IFAS 7i

Purchasing Requisitions

Participant's Training Manual

August, 2007

Rev 4

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Overview

Welcome

Introduction

This is a guide for personnel who are to become proficient in using the 7i Purchase Requisition screen and the Purchase Order Addendum screen. These screens are found in the IFAS Purchasing Module.

Objectives

After completing this session, the participant will be able to:

- Identify 7i screen components.
- Compare and contrast the current purchase requisitioning process with the 7i purchase requisitioning and Purchase Order addendum processes.
- Create purchase requisitions in the 7i system.
- Describe the cancellation procedure.
- Explain the steps in creating an addendum to an open Purchase Order.
- Create a requisition with accounts split by percentages.
- Explain the workflow process in 7i.

Review

Process Flow

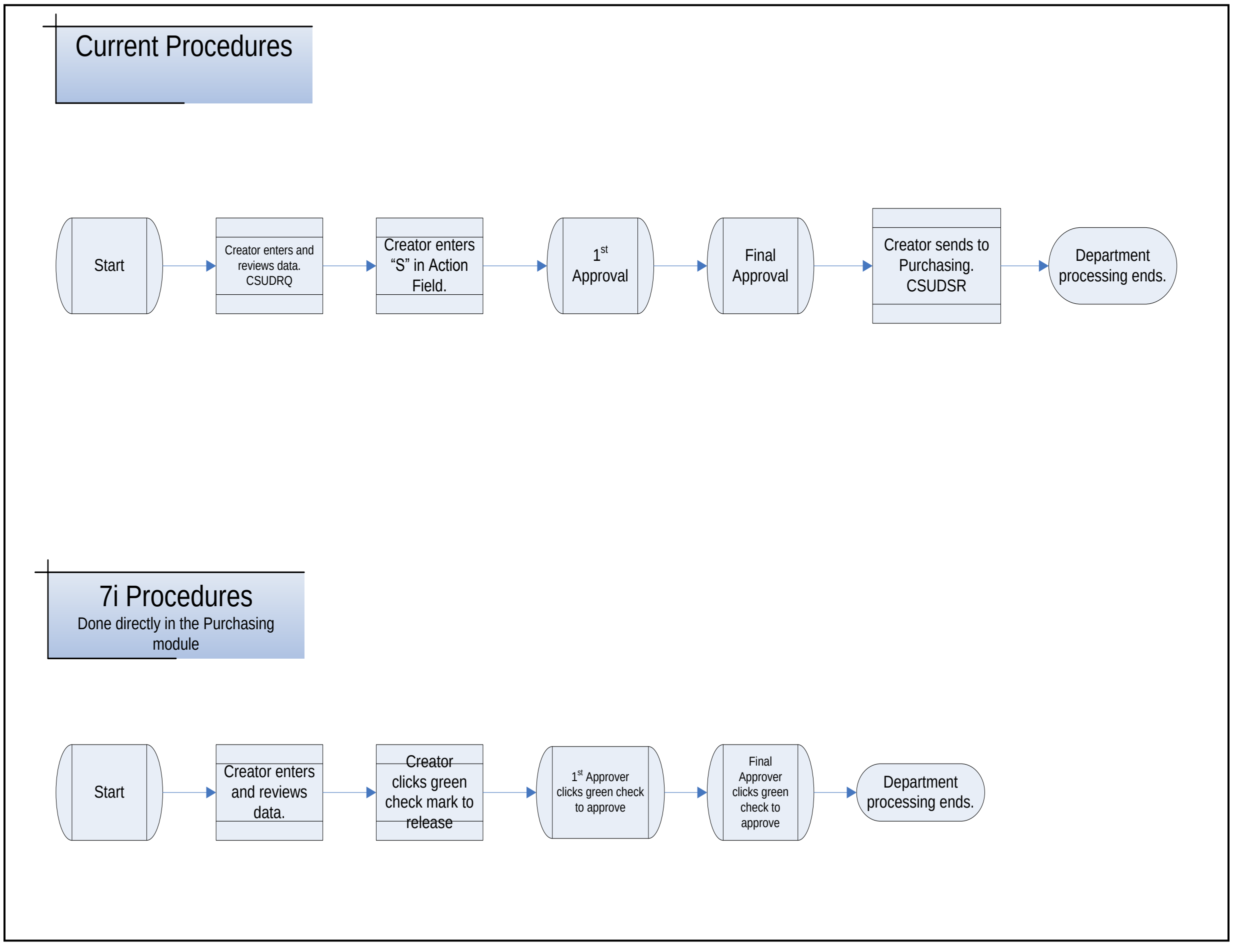

Fig 1

Important Note: With 7i, funds are pre-encumbered after you save. To prevent this, you can enter zero in either the quantity or cost (amount) fields. The Purchase Order Total will read “0.” If the requisition is deleted (only by the final approver), the pre-encumbrance is also deleted.

Screen Review

7i Requisition Screen

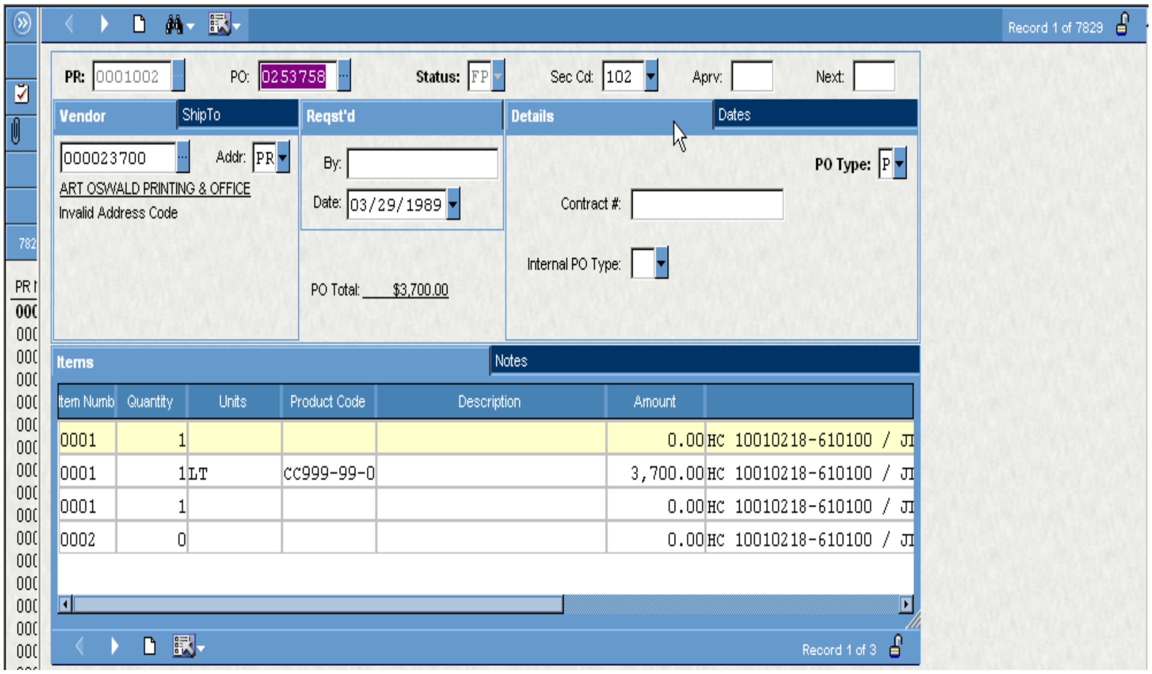

Fig 2

Note: Turn off the Google tool bar, if that option is active.

