| Initiator | Issue | Date of Initial Request | Scale 1-3, 1=HP, 2=NH, 3=CW | Estimate (Prior to Discovery/Req uirements Review) | Notes | |
|---|---|---|---|---|---|---|
| | **Procurement Portal - Release 2.0** | | | | | |
| Takiya | From the PRF tansfer vendor information for a purchase order or modification. The only time this would potentially be different is with a p-card purchase. | 6/6/2023 | 2 | | I am not sure what the ask is. | possible for vendor name auto-populate into requistion form and be able to edit more instances of vendor not on Pcard Do for all then edit where needed |
| Cheryl | Add a fingerprint queue similar to the Furniture/Signage queue. The fingerprint queue would route to Geri Fitzgerald. Functionality to include process p-card, return, on-hold, complete. | 6/2/2023 | 1 | 40 | | |
| Julia | Autofill user name, email, phone number | 6/2/2023 | 2 | | Would have to figure out if this is available. I also thought the reason we didn't want this was because there my be people filling out PRF's for others? | autofill still wanted but another field if it is being filled out for someone else. 2 sections username email for for each person (person who fills out and person who requests)...might be labor intensive to keep up list. we will look into a bit more but might scrap...layers of what might need to be done with returning info |
| Cheryl | Integrate with Advantage system | 6/2/2023 | 1 | | This would need further research and what integration are they wanting. | what to integrate... make sure accounting strings are valid, PO number is entered gets automatically, show PO creat |
| Cheryl | Integrate with Invoice Processing OnBase system | 6/2/2023 | 1 How so? | | This would need further research and what integration are they wanting. | show PO creation more of the who process...burndown information - Dominic |
| Cheryl | Reporting | 6/2/2023 | 1 | | This would need further research and what they are wanting. | have list of reports - Julia provided lists - Dom will verify list biggest need verify workloads - volume by divisions and programs |
| Julia | Division of duties fail safe--if an individual in procurement enters an order into the portal, the system should not allow that individual to also process the order. The system should force the user to route the order to another PS for processing. | 6/2/2023 | Depends on complexity | 80 | | |
| Cheryl | Notifications? | 6/27/2023 | C/J to review and revamp | | More clarification. This would need further research and what they are wanting. | rewording and maybe adding additional...all notifications contain the same info. Jolene will provide current list of notification and note differences so we can determine best changes sumittor bold sequence number |
| Kim King | Add vendor name to Request Submitted email notification | 6/27/2023 | 1 Maybe not PRF stage | 8 | | see above consistency will all |
| Cheryl | Add a gift card purchase queue | 7/6/2023 | 1 | 80 | | |
| Alaina Rinne | Default accounting string based on program | 6/5/2023 | 2 | 80 | | |
| Alaina Rinne | Qty queue should allow for decimals | 6/5/2023 | 2 | 20 | | |
| Julia | All attachments related to sequence number should under related items in completed queue | 8/9/2023 | 1 | | I am not sure this is possible. Will need to research. | need additional attachment capability, hard to look in multiple places, Dominic will research...sqeq number not created until form is submitted |
| Millette or Alice | Have the tax field be a % rather than an amount | 8/17/2023 | 1 | 8 | | |
| Cheryl | If a PRF is placed on hold or Return to Requester, a mandatory note that is visible to everybody on PRF and Purchase Requisition Form | 8/22/2023 | 1 | 8 | | |
| Millette | Add a 2nd item number line and accounting string line with a line item field | 8/22/2023 | 1 | | Functionality exists please clarify | want to - see OET Purchase Request- |
| Matti | Remove Matti from the Furniture pending queue and redirect to requester | 8/22/2023 | 1 | 16 | | |
| Michael Cora | Have a way that the Requestor can respond to questions asked of them within the PP when the PS send them a note or question from the Notify Requestor AHT | 8/29/2023 | 1 Could be # 2 | | Will need to research options. | capture some of the back and forth information. we can notify requestor but they cannot respond back - option |
| Dominic | Add an AHT to be able to fix mistakes in PRFs and update the programs and/or divisions | 8/30/2023 | 1 | | This is fixed | |
| Alaina Rinne | Add the description from the PRF to the Notification email that goes to the Requestor after submitting a PRF | 8/30/2023 | 1 Description of what and based of? | 8 | | |
| Cheryl | Include additional places for PS to upload additional documents after the purchase | 8/30/2023 | 1 I thought this is | | Additional docs? Currently PC rec and Purchase Order | emails, receipts & other...p req form has breakdown will need more...same as Purchase Request for need different button...couple options available...change auto name string |
| Omar | Allow for deletion of documents by PH Supervisor User Group | 8/30/2023 | 1 I thought this is | 4 | Supervisor does not have the ability to delete | |
| Omar | Enable capability to send via email vendor POs through the portal | 8/30/2023 | 1 | | More clarificaton please. | update access for user with workflow access |

