# PeopleSoft Financials
# Attaching Supporting Documentation – Requisitions



## Overview

This document will provide information on how to upload and view supporting documentation for PeopleSoft Financials Requisition transactions. It will also indicate how to view documentation that Contracting and Purchasing Services has uploaded for Purchase Orders.

**Note:** At this time, Contracting and Purchasing Services is the only area that can upload Purchase Order documents. Departments should upload their documentation to the corresponding Requisition.

Supporting documentation is a key component of a Requisition transaction. Together, the documentation and the Requisition create a complete picture of the transaction. The new functionality that has been implemented in PeopleSoft Financials utilizes the OnBase system to attach/view supporting documentation right from the PeopleSoft.

Having all of the information (Requisition transaction and supporting documentation) together in one spot that is accessible from anywhere with internet access allows for:

- Expedited and more informed approval and completion of the Requisition.
- Contracting and Purchasing Services to easily access the documentation needed to create the Purchase Order.
- Easier access to supporting documentation as future questions arise about the transaction.

## Requirements

This functionality is now live. Starting **March 1st, 2017**, it is expected that all new requisitions going forward will have supporting documentation uploaded into the system. In the meantime, it is highly recommended that you start uploading the documentation now so that you can evaluate your processes and make adjustments as necessary to be ready for March 1st.

**Types of Documentation to Upload to Requisition:**

- Quotes
- Approvals
- Signed Purchase Order (DPT Origin only)
- Any other documentation that you would normally have stored in your paper file

PeopleSoft and OnBase are the systems of record so you **do not** need to keep the paper copies as long as they have been uploaded to OnBase.

**Time Frame:**

Documentation should be available for review by the approver prior to applying their approval. As such, documentation should be uploaded once the Requisition is submitted and before it is approved.

At times, additional documentation may become available after the Requisition is approved. In these cases, documentation can continue to be added to Requisitions even after it is approved and/or the Purchase Order has been created.

## Documentation Upload Process

This section will detail how to upload supporting documentation for Requisitions.

There are 3 pages in PeopleSoft where Requisition documentation can be uploaded:

1. Requisition Confirmation
2. Requisitions Approval
3. Manage Requisitions

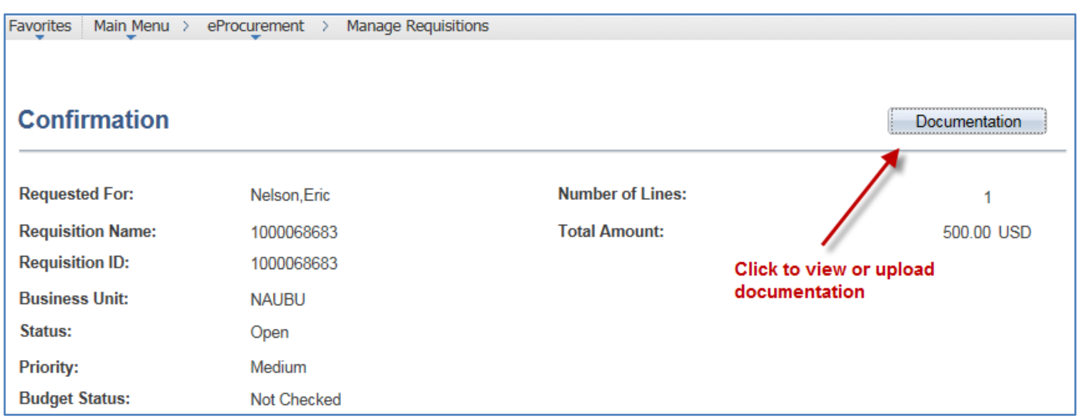
In order to access the Requisition on these pages (and upload documentation) you must have already saved the Requisition and been assigned a Requisition number.

The process for uploading is the same from all 3 pages and is the same as PCard and Journal processes.

