How to Submit a Web Requisition (WebReq) in FAST

Table of Contents

Initiate the WebReq in FAST 1
Enter Shipment and Vendor Information 2
Add Commodity and Account Details 3
Obtain Requisition Approval 5
How to Return to a WebReq 6

Initiate the WebReq in FAST

	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

Figure 1: Icon Legend for WebReq Creation

1. In order to gain access to FAST WebReq, submit a "Financial Systems Access Form".
2. Sign in to UVic and click on the Online tools button in the upper right-hand corner to access FAST.

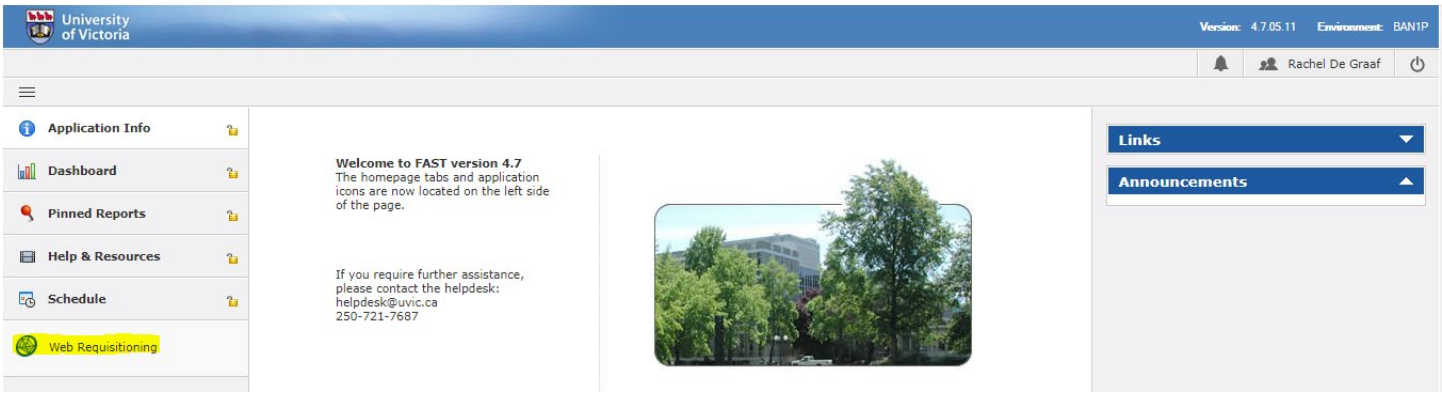


Figure 2: FAST Landing Page

3. Under the Application Info tab on the Home Page, select Web Requisitioning (see Figure 2, above).

4. To initiate a new WebReq, you may take one of two actions:

   a. Under the Requisitions menu, double click New Requisition; or

   b. In the Quick Launch tab, click New Requisition under Requisitions (see Figure 3).

