Web Requisition User's Guide

NIAGARA UNIVERSITY

Rev 06.16.10

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Introduction

Web Requisitions provides users with an easy and paperless method to requisition goods and services. In the past, users would create paper requisitions, submit them for approval to your department head and then send the paperwork to Business Services.

Web Requisitions does away with the paper and the paper trail. Users can create a requisition on-line, and the application will send an email notification to the department head or the designated approver. Once the requisition is approved, Business Services will be able to turn the requisition into a purchase order.

In the past, users may have called Business Services to check the status of a requisition. With Web Requisitions, users can now look on-line to view the status. Users will be able to determine if the requisition has been approved and if a purchase order has been created for the requisitioned items.

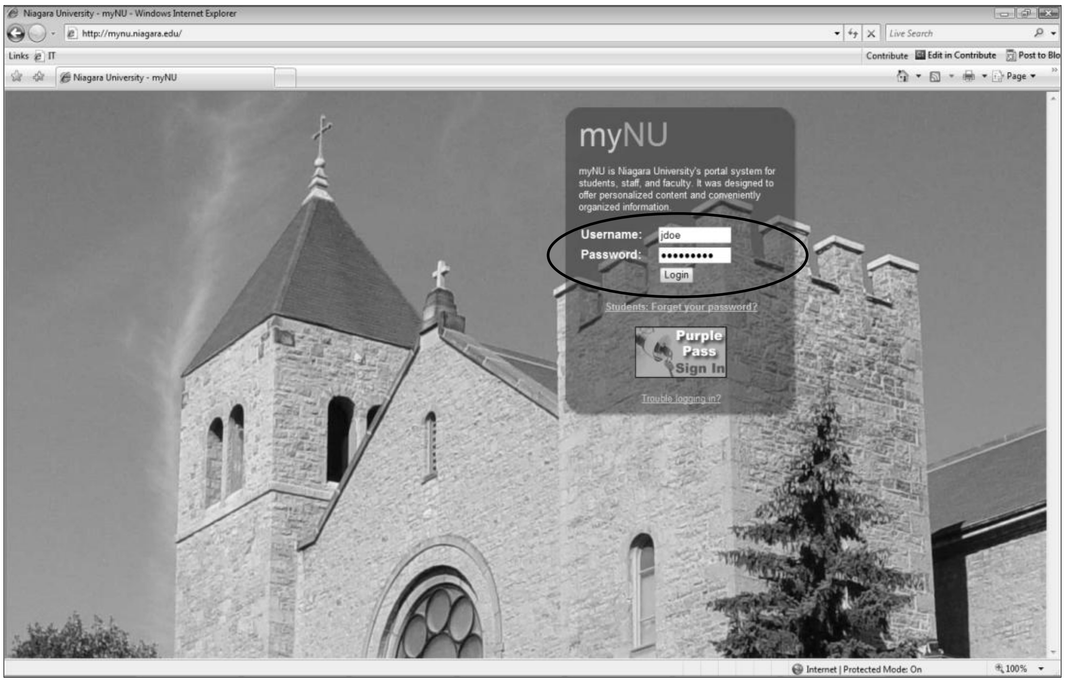
Logging into Web Advisor

You will be able to access Web Advisor from any computer that has access to the internet.

1. Using your internet browser (Internet Explorer, Firefox, etc.), navigate to myNU at **http://mynu.niagara.edu**

2. **Note:** You may find it helpful to add this site to your favorites for future use/access.

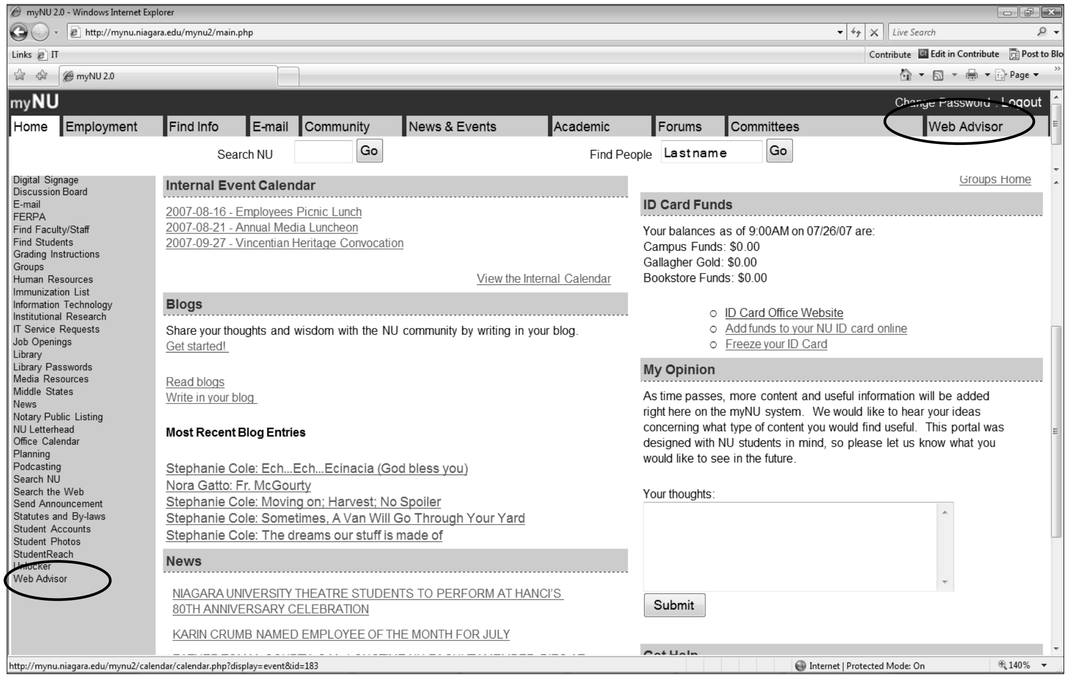
- The **myNU login screen** will display.



3. Enter your **Username** and **Password**, and then click the **Login** button.

Logging into Web Advisor (continued)

- The **myNU Home page** will display.

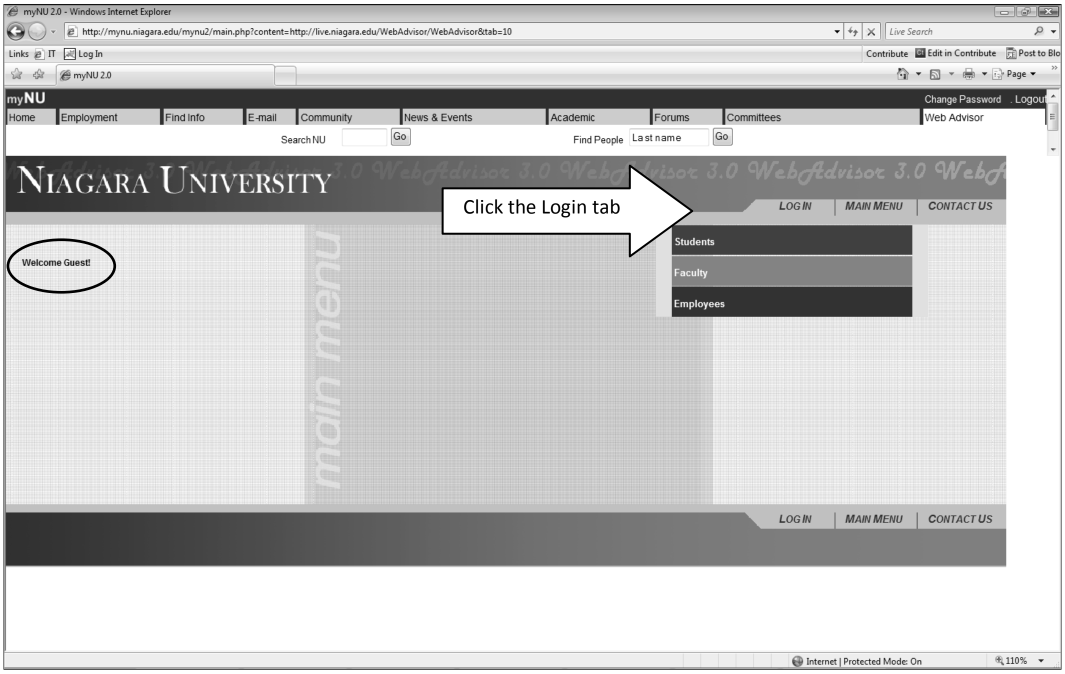


4. From the navigation bar on the left, click to select **Web Advisor**.

- Alternately, you may click the **Web Advisor** tab in the upper right of the screen.

Logging into Web Advisor (continued)

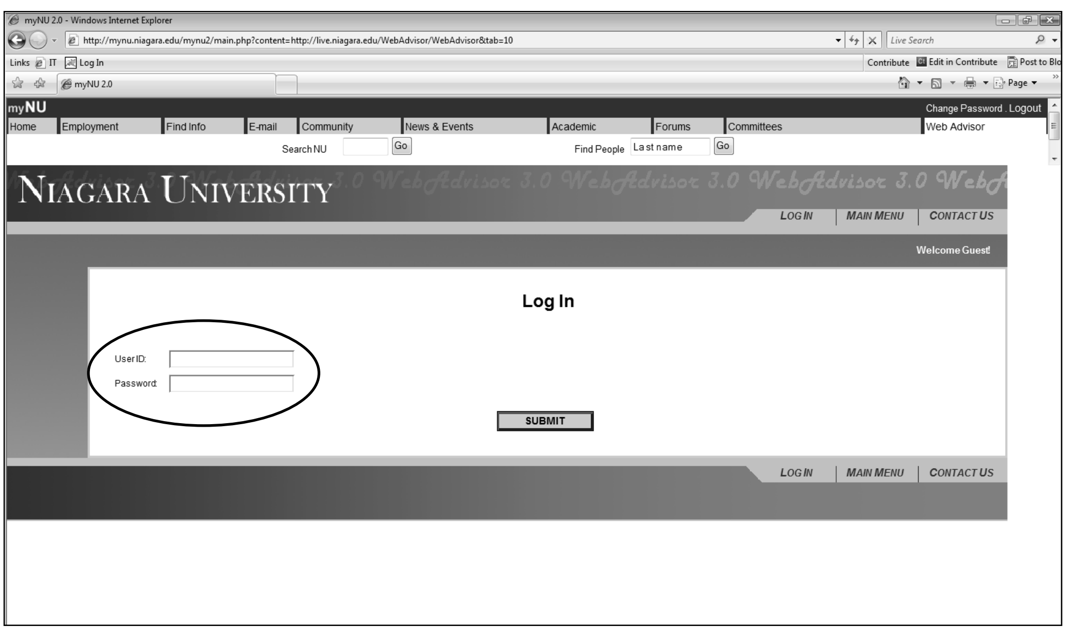
- The **Web Advisor page** will display. Note that “Welcome Guest” is displayed.



