Hilltop Shop User Reference Guide

USF Approver

UNIVERSITY OF SAN FRANCISCO

Version 1.3
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Version	Changes	Date Created	Author
1.0	Initial version	8/6/17	Huron
1.1	Incorporated edits from PAAS	8/24/17	Huron; Janet Teymourtash
1.2	Minor Updates (screenshots and spelling)	10/16/17	JAGGAER (Squarebriggs)
1.3	Updates	12/19/17	J. Soulsby

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Overview of the Session

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2. About this Session
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About Our Learning Objectives

We have developed Learning Objectives to provide you with the necessary knowledge, skills, and attitudes to successfully use Hilltop Shop. Please refer to them as we proceed through training.

The general Skills, Knowledge and Attitudes that are expected once the learning objectives are accomplished are listed below.

Skills	What participants should be able to do by the time the course is completed.
Knowledge	What participants should know and understand by the time the course is completed.
Attitudes	What the participants' opinions will be about the subject matter of the course by the time it is completed.

Hilltop Shop Business Process

Learning Objectives

During this session, you will learn:
- ✓ Benefits Hilltop Shop will bring to the Procure-to-Pay process
- ✓ New practices and procedures for requesting products and services
- ✓ Departmental roles and responsibilities in Hilltop Shop
- ✓ Key capabilities of each role
- ✓ High level process overview

Benefits of Hilltop Shop

Efficiencies
- One system to accomplish all procurement activities
- One stop shop for catalog and non-catalog orders

Ease of Use
- Catalog content available with USF preferred pricing
- Catalog and non-catalog orders in the same system
- After-the-Fact payments to vendors

Visibility
- Purchasing and payment information in one place
- Complete history per transaction showing who, what and when a transaction was created/modified
- Data export capability

Compliance
- Ability for departments to increase compliance using workflow
- Ability to ensure purchasing compliance with USF policy

Speed
- Orders are electronically sent to the supplier as soon as approval steps are complete
- Orders dispatched to vendors in real-time
- Quick order turn-around from catalog enabled vendors

Cost Savings
- On contract spend
- Increased spend visibility will lead to better supplier pricing

Communication
- Use of internal notes, comments and attachments to others involved in processing the purchase
- Use of external notes to communicate with suppliers

New Practices and Procedures

- ➢ Except those noted as out-of-scope in the USF Procurement Policy, all university related expenditures will be purchased through Hilltop Shop.
- ➢ All University employees (“Shoppers”) can access Hilltop Shop through myUSF.
- ➢ Hilltop Shop allows departments to purchase goods or services from pre-negotiated contracts and buying agreements.

- Requestors can place Hosted Catalog and Punch-Out Store orders up to $500 without additional approvals.
- If you can't find the item or service required, users will submit a **Non-Catalog** or **Service Request** form.
- A Shopper, Requestor or Approver associated with the purchase order (PO) will be required to post receipts for all goods and services $500 and over. Please note: The receipt is required to pay the Vendor.
- Receipts are not required on purchases less than $500. If desired, users may post receipts on all transactions, however, the Vendor will be paid regardless if a receipt is posted or not. If a Vendor has not satisfactory fulfilled PO obligations, please refer to the Quick Reference Guide titled Managing Invoice Exceptions.
- Receipt of goods or services will serve as a confirmation that the vendor has fulfilled their obligation and all associated invoices are "Ok to pay".

Departmental Roles in Hilltop Shop

Roles & Capabilities

All users in Hilltop Shop will have an assigned role. Each role has assigned permissions allowing a user to perform specific functions in Hilltop Shop. The table below provides a high-level summary of the basic functions each role can perform in Hilltop Shop.

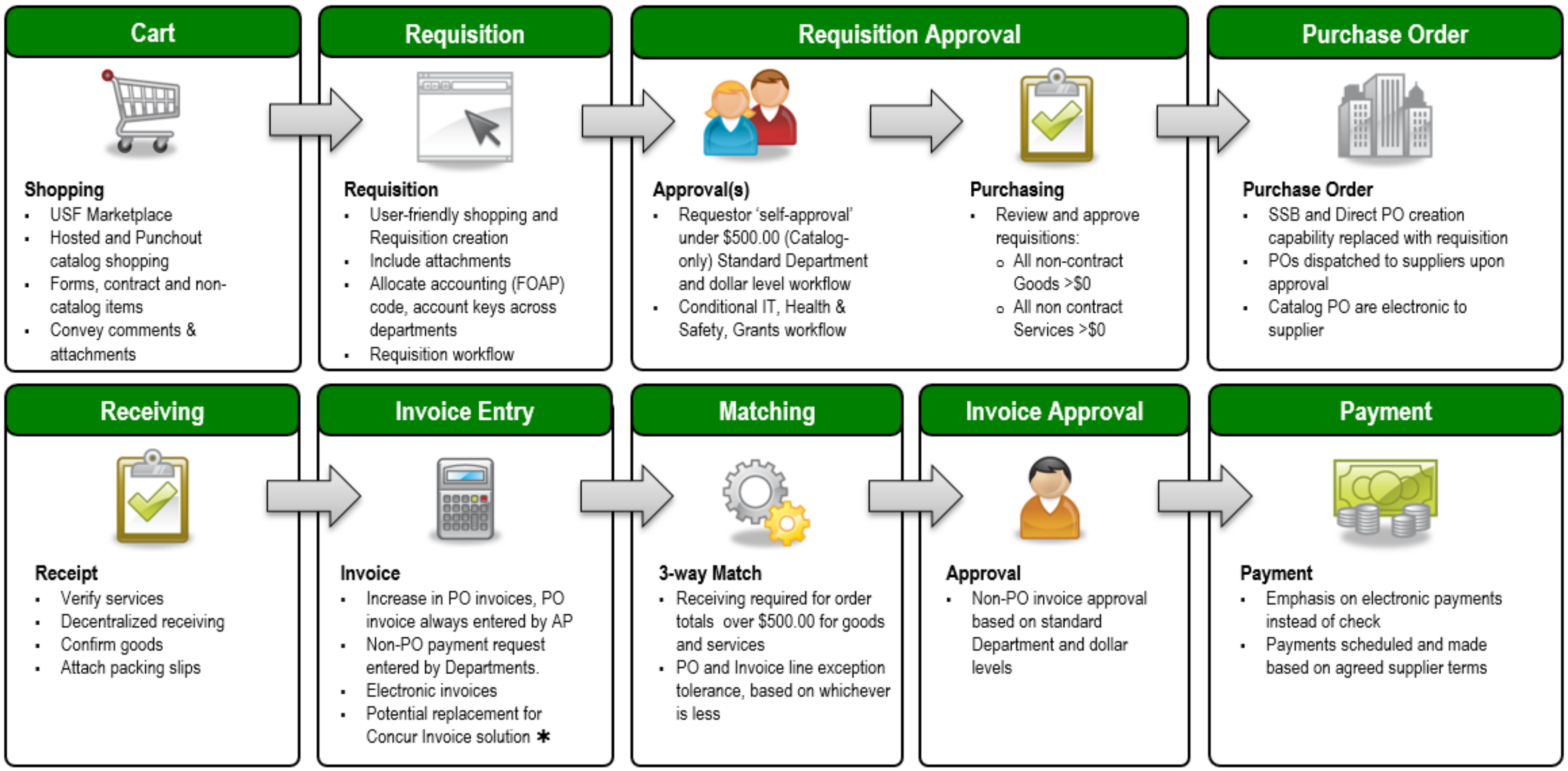
	Capabilities/Functions											
Role	Create Cart	Assign Cart	Submit Cart	Appv/ Reject / Return Req	Edit Req in WF	Edit PO	Create Receipt	Create Invoice	Resolve Match Excep.	Appv/ Reject/ Comment Invoice	Request New Vendor	Appr Vendor Request
Shopper	✓	✓					✓					
Requestor	✓	✓	✓				✓				✓	
Approver	✓	✓	✓	✓	✓		✓				✓	
Specialty Approver	✓	✓		✓	✓		✓					
PaAs Ops	✓	✓	✓	✓	✓	✓	✓				✓	✓
A/P Ops	✓	✓						✓	✓	✓	✓	
Invoice Approver	✓	✓							✓	✓		

Details

Role	Description	
Shopper	Shop/create carts in Hilltop Shop Assign Carts to Requestor. (Shopper must know to whom to assign the cart) On PO greater than $500, confirms Vendor has fulfilled the order by posting the receipt Optional: Can convey comments and funding instructions	
Requestor	Role is assigned by Budget Manager Can shop for department up to $500 from hosted catalog or punch-out store without additional approvals. Receives assigned/submitted carts from Shoppers Can edit the Cart before submitting into requisition workflow Must have knowledge of proper chart field use and responsibility for proper FOAP assignment Confirms all requisition information is accurate, complete and complies with policy and funding requirements On PO greater than $500, confirms Vendor has fulfilled the order by posting the receipt	
Approver	Role is assigned based on Banner approval queues Can shop and submit requisitions without assigning carts to Requestor Review requisitions for compliance and budget availability on unrestricted funds Confirms requisition information is accurate, complete and complies with the policy and funding requirements Ability to edit requisition within workflow Ability to approve, return, or reject requisition. On PO greater than $500, posts receipts to authorize payment to vendor	
Specialty Approver	Role assigned based on Hilltop Shop workflow rules (not Banner) Reviews and confirms requisitions for compliance Ability to edit requisition within workflow Ability to approve, return, or reject requisition Assigned based on Jaggaer workflow rules (not Banner) Role can shop, however Specialty Approvers must assign carts to a Requestor for review	
Purchasing Ops	Submit requisitions that are cross charged across multiple department FOAPs Confirms requisitions comply with USF Procurement Policy Approve, return, reject and edit requisitions within workflow Completes change orders and cancellations requests Create and manages formal Sourcing Events	

	Create and manages procurement related contracts and buying agreements Views Vendor profiles Vets and approves Vendor registrations	
Accounts Payable	Enter, review and approve vouchers/credit memos Sets up prepays and recurring payment schedules Review and approve match exceptions scenarios for tax exceptions and 1099 reporting Reject/Cancel Invalid Vouchers Review and approve all after-the-fact payment requests	
Invoice Approver	This role is typically the Budget Manager/Director within the Business Unit. Works with Shoppers and/or Requestors to resolve all match exceptions When appropriate, works with non-catalog vendors to correct erroneous invoices	

High Level Business Process



The High-Level Business process shows each of the major steps that are performed in the end-to-end process from shopping through review, authorization, approval, ordering, receiving, invoice processing, exception management and payment

About the Approver Role

Overview

Approvers are responsible for reviewing requisitions submitted by department Requestors. Approvers are notified of new requisitions requiring approval by email and can utilize Hilltop Shop, email, or the Jaggaer mobile application to review and approve each request. Approvers can also utilize Hilltop Shop to make changes to requisitions, add attachments, and communicate directly with Shoppers and Requestors through comments.

Hilltop Shop Approvers have responsibilities to ensure purchase and after-the-fact payment requests are appropriate, complete, have accurate funding (FOAP) assigned, and are in alignment with USF Procurement Policy. In general, Approvers will need to become familiar with procurement practices and policies that apply to the requisitions they process. Additionally, Approvers must confirm that all Requisition information is accurate, complete and complies with the relevant policy and funding requirements.

Responsibilities

Requisition Approval Management

- Receive requisitions to review and approve through the system's automated workflow
- Monitor and maintain your 'Worklist' of assigned requisitions requiring review
- Edit items and form contents as needed
- Review and add comments, notes, and attachments
- Return incomplete, out of policy, or unnecessary requisitions to Shoppers
- Shop and create requisitions without a Shopper being involved

Requisition Quality

- Edit all aspects of the requisition, including both the Catalog and Forms items prior to approval
- Ensure line item descriptions are specific and detailed enough to properly describe the item or service being requested (i.e.: Do not enter "Business Cards"; rather enter "Business Cards for Jane Doe")
- As a best practice, keep items using Forms in a separate cart from Hosted Catalog and Punch-Out Stores

FOAP Coding

- Understand department specific policies on how FOAPs should be utilized for purchases
- Validate the appropriate FOAP information and other essential funding information
- Adjust FOAP information or return to the Requestor when a requisition is charged against an incorrect fund
- Ensure proper budget availability
- Know when it's appropriate to split orders across multiple FOAP strings and limiting FOAP splitting to no more than 4 splits per order

Necessary Documentation

- **Quotes/Bids:** Ensure requisition complies with USF Procurement policies for quotations and competitive bidding and appropriate documentation is attached to the requisition
  - Up to $5,000 - Pricing should be reasonable but there is no requirement to solicit a quote or proposal
  - $5,000 to $25,000 - Obtain a quote or proposal from at least 2 qualified sources

   - $25,000 to $50,000 - Obtain a quote or proposal from at least 3 qualified sources
   - Above $50,000 - Formal sourcing event (RFx) is required. Please contact Purchasing and Ancillary Services
- **Sole Source Justification:** Demonstrate the purchase from a particular vendor is sufficiently justified as sole or single source when quotations or competitive bids are not acquired
   - Requester should complete the Sole/Single Source Justification section on the following forms:
      - Non-Catalog Requisition
      - Service Order Requisition
      - After-the-Fact Payment
      - Independent Contractor
- **Pre-Payments:** Though pre-payments are not typically acceptable, in rare instances some vendors may require a deposit prior to fulfilling a Purchase Order. In these instances, the Requestor is responsible to ensure the following documentation and comments are provided.
   - Attach a pro-forma invoice provided by the vendor outlining the applicable payment schedule
   - Ensure the "Prepayment Required" checkbox in the General section on the Requisition is checked (Note: the pre-payment will not be processed if this checkbox is not properly set on the requisition
   - Provide an explanation of why a pre-payment is necessary for the purchase
- **Purchases Crossing Fiscal Year:** Towards the end of the USF fiscal year, purchases may get placed the will not be fulfilled nor invoiced until the next fiscal year. In these instances, the Requestor is responsible that the purchase is coded to the correct accounting date in Hilltop before submitting the requisition. Exercise 12 includes steps for adjusting the accounting date on the requisition.

Self-Approval Threshold

The implementation of Hilltop introduces a new concept to USF being a self-approval threshold. The self-approval threshold is simply a rule where certain types of purchases under a specific dollar threshold will not require departmental approval from a Business Manager or higher.

- New Procurement Policy allows Requestors to place Hosted Catalog or Punch-Out Store orders up to $500 without additional departmental approval
- Hosted Catalog or Punch-Out orders over $500 and all requisitions created from a form (i.e., non-catalog, service, payment, etc.) will require a departmental approval regardless of amount.
- Specialty Approvals (i.e., ITS, Facilities, EH&S, Grants, etc.) will be required depending on the nature of the purchase. The rules for specialty approvals is covered in a later section

Requisition Approval Workflow (Departmental)

Hilltop Shop utilizes automated workflow to route purchase requisitions through departmental workflow based on the assigned FOAP and total amount of the requisition. The table below outlines the type of departmental approvals that are required per dollar threshold.

Approval Required	Expenditure Threshold
Requestor Specialty Approval (if required)	Hosted Catalog & Punch-Out Store purchases up to $500
Business Manager Specialty Approval (if required)	Hosted Catalog & Punch-Out Store purchases $500-$5,000.
Business Manager Specialty Approval (if required)	Non-catalog purchases up to $,5000
Business Manager Specialty Approval (if required) **Plus**: **For Non-Provost Units:** Assistant or Associate Vice President, Athletic Director **For Provost Units:** Dean and Associate Vice Provost	All purchases greater than $5,000 **Note:** **Non-Provost Units**: With the approval of the respective divisional Vice President and the Vice President for Business and Finance, threshold values can increase up to $50,000,
Business Manager Specialty Approval (if required) **Plus:** **For Non-Provost Units:** Respective Divisional Vice President **For Provost Units:** Vice Provost for Planning and Budget	All purchases greater than $10,000

Specialty Approval

In addition to departmental approvals, certain Specialty Approvals will be required on requisitions that meet certain conditions regardless of the value.

Approval Required	Scenario
Grants Approval	Purchases made against a Grants fund (funds beginning with a "4")
ITS	Purchases made for information technology, including systems, hardware or software purchases
Environmental Health & Safety	Purchases of hazardous materials or chemicals
Furniture	Purchases for furniture, fixtures or equipment (FF&E)
Appliances	Purchases for appliances (i.e., refrigerator, microwave, heater, A/C, etc.)
Branding, Marketing or Advertising	Purchases for marketing collateral, advertising or branding (logo).
Office of the General Counsel (OGC)	Any procurement related contract or agreement (SLA, MSA, etc)
Sourcing	Purchases > $50,000 requires Formal Sourcing Events (RFx)
Procurement	Non-Catalog Orders New Orders: Name Badges and Business Cards Purchases > $5,000 Procurement related contracts or buying agreements Purchases with blank commodity codes Change Order and Cancellation requests
Accounts Payable	After-the-Fact Payment form is used

Hilltop Shop Exercises

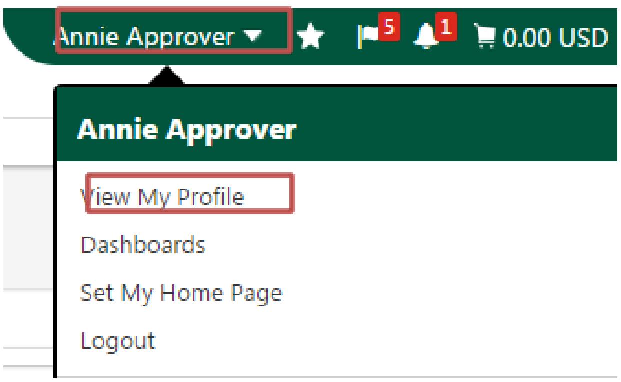
Profiles in Hilltop Shop allow you to make the buying and paying process more efficient and customize your user experience by allowing you to save default information, shipping addresses, frequently used fund and account codes, cart assignees, notification preferences and email approval options. Note, some of the values in your profile are maintained by the system administrators and cannot be changed – these include user roles, permissions, order settings and approval settings.

