My Workflow Items Report:
Find Your Item Status in PaperSave Workflow

What is the My Workflow Items Report?

The My Workflow Items Report is a visibility tool for all users of PaperSave Workflow, both submitters and approvers. It is intended to provide as-of-the-moment statuses for every item a user has ever 'touched' during the Workflow process, whether the item is in-progress or completed. 'Touched' is defined as either having submitted the item and/or having taken any action within the workflow on the item (e.g. Approve, Send to Second Approver, Reject, etc.).

This report will not be able to return all items within a particular department, college, etc. Simply put, if you didn't 'touch' a given item, then you won't see it here.

Note for glitched items: If you submitted an RFD but did not receive a confirmation email from the PaperSave system, you can use this report to see if it went through. In those cases, you may see it along with something like 'Submission Issues' or 'Correction Needed' or 'Initial' as the status in the 'Current Step' field. If you do see it, even with one of these statuses, then the Foundation has received it and will fix it, and it will be manually reassigned to your approver. If do not see the item at all, then please re-submit.

What the Report is NOT:

The appearance of any given status at any given time does not in any way imply or obligate any payment schedule or expectations, nor does it imply or obligate the item's 'owner' at the time to take or not take any particular action.

In other words, this report is intended to be helpful with item visibility only. It should increase the ability to quickly answer vendor inquiries while decreasing the need to ask internal questions about item status and submission histories. Please be respectful when considering whether, how, and how often to ask your approver(s) and/or the Ed Foundation about the progress of an item. Items appearing to be 'stuck' in a step may be there for good reason, including but not limited to an approver's busy calendar or the Ed Foundation's normal processing schedule.

Accessing the Report in PaperSave:

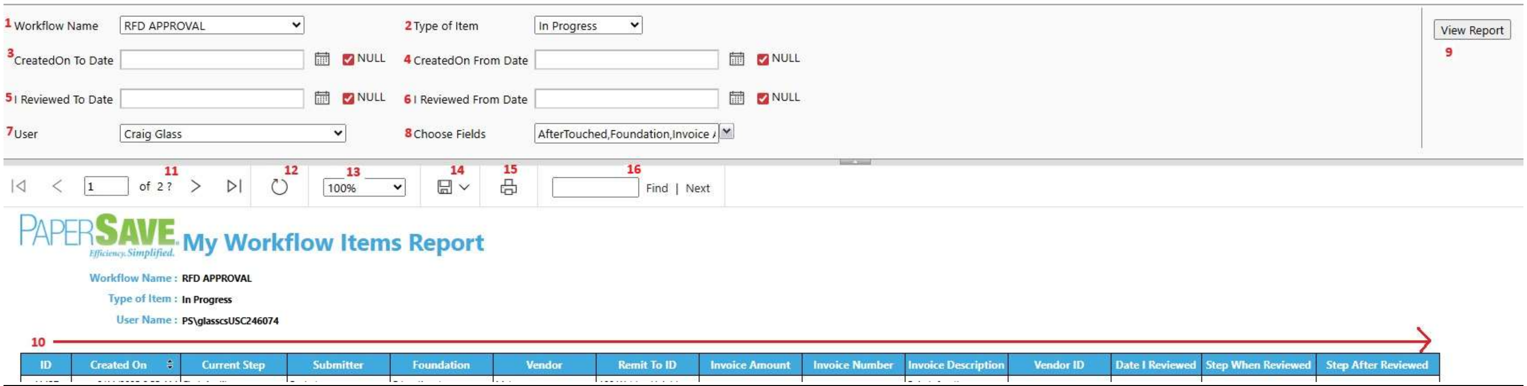
Click here to access the My Workflow Items Report in PaperSave, or manually enter the link as follows: https://report.cloud1.papersave.com/reportserver/ReportService2010.asmx?/246074/PaperSave%20Reports/My%20Workflow%20Items%20Report.

When the login popup appears, **use your PaperSave credentials** (the one where your username ends in USC246074).

If you receive an error message after entering your credentials, dismiss it and refresh your browser (do not restart it, just refresh it). This usually gets you to the report. If you keep getting the login popup, then you may need a password reset.

This report will not work with Microsoft Edge as the browser. Please use Google Chrome or Mozilla Firefox instead.