Part 1: Purchasing Requisitions

Data Entry

Introduction

The data terminology in 7i is the same as that in the IFAS Triad screen. As before, you must have all required fields populated.

Processes

The initial process for creating a requisition in the 7i version of IFAS is **Entering Data**. Basically, you collect the information about the requisition and then enter the information into data fields.

Next is a sequence of reviews and approvals called **Workflow**. After the final departmental approval, the requisition is sent to a purchasing coordinator and then to the buyer who approves or rejects it.

If a purchase order must be cancelled, notification must be sent to the Purchasing Department. The address is **pocancel@hctx.net** and include relevant information.

If additional items are needed for an open purchase order, an **Addendum** is created. In 7i, split accounts are also possible.

If the requisition must be deleted, the final departmental approver can do this up until the requisition is printed.

Data Entry

The basic difference in 7i lies in the "look" of the screen and some navigational changes.

You can move the position of columns, to make data entry faster, if you wish.

Look at the components below.

Data Entry, Continued

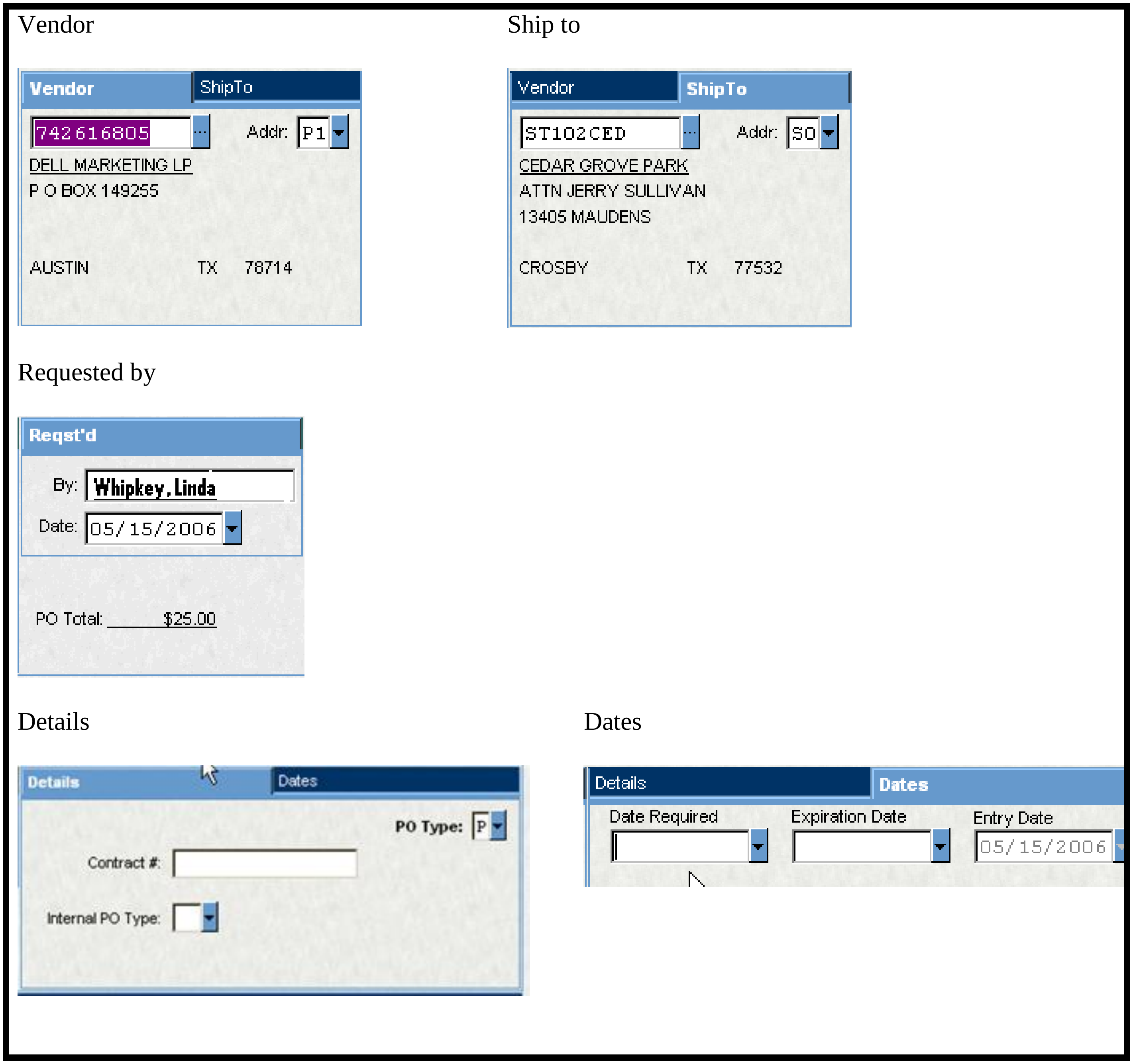

Fig.3

Lookup Function

Lookup

Lookup is a search of a database of records. It is available when you see an ellipsis (…) on a drop-down box. See Figure 4 below.

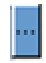

Fig. 4

When you click the ellipsis, choosing **Lookup** will open a Data Lookup dialog box. See Figure 5.