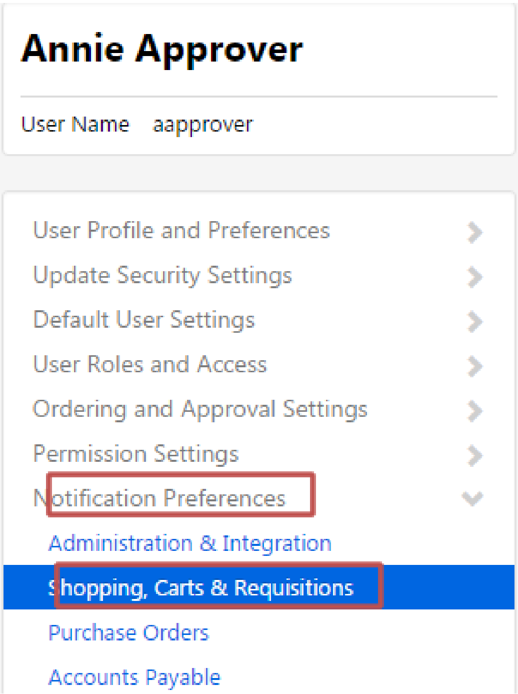
In this section of the course you learn to perform the following:

- Exercise 1: Adjusting Notification Preferences
- Exercise 2: Setting Favorite Pages

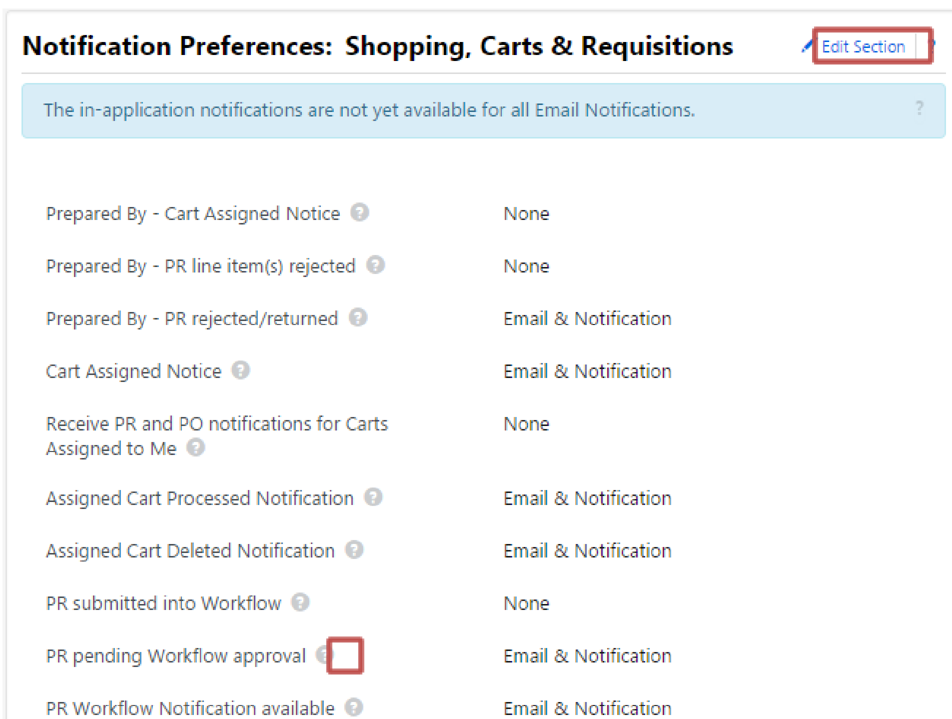
Exercise 1: Adjusting Notification Preferences

By default, Approvers will receive notifications through both e-mail and in-app notifications (direct in Hilltop Shop) when a requisition requires approval. Some Approvers may review and approve requisitions on a frequent basis whereas others may only be required to approve a requisition very infrequently. Frequent Approvers may find email notifications to be unnecessary if you are reviewing and approving requisitions daily and frequently check your approval queue within Hilltop Shop. The exercise below shows how Approvers can modify their default notification settings to best meet your individual needs to be notified of new requisitions to approve.

Step	Description
1	Log into Hilltop Shop Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on
2	From the Hilltop Shop home page, click your name in the dashboard located in the top right and select **View My Profile** from the menu. 
3	Click on **Notification Preferences** and then **Shopping, Carts & Requisitions**. A list of notifications will appear in the right window pane.



4 You will see a list of system notifications along with the current setting for each notification. As you are scanning the notifications, use the question mark icon to assess what each notification controls. Select the **Edit Section** link in the top right corner to make changes to your notification preferences



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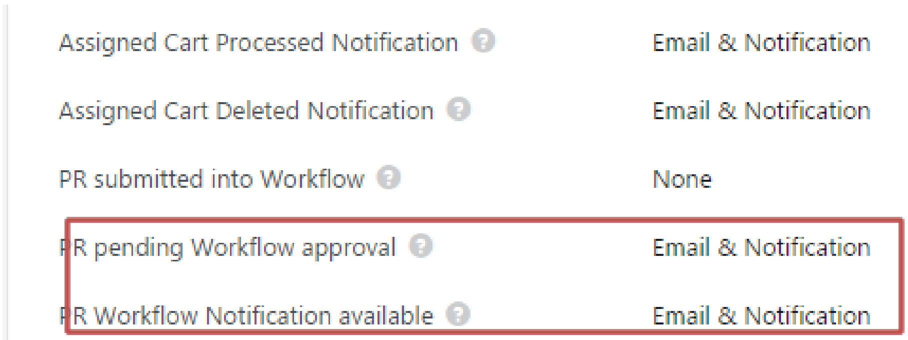
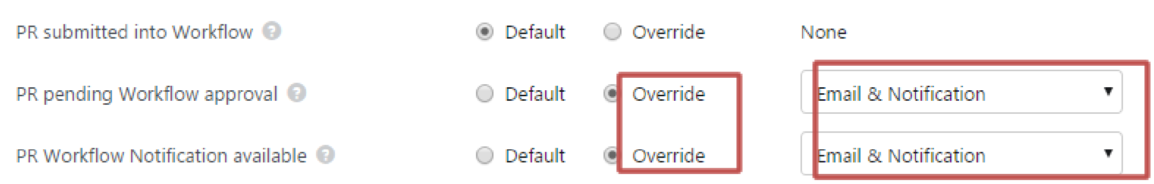
The notifications specific to Requisition approval are the following:
- PR pending Workflow approval
- PR Workflow Notification available



6

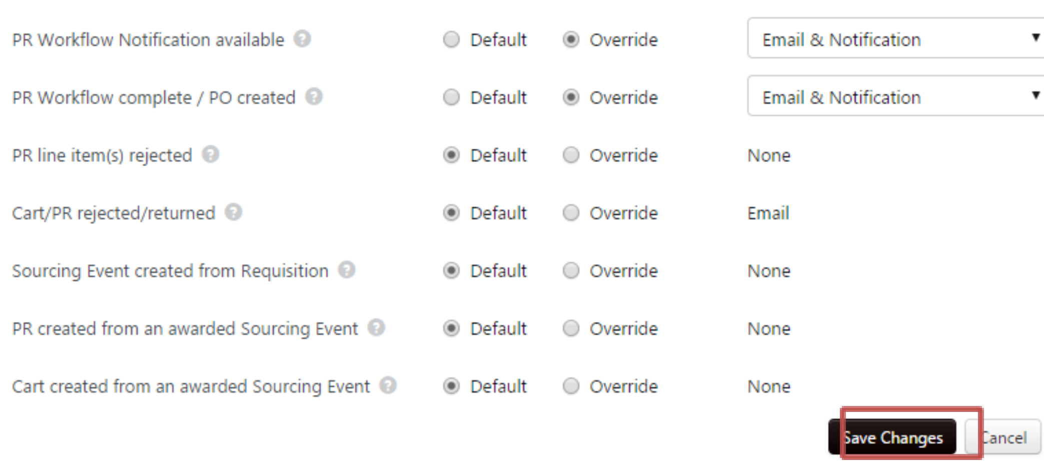
To change a notification, click on the **Override** button and select the preferred options which include: **Email**, **Notification**, **Email & Notification** or **None**.

The **Email** option triggers outbound emails to your USF email address when the event occurs. **Notifications** trigger Hilltop Shop system notifications that are only viewable in the Dashboard menu under **Notifications**.



7

Click the **Save Changes** button to save your preferences.

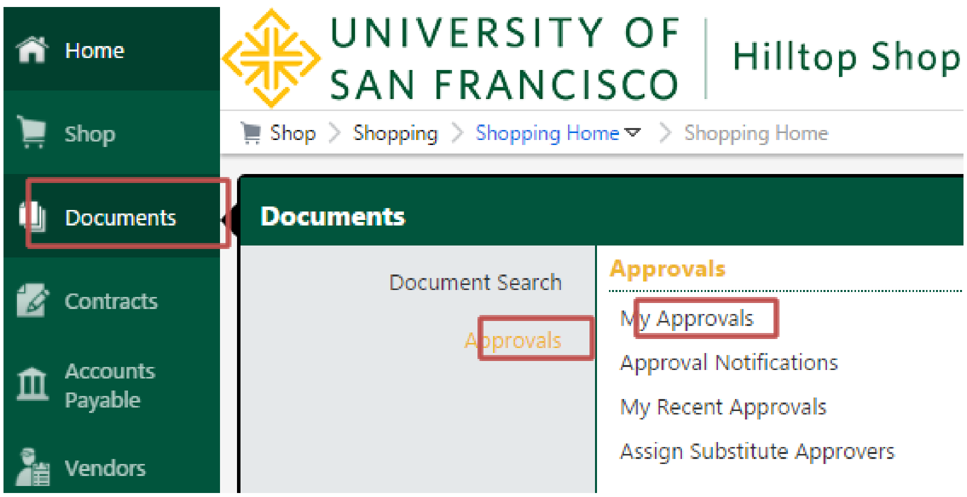


Exercise 2: Setting Favorite Pages

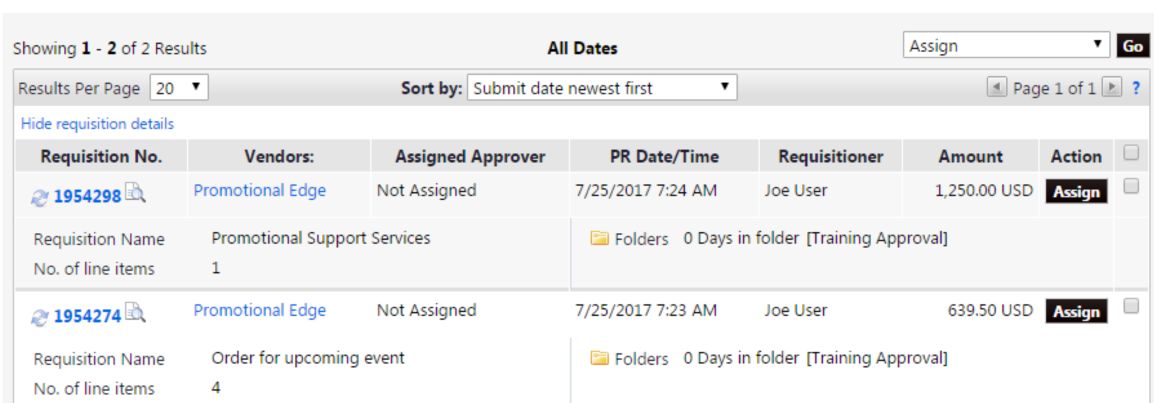
As an Approver one of your primary responsibilities will be to review and maintain your queue of requisitions requiring your approval. As a result, you will likely spend a significant amount of time in Hilltop Shop managing your approval queue. To save time, you can set this page as a favorite so you do not have to click through the options on the left navigation bar each time you want to access this page. The steps below will show you how to set this as a favorite page which will allow you to access it with minimal mouse clicks.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Log into Hilltop Shop

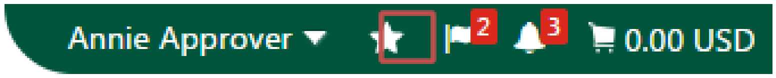
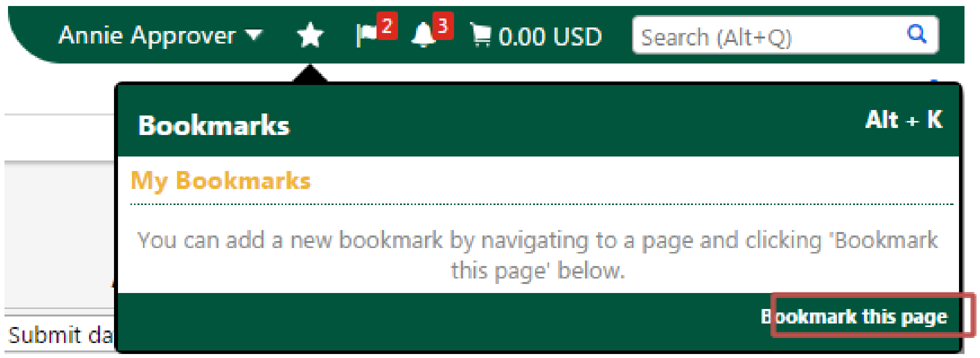
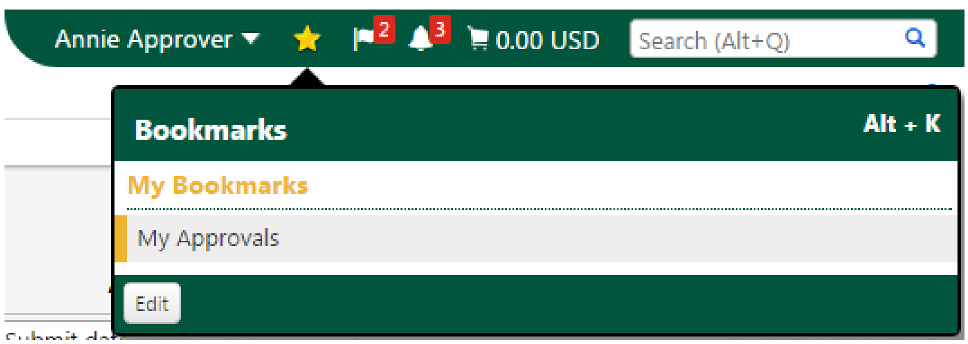
Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on</td></tr>
<tr><td>2</td><td>From the home page, click on Shop from the left side navigation bar, click on Documents, click on Approvals, then click on My Approvals



</td></tr>
<tr><td>3</td><td>You are now on the screen that shows the list of requisitions awaiting your approval



</td></tr>
<tr><td>4</td><td>At the top of the screen, click on the star icon next you to your name.</td></tr>
</table>

	
5	Your **Bookmarks** listing will expand. Click on the link to the lower right titled **Bookmark this page**. 
6	This page is now saved in your **Bookmark** and you can now directly navigate to it by click on the link. Notice the star icon color is now yellow indicating you have a saved bookmark. You can bookmark as many pages as you wish. 

Finding and Managing Approvals

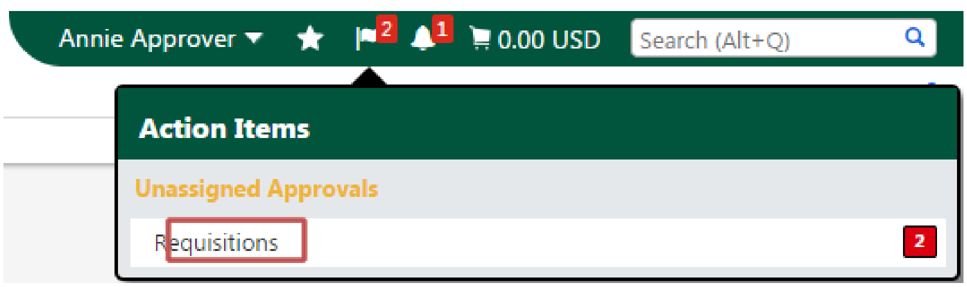
In this set of exercises, you will learn how to find, manage, and navigate your queue of requisitions requiring your approval. Hilltop Shop offers several methods to help Approvers get notified when a requisition is dropped into your queue for approval including email notifications, in-app notifications, and action items. Additionally, Hilltop Shop offers several options to help Approvers filter and sort your approval queue so you can quickly find requisitions that meet a certain criteria.