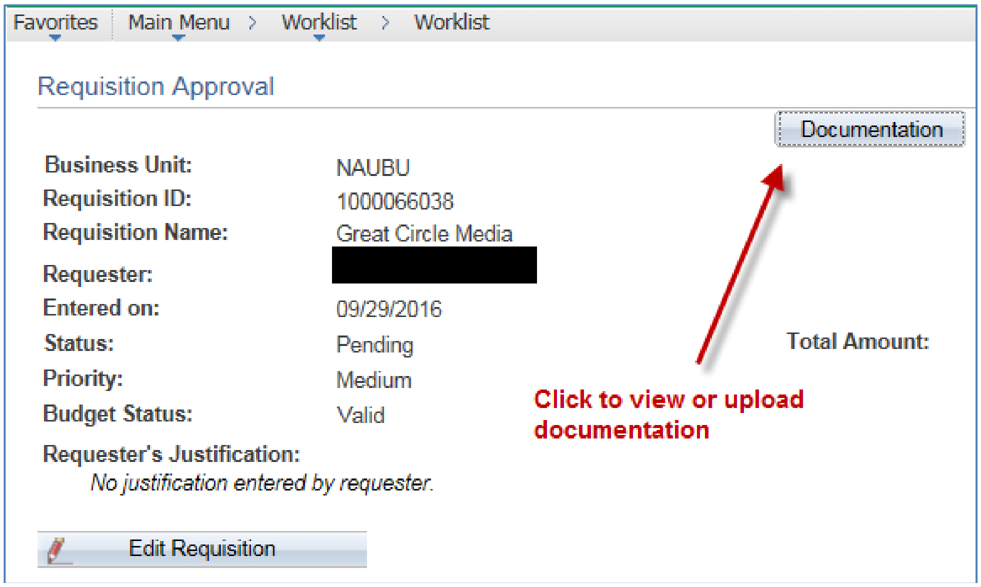
Once you have been assigned a number, follow this process to upload documentation:

1. Navigate to any of the 3 pages (not all users have access to all 3 pages) and click the "Documentation" button. See the screenshots below which show the button on each of the 3 pages.