| Name | Description | Date | # | | Clarification | Notes |
|---|---|---|---|---|---|---|
| Cheryl | Have a box to check for OET-related items or a separate WF similar to Furniture & Fingerprinting. | 9/1/2023 | 1 | | More clarificaton please. | easily identified to catch ahead of time, way to identify subscription based item, report on them monthly add information to form- Julia has questions/answers |
| Cheryl | Add and define Requestor versus Submitter roles | 9/1/2023 | 1 | | More clarificaton please. | discussed first call requestor & |
| Cheryl | Final Cost should be mandatory in Completed queue | 9/1/2023 | 1 | 16 | | |
| Ruth | Add fields that identify which sections of the PO (Transaction, Expanded Description, etc.) | 9/5/2023 | 1 | Could be included in the Notes section | More clarificaton please. | transfer from prf to advantage..add field around notes area, program can specify what they want (1 box) only is PO or PO mod is selected (Julia has additional information on what needs to be in those fields |
| Cheryl/Julia | Return to Requester - Add all fields that are in the procurement inbox/procurement working | 9/5/2023 | 2 | | More clarificaton please. | all columns across top - same filters across the top in all all queues or similar add date - into procurement inbox tell us what is wanted |
| Cheryl/Julia | Make Use Tax - Yes/No mandatory | 9/5/2023 | 1 | 8 | | |
| Cheryl | Name of Vendor - when start typing vendor name field auto populates | 9/5/2023 | 1 | | Where are we getting the autofill from? | discussed |
| Cheryl | Merge duplicate vendor names | 9/5/2023 | 1 | | More clarificaton please. | |
| Cheryl | Update return to requester notifications--how often are they getting notifications update terminology | 9/6/2023 | | 20 | | |
| Julia | Add capability for PS to attach any documents to Purchase Requisition form similar to PRF and name documents according to what they are | 9/11/2023 | 1 | | More clarificaton please. | discussed |
| Julia | Have original docs from PRF carry over onto the requisition form | 9/28/2023 | 1 | | More clarificaton please. | discussed |
| Gwen | Copy feature for recurring monthly charges | 9/11/2023 | 2 | | More clarificaton please. Duplicate of 51? | not really a copy feature - recurring monthly queue load balance - when would it be removed, if this is recurring checkbox to remove if string changes or year to remove it from workflow |
| Millette | Over $2500+ queue only for Pcard purchases and not POs | 9/7/2023 | 1 | 30 | | |
| Cheryl | Need a more effective way to RTR w/o making it go back through WF | 9/13/2023 | 1 | | Would everyone not need to re-review if changes are made? Need more clarification | discussed become part of workflow |
| Nina | Add the ability to cc someone so when PO's are submitted, that person also gets an email with all the information they need to be able to track | 9/13/2023 | 1 | 32 | | |
| Nina | Possible to search by funding source in addition to the other fields in a custom query? | 9/13/2023 | 2 | Report template to be created? More clarification | 16 | |
| Gwen | Is there a way to incorporate Task orders and RFP - Request for quotes to track them on different flow and allow to change to PRF when we get the quotes/bid win | 9/13/2023 Talk to Gwen/Cheryl | | | More clarificaton please. | defer for now |
| Gwen | Have Vendor # populate with their vendor # automatically | 9/13/2023 | 2 | | Need an Autofill | |
| Takiya | Make links contained in attached documents clickable | 9/14/2023 | 2 | | Review how they are being attached. | if it is an image it isn't clickable, but a PDF would be....if pasted as a link sopy and paste Dominic will verify |
| Takiya | Autopopulate Final/Total Price so not having to type it twice | 9/14/2023 | 2 | 6 | | |
| Takiya | Drag and drop feature | 9/14/2023 | 2 | | More clarificaton please. | Can this happen when there is an attachment area...can be done on import screen but will check on attachment screen |
| Takiya | Expand all field so that full text can be seen | 9/15/2023 | 1 | Item and Description, Program Code | 16 | expand the accounting string fields so full text can be seen...program field has been an issue Requistiion form and the PRF...Program field and possible description field largest program is 10 characters |
| Gwen/Julia | Add vendor contact information for the program to provide | 9/18/2023 | 2 | | 16 | may need additional fields, vendor information under vendor name add, contact information, phone number, email.  Does not need to be required |
| Georgina | A way to identify if the item being purchased is required to be tracked per a grant requirement or is an item identified as non-capital asset and Logistics needs notified | 9/18/2023 | 3 | | 32 | check box more for reporting.  Check box Capital/Non Capital Asset |
| Takiya | notification to remove PRF lock | 9/21/2023 | 2 | | More clarificaton please. | not necessary |