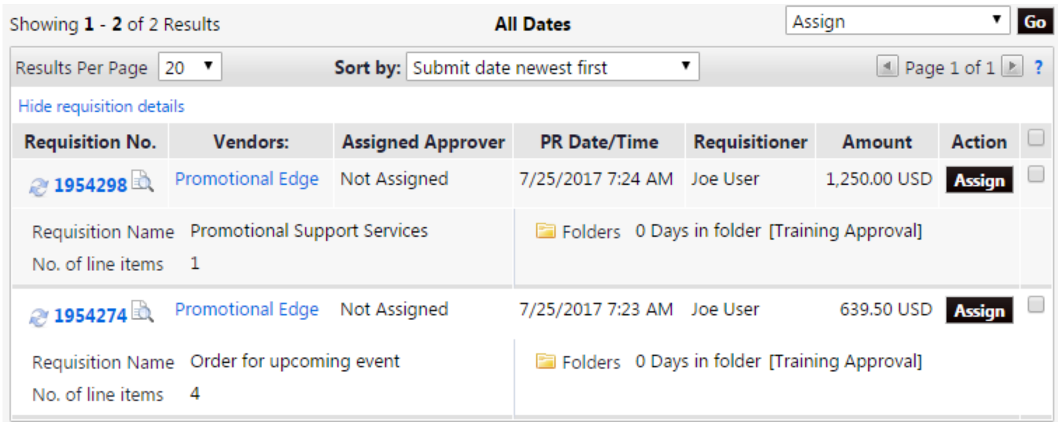
In this section of the course you learn to perform the following:

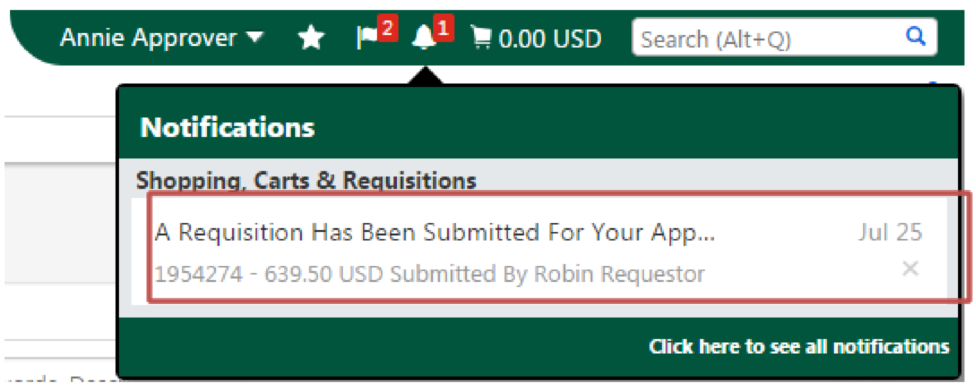
- Exercise 3: Action Items & Notifications
- Exercise 4: My Approvals Page
- Exercise 5: Navigating & Filtering My Approval Page

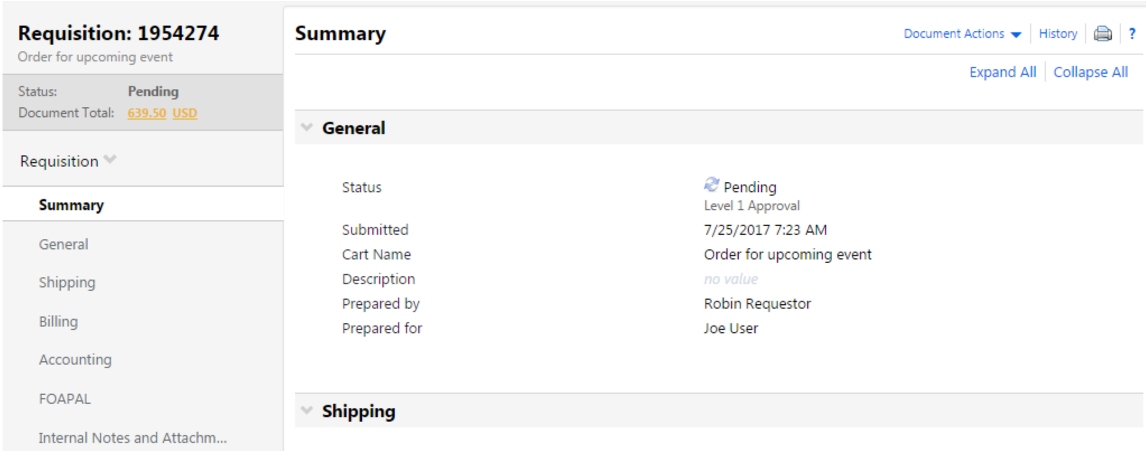
Exercise 3: Action Items & Notifications

Upon logging into Hilltop Shop, Approvers can quickly evaluate how many approvals are awaiting review an can navigate to the list of requisitions through the Action Items (flag icon) and Notifications (bell icon) links located on the top navigation bar.

Step	Description
1	Log into Hilltop Shop Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on
2	If a requisition is waiting for your approval, you will see numbers next to your Action Items (flag icon) and Notifications (bell icon) in your top navigation bar. Note: You will only see the in-app notifications if you keep the notifications turned on in your user preferences. 
3	Click on the Action Items icon (flag icon). 
4	A pop-up window will open showing the type and number of documents that are awaiting your approval. Click on the **Requisitions** link to navigate directly to the list of requisitions that are awaiting your approval. 
5	You will be taken to the list of requisitions that require your approval.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>6</td><td>The in-app notifications will direct you directly to a specific requisition to review. In your top navigation bar, click on the click on the Notifications icon.

</td></tr>
<tr><td>7</td><td>A pop-up window will appear showing the most recent requisitions requiring your approval that you have not reviewed. Click on a notification.

</td></tr>
<tr><td>8</td><td>You will be taken directly to the requisitions details screen where you can review the contents of the requisition</td></tr>
</table>

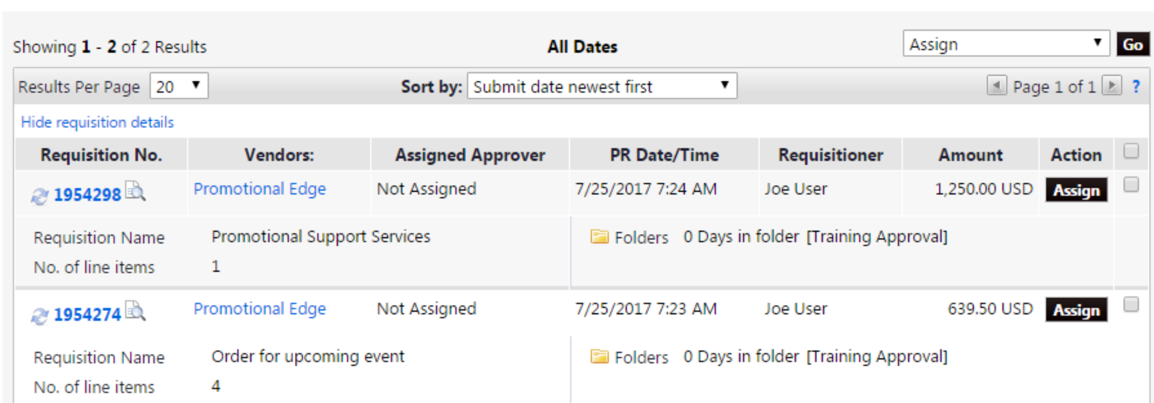

Requisition: 1954274
Order for upcoming event
Status: Pending
Document Total: 639.50 USD
Requisition
Summary
General
Shipping
Billing
Accounting
FOAPAL
Internal Notes and Attachm...
Summary
Document Actions
History
?
Expand All
Collapse All
General
Status
Pending
Level 1 Approval
Submitted
7/25/2017 7:23 AM
Cart Name
Order for upcoming event
Description
no value
Prepared by
Robin Requestor
Prepared for
Joe User
Shipping

Exercise 4: My Approvals Page

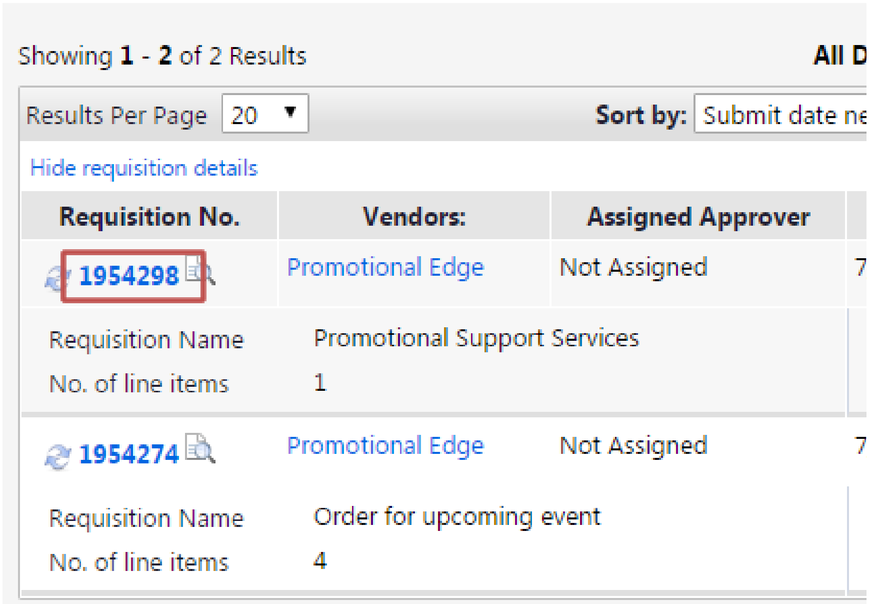
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Log into Hilltop Shop

Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on</td></tr>
<tr><td>2</td><td>From the home page, click on Documents from the left side navigation bar, click on Approvals, then click on My Approvals

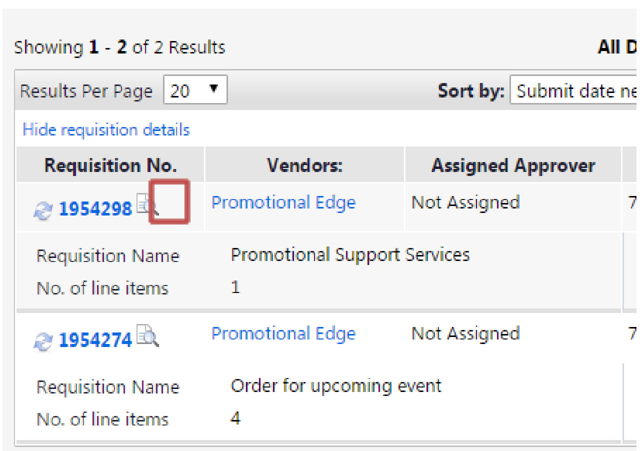
</td></tr>
<tr><td>3</td><td>You are now on the screen that shows the list of requisitions awaiting your approval.

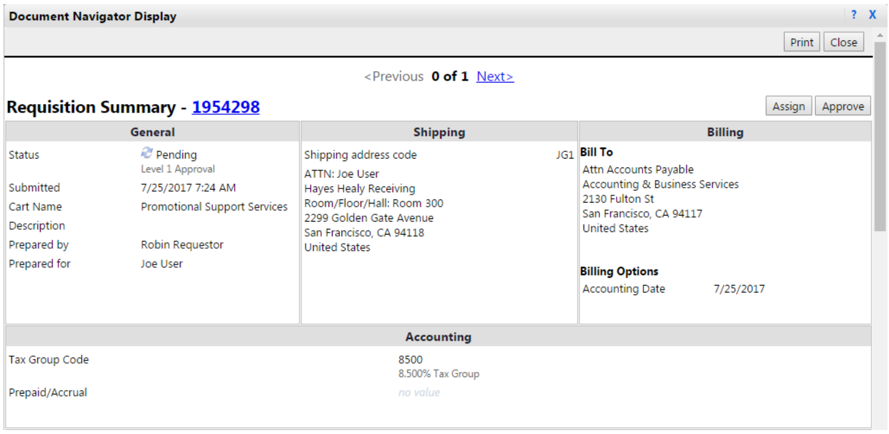


</td></tr>
<tr><td>4</td><td>Other than viewing the list of requisitions requiring your approver. This screens allows approvers to perform several actions outlined in the steps below.</td></tr>
<tr><td>5</td><td>Clicking on a requisitions number fill take you directly into the Requisition details</td></tr>
</table>



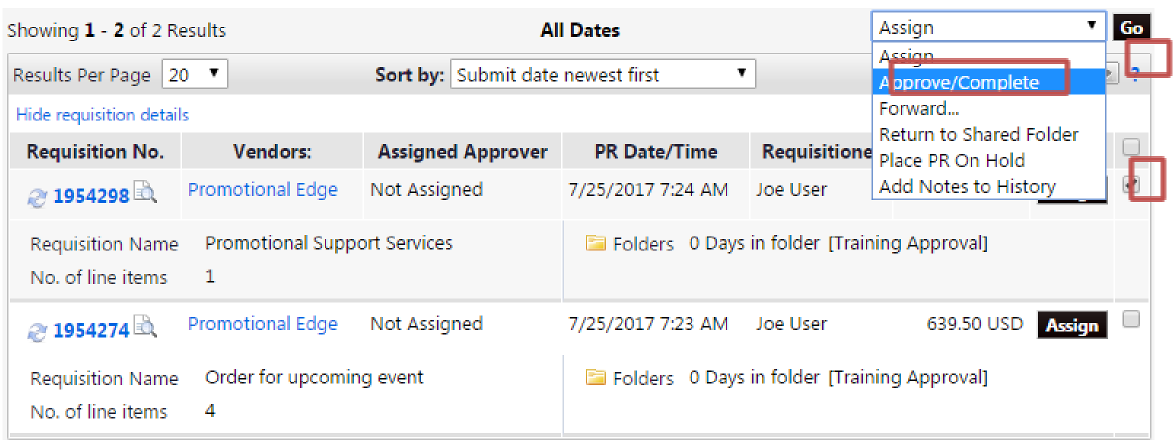
6 Clicking on the magnifying glass icon will open a preview page where Approvers can view summary details of the requisition.





7 Approvers can approve requisitions directly from this screen as well by place a check mark next to each requisition you would like to approve.

Then click on the drop down menu in the top right corner of the screen, select the **Approve/Complete** option, then click **Go**



Exercise 5: Navigation and Filtering My Approvals Page

<table>
<tr><th>Step</th><th>Description</th></tr>
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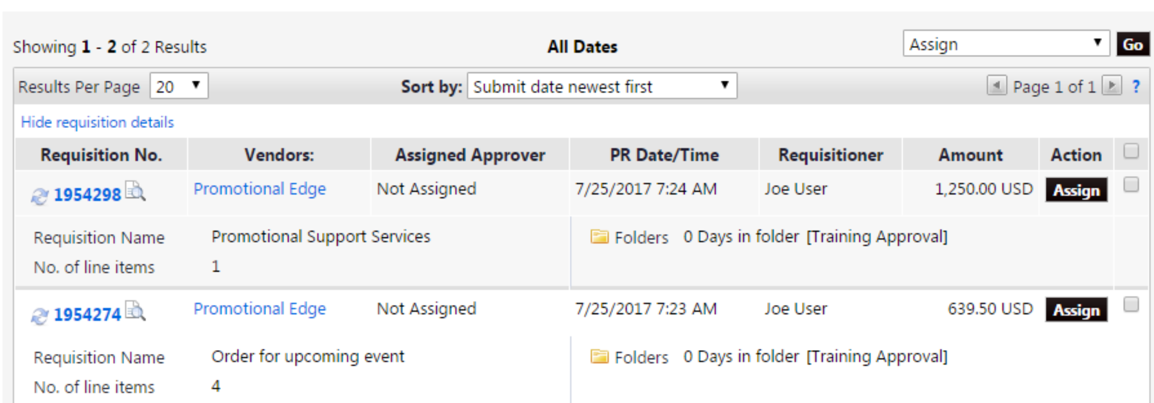
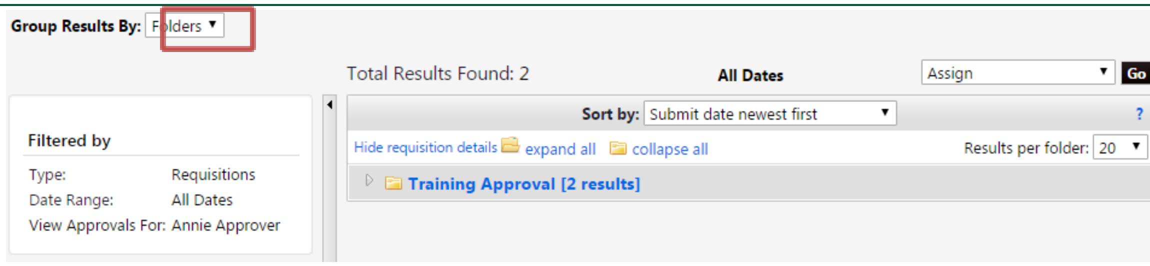
<tr><td>3</td><td>You are now on the screen that shows the list of requisitions awaiting your approval

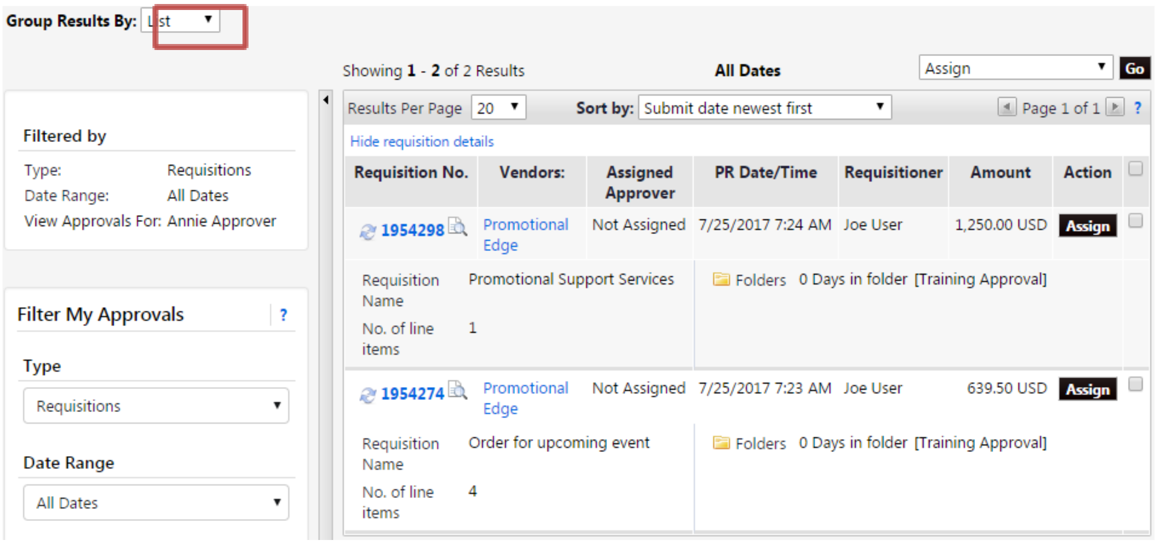


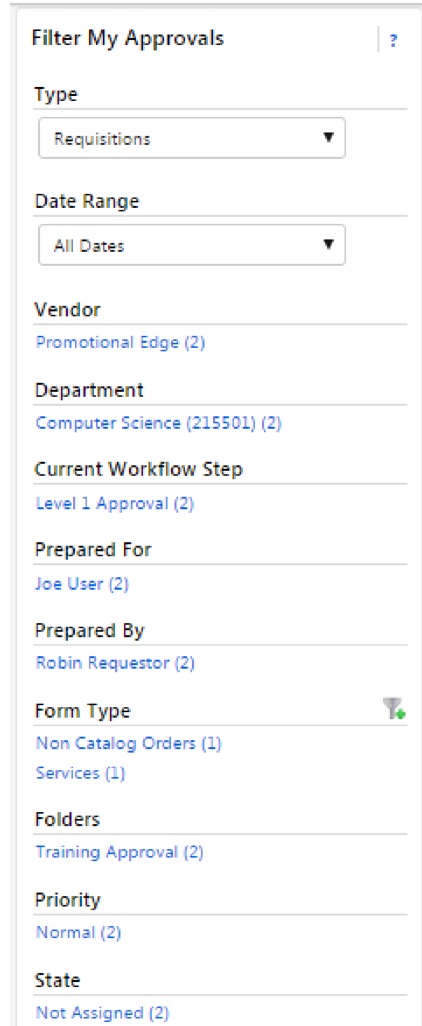
</td></tr>
<tr><td>4</td><td>Within the PR Approvals screen, you can adjust how requisitions are grouped and displayed by using the Group Results by drop down found in the top left of the screen.

