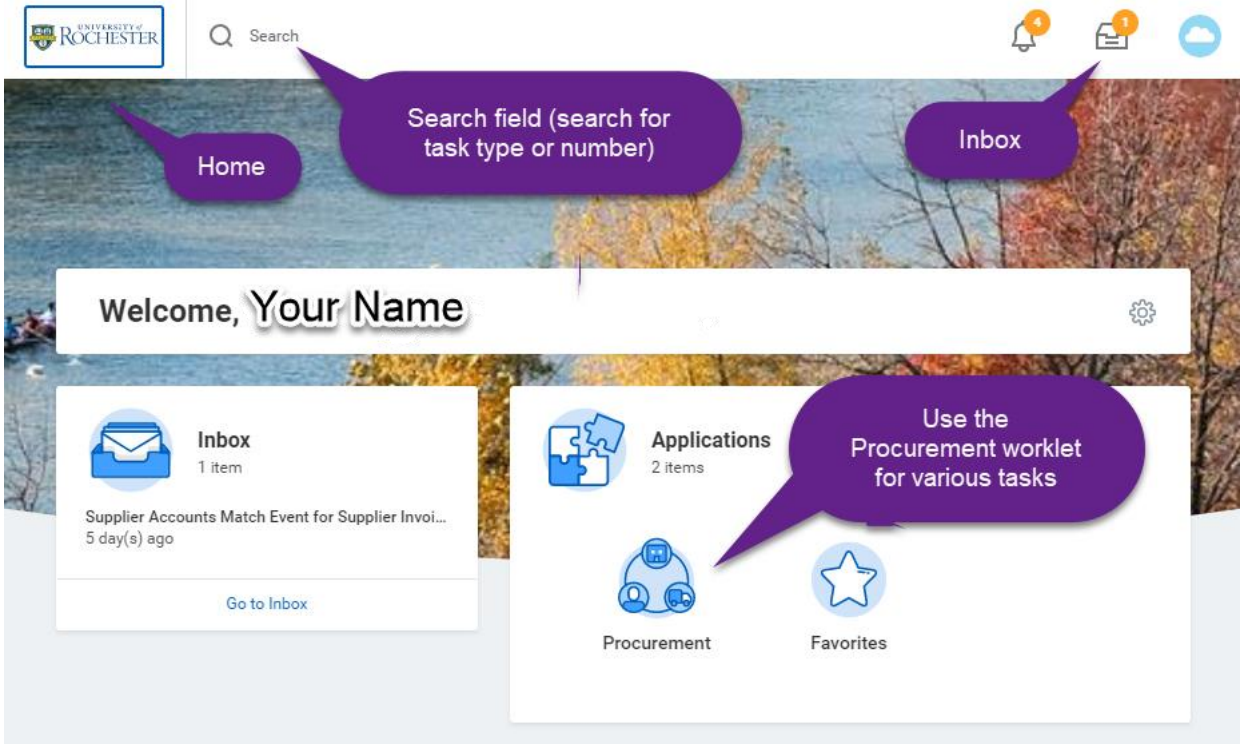
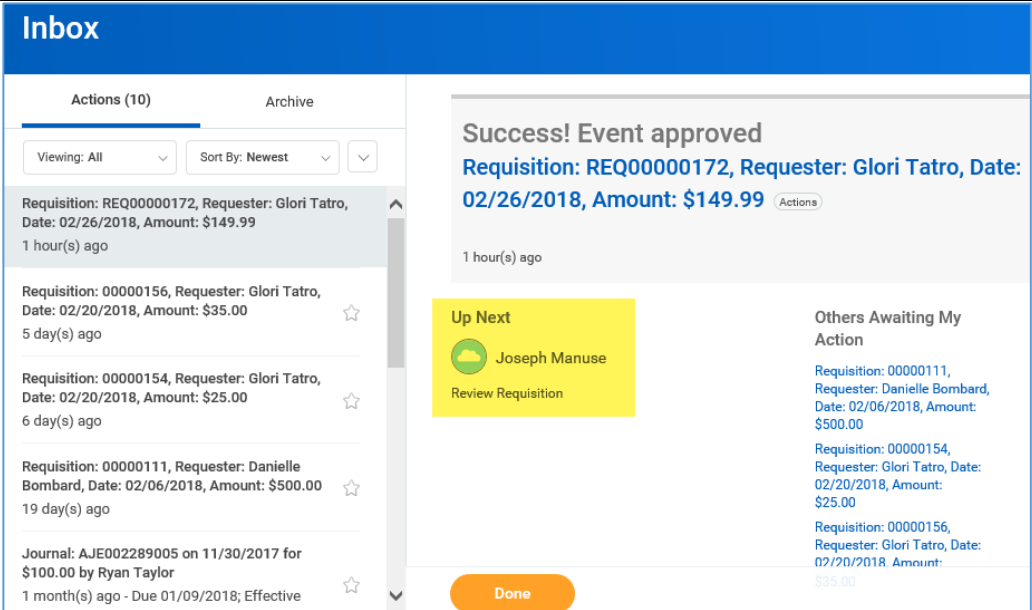
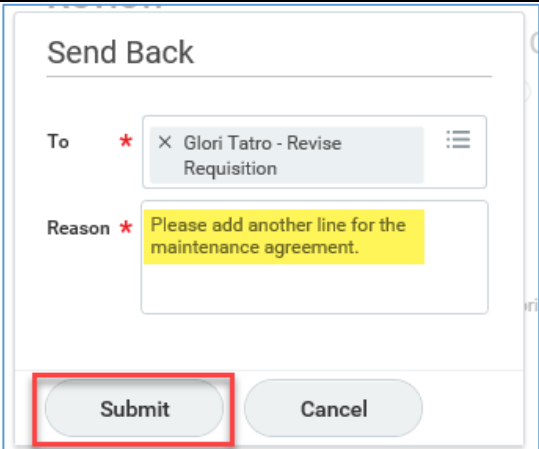


