Introduction to WebReq:

Currently the Purchasing Department receives a four part paper form Purchase Requisition (PR), which is manually completed by the end user and then sent through the campus mail, faxed or brought over to the Purchasing office.

The new Web based purchase requisition application- WebReq enables end users to complete PR's online and submit them electronically to Purchasing, thereby eliminating re-keying of data in turn reducing transcription errors and improving throughput or processing time. The new Web based Purchase Requisition's are referred to as WR's in this documentation.

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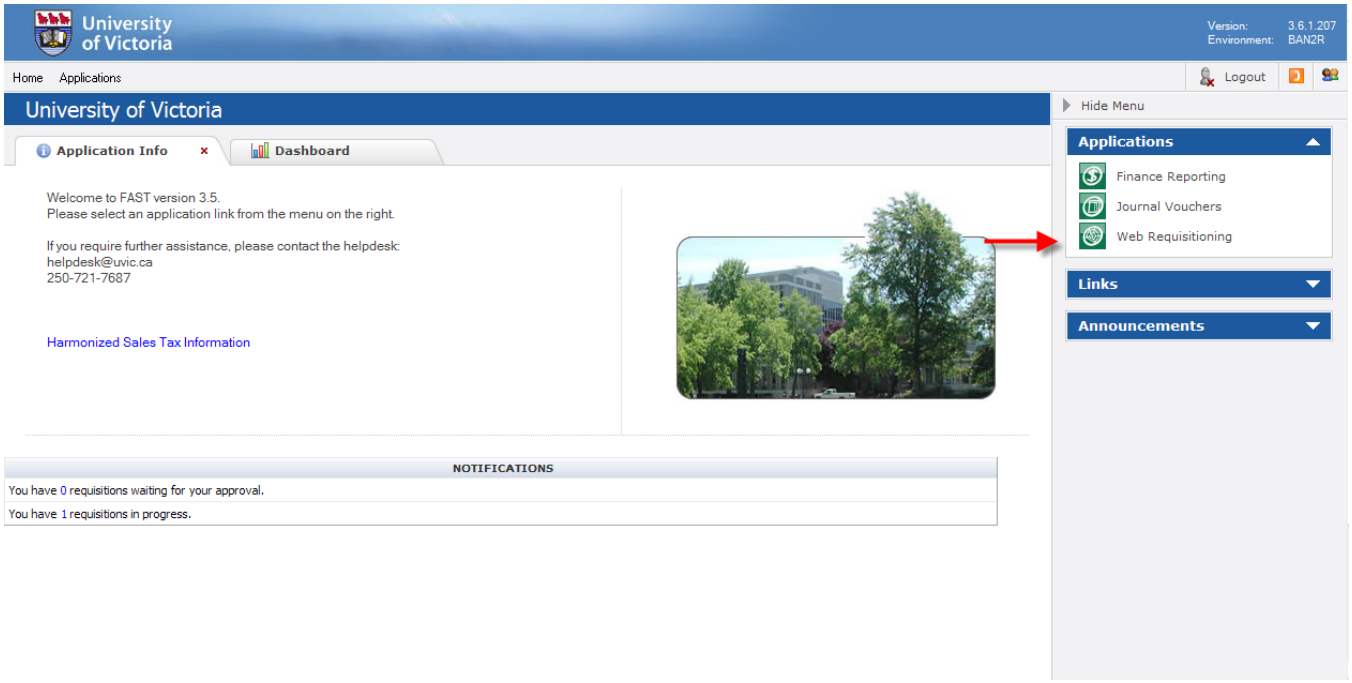
How to Enter a Requisition:

1. Once logged into Uvic you can access FAST by clicking on the down arrow beside “My online tools” in the status bar at the top of the page, and selecting FAST.

If you do not currently have access to FAST and require a FAST ID contact the General Accounting Supervisor to have one set up.

NOTE: Not all users with FAST Finance access will have access to WebReq. You must be granted access to the WebReq role sperately. This can be done through Purchasing by contacting Rosanna Perri (rperri@uvic.ca).