5. Click the **Log In** tab.

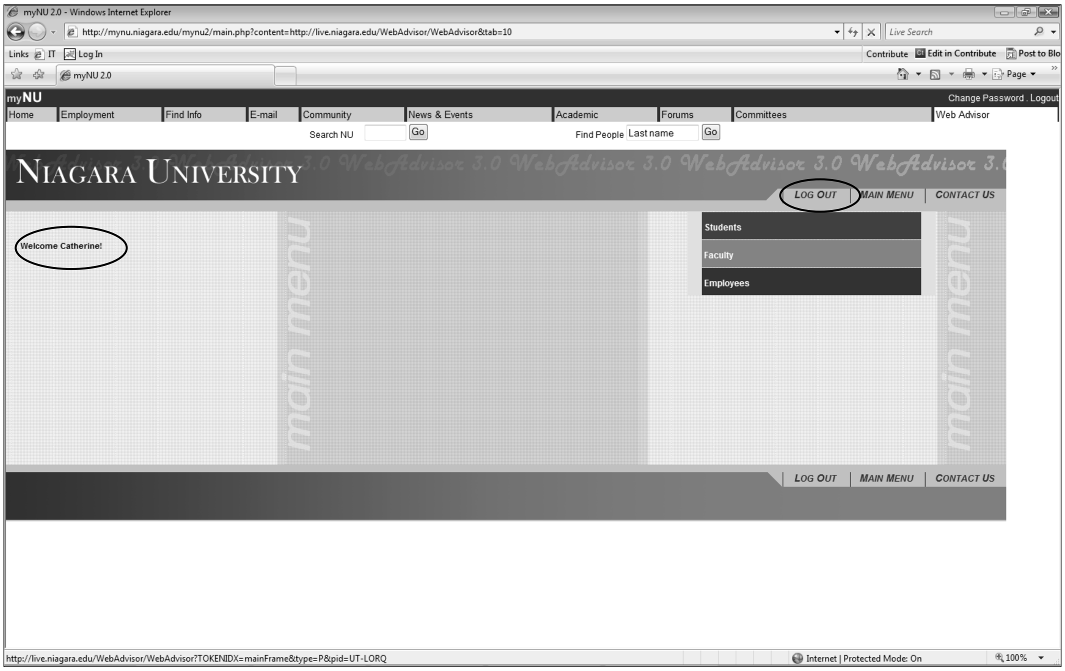
- The **Web Advisor Log in** screen displays.

6. Enter the same **UserID** and **Password**, and then click the **Submit** button.



Logging into Web Advisor (continued)

- The **Web Advisor** page redisplays. Notice that your name now appears in the Welcome Message, and the Log Out tab displays.

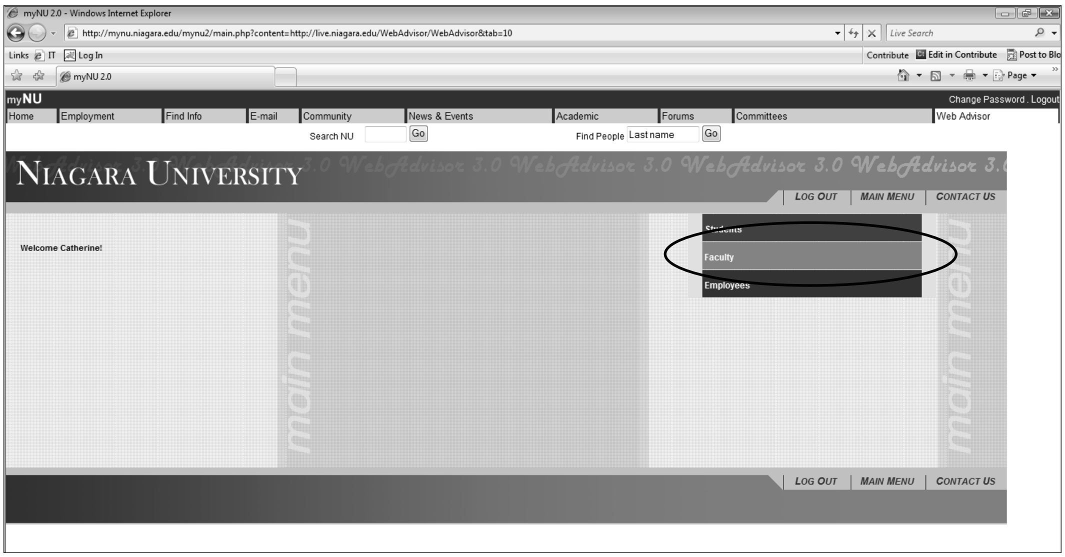


Note: If the Welcome Message still displays "Guest" and the Log In tab is still displayed, then please try logging in again.

Web Requisitions

Once you have successfully logged into Web Advisor, you will be able to navigate to either the Faculty or Employee sub-menus (based on your level of employment).   From the Faculty and Employee menus, you will be able to access the GL Account(s)-Select and GL Account(s)-Summary options.

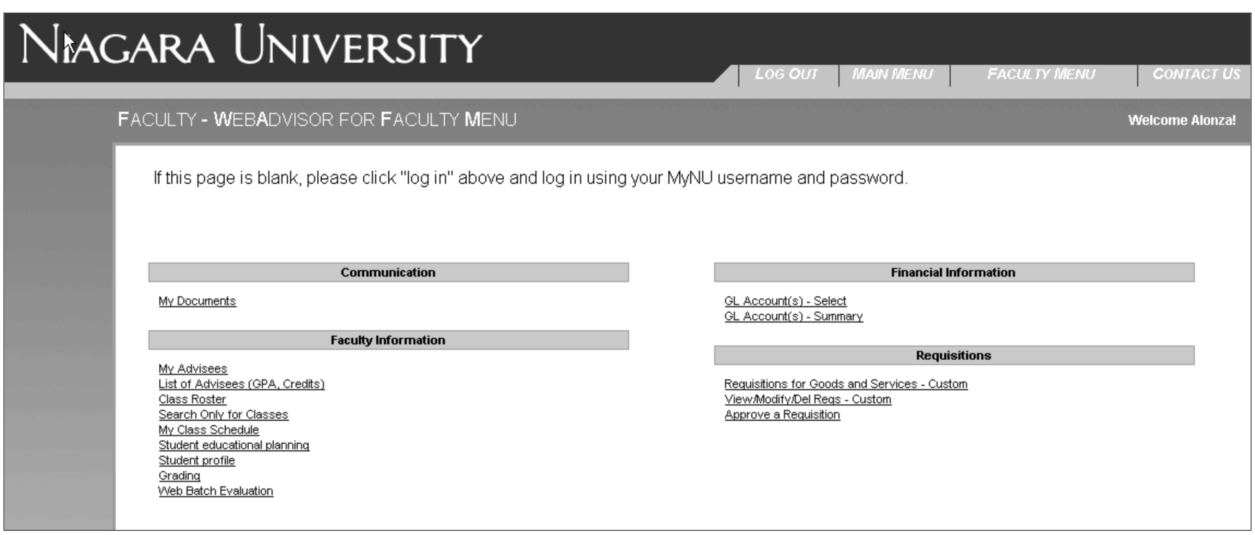
Web Advisor Faculty Menu



To navigate to the Faculty menu, click on **Faculty** button.

- The **Faculty** menu displays.

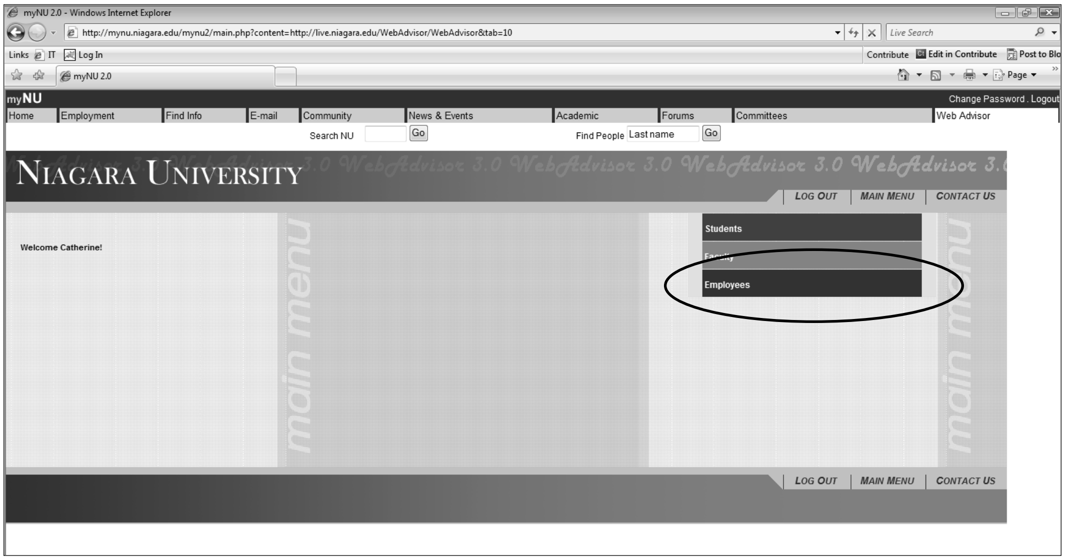
  Note: The page appearance may vary as new Web Advisor features become available.



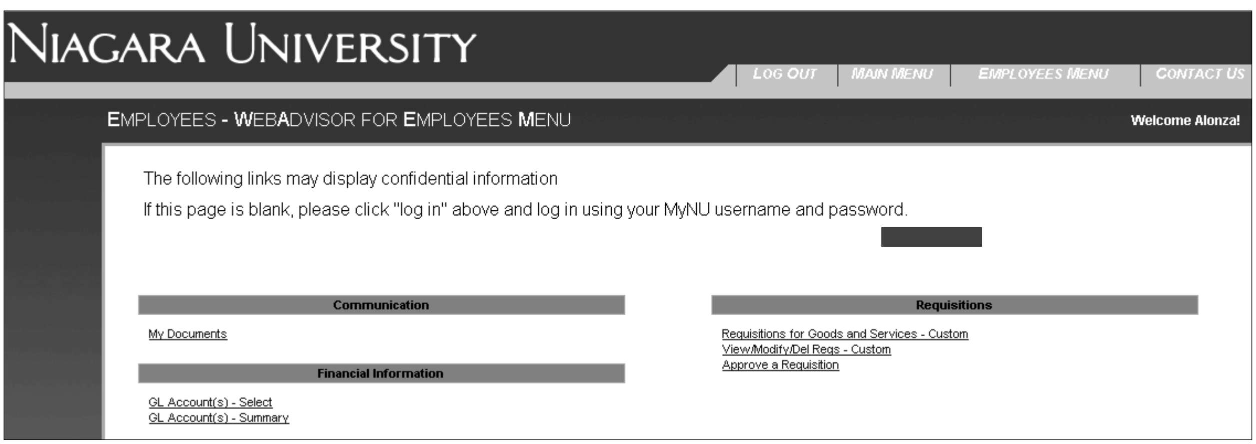
Web Requisitions (continued)

Web Advisor Employees Menu

To navigate to the Employees menu, click the **Employees** button.



- The **Employees** menu displays.



Note: **The page appearance may vary as new Web Advisor features become available.**

Web Requisitions

Whether you selected the Faculty or Employees menu, both of the menus contain the section "Financial Information".

Under "Financial Information" the following options are available:

Requisition for Goods and Services - Custom

View/Modify/Del Reqs – Custom

Approve a Requisition

Use the 'Requisition for Goods and Services – Custom' option to create a new requisition.