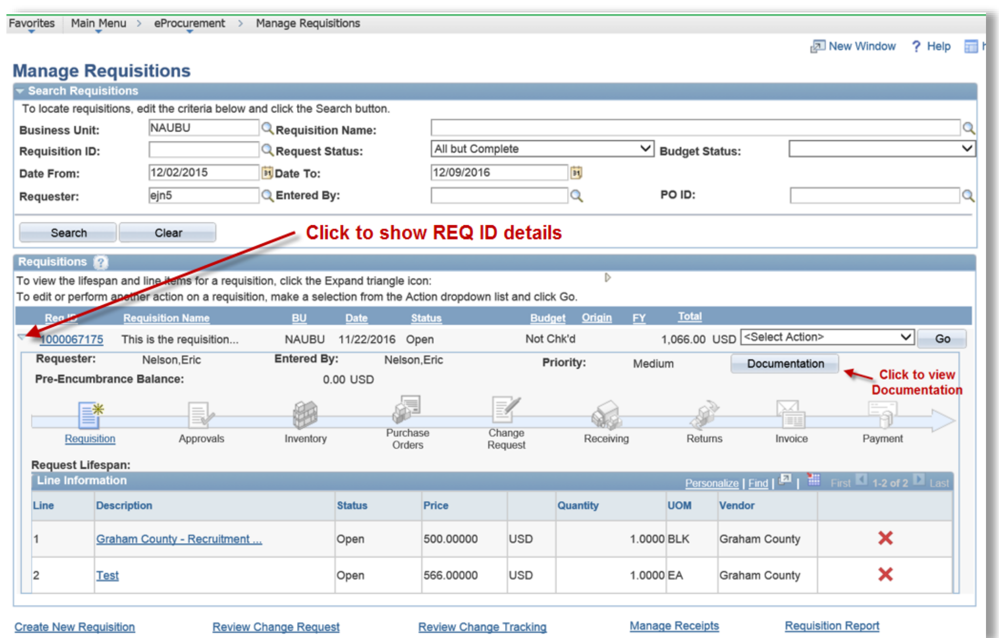
**Requisition Confirmation**



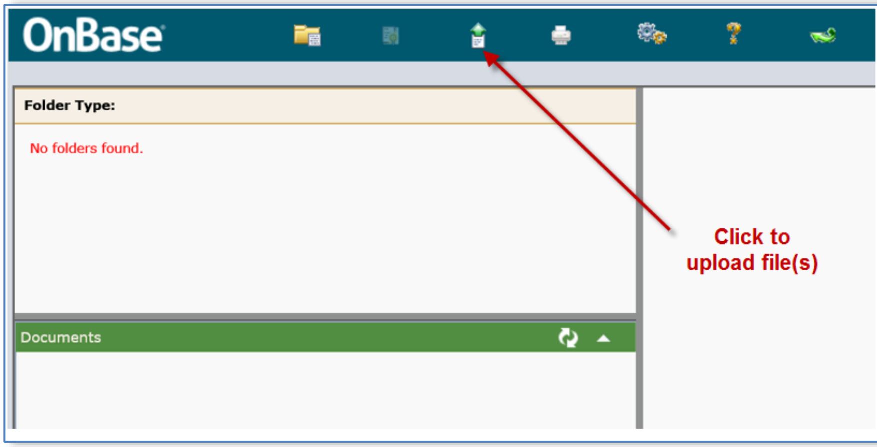
**<u>Requisition Approval</u>**



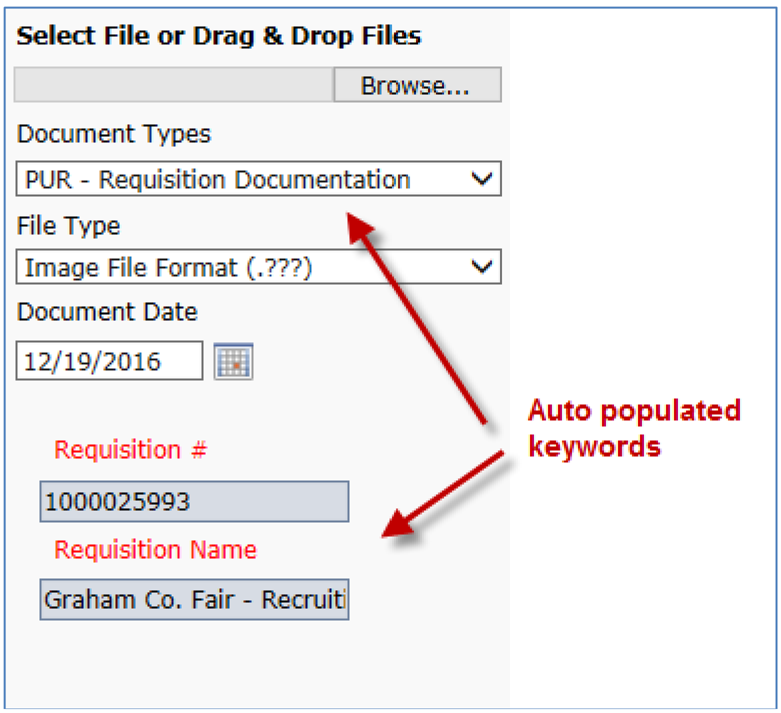

**<u>Manage Requisitions</u>**



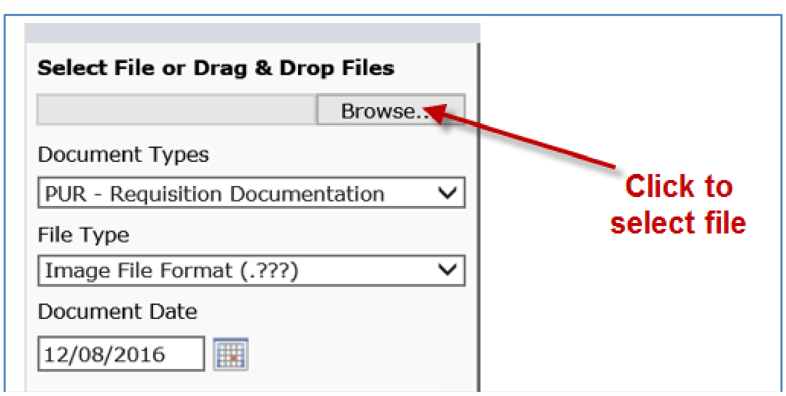

2. You will be taken to the following page. Click the Upload File icon.



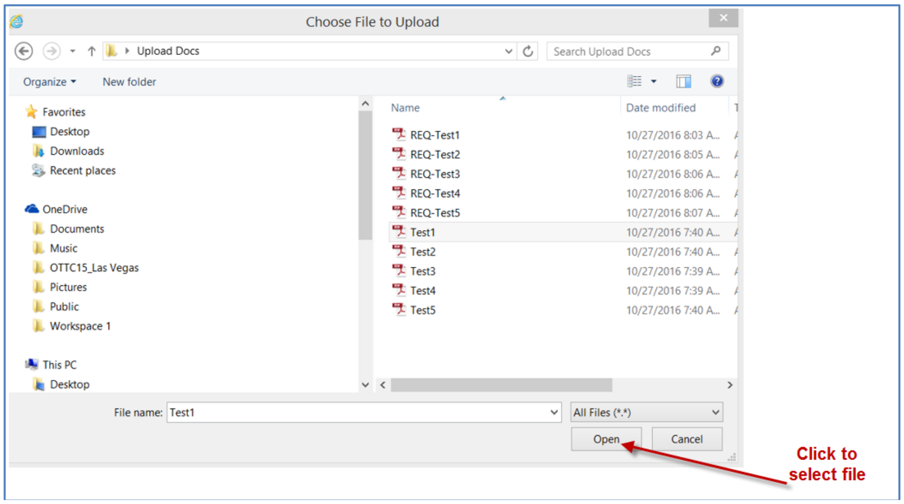

**A.** The required keywords are automatically populated.




**3.** To add files to your upload queue, click Browse to select the file or drag and drop file(s).

