

Submitting & Tracking Payment Requests Using the Find Feature

The Find feature gives users the ability to retrieve previously entered payment requests that have been generated in the new form. Users will also utilize this feature in order to copy, cancel or reassign a payment request that was previously entered. The procedures listed below will illustrate using the Find feature. **Please note that users may only retrieve information about payment requests that they have submitted.**

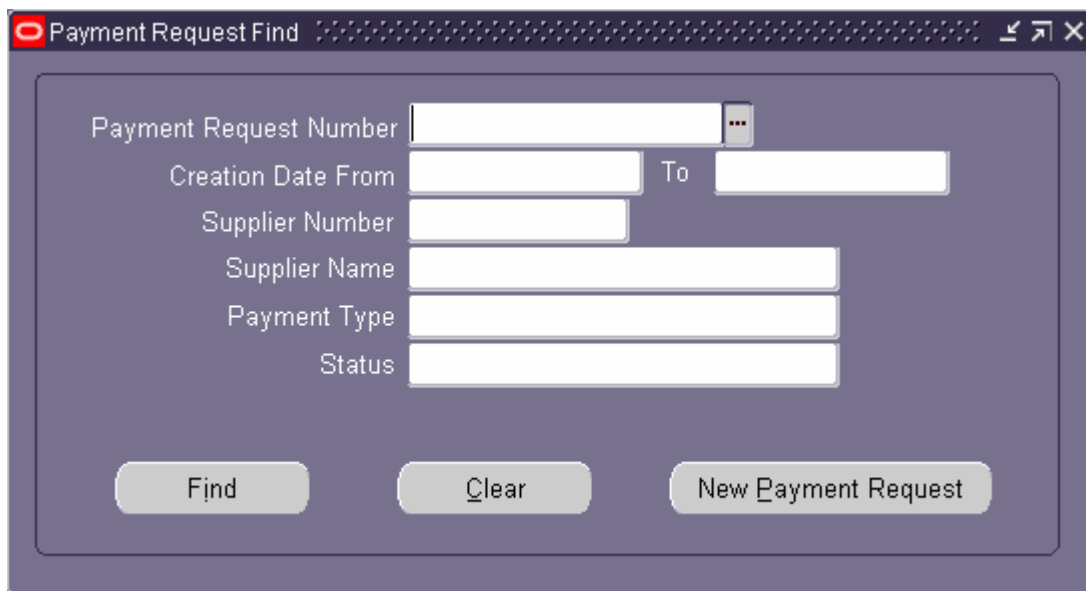
UAB FN Document Entry/Approval → Payment Request
UAB Requisition Input → Payment Request

Accessing the Find Feature:

1. To access the **FIND** feature, click on the **FIND** icon (flashlight) on the toolbar.



2. The **PAYMENT REQUEST FIND** form will appear. This form will allow you to retrieve individual payment requests by payment request number, as well as retrieving a subset listing of payment requests that you as the requestor has entered based on selected search criteria.

A screenshot of a window titled 'Payment Request Find'. The window has a dark blue header bar with a red close button on the left and standard window controls on the right. The main area is a light blue form with the following fields:

- Payment Request Number: A text input field with a dropdown arrow on the right.
- Creation Date From: A text input field.
- To: A text input field.
- Supplier Number: A text input field.
- Supplier Name: A text input field.
- Payment Type: A text input field.
- Status: A text input field.

At the bottom of the form are three buttons: 'Find', 'Clear', and 'New Payment Request'.

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Using the Find Feature to View a Complete Listing of Created Payment Requests/Retrieving Payment Requests to Copy, Cancel or Reassign:

1. Click on the **PAYMENT REQUEST NUMBER LOV** to view a listing of your previously entered payment requests **in the new form**.

Payment Request Find

Payment Request Number

Creation Date From To

Supplier Number

Supplier Name

Payment Type

Status

Find Clear New Payment Request

2. After clicking on the **PAYMENT REQUEST NUMBER LOV**, the system will provide a **FIND** form. Information about your payment requests (Payment Request Number, Vendor Name, Payment Type, Creation Date & Status) is listed.