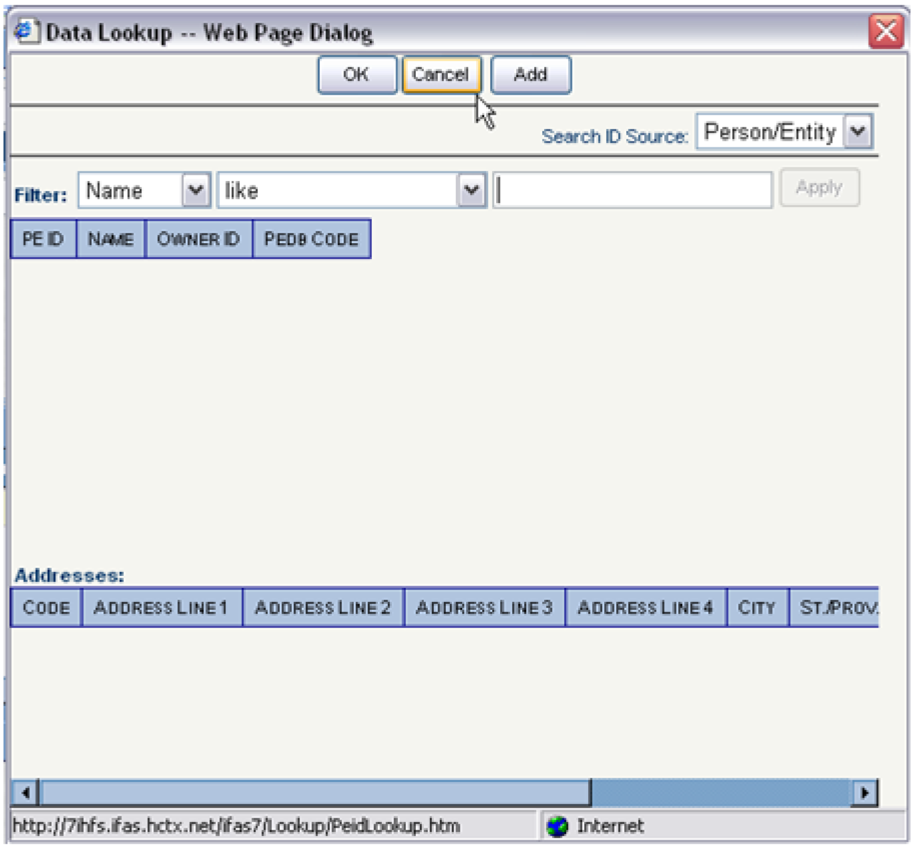

Fig. 5

Lookups are specific to the field you are in; that is, the Vendor field Lookup will search vendor names or PEIDs. *A third choice, **Owner ID**, is not currently being used.*

Note: <u>Do not</u> use an AP address, use PO addresses.

Navigation

Navigation Navigation is done with arrows and tabs. See Appendix A for more detail about the icons.

You can Search for a purchase request or PO by opening the binoculars and selecting Search/Find.

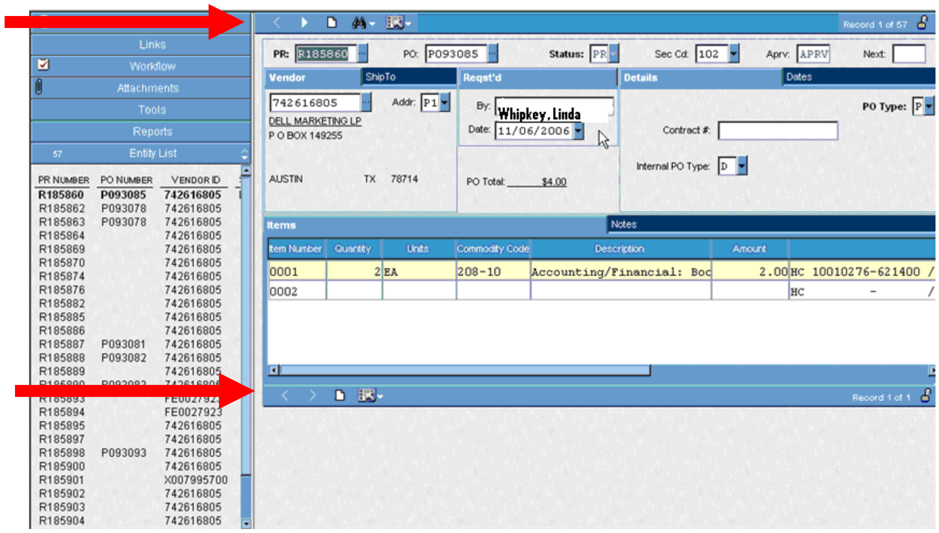

Fig. 6

There is a navigation bar in two locations: at the top for the header and at the bottom for the items requested area.

Copy and Paste You may copy and paste an item into another requisition by using the copy/paste functions in the Options icon.

Search Function and Grid List

Introduction

You can search with a wildcard and display the results with comprehensive information. This avoids you having to look through all of the items listed in the Entity List.

Grid Listing

When you enter search criteria under the binocular's Find/Search function, the resulting list of requisitions appears in the entity list. Rather than going through all the requisitions one at a time, you can choose "Show Grid" under the Options icon.

This grid takes all header information and lists it in columns for each requisition that the search yielded. To close, select "Hide Grid" under the Options icon. Completing a search will lessen the number of requisitions that you see.

Note: The search results are lost once you hide the grid. By default, the system displays all Entity list requisitions when you first open the grid.

Sidebar Functions

Introduction

You can open the sidebar by clicking the double arrow at the top or dragging the right border to the right.

Entity List

This list of purchase requisitions and Purchase Orders appears in the side bar on the first screen after your login to POCSHR or POCSAD. It includes all entities (purchase requisitions and Purchase Orders) that you have security to access. Select the one you want to work on by double-clicking.

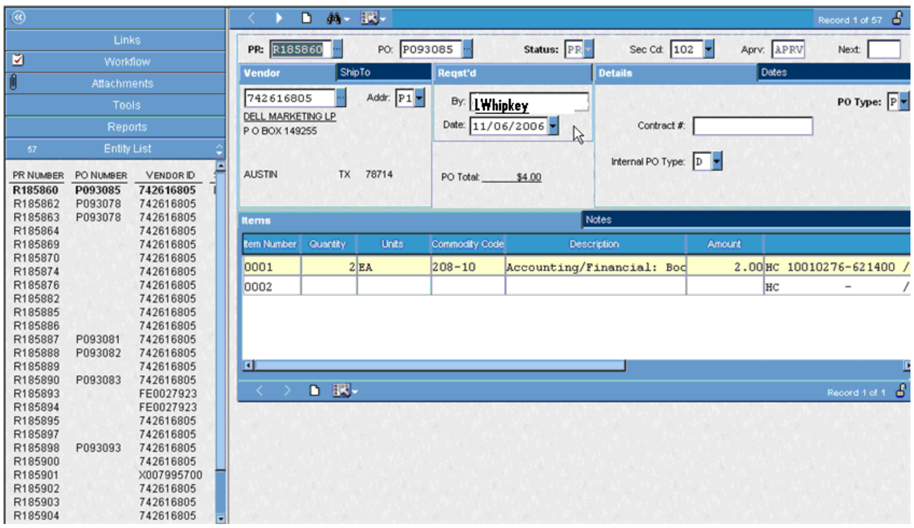

Fig. 6

You can sort this list by number, ascending or descending, and by other criteria by using the Options icon.

Copy and Paste

You may copy and paste an <u>item</u> into another requisition by using the copy/paste functions in the Options icon.

Continued on next page.

Post and Receiving

You can go through POST to find the progress of the document. Receiving will be the same current procedure until further notice.

Workflow

This refers to two things: the *button* on the side bar and the *process* of approving the requisition. The button opens up an area where the workflow approvals are displayed.

When you use Workflow for the first time, you must click the Enable button displayed in the Sidebar.

In 7i, the workflow process shows the actions of users; that is requisition approvals or rejections. You can see a record of those actions on the Workflow screen.