| Name | Description | Date | | | Notes | Notes 2 |
|---|---|---|---|---|---|---|
| Gwen | Being able to "copy" a PRF from any point. | 9/21/2023 | 1 | | More clarificaton please. Duplicate of 37?? | similar to 37...multiply shipments or if there is a credit.. Copy certain fields would need to be more manual |
| Gwen | have the Amount charged in the Procurement part be able to do negative  in case of returns and credits to our bank accounts (-35.00) to reflect the credit. | 9/21/2023 | 1 | 16 | | Requisition form |
| Julia | Carry over item description to  transaction requisitions but make editable | 9/22/2023 | 1 | 16 | | Item # and description...don't populate on the purchase requisition form |
| Julia | In completed view the request type does not change from the initial request type to the final request type--initial PO, final Pcard.  Completed should reflect Pcard not PO on requisition form. | 9/22/2023 Glitch | | | Manual step that users should be setting... Discuss | in queue order processed & completed  change to final request type and final cost - line 62 |
| Gwen | Have the $ fields open enough to see the full dollar amount $1500.58 - right now it only shows $1,500. which is 7 characters we can have up to 15 but usally 11 characters..especially on the accounting string and COST in item information | 9/26/2023 | 1 | 32 | | $ field on the PRF - Cost |
| Cheryl | Rename PRF and Purchase Requisition Form - Final something | 9/28/2023 | 1 | 16 | | Rename the document - Final Purchase Form |
| Takiya | "Order Processed" button blacked out until it has come back from PO Review/Approve Manager Approval. The only options for a PO in the initial working could be rejected, move to hold, notify requestor and PO review | 9/28/2023 | 1 | | More clarificaton please. | add a check KW from #64 is valid... |
| Anna D. | Update Division name from Child & Maternal Health to Child and Family Health   **Addition of new one for Clinic - Division of Community Health and Records Services | 10/6/2023 | 1 | 16 | | can change |
| Gwen | Add Vendor Name to the top fields in all views (sometimes I am looking for PRF for Amazon and not a $ amount ...would be eaiser if I knew the vendor at the listing - sequence # , vendor.. so on.. | 10/6/2023 | 1 Duplicate | 16 | | |
| Millette | Able to approve in the $2500 queue ones with a lock | 10/6/2023 Glitch | | | System doesn't allow to work documents that others have open. if users hover over lock it will tell who has it open | lock issue |
| Alice | Purchase Request Status should include additional columns of what type of Purchase (Pcard-PO-Modification) and the $ amount of the purchase as well as the true vendor they used. | 11/1/2023 | 1 | | More clarificaton please. | search retrieval...is she using the query, do we need additional fields for the query..add dollar amount,  Dom can make update final vendor and final dollar amount |
| Cheryl | In Order Processed and Completed queues, include the Final Cost instead of (or in addition to) the Requested Amount | 11/1/2023 | 2 | 16 | | see 54 |
| Cheryl | Fix the search retrieval capabilities as they are not working. Particularly by Vendor | 11/1/2023 | 1 | | More clarificaton please. | |
| | PO Pending | | | | | need to created a keyword update KW based on approve on 57 |
| | PO Review | | | | | reject option here as well same as PO Pending, type a note |
| | Retrieval tab | | | | | are all fields working, |

