

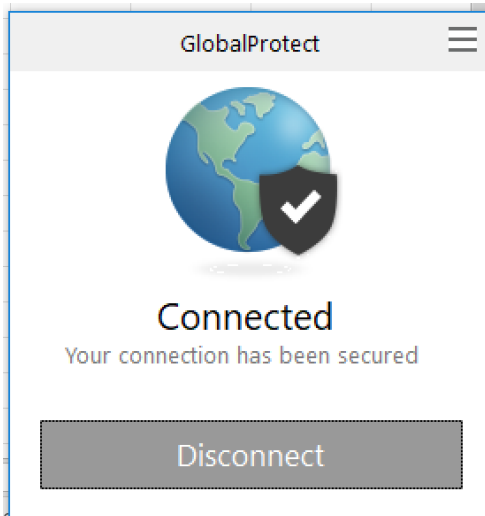
# ASI - Purchase Order Reviewers Queue

**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.servicenow.com/ehelp?id=kb\\_article&sys\\_id=c40f854e6fe8e600e020f35d5d3ee4d5](https://cpp.servicenow.com/ehelp?id=kb_article&sys_id=c40f854e6fe8e600e020f35d5d3ee4d5)

2. Go to the PolyDoc Workflow Reviewers Queue:

<https://polydoc.cpp.edu/AppNet/Workflow/WFLogin.aspx?LifeCycleID=173&QueueID=719>

3. 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 very small green font. Below the logo, there are three input fields: "Domain" with the value "AD" entered, "User Name", and "Password". A green "Login" button is positioned below the input fields.

## Workflow – Reviewers Queue

1. You can select a Purchase Order form to view.

The screenshot shows the OnBase workflow interface. At the top, there's a navigation bar with 'OnBase' and 'inbox' labels. Below that, a table lists three purchase order requests. The table has columns for STATUS, REQUEST, TRAVEL ID, AUTHORIZATION #, DATE TIME, FUND #, DEPARTMENT ID, DEPARTMENT ASS CLUB #, and DEPARTMENT NAME. The first row is highlighted in blue. Below the table, there are sections for 'Preparer's Signature', 'SIGNATURES / APPROVALS', and 'Authorized Signer'. The 'Preparer's Signature' section includes fields for Preparer, Date, Permanent Email Address, and Phone Number. The 'SIGNATURES / APPROVALS' section has a table for Advisor / Department Head with columns for Advisor, Date, Decision, and Title. The 'Authorized Signer' section has a table for Universal Signer with columns for Universal Signer, Date, and Decision. At the bottom, there is a 'Save/Submit' button and a 'Note(s)' section.

STATUS	REQUEST	TRAVEL ID	AUTHORIZATION #	DATE TIME	FUND #	DEPARTMENT ID	DEPARTMENT ASS CLUB #	DEPARTMENT NAME	DR
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

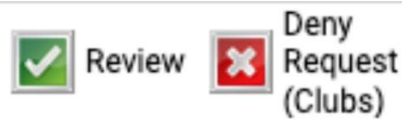
Items: 3  
Review Deny Request (Clubs)

Preparer's Signature  
Preparer: MMADLOWSKI Date: 05/21/2020 Permanent Email Address: MMADLOWSKI@CPP.EDU Phone Number (Numbers Only): 8098693500  
Do you want to add a second email address? \*  
 Yes  No  
 I certify that the item(s) above has/have been received and or services(s) has/have been performed to the satisfaction required. \*

SIGNATURES / APPROVALS  
Advisor / Department Head  
Advisor: RLBLENC Date: 05/22/2020 Decision: Title: \_\_\_\_\_  
Authorized Signer  
Universal Signer: Date: Decision:

Save/Submit  
0 Note(s)

2. Notice that you have Tasks:



**Notice:** Reviewers are notified daily that there are Purchase Order 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 Purchase Order form and scroll down to the Supporting Documents section. Select the **Attached Supporting Document Name** to view it.

**If ordering food, must attach: List of anticipated attendees.**

ASI - Purchase Order Supporting Documents  
[ASI - Supporting Documents - OFFICE DEPOT - 2/7/2018 \[\]](#)

**Attach ASI - Purchase Order Supporting Documents**

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

## PURCHASE ORDER REQUEST



ASSOCIATED STUDENTS, INC.  
CALIFORNIA STATE POLYTECHNIC UNIVERSITY, DOMINA

Keywords

History

Cross-References

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

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

### Documents

[ASI - Supporting Documents - OFFICE DEPOT - 2/7/2018 \[\]](#)

- 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 Purchase Order form and scroll down to the Supporting Documents section. Select **Attach ASI - Purchase Order 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.

**If ordering food, must attach: List of anticipated attendees. If a public event, attach flyer listing detail.**

ASI - Purchase Order Supporting Documents  
[ASI - Supporting Documents - OFFICE DEPOT - 2/7/2018 \[\]](#)

**Attach ASI - Purchase Order Supporting Documents**

- **Review (Approve):** Selecting this allows you to approve the Purchase Order. The Purchase Order 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 Purchase Order. 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 Purchase Order 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.