Note: Contact security for problems with approvals.

Let's say there are three users with the WF102SECA approval level: John is #1, the primary approver. Susan is #2 and James is #3. Any of them can approve a requisition, but it will appear on John's **"Purchase Document records waiting my approval"** list because he is the first in the sequence. Susan and James will be able to see that requisition in their "**Purchase Document records waiting Role approval**" lists.

If John has not approved the requisition within a certain period of time, it will be removed from his "**…waiting my approval**" list and put on Susan's. John and James will see it under the **"…waiting Role approval"** list.

Continued on next page.

Workflow continued

In Figure 7 below, there are 10 documents in the "**…waiting my approval**" list. The user can approve or reject them. Below that list, you can see that someone in the WF102SECA role is needed to approve R185604 and R185615. Anyone in the SECA role in department 102 can approve these requisitions by opening the document and clicking the green checkmark. After that approval, the requisition moves to the next approval level and the process repeats.

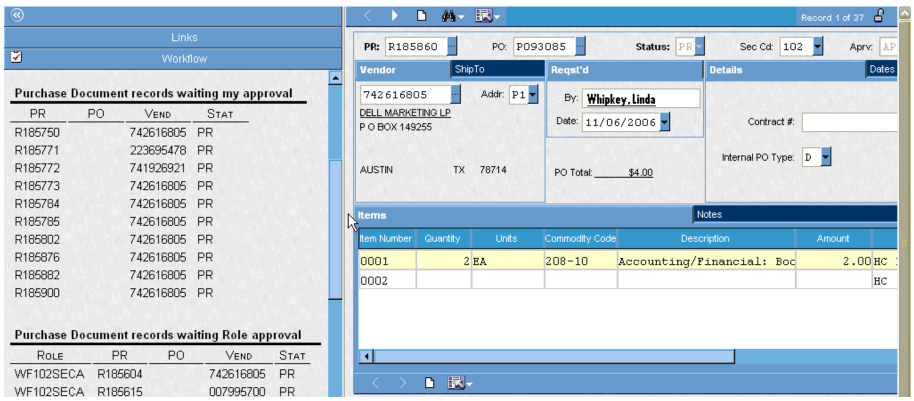

Fig 7

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Sidebar Functions, Continued

Workflow continued

Workflow is a path that a requisition follows as it is reviewed and approved. It is also a communication tool. When you create a requisition and press Enter, press the Refresh button. In Figure 8 below, you see the creator of the requisition listed under the **Purchase Document** list. This is the action list that shows what happens to the requisition.

Purchase Document action list after pressing Refresh.

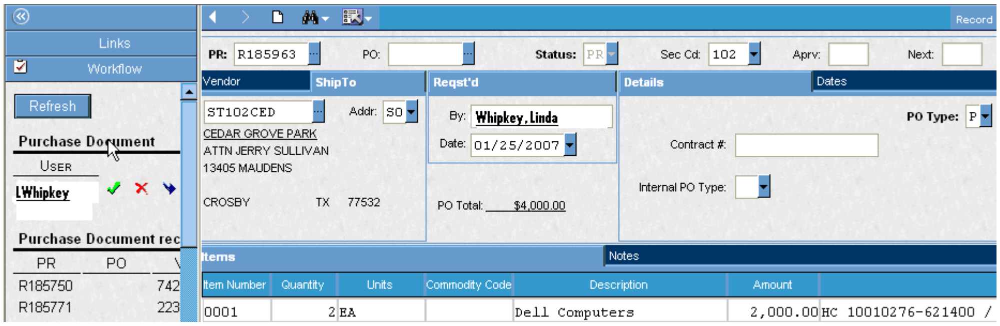

Fig. 8

There are three icons that represent actions: the green checkmark for approvals; the red X for rejections; and a blue arrow. ***Do not use the blue arrow until notified otherwise.*** When the options are in color, you can take action. Action starts with the creator (the first name on the list) releasing it to the first approver by clicking the green checkmark. In the above example, Linda Whipkey is the creator, and can release it to the first approver by clicking the checkmark.

Sidebar Functions, Continued

Workflow continued

Purchase Document action list after pressing Refresh.

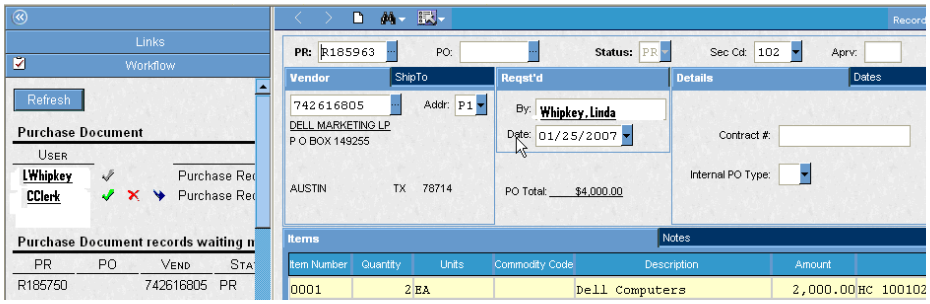

Fig. 9

In Fig. 9, CClerk can now approve or reject the document. If CClerk is not available, another person in CClerk's role can approve or reject the document. Above, LWhipkey is in this role, so she may approve it. After the buyer's approval is completed, the creator receives an e-mail to signify that the requisition has been approved by the buyer. If the requisition has been rejected or changed at any point, the creator receives the requisition back in the list of requisitions that need approval. After release, it follows the same workflow path as before.

When the icons are in color, you have the authority to approve or reject. Click the green checkmark after reviewing the requisition.

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Part 2: Procedures and Practice

Requisitions

Creating a Basic Requisition

Watch the instructor's input for a simple requisition. Refer to the procedures in the User's Manual.

Note: **Do not use the copy option for header information.** .

You may copy **item** details by selecting the item and using the option icon on the bottom navigation bar; then, paste by using the option icon on the new requisition's bottom navigation bar.

Data Entry

Before you begin for the **first time**, you will need to activate the JL key field, so that you can see it. Do that by going to the first item field, tab over to WO and click the down arrow. In the drop down list, check JL side. Now you can start completing the following fields.

- PR # *: One choice in the drop-down menu. Select Seed to insert the next number for the requisition.
- Status: defaults.
- PO: This will be populated automatically after the PR is printed.
- Sec. Code *: The code specific to the department making the req .
- Apprv: blank; populates after the buyer approves the requisition.
- Next: blank; not used.
- Vendor *: Use the vendor code or use the Lookup function.
- Ship to *: Use the Lookup selection in the drop down menu.
- Requested: This tab is populated by the system.
- PO Type *: Defaults to P. Contract only if present.
- Internal PO type: Only use to enter D for Disaster.
- Dates: This tab can be filled out if needed, for example the date needed or the expiration date of a contract.

Note: you can "hover" over an account code to get its description. With fields visible, move your cursor at the end of the field. The description will appear in a white box.