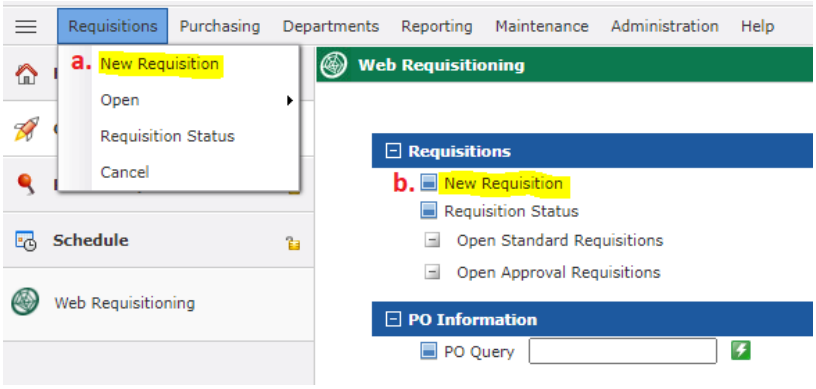


Figure 3: WebReq Initiation

Enter Shipment and Vendor Information

5. Enter the Header Information (Figure 4) according to the following guidelines.

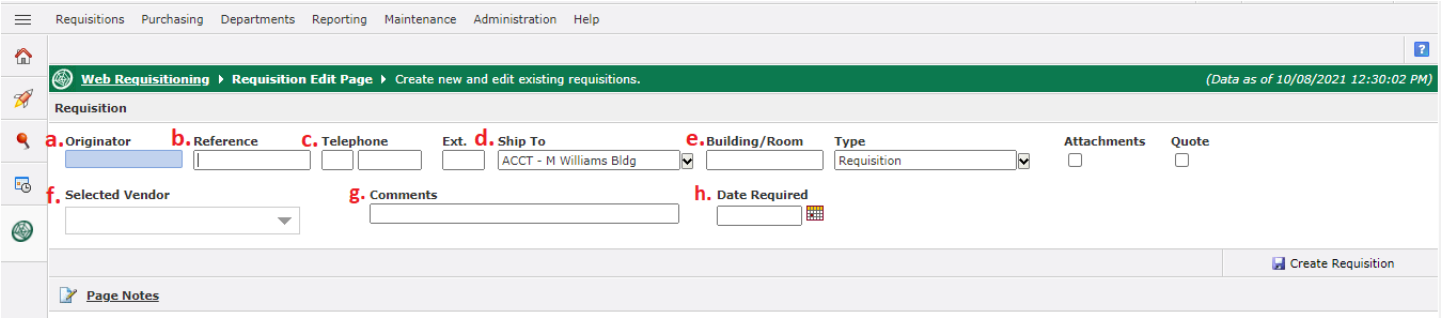


Figure 4: Annotated Header Information

   a. **Originator** – Your FAST login ID will automatically populate this field.

   b. **Reference** – Leave this field empty. The WebReq number will automatically populate this box when you create the WebReq.

   c. **Telephone** – Enter your telephone number (including prefix) so Purchasing can contact you for additional information.

   d. **Ship To** – Type in your department code or use the drop-down arrow to select the building you are in. Double click on your building. If you cannot find the appropriate Ship To code and matching building, please contact purchase@uvic.ca.

   e. **Building/Room** – You may add additional information such as a room number. This field is optional, but if the shipment is arriving via courier, completing this field is highly recommended to expedite delivery.

   f. **Selected Vendor** –

      - First, use the drop-down arrow to search for and select a 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 also be used with a portion of the vendor's name. For example, Dell% will bring up all vendor names containing Dell.

- If you do not find the vendor from your search, type the vendor name in the Selected Vendor field (it will appear in red after you save the requisition).
    - ❖ Note: If you think this is a new vendor, provide vendor details, such as an address and telephone/fax number, in the Page Notes.

g. **Comments** – Enter any order related comments that you want to appear on the Purchase Order for the vendor to see. For example: Please call Rosanna @ 205-555-3462 before you deliver goods.

h. **Date Required** – The default is 10 days in the future. The minimum is 3 days in the future. If the order is a rush order, make a note in the comments field that it is an urgent order.

6. Click Create Requisition to save the header information, and wait until the process time bar at the bottom is done. This will generate a requisition number beginning with WR. DO NOT click Create Requisition multiple times while the application is processing. If you do, you will generate multiple WebReqs.

