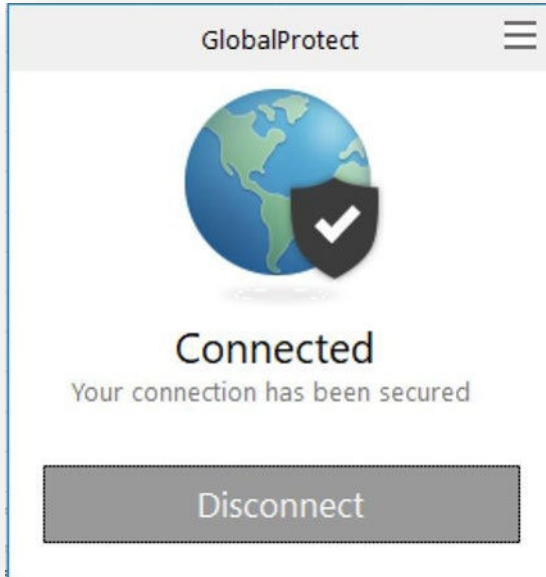


Purchase Order (P.O.) – Reviewer

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



Link to download: https://www.cpp.edu/~geodesign/data_access_vpn_win10.shtml

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.



Workflow – P.O. Reviewers Queue

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

The screenshot displays the OnBase workflow interface. At the top, the browser address bar shows the URL: <https://polydoc.cpp.edu/AppNet/Workflow/WorkflowMain.aspx>. The interface includes a navigation menu on the left with options like 'LIFE CYCLE VIEW' and 'WORK FOLDER'. The main area is titled 'inbox' and contains a table of items. Below the table, there are sections for 'Preparer's Signature', 'SIGNATURES / APPROVALS', and 'Authorized Signer'. A 'Save/Submit' button is located at the bottom left of the form area.

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

Items: 3
Review Deny Request (Clubs)

Preparer's Signature

Preparer: Date: Permanent Email Address*: Phone Number (Numbers Only)*:

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: Date: Decision: Title:

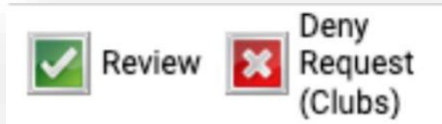
Authorized Signer

Universal Signer: Date: Decision:

Save/Submit

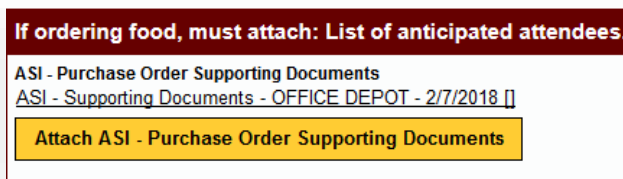
0 Note(s)

5. Notice that you have Tasks:



6. **NOTE:** 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 Student Engagement, Leadership, and Success Office for review.

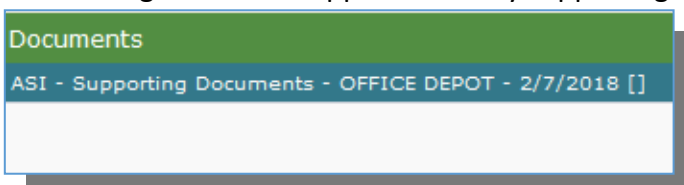
To view an attached Supporting Document(s), select a Purchase Order form and scroll down to the Supporting Documents section. Select the Attached Supporting Document Name to view it.



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



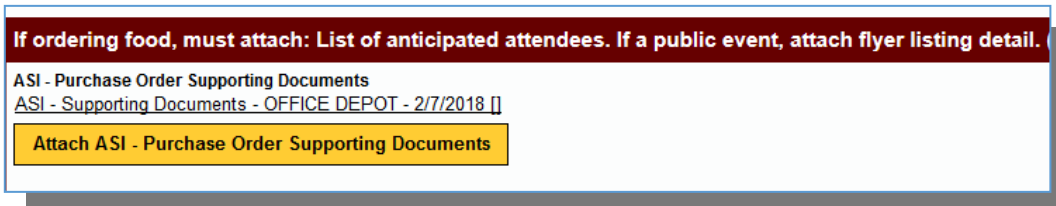
7. A dialog box should appear with any supporting documents. Select one to view.



8. 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.

9. 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.




10. **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.
11. **Request Additional Information:** Selecting this allows you to request supplemental information of the preparer. They will receive an email with instructions to attach this additional information. Please note, once they have submitted this information, you will still have to approve the request for it to be routed to Financial Services.
12. **Deny:** Selecting this allows you to deny the Purchase Order. You will have to add a reason(s) for denying the request in the Reviewer'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 – P.O. Reviewers

NOTE: 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.

The screenshot shows the 'Document Retrieval' interface. At the top, there's a 'Document' header and a 'Document Retrieval' dropdown. Below that, 'Document Type Groups' is set to 'Associated Students Inc'. Under 'Document Types', 'ASI - Disbursement Request' is selected. There are 'From Date' and 'To Date' fields. The 'Keywords' section is expanded, showing various search criteria: YN Travel ID, Authorization Number, Date Time, Fund Number, Department ID, Department Name, Object Code, Description, YN Question, Name, and Address. A 'Full-Text Search' field is at the bottom. A red box highlights the 'Document Type Groups' and 'Keywords' sections. A red arrow points to the 'ASI - Disbursement Request' option.

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. A list should appear based on the keywords that you used to search.