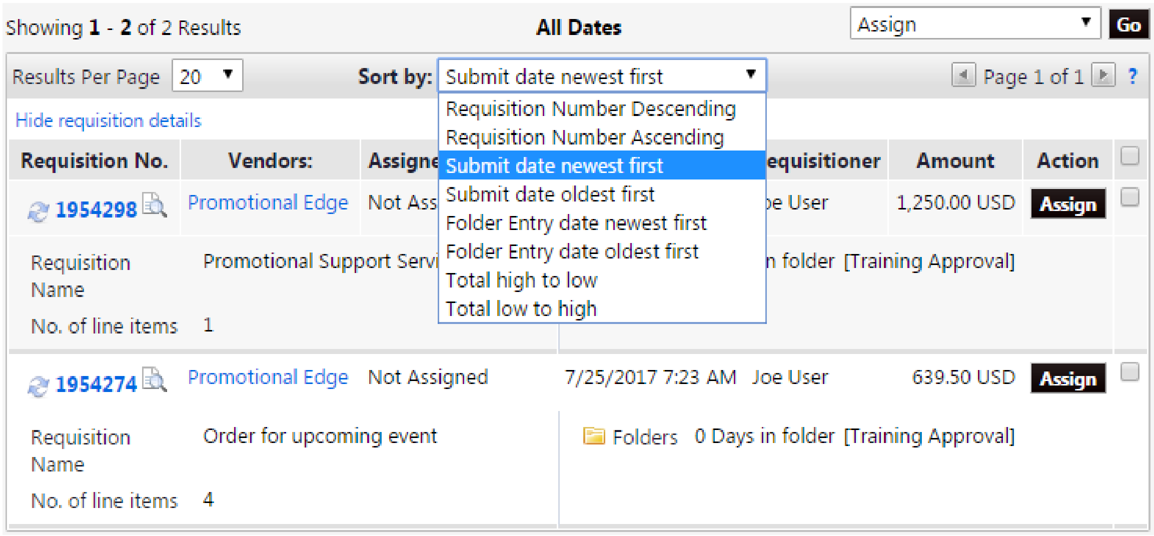
Folders shows the pending approvals by department org approval queue.</td></tr>
</table>



List shows all pending approvals in an expanded list view.



5	You can also filter the list to only show specific requisitions that meet the criteria you filter by **Type:** Allows you to filter the list by document type. Typically, you will keep this on **Requisitions** **Date Range:** Allows approvers to focus on approvals based on the creation date of the requisition **Vendor**: Filter by the supplier who will be providing the goods or services **Department:** Shows the department the request originated from **Prepared For:** The individual that the requisition was prepared for **Prepared By:** The individual who prepared the requisition and submitted it for approval **Form Type:** Filter by the form that was used to create the requisition **State:** The current status of the document. Documents can be **assigned**, **unassigned**, or **placed on hold**. The hold feature is useful for separating documents that require follow up from new requests.	
6	Approvers can also sort their Approval screen by using the **Sort By** drop down menu	



Reviewing and Approving Requisitions

In this set of exercises, you will learn how to navigate through a requisition and find key information that will help you make your approval decision. Additionally, this section covers how Approvers can use comments to communicate with Requestors & Shoppers as well as how to approve, forward, return, and reject requisitions.

In this section of the course you learn to perform the following:

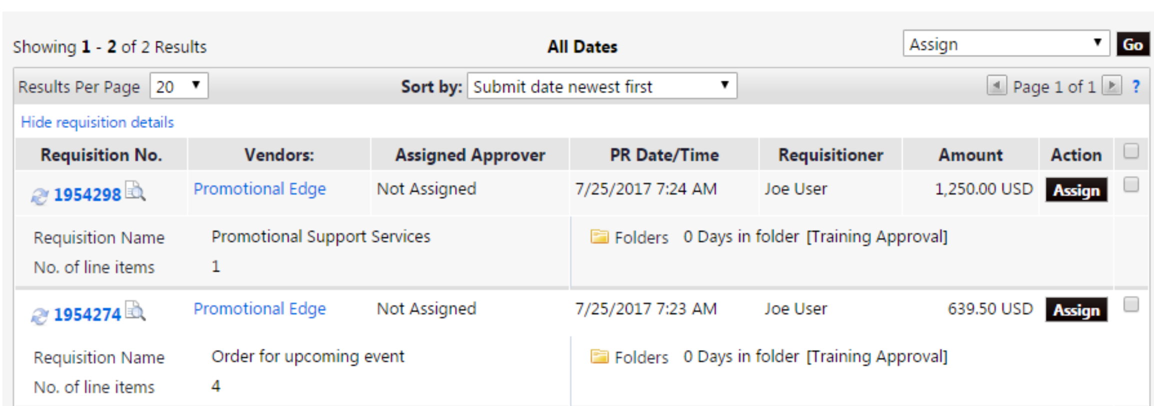
- Exercise 6: Navigate the Requisition
- Exercise 7: Using Comments
- Exercise 8: Approve
- Exercise 9: Forward
- Exercise 10: Return & Reject

Exercise 6: Navigating the Requisition

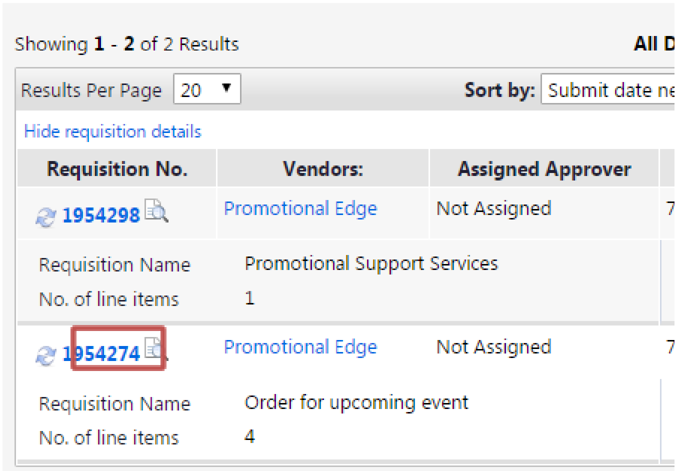
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Log into Hilltop Shop

Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on</td></tr>
<tr><td>2</td><td>From the home page, click on Documents from the left side navigation bar, click on Approvals, then click on My Approvals

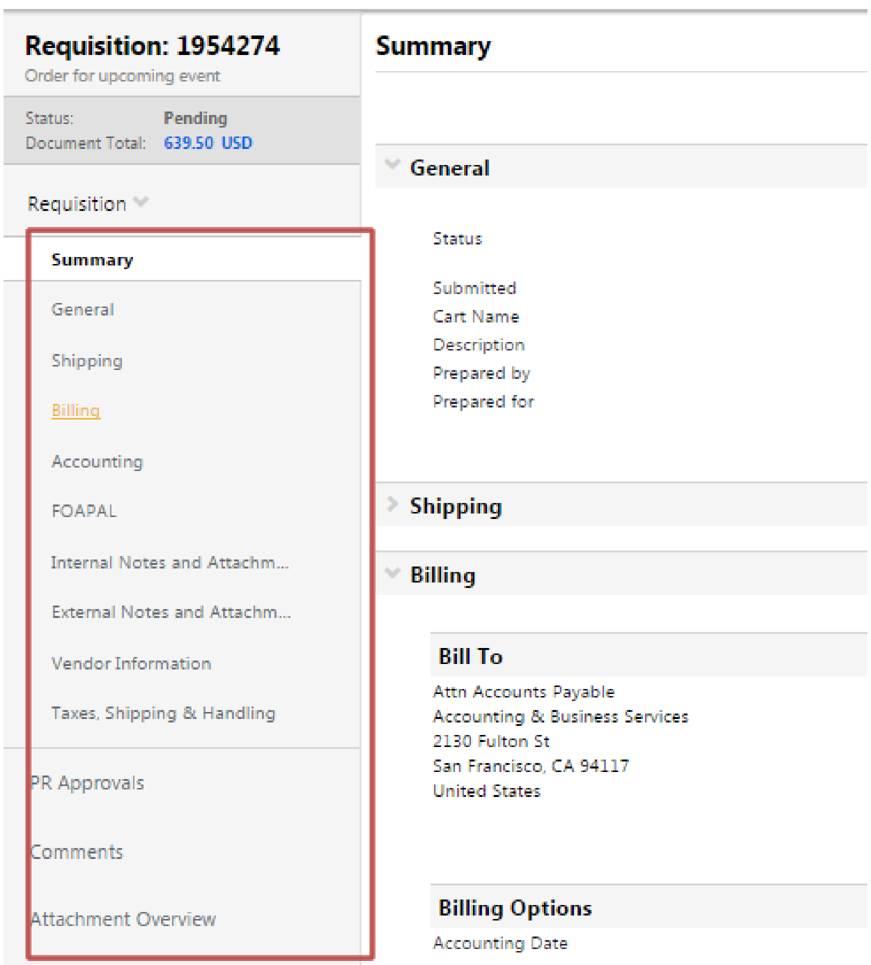
</td></tr>
<tr><td>3</td><td>You are now on the screen that shows the list of requisitions awaiting your approval



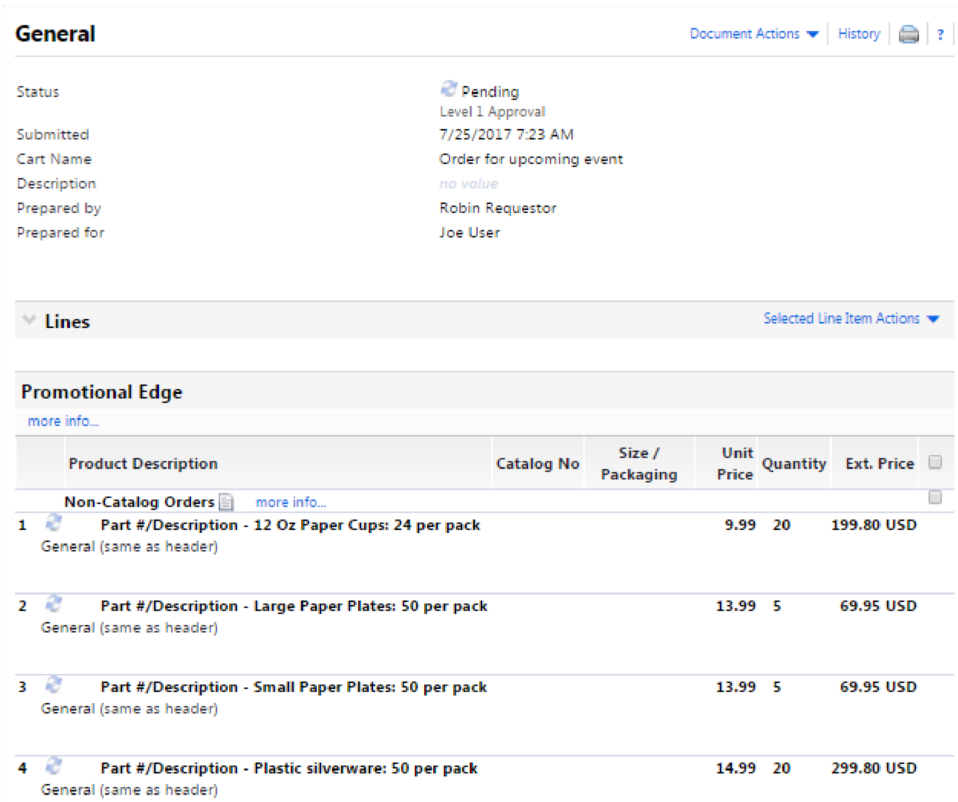
</td></tr>
<tr><td>4</td><td>Click on a requisitions number to view the details of the requisition.</td></tr>
</table>



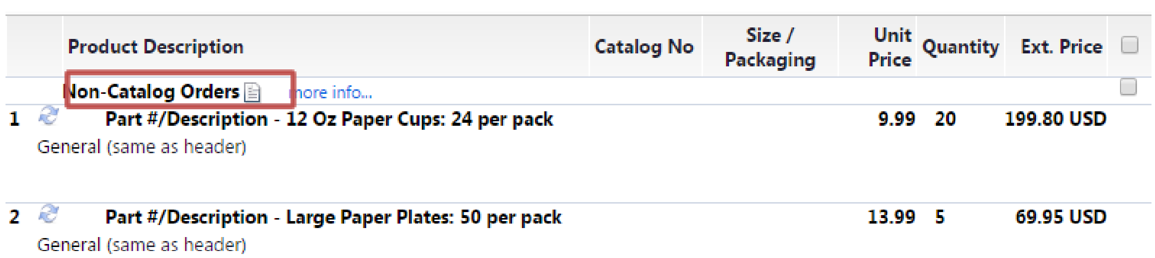
5 The requisition will open and you will be able to see all the details. Before approving a requisition, you should review all components including the line item, assigned FOAP, internal notes, and comments. All navigation takes place using the grey navigation pane on the left side of the screen.

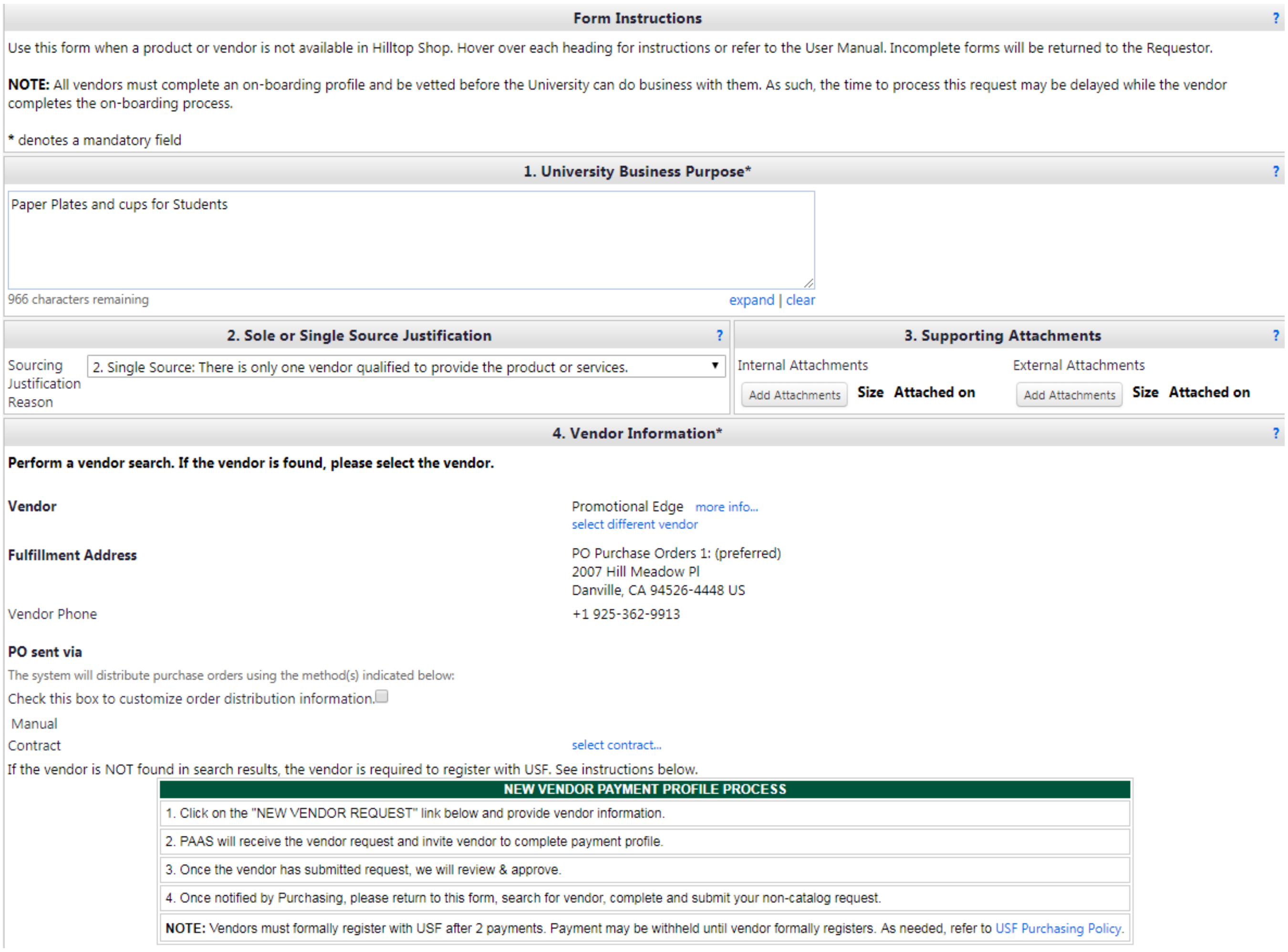


6	The **General** page shows high level of the requisition including: • Date the requisition was submitted for approval • Cart name • Name of the individuals who prepared and submitted the requisition • Line item details



7	If the requisition was created using a form, you will notice the name of the form appears above the first line item. You can click on the name of the form to view the details filled in on the form.