Step-by-Step Reference (using the red numbers):



1. Workflow Name:

RFD APPROVAL is the operating workflow. This is where items are approved by departments/colleges and reviewed by Foundation staff before payment. If you see an item in this workflow, it is not yet ready to be paid and is simply awaiting normal action(s) (or has been rejected, if it's in the Entered step).

EF Invoice Submission is the payment workflow. Items here have received all approvals and are ready to be paid (In Progress) or have already been paid (Completed). Note that the Foundation has a standard payment schedule, and items showing as In Progress may be paid either in the upcoming or the following weekly payment run.

2. Type of Item:

All: All items, including In Progress and Completed
In Progress: Items awaiting further action in the selected workflow.
Completed: In the RFD APPROVAL workflow, these are rejected items; nothing more can be done with them, and any re-submission must be done using a new RFD form. In the EF Invoice Submission workflow, these are paid items; nothing more can be done with them, and they should have payment information showing (type, number, date).

3. CreatedOn To Date:

Search parameter dictating the earliest possible submission date of items you want to find. Choose NULL to go back to all time.

4. CreatedOn From Date:

Search parameter dictating the most recent possible submission date of items you want to find. Choose NULL to include everything up to the present moment.

5. I Reviewed To Date:

Search parameter dictating the earliest possible date you touched items you want to find. Choose NULL to go back to all time.

6. I Reviewed From Date:

Search parameter dictating the most recent possible date you touched items you want to find. Choose NULL to include everything up to the present moment.

7. **User:**

Only your name should show here.

8. **Choose Fields:**

You can select which fields to show if desired. The list is dependent upon which workflow is chosen in Step 1.