*Required field

Continued on next page

Requisitions Continued

Data Entry
(continued)

Data Entry - Items Requested

Item descriptions are required. In the description field, write specific information about the item. Then, enter GL and JL codes. To do this, you can either type them or go to a Look up dialog box. Place your cursor in the field being searched and use the ellipsis drop down box next to WO field for this. Make the selection. When you enter the org and obj code and then press Enter, Figure 10 occurs. Press Enter again and the record saves with the complete account coding.

The Notes tab allows you to communicate information about the requisition or its components. The FA field is to designate the item a Fixed Asset. Change the N to Y if the item is a fixed asset.

After pressing Enter, you may get a message at the top of the screen. If a red X precedes it, you must change the field that is referenced. Sometimes, however, the system will give you an error that you cannot fix. Then you must go out of the screen and re-enter it.

The requisition is sent to Workflow after the Enter. Open the Workflow button and Refresh the screen. When you see a green check by your name, click it to start processing the data.

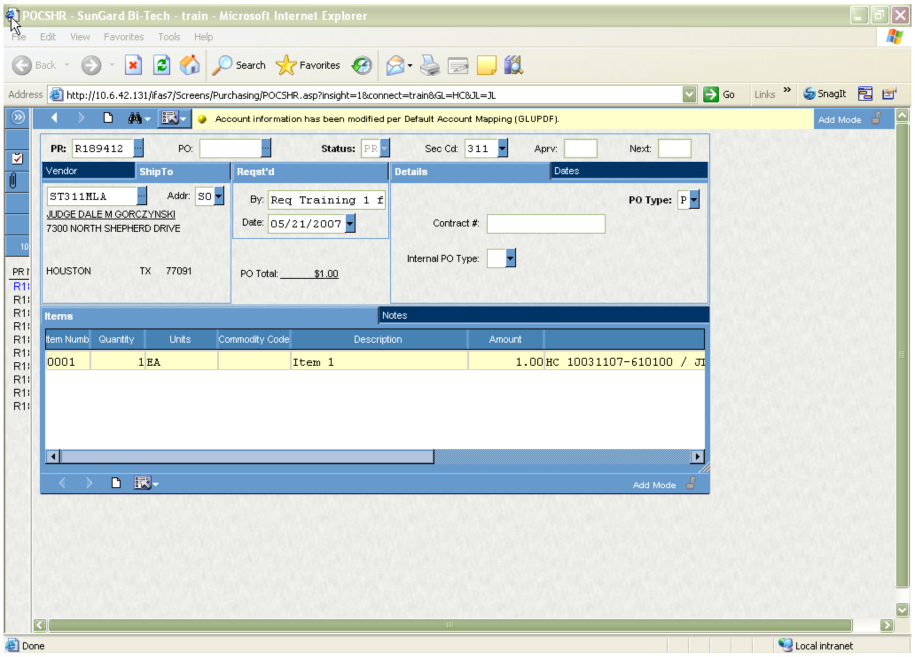

Fig 10

If you see a yellow message in the upper navigation bar, as in Figure 10, simply press Enter again. The system will continue.

Errors

After pressing Enter, you may get a message at the top of the screen. If a red X precedes it, you must change the field that is referenced; for example, you may have to add data into a field that was left blank. Sometimes, however, the system will give you an error that you cannot fix. Then you must go out of the screen and re-enter it.

If you click on a requisition in the sidebar, you may see a message preceded by a yellow dot that says to find the try the POCSAD screen. Go out of POCSHR and open POCSAD. The requisition number should be listed there. Remember, addendums always have a PO number in the PO column.

Field Order

If you like, you can change the order of the fields by dragging and dropping. Simply, place the cursor on the name of the cell you want to move and drag it so that it is in the position where you want it. To drop it, release the mouse. This will be important for the ease of data entry.

Encumbrances

The funds are pre-encumbered on the requisition your are working on when you:

- Save the requisition
- Exit POCSHR or POCSAD
- Leave the requisition
- Perform a Search/Find
- Use the Workflow area to access different PRs to approve

You will see your requisition on POST immediately.

To avoid encumbrance, enter a 0 in the quantity or amount fields. The PO total will be $0.00.

Deleting an Item

To delete a line item, highlight it and click the Options icon on the bottom navigation bar. Select, “Delete Item.”

Focus on Workflow

After saving a requisition by pressing Enter, click the Refresh button until your name appears with the green check mark option. The Refresh cycle can take up to 2-3 minutes.

As a creator, you click the green check mark to release it to the first approver. Before releasing it, be sure that all the data you have entered is correct.

Note: If the creator is also the first approver, once he/she releases it, a second check mark will be automatically listed in grey. A comment will be added to the right hand column that reads, “User already processed.” This is the case with most creators.

Approvers can approve (green check) or reject (red X) the requisition. Approvers are given the opportunity to insert comments about the requisition. These comments should be relevant since they cannot be edited or deleted.

Note: Only a final approver can deleted a requisition, if necessary.

Rejections and Approvals

If the requisition is rejected, its number appears in the creator’s list of approvals needed. The creator makes the changes needed, clicks the green checkmark, and it “flows” through the normal workflow sequence again.

When the requisition is approved, it moves to the next level of approval. At the end of the department sequence, it is transferred by a purchasing coordinator to the buyer. Once the buyer approves the Requisition, an e-mail is sent to the creator.

If a change is made to the requisition by any of the approvers, the requisition then goes to the creator’s “need my approval” list.

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Changes

Note: As an approver, always check the green check mark when the "record accepted" message is given. Read the following scenario:

1. The final approver makes a change to the req. Presses Enter. He does not check the check mark.
2. Final approver goes to lunch with the req still opened.
3. He comes back.
4. He makes another change.
5. Presses Enter again.
6. When he refreshes, he does not see a green checkmark by his name as usual.
7. It does go to the creator because there was a change that was saved; but when he refreshed the list, his name is not included on the workflow list. The user who made the change is not on the workflow list, thus there is no history or proof that he even looked at it.

When you must change the data on the requisition, always enter an explanation after you click the green checkmark in the comments box that appears.

The creator always receives the requisition after a change and, after his/her release, it will continue through the same workflow sequence.

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Role Approvers Each approval role includes a list of names. The primary approver is the first on the list. However, anyone in that role can approve. Refer to Figure 11.

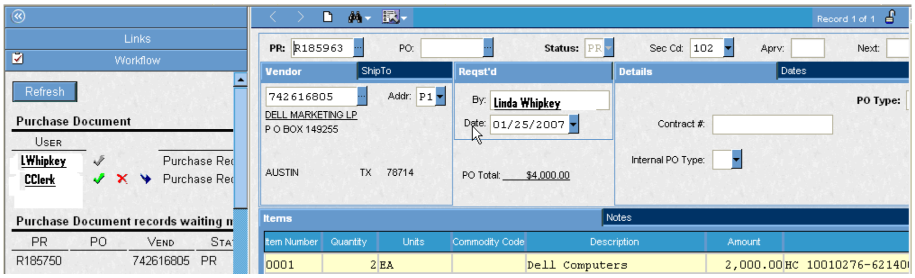

Fig. 11

In Figure 11, LWhipkey is logged in. You see that she was the creator of R185963. After refreshing the screen, she sees the name of the next approver, CClerk. Because she is in the first role, LWhipkey can access the action buttons; that is, they are in color, and she can either approve or reject the requisition. After approving in the place of CClerk, LWhipkey refreshes the screen to show the following figure.

