1. As an Approver, you will receive notification indicating the need for approval on a requisition in two ways: the first is an email notification.

ushop@utah.edu   New Pending Approval for Requisition# 62933376

2. The header of the email will provide both account information and the requisition number

Acct Dist Shortcut: 02-91499 (UUH ENT 33A MINERS HOSP): (All Values) Approval Request for Requisition# 104744536

Dear NANCY CHRISTENSEN-MAYER,

The requisition listed below has been submitted for your approval.

Summary

Folder:	Acct Dist Shortcut: 02-91499 (UUH ENT 33A MINERS HOSP): (All Values)
Requisitioner:	KRISTIN JENNIFER KRAMER
Cart Name:	2018-06-19 u0569817 01
Requisition No.:	104744536
No. of line items:	1
Total:	**115.00 USD**

Details

UNIVERSITY GUEST HOUSE & CONFERENCE

University Guest House Room Reservation Order Form
Form Type: Non Catalog

Item 1

Description:	University Guest House Room Reservation Order Form
Confirmation Number:	R3ad72
Guest Name(s):	Kelly Alton
Additional Details:	Miners Hospital will pay $115.00. Guest will pay the remaining balance.
Catalog Number:	
Quantity:	1
Unit Price:	115.00 USD
Ext. Price:	115.00 USD
Size/Packaging:	
Taxable:	No
Commodity Code:	90110000
Form Total:	**115.00 USD**

3. The body of the email will contain a link that will take you right into UShop. (NOTE: this link in the email makes it easy to review and approve requisitions on your smart phone.)

Accounting Distribution

Acct Dist Shortcut::	02-91499 : UUH ENT 33A MINERS HOSP
BU::	02 : University Hospital & Clinics
Org::	91499 : UUH ENT 33A MINERS HOSP
Fund::	–
Activity::	–
Project::	–
Account::	02-65000 : TRAVEL:DOMESTIC
A/U::	–

Additional Information

Summary Details

|	
Hold Invoice for Approval:	No
Handling Code Override:	
Separate Payment Override:	
Payment Message:	
Require exact PO-to-Invoice match:	No
Prevent automatic PO distribution. Check box to manually distribute PO.:	No
Ad Hoc Approval 1:	
Ad Hoc Approval 2:	
Ad Hoc Approval 3:	
Ad Hoc Approval 4:	
Ad Hoc Approval 5:	
Comments:	(0)

View Requisition Approvals

4. The second kind of Notification is found on the upper tool bar of the UShop home page: a numeral in your **Action Items.** The **Action Items** is basically a work list for you in UShop. Click on **Action Items**.

5. A message will appear indicating that there are one or more Unassigned Approvals. Click on the message
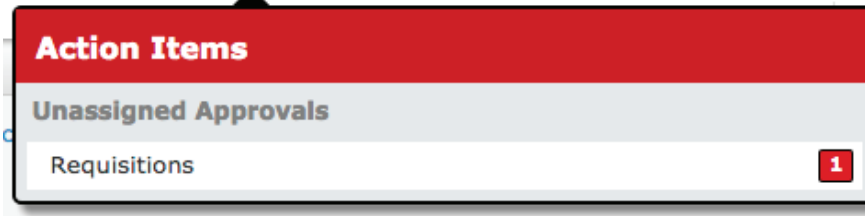
6. Now you can see a folder for each Accounting Distribution Shortcut containing the requisitions needing approval. Click on the folder name to open it.
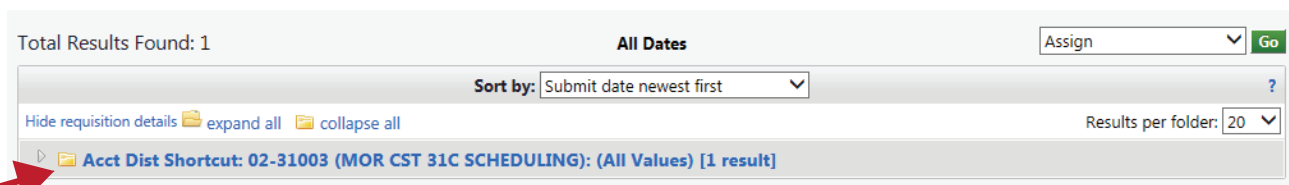
7. Inside the folder you will see one or more requisitions listed. Click in the box at the right side of the requisition line to select it. **NOTE:** If you are aware of this order and you know you can approve it without further review, you may select Approve/Complete Step in the Document Actions dropdown and click **GO** (See *15-b, page 5*).