Form Instructions

Use this form when a product or vendor is not available in Hilltop Shop. Hover over each heading for instructions or refer to the User Manual. Incomplete forms will be returned to the Requestor.

NOTE: All vendors must complete an on-boarding profile and be vetted before the University can do business with them. As such, the time to process this request may be delayed while the vendor completes the on-boarding process.

* denotes a mandatory field

1. University Business Purpose*

Paper Plates and cups for Students

966 characters remaining — expand | clear

2. Sole or Single Source Justification

Sourcing Justification Reason: 2. Single Source: There is only one vendor qualified to provide the product or services.

3. Supporting Attachments

Internal Attachments — Add Attachments — **Size** **Attached on**

External Attachments — Add Attachments — **Size** **Attached on**

4. Vendor Information*

Perform a vendor search. If the vendor is found, please select the vendor.

Vendor — Promotional Edge more info... select different vendor

Fulfillment Address — PO Purchase Orders 1: (preferred)
2007 Hill Meadow Pl
Danville, CA 94526-4448 US

Vendor Phone — +1 925-362-9913

PO sent via

The system will distribute purchase orders using the method(s) indicated below:

Check this box to customize order distribution information.

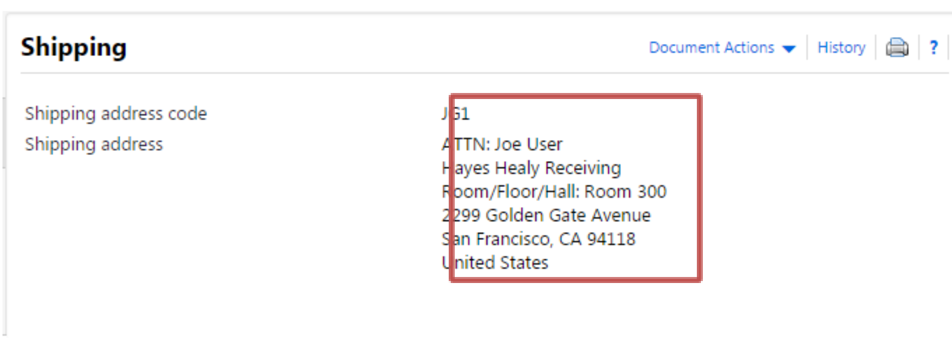
Manual

Contract — select contract...

If the vendor is NOT found in search results, the vendor is required to register with USF. See instructions below.

NEW VENDOR PAYMENT PROFILE PROCESS
1. Click on the "NEW VENDOR REQUEST" link below and provide vendor information.
2. PAAS will receive the vendor request and invite vendor to complete payment profile.
3. Once the vendor has submitted request, we will review & approve.
4. Once notified by Purchasing, please return to this form, search for vendor, complete and submit your non-catalog request.
NOTE: Vendors must formally register with USF after 2 payments. Payment may be withheld until vendor formally registers. As needed, refer to USF Purchasing Policy.

8 The **Shipping** page shows the attention to name and address where the Shopper and Requestor are requesting to have the order contents shipped.

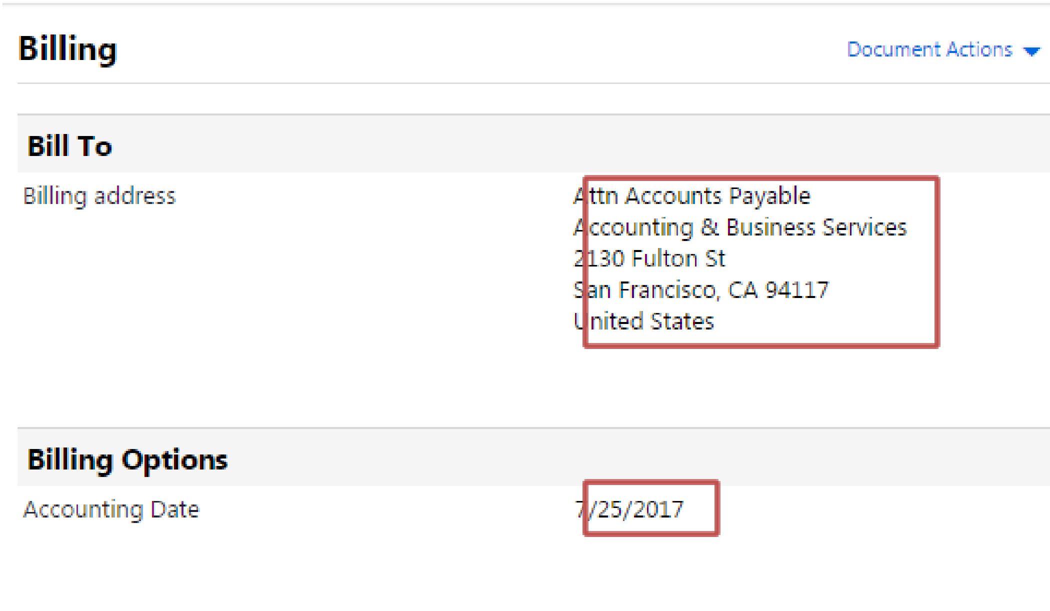
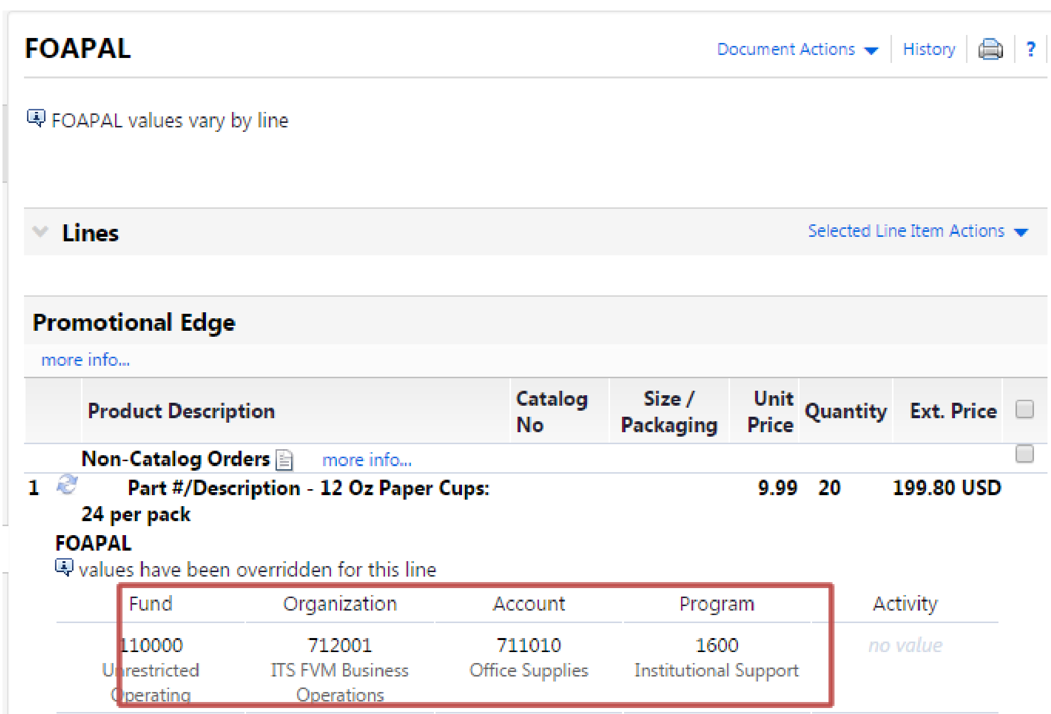


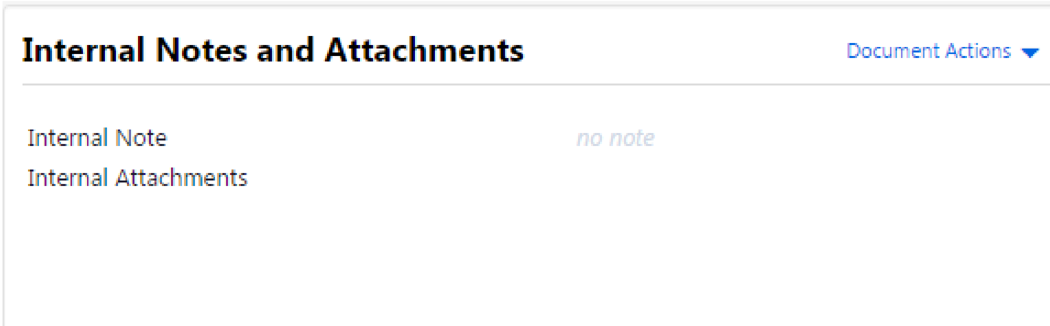
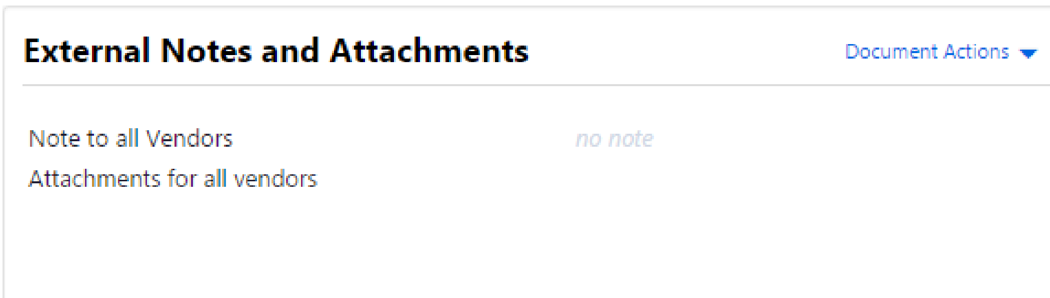
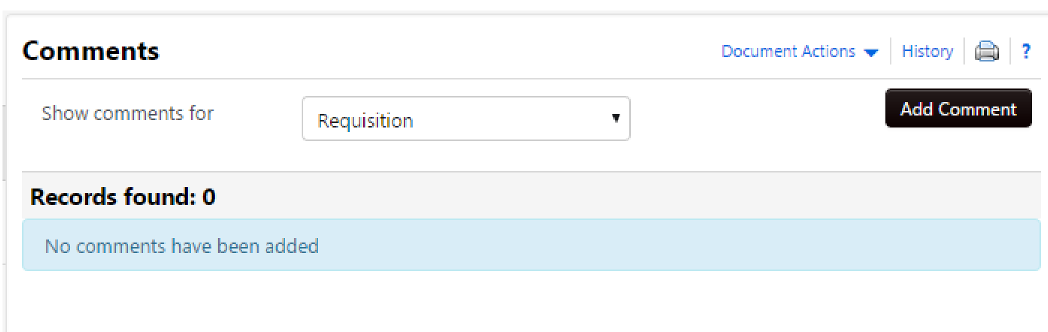
Shipping — Document Actions | History | ?

Shipping address code — JG1

Shipping address — ATTN: Joe User
Hayes Healy Receiving
Room/Floor/Hall: Room 300
2299 Golden Gate Avenue
San Francisco, CA 94118
United States

9 The **Billing** page shows the address for USF Accounts Payable. This should always show the central address for USF Accounts Payable. Additionally, this page also shows the accounting period the order will be placed against.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>10</td><td>The FOAPAL page shows the accounting string charged to each line item

</td></tr>
<tr><td>11</td><td>The Internal Notes and Attachments page shows any notes and/or attachments added to the requisition that will stay internal within the system</td></tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>12</td><td>The External Notes and Attachments page shows any notes and/or attachments added to the requisition that will be sent to the vendor on the purchase order

</td></tr>
<tr><td>13</td><td>The Comments page shows the comments thread for a given requisition
Note: the next exercise will show more details on how to utilize comments

</td></tr>
</table>

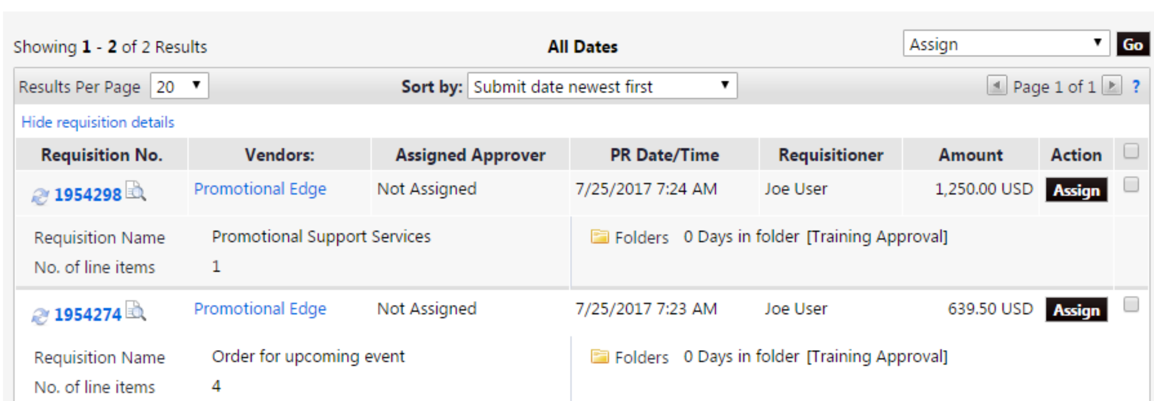
Exercise 7: Using Comments

Approvers can utilize Hilltop Shop to communicate directly with Shoppers and Requestors on a given requisition within the application by utilizing the comments feature. Comments allow for the ability to write and send a comment to a Shopper, Requestor, and/or any other individual within the USF community. Additionally, responses to your comments can be returned directly within the application as well and all comment threads are saved and viewable across all related documents such as POs and Invoices.

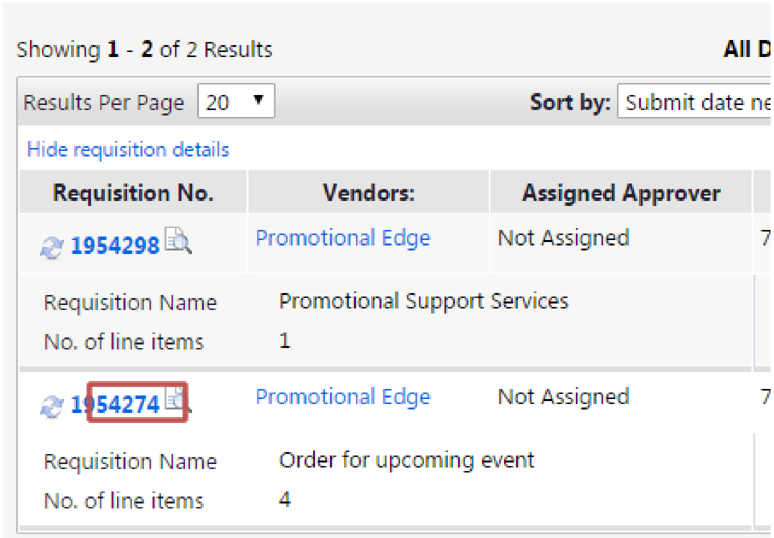
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Log into Hilltop Shop

Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on</td></tr>
<tr><td>2</td><td>From the home page, click on Documents from the left side navigation bar, click on Approvals, then click on My Approvals

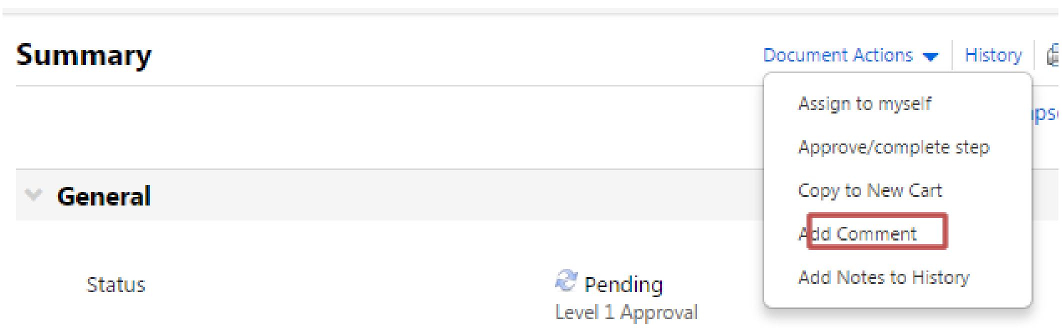
</td></tr>
<tr><td>3</td><td>You are now on the screen that shows the list of requisitions awaiting your approval.