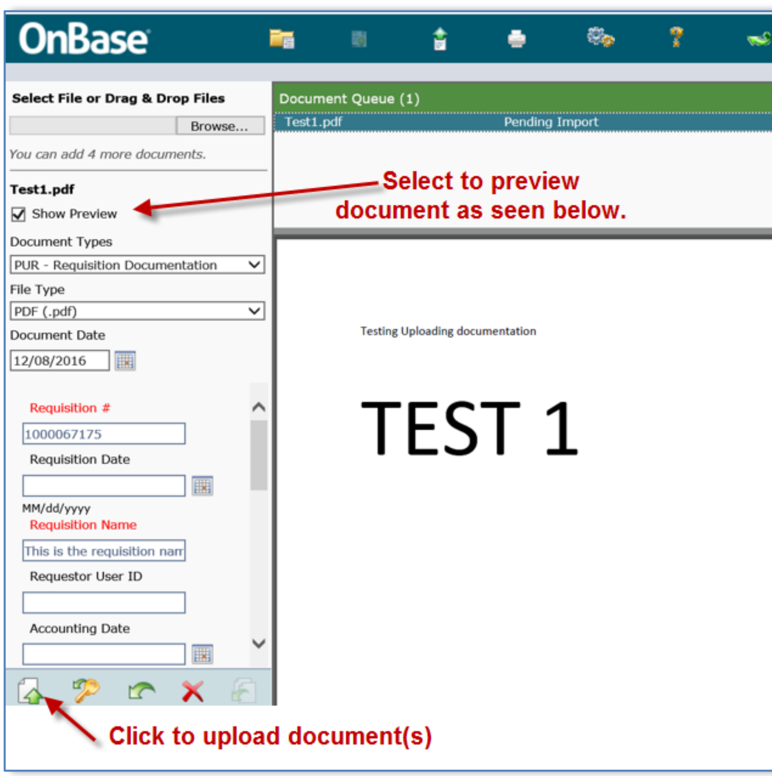


**A.** Navigate to the files to upload and select it. Click Open.

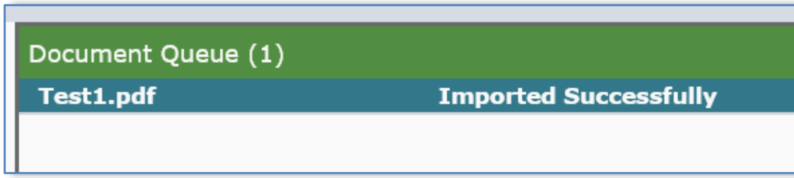



**B.** The file will be put into the Document Queue as a pending import. You can select the Show Preview to see documents. You can queue up to (5) documents at a time.

**4.** After you have queued up the documents to upload for this transaction, select the file you want to upload and click the Import button.