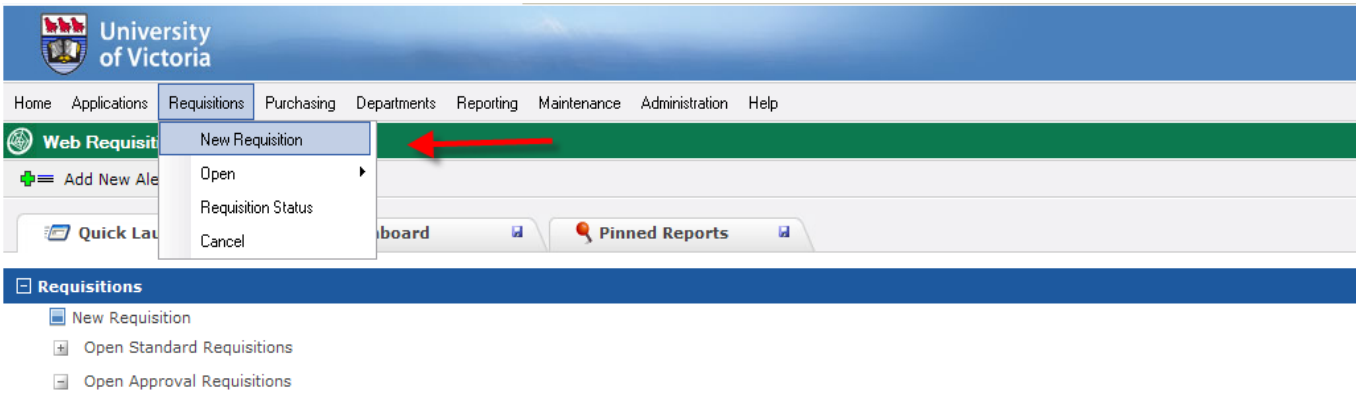
2. Choose Web Requisitioning under Applications at the Home page



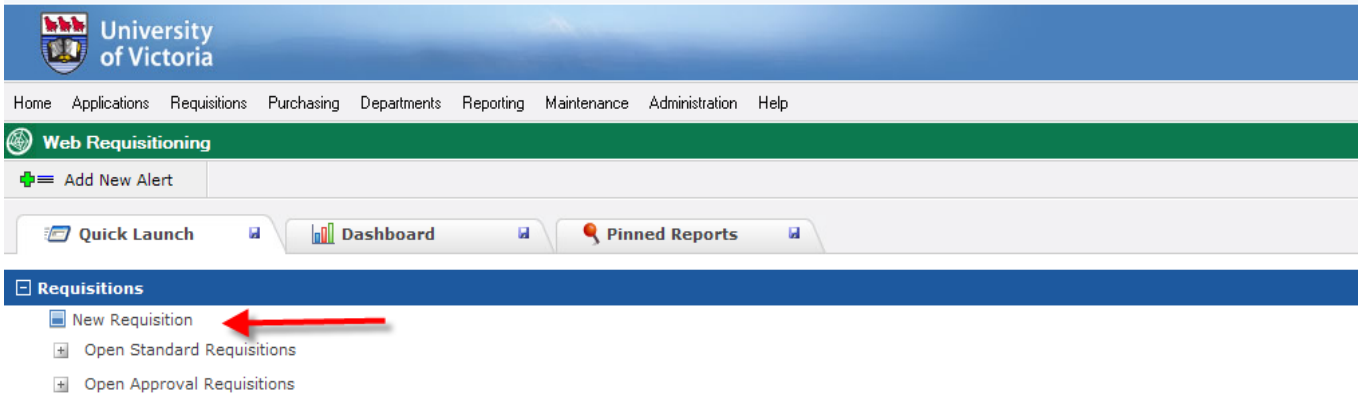
How to Enter a Requisition (Cont'd):