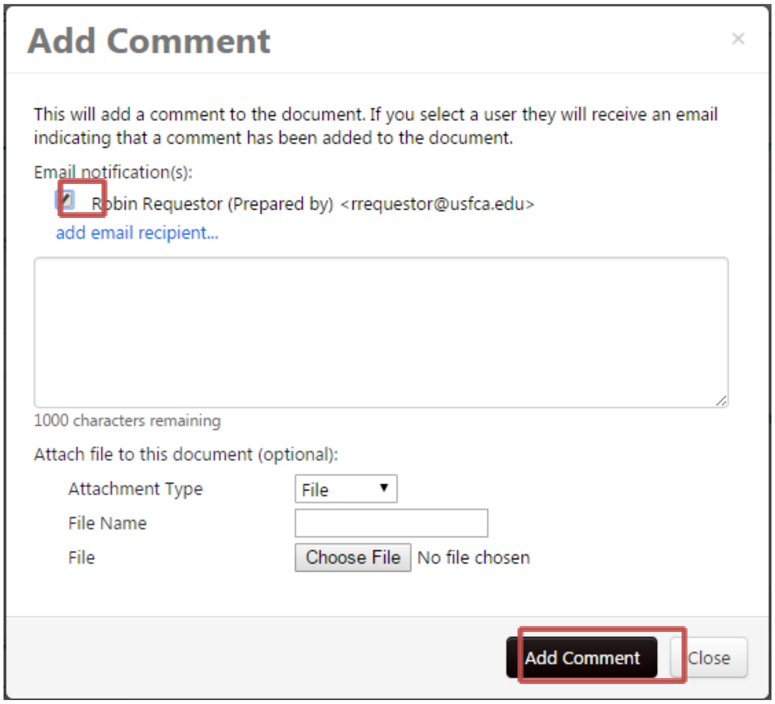
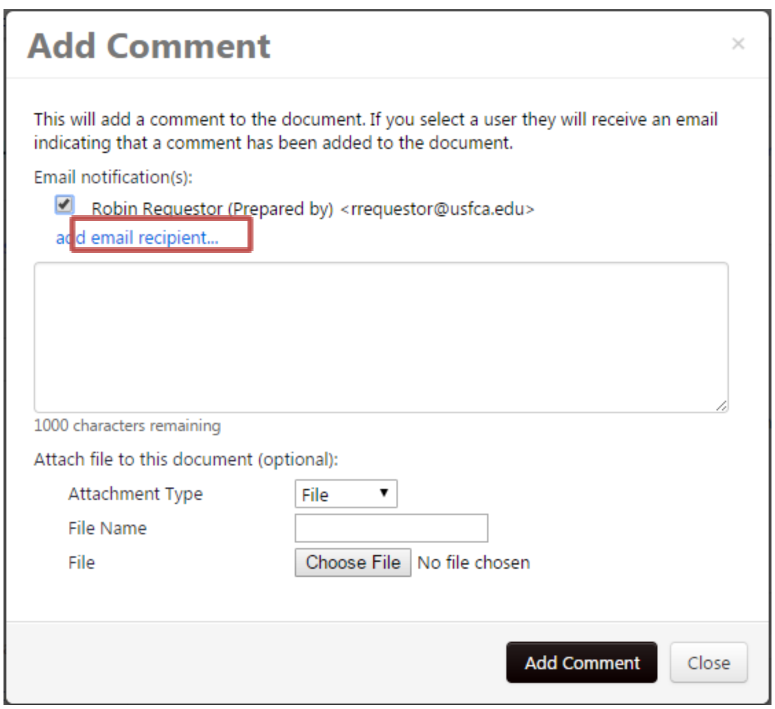
</td></tr>
<tr><td>4</td><td>Click on a requisitions number to view the details of the requisition.</td></tr>
</table>

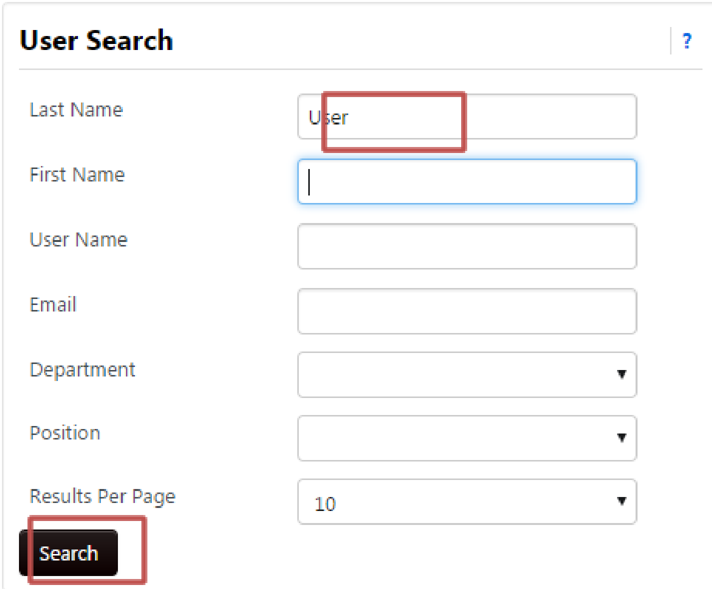
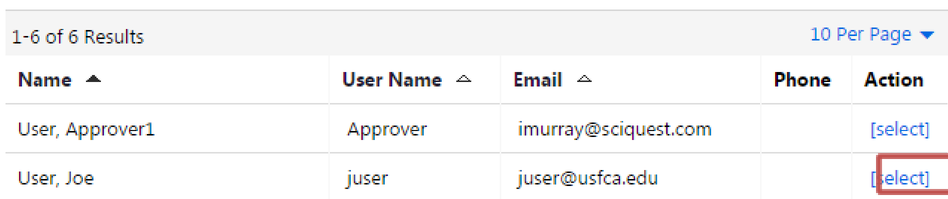
<table>
<tr><td></td><td>


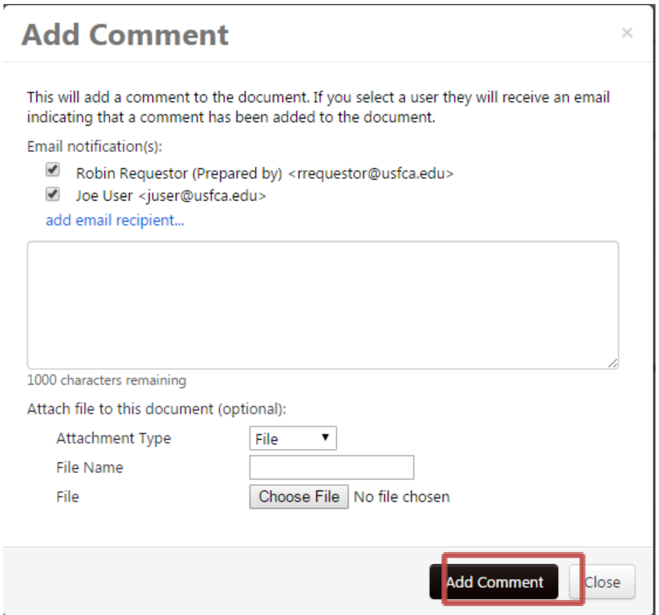
</td></tr>
<tr><td>5</td><td>Click on Document Actions towards the top right of the screen, then click on Add Comment.



</td></tr>
<tr><td>6</td><td>The following box will appear, ensure that you have selected the checkbox next to the requester’s name.
Insert your comment in the provided box, you will have up to 1000 characters.
Click Add Comment.</td></tr>
</table>

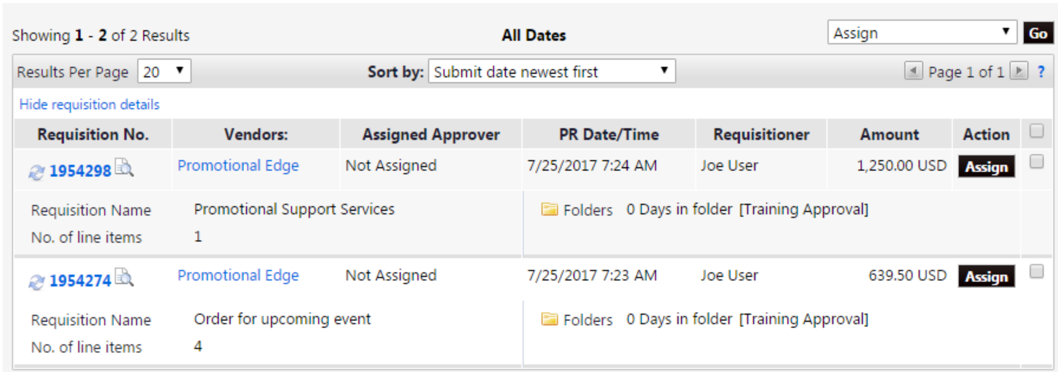
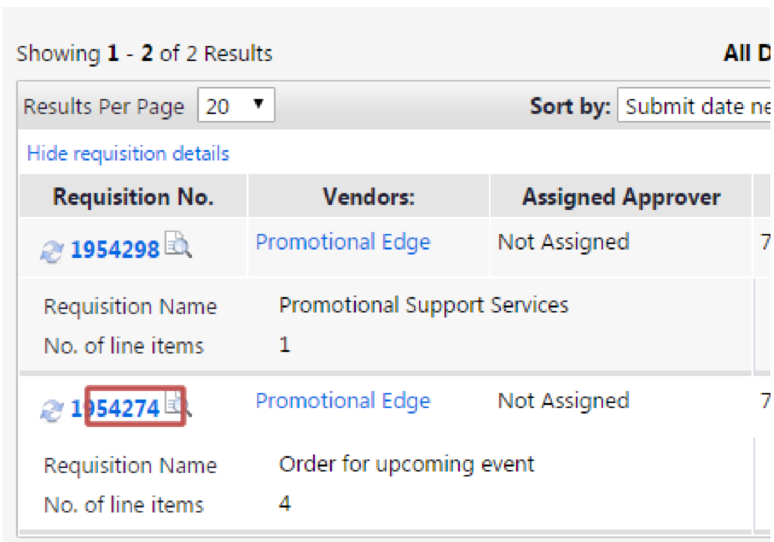
<table>
<tr><td></td><td>
</td></tr>
<tr><td>7</td><td>If you'd like to share the comment with other colleagues, click Add Email Recipient.

</td></tr>
<tr><td>8</td><td>Search for your colleagues by Last Name and click Search.</td></tr>
</table>

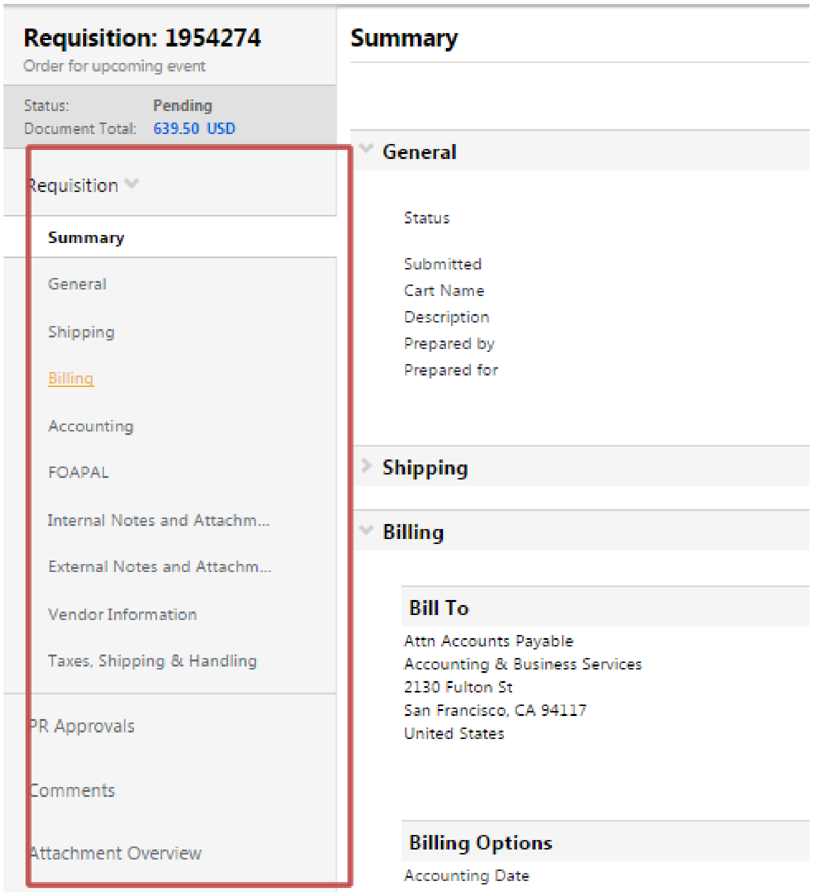
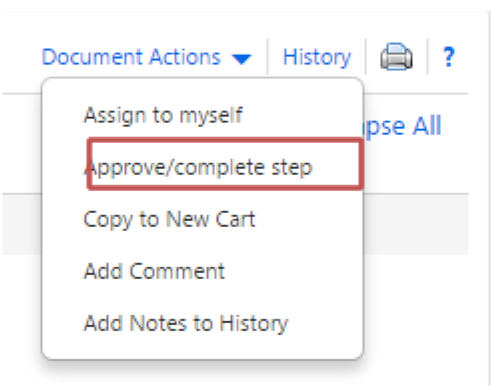
	
9	All colleagues with the Last Name will appear. Click **Select** to add the colleagues to your notifications. 
10	Once your colleague has been selected, they will appear under the requester's name. Ensure that you have selected the checkbox next to all names. Insert your comment in the provided box. Click **Add Comment.**

Exercise 8: Approve a Requisition

Step	Description
1	Log into Hilltop Shop Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on
2	From the home page, click on **Documents** from the left side navigation bar, click on **Approvals,** then click on **My Approvals** 
3	You are now on the screen that shows the list of requisitions awaiting your approval

	
4	Click on a requisitions number to view the details of the requisition. 
5	Before approving a requisition, you should review all components of the requisition to make sure you truly want to approve it. See exercise 6 on how to navigate the requisition.

	
6	After you have conducted a sufficient review of the requisition, you can approve the requisition by selecting **Approve/Complete Step**, under the **Document Actions** drop down menu. 

Exercise 9: Forward a Requisition

Occasionally, an Approver may receive a requisition to approve but decide you would like to have another Approver review the particular requisition and approve on your behalf. This exercise will show you how you can forward a single requisition to another to review.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Log into Hilltop Shop

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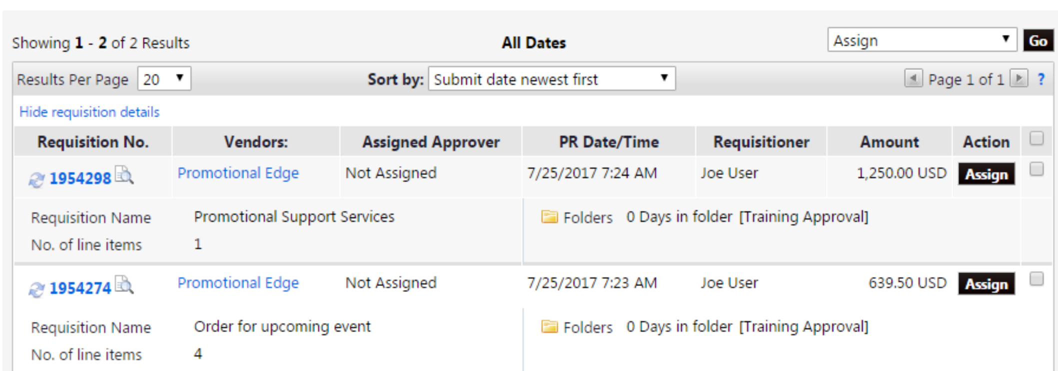
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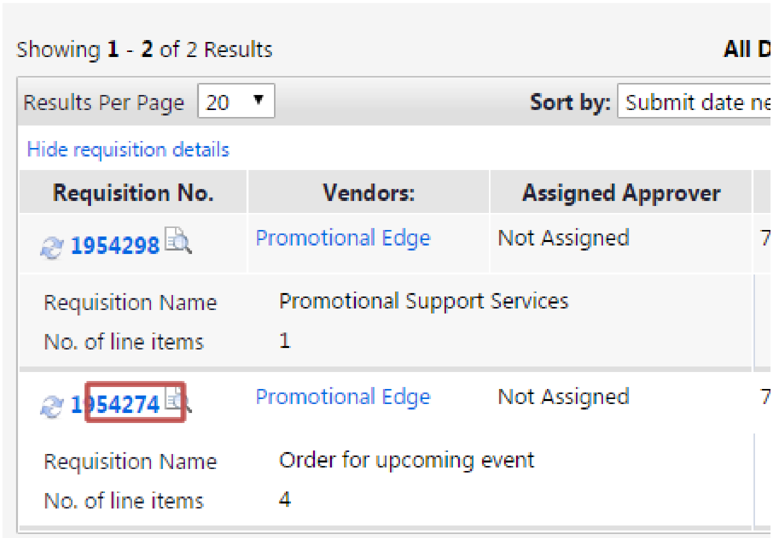
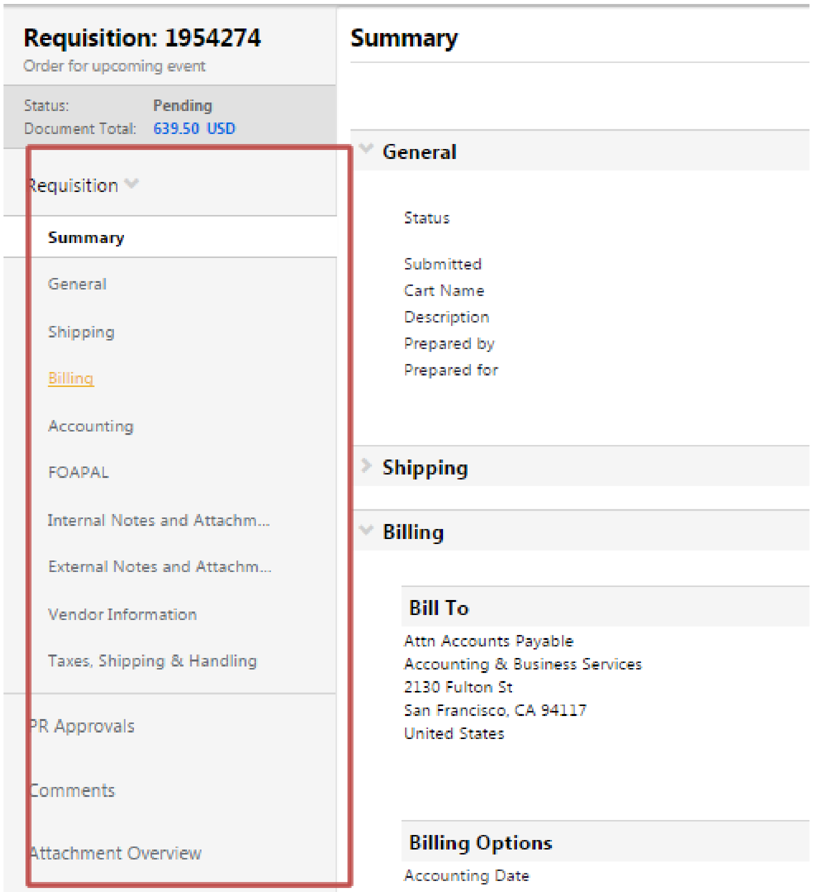
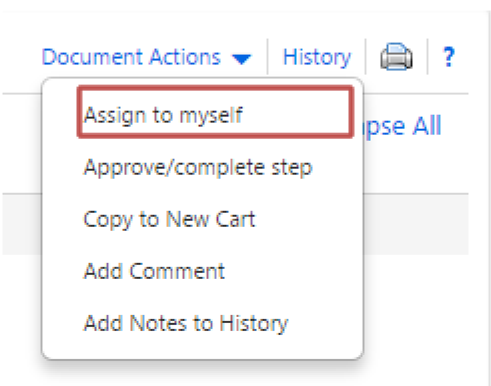
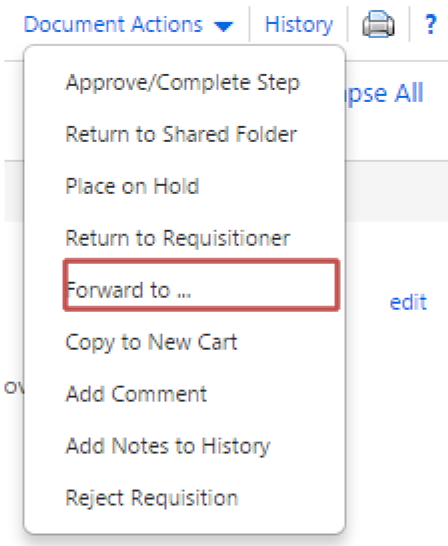
</table>