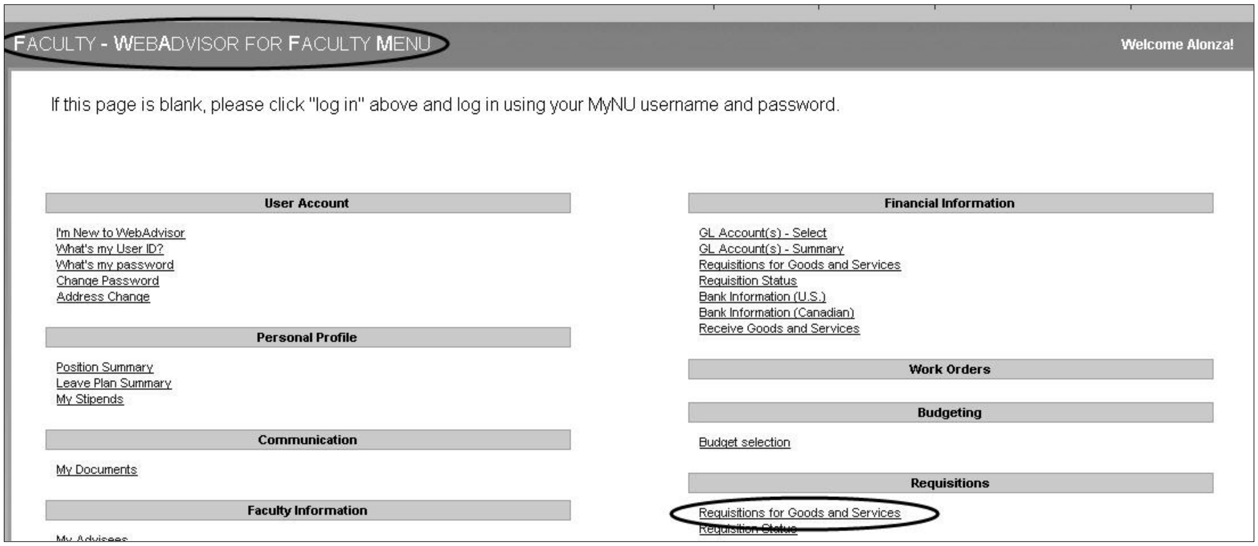
Use the 'View/Modify/Del Reqs – Custom' option to view previously created web requisitions, modify requisitions and delete requisitions.

Use 'Approve a Requisition' option to approve requisitions.

All of these options are covered in detail in this document.

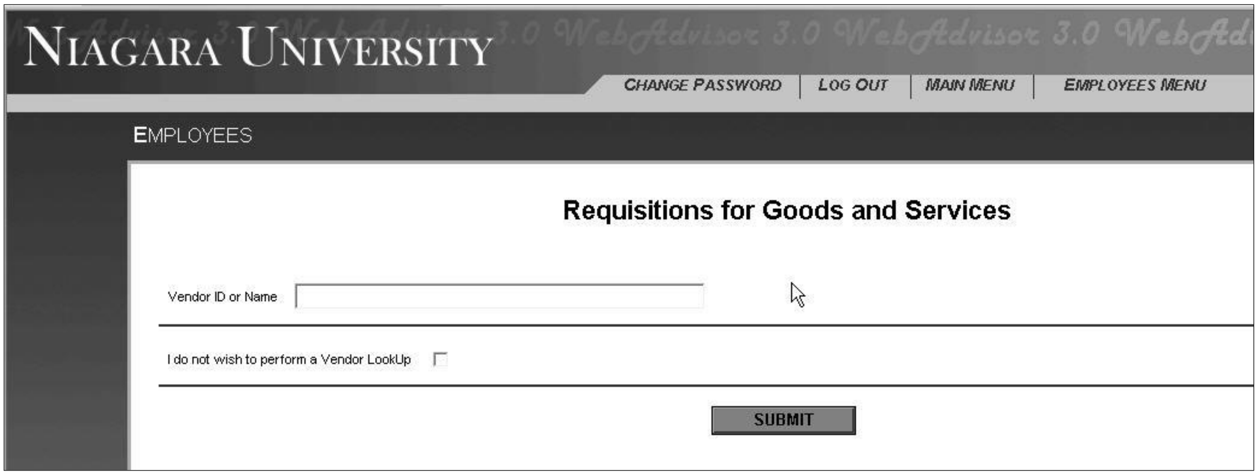
Requisition for Goods and Services

From the Faculty or Employees menu, under the **Requisitions** section, click the **Requisitions for Goods and Services - Custom** link.



Vendor Lookup

- The **Requisitions for Goods and Services** – **Custom** screen displays. On this page you have the option to enter to search for a vendor by entering in the Vendor ID or Vendor Name, or you can choose not to search for a vendor.

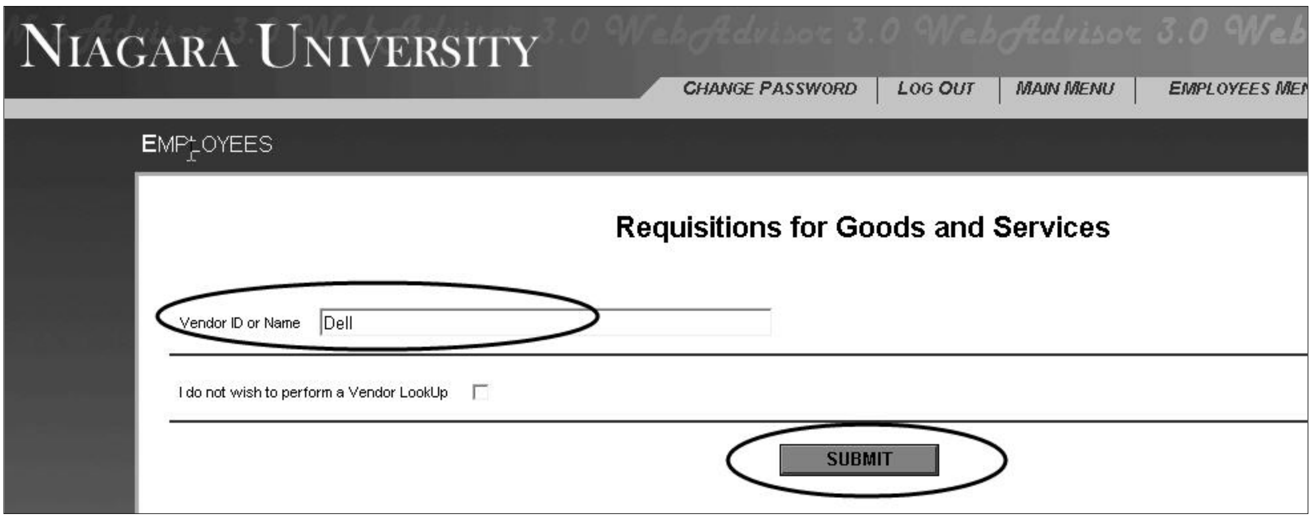


Vendor Lookup (continued)

Enter the name of the vendor in the Vendor ID or Name field. In the example, Dell has been entered into the field.

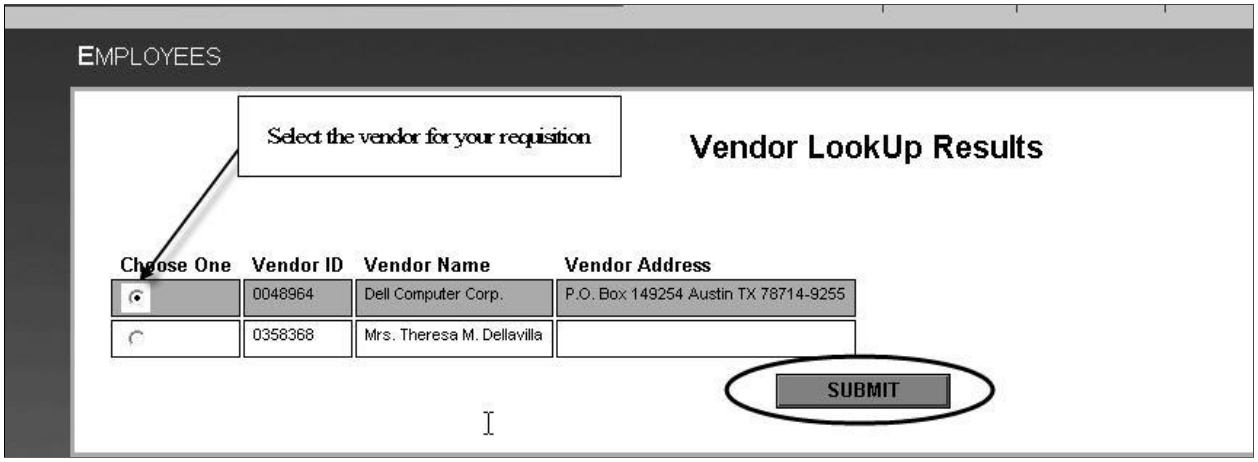
Click the Submit button.

- The Vendor Lookup Results Screen will be displayed.



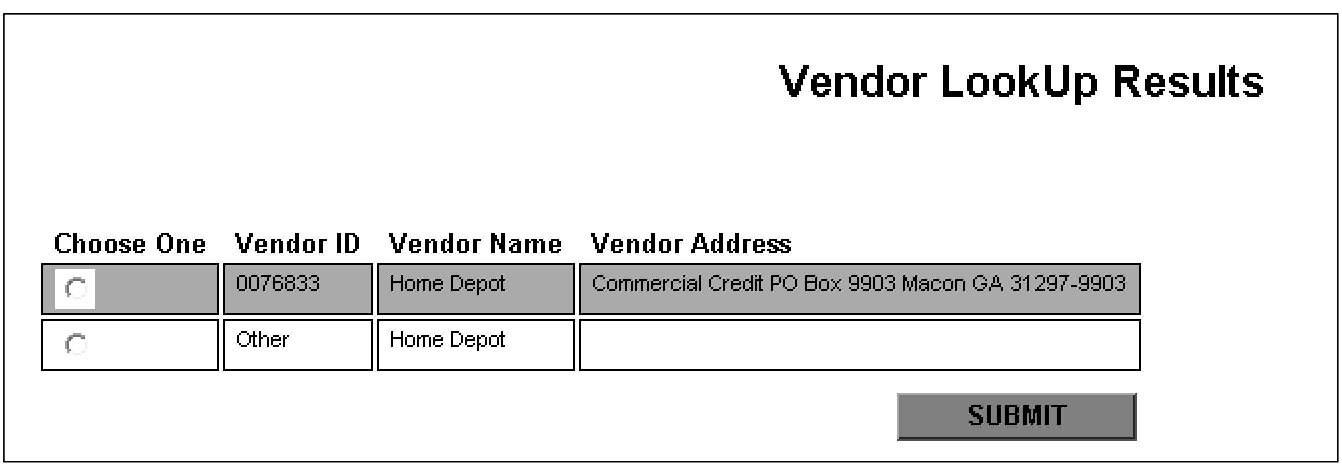
Vendor Lookup Results

The **Vendor Lookup Results Screen** will display a list of vendors based on the data that you have entered in the Vendor Lookup Screen that was accessed from the Requisition for Goods and Services screen.