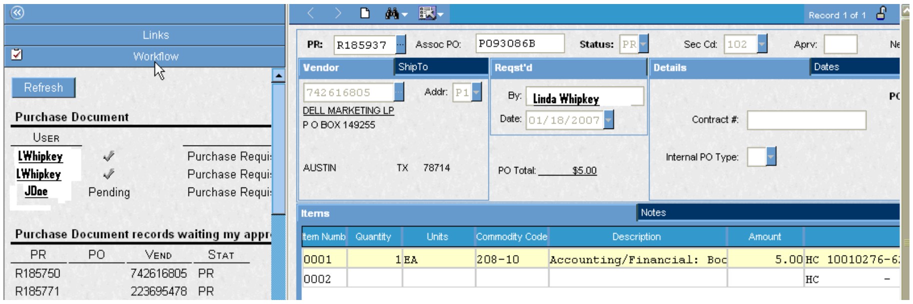

Fig 12

Figure 12 shows that LWhipkey released the requisition as creator and approved it as the first approver. Cclerk is not listed as an approver because Lwhipkey gave the approval. The second role approver, Jdoe, will approve next.

Continued on next page

The buyer

When the buyer approves the requisition through workflow, the creator receives an e-mail to inform him/her of the approval. The buyer's name appears after the last approver and the list ends with the creator's name.

The buyer assigns a PO number to the requisition by printing the PO and this number will appear on the record. If you go to POST and don't see the PO number one day after approval at most, contact the buyer.

Duplicate Approvers

If the creator is also the first approver in the workflow (as above), there will be an automatic check added to a second instance of his/her name. The comment in the last column of the Workflow screen for this approval is, "user already processed" to signify that there is a duplication of approvals.

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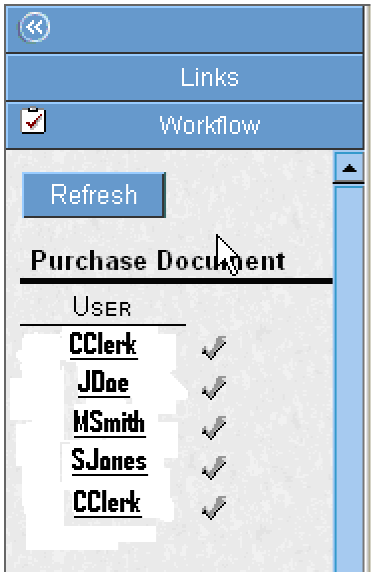
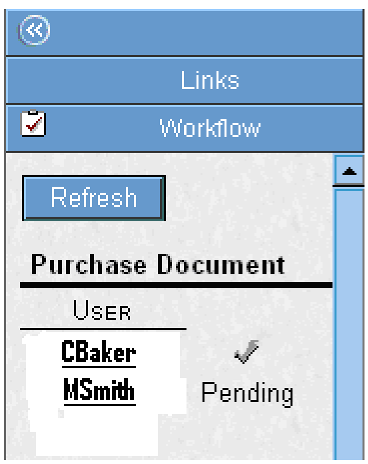
Workflow Practice

Workflow I: Interpret the following workflow. Tell what is happening at each step. SJones is the buyer. What action is designated by CClerk at the end of the sequence?



Workflow II: Who is the first approver in the following example?



Practicing with Requisitions

1. Logon to your computer. Enter Insight and logon to the Train database.
2. Open your workflow button. What can you see on it? Expand it if necessary.
3. Each participant will create a req using the Data Sheet. After saving the document, each person in that row will refresh the Workflow button until their user id appears with a check mark. Click the check. Click the Refresh button. This shows that you as the creator have released the req to Workflow.
4. Record the number of the requisition and make a second one in the same manner.
5. Now, a row will carry one requisition thru the Workflow process:

   Req1 creates a third req. Refresh. Record the req number. Req2 will now approve it. Refresh. Req3 approves the requisition. Refresh. Req4 approves the requisition. After refreshing, the workflow should show that the req goes to the PO Coord.

   The workflow is:

   Req1
   Req2
   Req3
   Req4
   POCOORD

Step 5 is done across the row with Req5, 6, 7 and 8 and with Req9, 10,11,12

Make sure that the Workflow reaches the POCOOD.

6. Now, the others in the row will get their reqs approved by the assigned users. Have the necessary roles approve your requisition until you get to the POCOORD "pending."

Check your Understanding

True or False?

1. In 7i, you must enter data in the CSUDRQ screen.
2. There are only 2 screens used for 7i Purchase Requisitions and Addendums.
3. When the Workflow button has an icon on it, there is some action that must be taken.
4. The tabs in dark blue are active.
5. The Entity List displays all Requisitions and Purchase Orders that you have clearance to access.

Multiple Choice

1. As a User, you must be able to:

   A. show proficiency in using 7i
   B. describe the procedure for cancelling a Purchase Order
   C. be aware of the steps in the Workflow process
   D. All of these

2. In Workflow, you are the first approver of the requisition if you:

   A. created it
   B. are designated as first approver in the workflow
   C. are the first person to navigate to the requisition

3. In 7i, your department is finished processing a requisition when:

   A. the creator enters **S** in the Action field
   B. the creator sends it to purchasing
   C. the buyer approves it and assigns it a PO number
   D. the final approver approves the requisition

Fill in the blank

1. The mask for purchase requisitions in 7i is:

   ____

2. Explain the Workflow process:

   ____
   ____
   ____
   ____
   ____

Answers for Check Your Understanding

True or False

1. False
2. True
3. True
4. False
5. True

Multiple Choice

1. D
2. B
3. D

Fill in the Blank.

1. POCSHR
2. Workflow incorporates the requisition creator, approvers, and purchasing. Approvers review requisitions for any errors. The creator receives an e-mail giving the status of the requisition when it has been approved by the buyer.

Requisitions with Split Accounts

Introduction

Watch the instructor's input for a requisition with a split account.

Creating a Req With a Split Account

Split the account by percent by using the drop down box on the right of the Key Object field.

