

iShopUTRGV Quick Reference Guide

How to - Change the “Prepared For” (Travel Forms and Work Orders)

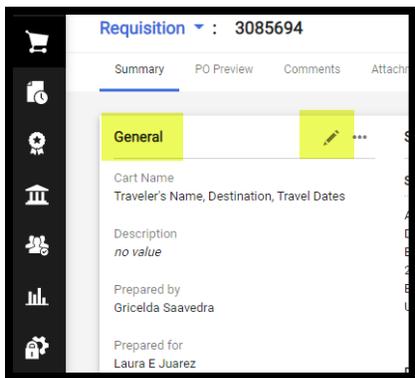
When an employee is requesting key access to a building or is traveling on behalf of the University, Supervisor approval is required. The supervisor field is autopopulated is tied the the “Prepared By” field based on their employee record in HR.

For questions regarding Work Orders, please contact ishop@utrgv.edu

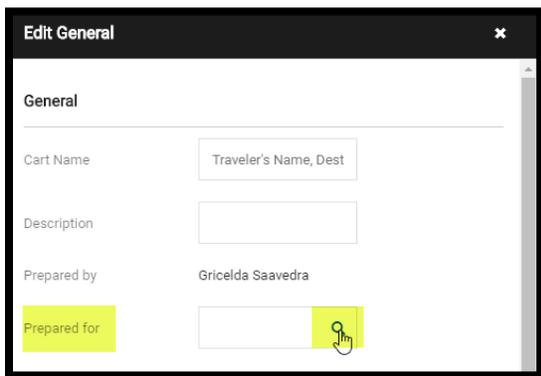
For questions regarding Travel, please contact the Travel Services Office at travel@utrgv.edu

Prior to submitting the cart to the workflow OR assigning the cart, the “Prepared for” field must be changed to the name of the Traveler/employee for which a Key is being requested.

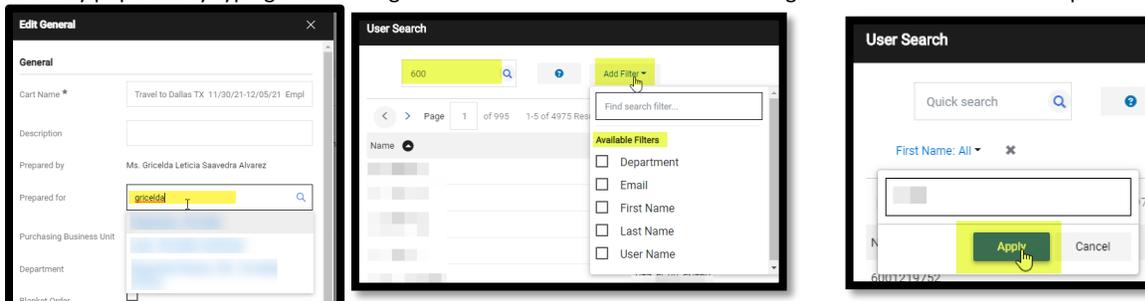
1. Click “Edit” under the “General” section



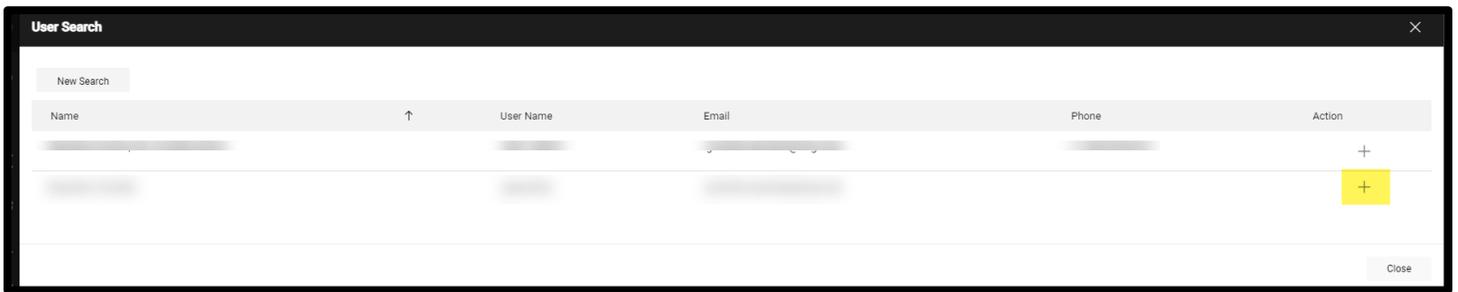
2. Under the “Prepared for” click on the magnifying glass



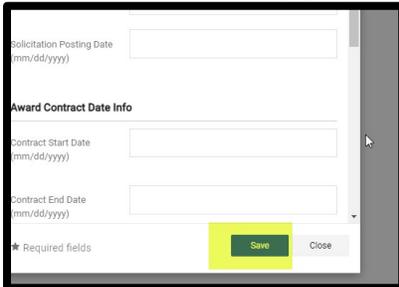
3. You may populate by typing or searching for the traveler’s name. When searching enter one of the available options and clicking “Apply”.



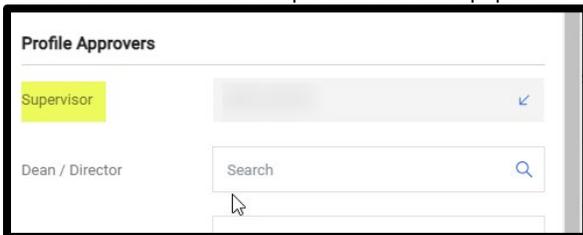
4. Click on “+” option to select the traveler’s name.



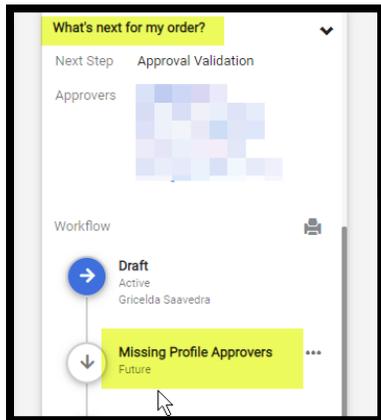
5. Confirm the traveler’s name populated under the “Prepared for” and click “Save”



6. Confirm that the Traveler’s supervisor has been populated



7. Note that if the traveler’s supervisor has not activated their iShop profile you will still see the “Missing Profile Approvers” displaying under the “What’s next for my order?” section.



If you are preparing a travel requisition for a Student or a Non-Employee/Non Student, the “Prepared for” should be populated with the name of the employee that is sending the Student to the trip or inviting the Non-Employee/Non Student to the trip.