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What is a Justification Document & When Should It Be Used?

A justification document should be completed for non-catalog sole source purchases that exceed $10,000 and are not covered by a bid or contract. This new online process replaces the paper sole source justification form completed in the past. A justification document is also used for emergency purchases that have or could impose significant provable loss to the University or where human life or property is endangered.

A justification document can be created as part of the create requisition process or can be created for an existing requisition if it was not originally included. Approval of the req is separate from approval of the Justification Document. Requisitions still require department approval as designated by fiscal policy. Justification documents are routed to authorized individuals to approve sole source and emergency purchase requests.
Create a Requisition & Associate a Justification Document

This topic takes you through how to add a Justification Document in the Create Requisition process.

**Navigation: eProcurement > Create Requisitions**

1. Enter a non-catalog requisition with necessary information on Define Requisition, Add Items and Services, and Review and Submit pages.

2. A scrolling marquee appears at the bottom of the Review and Submit page asking if you need to include a justification document for your requisition.

   Click the Add Justification Document hyperlink.
A message appears to notify you the req will be saved to continue.

Click OK button.

**NOTE:** The saved requisition will not be routed for approval, so you will need to return to the requisition to submit it through workflow to the designated requisition Approver(s).

A new window opens to complete the online justification document. The fields automatically populate with the requisition information. Do not change these values.

Click **Add a Document** button.
Provide responses in the fields on the Wizard Execute – Document Creation page. Those marked with an asterisk require a response. After each response, the system does a brief refresh of the page, so pause a moment after clicking into the next field.

**NOTE:** Subject Expert Name must be an expert in the respective field who is able to defend this justification.

**NOTE:** Enter only digits in the cost field.
After providing the required information, you will either Save the Justification Document to submit for approval later, or Finish to submit the document to the purchasing staff for review and approval.

In this example, you will Save the Justification Document.*

Click the **Save for Later** button.

**NOTE:** Approval of the Justification Document does not replace the regular Approver’s approval of the requisition.

*If the Justification Document is complete and ready to submit for approval, click **Finish** and go to Step 4, page 21 in the Create & Associate a Justification Document for Existing Requisition topic.
7 Click OK button.

The Create Document page displays. Click **Save** button.

Document has been saved and can be retrieved for editing and/or submittal at a later time.

**NOTE:** Go to **Submit a Saved Justification Document for Approval** topic beginning on page 8 for information of how to retrieve and submit a previously saved justification document.

End of Create a Requisition & Associate a Justification Document topic.
Submit a Saved Justification Document for Approval

This topic takes you through how to access and submit a saved justification for existing requisition.

Navigation: Supplier Contracts > Create Contracts and Documents > Document Management

1. The Add a Document page displays.
   Click Find an Existing Document hyperlink at bottom right.

2. Source Transaction should be Ad Hoc
   SetID should be UOFMO
   Document Type should be Justification Documents.
   In Request BU field, enter the Business Unit of the existing requisition associated to the Justification Document.
   Enter the 10-digit Requisition ID
   Click Search button.
The document displays in the Search Results section. Description references the associated Requisition ID.

Click on the hyperlink in the Document Keys column to access the saved Justification Document.

Create Document page displays. Click **Create Document** button.
The Wizard Execute – Document Creation page displays and contains the responses and information entered when the Justification Document was last saved.

Make any necessary edits.

Click Finish button.
The Document Management page displays. Under View Edit Options you can view or edit the document.*

It should be noted if you are creating the document but are NOT the expert in the field for this request, you must click View Document button to print the form, obtain an original signature, scan the document and add the signed electronic document to the Justification Document by clicking the Add Attachments/Related Documents hyperlink to add the signed version before submitting for approval.

Click View Document button.

NOTE: If person who created the requisition is same as the Expert in Field, you do not need to click View Document (Steps 6-14 on pages 11-16), instead go to Step 15 on page 17.

* For instructions on how to edit the justification document, see topic Edit a Justification Document beginning on page 30.

TIP: If a new window does not open upon clicking View Document button, try holding down the Ctrl key while clicking the View Document button until the new window opens.
If Word does not automatically open and display the Word version of the document, a new window opens with an XML version of the Justification Document.

Click the Page icon in the browser and select Edit with Microsoft Office Word.
Submit a Saved Justification Document for Approval

Microsoft Word will open in a new window with the Justification Document in Word format.

Print the Document and obtain the Expert in Field’s signature. Scan the signed document into a PDF file and save to your computer.

**NOTE:** If person who created the requisition is same as the Expert in Field, you do not need to print, sign, scan, and attach the form.
9. The scanned document now needs to be added to the system.

On the Document Management page, click the **Add Attachments/Related Documents** hyperlink.

10. Click the **Upload a Document Attachment File** hyperlink.
Click Browse button

Locate and select the file with the scanned signed document. Click Open button.
13. Click **Upload** button.

14. The newly added file appears in the list of Attachments.

   **We strongly recommend you enter a Title for the attachment**, (i.e. “Version signed by expert”).

   At this point, additional attachments can be attached by clicking the **Upload another Document Attachment File**, if there is other supporting information to include with the Justification.

   Click **OK** button to return to Document Management page.
On the Document Management page, notice the link used to attach the file is now called **Modify Attachments/Related Documents**. This indicates a file has been attached.

Click **Submit for Approval** button in the middle column of the Review and Approval section to submit the Justification Document for approval.

**NOTE:** Approval of the Justification Document does not replace the regular Approver’s approval of the requisition.
The Document Approval Status page appears.

If desired, you can add any additional notes in the Approval Comments field.