- Select the vendor from the list and then press the submit button.
- The Requisition Entry form will be displayed

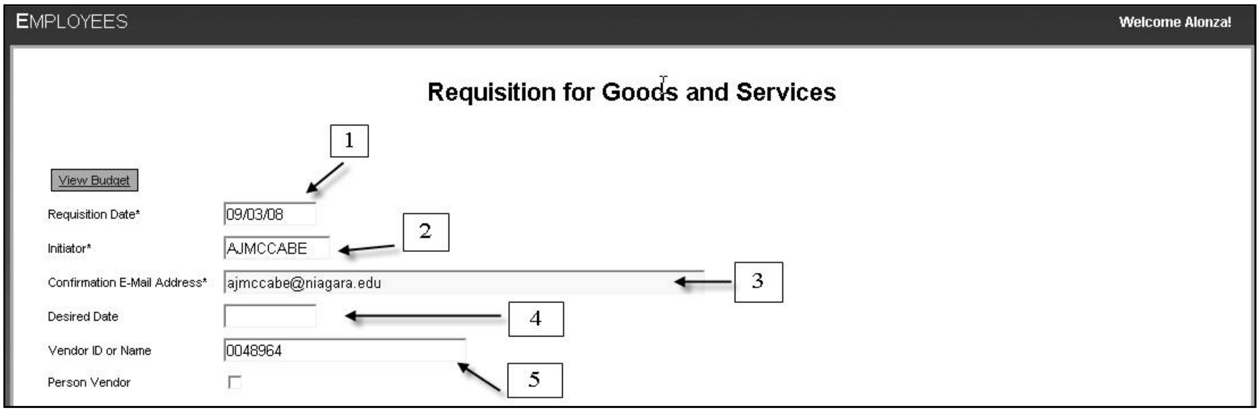
If the Vendor does not appear on the Results page and it is a new vendor, you will have the option to select the option of 'other'. This will alert Business Services that this vendor is new.



Requisition Entry

The Requisition Entry form will allow you to enter information about the items you wish to purchase. The screen is divided into three sections.

- The first section displays information about the vendor, the requestor and the desired date.



- Requisition Date [1] is always set to the current date.

- Initiator [2] will automatically default to your user id. If you are entering a requisition for another person then you must enter the user id of the person who is wants these goods and services.

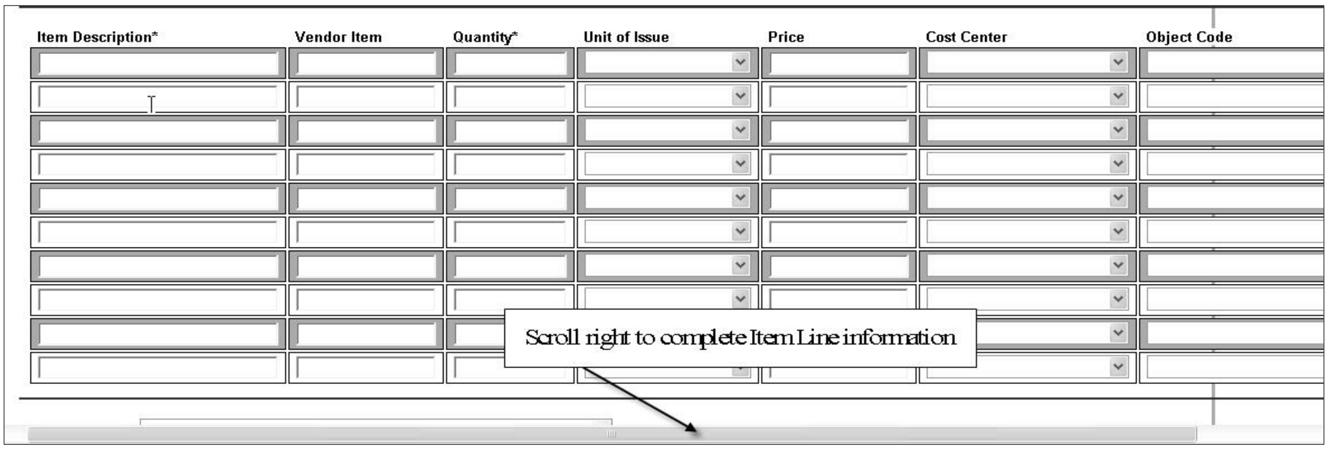
- Confirmation E-mail Address [3] will automatically default to your email address. You can add additional email addresses as well – just make sure that each email address is separated by a semi-colon (;) or comma (,).

- Desired Date [4] will tell the Business Services Office when you would like to receive your goods and services.

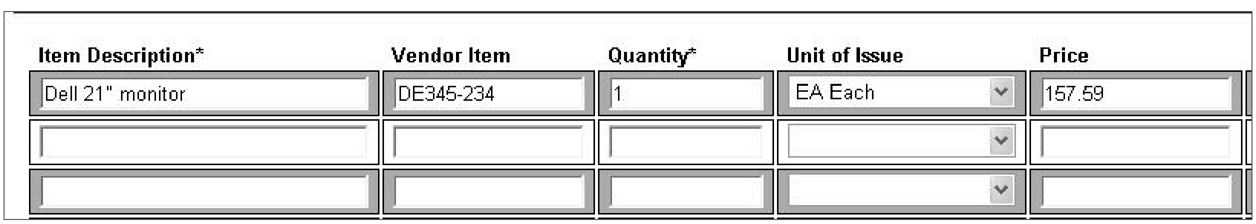
- Vendor ID or Name [5] displays the ID of the vendor picked from the Vendor Lookup Results form.

Requisition Entry (continued)

- The second section displays the Item line information, such as the Item Description, quantity, price and GL acct information. You may find that the Item lines extend beyond the window of your browser, to see all of the fields simply use the horizontal scroll bar to scroll right.



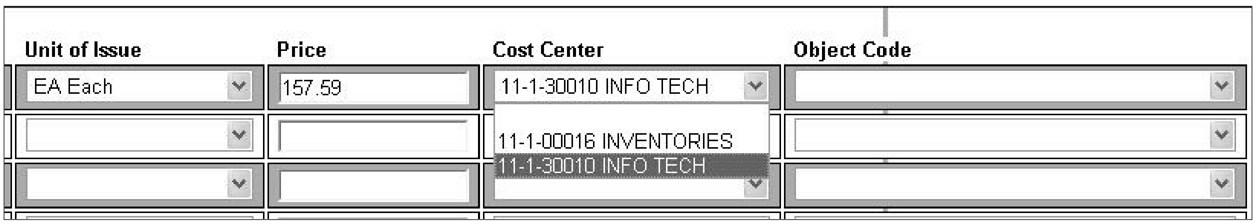
- Use these fields to enter information about the goods and services you wish to purchase. In the example below, I have entered information in the Item Description, Vendor Item, Quantity, Unit of Issue and Price fields. Please note that the Item Description, Quantity, and Price are required fields.



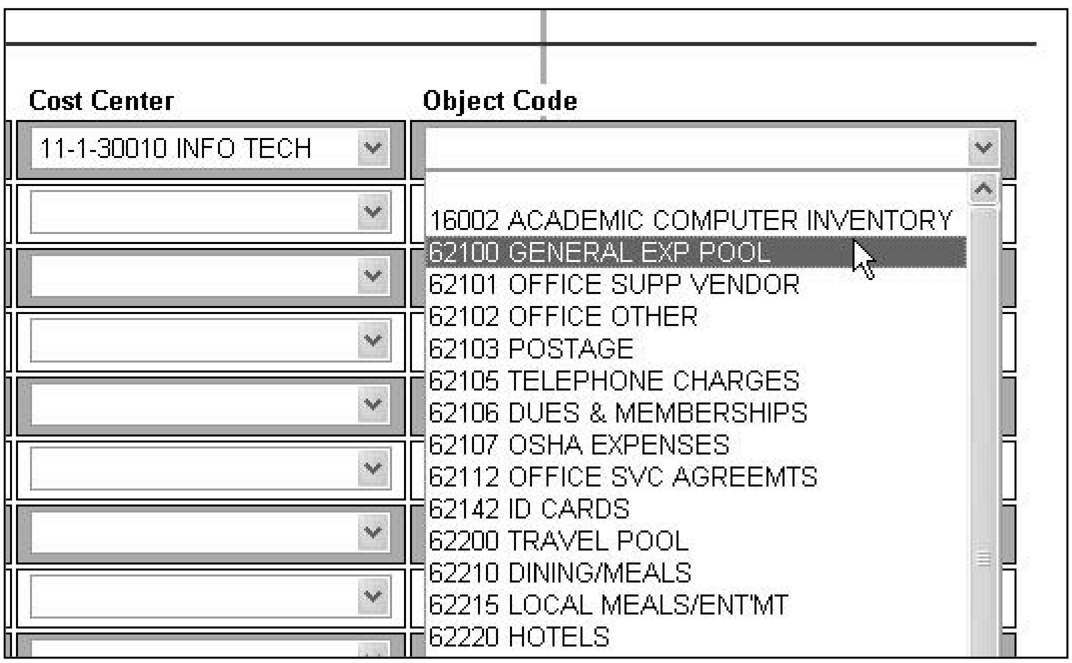
Requisition Entry (continued)

- The GL account information has been broken down into two components. One component is called the Cost Center. The Cost Center is comprised of the Fund, Source and Department codes; the Object Code is made up of the GL objects. When selecting the appropriate GL account to use on your requisition you must choose the Cost Center and the Object Code. The GL information displayed in the boxes in based on your GL security.

- Select the Cost Center associated with the appropriate GL account you wish to use. In the example below, I choose the Cost Center of 11-1-30010.



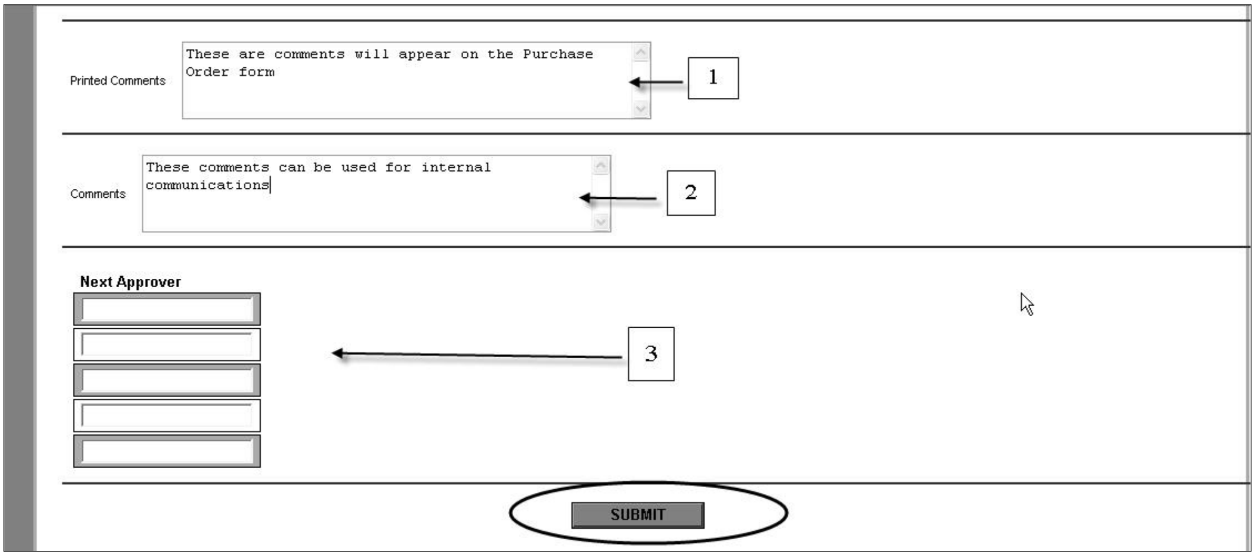
- Select the Object Code associated with the appropriate GL account you wish to use. In the example, below I choose the Object Code of 62100.