Find %

Payment Request Number	Vendor Name	Payment type	Creation Date	Status
5000208	UPS	OTHER_SHIPPING	28-DEC-2006	INCOMPLETE
5000207	UPS	OTHER_SHIPPING	28-DEC-2006	INCOMPLETE
5000206	UPS	OTHER_SHIPPING	28-DEC-2006	INCOMPLETE
5000205	FOUAD H FOUAD (1021766)	CONTRACTOR_TRAVEL	28-DEC-2006	CANCELLED
5000204	UPS	OTHER_SHIPPING	28-DEC-2006	CANCELLED
5000201	AMER SOC OF CIVL ENGINEERS	MEMBERSHIP_FEES	28-DEC-2006	INCOMPLETE
5000192	FORBES DISTRIBUTING CO INC	SUPPLIES	19-DEC-2006	CANCELLED
5000191	UPS	OTHER_SHIPPING	19-DEC-2006	IN-PROCESS
5000190	UPS	OTHER_SHIPPING	19-DEC-2006	IN-PROCESS
5000189	UPS	OTHER_SHIPPING	19-DEC-2006	CANCELLED
5000188	UPS	OTHER_SHIPPING	19-DEC-2006	CANCELLED
5000187	UPS	OTHER_SHIPPING	19-DEC-2006	CANCELLED
5000147	ALLISON L FULTON	SCHOLARSHIPS_FELLOWS	15-DEC-2006	CANCELLED
5000130	UPS	SUPPLIES	13-DEC-2006	CANCELLED
5000128	UPS	OTHER_SHIPPING	13-DEC-2006	IN-PROCESS
5000127	LANEITRIA D HEAD-01	CONTRACTOR_TRAVEL	13-DEC-2006	CANCELLED

Find OK Cancel

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3. If you would like to either copy, cancel or reassign a payment request, highlight the desired payment request and click on **OK**.
4. The system lists the selected payment request number. Click on the **FIND** button to retrieve the payment request.

Payment Request Find

Payment Request Number: 5000201

Creation Date From: [] To: []

Supplier Number: []

Supplier Name: []

Payment Type: []

Status: []

Buttons: Find, Clear, New Payment Request

5. The payment request that is to be copied, cancelled or reassigned will appear as shown below.

Payment Request

Payment Request Number: 5000201

Payment Type: MEMBERSHIP FEES

Supplier Number: 153022

Supplier Name: AMER SOC OF CIVIL ENGINEERS

Supplier Site: A-BALTIMORE

Call Extension: []

Requestor: Head, Laneitria D

Status: INCOMPLETE

Submit Date: []

Wire Payment:

Documentation:

Total Amount: 250.00

Buttons: Submit, Copy, Cancel, Add Documentation, Barcode, Reassign, Logg

Invoice Line Number	Invoice Number	Invoice Date	Invoice Amount	Distribution Total
1	asce5	12-DEC-2006	250.00	250.00

Buttons: Distribution, View All Distributions, Apply Distribution to all invoices

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Retrieving a Subset Listing of Payment Requests Based Upon User-Specified Search Criteria:

1. Enter the desired search criteria into the **PAYMENT REQUEST FIND** form, as shown below. Please note that these fields (**CREATION DATE FROM, TO, SUPPLIER NUMBER, SUPPLIER NAME, PAYMENT TYPE** and **STATUS**) may be used in conjunction with one another. For example, if you would like to see a subset listing of the payment requests that you have created to UPS during the month of December 2006, enter the supplier information by either the supplier number or name, and enter the date range in the **CREATION DATE FROM AND TO** fields, as shown below.