Procurement Portal - Release 2.0

| ID | Initiator | Issue | Date of Initial Request | Scale 1-3, 1=HP, 2=NH, 3=CW | Estimate (Prior to Discovery/Requirements Review) | Final Decision | Notes | Discovery Notes | Correction/Enhancement; Nice to have: Integrations |
|---|---|---|---|---|---|---|---|---|---|
| | | **Additional Queues/Enhancements to Current Functionality** | | | | | | | |
| 1 | Cheryl | Add a fingerprint queue similar to the Furniture/Signage queue.  The fingerprint queue would route to Geri Fitzgerald.  Functionality to include process p-card, return, on-hold, complete. | 6/2/2023 | 1 | 40 | 0 | new functionality | | |
| 2 | Cheryl | Add a gift card purchase queue | 7/6/2023 | 1 | 80 | 0 | new funcitonality. Hours could be lower depending on requirements. | | |
| 3 | Millette or Alice | Have the tax field be a % rather than an amount | 8/17/2023 | 1 | 8 | 8 | modification request | | |
| 4 | Matti | Remove Matti from the Furniture pending queue and redirect to requester | 8/22/2023 | 1 | 16 | ? | modification request | | |
| 5 | Julia | Division of duties fail safe--if an individual in procurement enters an order into the portal, the system should not allow that individual to also process the order.  The system should force the user to route the order to another PS for processing. | 6/2/2023 | Depends on complexity | 80 | 0 | new funcitonality. Hours could be lower depending on requirements. | | |
| 6 | Millette | Over $2500+ queue only for Pcard purchases and not POs | 9/7/2023 | 1 | 30 | 30 | modification request fucntionality. | | |
| 7 | Cheryl | Have a box to check for OET-related items or a separate WF similar to Furniture & Fingerprinting. | 9/1/2023 | 1 | 16 | 0 | new functionality. | easily identified to catch ahead of time, way to identify subscription based item, report on them monthly add information to form- Julia has questions/answers | |
| 8 | Anna D. | Update Division name from Child & Maternal Health to Child and Family Health  **Addition of new one for Clinic - Division of Community Health and Records Services | 10/6/2023 | 1 | 16 | 16 | new functionality and modifiction to existing. | can change, check all divisions | |
| 9 | Cheryl | If a PRF is placed on hold or Return to Requester, a mandatory note that is visible to everybody on PRF and Purchase Requisition Form | 8/22/2023 | 1 | 8 | 8 | new funcitonality. Hours could be lower depending on requirements. | | |
| 10 | Michael Cora | Have a way that the Requestor can respond to questions asked of them within the PP when the PS send them a note or question from the Notify Requestor AHT | 8/29/2023 | 1 | TBD | | new functionality. Followup and research required. | capture some of the back and forth information.  we can notify requestor but they cannot respond back - option | |
| 11 | Cheryl/Julia | Make Use Tax - Yes/No mandatory | 9/5/2023 | 1 | 8 | 8 | new functionality. | | |
| 12 | Cheryl | Rename PRF and Purchase Requisition Form - Final something | 9/28/2023 | 1 | 8 | 8 | modification request. | Rename the document - Final Purchase Form | |
| 13 | Cheryl | Include additional places for PS to upload additional documents after the purchase | 8/30/2023 | 1 I thought this is already enabled | 8 | 8 | modification request. Additional docs? Currently PC rec and Purchase Order | emails, receipts & other...p req form has breakdown will need more...same as Purchase Request for need different button...couple | |
| 14 | Ruth | Add fields that identify which sections of the PO (Transaction, Expanded Description, etc.) | 9/5/2023 | 1 Could be included in the Notes section | TBD | 0 | Notes field already exists if chosen, but new fields would require additional hours. | program can specify what they want (1 box) only is PO or PO mod is selected (Julia has additional information on what needs to be in those fields | Are we looking to add a field or are we planning to use the Notes Section? |
| 15 | Cheryl | Need a more effective way to RTR w/o making it go back through WF | 9/13/2023 | 1 | 24 Let's discuss more | | Would everyone not need to re-review if changes are made?  Need more clarification.  New functionality. | discussed become part of workflow | |
| 16 | Nina | Add the ability to cc someone so when PO's are submitted, that person also gets an email with all the information they need to be able to track | 9/13/2023 | 1 | 32 | 0 | new functionality | | |
| 17 | Takiya | Expand all field so that full text can be seen | 9/15/2023 | 1 Item and Description, Program Code | 16 | 16 | modification request. | seen...program field has been an issue Requistiion form and the PRF...Program field and possible description field largest program is 10 characters | |
| 18 | Gwen | have the Amount charged in the Procurement part able to do negative  in case of returns and credits to our bank accounts (-35.00) to reflect the credit. | 9/21/2023 | 1 | 16 | 16 | new functionality | Requisition form | |
| 19 | Julia | Carry over item description to transaction requisitions but make editable | 9/22/2023 | 1 | 16 | 16 | new functionality | Item # and description...don't populate on the purchase requisition | |
| 20 | Gwen | Have the $ fields open enough to see the full dollar amount $1500.58 - right now it only shows $1,500. which is 7 characters we can have up to 15 but usally 11 characters..especially on the accounting string  and COST in item information | 9/26/2023 | 1 | 16 | 16 | modification request. | $ field on the PRF - Cost | |
| 21 | Takiya | "Order Processed" button blacked out until it has come back from PO Review/Approve QueueManager Approval. The only options for a PO in the initial working could be rejected, move to hold, notify requestor and PO review | 9/28/2023 | 1 | 8 | 8 | More clarificaton please. | add a check KW from #24 is valid... | |
| 22 | Alice | Purchase Request Status should include additional columns of what type of Purchase (Pcard-PO-Modification) and the $ amount of the purchase as well as the true vendor they used. | 11/1/2023 | 1 | 8 | 8 | new functionality. | search retrieval...is she using the query, do we need additional fields for the query..add dollar amount, Dom can make update final vendor and final dollar amount | |
| 23 | Cheryl | Fix the search retrieval capabilities as they are not working. Particularly by Vendor | 11/1/2023 | 1 | 0 | 0 | training issues after update of keywords | | |
| 24 | | PO Pending | | | 16 | 16 | new functionality | need to created a keyword update KW based on approve on 54 | |
| 25 | | PO Review | | | 8 | 8 | new functionality | reject option here as well same as PO Pending, type a note | |