- Please note: You can only enter 15 lines on the Web Requisition form.

Requisition Entry (continued)

Once you have completed entering all of you requisition items, you have the option of entering comments. The Web Requisition Entry screen allows you to enter two types of comments:



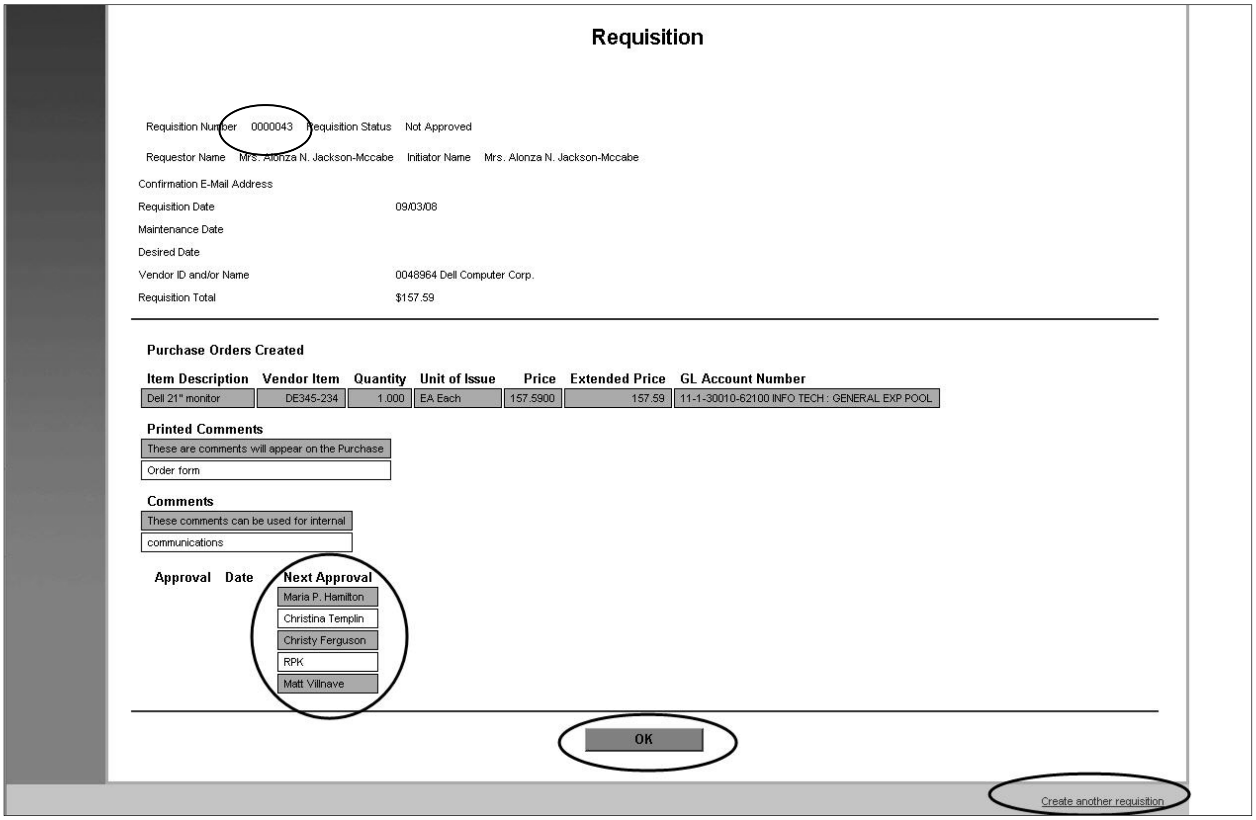
Printed Comments [1] will appear on the Purchase Order and Comments [2] are used as a form of internal communications to the Business Services Department.

Once you have entered all of your information simply press the SUBMIT button and Colleague will save the requisition and generate a confirmation letter that will be sent to you. If this requisition requires approvals then Colleague will send all of the appropriate approvers an email notification.

* Please note that the system will determine who the next approvers, you do not need to enter data into the Next Approver fields [3]

Requisition Confirmation Page

After the requisition has been submitted, WebAdvisor will display the Requisition Status screen. In addition to the information entered on the previous screen, this screen will display the requisition number as well the ids of any approvers that need to approve the requisition.



On the requisition confirmation page, you have the option of pressing the submit button to exit or pressing the link ‘Create another requisition’ to enter more requisitions.

Email Confirmation

After the requisition has been submitted, Colleague will send out an email confirmation notice to the requestor, next approvers and business services. The confirmation email will have the subject heading of "Requisition for Goods and Services Confirmation", the notification email will have the subject heading that included the text "Approval needed for Requisition" and the requisition number.

The text of both emails contains the same information (below is a snippet of an email message generated from Colleague).

```
Subject: Requisition for Goods and Services Confirmation

Requisition Number      0000043

Requisition Status      Not Approved

Requestor Name          Mrs. Alonza N. Jackson-Mccabe

Initiator Name          Mrs. Alonza N. Jackson-Mccabe

Requisition Date        09/03/08

Desired Date

Vendor ID and/or Name   0048964 Dell Computer Corp.

AP Type

Requisition Total       $157.59

Item 1

Item Description      Dell 21" monitor

Vendor Item           DE345-234

Quantity              1.000

Unit of Issue         EA Each

Price                 157.5900

Extended Price        157.59

GL Account Number     11-1-30010-62100 INFO TECH : GENERAL EXP POOL
```

View/Modify/Del Reqs

You can view the status of your requisitions by clicking on the View/Modify/Del link (found on the WebAdvisor Faculty and Employees Menu).

Requisitions for Goods and Services - Custom
View/Modify/Del Reqs - Custom
Approve a Requisition

WebAdvisor will display a list of all your requisitions and their corresponding statuses. A requisition can have three different statuses; Not approved, Outstanding (approved), PO Created.

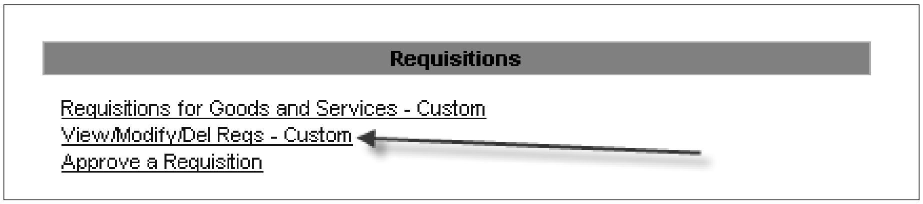
View/Modify/Del Reqs - Custom

Requisition Number	Requisition Date	Status	Purchase Orders Created	Requestor Name	Initiator Name	Vendor ID	Vendor Name	Total Amount			
0000376	05/05/10	Not Approved		Mrs. Aj N. McCabe	Mrs. Aj N. McCabe	0528231	Best Buy Gov, Llc	15.00	Receive	Modify	Delete
0000375	05/05/10	Outstanding		Mrs. Aj N. McCabe	Mrs. Aj N. McCabe	0528231	Best Buy Gov, Llc	5.00	Receive	Modify	Delete
0000374	05/05/10	Not Approved		Mrs. Aj N. McCabe	Mrs. Aj N. McCabe	0528231	Best Buy Gov, Llc	12.00	Receive	Modify	Delete
0000373	05/05/10	Not Approved		Mrs. Aj N. McCabe	Mrs. Aj N. McCabe	0528231	Best Buy Gov, Llc	15.00	Receive	Modify	Delete
0000372	05/05/10	Not Approved		Mrs. Aj N. McCabe	Mrs. Aj N. McCabe	[illegible]28231	Best Buy Gov, Llc	25.01	Receive	Modify	Delete
0000371	05/05/10	Not Approved		Mrs. Aj N. McCabe	Mrs. Aj N. McCabe	0528231	Best Buy Gov, Llc	26.00	Receive	Modify	Delete
0000369	04/09/10	Outstanding		Mrs. Aj N. McCabe	Mrs. Aj N. McCabe		B&H Photo	19.10	Receive	Modify	Delete
0000363	03/23/10	PO Created	P0028127	Mrs. Aj N. McCabe	Mrs. Aj N. McCabe		test vendor	4.00	Receive	Modify	Delete

To view detail information about requisition, click on the requisition number.

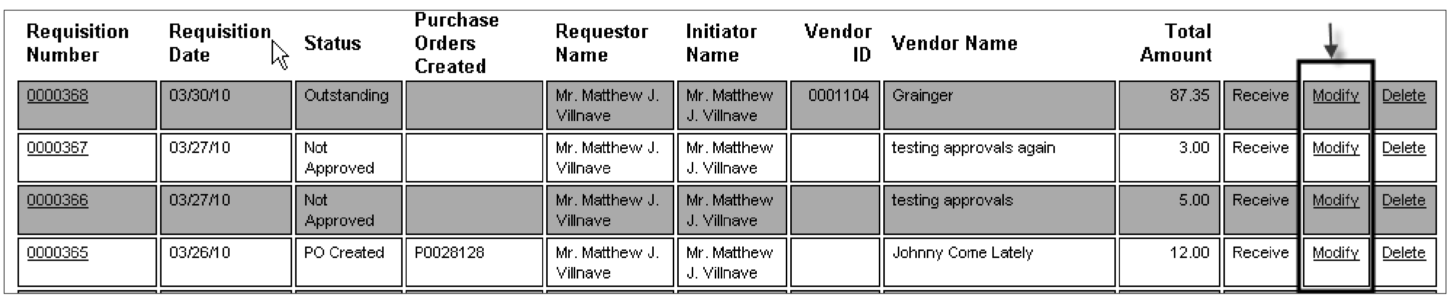
Modifying a Requisition

You can modify any requisitions that has not been turned into a Purchase Order by clicking on the Employees (or Faculty) menu.