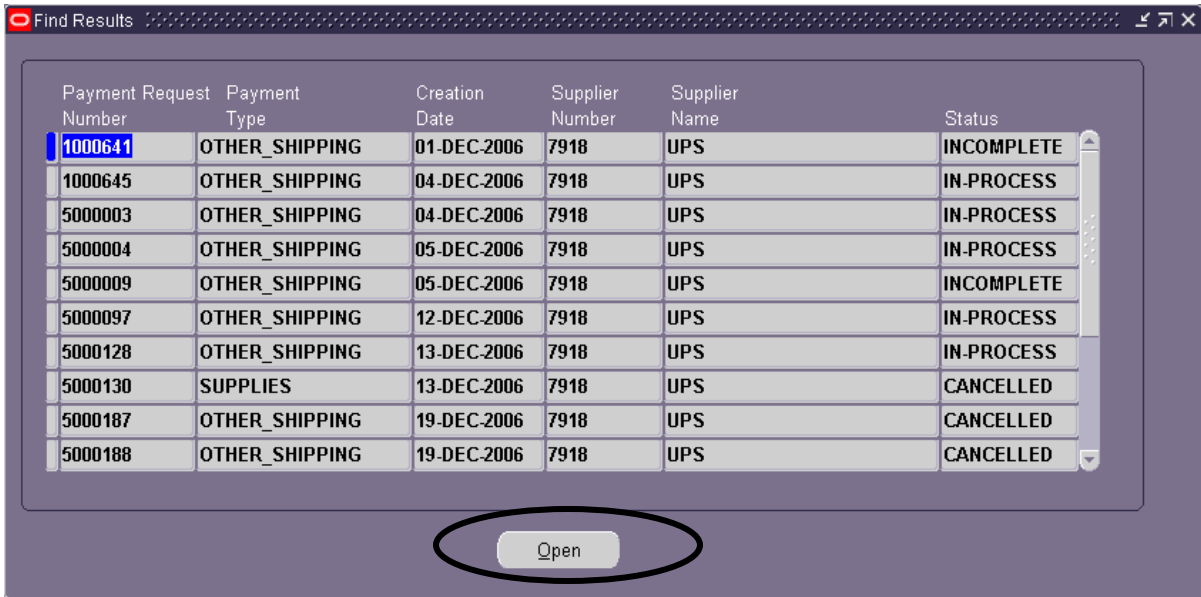
The screenshot shows a web application window titled "Payment Request Find". The window contains a form with the following fields and values:

- Payment Request Number: [Empty]
- Creation Date From: 01-DEC-2006 To: 31-DEC-2006
- Supplier Number: 7918
- Supplier Name: UPS
- Payment Type: [Empty]
- Status: [Empty]

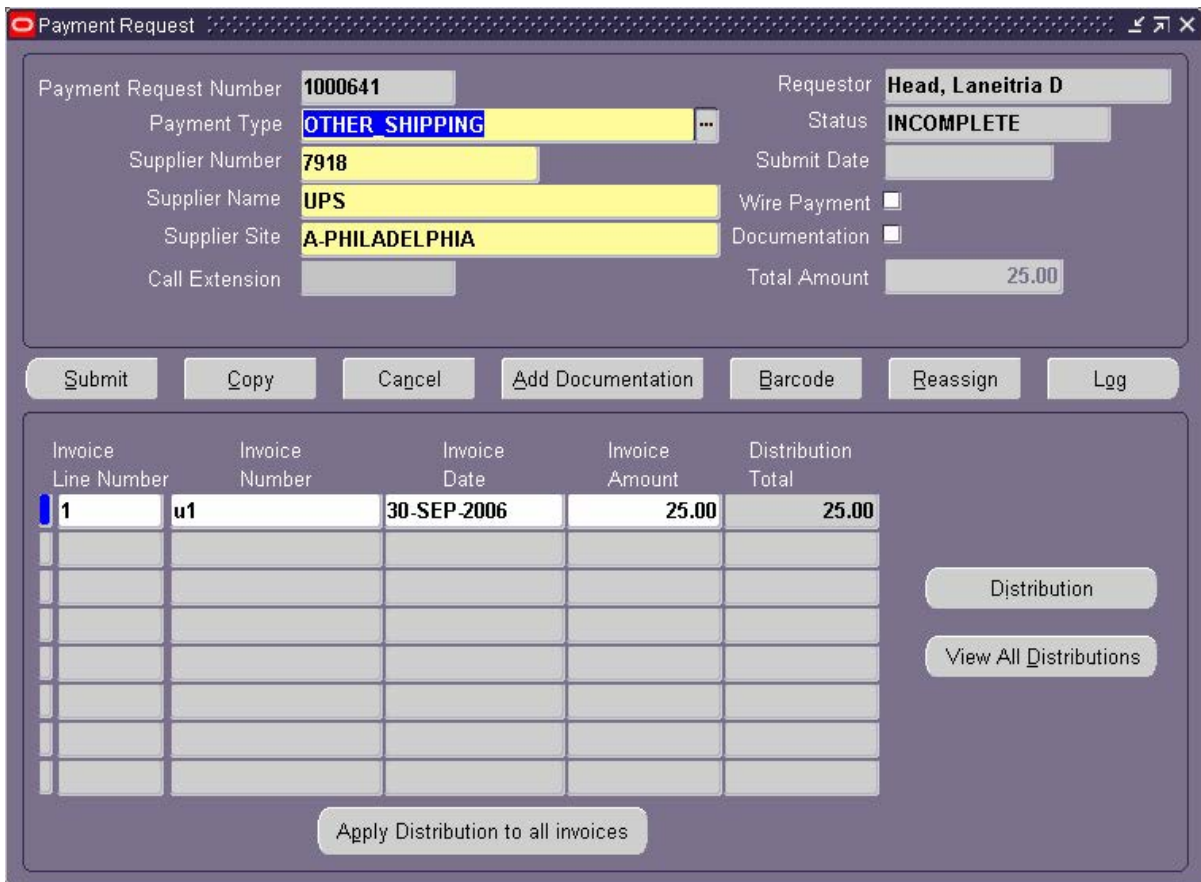
At the bottom of the form, there are three buttons: "Find", "Clear", and "New Payment Request". A black arrow points to the "Find" button.