3. To create a new requisition there are two options:

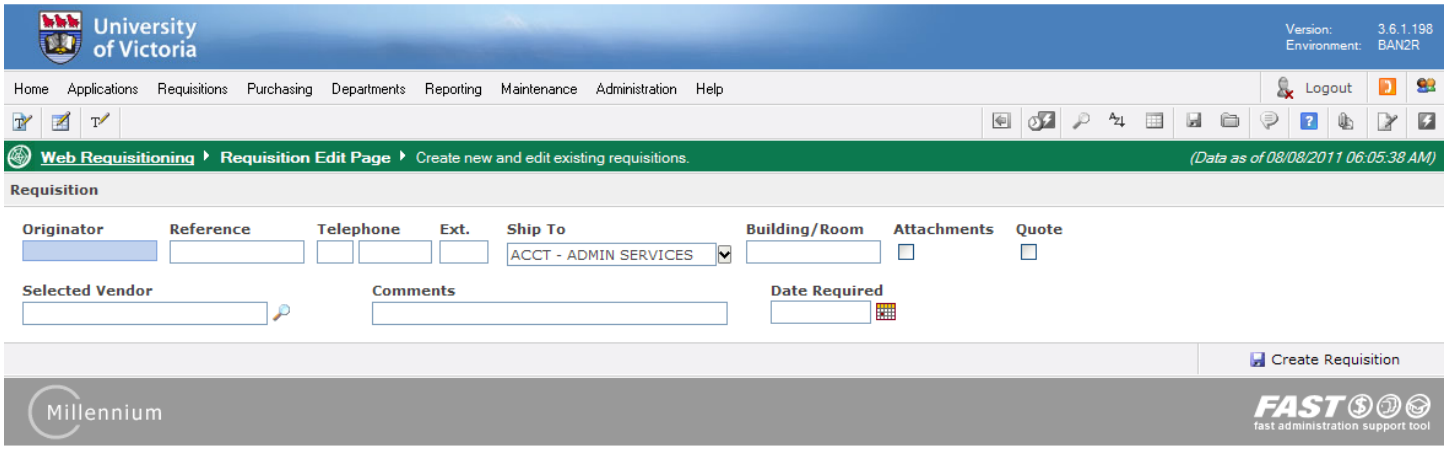
1) Under the Requisition menu, select New Requisition by double clicking once the text is highlighted



2) Click on New Requisition under Requisitions in the Quick Launch Tab.



Header Information



How to Enter a Requisition (Cont'd):

4. You are ready to generate a new requisition. The first field is the **Originator**, this field will automatically populate with your FAST logon ID once you have saved the requisition. You cannot type in this field.

5. In the **Reference** field type the reference number, or something that is meaningful to you (up to 8 characters).

6. Enter your full telephone number (including prefix) in the **Telephone** field so that Purchasing can contact you if they require additional information.

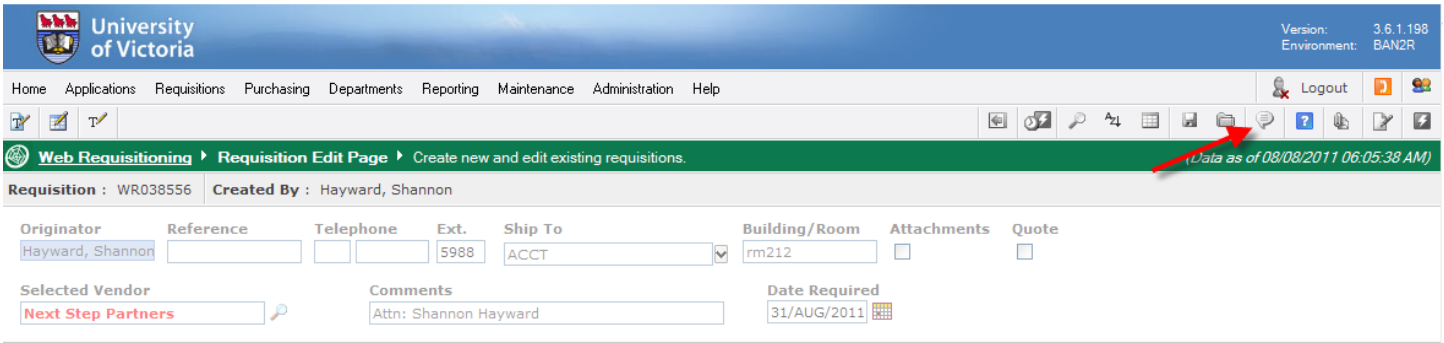
7. Select the **Ship to Code** from the drop down arrow or type in your 4 digit department code, the drop down box will show the building that you are in. If you cannot find the appropriate ship to code and matching building, please contact Purchasing.