| # | Name | Description | Date | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 26 | Julia | All attachments related to sequence number should under related items in completed queue | 8/9/2023 | 1 | | 12 | 12 Will need to research. | New functionality. I am not sure this is possible. | need additional attachment capability, hard to look in multiple places, Dominic will research...sqeq number not created until form is |
| 27 | Cheryl | Final Cost should be mandatory in Completed queue | 9/1/2023 | 1 | | 16 | 16 new functionality | | |
| 28 | Julia | Have original docs from PRF carry over onto the requisition form | 9/28/2023 | 1 | | 16 | 16 new fucntionality | | |

**ISSUES WITH NOTIFICATIONS**

| # | Name | Description | Date | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 29 | Kim King | Add vendor name to Request Submitted email notification | 6/27/2023 | 1 | Maybe not PRF stage but final requisition stage? | 8 | 8 modification | | see above consistency on all notifications |
| 30 | Cheryl | Update return to requester notifications--how often are they getting notifications update terminology | 9/6/2023 | | | 20 | 0 | modification and new functionality. Could be less hours after requirements | |
| 31 | Alaina Rinne | Add the description from the PRF to the Notification email that goes to the Requestor after submitting a PRF | 8/30/2023 | 1 | Description of what and based of? | 8 | 8 modification | | |

