

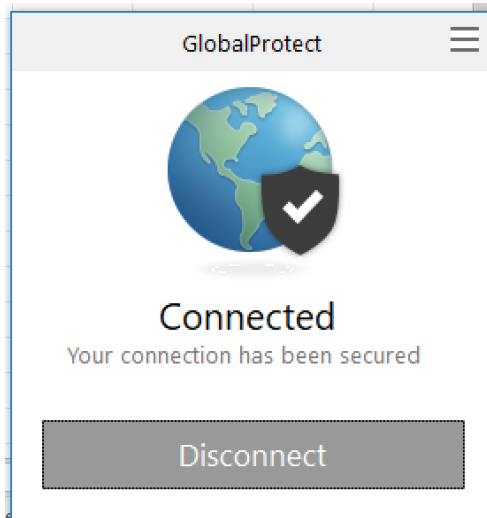
ASI – Disbursement Request Reviewers Queue

Web Client

OnBase Version: 16.0.2.71
Date: 7/22/2020

Starting PolyDoc

1. Ensure you are connected the Cal Poly Global VPN (Virtual Private Network)

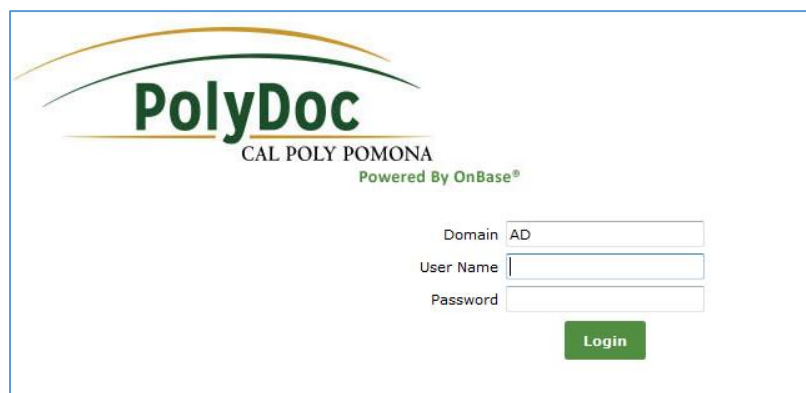


Link to download: https://cpp.service-now.com/ehelp?id=kb_article&sys_id=c40f854e6fe8e600e020f35d5d3ee4d5

1. Go to the PolyDoc Workflow Reviewers Queue:

<https://polydoc.cpp.edu/AppNet/Workflow/WFLogin.aspx?LifeCycleID=159&QueueID=717>

2. Please use your regular credentials to log in.

A screenshot of the PolyDoc login page. The page features the PolyDoc logo at the top, which includes the text "PolyDoc" in a large green font, "CAL POLY POMONA" in a smaller green font, and "Powered By OnBase®" in a smaller green font. Below the logo, there are three input fields: "Domain" with the value "AD", "User Name", and "Password". A green "Login" button is positioned below the input fields.

Workflow – Reviewers Queue

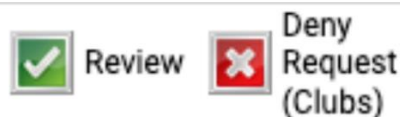
1. Select a Disbursement Request form to view.

The screenshot shows the OnBase workflow interface for a disbursement request. The main area displays a table with the following data:

STATUS	REQUEST	YN TRAVEL ID	AUTHORIZATION #	DATE TIME	FUND #	DEPARTMENT ID	DEPARTMENT ASB CLUB #	DEPARTMENT NAME	CR
ADVISOR	CLUBS	NO		5/21/2020 3:26:05 PM	4	459500		SOCAL SHAKESPEARE FESTIVAL	8C
ADVISOR	CLUBS	NO		5/21/2020 3:16:05 PM	4	459500		SOCAL SHAKESPEARE FESTIVAL	8C
ADVISOR	CLUBS	NO		5/21/2020 3:06:04 PM	4	459500		SOCAL SHAKESPEARE FESTIVAL	8C

Below the table, there are two action buttons: a green checkmark icon labeled 'Review' and a red 'X' icon labeled 'Deny Request (Clubs)'. The interface also includes a 'Preparer's Signature' section with fields for Preparer (MMASLOWSKI), Date (05/21/2020), Permanent Email Address (MMASLOWSKI@CPP.EDU), and Phone Number (8098693900). There is a checkbox for 'Do you want to add a second email address?' and a certification statement. The 'SIGNATURES / APPROVALS' section has fields for Advisor/Department Head (Name: RLBIENC, Date: 05/22/2020) and Authorized Signer (Name: Universal Signer, Date:). A 'Save/Submit' button is located at the bottom left.