2. Click on the **FIND** button.
3. After clicking on the **FIND** button, the **FIND RESULTS** form will appear, as shown on the following page. At this point, users may scroll through the list to view their search results. To retrieve a payment request for viewing information, copying, cancelling or reassigning, select the desired payment request by clicking next in the **PAYMENT REQUEST NUMBER** field and click on the **OPEN** button.

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4. The system has now retrieved the selected payment request. You may now view, copy, cancel or reassign the payment request.

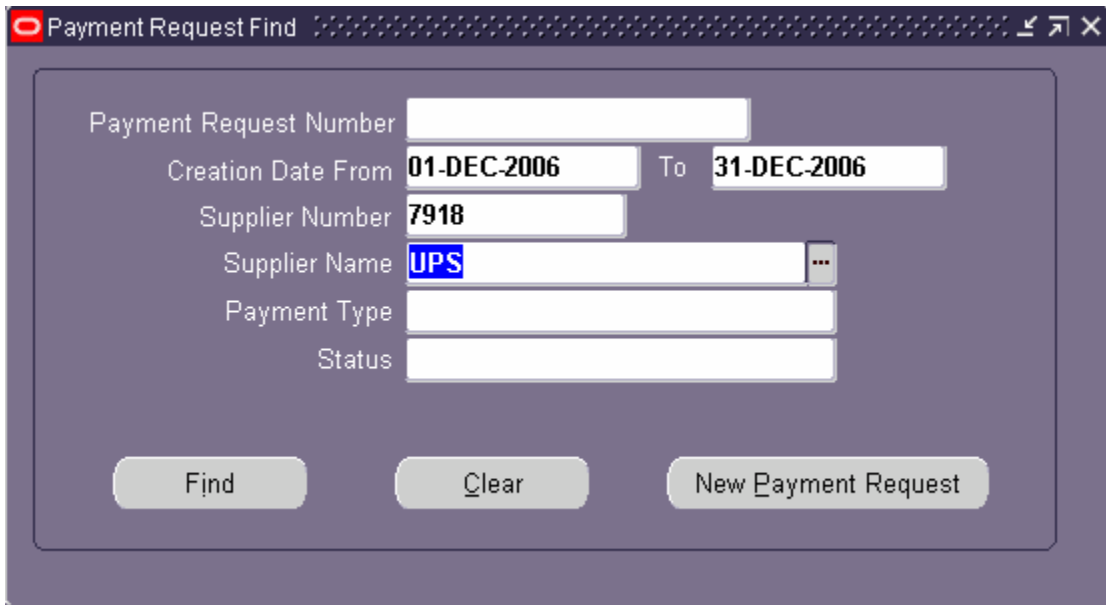


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5. To go back to your search results, do the following:
 - a. Click on the **FIND** icon (flashlight) on the toolbar.