**USER ACCESS/ROLES**

| # | Name | Description | Date | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 32 | Omar | Allow for deletion of documents by PH Supervisor User Group | 8/30/2023 | 1 | I thought this is already enabled | 4 | 4 | new functionality. Supervisor does not have the ability to delete | |
| 33 | Omar | Enable capability to send via email vendor POs through the portal | 8/30/2023 | 1 | | 8 | 8 new functionality. | | update access for user with workflow access |
| 34 | Cheryl | Add and define Requestor versus Submitter roles | 9/1/2023 | 1 | | TBD | see comment new functionality | | additional clarification required. |

**Vendor Requests Chanes/Enhancements**

| # | Name | Description | Date | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 35 | Cheryl | Name of Vendor - when start typing vendor name field auto populates | 9/5/2023 | 1 | | TBD | see comment | New functionality. Will need to identify where autofill list is coming from. | discussed. Need to confirm this is still a request. |

**Integrations**

| # | Name | Description | Date | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 36 | Cheryl | Integrate with Advantage system | 6/2/2023 | 1 | | 80 | Will discuss with Millette | new funcitonality. This would need further research and what integration are they wanting. | what to integrate... make sure accounting strings are valid, PO number is entered gets automatically, show PO creat. Hours could vairy depending on requirements. |
| 37 | Cheryl | Integrate with Invoice Processing OnBase system | 6/2/2023 | 1 | | 80 | Will discuss with Millette | new funcitnality. This would need further research and what integration are they wanting. | show PO creation more of the who process...hours could vairy depending on requirements. |

**Duplicate or Similar Requests**

| # | Name | Description | Date | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 38 | Gwen | Have Vendor # populate with their vendor # automatically | 9/13/2023 | 2 | | 40 | 0 Need an Autofill | | same as #35 |
| 39 | Gwen | Being able to "copy" a PRF from any point. We mean to create a duplicate PRF for recurring charges | 9/21/2023 | 1 | | TBD | | More clarificaton please. Duplicate of 53?? | multiply shipments or if there is a credit.. Copy certain fields would need to be more manual |
| 40 | Cheryl | Merge duplicate vendor names | 9/5/2023 | 1 | | TBD | | More clarificaton please. | related to #35 |
| 41 | Gwen | Have Vendor # populate with their vendor # automatically | 9/13/2023 | 2 | | TBD | 0 Need an Autofill | | related to #35 |
| 42 | Gwen | Is there a way to incorporate Task orders and RFP - Request for quotes to track them on different flow and allow to change to PRF when we get the quotes/bid win | 9/13/2023 | Talk to Gwen/Cheryl | | TBD | 0 More clarificaton please. | | defer for now |
| 43 | Gwen | Add Vendor Name to the top fields in all views (sometimes I am looking for PRF for Amazon and not a $ amount ...would be eaiser if I knew the vendor at the listing - sequence # , vendor.. so on.. | 10/6/2023 | 1 Duplicate | | 16 | 16 | | related to #54 |
| 44 | Julia | Add capability for PS to attach any documents to Purchase Requisition form similar to PRF and name documents according to what they are | 9/11/2023 | 1 | | 8 | 8 More clarificaton please. | | related to #13 |
| 45 | Julia | Have original docs from PRF carry over onto the requisition form | 9/28/2023 | 1 | | 16 | 0 More clarificaton please. | | discussed |

