



Toolbox: Reviewing User Submitted Forms



Once a user has submitted a form for you as an ISP, each person in your area listed as a reviewer will receive an email notification to review the form and add any additional required information such as pricing.

This process is completed by whoever is the first to open their email and take action on the form.

NOTE: You must log in to Deacon Depot to review the form and add pricing. Scroll all the way to the bottom of the email and click the link in the Additional Information section. This will open the My Approvals screen in Deacon Depot.

Open the appropriate Reviewer folder and click the 'Assign' button to the right of the PR you wish to review. This assigns the PR to you and lets other reviewers know that you are taking action on it.

New Pending Approval for Requisition# 1240956

DeaconDepot_UIT@wfu.edu 11:18 AM (3 minutes ago)

ISP: Benson Center Reviewer Approval Request for Requisition# 1240956

Dear Taylor Requisitioner,

The requisition listed below has been submitted for your approval. The business purpose on the requisition is a statement on how a good or service is going to be used or how it benefits the University and is required by the IRS. When the purpose is implicit by the nature of the good, it is not necessary to enter a purpose on the requisition (e.g. stapler, pens, pencils, etc). If a good can be used both personally or for business, a business purpose is required.

Summary

Folder: ISP: Benson Center Reviewer
 Prepared by: Ruby Requisitioner
 Cart Name: Finance Systems Shuttle & Van Rental
 Requisition No.: 1240956
 Priority: Normal
 No. of line items: 1

TOTAL: 0.00 USD

Details

ISP: University Union - Campus Life Vans

Campus Life Vans
 Form Type: ISP Request

Item 1

Description: Campus Life Vans
 Catalog Number: 1
 Quantity: 1
 Unit Price: 0.00 USD
 Ext. Price: 0.00 USD
 Size/Packaging: 99999999
 Commodity Code: 99999999
 Business Purpose:
 Department Reference Number:
FORM TOTAL: 0.00 USD

TOTAL: 0.00 USD

Accounting Codes

Fund: 111111 - Unrestricted 14.1
 Department: 112303 - Finance Systems - upgra
 Account: 53010 - Supplies
 Activity:
 Location:
 Chart: R - WFU Reynolds Campus
 Program: 40 - Institutional Support

Additional Information

Summary Details
 Comments: (1)

Shipping Address
 Contact Name: Ruby Requisitioner, Room 1501
 Phone: +1 (336) 758-8289
 Email: rrogers@wfu.edu
 WFU-Finance & Business Services
 1100 Reynolds Blvd
 UCC
 Winston Salem, NC 27105
 United States

[Click here to view the document in your organization's site.](#)

If you have any questions with regard to reviewing/approving this requisition, please contact the Deacon Depot Support Team.

Support Team Contact Information:
 +1 (336) 758-8289
 dcndepot@wfu.edu

Thank you,
 Deacon Depot

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1241746	ISP: University Union - Campus Life Vans	Not Assigned	10/31/2014 11:52 AM	Ruby Requisitioner	0.00 USD	Assign
Requisition Name: Trip to Tanglewood No. of line items: 1 Folders: 0 Days in folder [ISP: Benson Center Reviewer]						
1240956	ISP: University Union - Campus Life Vans	Not Assigned	10/31/2014 11:17 AM	Ruby Requisitioner	0.00 USD	Assign
Requisition Name: Finance Systems Shuttle & Van Rental No. of line items: 1 Folders: 0 Days in folder [ISP: Benson Center Reviewer]						
1240895	ISP: University Union - Campus Life Vans	Not Assigned	10/30/2014 9:16 AM	Linda Nichols	0.00 USD	Assign
Requisition Name: 2014-10-30 nichold 01 No. of line items: 1 Folders: 1 Days in folder [ISP: Benson Center Reviewer]						

Once the PR has been assigned to you, it will display in the folder titled 'My PR Approvals'.

To review the form and add any necessary information such as pricing, click the PR number.

Total Results Found: 7 **All Dates** Assign Go

Sort by: Submit date newest first ?

Hide requisition details expand all collapse all Results per folder: 20

My PR Approvals

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1241746	ISP: University Union - Campus Life Vans	Taylor Requisitioner	10/31/2014 11:52 AM	Ruby Requisitioner	0.00 USD	Approve

Requisition Name: Trip to Tanglewood
No. of line items: 1

0 Days in folder [My PR Approvals]
0 Days in folder [ISP: Benson Center Reviewer]

The PR Information will display. Scroll down to the 'Supplier / Line Item Details' section and click the form title to open it.

Supplier / Line Item Details

For selected line items: Reject Selected Items Go

ISP: University Union - Campus Life Vans more info...

Contract: no value
PO Number: To Be Assigned
View/edit by line item...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Campus Life Vans			0.00	1	0.00 USD

Commodity Code: 99999999
ISP: Internal Service Provider - WFU
Business Purpose: no value
Department Reference Number: no value

Internal Note: no note
Internal Attachments: Add Attachments
External Note: no note
Attachments for supplier: Add Attachments

Supplier subtotal: 0.00
Tax1: 0.00
Tax2: 0.00
Shipping: 0.00
Handling: 0.00
Supplier total: 0.00USD

The form information as completed by the user will display. Scroll to the section for your departmental use and enter any necessary information. Be sure to enter a product description. This description will display on the completed PO that you receive after the PR has completed the approval process. Additionally, this field feeds to Banner for reporting purposes.

NOTE: If you have a price field, do not use a \$.

Benson Center Use Only

Total Cost of Rental (\$ sign not needed): 35.00

Product Description

Van rental for Finance Systems to travel to Tanglewood Park.
194 characters remaining expand | clear

Additional Information regarding request:

1000 characters remaining expand | clear

Supplier: ISP: University Union - Campus Life Vans
Fulfillment Address: OR Ordering (Finance Only) 1: Benson University Center Room 335 Winston Salem, NC 27109 US
Commodity Code: 99999999

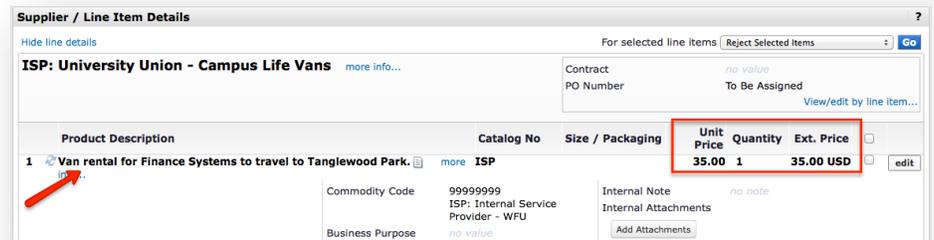
Total: 0.00

Once all necessary information has been entered, scroll to the top of the form, select 'Save' from the Available Actions drop-down, and click 'Go'. You can print the form from this screen if you wish, using the printer icon in the top right corner.

Once you receive the 'Success' notification, click 'Close'.



The PR Line Item Details will be updated with the information you entered.



You will now approve the PR to move it to the next step in the approval workflow. To approve, scroll to the top of the screen and select one of the 'Approve / Complete Step' options from the Available Actions drop-down. Click 'Go'. The PR will now route to the next step of the approval process and you will be returned to the 'My Approvals' screen.

Once the PR routes through all steps of the approval workflow, the Purchase Order will be created and sent to you for fulfillment.