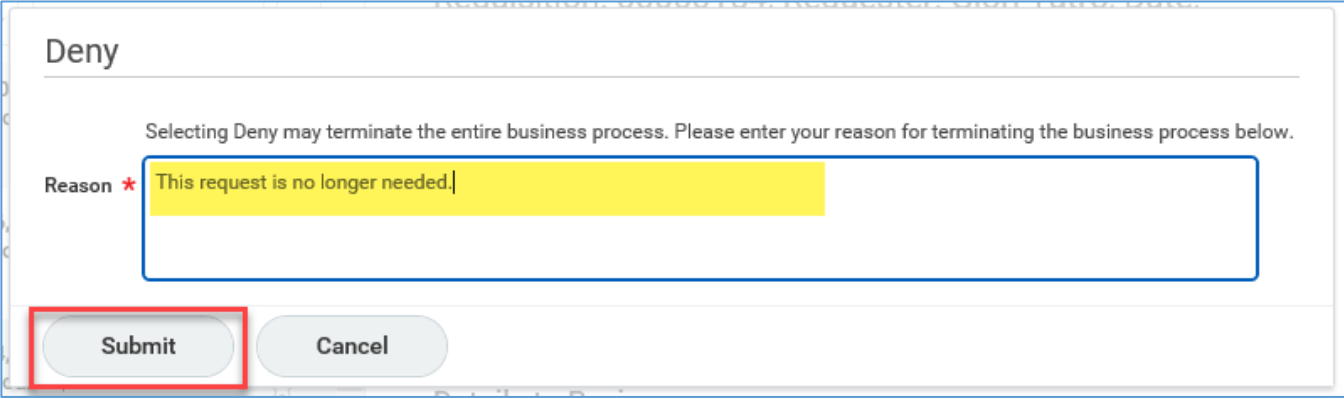
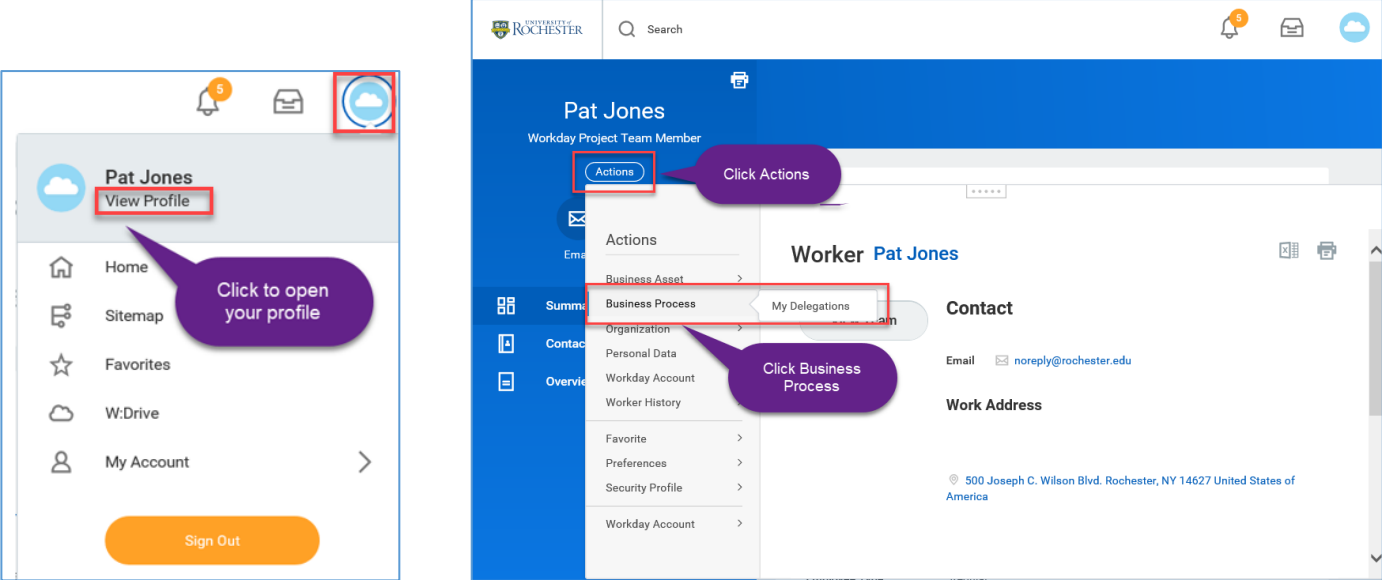
UR Procure to Pay – Requisition, Change Order and Supplier Invoice Request Review and Approvals