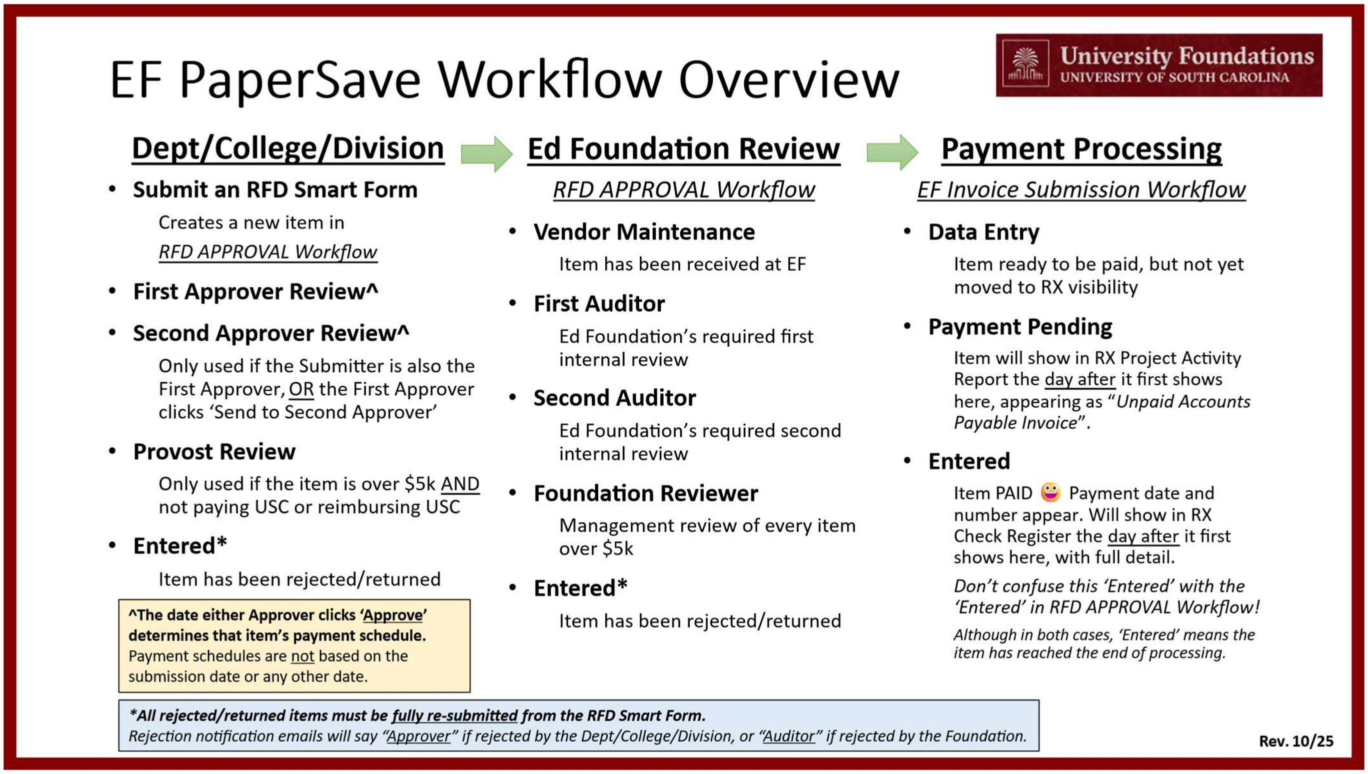
9. **View Report Button:**

You must click this button in order to see results, or to see new results if you change the any search parameters.

10. **Fields and Results Table:**

ID: The workflow ID assigned to the item; this should match the submission notification email received by the submitter.
Created On: RFD submission date
Current Step: Where the item is in the selected workflow at the moment. See the EF PaperSave Workflow Overview chart below for more information.
Submitter: RFD submitter name
Foundation: Should always say Educational Foundation (EF)
Vendor: Vendor legal name
Remit To ID: Vendor address as selected for the particular item, including dba name if applicable
Invoice Amount: Total amount to be paid for the particular item
Invoice Number: Invoice number if paying a third party, or 'NA' (or n/a or na) if a reimbursement
Invoice Description: Description that will appear on the EFT payment notification email sent to the vendor
Vendor ID: Ed Foundation's internal number to identify the vendor
Date I Reviewed: If you are the submitter, then this will show the submission date. If you are an approver, then this will show the date you received the item (if still unapproved) or the date you approved the item.
Step When Reviewed: If you are the submitter, this will be blank. If you are an approver, then this will show the step when you had it (or still have it).
Step After Reviewed: If you are the submitter, this should show First Approver Review or Second Approver Review (if you are also a First Approver). If you are an approver, this could show Second Approver Review, Provost Review, Vendor Maintenance, Entered (if you rejected it), or First Approver Review (if you are also a Second Approver).

The following appear only for Completed Items in EF Invoice Submission workflow:
Payment Type: Electronic Funds Transfer, Check, or Bank Draft (wire transfer). Note 1: This won't show at all for older items. Note 2: If a manual change was made in order to pay by a method other than the default, that change may not reflect here.
Check Number: Either the physical check number or the sequential EFT payment number
Payment Date: Date of actual payment issuance
Fiscal Year: Fiscal Year based on the invoice's Post Date (not shown in this report)



If an item is in First Approver Review, Second Approver Review, or Provost Review, then the Ed Foundation has not yet received it.

11. **Page Navigation**

12. **Refresh Data**

13. **Zoom**

14. **Export:**

The table can be exported in any number of formats. This can make searching much easier. Click the down arrow.

15. **Print**

16. **Find Within Table:**

You can only search for text strings that show in the results table. You cannot search for things like project IDs since those do not show here.

An Important Reminder:

This report is intended to be helpful with item visibility only. It should increase the ability to quickly answer vendor inquiries while decreasing the need to ask internal questions about item status and submission histories. Please be respectful when considering whether, how, and how often to ask your approver(s) and/or the Ed Foundation about the progress of an item. Items appearing to be 'stuck' in a step may be there for good reason, including but not limited to an approver's busy calendar or the Ed Foundation's normal processing schedule.

Support:

For more information and FAQs, see our PaperSave Resources webpage at
uscfoundations.com/papersave

Specific problems with PaperSave Workflow without answers on the PaperSave Resources webpage can be relayed to the Ed Foundation by sending an email to FounSyst@mailbox.sc.edu or through the "Need help?" request form on the Foundations' Systems Support page. Questions regarding policy or item status should be directed to EdFndAP@mailbox.sc.edu; Accounts Payable Policies can be found here.

For Foundation Policy questions, documentation needs, confirmation of whether a vendor is in the system, or to ask another A/P question that is not about the PaperSave system itself, please email A/P staff directly and/or at EdFndAP@mailbox.sc.edu.

THANKS!

University Foundations