- b. The **PAYMENT REQUEST FIND** form should still have your previous search criteria listed. Click on the **FIND** button.

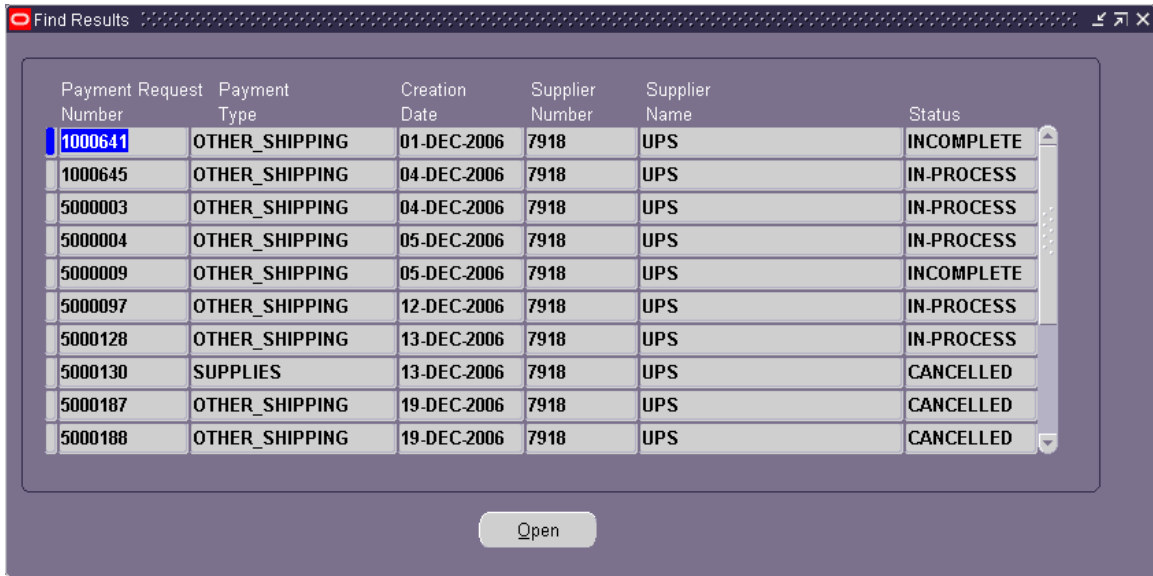
A screenshot of a 'Payment Request Find' dialog box. The form contains the following fields:

- Payment Request Number: [Empty text box]
- Creation Date From: 01-DEC-2006 To: 31-DEC-2006
- Supplier Number: 7918
- Supplier Name: UPS (with a dropdown arrow)
- Payment Type: [Empty text box]
- Status: [Empty text box]

At the bottom of the form are three buttons: 'Find', 'Clear', and 'New Payment Request'.

- c. Your previous listing is now shown. You may now select another payment request from this list, if desired.

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Payment Request Number	Payment Type	Creation Date	Supplier Number	Supplier Name	Status
1000641	OTHER_SHIPPING	01-DEC-2006	7918	UPS	INCOMPLETE
1000645	OTHER_SHIPPING	04-DEC-2006	7918	UPS	IN-PROCESS
5000003	OTHER_SHIPPING	04-DEC-2006	7918	UPS	IN-PROCESS
5000004	OTHER_SHIPPING	05-DEC-2006	7918	UPS	IN-PROCESS
5000009	OTHER_SHIPPING	05-DEC-2006	7918	UPS	INCOMPLETE
5000097	OTHER_SHIPPING	12-DEC-2006	7918	UPS	IN-PROCESS
5000128	OTHER_SHIPPING	13-DEC-2006	7918	UPS	IN-PROCESS
5000130	SUPPLIES	13-DEC-2006	7918	UPS	CANCELLED
5000187	OTHER_SHIPPING	19-DEC-2006	7918	UPS	CANCELLED
5000188	OTHER_SHIPPING	19-DEC-2006	7918	UPS	CANCELLED

Open

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