iShopUTRGV Quick Reference Guide

How to - Approve a REQ

iShopUTRGV allows users with the "Approver" role approve requisitions. This role is granted only to cost center/project managers and their alternate approvers. Only one individual is required to approve the requisition. *Questions can be emailed to: ishop@utrgv.edu

- 1. Go to <u>http://my.utrgv.edu</u> and type in your UTRGV credentials.
- 2. Click "Sign In"



3. Click on the "PeopleSoft" Icon.

my TRGV	The Un Rio Gra	iversity of Texas nde Valley		🛔 Marilu Logout
Home My Account	My Finances	My Academics	Enrollment Reports	Help & Downloads
Hi				
Applications		Email		
ASSIST Office 365	Blackboard Print Print			
Handshake PT 250 PeopleSoft Oracle 24/7	FPT vSoftware			

4. Click on the "Jaggaer I Shop Sign In" Tile



5. iShop HomePage will load

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	Shop + Shopping Home + Shopping Dashboard				
2	Shopping Dashboard				
í o	🎽 Shop				Ø?
<u>o</u>	Simple Advanced Go to: Favorites Forms Small Purchase Order (Non-Catalog Item)	Quick Order Br	owse: Suppliers Cate	igories Col	ntracts Chemicals
血	Search for products, suppliers, forms, part number, etc.				Q
78					
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a 7	Organization Message C ? Showcases				Ø?
4	Quick Faterance Guides (QGRs) Training Videos				¥
	Forms: Exclusive Acquisition Justification (EAJ) Small Purchase Order Checklist Employee/Independent Contractor Checklist Subset Forms Change Log Phease use the latest version of the forms.	Substantiati (Require	C GPO: UTSSCA Incl	C Shipping	GPO: E&I

6. On the homepage of iShop, the "Action Items" link will display all pending approvals. Click on "Action Items."

	All 👻	Search (Alt+Q)	🚡 510.00 USD	2	* 1
Shop + Shopping + Shopping Home + Shopping Dashboard					
Shopping Dashboard			-		

7. The "Action Items" will display all requisitions that are "Unassigned Approvals." Click on "Requisitions"

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	Shop + Shopping + Shopping Home + Shopping Dashboard	Ac	tion Items						
-	Shopping Dashboard	M	My Assigned Approvals						
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õ	Simple Advanced Go to: Favorites Forms Small Purchase Order (Non-Catalog Item) Quick	Un	assigned Approvals						
血	Search for products, suppliers, forms, part number, etc.	Ch	ange Request			2			
컚		Or	ders						
հր		My	Returned Requisitions						

8. Approvals will appear in folders. If you have multiple Cost Centers, you will see different folders for each Cost Center. Click on the triangle to expand the folder.

			All 🔻	Search (Alt+Q)	🖹 510.00 USD 🛛 🛇 🛛	* * 1							
	Orders > Approvals > Requisitions to Approve > My Approvals - Requisitions												
	Group Results By: Folders >												
C	You are reviewing "Requisitions" a	approvals for the approver Mr. Jose A Valdez (6001137859) - Re	move from View Approvals fo	or List									
Q		Total Results Found: 22	All D	ates	Assign to Approver	∽ <mark>Go</mark>							
		•	Sort by: Submit date ne	west first 🗸 🗸		?							
俞	Filtered by	Hide requisition details 🚔 expand all 🛛 📔 collapse a	II		Results per fo	lder: 20 🗸							
	Type: Requisitions	🖹 🕒 Cost Center: 21000059 (Procurement)	: (All Values) [21 results]									
- <u>12</u> ,	Date Range: All Dates View Approvals Mr. Jose A For: Valdez	🔑 🕒 Cost Center: 21000060 (HUB Program	Office): (All Values) [1	result]									

9. Requisitions are shared between Cost Center Managers and Cost Center Alternate Managers so iShop requires for the Approver to "assign" the REQ prior to approval. Click the "Assign" button.

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	Orders + Approvals +	Requisitions to Approve	•	My Approvals - Requisitions								
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北	View Approvals For:	All Dates Mr. Jose A Valdez		Requisition No.	Suppliers:	Assigned Approver	PR Date/1	lime	Requisitioner	r Am	IOL * /	Action 🗆
հր	State Not Assigned	[remove all]		2741884 🗟 Resubmitted requisition	BIOMEDICAL SOLUTIONS INC	Not Assigned	8/20/2019 11	:36 AM	Mrs. Dimpna Busateri	15	5.00 USD	Assign
a 7				Requisition Name 2019-0 No. of line items 2	08-20 Blanket Order Co	orrect	🛅 Folders	71	Days in folder [Cost Center Values)]	: 21000059 (Procure	ent): (All	
\$	Filter My Approv	als ?		<i>2</i> 2671183 🕰	US BANK/VOYAGER	Not	5/29/2019 3:	00 PM	Jose Gamaliel Morales	150	0.00 USD	Assign

10. Once assigned, you may receive a notification stating "No Documents Found." This is because you have now assigned the REQ and no longer have "Unassigned REQs"

Group Results By: Folders 💙										
Filtered by		A No Documents found								
Type:	Requisitions	Requisitions : All Dates AND Not Assigned								

11. On the homepage of iShop, click the "Action Items" link again.

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	Shop Shopping Shopping Home Shopping Dashboard							
	Shopping Dashboard				-			

12. The "Action Items" now displays "My Assigned Approvals." Click on "Requisitions to Approve"

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8	Date Range:	All Dates				Purchase Orders			3
俞	View Approvals For:	Ms. Marilu Reyes				Unassigned Approvals			
fat	State	[remove all]				Purchase Orders			1

13. Approvals will appear in folders. You will notice that you have a folder titled "My PR Approvals." Expand this folder.

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	Orders + Approvals +	Requisitions to Appro	ve ► M	y Approvals - Requisitions									
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-22	Assigned Approve	(remove all)				Approver							
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ക	Filter My Approva	als ?		No. of line items 2	8-20 Blanket Order C	orrect	Folders	71 Days in	folder (Cost C Values)	enter: 21]	1000059 (Procure	ement): (A	

14. If you have reviewed the request, you can click on "Approve" to approve the requisition.

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122	Assigned Approve	[remove all]		Resubmitted requisition							
	Ms. Marilu Reyes			Requisition Name	2019-08-20 Blanket Order Correct 🔤 Folders 0 E			0 Days in folder [My PR Approvals]			
հե				No. of line items	2						

15. If you need to review the request, click on the REQ number.

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-122	For:	For: Reyes [remove all]		 2741884 (A) Resubmitted requisition 	BIOMEDICAL SOLUTIONS INC	Ms. Marilu Reyes	8/20/2019 11:36 AM	Mrs. Dimpna Busateri	15.00 USD	Approve	
հե	Ms. Marilu Reyes			Requisition Name No. of line items	2019-08-20 Blanket Order Corre 2	ct	🔤 Folders 0 Days	in folder [My PR Appr	ovals]		

16. Once the requisition is open, review the request. After determining how you would like to proceed, click on the "Available Actions" drop down menu to select "Approve/Complete Step".

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		Shin To		Bill To		Total (520.00 USD)	
Cost Center	eview (Jesus Zerpa)	Ship to		Biii 10		Subtotal	520.00
ubmitted 11/6/2020	:19 PM	Attn: Ms. Marilu Reyes Department Procurement Office BLDG/Room EUNFS 1.110		Accounts Payable - Office of Finance Policy 1201 W. University Drive	e and Public		520.0
art Name 2020-11-04	6001142907 01	1407 E. Freddy Gonzalez Drive		Edinburg, TX 78539		Approve	-