

You may check the location and status of a requisition in UShop by looking at the electronic workflow.

I. PR Approvals tab

Click on the PR Approvals tab found on the left side of the Requisition page. (PR stands for Purchase Requisition.)

II. Requisition workflow

A. View Future Workflow

The image below is of an order before the requisition is submitted, so it shows the workflow that will occur.

1. CF Validation and CF Validation Response represent automated communication between UShop and PeopleSoft to assure that the accounting distribution used is active and valid.
2. Department Approval. For this step a message is sent to the person with Grant Financial Authority (GFA) on the ORG ID specified as the Acct Dist Shortcut. Department Approval must be obtained up front in UShop, before the order is placed. Click on the view approvers link to see the individual(s) with GFA who can approve this order. Note that each ORG ID listed will require an approval.
3. Final CF Validation and Final CF Validation Response represent a final communication between UShop and PeopleSoft.
4. Then the system creates the PO and the Requisition Workflow is complete.

Workflow Step Approvers (Department Approval)

Approver Group : Acct Dist Shortcut: 02-91029 (UUH IPC 23A NBICU): (All Values)
 CAROL J TIPPS HENDERSON carol.henderson@hsc.utah.edu +1 801-581-2979

Approver Group : Acct Dist Shortcut: 02-91499 (UUH ENT 33A MINERS HOSP): (All Values)
 NANCY CHRISTENSEN-MAYER nancy.mayer@hsc.utah.edu +1 801-581-2337

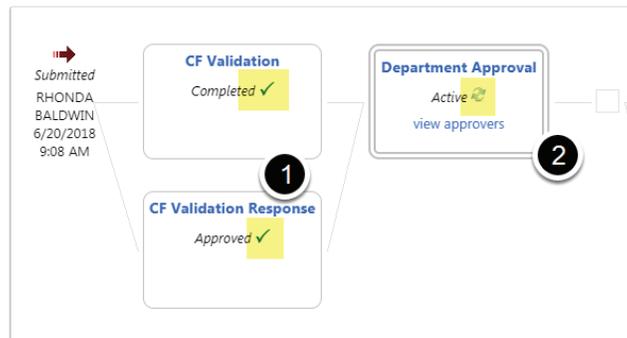
B. Submit Requisition

When you have completed all that needs to be done to prepare your requisition, click on the button in the upper right hand corner of the screen, Submit Requisition. This will send your order into Requisition workflow.

The screenshot shows a requisition form for 'Requisition: 98548072' with the title 'Room Reservations for February Meeting'. A green banner at the top contains a warning icon and text: 'The A/U is only required if using a BU01 Activity and an Expense Account (Account Range: 60000-79999). For all others, you must leave this field empty. 1 = Allowable; 0 = Unallowable'. Below this are three bullet points: 'Empty field: A/U', 'Empty field: A/U (Line 1)', and 'Empty field: A/U (Line 1)'. In the top right corner, there are two buttons: 'Submit Requisition' (highlighted in yellow) and 'Assign Cart'. A red arrow points to the 'Submit Requisition' button. The 'General' tab is selected, and there are links for 'Document Actions', 'History', and a help icon.

C. Requisition Workflow in process

1. After the requisition is submitted, a green check mark will appear in each step as it is completed.
2. If a step shows the Pending sign, you can click on the view approvers link to see who can approve the order.



D. Requisition Workflow completed

1. If your Requisition does not complete or is returned to you, click on the History tab to learn why. If the system returns your requisition, there will be a message explaining the problem.
2. When the Requisition workflow is complete, a Purchase Order (PO) will be created. The PO can be viewed by clicking the View Related Documents link in the upper left corner of the page.