Implementation Tenant - <https://wd5-impl.workday.com/rochester3>

Instructions	Details and Screenshots
<p>Home page:</p> <ul style="list-style-type: none">• Use the UR logo to return to this Home screen• Use the Search field with keywords• Use the Inbox for Workday messages• Use the Procurement application for frequently used tasks and reports	 <p>The screenshot shows the Home page of the UR Procure to Pay system. At the top left is the University of Rochester logo. To its right is a search bar with a magnifying glass icon and the text 'Search'. In the top right corner are three icons: a bell with a notification count, a document with a notification count, and a cloud icon. Below these is a large banner with a background image of autumn trees. The banner contains the text 'Welcome, Your Name' and a settings gear icon. Below the banner are two main sections. The left section is titled 'Inbox' with a mail icon and shows '1 item' with a preview of a 'Supplier Accounts Match Event for Supplier Invoi...' dated '5 day(s) ago' and a 'Go to Inbox' link. The right section is titled 'Applications' with a puzzle piece icon and shows '2 items'. Below this are two icons: 'Procurement' (a person with a magnifying glass) and 'Favorites' (a star). A purple callout bubble points to the 'Applications' section with the text 'Use the Procurement worklet for various tasks'. Another purple callout bubble points to the search bar with the text 'Search field (search for task type or number)'. A third purple callout bubble points to the 'Home' text in the banner with the text 'Home'.</p>
<p>Approval Features & Rules</p>	<ul style="list-style-type: none">• By selecting <Approve>, you are agreeing to commit funds for goods or services up to your approval authority• Be sure to review any attachments• The types of business processes that you are approving may include: Requisitions (312 Requisition replacement), Change Orders and Supplier Invoice Requests (F4/request for payment replacement)• Mobile approval app available for iOS and Android for Requisitions and Change Orders• You can set up Delegations• Reminder notifications will be sent for overdue tasks

