



FOUNDATION YOOZ APPROVER INSTRUCTIONS

- 1. Overview of Yooz** - Yooz is an advanced accounts payable automation system designed to enhance efficiency and accuracy in processing payment requests (reimbursement requests) from the University, significantly streamlining workflows for the University and Foundation. The system captures transaction data, including gift index codes, supporting documentation, and approvals. It also retains historical payment requests for future user reference.
- 2. Foundation Payment Request Policy** - The policy governing Foundation payment requests can be found here: <https://supportum.org/aboutus/campus-administrative-forms>
- 3.** There are several training videos available for Yooz that are a good companion to these instructions. Please email accountspayable@supportum.org for links to the most updated versions of the videos.
- 4. Accessing the Yooz system**

 - A. Open your internet browser and go to: <https://us1.getyooz.com/#/>
 - B. Use your @mso.umt.edu email alias to log in, even if it is not your regularly used email address.
- 5. Navigating Yooz**

 - A. Upon logging in, you will be directed to the “My tasks” page, where you can:
 - a. **View and approve purchase requests** – Purchase requests needing your approval will show on the “My Tasks” page when you login to Yooz
 - b. **Access blocked requests** – Blocked requests can be reviewed by clicking on the “Blocked” button that is near the top of the “My Tasks” page

The “block” request function should not be used as we risk purchase requests being put on hold indefinitely in error. Requests blocked in error should be “unblocked.”

 - c. **Access the search function** – The search function can be accessed from many of the screens within Yooz by clicking on the magnifying glass that is

near the top right of the screen. Additional details on using the search function are provided later in these instructions.

6. **Approving a Payment Request in Yooz** – Payment requests within Yooz will utilize the system's "Purchase request" tool. The designated requisitioner(s) for your fund(s) will initiate the purchase request within Yooz and then select an approver to approve the purchase request. You will receive an email from Yooz alerting you to any purchase requests that need your approval. The emails batch the requests every four hours to reduce the volume of emails you receive.

A. Approval Steps:

- a. From the "My tasks" page, select a purchase request
 1. **Review the request to ensure it's aligned with the fund's purpose** (you can expand the fund purpose box to view the full description).
 2. **Check attachments** to ensure the supporting documents match the amounts and descriptions in the request.
 3. **Verify the form fields** are properly completed.
- b. Once reviewed, you have two options:
 1. **Approve:** Click the "Approve" button. This will send the request to the Foundation for payment.
 2. **Send Back:** Click the "Send back" button if corrections are needed. If you "Send back" a request you must email the person you send it back to in order to alert them of the "Send back." The system does not automatically generate an email when sending back.

7. **Accessing Past Purchase Requests**

- A. Search Function** - All purchase requests in Yooz can be found using the search function. To access the search function, click the small magnifying glass located in the upper-right corner of the "My tasks" page and then hit the large search button on the right side of the screen. You can add in an amount or text into the search field prior to hitting search to filter the results. The system will search all fields except the comment field.

Once the search results appear, you can either open a purchase request by clicking on the respective line or download the results as an Excel spreadsheet by clicking the "Download" button on the right side of the screen.

8. The default Yooz columns are not meaningful for how we have adapted Yooz. There is a video that gives step-by-step instructions on how to set up your columns. To

customize the displayed columns please watch the video to ensure you hit the correct buttons as needed in the setup.

A. The table on the following page shows the columns you will want to have selected on each screen.

Column Selection	My tasks/ To do	Search	Description
Yooz number	X	X	Users can cross reference this number to the document number in the Foundation's accounting records
Alert	X	X	Will show "Rejected" if a purchase request has been sent back for correction
Task	X	X	Create: this is the step where a purchase request is created, Approve: the request is waiting to be approved by the fund approver, A/P Review: The request has been approved by the department and has been sent to the Foundation, if blank: the request has completed the workflow, see the column named "Date (Other purchase data)" to see payment date to University
Recipients		X	Name of person that currently has the purchase request in their to-do list
Document creation date	X	X	
Created by	X	X	
Last comment	X	X	
Date (Other purchase data)		X	The date the payment was made to the University, will also match the date in the Foundation's accounting records
Gift index code (Other purchase data)	X	X	
Activity code (Other purchase data)	X	X	
Fund number and name (Other purchase data)	X	X	
Project code (if any) (Other purchase data)	X	X	

9. Definitions

- A. **University** - The University of Montana ("University")
- B. **Foundation** - The University of Montana Foundation ("Foundation")
- C. **Payment request** - A request from the University for a payment to be made, which is put onto a purchase request form in Yooz
- D. **Requisitioner** – The person who creates the purchase request within Yooz.
- E. **Approver** – A person authorized to approve the purchase. This may be the fund's responsible party or their designee.