

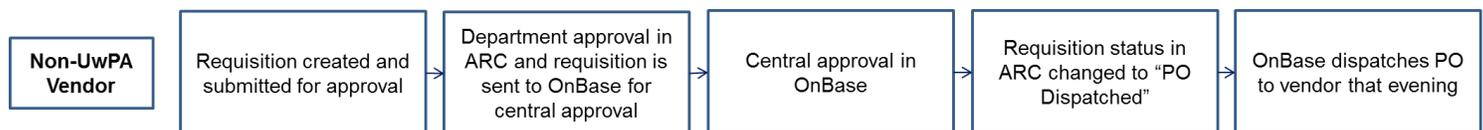
Monitoring the Dispatch Status of a Purchase Order

Requisitions approved in ARC and OnBase become purchase orders. To become a purchase order, all requisitions require documentation and appropriate approval(s) (which may include Departmental, Prior, and Central). Users should monitor the progress of a purchase order's life cycle in both ARC and OnBase. The PO dispatch process will vary slightly depending on whether a requisition is for a non-UwPA or UwPA vendor.

Non-UwPA Vendors

Purchase orders for Non-UwPA vendors are created immediately upon central Purchasing's approval of the requisition in OnBase and reflected in the requisition's status in ARC. Because OnBase's process of dispatching purchase orders to vendors is run each night, please note that purchase orders will be sent to vendors the evening after the requisition status has been changed to "PO Dispatched" in ARC (there is a small delay between the status change and the actual dispatch of the purchase order to the vendor). The directions that follow will teach you how to monitor Central Purchasing's approval status in OnBase as well as how to confirm that a purchase order has been sent to a vendor.

The PO dispatch process for a Non-UwPA vendor is as follows:



UwPA Vendors

The process for UwPA vendors varies slightly from that of non-UwPA vendors, as central Purchasing approval is not required on requisitions for UwPA vendors. As there is no central approver to verify that all required documentation has been submitted, the purchase order will not be dispatched from OnBase until OnBase recognizes that all required documentation for the requisition has been uploaded. The list of required documentation will vary based on the category, amount, and sole source option for the requisition, but OnBase will provide a list of documents needed in the "Core Documents" section of the page.

The PO dispatch process for UwPA vendors is as follows:



Because the "PO Dispatched" status in ARC does not reflect whether or not the purchase order has been dispatched to the vendor, you will need to monitor the status of the dispatch in OnBase. In addition, OnBase will provide the list of required documents for the requisition that you will need to upload into OnBase.

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Follow these steps to monitor the status of the dispatch in OnBase:

1. In ARC, navigate to the Manage Requisitions page (Main Menu > eProcurement > Manage Requisitions), enter the requisition ID, and click "Search".
2. Click the arrow next to the requisition link to expand the requisition details and click the requisition icon link.

The screenshot shows the ARC interface for a requisition. At the top, a table lists requisition details: Req ID 0000000994, Requisition Name 0000000994, BU COLUM, Date 07/25/2012, Status Pending, Budget Not Chk'd, and Total 1,710.16 USD. Below this, a flowchart shows the requisition process: Requisition (highlighted with a red box), Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. A 'Request Lifespan' section is also visible.

Line	Description	Status	Price	Quantity	UOM	Vendor
1	office furniture jg913	Pending Approval	1,710.16000 USD	1.0000	EA	EMPIRE OFF INC