8. In the **Building/Room** field you may add additional info such as a room number. This field is optional, however if the shipment is arriving via courier completing this field is highly recommended and will expedite delivery.

9. For the **Selected Vendor** field

a. First search and select for vendor by using the magnifying glass for the Vendor ID. The Vendor ID code is from the Banner Purchasing database. To search for a vendor type the first name only. A (%) wildcard can be used with a portion of the vendor's name.
Example: - Dell% will bring up all vendor names starting with Dell. %Computers will bring up all vendors with Computers as the last word in their name.

b. If you do not find the vendor from your search or this is a new vendor, type the vendor name in the selected vendor box. The vendor will appear in red after the requisition is saved. If you think this is a new vendor, please ensure that you provide details for this vendor, such as an address, telephone /fax number for Purchasing in the note for this requisition see print screen below. Purchasing will need the information in order to update and validate their database.



How to Enter a Requisition (Cont'd):

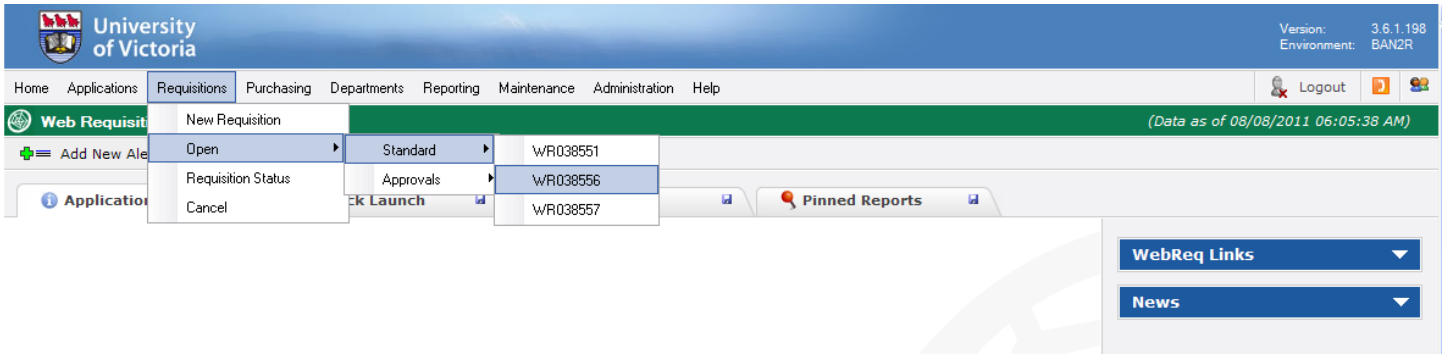
10. You may enter any vendor related comments in the **Comment** box that are related to the order and that you want appearing on the Purchase order for the vendor to see. Ex. - Please call Rosanna @ 721-8326 before you deliver goods.

11. **Date Req'd** field, if left blank with automatically default to 10 days in the future. The minimum is 3 days in the future to allow purchasing time to process the PR. This field is a courtesy field; future dating a WR does not mean that purchasing won't process it before that time. Additionally, if the order is a rush order, future date the field to the minimum and make notes in the comments field that it is an urgent order and delivery is required by a specified date.

12. Press Create Requisition to save the header information. You will notice that a requisition number has been generated beginning with WR. Please press the save button once and wait until the process time bar at bottom is done. **Very important:** Do not press "Create Requisition" multiple times as the application is processing otherwise multiple WR#'s will be generated that will appear in your standard menu until cancelled or reused.

13. Once saved, you may come back to the WR later and retrieve it.
Please note if you return to the WR and change only the header info, you will have to add commodity info in order to resave the change.