- Click on the ‘View/Modify/Del Reqs - Custom’ Hyperlink

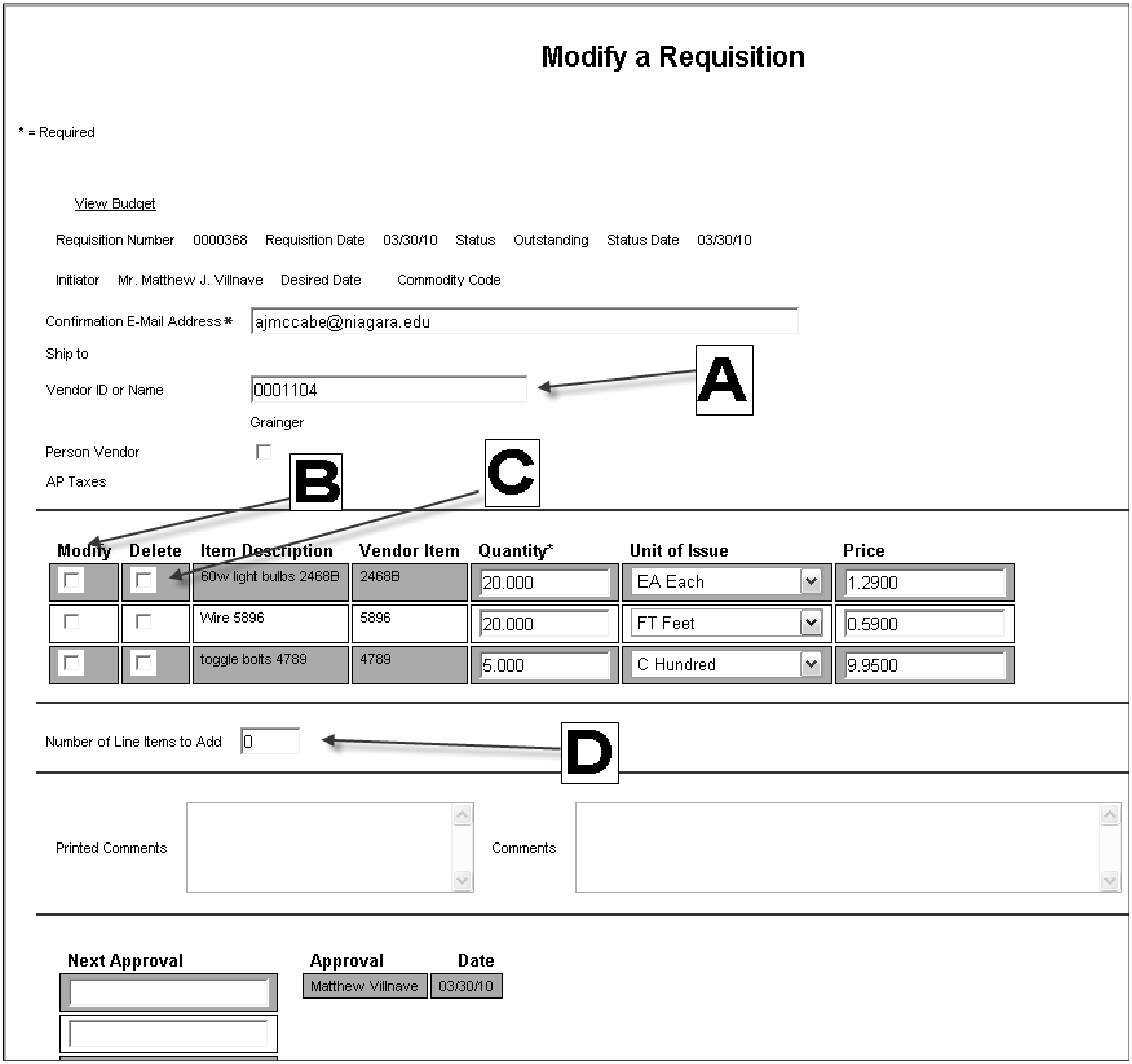
Web Advisor will open the View/Modify/Del Requisitions form. The form will display all of the requisitions that you created. To modify a requisition, simply click the ‘Modify’ hyperlink next to the appropriate requisition. The process will open the Modify a Requisition form.



Requisition Number	Requisition Date	Status	Purchase Orders Created	Requestor Name	Initiator Name	Vendor ID	Vendor Name	Total Amount			
0000368	03/30/10	Outstanding		Mr. Matthew J. Villnave	Mr. Matthew J. Villnave	0001104	Grainger	87.35	Receive	Modify	Delete
0000367	03/27/10	Not Approved		Mr. Matthew J. Villnave	Mr. Matthew J. Villnave		testing approvals again	3.00	Receive	Modify	Delete
0000366	03/27/10	Not Approved		Mr. Matthew J. Villnave	Mr. Matthew J. Villnave		testing approvals	5.00	Receive	Modify	Delete
0000365	03/26/10	PO Created	P0028128	Mr. Matthew J. Villnave	Mr. Matthew J. Villnave		Johnny Come Lately	12.00	Receive	Modify	Delete

Modifying a Requisition (continued)

This form will allow you to change the information on the requisition. This documentation will focus on four major types of modifications; changing a vendor [A], changing information about the item [B], deleting items [C] and adding new items [D].



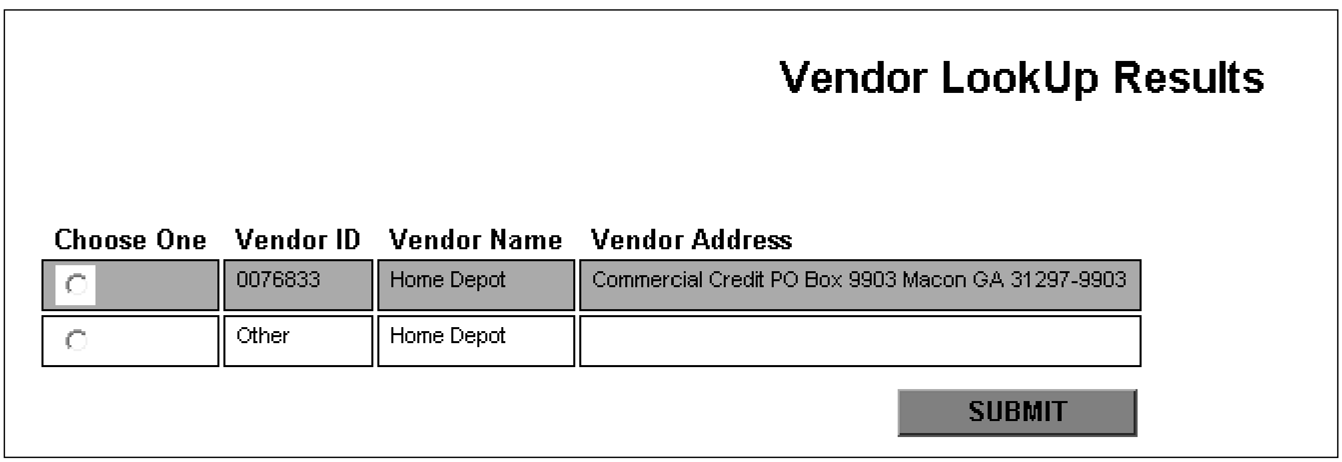
Note – you cannot modify a requisition that has been turned into a Purchase Order. If the Purchase Order needs to be changed, please contact Business Services.

Modifying a Requisition – Changing a Vendor Name

A - Changing the Vendor Name

- To change the vendor assigned to this requisition, simply type in the new Vendor Name or ID press the submit button located at the bottom of the screen.

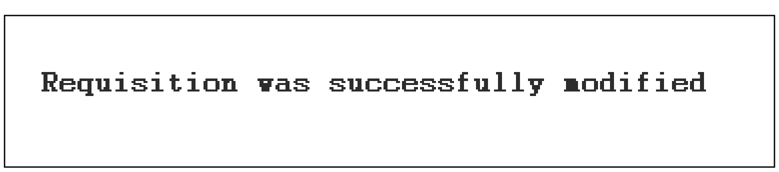
Web Advisor will open the Vendor Lookup Results form. This form will display a list of vendors.



- Select the appropriate Vendor and press the SUBMIT button.

***Note:** If the vendor entered is not displayed on the form <u>and</u> it is a new vendor, than choose the record that has the Vendor ID of **'Other'**.

After pressing the submit button the following message will appear:



The process will send an email notification to the user and to Business Services.

Modifying a Requisition – Changing an Item Line

B –Modifying an Item

There are two methods in which to modify the items on the requisitions.

- Method 1:

Change the **Quantity**, **Unit of Issue** and **Price** displayed on the Modify a Requisition form.

Modify	Delete	Item Description	Vendor Item	Quantity*	Unit of Issue	Price
		60w light bulbs 2468B	2468B	20.000	EA Each	1.2900
		Wire 5896	5896	20.000	FT Feet	0.5900
		toggle bolts 4789	4789	5.000	C Hundred	9.9500

Modify	Delete	Item Description	Vendor Item	Quantity*	Unit of Issue	Price
		60w light bulbs 2468B	2468B	10.000	EA Each	1.2900
		Wire 5896	5896	20.000	FT Feet	0.5900
		toggle bolts 4789	4789	5.000	C Hundred	9.9500

Once the information has been modified, press the submit button.

After pressing the submit button the following message will appear:

Requisition was successfully modified

The process will send an email notification to the user and to Business Services.

Modifying a Requisition – Changing an Item Line (continued)

- Method 2:

a) Change the Item Line information on the Requisition Item Line form.

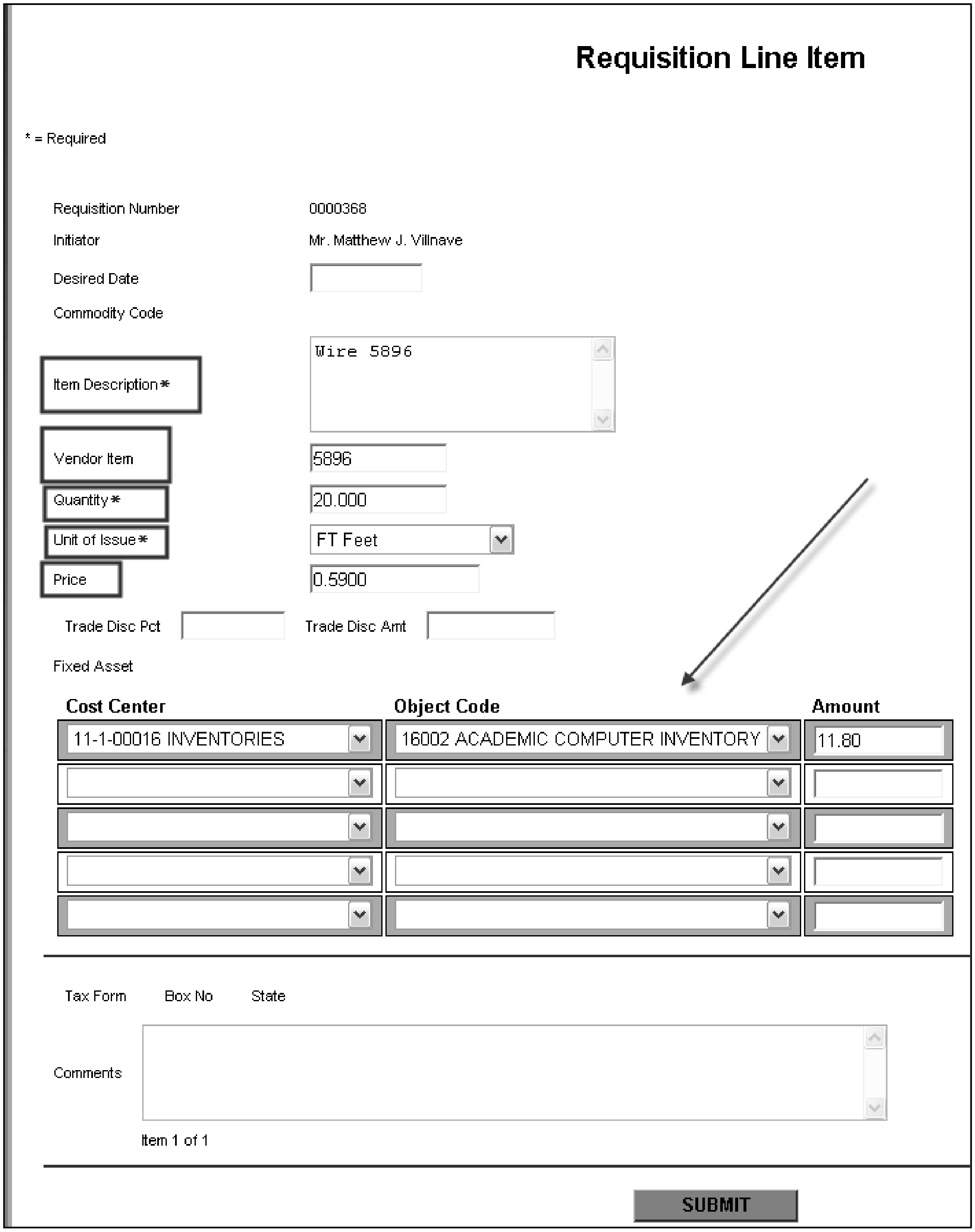
To access the Requisition Item Line form, check the item on the table that needs to be modified and press the submit button.