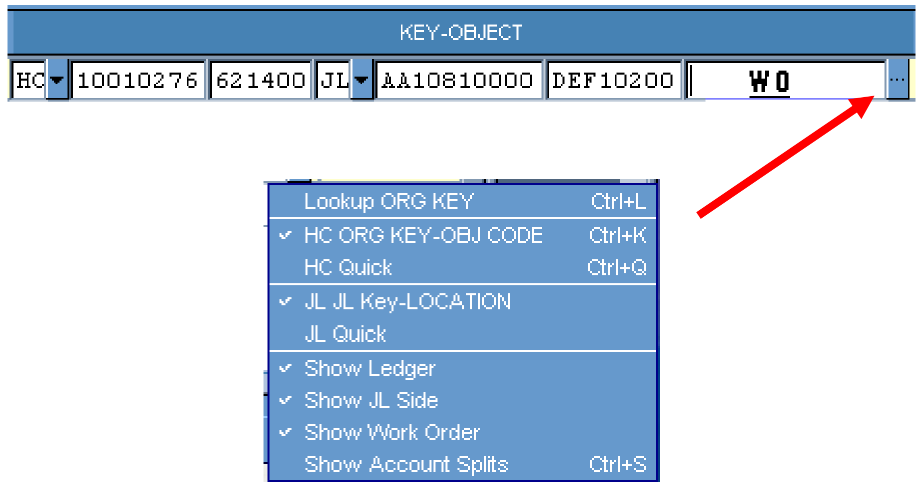


Fig. 13

Choose "Show account splits." Move your cursor to the drop-down box on the right and, unless advised otherwise, choose **Split by Percentages** (see below).

Fig 14

Place the cursor in the Percentage field. Give the percentage for your account code.

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Requisitions with Split Accounts, Continued

With a Split Account
(continued)

Move your cursor to the drop-down box again and select New Account Split. Enter the GL and JL codes for the account that will share the cost.

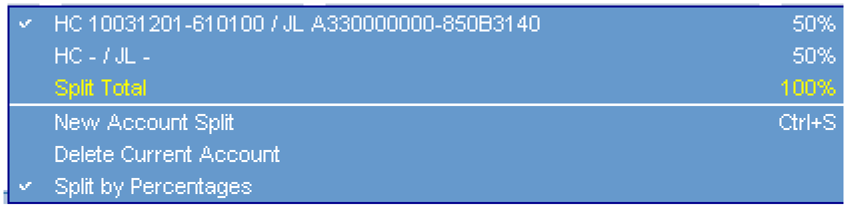


Fig 15

Enter the account coding for the second account and specify the percentage as above. You are now ready to save the requisition and the workflow sequence begins.

Note: The percentages must add up to 100.

If you choose to split by amounts, you may. However, do not have one item split as percentage and another split as amounts.

Deleting a Record

Deleting a line item

To delete a highlighted line item, press Delete Record on the Item options drop down list. A dialog box will ask you to confirm the delete, by asking if you want to delete the current record. This does not mean to delete the entire requisition, only the line item you highlighted. Click Yes to delete the line item.

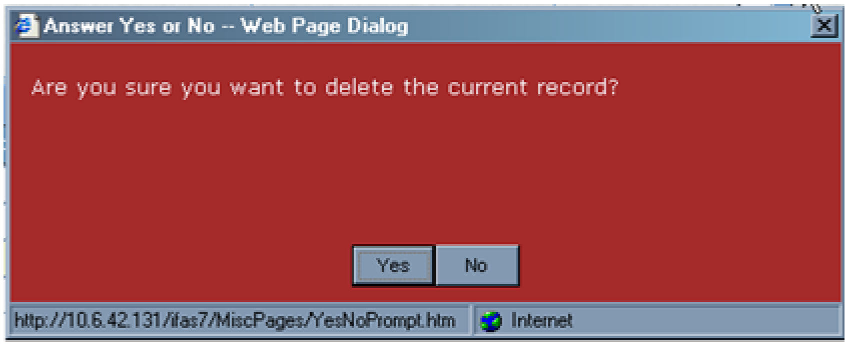


Fig 16

Note: Only the final approver has rights to delete the entire requisition.

Invalid requisitions

If the requisition is discovered as invalid, and if it's in the Buyer's queue, the Buyer can delete it and have the department re-enter it.

To cancel the purchase order, notify Purchasing by sending an e-mail to: pocancel@hctx.net. Specify the purchase order number(s).

Practice

Delete one item from one of your requisitions.

Part 3: Open Purchase Orders and Addendums

Addendums

Introduction

The addendum in 7i has the same function as it did in the Triad screen of IFAS. You may make an addendum to any open Purchase Order by accessing the POCSAD screen. When you do this, the Purchase Order is called up, and you can add items requested and save it as an addendum to the original Purchase Order.

Definition

You may make an addendum to any open Purchase Order by accessing the POCSAD screen. When you do this, the Purchase Order is called up, and you can add items requested and save it as an addendum to the original Purchase Order.

If the PO is **FP or CA ,** it cannot be edited

Procedures

For an addendum to an open Purchase Order complete these tasks.

Step	Action
1	Enter the addendum screen with POCSAD in the command line.
2	Click the New document icon. Enter seed for PR. Enter the **associated PO number** with a letter (A, B, C…) as a suffix.
3	Press Tab.
4	The open PO information appears. You cannot edit the header. Add the item information for the addendum. In the item description, use the following standard. Requisition #R ______, date XX/XX/XX, to ________ (increase or decrease) ____ (detailed description)
5	Save.
6	Review
7	Click the green check mark to release for approvals.
8	The approval sequence is the same as the original PR.

Practicing the Account Split and Addendum

Practice

1. Complete an account split by percentages for one of your requisitions or create a new one. Use your Data Sheet for the codes.

2. Enter the Addendum screen, POCSAD, and enter an open PO number with a suffix. Edit the items requested and enter the standard for the item description.

Notes:

Part 4: Cancelling a Purchase Order

Introduction

The Purchasing Department will cancel Purchase Orders.

Instructions

When a cancellation is necessary, send an e-mail to the Purchasing Department at, **pocancel@hctx.net**. Specify the purchase order number(s). Only the buyer can cancel a PO.

Part 5: Changing a Requisition or Addendum

Introduction

If you make a change to a requisition/addendum, use the comment box that opens after you click the checkmark. Describe what was changed or added.

When you change an item or code and you save the requisition/addendum, after you review it and save it, click the green checkmark. After the change, the Requisition/Addendum will return to the creator.

Standard for comments

Use this standard description for Addendums in the comments box. Remember that comments are permanently attached to the addendum.

Requisition #R _______, date XX/XX/XX, to _________ (increase or decrease) ___________________________(detailed description)

Be as descriptive as you can for any change.

Matching Activity

Match the term on the left to the category where the term applies. Select the best category for the term. You may have more than one letter in a blank.