To return to complete your WR, you will be able to retrieve it from the Requisition menu. Hold your cursor over Open menu and then over the Standard queue, the WR number will come up.



14. The next section of the form is commodity items. Enter a detailed description of the item you are ordering in the text box available. The text will wrap on its own or press enter if you want to start a new line. You may add as much information as you wish; there is no limit to the amount of characters. This will help Purchasing identify the commodity code.

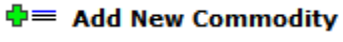
How to Enter a Requisition (Cont'd):

15. Enter a **quantity**, **unit of measure** and an accurate estimated **price** for each item. For $0 value item enter $.0001 in the unit price, the amount is $0.00. If you do not have a price estimate enter $1.00.

16. To add subsequent commodity items to the same default account (Fund-Orgn-Acct) apply the green check mark on the first item of your order ☑. Any additional commodities you add will default to the same account or same account split entered for your commodity checked. The green check mark is needed once, not for each item. Save the info by hitting the save icon .

17. Enter the Accounting information.

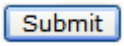
- FUND, enter your fund number, a drop down box will display the fund number and name.
- ORGN, enter the organization code, again you may type in your org number or select from the drop down box.
- ACCT, enter the sub code for the appropriate commodity. All three are required fields.
- PROG code will default automatically.
- If your department uses location and activity codes you may enter them. These fields are optional and can be left blank.
- Save with the or if you want to split the price between multiple accounts save with to add another account line.

18. If you have another item to add to this order, click on 

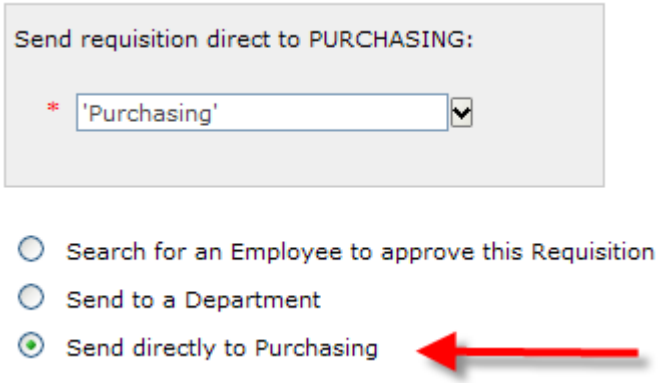
icon and repeat steps 15-17.

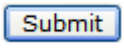
19. When all fields are complete, you may print or send the WR for approval to the appropriate signing authority.

- To view a print preview of the WR use the Print Requisition icon.
- To submit the WR to purchasing or to send the WR for approval, use the Submit for Approval icon.

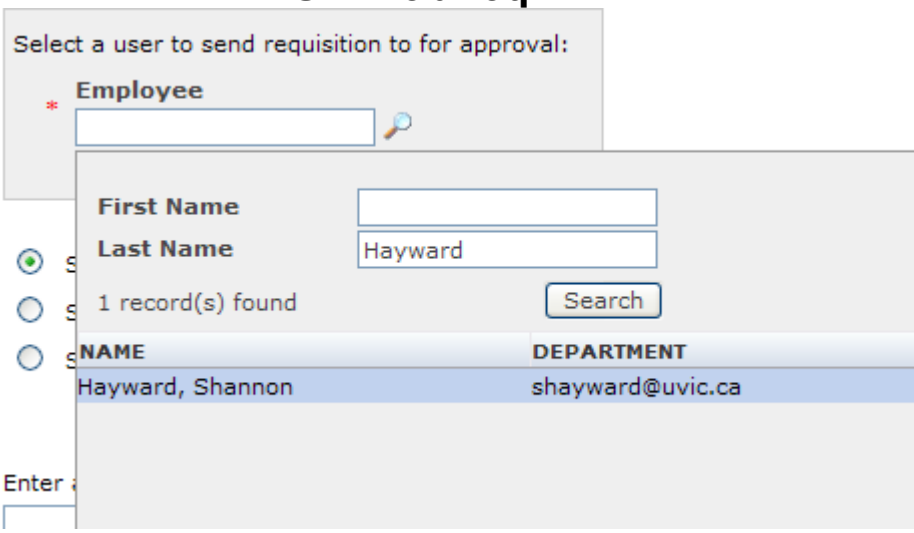
20. On the Requisition Approval page if no approvals are required send the WR directly to Purchasing by checking the '**Send directly to Purchasing'** box. Ensure 'Purchasing' is displayed in the drop down box that appears (see below). Press  at the bottom.