The screenshot shows the requisition workflow completed for 'Requisition: 99875227' at Miners Hospital. The status is 'Completed' with a document total of '110.00 USD'. A 'View Related Documents' link is highlighted in yellow with a red arrow pointing to it. The workflow steps are: 'Submitted' by SHAUNA VINCENT on 3/1/2018 at 10:49 AM; 'CF Validation' (Completed); 'CF Validation Response' (Approved); 'Department Approval' (Approved) by NANCY CHRISTENSEN-MAYER; 'Final CF Validation' (Completed); 'Final CF Validation Response' (Approved); and 'Create PO' (Completed) on 3/1/2018 at 4:22 PM. A 'History' tab is highlighted in the top right corner with a circled '1'. A red arrow points from the 'View Related Documents' link to the 'Create PO' step, which is circled with a '2'.

III. PO Workflow

- A. From the Requisition, click on View Related Documents to view the PO. As the PO number is displayed, click on View to open the PO.

The screenshot shows the 'View Related Documents' link highlighted in yellow with a red arrow pointing to it. Below this link, a pop-up window displays the 'Purchase Order: UI00000409' with 'View' and 'Print' buttons. The 'View' button is highlighted in yellow. The background shows the requisition details for 'Requisition: 99875227' at Miners Hospital.

B. View the PO Workflow

1. Once in the PO document you can see the PO number in the upper left hand corner of the page. Note that from the PO you also have a View Related Documents link, so you can move back and forth from the PO to the requisition very easily.
2. Click to open the PO Approvals tab and the PO workflow will display. Green checkmarks indicate a completed step. All steps in the PO workflow are automated.
3. Revise PO: the system creates the Purchase Order.
4. PO Distribution: the Purchase Order is distributed, or sent to the internal Supplier
5. Flag As Standing Order: a reference to the form used to place this order
6. PO Export: the PO was sent to People Soft, and the PO workflow is complete

The screenshot displays the PO Workflow interface. On the left, a sidebar shows the 'Purchase Order: UI00000514 Revision 0' with a status of 'Completed' and a total of '220.00 USD'. The 'PO Approvals' tab is selected, showing a workflow diagram with six steps: 1. Submitted (SHAUNA VINCENT, 4/13/2018 10:27 AM), 2. PO Approvals, 3. Revise PO (Completed), 4. PO Distribution (Completed), 5. Flag as Standing Order (Completed), and 6. PO Export (Completed). The workflow is marked as 'Completed' with a green checkmark and a timestamp of 4/13/2018 10:27 AM.

C. PO Workflow Completed

Please note that when a PO is created, the PO workflow status is listed as "Completed". This does not indicate that the order is fulfilled or paid for, only that the PO has been created and sent to the internal supplier.

The screenshot shows the PO document details page. The 'Purchase Order: UI00000514 Revision 0' is displayed with a status of 'Completed' and a total of '220.00 USD'. The 'Status' section is expanded, showing 'General Information' and 'Document Status'. The 'Document Status' section is highlighted with a red box, showing 'A/P status' as 'Open' and 'Workflow' as 'Completed (4/13/2018 10:27 AM)'. The 'PO Dispatch' section is also visible, showing the distribution date and time as 4/13/2018 10:27 AM.

| Status | |
|---|--|
| Document Actions History Expand All Cc | |
| ▼ General Information | |
| PO/Reference No. | UI00000514 |
| Revision No. | 0 |
| Supplier Name | UNIVERSITY GUEST HOUSE & CONFERENCE more info... |
| Purchase Order Date | 4/13/2018 |
| Total | 220.00 |
| Shopper | SHAUNA VINCENT |
| Shopper Phone | +1 801-581-2251 |
| Shopper Email | shauna.vincent@hsc.utah.edu |
| Requisition Number | 101746969 view print |
| ▼ Document Status | |
| A/P status | Open |
| Workflow | ✓ Completed (4/13/2018 10:27 AM) |
| PO Dispatch | |
| The system distributed the purchase order using the method(s) indicated below the last time it was distributed: | |
| Email (HTML Attachment): info@guesthouse.utah.edu | |
| Distribution Date/Time | 4/13/2018 10:27 AM |
| Supplier | Sent To Supplier |
| Receiving | none |
| Invoicing | Partially Invoiced |
| Matching | Partially Matched |
| ▼ Lines | |