Click the Save button.

End of Submit a Saved Justification Document for Approval topic.
CREATE & ASSOCIATE A JUSTIFICATION DOCUMENT FOR EXISTING REQUISITION

This topic takes you through how to include Justification Document to an existing requisition.

Supplier Contracts > Create Contracts and Documents > Document Management

1. The Add a Document page displays.
   - Source Transaction will be Ad Hoc
   - SetID will be UOFMO

2. Click dropdown arrow on Document Type field and select Justification Documents.
   - Ad Hoc ID should remain Next.
   - In Request BU field, enter the Business Unit of the existing requisition associated to the Justification Document.
   - Enter the 10-digit Requisition ID then use tab key or click in the Description field. The description field automatically populates.
   - Click Add a Document button.
Provide responses in the fields on the Wizard Execute – Document Creation page. Those marked with an asterisk require a response. After each response, the system does a brief refresh of the page, so pause a moment after clicking into the next field.

NOTE: Subject Expert Name must be an expert in the respective field who is able to defend this justification.

NOTE: Enter only digits in the cost field.
After providing the required information, you will either Save the Justification Document to submit for approval later, or click Finish to submit the document to the purchasing staff for review and approval.

In this example, you will submit the Justification Document.

Click the **Finish** button.
The Document Management page displays. Under View Edit Options you can view or edit the document.*

It should be noted if you are creating the document but are NOT the expert in the field for this request, you must click View Document button to print the form, obtain an original signature, scan the document and add the signed electronic document to the Justification Document by clicking the Add Attachments/Related Documents hyperlink to add the signed version before submitting for approval.

Click View Document button.

**NOTE:** If person who created the requisition is same as the Expert in Field, you do not need to click View Document (Steps 5-13 on pages 22-27), instead go to Step 14 on page 28.

* For instructions on how to edit the justification document, see topic Edit a Justification Document, beginning on page 30.

**TIP:** If a new window does not open upon clicking View Document button, try holding down the Ctrl key while clicking the View Document button until the new window opens.
If Word does not automatically open and display the Word version of the document, a new window opens with an XML version of the Justification Document.*

Click the Page icon in the browser and select Edit with Microsoft Office Word.

*Depending on the version of Microsoft Word you are using, the XML window may be skipped and you are taken directly to a new window with the document in Word.
Microsoft Word will open in a new window with the Justification Document in Word format.

Print the Document and obtain the Expert in Field’s signature. Scan the signed document into a PDF file and save to your computer.

**NOTE:** If person who created the requisition is same as the Expert in Field, you do not need to print, sign, scan, and attach the form.
The scanned document now needs to be added to the system.

On the Document Management page, click the **Add Attachments/Related Documents** hyperlink.

Click the **Upload a Document Attachment File** hyperlink.
10. Click Browse button.

11. Locate and select the file with the scanned signed document. Click **Open** button.
12 Click **Upload** button.

13 The newly added file appears in the list of Attachments.

**We strongly recommend you enter a Title for the attachment**, (i.e. “Version signed by expert”).

At this point, additional attachments can be attached by clicking the **Upload another Document Attachment File**, if there is other supporting information to include with the Justification.

Click **OK** button to return to Document Management page.
On the Document Management page, notice the link used to attach the file is now called **Modify Attachments/Related Documents**. This indicates a file has been attached.

Click **Submit for Approval** button in the middle column of the Review and Approval section to submit the Justification Document for approval.

**NOTE:** Approval of the Justification Document does not replace the regular Approver’s approval of the requisition.
The Document Approval Status page appears, showing the Document Approval Path. If the total amount of the request is over $100,000 and additional approver will appear in the approval path.

If desired, you can add any additional notes in the Approval Comments field.

Click the **Save** button.

The document is now available for procurement/contracting staff.

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**End of Create & Associate a Justification document for Existing Requisition topic.**
**Edit a Justification Document**

This topic takes you through how to edit a saved Justification Document.

**Navigation:** Supplier Contracts > Create Contracts and Documents > Document Management

1. Click the **Find an Existing Document** hyperlink.

2. Source Transaction should be Ad Hoc
   - SetID should be UOFMO
   - Document Type should be Justification Documents
   - In Request BU field, enter the Business Unit of the existing requisition associated to the Justification Document.
   - Enter the 10-digit Requisition ID
   - Click **Search** button.
3. Click on the hyperlink in the Document Keys column to access the saved Justification Document for the specified requisition.

The document is now checked out and the page changes to display Check in and Cancel Check Out buttons.

**TIP:** If a new window does not open upon clicking Edit Document button, try holding down the Ctrl key while clicking the Edit Document button until the new window opens.
When the Document Management page changes, a new window also opens to display the XML version of the Justification Document.

Click the **Page** icon in the browser and select Edit with Microsoft Office Word.
A new window opens with the Justification Document in Microsoft Word.

Make necessary changes to the information. Changes made to the document are tracked with Track Changes.

When finished, Save the document with the file name it is automatically assigned – do NOT change the file name. Make note of where it is saved and its name.

Close the Word program and close the window with the XML version.
8. **Click Check In button** to replace the Justification Document with the newly edited version.

9. **Check In Document page displays.**
   - **Click OK button.**
10. Click the **Browse** button to locate your file.

11. Locate and select the file for the edited document. Click **Open** button.
12. Click **Upload** button.

13. You are returned to the Document Management page.

To review version history, click **Document Version History** hyperlink.
The Document History page shows date, time and who last modified the document.

To return to Document Management page, click Return to Document Management hyperlink.

End of Edit a Justification Document topic.