Modify	Delete	Item Description	Vendor Item	Quantity*	Unit of Issue	Price
☐	☐	60w light bulbs 2468B	2468B	10.000	EA Each	1.2900
☑	☐	Wire 5896	5896	20.000	FT Feet	0.5900
☐	☐	toggle bolts 4789	4789	5.000	C Hundred	9.9500

The process will open the Requisition Item Line form.

Modifying a Requisition – Changing an Item Line (continued)

There are a number of fields on the Requisition Line form that can be modified. These fields include the Item Description, Vendor Item Id, Quantity, Unit of Issue, Price, and GL Account Information.



Requisition Line Item

* = Required

Requisition Number	0000368
Initiator	Mr. Matthew J. Villnave
Desired Date	
Commodity Code	
Item Description*	Wire 5896
Vendor Item	5896
Quantity*	20.000
Unit of Issue*	FT Feet
Price	0.5900
Trade Disc Pct	
Trade Disc Amt	
Fixed Asset	

Cost Center	Object Code	Amount
11-1-00016 INVENTORIES	16002 ACADEMIC COMPUTER INVENTORY	11.80

Tax Form Box No State

Comments

Item 1 of 1

SUBMIT

Modifying a Requisition – Changing an Item Line (continued)

This form will also allow the user to split the cost of the item across two or more GL accounts.

Important Notes about this form:

1. When changing the Item Description, do not add the Vendor Item ID to the description. Once the requisition is saved, the Vendor Item ID information is added to the end of the Item Description.

2. When changing the Vendor Item ID make sure that the Vendor Item Id is removed from the Item Description field.

3. The Comments on the Item Line form are for information purposes only – they are not printed on the Purchase Order.

4. When changing the Quantity and Price for an Item that is not split across two or more GL accounts, the user does not need to enter the total amount. However, if the cost of the Item is being split across multiple accounts, than the total of the GL amounts assigned must equal the amount of the items purchased.

Cost Center	Object Code	Amount
11-1-00016 INVENTORIES	16002 ACADEMIC COMPUTER INVENTORY	5.80
11-1-30140 MEDIA RESOURCES	62100 GENERAL EXP POOL	6.00

5. When changing information GL information on the Item Line form, the requisition will require re-approval.

Modifying a Requisition – Changing an Item Line (continued)

Once the information has been modified, press the submit button.

After pressing the submit button the following message will appear:

Requisition was successfully modified
The changes to the line item require re-approval of the requisition.

The user can approve the requisition on the 'Approve a Requisition' form, if they have sufficient authorization. If not than an email notification will be sent to the next approver.

The process will send an email notification to the user and to Business Services.

Modifying a Requisition – Deleting an Item Line

C – Deleting an Item

To delete an item, check the item on the table that corresponds to the item that needs to be delete, and then press the submit button.

Modify	Delete	Item Description	Vendor Item	Quantity*	Unit of Issue	Price
☐	☐	60w light bulbs 2468B	2468B	10.000	EA Each	1.2900
☐	☐	Wire 5896 5896	5896	20.000	FT Feet	0.5900
☐	☑	toggle bolts 4789	4789	5.000	C Hundred	9.9500

After pressing the submit button the following message will appear:

Requisition was successfully modified

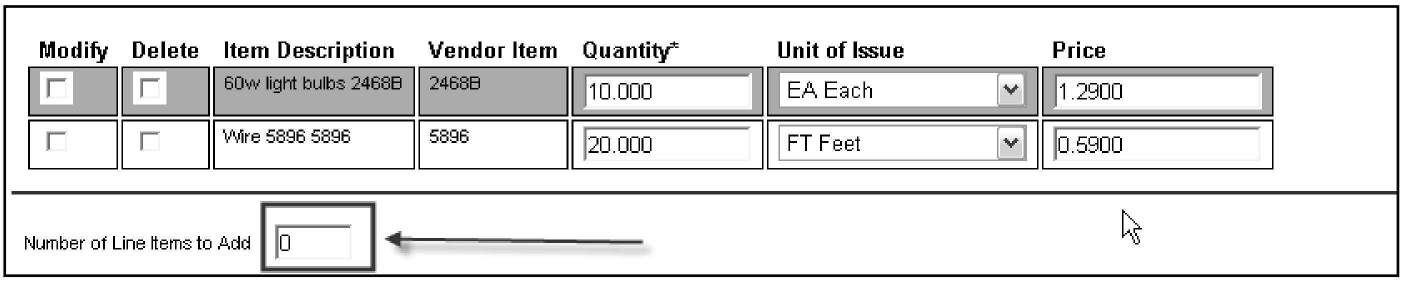
The process will send an email notification to the user and to Business Services.

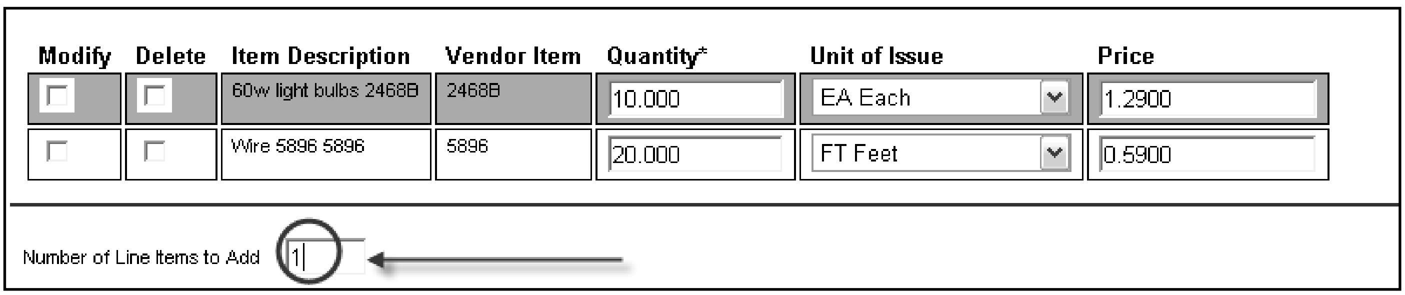
Note: Depending on the status of the requisition, the requisition may require re-approval.

Modifying a Requisition – Adding Item Lines

D – Adding Additional Item Lines

Enter the number of item lines to add to the requisition in the "Number of Line Items to Add" field and press the Submit button.

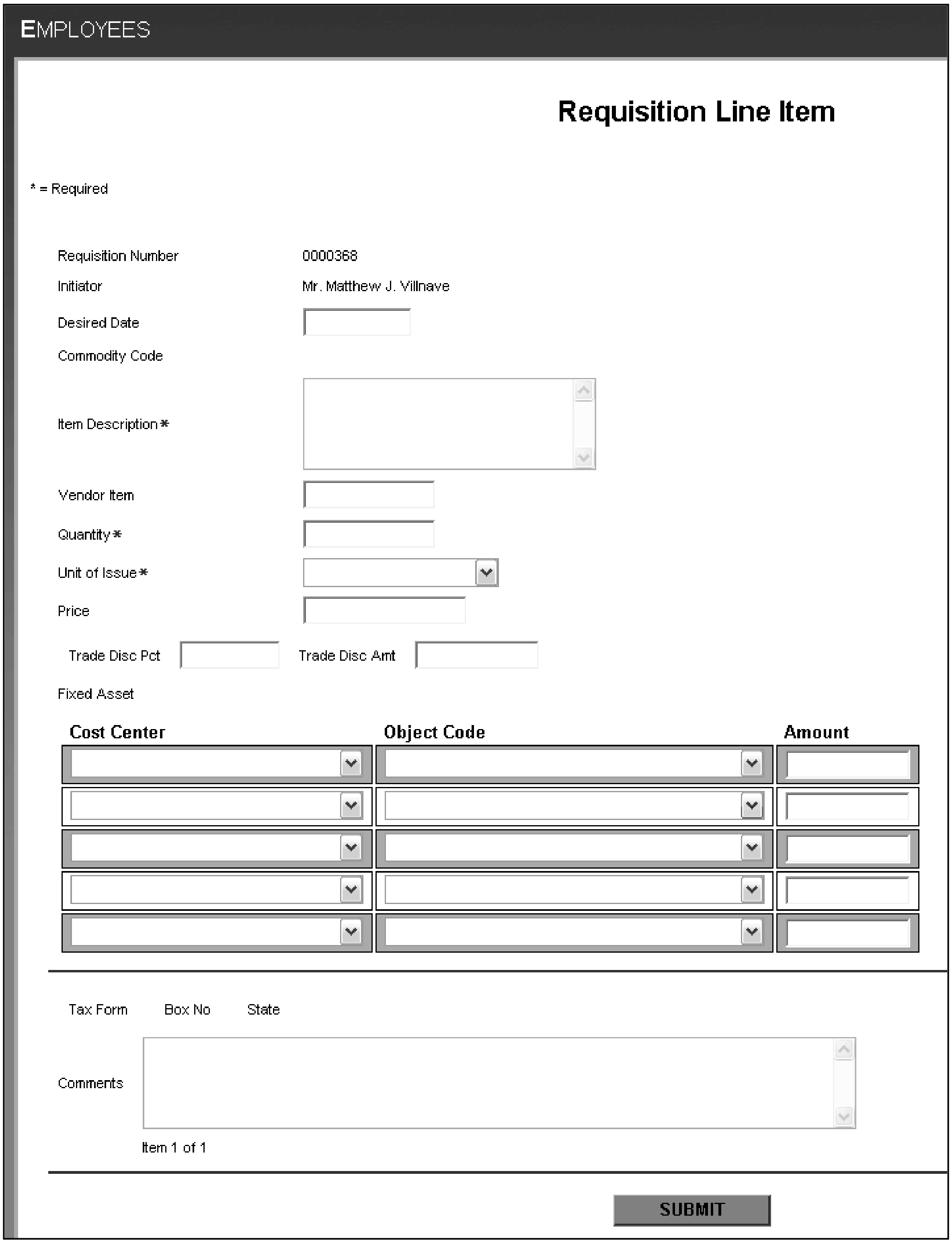




*** Note:** The maximum number of lines is 99.

Modifying a Requisition – Adding Item Lines (continued)

Once the submit button is pressed, the process will open the Requisition Line Item form.


EMPLOYEES

Requisition Line Item

* = Required

Requisition Number 0000368

Initiator Mr. Matthew J. Villnave

Desired Date

Commodity Code

Item Description *

Vendor Item

Quantity *

Unit of Issue *

Price

Trade Disc Pct Trade Disc Amt

Fixed Asset

Cost Center	Object Code	Amount

Tax Form Box No State

Comments

Item 1 of 1

SUBMIT

Modifying a Requisition – Adding Item Lines (continued)

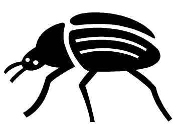
Once the information the new item information has been entered, press the submit button.

