

Find the Original Requester

This Quick Reference Guide (QRG) is designed to walk an end user through finding the original requester on a converted purchase order

Table of Contents

Find the Original Requester Overview 1
 Table of Contents 1
 Background Information..... 1
 Procedure 1

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.

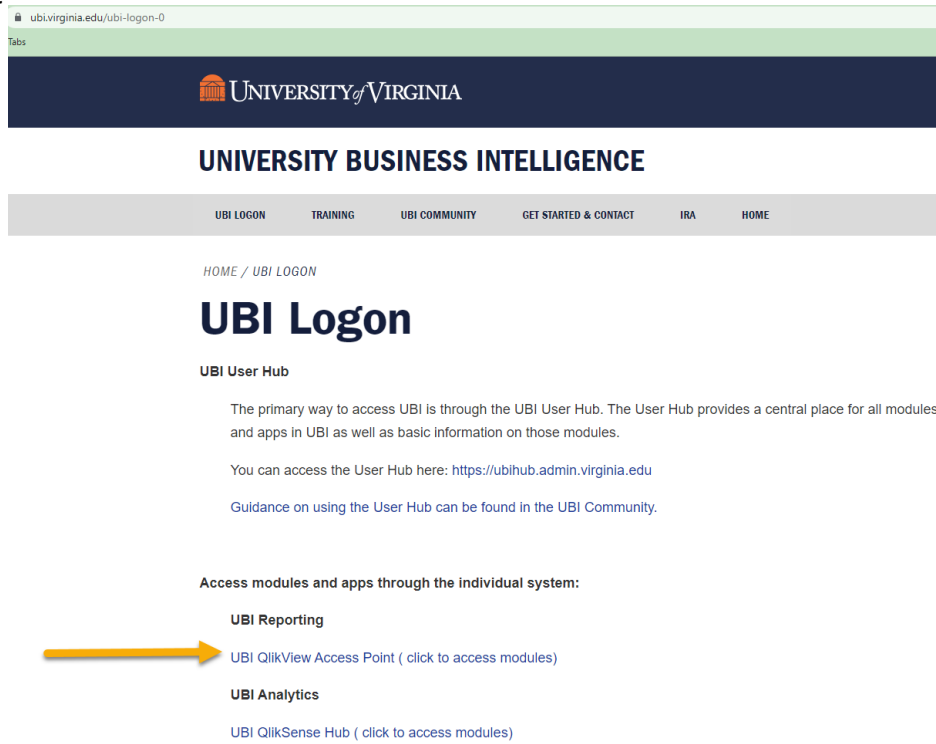
As a result, we have updated the notifications to be sent to the P2P Approver of the cost center present on the purchase order lines. In those cases, the P2P approver may not know who the original requester is and may want to confirm the appropriate action with that requester. This QRG will walk you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

Procedure

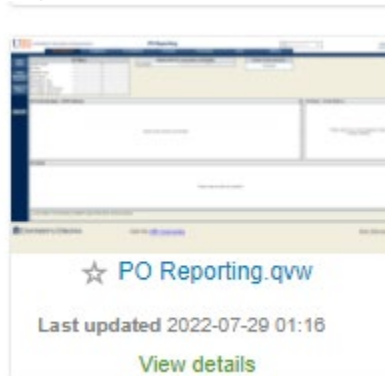
1. Go to UBI: <https://ubi.virginia.edu/ubi-logout>



2. Click on “UBI QlikView Access Point”



3. Find the PO Reporting Application and open it



4. Go to the “Requisitions” module

The screenshot shows the UBI University Business Intelligence interface. The top navigation bar includes 'PO Dashboard', 'Requisitions', 'PO Distribution', 'PO Review', 'PO Receiving', 'About', and 'MySheet'. The 'Requisitions' tab is highlighted. On the left, there are filter options for 'Select Dates', 'Select Award(s) & Project(s)', and 'Select PO Filters'. The main area shows 'PO Filters' and 'Review POs for conversion to Workday' options. A 'Count of POs selected:' box shows 2,346,162. At the bottom, there are sections for 'PO Count by Buyer - All PO statuses' and 'PO Buyer - Email Address'.

5. Type the Purchase Order Number in the “PO PurchaseOrders Num” filter

This screenshot shows the 'Requisition Filters' section. The 'PO PurchaseOrders Num' filter is highlighted in green, and a yellow arrow points to it. The filter value is '1985545'. Other filters include 'Requisition Num' (1471341), 'PO Distr MBU Project Own Org N...', 'PO Distr Project Own Org Name', 'Expenditure Type', and 'Preparer Name'. There are buttons for 'Multiple Requisitions' and 'Single Requisition'. Below the filters is a table of requisitions.

Requisition Num	PO Purchase Orders Num	PO Req Line Num	ASuggested Vendor Name	PO Account\$Or ganization	PO Req Distribution Expenditure Type	PO Req Distribution Item Description	PO Req Project Num	PO Req Task Num	PO Req Award Num	Justific ation	Note To Buyer	PO Requisitions Authorization Status	Requisition Creation Dt	RQLIN\$R eference Num	PO Req Distribution Preparer Name	Distr Quantity	Unit Price	Amou
1471341	1985545	1	B & H PHOTO-VIDEO-PRO A...	12195	Eq NonCapital Photographic	DJMAVICP D11 Mavic Pro	120997	101	SG00078	-	approv ed by...	APPROVED	4/27/2018	-	Pritchard, Laura D	1.000	999.00	999.00
		2	B & H PHOTO-VIDEO-PRO A...	12195	Eq NonCapital Photographic	RUVSY135B Ruqard Camer...	120997	101	SG00078	-	approv ed by...	APPROVED	4/27/2018	-	Pritchard, Laura D	1.000	17.95	17.95
		3	B & H PHOTO-VIDEO-PRO A...	12195	Eq NonCapital Photographic	PAWVPWPK Battery/Charge...	120997	101	SG00078	-	approv ed by...	APPROVED	4/27/2018	-	Pritchard, Laura D	1.000	97.99	97.99
		4	B & H PHOTO-VIDEO-PRO A...	12195	Eq NonCapital Photographic	SAEPS032GV3G Sandisk 32gb ...	120997	101	SG00078	-	approv ed by...	APPROVED	4/27/2018	-	Pritchard, Laura D	2.000	21.40	42.80
		5	B & H PHOTO-VIDEO-PRO A...	12195	Eq NonCapital Photographic	PAHCV770K Panasonic HC-V...	120997	101	SG00078	-	approv ed by...	APPROVED	4/27/2018	-	Pritchard, Laura D	1.000	497.99	497.99

6. Look at the column called “PO Req Distribution Preparer Name”. This is your original requisition requester.

This screenshot is identical to the previous one, but a yellow box highlights the 'PO Req Distribution Preparer Name' column in the table, showing the value 'Pritchard, Laura D' for all rows.