Add Commodity and Accounts Details

7. Enter the commodity information by clicking Add Commodity Item (See Figure 5).

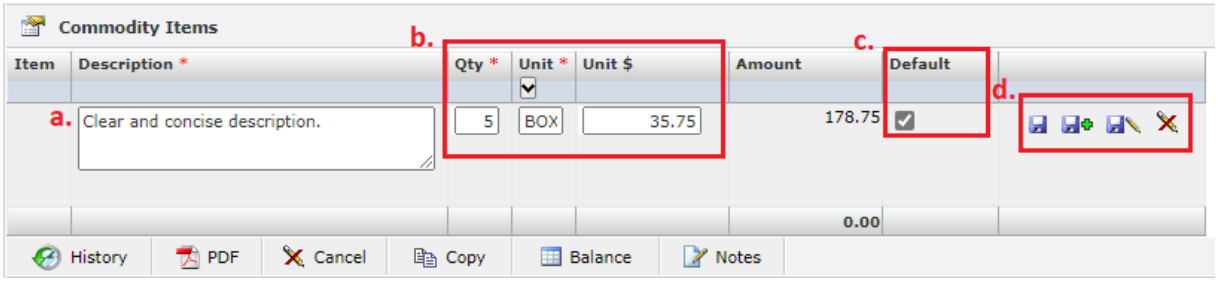


Figure 5: Commodity Items

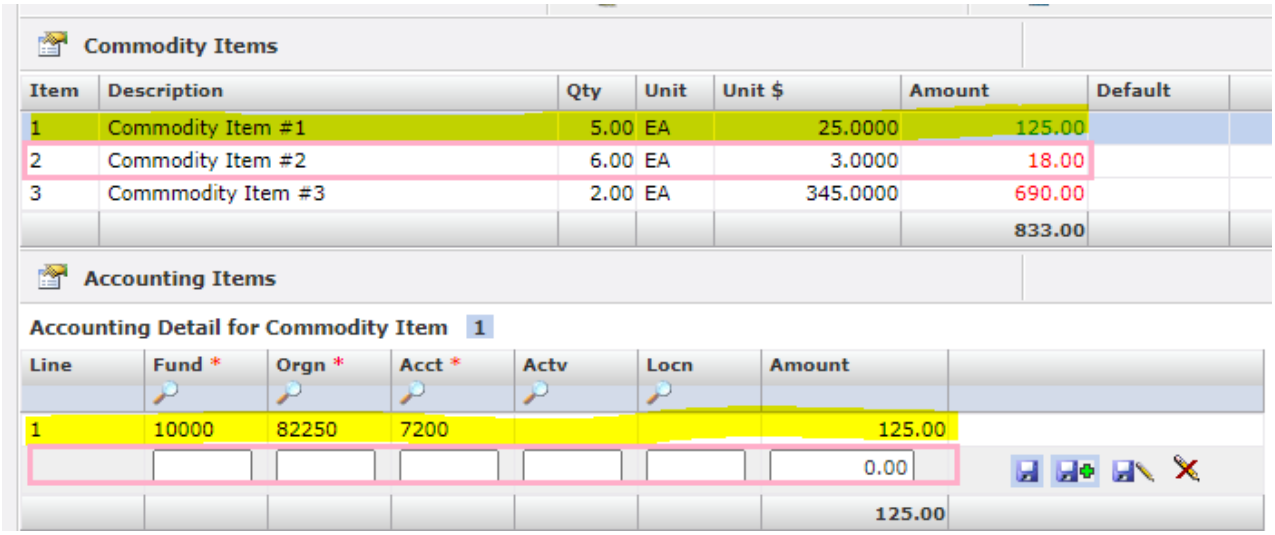
a. Enter a concise but clear description of the good or service that you are purchasing.

b. Enter a **quantity**, **unit of measure** (by double clicking), and an estimated price (**Unit $**) for each item. The amount must be before taxes and must remain in the quoted currency. Do not convert to Canadian dollars as this will be done at the time of payment. Do not add any free items to the commodity lines. (Each item in the commodity lines should have a value greater than $0.) For an item with a value of $0, make a note of the item in the comments section and do not add it to the commodities.

c. Only apply the default check mark if all commodity items of this order will be charged to the same FAST account. Save by hitting the save icon.

- Note: If you have a Quote with many lines (all of which will be charged to the same account), you may use one commodity line. However, you must detail what the order is and reference the Quote number.

If you input several commodity lines that must correspond to different FAST accounts, ensure that the default checkbox is not checked, and then manually enter the FAST account information for each commodity item into the Accounting Items section below. Enter the accounts in the same order you have entered their corresponding commodity items. See Figure 6, where the yellow highlighted Commodity Item #1 corresponds to the first accounting line, and the pink Commodity Item #2 will correspond to the second accounting line.



Commodity Items

Item	Description	Qty	Unit	Unit $	Amount	Default
1	Commodity Item #1	5.00	EA	25.0000	125.00	
2	Commodity Item #2	6.00	EA	3.0000	18.00	
3	Commmodity Item #3	2.00	EA	345.0000	690.00	
					833.00	

Accounting Items

Accounting Detail for Commodity Item 1

Line	Fund *	Orgn *	Acct *	Actv	Locn	Amount
1	10000	82250	7200			125.00
						0.00
						125.00

Figure 6: Commodity Item Lines Correspond to the Accounting Lines Below

d. Save the commodity items and add additional items if required.

- Note: If you are creating a WebReq for an international supplier that has shipping charges, you must create two commodity lines on the WebReq: one for the good itself and another for the shipping charges. Make sure the checkmark is applied to the first commodity item of your order if you wish the item cost and shipping cost to be charged to the same account.