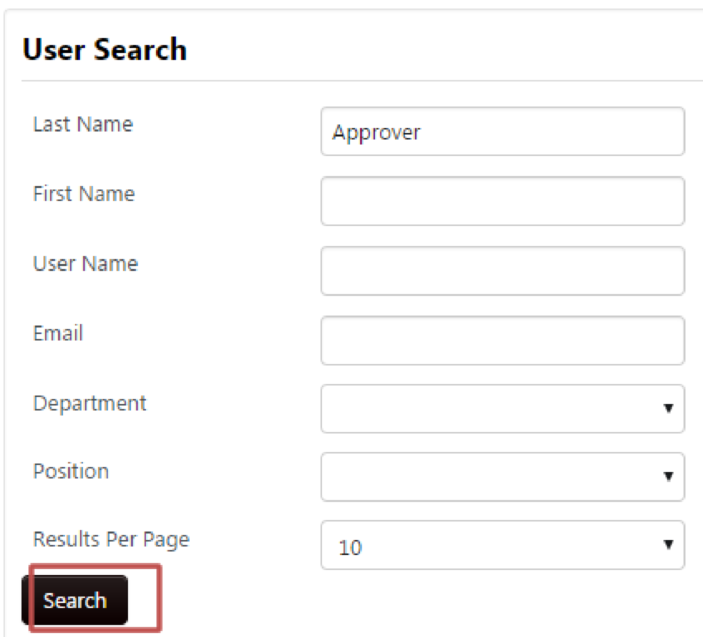
<table>
<tr><td></td><td>
</td></tr>
<tr><td>5</td><td>Before forwarding a requisition, you should review all components of the requisition to make sure you truly want to forward it to another approver.

See exercise 6 on how to navigate the requisition.</td></tr>
</table>

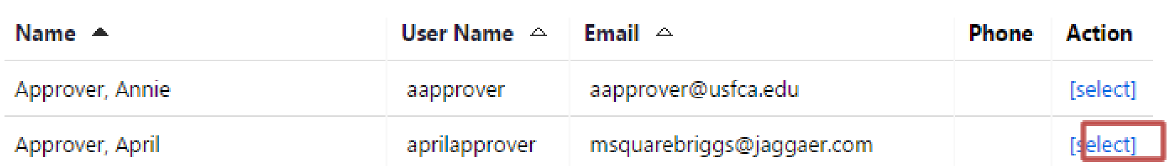
<table>
<tr><td></td><td>
</td></tr>
<tr><td>6</td><td>After you have conducted a sufficient review of the requisition, you can forward the requisition by selecting Assign to myself, under the Document Actions drop down menu.

</td></tr>
<tr><td>7</td><td>Click on the Document Actions drop down again and then click on Forward to ⋯ option.</td></tr>
</table>



8 Enter the **Last Name** of the Approver who you would like to forward the requisition, then press the **Search** button.

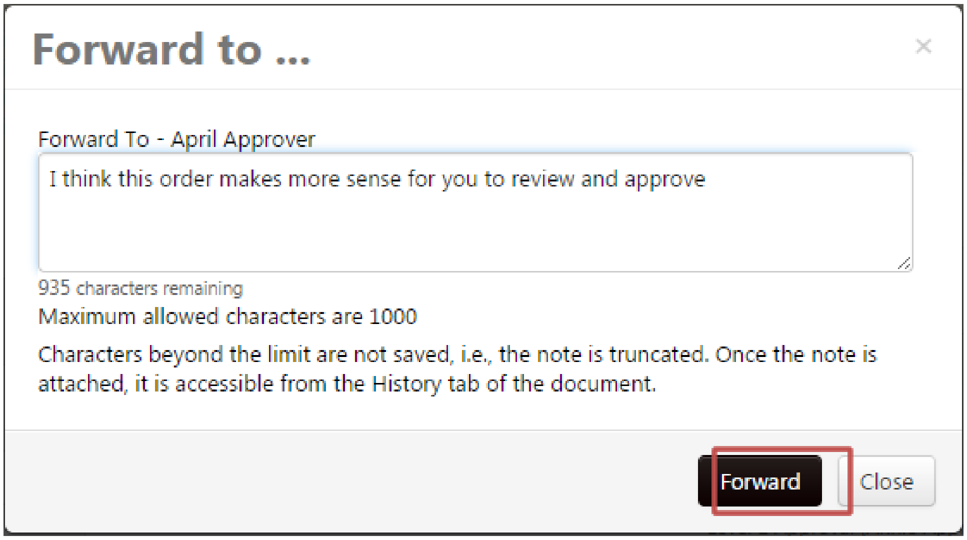


9 Press **Select** next to the name of the Approver you would like to forward the requisition to



Name	User Name	Email	Phone	Action
Approver, Annie	aapprover	aapprover@usfca.edu		[select]
Approver, April	aprilapprover	msquarebriggs@jaggaer.com		[select]

10 Enter a comment to the new approver, then click the **Forward** button

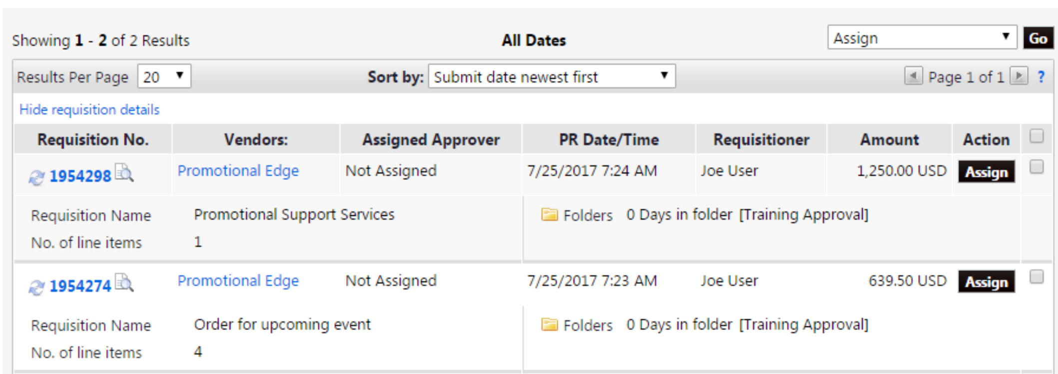


Exercise 10: Return or Reject a Requisition

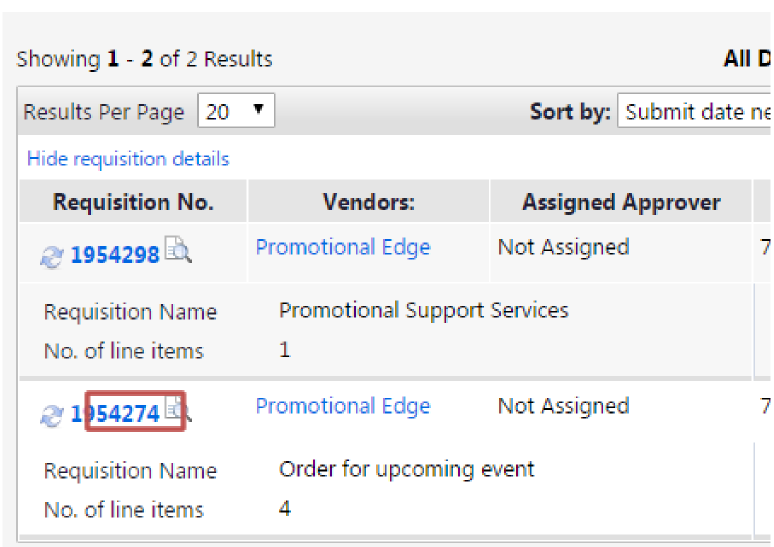
In addition to being able to approve a requisition, Approvers have the ability to Return a requisition to the Requestor or Reject the requisition. Returning a requisition will allow the Requestor to make modifications and resubmit the requisition. Rejecting a requisition will not allow the Requestor to modify and resubmit the original requisition. As a best practice, Approvers should typically return requisitions and only utilize reject when you prefer the order not be resubmitted.

Step	Description
1	Log into Hilltop Shop Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on
2	From the home page, click on **Documents** from the left side navigation bar, click on **Approvals,** then click on **My Approvals**

3 You are now on the screen that shows the list of requisitions awaiting your approval



4 Click on a requisitions number to view the details of the requisition.

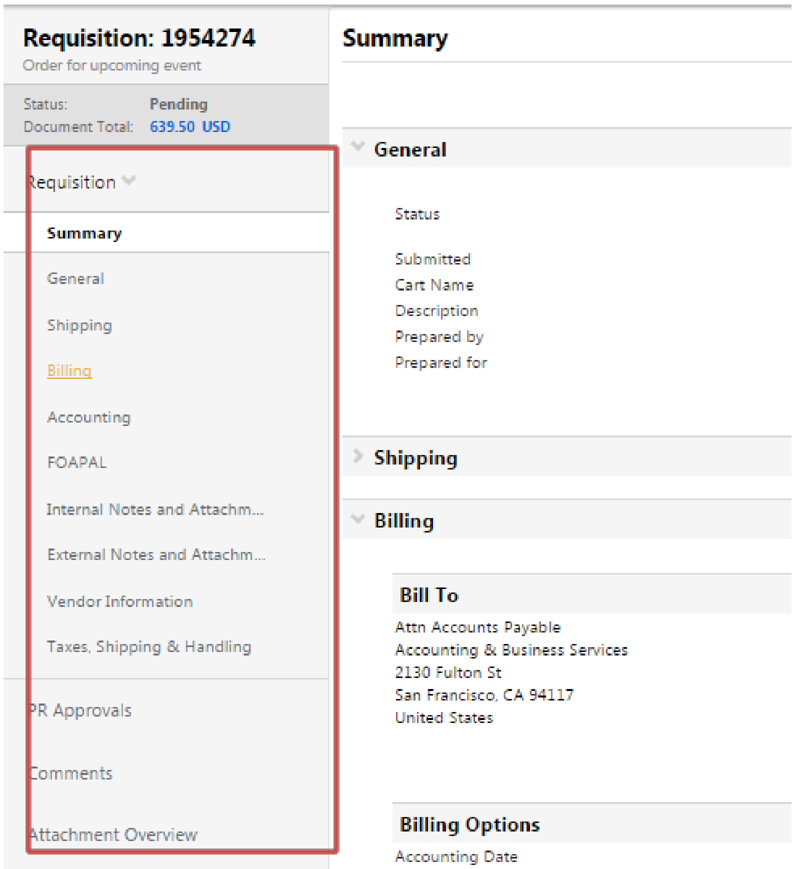


UNIVERSITY OF SAN FRANCISCO

5

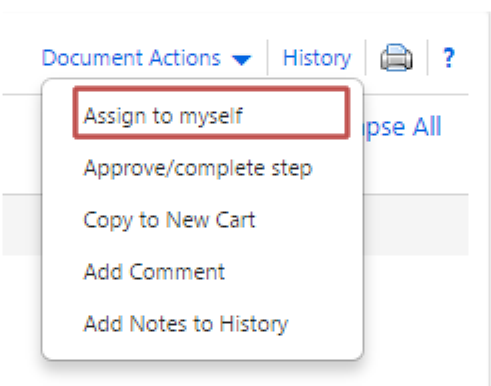
Before returning or rejecting a requisition, you should review all components of the requisition to make sure you truly want to return/reject it to the Requestor.

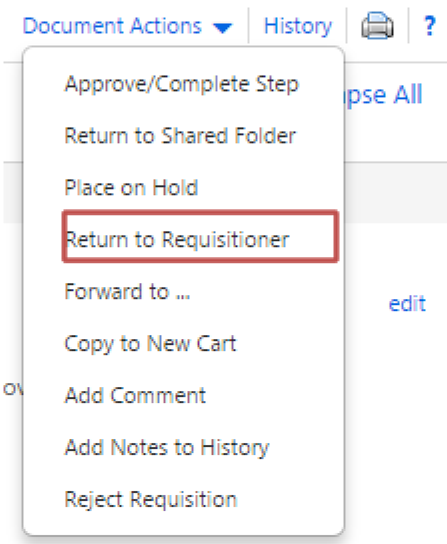
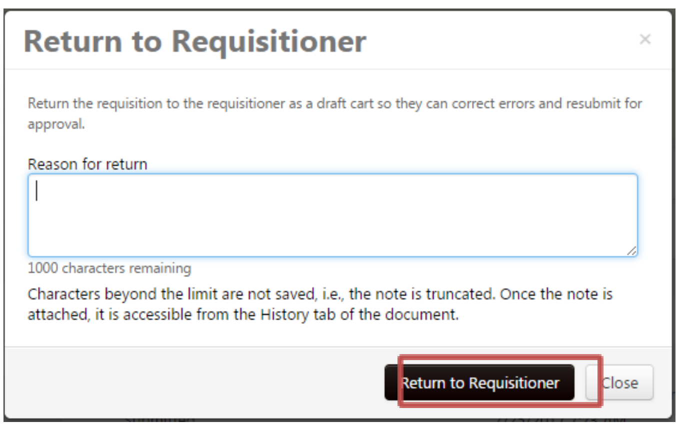
See exercise 6 on how to navigate the requisition.

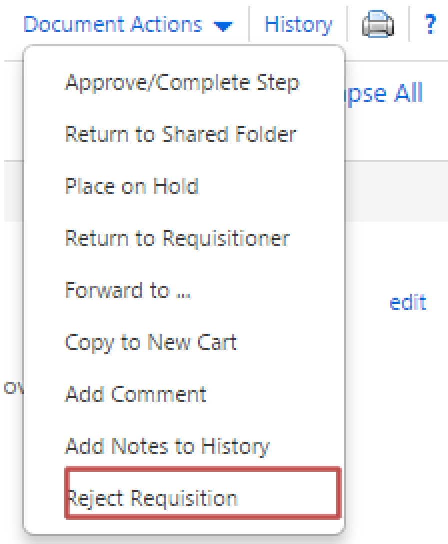
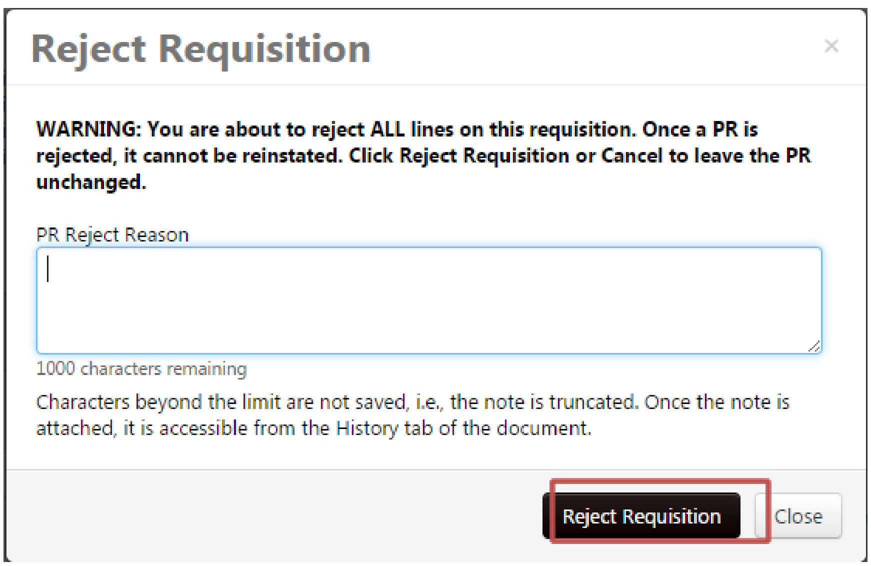


6

After you have conducted a sufficient review of the requisition, you can forward the requisition by selecting **Assign to myself**, under the **Document Actions** drop down menu.



<table>
<tr><td>7</td><td>To Return the requisition, click on the Document Actions drop down again and then click on Return to Requisitioner option.

</td></tr>
<tr><td>8</td><td>Enter a reason for returning the requisition then click on the Return to Requisitioner button

</td></tr>
<tr><td>9</td><td>To Reject the requisition, click on the Document Actions drop down again and then click on Reject Requisition option.</td></tr>
</table>

<table>
<tr>
<td></td>
<td>
</td>
</tr>
<tr>
<td>10</td>
<td>Enter a reason for rejecting the requisition then click on the Reject Requisition button.