After pressing the submit button the following message will appear:

```
Requisition was successfully modified
Adding a line item requires re-approval of the requisition.
```

The user can approve the requisition on the 'Approve a Requisition' form, if they have sufficient authorization. If not than an email notification will be sent to the next approver.

The process will send an email notification to the user and to Business Services.



Bug Alert

***** The View/Modify/Del Reqs – Custom form does not display the correct Requisition Status, Vendor ID, or Total Amounts after the requisition has been modified. The problem occurs when the user has either changed the vendor, changed amounts or added/modified item information.

When the process opens the Requisition Inquiry screen and the user presses the submit button, the changes will not be displayed on the View/Modify/Del – Custom form. To ensure that the changes have been made, the user must go back to either the Faculty or Employee menu. From there the user will then click on the 'View/Modify/Del Reqs - Custom' Hyperlink. This will refresh the data on the form and the user will be able to see the changes made.

Deleting a Requisition

You can delete any requisitions that has not been turned into a Purchase Order by clicking on the Employees (or Faculty) menu.

Requisitions

Requisitions for Goods and Services - Custom
View/Modify/Del Reqs - Custom
Approve a Requisition

- Click on the 'View/Modify/Del Reqs - Custom' Hyperlink

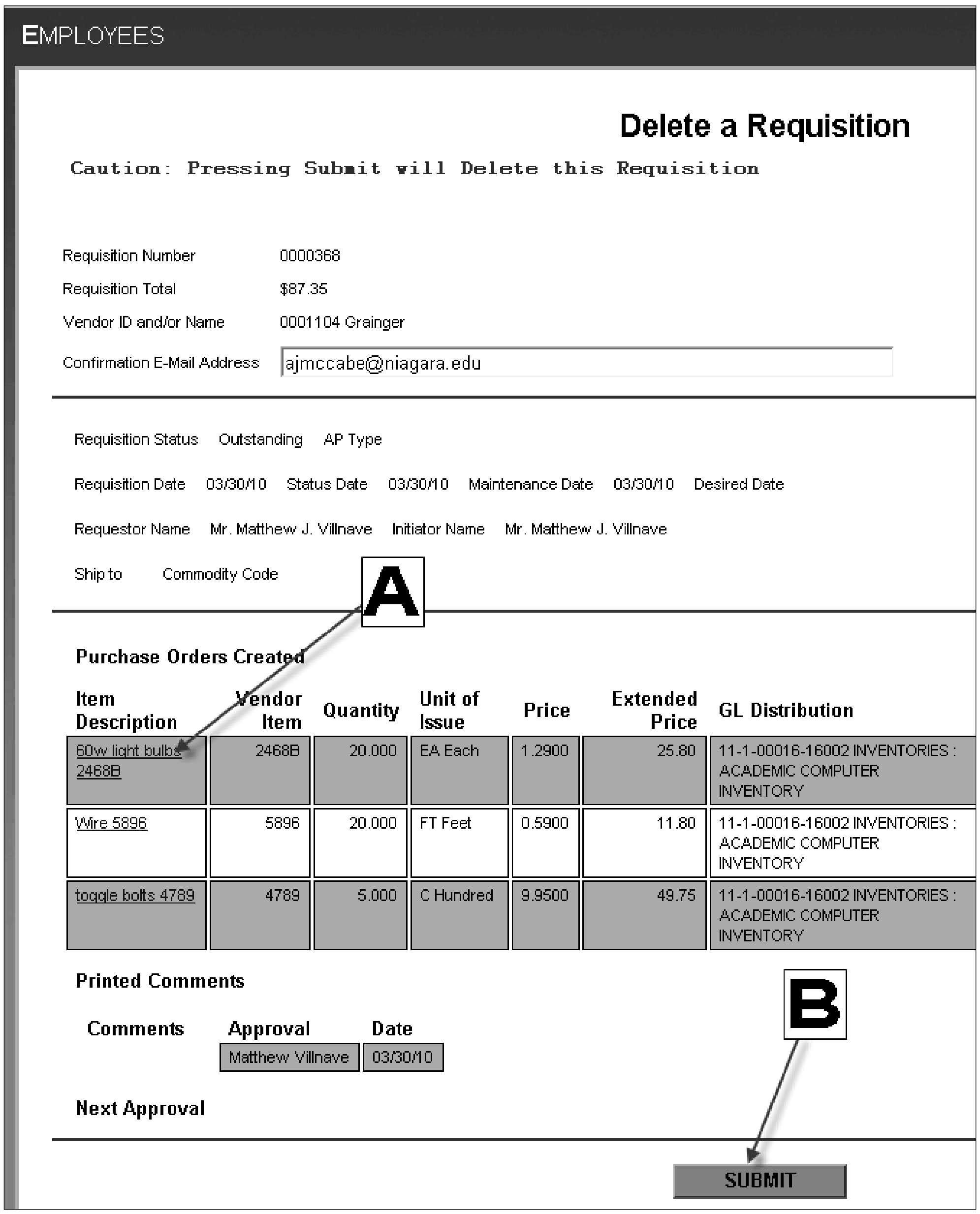
Requisition Number	Requisition Date	Status	Purchase Orders Created	Requestor Name	Initiator Name	Vendor ID	Vendor Name	Total Amount			
0000368	03/30/10	Outstanding		Mr. Matthew J. Villnave	Mr. Matthew J. Villnave	0001104	Grainger	87.35	Receive	Modify	Delete
0000367	03/27/10	Not Approved		Mr. Matthew J. Villnave	Mr. Matthew J. Villnave		testing approvals again	3.00	Receive	Modify	Delete
0000366	03/27/10	Not Approved		Mr. Matthew J. Villnave	Mr. Matthew J. Villnave		testing approvals	5.00	Receive	Modify	Delete
0000365	03/26/10	PO Created	P0028128	Mr. Matthew J. Villnave	Mr. Matthew J. Villnave		Johnny Come Lately	12.00	Receive	Modify	Delete
0000364	03/26/10	Outstanding		Mr. Matthew J. Villnave	Mr. Matthew J. Villnave		Test Vendor	2.00	Receive	Modify	Delete
0000305	02/02/10	PO Created	P0028036	Mr. Matthew J. Villnave	Mr. Matthew J. Villnave	0123679	Gov Connection Inc	1,295.00	Receive	Modify	Delete

Web Advisor will open the View/Modify/Del Requisitions form. The form will display all of the requisitions that you created. To delete a requisition, simply click the 'Delete' hyperlink next to the appropriate requisition. The process will open the Delete a Requisition form.

Deleting a Requisition (continued)

Delete the requisition by pressing the Submit Button (see **B**). Once this button has been pressed, Web Advisor will send the operator and Business Services an email notification.

To view detail information about the Item, click on the Item Description Hyperlink (see **A**)



EMPLOYEES

Delete a Requisition

Caution: Pressing Submit will Delete this Requisition

Requisition Number 0000368
Requisition Total $87.35
Vendor ID and/or Name 0001104 Grainger
Confirmation E-Mail Address ajmccabe@niagara.edu

Requisition Status Outstanding AP Type

Requisition Date 03/30/10 Status Date 03/30/10 Maintenance Date 03/30/10 Desired Date

Requestor Name Mr. Matthew J. Villnave Initiator Name Mr. Matthew J. Villnave

Ship to Commodity Code

A

Purchase Orders Created

Item Description	Vendor Item	Quantity	Unit of Issue	Price	Extended Price	GL Distribution
60w light bulbs 2468B	2468B	20.000	EA Each	1.2900	25.80	11-1-00016-16002 INVENTORIES : ACADEMIC COMPUTER INVENTORY
Wire 5896	5896	20.000	FT Feet	0.5900	11.80	11-1-00016-16002 INVENTORIES : ACADEMIC COMPUTER INVENTORY
toggle bolts 4789	4789	5.000	C Hundred	9.9500	49.75	11-1-00016-16002 INVENTORIES : ACADEMIC COMPUTER INVENTORY

Printed Comments

B

Comments	Approval	Date
	Matthew Villnave	03/30/10

Next Approval

SUBMIT

Note – you cannot delete a requisition that has been turned into a Purchase Order. If the Purchase Order needs to be voided, please contact Business Services.

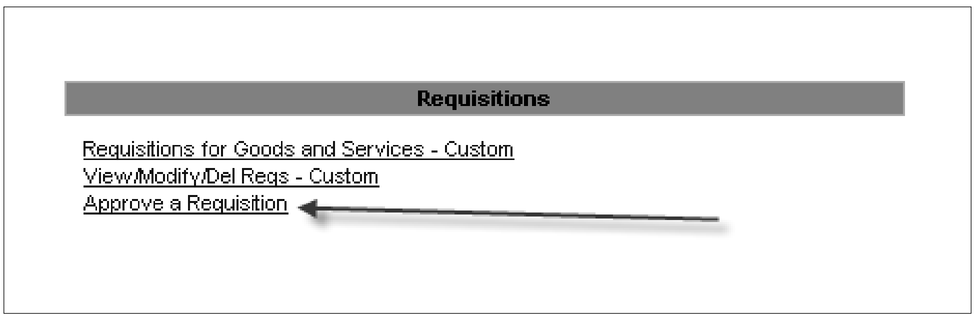
Approving Requisitions

If you are department head or manager you may have the ability to approve requisitions. Based on your approval levels you may have the responsibility of approving requisitions that have been created by others in your area. In order to approve requsitions within the Colleague you must have the following:

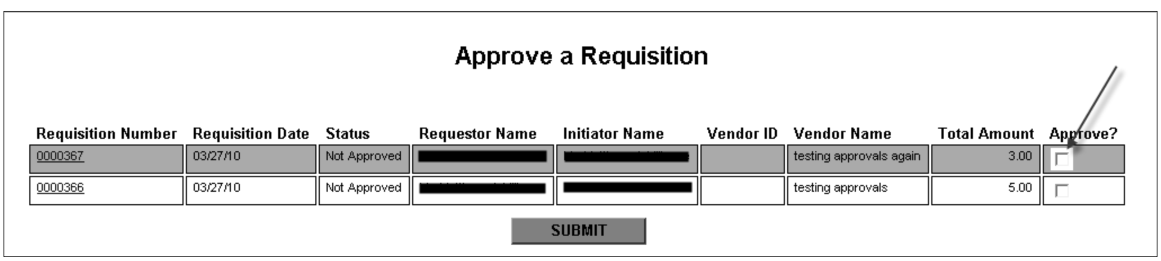
Authorization from your Department head and/or controller's office listing the GL accts and the requisition dollar amount.

Approvals can be done through both Web Advisor and Colleague UI, this documentation will focus only on approving requisitions through Web Advisor.

- Click on the 'Approve a Requisition' Hyperlink



Web Advisor will open the Approve a Requisition form. The form will display all requisitions that need to be approved. To approve a requisition, simply check the appropriate requisition and press Submit. The process will send the initiator and Business Services an email notification that the requisition has been approved.



Approve a Requisition

Requisition Number	Requisition Date	Status	Requestor Name	Initiator Name	Vendor ID	Vendor Name	Total Amount	Approve?
0000367	03/27/10	Not Approved	[redacted]	[redacted]		testing approvals again	3.00	
0000366	03/27/10	Not Approved	[redacted]	[redacted]		testing approvals	5.00	

SUBMIT

Note: You can also approve multiple requisitions on this form.