8. If you wish to reserve this requisition for further review, you may assign the requisition to yourself, by selecting **Assign** in the drop down menu and clicking on the word **Go.**

9. Or by clicking on the black **Assign** button on the right side of the requisition line.

10. A message will appear to inform you that no documents are found in the current folder, namely, the folder containing Unassigned Requisitions Needing Approval. This is because once you assign requisitions to yourself, they will be found in a new folder labeled **My PR Approvals.**

11. To find this new folder, click on Action Items once again, and see that the requisition(s) that you've assigned to yourself are now located under *My Assigned Approvals.* Click on *Requisitions To Approve.*

Action Items

My Assigned Approvals

Requisitions To Approve   1

12. Inside the **My PR Approvals** folder you will find the requisition(s) you just assigned to yourself. Click on the requisition number to view the details.

Sort by: Submit date newest first ▼   ?

Hide requisition details 📁 expand all 📁 collapse all   Results per folder: 20 ▼

▲ 📁 **My PR Approvals [1 result]**

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action	☐
🔁 **104787402** 🔍	CHARTWELLS ⤢	MARY LOUISE HUGHES	6/20/2018 9:08 AM	RHONDA BALDWIN	65.00 USD	**Approve**	☐
Requisition Name	Nurse Residency Celebration		📁 Folders 0 Days in folder [My PR Approvals]				
No. of line items	1						

13. In the Requisition drop-down menu, under Summary, you can see sections that contain details regarding Shipping, Billing, Accounting Distribution, etc. Click the arrows to the left to expand each section and review the details.

Requisition: 104804011
2018-06-20 u0694363 02

Status: Pending
Document Total: **79.00 USD**

Requisition ⌄

Summary

General

Shipping

Billing

Accounting Distribution

Internal Notes and Attachm…

External Notes and Attachm…

Additional Approvals

Supplier Information

PR Approvals

Comments

Attachment Overview   1

PO Preview

Summary

> **General**

> **Shipping**

> **Billing**

> **Accounting Distribution**

> **Internal Notes and Attachments**

> **External Notes and Attachments**

> **Additional Approvals**

> **Lines**

14. Below the Requisition drop-down menu, click on the PR Approvals section to view the progress of the order in the requisition workflow.

Note that after a requisition is assigned to a specific approver in the workflow, that approver is the only person that may currently take an action on that requisition.

15. After you have reviewed the requisition, you may choose from several Document Actions as listed in the dropdown menu in the upper right corner of the screen. Click on the desired action.

    a. If you have multiple requisitions in your queue, the first option is **Approve/Complete Step and Show Next.** As you approve one requisition, the next will appear for you to review. If you find the order to be appropriate and allowable, select **Approve/Complete Step.**

    b. Select **Return to Shared Folder** if for some reason you decide not to review this requisition yourself. This will make the requisition available again for all potential approvers and another approver may assign this requisition to him/herself.

    c. Select **Place on Hold** if this is an order you do not want to discard but cannot place at this time. For example, an order may be placed on hold if funding is not currently available but is anticipated to be available in the future.

    d. Select **Return to Requisitioner** if the Accounting information is not correct. This action will take the order out of requisition workflow. Only a requisitioner may edit the accounting information in UShop. The requisitioner must then resubmit the order into requisition workflow.

    e. Select **Forward to…** if you want to send the order out of your queue and into that of another specific approver. This action will require you to indicate the person to whom you want to forward the order, and provide an explanation in a comment field that will appear. Keep in mind that when you forward a requisition, it leaves your queue to reside in the queue of the assignee.

    f. Select **Add Comment** if you want to communicate with another person or persons while the order remains in your queue. You will be prompted to select the person(s) to whom you want the message sent via email. A field will appear in which you may type your message. Remember that all comments in UShop are permanent and viewable and should therefore be appropriately businesslike.

    g. Select **Add Notes to History** if you wish to record information in the document that does not require an email message to specific persons.

    h. Select **Copy to a New Cart** if you wish to order these same items again.

    i. Select **Reject Requisition** if you find this order to be inappropriate or unallowable. This action terminates this order and will prompt you to provide an explanation that will be sent to the requisitioner when the cart is rejected.