- = Save item
- = Save and add new item
- = Save and edit next item
- = Cancel (remove commodity item)

8. Enter the Accounting information by clicking Add Accounting Item (see Figure 7, below). Red asterisks indicate required information.

a. **Fund** – Enter your fund number. Search your fund number by using the magnifying glass. A drop-down box will display the fund number and name.

b. **Orgn** – Enter the organization code. You may type it in or use the magnifying glass to search for it.

c. **Acct** – Enter the sub-code for the appropriate commodity. You may use the magnifying glass to search for it.

d. If your department uses activity (**Actv**) and location (**Locn**) codes, you may enter them. These fields are optional.

e. You can save or split the price between multiple accounts by saving to add another account line.

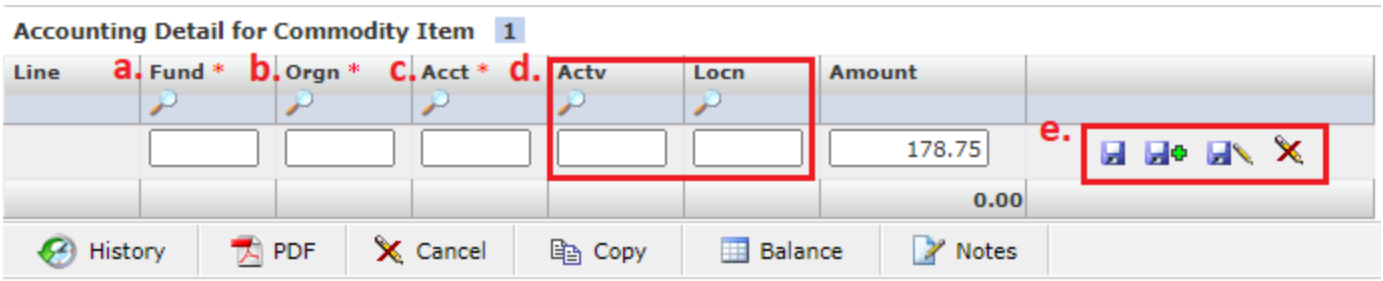


Figure 7: Accounting Details

9. If you have another item to add to the order, click on the **Add New Commodity** icon and repeat steps 8-9 above.

10. Attach additional information such as Quotes, Invoices, Direct Award form, draft Services Agreement, Proposals, or any other information that is relevant to the request. Click Attach Additional Information (see Figure 8).

    Enter a concise description of the file in the Document Comments box and choose the relevant file from your computer (see Figure 9).