1.____ D	A. Workflow
2.____ Autoseed	B. Addendum
3.____ Open PO	C. POCSHR
4.____ Percentage	D. Split Account
5.____ Associated PO	E. Entity List
6.____ Cannot edit header	F. E-mail
7.____ Reject/Approve	
8.____ Shows PRs and POs you can access	
9____ Item description must have a standard format	
10.____ R185201B	
11.____ Roles	

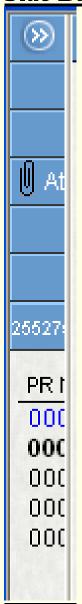
Answers to Matching Exercise

1. C
2. C, B
3. B
4. D
5. B
6 B
7. A,C
8. E
9 B
10. B
11. A

Appendix A Navigation

Term	Location	Function
Arrows 	**Large Arrows under the title bar**	**Go to the next screen > or to the previous screen <**
New Document 	**To the right of the large arrows**	**Opens a new document for data entry; the new document will be in the Add Mode. This is shown on the far right of the Options icon.**
Binoculars 	**To the right of the New Document icon**	**Find/search**
	Find/Search	**A Search function; opens an empty record for entering search criteria**
	Find Extended	**Not used by users**
	Count Records	**Count Entity List records**
	Reselect	**Selects the top record in the Entity List**
	Select All	**Page through the entire Entity List by using arrows**
Options 	**To the right of the binoculars**	**Lists items below**
	Show Grid	**Allows a display of all related records.**
	Sort Order	**Allows a variety of sorts**
	Undo Changes	**Allows to undo the last action**
	Undo All	**Allows to undo all changes**
	Copy Record (in the item navigation bar)	**Copy the highlighted item**

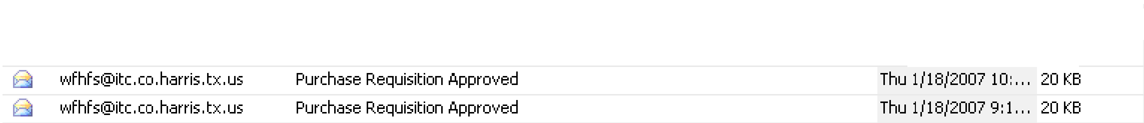
Term	***Location***	***Function***
	Paste, Delete Record	**Pastes the record in the clipboard; deletes the record in the clipboard**
	Close Window	**Closes the current window**
Header	**Area in the top half of the screen; gray in color**	**Identifies data for the current purchase requisition. Data appears in fields.**
	Tabs	**Vendor, Ship to, Requested by, Details, Dates**
Item Requested	**Area in the bottom half of the screen.**	**Identifies the items requested**
	Tabs	***Items*** **Item information listed; item number, quantity, units, commodity code (product code), description, coding, extended amount, etc.**
	Note: Another Options icon is found below the Items Requested area	**The New Document icon creates a new line item after an existing line; this happens if Enter (save) is not pressed.** **The Options icon contains: sort order, undo changes, copy record, all as above. In addition, paste record, delete record, and close record and settings (not used by users).**
Paste Cascading	**Items requested navigation bar**	**Do not use.**

Term	*Location*	*Function*
Side Bar 	**On the left of the mask screen. Appears first with double arrows above it**	**Contains bars that contain relative information. The double arrow either Opens > or closes < the Hide Bar**
Entity List	**One of several horizontal buttons in the Side Bar**	**Lists documents user can access**
Workflow	**One of several horizontal buttons in the Side Bar**	**Shows the flow of the approval process by giving action options and history of approvals**

Appendix B Approval Message

```
WORKFLOW Information


http://10.6.42.121/ifas7/screens/purchasing/pouppr.asp?qbePOPvDsc=&lt;U
niqueKey&gt;192FD354-7179-44F0-A238-FD7D6D91B15F&lt;/UniqueKey&gt

Description:

Purchase Request# = R185938
PR Total$         =     600.00
Requested By      = Whipkey, Linda
Request Date      = 1/18/2007
Entry Date        = 1/18/2007
Vendor            = 742616805-DELL MARKETING LP

                                                        ACCOUNT INFORMATION
                                       ===============================
Item#  Quantity     Price    Item Total Lg    Key       Object   Amt/Pct
===== ========== ========== ========== == ========== ======== ========
0001       1.000     600.00     600.00 HC 10010276   620500

                            Description
                            ==========================================
                            thing


History:
 Who      : Whipkey, Linda
 Status   : Yes
 When     : 1/18/2007 9:26:46 AM


 Who      : Clerk, Clara
 Status   : Yes
 When     : 1/18/2007 9:45:57 AM


 Who      : Doe, Jane
 Status   : Yes
 When     : 1/18/2007 9:48:02 AM


 Who      : Smith, Mick
 Status   : Yes
 When     : 1/18/2007 10:01:21 AM


User=LWhipkey
Model=PR_APRV
Activity=A6
Key=192FD354-7179-44F0-A238-FD7D6D91B15F
Version=4
```

Appendix C Notifications in Outlook



The above graphic shows the Outlook Inbox with two approved messages.

Appendix D Troubleshooting

Important suggestion:

We are suggesting that the users ALWAYS check the green check mark when the "record accept" is seen. The user should always add in the comments that come up when the check mark is clicked to describe what was changed or added to the requisition/addendum.

Reminders:

Creators start workflow. They are the only people who can.

Errors:

If the users receive a red X in the upper navigation bar, two things may have happened.

1. Data may have been entered incorrectly, or not at all.
2. The system has experienced a problem.

If #1 has occurred, you can fix the data entered.
If #2 has occurred, you will have to exit and re-enter the data.

Check marks

If you change the record and check the green check mark, your check mark remains, your name appears, and the req goes back to the creator.

If you <u>change the record</u> and <u>do not</u> mark the green check mark immediately after the ("record accept"message), the next time you refresh, your gray name and check mark option are not visible and the req goes directly to the creator.

NOTE: Always check the green check mark when the "Record Accepted" message is given.

If there is a colored icon (checkmark and X) with your name in the Action list, you have the authority to approve or reject the requisition.

No Workflow Progress

In POCSHR and POCSAD, if workflow seems to be idle (you can see grayed out checkmarks or rejection marks) and the req is not pending in someone's queue, a person with a higher role should change something on the req. The system will respond to the change by sending it back to the creator. The new data that was added (and perhaps inaccurate) can be changed to the original data.

Deleting the Requisition

The final approver can delete the entire requisition or addendum until it is printed and assigned a PO number. This is done under the options icon in the upper navigation bar.

High Level Approvers

The higher level approver can change the information while the requisition is still in the creator's queue (not yet launched into the workflow), however only the creator can check the green checkmark to launch it into workflow.

Masks

If you are on the requisition screen, you will be able to see an addendum number listed in Workflow. If you click on the addendum number in Workflow, you can access the green check mark and click it. But you cannot pull up the addendum record itself and look at the information on the record itself. That's when you get the message below.

Addendums can be approved through workflow from the POCSHR screen and requisitions can be approved through workflow from the POCSAD screen. However, addendums waiting workflow approval cannot be seen on POCSHR, resulting in blank fields, and requisitions waiting workflow approval cannot be seen on POCSAD (blank fields). You receive the above warning. Go to the mask specified to continue.

Looking up ORG KEY

To look up an org key, place your cursor in the org key field and click the drop-down ellipsis at the end of the Key-Object fields. Select "Lookup Org Key." You can do the same for all other Key-Object codes.