How to Enter a Requisition (Cont'd):



21. If the Requisition requires an approval choose "Search for an Employee to approve this Requistion", click on next to the **Employee** box. Type the First name and/or Last name of user and press search; partial names or the %wildcard can be used. The desired employee name and email address will appear; double click the name; it will populate in the employee box. Press  at the bottom.

FAST WebReq

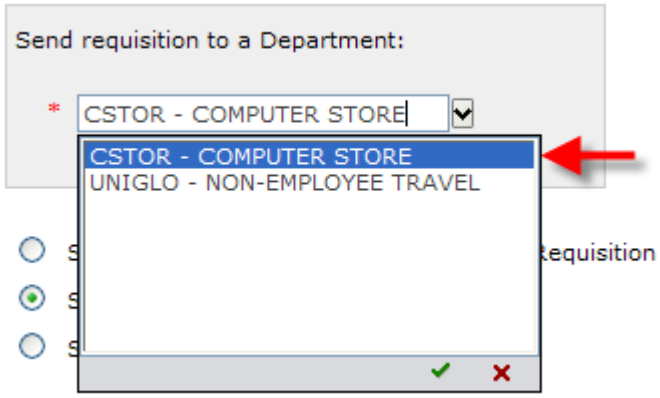


Note: If the approver you are looking for is not appearing in the list, try using just a portion of the name. As some employees have a 1st initial or hyphens, etc. If the persons name still does not appear call Rosanna Perri to see if that person has been granted access to the WebReq role.

How to Enter a Requisition (Cont'd):

The Return to Requisition link can be used at any point prior to submitting the WR to Purchasing.

22. If the Requisition is for a purchase from the Computer Store,Technology Solution Centre or the Bookstore, send the WR directly to the department by checking the **' Send to a Department'** box. Choose the department form the drop down box. Press Submit at the bottom.



Icon Legend for WebReq Creation

	Saves the current commodity or accounting line
	Saves the current line & adds another line
	Opens the line for editing
	Cancels the line you are editing
	Deletes the line
	Search from a list
	Click here to add an attachment to the Requisition
	Click here to add notes to the Requisition
	Displays the Approval History of the Requisition
	Displays a Print Preview of the Requisition
	Forwards User to Requisition Approval and Submission Page

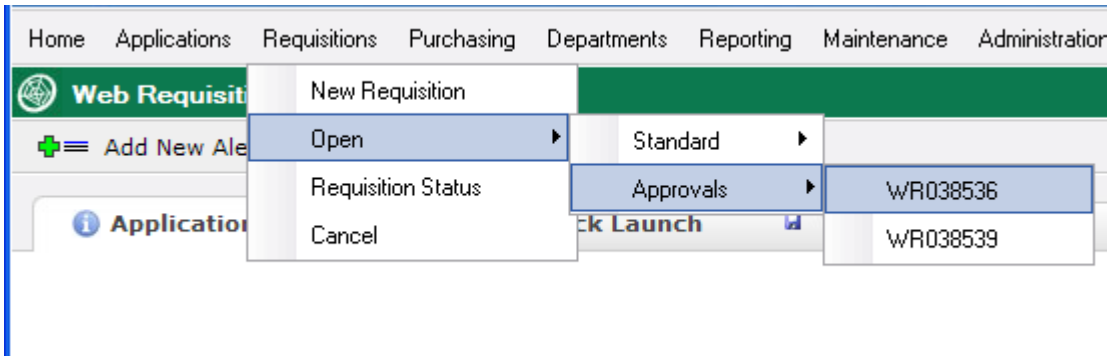
How to Return to a Requisition:

You may save a partially completed WR and return to it later if you have not sent it on for approval or to Purchasing.