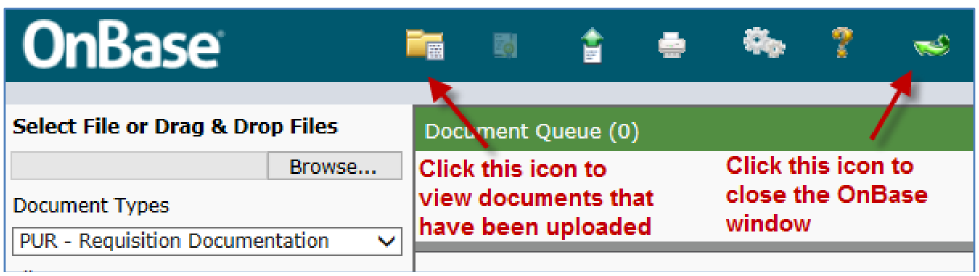

**A.** You will get a message saying "Imported Successfully."




B. Repeat Step 4 for each document in your queue. Each document must be uploaded individually.

5. Once all of your documents have been uploaded, you can:

A. Click the folder icon at the top of the window to view the documents that were uploaded, or
B. Return to PeopleSoft by clicking the green arrow at the top of the window or clicking the x in the upper right. This will close the OnBase window.




## Viewing Uploaded Documentation

You can view the documentation from the same 3 Requisition pages in PeopleSoft that you can upload from (see screenshots above):

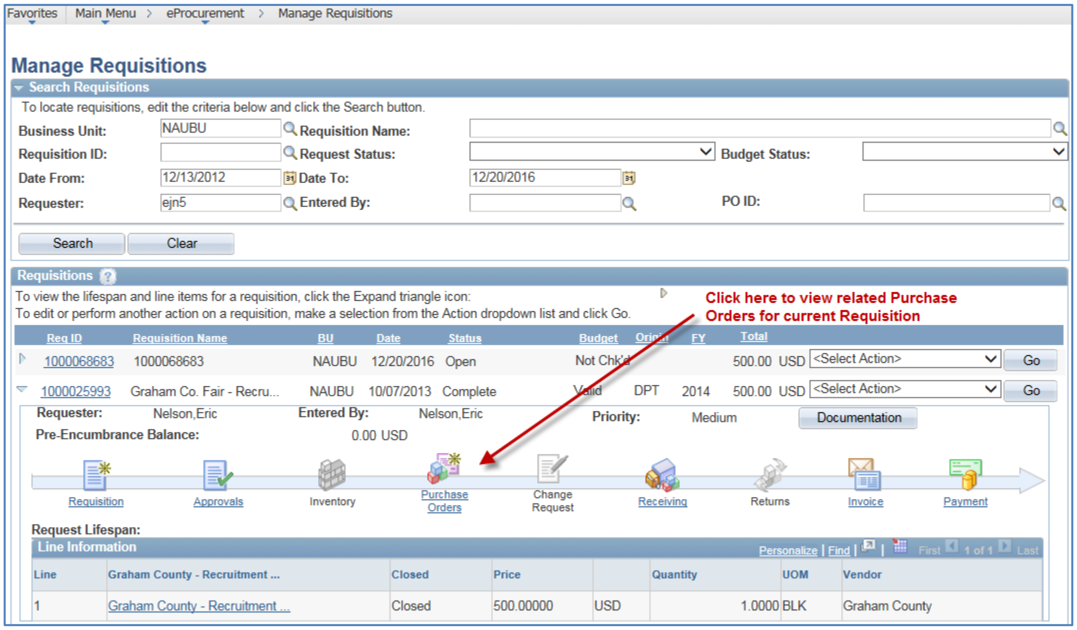
1. Requisition Confirmation
2. Requisitions Approval
3. Manage Requisitions