2. You can select a Disbursement Request form to view. Notice that you have Tasks:



Notice: Approvers are notified daily that there are disbursement request forms in their queue. After three days, if left in the inbox, the Purchase Order Request will automatically route to the Office of Student Life for review.

- To view an attached Supporting Document(s), select a disbursement request form and scroll down to the Supporting Documents section. Select the **Attached Supporting Document Name** to view it.

Please Attach Any Document(s) Related to this Disbursement Request

ASI - Disbursement Request Supporting Documents
 ASI - Supporting Documents - OFFICE DEPOT - 11/15/2017 []

Attach ASI - Disbursement Request Supporting Documents

Or you can right click anywhere on the form and select Cross References.

DISBURSEMENT REQUEST

ASSOCIATED STUDENTS, INC.
 CALIFORNIA STATE POLYTECHNIC UNIV

For screen reader users, please press spacebar to attach section.

- Keywords
- History
- Cross-References
- Notes

- A dialog box should appear with any supporting documents. Select one to view.

Documents

ASI - Supporting Documents - OFFICE DEPOT - 11/15/2017 []

- You can also add notes in the **Office Only Use** section. Once you have added any notes, click on **Save/Submit** to save the notes.
- To attach any supporting documents, select a disbursement request form and scroll down to the Supporting Documents section. Select **Attach ASI – Disbursement Request Supporting Documents**. A Browse dialog box will appear. Select the supporting documents that you want to attach. Next click on **Save/Submit** to save the attached supporting documents.

Please Attach Any Document(s) Related to this Disbursement Request (If you are unable to submit an attachment please contact ASI for alternative submission methods) (1)

ASI - Disbursement Request Supporting Documents
 ASI - Supporting Documents - OFFICE DEPOT - 11/15/2017 []

Attach ASI - Disbursement Request Supporting Documents

- **Review (Approve):** Selecting this allows you to approve the Disbursement Request. The Disbursement Request will exit this queue

and move to the Finance queue. An Approved email is then sent to the preparer. If you make any changes to the form, you must click on **Save/Submit** to save the changes first.

- **Deny:** Selecting this allows you to deny the disbursement request. You will have to add a reason(s) for denying the request in the Approver's Comments section, which will be emailed to the preparer. If you forget to add a reason(s), the system will then ask you to type in a reason(s). The disbursement request form will then exit this queue and move to the messaging queue where a denied email with the reason(s) specified will be included and sent to the preparer at 6:00 pm. From there, the form will exit workflow.

Retrieval – Reviewers

- **Notice: Reviewers can retrieve all forms submitted only for the account number(s) that they are authorized to approve.**

To find ASI – Disbursement Request Forms, you can search by name, bronco #, date range, or use any of the keywords provided for the form.

Document

Document Retrieval

Document Type Groups

Associated Students Inc

Document Types

ASI - Disbursement Request

ASI - Supporting Documents

From Date

To Date

Keywords

Text Note

YN Travel ID

Authorization Number

Date Time

MM/dd/yyyy hh:mm:ss tt

Fund Number

Department ID

Department Name

Object Code


Description

YN Question

Name

Address

Full-Text Search

1. To search select **Associated Students Inc** for the **Document Type Group**. Next click on the Document Type(s) you want to search for. To select more than one document type, you can select ctrl on your keyboard and click on more than document type.
2. Next, select a **Date Range**. Type in the Name. You can use any of the additional keywords to find the disbursement request form.
3. Next click on the Find button  to search.
4. A list should appear based on the keywords that you used to search.