Once saved, you can close the window browser or go to another tab within FAST.
i.e. Finance or Home.

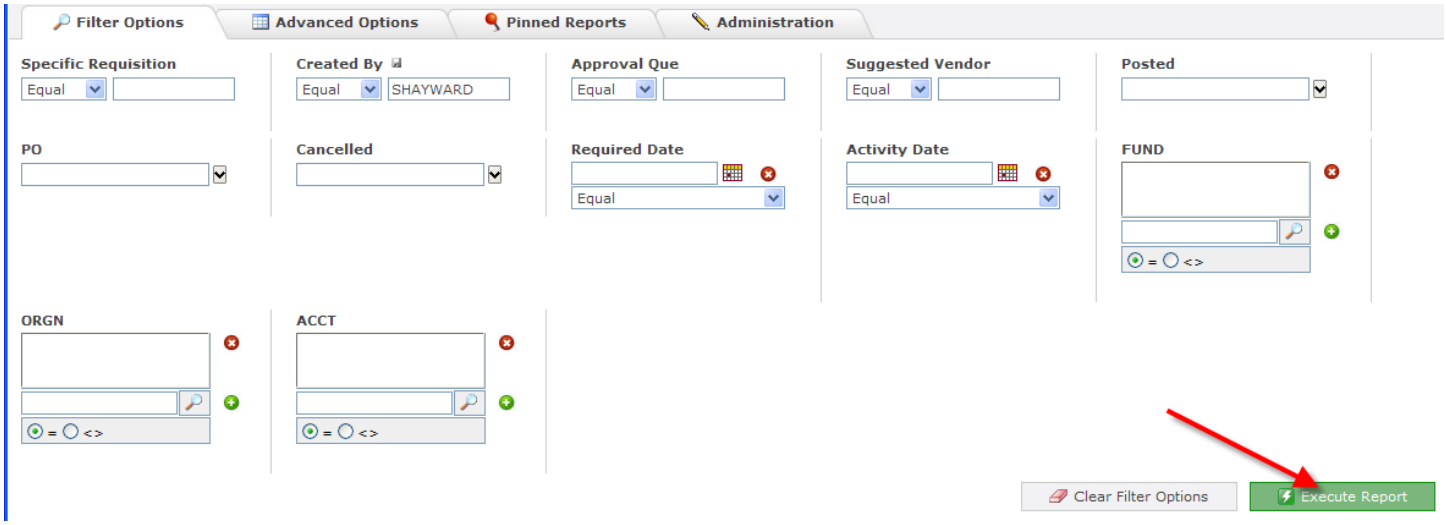
When you wish to return to the WR log back on to FAST and chose the WebReq tab: Go to the Requisition menu and hold your cursor over the **Open** menu, scroll over the **Standard** menu and then to the appropriate **WR#** as shown below.

Note: The Open-Approvals menu will show Requisitions that have been sent to you and are awaiting your approval.


Home
Applications
Requisitions
Purchasing
Departments
Reporting
Maintenance
Administration
Web Requisit
Add New Ale
Applicatio
New Requisition
Open
Requisition Status
Cancel
Standard
Approvals
ck Launch
WR038536
WR038539

How to View the Status of a Requisition:

1. On the WebReq tab go to the Requisition menu; select Requisition Status. A number of search filters appear as shown below. (the 'Created By' field populates with your user ID) and then click on Execute Report.



2. You may select a value for a number of filters, but you must at least fill out one filter.

Filter Options	Accepted Value for the Field
Specific Requisition	Type the requisition number The wildcard can be used. Ex. %794 will bring up WR000794
Created By	Type the User ID (or part of it) of the person who created the requisition (also known as the Originator).
Approval Queue	Type the name of the person you sent the requisition to for approval. If you want to see what has already been submitted.
Suggested Vendor	Type the name of a vendor (or part of it) you have suggested.
Posted	Select **Yes** if you only want to see Requisitions posted by Purchasing to Banner. Select **No** for Req's not yet posted to Banner
PO	Select **Yes** to view Req's that has a PO # assigned. You will be able to view the PO # assigned.