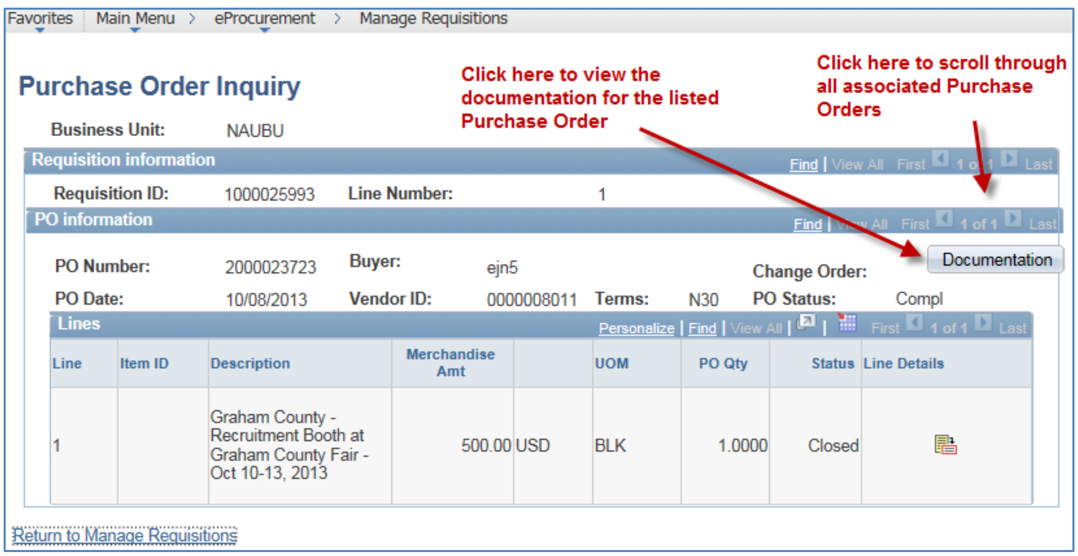
To view the documents, simply click the "Documentation" button on the appropriate page. If documents have been uploaded for that Requisition, they will be displayed in the new Window that pops up.

## Viewing Related (Purchase Order) Documentation

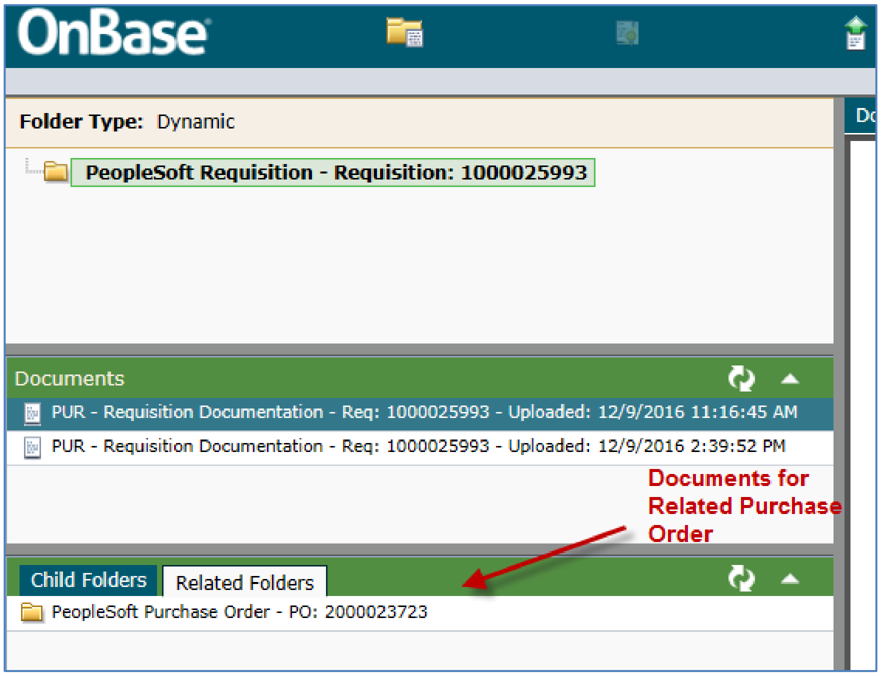
If documents have been uploaded for the Purchase Order related to the Requisition you are looking at, you can view those documents in 2 ways.

1. **Manage Requisitions** – When on the Manage Requisitions screen, you can navigate to the related Purchase Order(s) and see their documents by:
   a. Clicking on the Purchase Order icon
   b. On the next screen that opens, click the "Documentation" button. This will show documents for the Purchase Order listed. There could be multiple Purchase Orders and you can scroll through them to view information/documentation on each one.




2. **Related Folders** – When viewing the documents for the Requisition, there will be a related folder that is visible if documents have been uploaded for the Purchase Order (see below). To view:
    a. From the OnBase screen showing the Requisition documents, right-click on the Purchase Order folder at the bottom left and click “Open in new Window”
    b. A similar window will appear except it will now be showing the Purchase Order documents.




## Deleting/Removing Documentation

At this time, users are unable to delete/remove attachments once they're uploaded to OnBase.

- If the wrong attachment is uploaded for a transaction, contact ASK-FAS@nau.edu to have the attachments removed. You will then need to upload the correct attachments for the transaction.

If you have any questions on this process, please contact ASK-FAS@nau.edu.