Monitoring the Procure-to-Pay Process

This guide will cover:

- The procure-to-pay process within WyoCloud.
- Tracking a transaction from requisition submission through purchase order then payment.

**Step One**

Navigating to the Manage Requisitions page.

- From the WyoCloud homepage, select the **Navigator** icon. Under Procurement, choose **Purchase Requisitions**:
You will be brought to the **Purchase Requisitions** home page. Select **Manage Requisitions** from the upper right corner of the screen:

![Purchase Requisitions Page](image)

**Step Two**

Search for and explore your requisitions.

- From the **Manage Requisitions** page you can view all requisitions currently in WyoCloud. The Manage Requisitions page is formatted into two sections: **Search** (top) and **Search Results** (bottom). The page will default to displaying all requisitions you have access to viewing in the **Search Results** section. You may use the **Search** or **Advanced Search** to narrow the requisitions that display.
Within the **Search Results** section, you will note that there are several column headers. These headers provide detailed information regarding the requisitions.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Description</th>
<th>Hyperlink?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition</td>
<td>Displays the <em>requisition number</em>.</td>
<td>Yes. Clicking on the requisition number will route users to the Requisition Overview page.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the item(s) contained within the requisition.</td>
<td>No</td>
</tr>
<tr>
<td>Entered By</td>
<td>Displays the user who entered and submitted the requisition.</td>
<td>No</td>
</tr>
<tr>
<td>Creation Date</td>
<td>The date on which the requisition was submitted.</td>
<td>No</td>
</tr>
<tr>
<td>Approval Amount</td>
<td>Total cost of the requisition.</td>
<td>No</td>
</tr>
<tr>
<td>Status</td>
<td>Displays the current status of the requisition in the approval process. This includes: Approved, Canceled, Incomplete, Pending Approval, Rejected, Returned, and Withdrawn.</td>
<td>Pending Approval only. When a requisition is in Pending Approval status, you may click on it to view the current status of the requisition in the approval process. See Step Three for more detail.</td>
</tr>
<tr>
<td>Fund Status</td>
<td>Describes the status of the funds that are being charged for the requisition.</td>
<td>No</td>
</tr>
<tr>
<td>Order Status</td>
<td>Describes the status of the order. May be Open or Closed.</td>
<td>No</td>
</tr>
<tr>
<td>Order</td>
<td>Will display the purchase order number, provided the requisition has passed approval and has a Liquidated fund status.</td>
<td>Yes. Selecting the hyperlinked PO number will route you to the Purchase Order overview page. See Step Four for more details.</td>
</tr>
</tbody>
</table>
Step Three

Requisitions engaged in the approval process will display a status of *Pending Approval*. You can view where the requisition is by clicking on the hyperlinked text.

- Under the **Status** column header, click on *Pending Approval*:

![Diagram showing the approval process]

A check mark will note that the requisition has been **approved** by the user.

Approval Names highlighted in blue denote the current stage the approval is at.

A **blank box** represents that the requisition is **awaiting approval** from the user. If there are two users at a particular level, approval from both is required.

- By selecting this option, you will be routed to the **Approval** page. Scroll to the bottom of the page to view the diagram and identify where the requisition is in the approval process and which individual it is currently awaiting approval from:
Step Four

After a requisition has passed its requisite approvals, you can use the Manage Requisitions page to locate the Purchase Order ("PO") with which it is associated.

- From the Manager Requisitions page, identify a requisition line that has a Fund Status of Liquidated, and also has a hyperlinked purchase order number under the Order column.

- By clicking on the hyperlinked PO number, you will be routed to the Purchase Order Overview page.
- In the General section, you can find information such as Supplier, Ship-to Location and other pertinent order details.
- Scrolling down the Terms, Notes and Attachments and Additional Information are added sections that carry purchase order information.

- You will also find a summary chart of the Order Lifecycle on the right hand side of the Purchase Order page. This shows a graphical representation of the Ordered, Received, Delivered, and Invoiced quantities.
Step Five

Locating the invoice number.

- To ensure your purchase order has been fully paid, you can locate the invoice number in WyoCloud. Begin, click on the Navigator, then under Procurement, select Purchase Orders.

- Open the Task menu on the right hand side of the screen and select Manage Orders.
Enter your purchase order number in the **Order** field, remove your name from the **Buyer** field, change **Include Closed Documents** to **Yes** and click **Search**. For this step we are going to review Purchase Order: P301935.

Once you locate your desired purchase order, you can view its status two ways:
- First, you can simply hover your cursor over the image under the **Life Cycle** column, this will display order status information. The display may change based on the order’s **Status**:
Alternatively, you can click on the life cycle image to be routed to the **Order Life Cycle** page, which contains more detailed information regarding the purchase order:

- The **Order Life Cycle** page will contain invoice information, if applicable. Scroll to the **Invoice** section and select the hyperlinked invoice number:
- Selecting the *invoice number* will route you to the **Invoice** page. From here you can view detailed information surrounding the invoice including an attached image of the invoice.

![Invoice Image](image1)

- After selecting the invoice, select the **Payments** tab on the bottom half of the screen. The *check number* is located under the **Number** column.

![Payment Details](image2)

This concludes the Monitoring of the Procure-to-Pay process in WyoCloud.

If you have questions about this document or need further guidance please contact Procurement & Payment Services.