	Select **No** to view Req's that so not have a purchase order number.
Cancelled	Select **Yes** to view a WRthat has been cancelled. Select **No** to only view Req's that have not been cancelled.
Required Date	Click the calendar, select the date, and then select one of the options in the drop-down list.
Activity Date	Click the calendar, select the date, and then select one of the options in the drop-down list.
Fund	Enter the Fund and then click on . To remove a Fund that you have chosen, highlight the Fund and then click on . To do a search Click on .
ORGN	Enter the ORGN and then click on . To remove a ORGN that you have chosen, highlight the ORGN and then click on . To do a search Click on .
ACCT	Enter the ORGN and then click on . To remove a ORGN that you have chosen, highlight the ORGN and then click on . To do a search Click on .

How to Cancel a Requisition:

Cancelling a WR can be used on a WR that was created in error or for WR's that are to be made on a Standing Order Agreement, an AGR, or for an Internal Computer or Bookstore purchases. You should create the Requisition in WebReq and then fax, phone, or walk-in in the order to the appropriate vendor. You must then cancel the WR citing the appropriate rationale (see steps below).

1. On the WebReq tab go to the Requisition menu; select Cancel.

2. Enter the WR###### (all 8 characters must be entered)
   If you do not know the WR # first go to Requisition Status and search for the Req.
   The WR# will appear in the left column.

3. From the drop down box select an appropriate cancellation reason and double click on it.
   If one does not exist phone Purchasing Services to add the required reason to the list.

4. Hit Submit

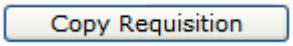
5. Click OK when prompted with the Are you sure you want to cancel this requisition?
   You will get the following message: Requisition ######## has been successfully cancelled.

Note: You cannot cancel a Requisition once it has been passed onto Purchasing.

How to Copy a Requisition:

1. First search for the Requisition using the Requisition Status menu.

2. On the desired Requisition click the copy icon in the far right hand column.

3. The Requisition details open; click the 

button.

4. A new Requisition number is generated. You may keep the WR details the same and resubmit an identical Requisition or edit the WR by adding, deleting or changing any of the header, commodity or accounting information prior to resubmitting it.

How to Change the Approver for a Submitted Requisition:

If you have submitted a Requisition to an approver and the approver is not able to review the WR (i.e. he or she is on vacation or leave), you can send the WR to another approver for approval instead.

Once you send it to a different approver the first approver will no longer be able to access the WR. It may sit in only one approval queue at a time.

You can only exercise this feature if the WR has not been sent to purchasing or cancelled.

1. On the **Requisitions** menu, go to **Requisition Status.**

2. Search for the Requisition using the filter options.

3. Click Search.

4. The list of Requisitions opens. **You can only change the approver for requisitions that have a blue hyperlink in the approval queue column.**

5. On the desired Requisition, click the blue hyperlink with the Approver's ID in the Approval Queue column.

6. The Requisition Approval page opens.

7. To send it to another employee click to search for an employee to approve it.

8. Enter Additional Comments if desired.

9. Click Submit.

PLEASE NOTE:

For security purposes, make sure you exit from FAST or lock your workstation, if you leave an unfinished requisition for a period of time.

Everyone that wishes to log onto the Fast portal will need an Oracle ID/FAST logon. To obtain and Oracle ID/FAST logon contact General Accounting.

If the requisition is not approved, or at the end of the cycle the requisition will be sent back to end user for cancellation and it will remain as a cancelled WR in their queue.

Users can look up the status or if there is a PO # assigned to their requisition. You will be able to view/check any history to all requisitions that you have generated.

The originator is required to save or print a copy of their original Req's so that if Purchasing makes any changes to it the originator will have a record of it.
A PDF file can be saved from the Millennium WebReq.

A requisition may be sent to another approver even if it is not in balance.
Ex. The commodity total does not equal the accounting total; however, it must be balanced (Requisition Balance = $0), before it can be sent to Purchasing.

The help menu within WebReq can be accessed at any time and point for generic application based documentation.

Specific UVIC customized documentation can be found online on the Purchasing Website.