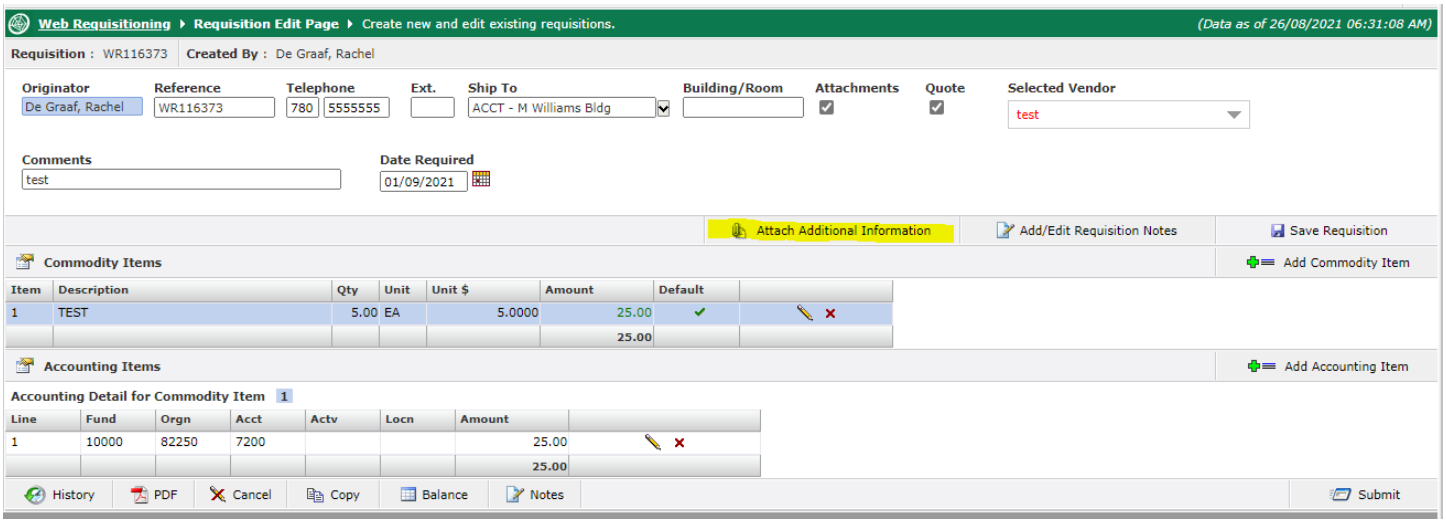


Figure 8: Attach Additional Information

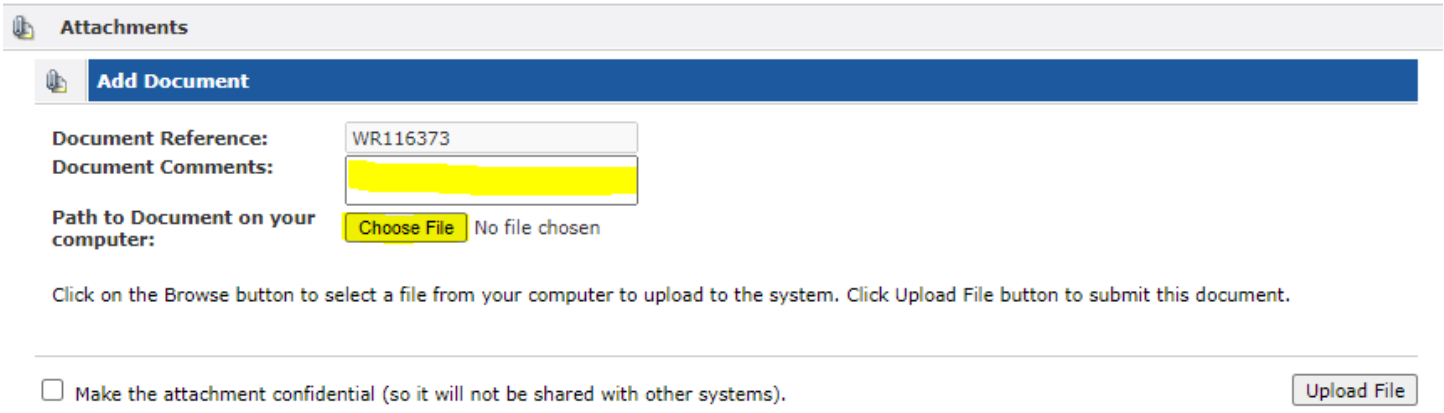


Figure 9: Choose a File to Attach

Obtain Requisition Approval

11. When all fields are complete, you must send the WebReq to the appropriate financial signing authority for approval by clicking Submit .

    a. If the WebReq requires an approval, choose "Search for an Employee to approve this Requisition", click on the magnifying glass next to the **Employee** circle (see Figure 10). Type the first name and/or last name of the user and press search. Partial names or the wildcard (%) can be used. The employee name and email address will appear. Double click the name, and it will populate in the employee box. Enter any additional comments and press submit at the bottom. Additionally, ensure that you have asked your approver to use this

comment box when the WebReq comes to them to indicate that they have actually reviewed and approved the WebReq. They may simply write "approved".

Note: If the name you are looking for is not appearing on the list, try using just a portion of the name, as some employees have a 1st initial or hyphen. If the person's name still does not appear, that person may not be set up with access to the WebReq role. You can request access via the Accounting website's "Financial Systems Access Form".

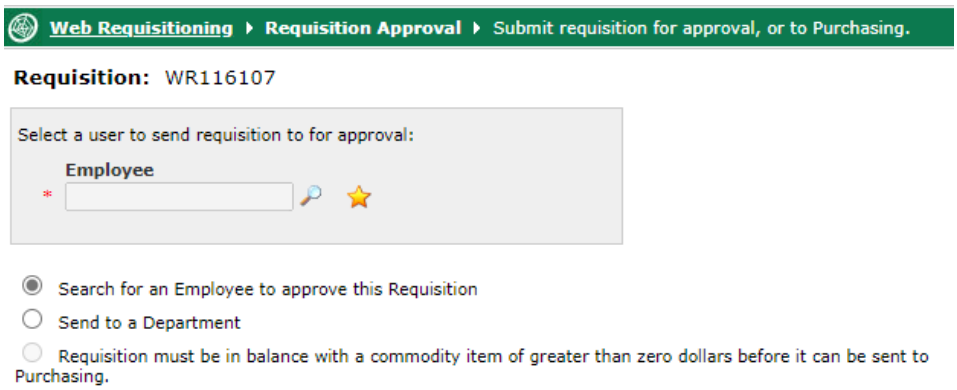


Figure 10: Employee Approval

b. If the requisition is for a purchase from the Computer Store, Technology Solution Centre, or the Bookstore, send the WebReq directly to the department by checking the **Send to a Department** circle (see Figure 11). Choose the department from the drop-down box. Press Submit at the bottom.

