UVAFinance



Find Original Requester On Converted PO Quick Reference Guide

Find the Original Requester Overview

This Quick Reference Guide (QRG) is designed to walk **employees** through finding the original requester on a converted purchase order.

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Background Information

For all purchase orders converted from Oracle to Workday, the original requester's name and information was not converted. Many of the notifications for spend transactions in Workday are designed to be sent to the requester.

As a result, notifications have been updated to be sent to the P2P Approver of the cost center present on the purchase order lines. In those cases, the P2P approver may not know who the original requester is and may want to confirm the appropriate action with that requester. This QRG will walk you through how to find the name of the original requester.

Procedure: Find the Original Requester

1. Go to UBI: <u>https://ubi.virginia.edu/ubi-logon-0</u>.

On the UBI Logon Page:

2. Click on UBI QlikView Access Point.

U	BI Logon
UBI	User Hub
	The primary way to access UBI is through the UBI User Hub. The User Hub provides a central place for all modules and apps in UBI as well as basic information on those modules.
	You can access the User Hub here: https://ubihub.admin.virginia.edu
	Guidance on using the User Hub can be found in the UBI Community.
Acc	ess modules and apps through the individual system:
	UBI Reporting
	UBI QlikView Access Point (click to access modules)
	UBI Analytics
	UBI QlikSense Hub (click to access modules)

3. Find the **PO Reporting Application** and open it.

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Last up	dated 2022-07	7-29 01:16
	View detai	ils

On the PO Reporting Application:

4. Click the Requisitions module.

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UBI UNIVERSITY BUSINESS INTELLIGENCE PO Reporting											
	PO Dashbo	ard	Requisitions	PO Distribution	PO Review	PO Receiving	About	MySheet			
Select		PO Filter	'S		Review POs for cor	version to Workday		Count of POs selected:			
Dates	Vendor Name	Ť	0	Convertible		0		2 246 162			
	PO Num	~	0					2,340,102			
Select	Employee Org	*	0								
Award(s) &	Buyer Name	*									
Project(s)	Expenditure Org	*									
	Expenditure Type	-									
Select PO	PO Creation Fiscal Month	-									
Filters	PO Creation Fiscal Year	Ŧ									

- 5. Type the Purchase Order Number in the **PO PurchaseOrders Num** filter.
- 6. Look at the column called **PO Req Distribution Preparer Name**. This is your original requisition requester.

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You have successfully completed this task.