**Rated as 2 or 3**

| # | Name | Description | Date | | | | | | |
|---|------|-------------|------|---|---|---|---|---|---|
| 46 | Takiya | From the PRF transfer vendor information for a purchase order or modification. The only time this would potentially be different is with a p-card purchase. | 6/6/2023 | 2 | 20 | 0 new functionalty | | We can populate(copy) the vendor name to the requistion form. There will be the ability to edit the vendor information...Copy as much as possible but allow option to edit more instances of vendor not on Pcard Do for all then edit where needed | |
| 47 | Alaina Rinne | Default accounting string based on program | 6/5/2023 | 2 | 80 | 0 new functionalty | | | |
| 48 | Alaina Rinne | Qty queue should allow for decimals | 6/5/2023 | 2 | 20 | 20 new functionalty | | | |
| 49 | Gwen | Copy feature for recurring monthly charges | 9/11/2023 | 2 | 40 | 40 More clarificaton please. Duplicate of 39? | | not really a copy feature - recurring monthly queue load balance - when would it be removed, if this is recurring checkbox to remove if string changes or year to remove it from workflow | |
| 50 | Nina | Possible to search by funding source in addition to the other fields in a custom query? | 9/13/2023 | 2 | Report template to be created? More clarification | 16 | 16 new functionalty | | |
| 51 | Takiya | Autopopulate Final/Total Price so not having to type it twice | 9/14/2023 | 2 | 6 | 6 new functionalty | | | |
| 52 | Gwen/Julia | Add vendor contact information for the program to provide | 9/18/2023 | 2 | 16 | 16 new functionalty | | may need additional fields, vendor information under vendor name add, contact information, phone number, email. Does not need to | |
| 53 | Cheryl/Julia | Return to Requester - Add all fields that are in the procurement inbox/procurement working | 9/5/2023 | 2 | 8 | 8 new functionality and modifiction to existing. | | all columns across top - same filters across the top in all all queues or similar add date - into procurement inbox tell us what is wanted | |
| 54 | Cheryl | In Order Processed and Completed queues, include the Final Cost instead of (or in addition to) the Requested Amount | 11/1/2023 | 2 | 16 | 16 new functionality. | | see #49 | |
| 55 | Georgina | A way to identify if the item being purchased is required to be tracked per a grant requirement or is an item identified as non-capital asset and Logistics needs notified | 9/18/2023 | 3 | 32 | 32 new functionalty | | check box more for reporting. Check box Capital/Non Capital Asset | |

| Re think/scrap | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 56 | Julia | Autofill user name, email, phone number | 6/2/2023 | 2 | TBD | 0 others? | Would have to figure out if this is available. I also thought the reason we didn't want this was because there my be people filling out PRF's for | someone was filling the form out for someone else. Autofill still wanted but another field if it is being filled out for someone else. 2 sections username email for for each person (person who fills out and person who requests)...might be labor intensive to keep up list. we will look into a bit more but might scrap...layers of what might need to be done with returning info | might scrap due to all pieces involved |
| 57 | Takiya | notification to remove PRF lock | 9/21/2023 | 2 | TBD | 0 More clarificaton please. | | not necessary | |
| 58 | Millette | Add a 2nd item number line and accounting string line with a line item field | 8/22/2023 | 1 | TBD | Functionality exists please clarify | | same acct string don't want to - see OET Purchase Request- | |

| Completed | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 59 | Dominic | Add an AHT to be able to fix mistakes in PRFs and update the programs and/or divisions | 8/30/2023 | 1 | | 0 see comment | This is fixed | Resolved | |
| 60 | Julia | In completed view the request type does not change from the initial request type to the final request type--initial PO, final Pcard. Completed should reflect Pcard not PO on requisition form. | 9/22/2023 Glitch | | | 0 need amount | verified this was a glitch. | Resolved. | |
| 61 | Millette | Able to approve in the $2500 queue ones with a lock | 10/6/2023 Glitch | | 0 | 0 tell who has it open | System doesn't allow to work documents that others have open. if users hover over lock it will | lock issue. Resolved. | |
| 62 | Takiya | Drag and drop feature | 9/14/2023 | 2 | 0 | 0 This is not possible. | | resolved. | |
| 63 | Takiya | Make links contained in attached documents clickable | 9/14/2023 | 2 | 0 | 0 This is not possible. | | resolved | |

| | | | | | 1064 | 440 | | | |