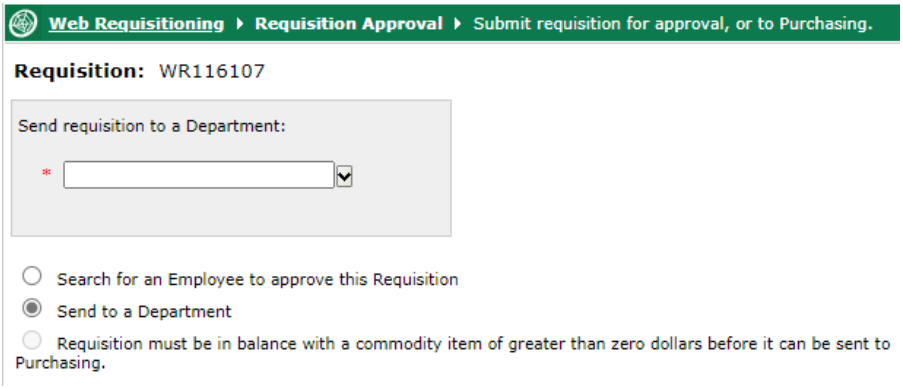


Figure 11: Departmental Approval

c. If no approvals are required, send the WebReq directly to Purchasing by checking the **Send directly to Purchasing** circle. If your FAST account does not have sufficient funds, you will see the message displayed in Figure 11 ("Requisition must be in balance with a commodity item of greater than zero dollars before it can be sent to Purchasing"). If you have sufficient funds, ensure 'Purchasing' is displayed in the drop-down box that appears. Press Submit at the bottom.

How to Return to a WebReq

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

To return to the WebReq, log in to FAST and choose the WebReq tab. Go to the Requisition menu and hover your cursor over the **Open** menu, scroll over the **Standard** menu, and then navigate to the appropriate **WR#** (see Figure 12).

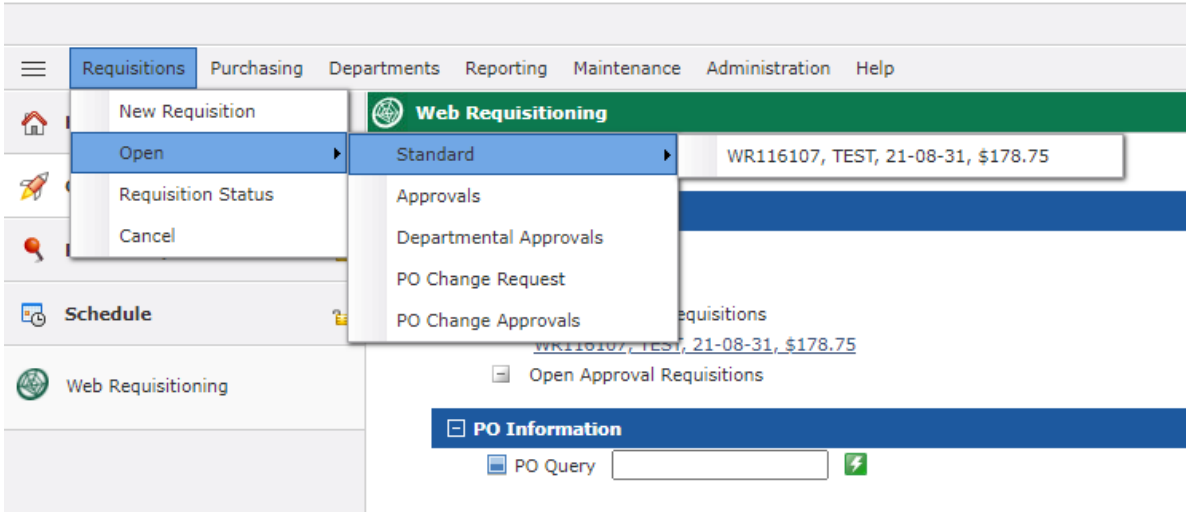


Figure 12: Returning to a WebReq