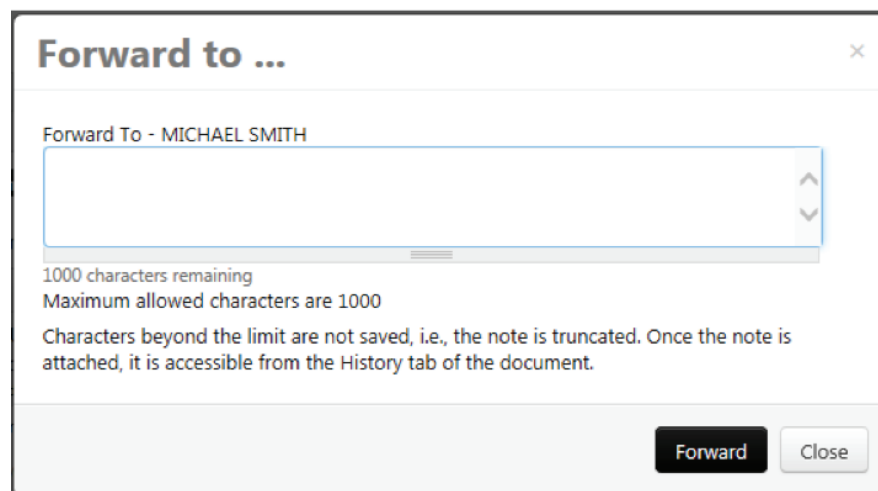


The 'Available Actions' dropdown menu shows 'Add Comment' selected, with a 'Go' button next to it.

- b. This takes you into the **Comments** tab. Follow steps 2b – 2e to add a comment.

4. A comment required with certain Available Actions

- a. A comment will be required when you select Available Actions that send the requisition to another specific user, such as **Forward to...** After you select the person to whom you will forward the requisition, a field will appear in which you must provide a reason for your action.



The 'Forward to ...' dialog box contains the following elements:

- Title:** Forward to ...
- Forward To:** MICHAEL SMITH
- Text Area:** (Empty)
- Character Count:** 1000 characters remaining
Maximum allowed characters are 1000
- Instructions:** Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.
- Buttons:** Forward, Close

5. Type in an explanation and click **Forward**.