Quick Search

1. Click located in header, leave All or click on dropdown and choose from list.

2. Enter what you want to search for then press enter, see examples below.

3. All documents associated with the number entered will be listed. If only 1 document is associated with the number entered you will automatically be brought to that document.

4. To open, click on document.
View my Requisitions

1. From the menu, hover over My Orders, then click on My Requisitions.

![Menu Screenshot]

2. A list of Requisitions created by you in the last 90 days will appear in number order from newest to oldest.
   - If requisition has a Complete, the approval process is completed so a Purchase Order has been created.
   - If requisition has a Pending, the approval process is not complete.

3. To view a requisition, click on the number in blue.

![Requisition List Screenshot]

4. Your requisition will open. View summary information or click on any of the tabs to view more information.

![Requisition Details Screenshot]

**Examples:**

- To look at an attachment, click on Attachments then click on the attachment to open.
- To see when your department admin submitted your requisition (faculty only), click History and look for date/time your cart was submitted.
5. To see the workflow process of a **Pending** requisition go to the *Pending* box.

6. **Pending** displays the Requisition workflow process.
   a. Click the ➔ next to *What's next?*
   b. The workflow process displays. The approval step the Requisition is currently in will be in blue. Click to expand and view assigned approvers.

**View my Purchase Orders (PO)**

1. From the 📗 menu, hover over *My Orders*, then select *My Purchase Orders*.

2. A list of POs created by you in the last 90 days will appear in number order from newest to oldest.
   - If the PO has a **Complete** the approval process is completed so your order has been placed.
   - If the PO has a **Pending**, the approval process is not completed.
3. Review the Matching Status column to determine where document is in the process.

**Examples**

<table>
<thead>
<tr>
<th>Matching Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fully Matched</td>
<td>Receipt(s) and invoice(s) entered and matched to PO</td>
</tr>
<tr>
<td>Partially Matched</td>
<td>Some receipts or invoices have been entered</td>
</tr>
<tr>
<td>No Matches</td>
<td>No receipts or invoices have been entered</td>
</tr>
<tr>
<td>Partially Invoiced</td>
<td>Some receipt(s) and invoice(s) entered and matched</td>
</tr>
<tr>
<td>Over Invoiced</td>
<td>Invoiced received exceed the PO</td>
</tr>
</tbody>
</table>

4. To view a PO, click on the number is blue.

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Supplier</th>
<th>Created Date/Time</th>
<th>PO Status</th>
<th>Requisition Number</th>
<th>PO Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>P00001140</td>
<td>Lowe's Home Centers LLC</td>
<td>7/1/2019 2:46:56 PM</td>
<td>Completed</td>
<td>2691029</td>
<td>Donna Macintosh</td>
</tr>
</tbody>
</table>

5. Your PO will open. View summary information or click on any of the tabs to view more information.

**Examples:**
- To see receipt(s) entered, click Receipts then click on number in blue to open.
- To see invoice(s) entered, click Invoices then click on number in blue to open.
- To read Comments, click Comments then choose All from drop down.

**View my Invoices/Credit Memos (CM)**

1. From the menu, hover over My Orders, then click My Invoices.

2. A list of invoice/cms created by you in the last 90 days will appear in date order from newest to oldest.
   - If the invoice/cm has a Complete, the invoice approval process is completed.
   - If the invoice/cm has a Pending, the invoice approval process is not completed.
3. Review the *Pay Status* column to determine where document is in the process.

<table>
<thead>
<tr>
<th>Payment Status</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Process</td>
<td>Invoice/CM submitted but approval process not completed</td>
</tr>
<tr>
<td>Payable</td>
<td>Invoice/CM submitted, approval process completed</td>
</tr>
<tr>
<td>Paid</td>
<td>Invoice/CM submitted, approval process completed and invoice is paid</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Invoice/CM submitted then cancelled by Controller’s office</td>
</tr>
</tbody>
</table>

4. To view an invoice/cm click on the number in blue.

5. Your invoice/cm will open. View summary information or click on any of the tabs to view more information.

Examples:
- To see the approval steps, click *Approvals*.
- To look at an attachment, click on *Attachments* then click on the attachment to open.
- To read Comments, click *Comments* then choose *All* from drop down.