Instructions	Details and Screenshots										
<div>Inbox</div> <ul style="list-style-type: none">• The Actions tab contains items that require action• The Archive section contains items on which you've taken action• Select the requisition that you want to review• Can scroll to review various sections of the requisition• If additional information is required on the requisitions, select <Send Back> and enter a reason why the requisition is being returned to the requester• If the requisition meets all requirements, select <Approve>• Use with caution. If the requisition should not be completed, select the <...> button and then <Deny> to deny the entire transaction	<div><div><div><div>Inbox</div><div><div>Actions (11)</div><div>Archive</div></div><div><div>Viewing: All</div><div>Sort By: Newest</div></div><div><div>Requisition: REQ00000172, Requester: Glori Tatro, Date: 02/26/2018, Amount: \$149.99</div><div>1 hour(s) ago</div></div><div><div>Requisition: 00000156, Requester: Glori Tatro, Date: 02/20/2018, Amount: \$35.00</div><div>5 day(s) ago</div></div><div><div>Requisition: 00000154, Requester: Glori Tatro, Date: 02/20/2018, Amount: \$25.00</div><div>6 day(s) ago</div></div><div><div>Requisition: 00000111, Requester: Danielle Bombard, Date: 02/06/2018, Amount: \$500.00</div><div>19 day(s) ago</div></div><div><div>Journal: AJE002289005 on 11/30/2017 for \$100.00 by Ryan Taylor</div><div>1 month(s) ago - Due 01/09/2018; Effective 11/30/2017</div></div><div><div>Requisition: 00000039, Requester: Sophill Butler [C], Date: 12/05/2017, Amount: \$12.00</div><div>2 month(s) ago</div></div><div>Review Supplier Invoice Schedule: Supplier Invoice</div></div></div><div><div><div>Review</div><div>Requisition: REQ00000172, Requester: Glori Tatro, Date: 02/26/2018, Amount: \$149.99</div><div>1 hour(s) ago</div><div><div>For</div><div>REQ00000172</div></div><div><div>Overall Process</div><div>Requisition: REQ00000172, Requester: Glori Tatro, Date: 02/26/2018, Amount: \$149.99</div></div><div><div>Overall Status</div><div>In Progress</div></div><div>Details to Review</div><div><div>> Shipping Address</div><div>> Information</div><div>> Goods</div></div><div>1 item</div><table><tr><th>Line</th><th>Image</th><th>Item</th><th>Supplier Item Identifier</th><th>Fulfillment Source</th></tr><tr><td></td><td></td><td></td><td>SupplierPartNumber123</td><td>Purchase Order</td></tr></table><div><div>Approve</div><div>Send Back</div><div>...</div></div></div></div></div>	Line	Image	Item	Supplier Item Identifier	Fulfillment Source				SupplierPartNumber123	Purchase Order
Line	Image	Item	Supplier Item Identifier	Fulfillment Source							
			SupplierPartNumber123	Purchase Order							

Instructions	Details and Screenshots
<ul style="list-style-type: none"> If <Approved> is selected, the approver will be able to see who is up next in the approval sequence 	 <p>The screenshot shows the 'Inbox' interface with a list of requisitions on the left and a success message on the right. The requisitions list includes details such as Requisition ID, Requester Name, Date, Amount, and time since creation. The success message states 'Success! Event approved' for Requisition: REQ00000172, Requester: Glori Tatro, Date: 02/26/2018, Amount: \$149.99. Below the success message, there is a 'Up Next' section showing Joseph Manuse as the next reviewer, and a list of 'Others Awaiting My Action' with their respective requisition details.</p>
<ul style="list-style-type: none"> If <Send Back> is selected, you must enter a reason the requisition is being returned to the requisitioner 	 <p>The screenshot shows the 'Send Back' form. The 'To' field is set to 'Glori Tatro - Revise Requisition'. The 'Reason' field contains the text 'Please add another line for the maintenance agreement.' The 'Submit' button is highlighted with a red box.</p>

Instructions	Details and Screenshots
<ul style="list-style-type: none"> If <Deny> is selected, this will terminate the entire request 	
<p>Manage Delegations</p> <ul style="list-style-type: none"> Select the <i>cloud</i> icon on the UR Procurement home page Select <View Profile> to open your profile to manage Delegates Select the <Actions> button on your profile Select <Business Process> and the process you which to set up delegates. 	

Instructions	Details and Screenshots												
<ul style="list-style-type: none"> Enter the begin and end date Choose a delegate. Either peer (recommended) or Superior (your Superior may already be part of the work flow) Use the Default Alternate or uncheck and choose an alternate Do Inbox Tasks for all Business Processes or Select specific Business Processes 	<p>New Delegation 1 item</p> <table border="1"> <thead> <tr> <th></th> <th>*Begin Date</th> <th>End Date</th> <th>*Delegate</th> <th>Start On My Behalf</th> <th>Do Inbox Tasks</th> </tr> </thead> <tbody> <tr> <td></td> <td>07/03/2018</td> <td>07/09/2018</td> <td> Delegate * <input type="text"/> </td> <td><input type="text"/></td> <td> <input checked="" type="radio"/> For All <input type="radio"/> For Specific <input type="radio"/> None </td> </tr> </tbody> </table> <p> <input checked="" type="checkbox"/> Use Default Alternate Alternate Delegate * <input type="text"/> </p> <p> <input checked="" type="checkbox"/> Retain Access </p> <p> <input type="button" value="Submit"/> <input type="button" value="Save for Later"/> <input type="button" value="Cancel"/> </p>		*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks		07/03/2018	07/09/2018	Delegate * <input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> For All <input type="radio"/> For Specific <input type="radio"/> None
	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks								
	07/03/2018	07/09/2018	Delegate * <input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> For All <input type="radio"/> For Specific <input type="radio"/> None								