</td>
</tr>
</table>

Setting Substitute Approvers

Approvers also have the ability, within Hilltop Shop, to substitute (delegate) their approval temporarily to another approver. This is most useful for an Approver to utilize when he/she will be out of the office or will be unable to review requisitions for a period of time.

Approvers should keep the following concepts in mind when substituting his/her approval:

- Substitutions should only be setup for a defined start and end date
- Approvers can only substitute to other USF employees who have an Approver role

In this section of the course you learn to perform the following:

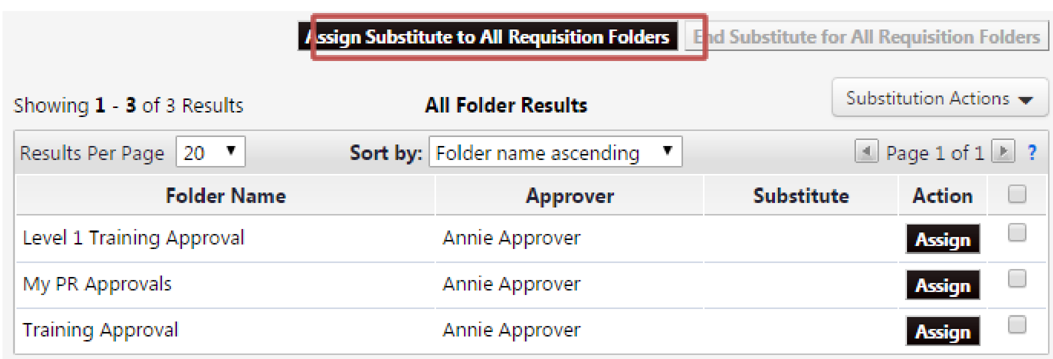
- Exercise 11: Set a Substitute Approver for all Approval Folders
- Exercise 12: Set a Substitute Approver for Select Approval Folders
- Exercise 13: Remove a Substitute Approver

Exercise 11: Set a Substitute Approver for All Approval Folders

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Log into Hilltop Shop

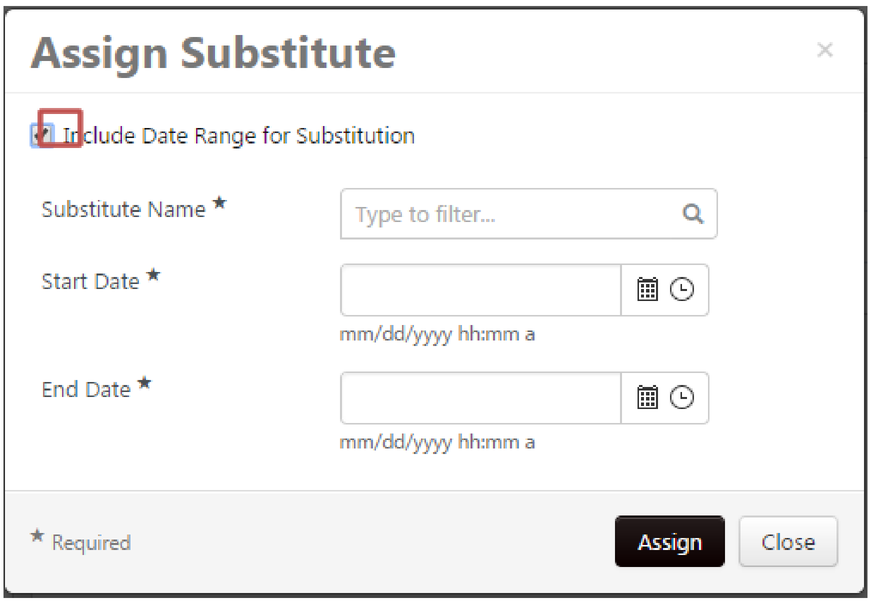
Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on</td></tr>
<tr><td>2</td><td>From the home page, click on Documents from the left side navigation bar, click on Approvals, then click on Assign Substitute Approvers.


</td></tr>
<tr><td>3</td><td>This screen shows the various folders (approval queues) where you are setup as an approver.

You can assign a substitute approver for all approval folders by clicking on the Assign Substitute to All Requisition Folders button towards the top of the page.


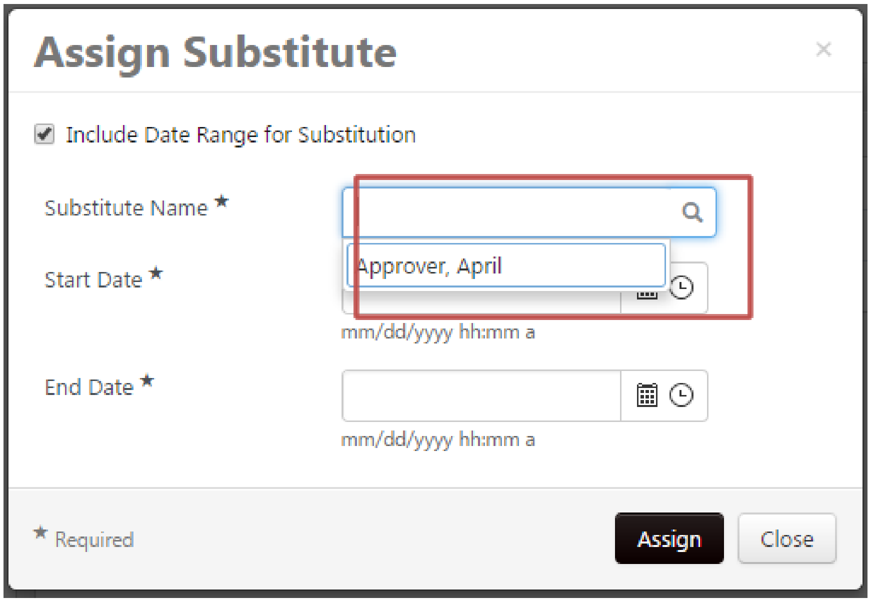
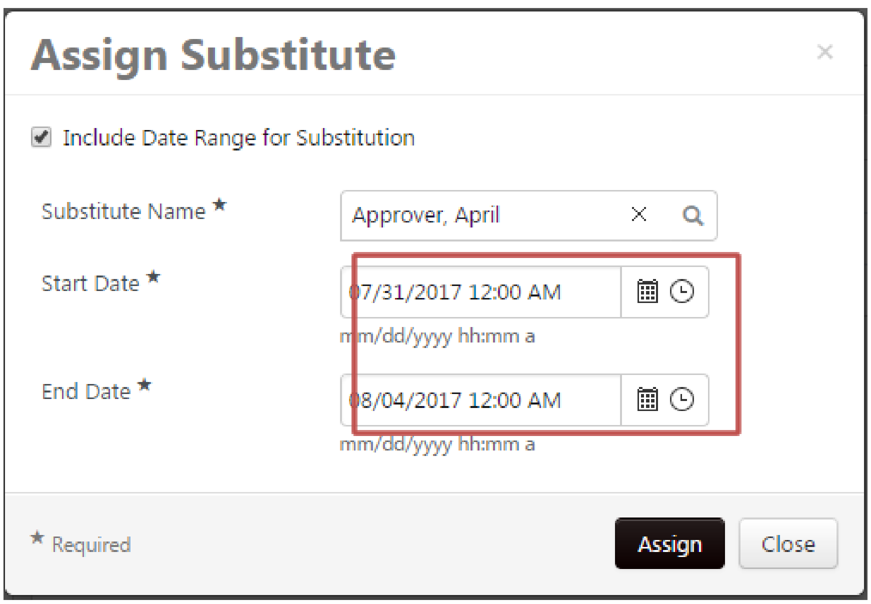
</td></tr>
<tr><td>4</td><td>A pop-up window will open which will allow you to assign your substitute approver as well as the date range you would like the substitution to apply.</td></tr>
</table>

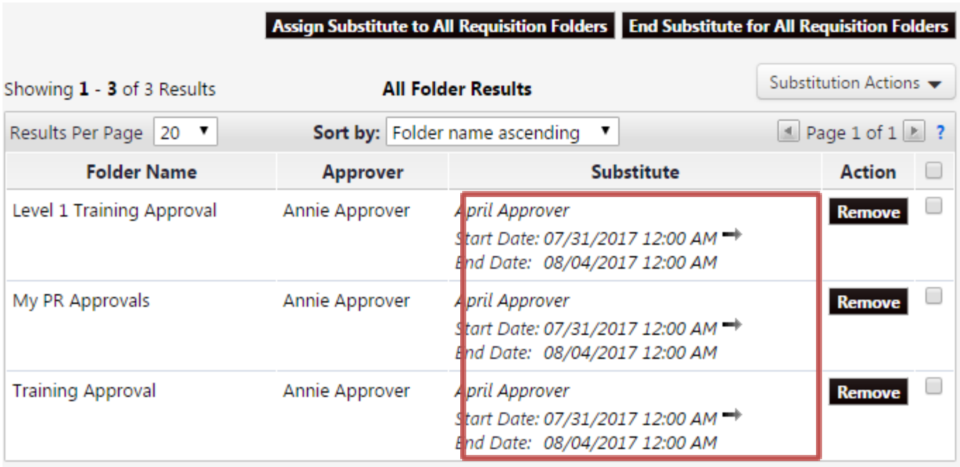
5 Place a check mark next to the **Include Date Range for Substitution** option to show the start and end date options.



6 In the **Substitute Name** field start type the name of the approver you would like to delegate as your substitute., then select the appropriate individual.

Note: You can only delegate your approval to another employee who has an Approver role in Hilltop Shop.

	
7	Set the **Start Date** and **End Date** for the date range where you would like to delegate your approval. Click on the **Assign** button. 
8	Once your substitution is completed, you will see the **Substitute** is now populated with the name of the **Substitute** and the **Date Range**. You will also have the option to **Remove** the substitute at any time.


Assign Substitute to All Requisition Folders
End Substitute for All Requisition Folders
Showing 1 - 3 of 3 Results
All Folder Results
Substitution Actions
Results Per Page 20
Sort by: Folder name ascending
Page 1 of 1
Folder Name
Approver
Substitute
Action
Level 1 Training Approval
Annie Approver
April Approver
Start Date: 07/31/2017 12:00 AM
End Date: 08/04/2017 12:00 AM
Remove
My PR Approvals
Annie Approver
April Approver
Start Date: 07/31/2017 12:00 AM
End Date: 08/04/2017 12:00 AM
Remove
Training Approval
Annie Approver
April Approver
Start Date: 07/31/2017 12:00 AM
End Date: 08/04/2017 12:00 AM
Remove

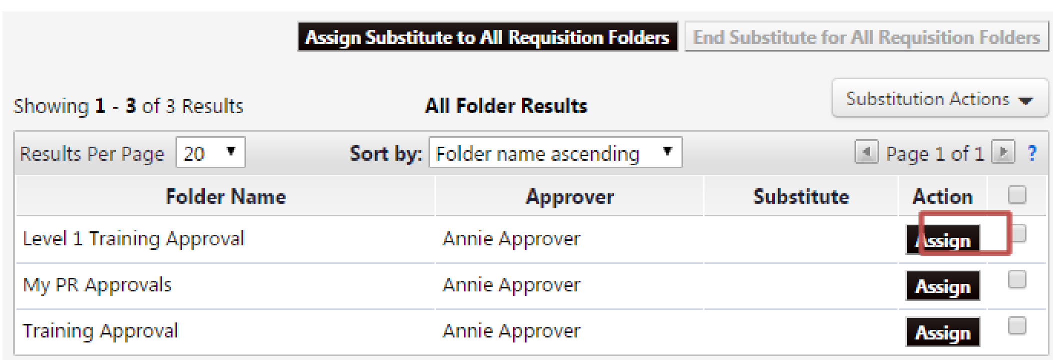
Exercise 12: Set a Substitute Approver for Select Approval Folders

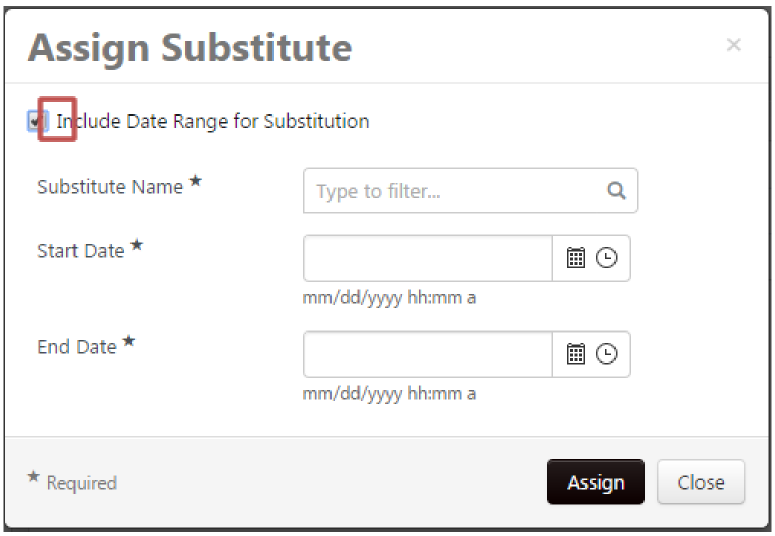
There may be some instances where you would like to assign a substitute for only a select approval folder (approval queue) or set separate substitute approvers per approval folder. The exercise below will show how to set substitute approvers for only select folders.

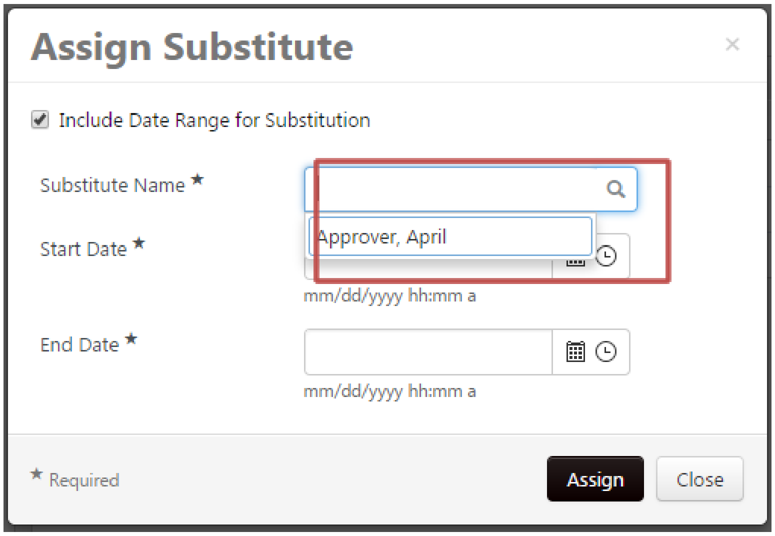
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Log into Hilltop Shop

Use the username provided to you. In production, there will not be required to enter separate login credentials as all users will access the site through USF's Single Sign-on</td></tr>
<tr><td>2</td><td>From the home page, click on Documents from the left side navigation bar, click on Approvals, then click on Assign Substitute Approvers.

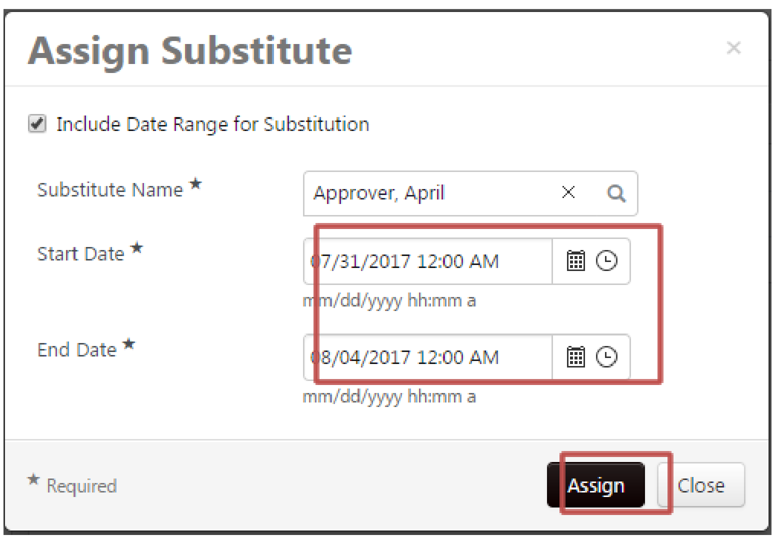
</td></tr>
<tr><td>3</td><td>This screen shows the various folders (approval queues) where you are setup as an approver.

Locate the applicable folder where you would like to set a substitute and click the Assign button to the right side of the page

</td></tr>
<tr><td>4</td><td>A pop-up window will open which will allow you to assign your substitute approver as well as the date range you would like the substitution to apply.</td></tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>5</td><td>Place a checkmark next to the Include Date Range for Substitution option to show the start and end date options.

</td></tr>
<tr><td>6</td><td>In the Substitute Name field start type the name of the approver you would like to delegate as your substitute., then select the appropriate individual.
Note: You can only delegate your approval to another employee who has an Approver role in Hilltop Shop.</td></tr>
</table>



7 Set the **Start Date** and **End Date** for the date range where you would like to delegate your approval, click on the **Assign** button.



8 Once your substitution is completed, you will see the **Substitute** is now populated with the name of the **Substitute** and the **Date Range**.

You will also have the option to **Remove** the substitute at any time.


Assign Substitute to All Requisition Folders
End Substitute for All Requisition Folders
Showing 1 - 3 of 3 Results
All Folder Results
Substitution Actions
Results Per Page 20
Sort by: Folder name ascending
Page 1 of 1
Folder Name
Approver
Substitute
Action
Level 1 Training Approval
Annie Approver
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Remove
My PR Approvals
Annie Approver
Assign
Training Approval
Annie Approver
Assign

About Training and Support

Training Resources

Additional training resources including course guides, quick reference guides, and videos are available at the USF Hilltop Shop Support Page.

Support

Additional support can be requested through eprocurement@usfca.edu