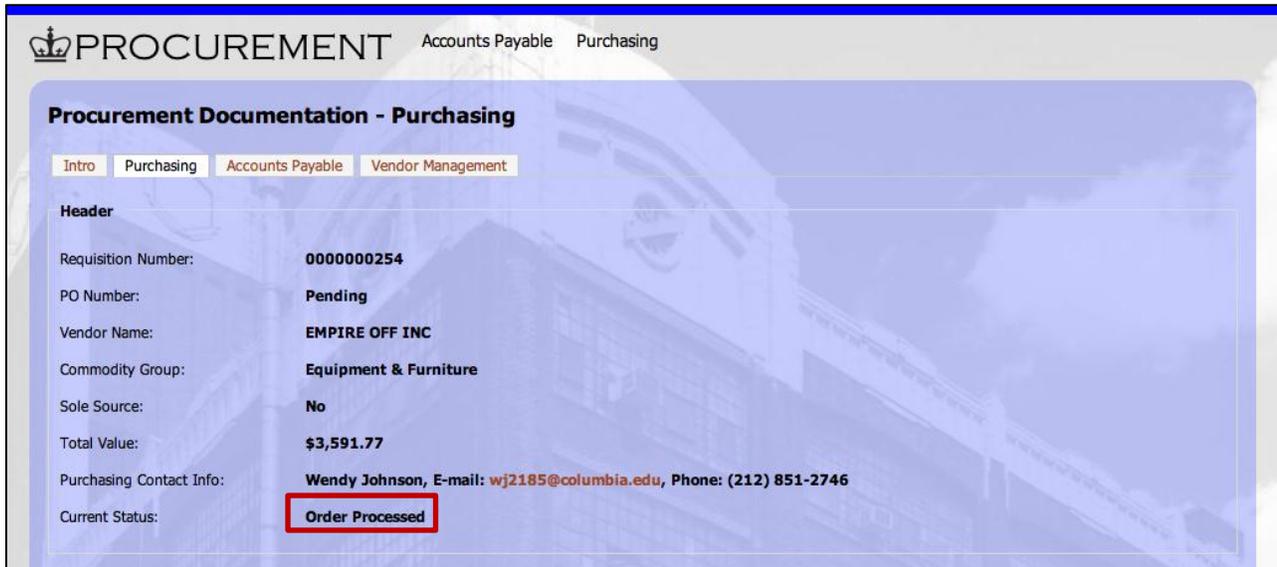
3. Click the Procurement EDM button to access the EDM website.

The screenshot shows the 'Requisition Details' page. It features a table with requisition information and a table with line items. At the bottom, there are three buttons: 'Edit Requisition', 'View Documents', and 'Procurement EDM' (highlighted with a red box). There are also two links: 'Return to Manage Requisitions' and 'Requisition Schedule and Distribution'.

Requisition Name	Requisition ID	Unit	Date	Status	Total
0000000994	0000000994	COLUM	07/25/2012	Pending	1,710.16

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	office furniture jg913	Not Source	N	1.0000 Each	1,710.16000 USD	Pending	1,710.16

- The “Current Status” field will display the dispatch status of the purchase order in OnBase. When a purchase order has been sent to a vendor, the status will say “Order Processed”.



PROCUREMENT Accounts Payable Purchasing

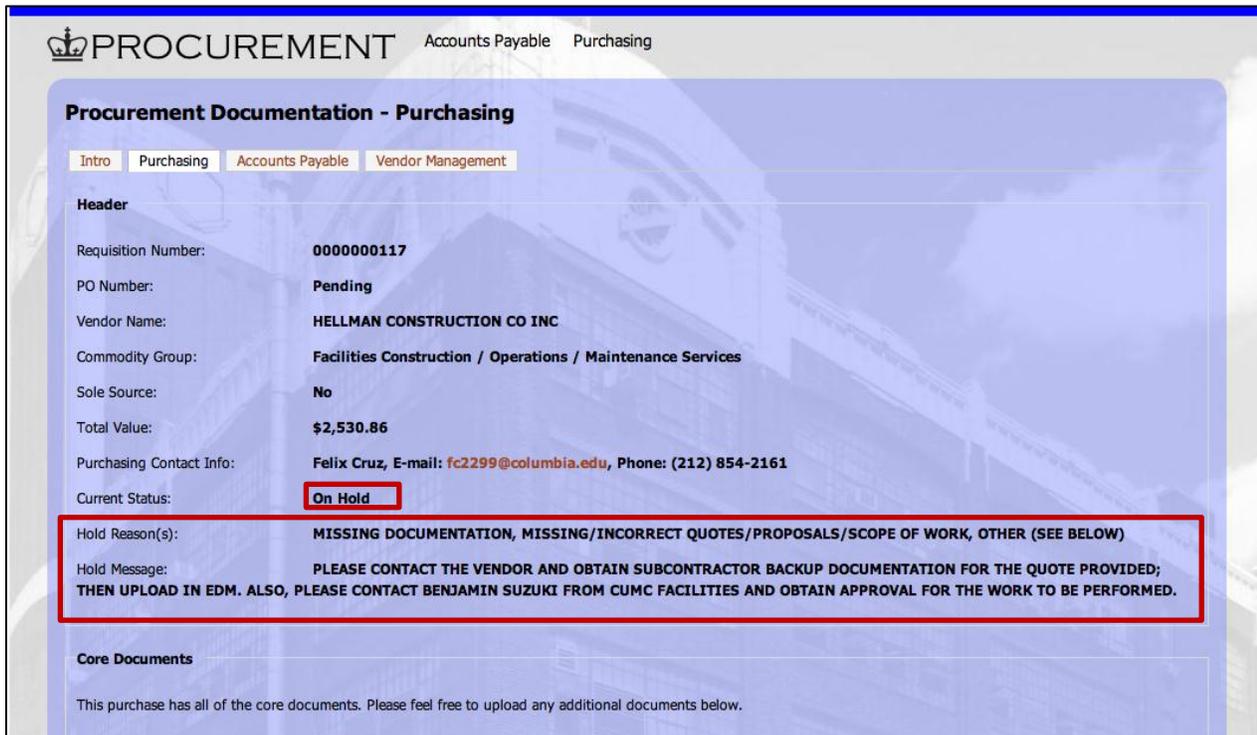
Procurement Documentation - Purchasing

Intro Purchasing Accounts Payable Vendor Management

Header

Requisition Number:	000000254
PO Number:	Pending
Vendor Name:	EMPIRE OFF INC
Commodity Group:	Equipment & Furniture
Sole Source:	No
Total Value:	\$3,591.77
Purchasing Contact Info:	Wendy Johnson, E-mail: wj2185@columbia.edu, Phone: (212) 851-2746
Current Status:	Order Processed

- For non-UwPA requisitions, you can also check the central Purchasing approval status in OnBase. If the requisition has been put on hold by a central approver, the status will be “On Hold”. There will also be a hold reason displayed so the initiator knows what additional action is necessary.



PROCUREMENT Accounts Payable Purchasing

Procurement Documentation - Purchasing

Intro Purchasing Accounts Payable Vendor Management

Header

Requisition Number: **000000117**
PO Number: **Pending**
Vendor Name: **HELLMAN CONSTRUCTION CO INC**
Commodity Group: **Facilities Construction / Operations / Maintenance Services**
Sole Source: **No**
Total Value: **\$2,530.86**
Purchasing Contact Info: **Felix Cruz, E-mail: fc2299@columbia.edu, Phone: (212) 854-2161**
Current Status: **On Hold**

Hold Reason(s): **MISSING DOCUMENTATION, MISSING/INCORRECT QUOTES/PROPOSALS/SCOPE OF WORK, OTHER (SEE BELOW)**
Hold Message: **PLEASE CONTACT THE VENDOR AND OBTAIN SUBCONTRACTOR BACKUP DOCUMENTATION FOR THE QUOTE PROVIDED; THEN UPLOAD IN EDM. ALSO, PLEASE CONTACT BENJAMIN SUZUKI FROM CUMC FACILITIES AND OBTAIN APPROVAL FOR THE WORK TO BE PERFORMED.**

Core Documents

This purchase has all of the core documents. Please feel free to upload any additional documents below.

6. Finally, for requisitions for UwPA vendors, if the requisition is missing documentation, the status will be "Awaiting Documents". The "Core Documents" section of the page will outline what additional documents need to be uploaded into OnBase before the requisition can be processed. Please note: core documents are required for any requisition, not just UwPA requisitions.

PROCUREMENT Accounts Payable Purchasing

Procurement Documentation - Purchasing

[Intro](#) [Purchasing](#) [Accounts Payable](#) [Vendor Management](#)

Header

Requisition Number: **000000989**
PO Number: **Pending**
Vendor Name: **UNIPOWER**
Commodity Group: **Service Provider/consultant**
Sole Source: **No**
Total Value: **\$2,115.68**
Purchasing Contact Info: **Luca Barbera, E-mail: lb2746@columbia.edu, Phone: (212) 854-3664**
Current Status: **Awaiting Documents/DAF**

Core Documents

Please see the list of Core Documents below that are still needed before we can process this order.

Document Name	Number Remaining
Scope of Work	1