FAST WebReq System

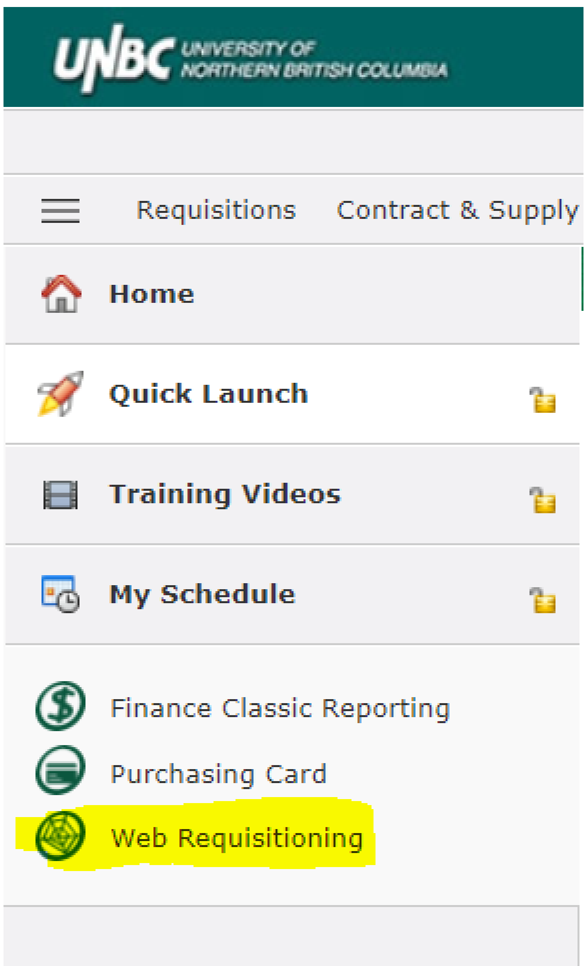
A WebReq is submitted to Contracts & Supply Chain Management for purchase and contract requests. A WebReq can be monitored for status updates, whose approval queue is the WebReq currently sitting with for approval and/or further instructions.

A WebReq is only visible to the creators and approvers that the WebReq has been submitted to, with the exception of the Contracts & Supply Chain Management department.

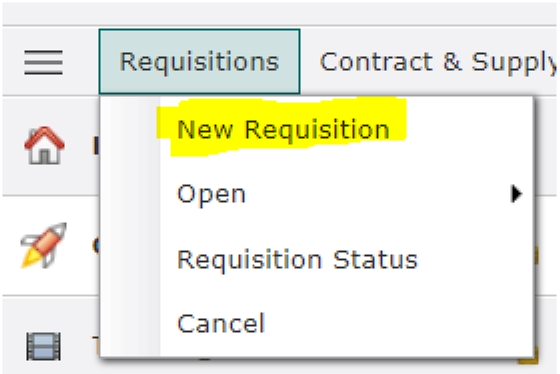
This document will assist with the creation and monitoring of WebReqs.

HOW TO CREATE A WEBREQ:

1. Click “Web Requisitioning” on the home page to be directed to Web Requisitioning

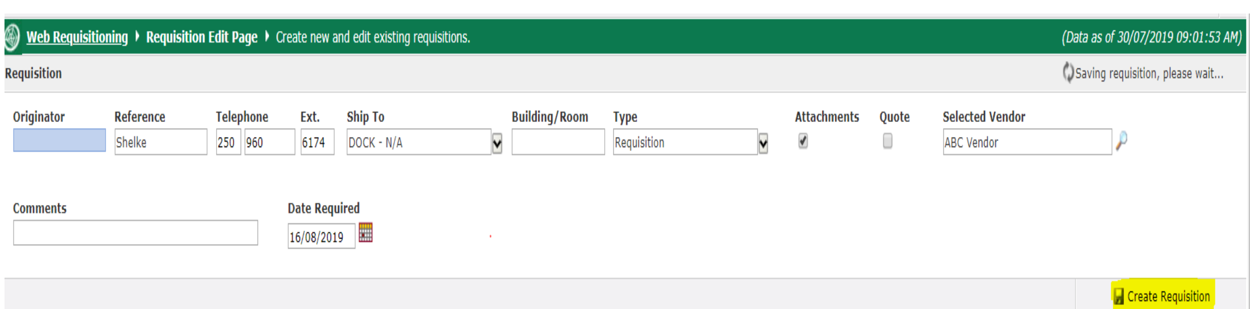


2. To create a new WebReq, click Requisitions > New Requisition



3. Enter the information as requested:
    a. Originator will auto fill with the creator's name
    b. Reference will auto fill with the last person to submit the WebReq to another approver
    c. Telephone number, please include, at least, your local
    d. Ship To and Building/Room are not required to be completed
    e. Indicate if there are attachments or quote, this is not imperative as the attachments will be available on the WebReq in the Attachments section (explained in further detail below)
    f. Provide the name of the vendor. Do not use the search to find a vendor as there are different address types for various vendors, the Purchasing Agent processing the WebReq will determine the correct vendor and address are chosen for the purchase/contract.
    g. Enter any pertinent comments. Please do not copy and paste an email message into this box. If an email is required as support for processing, please PDF the email and attach to the WebReq (explained in further detail below)
    h. Enter the date required. Please ensure this date is accurate as the Purchasing Agent will use this date to prioritize WebReqs.

Click "Create Requisition"



4. You will now have the opportunity to provide the goods/service details. Click "Add Commodity" and enter the details of your order:
    a. Description, please include the catalogue number;

b. Quantity;
c. Unit of Measure (EA, CS etc)
d. Unit Price

Each item should be entered onto its own line.

When entering the commodities, if all the items are to be purchased using the same account information (FOAPAL: Fund, Org, Account, Program, Activity and Location), ensure default for Item is checked and the system will pull the account information through for all items on the WebReq

Click either to save or to save and add another item.

5. When entering the accounting items, ensure the correct item number is reflected.

Accounting Items

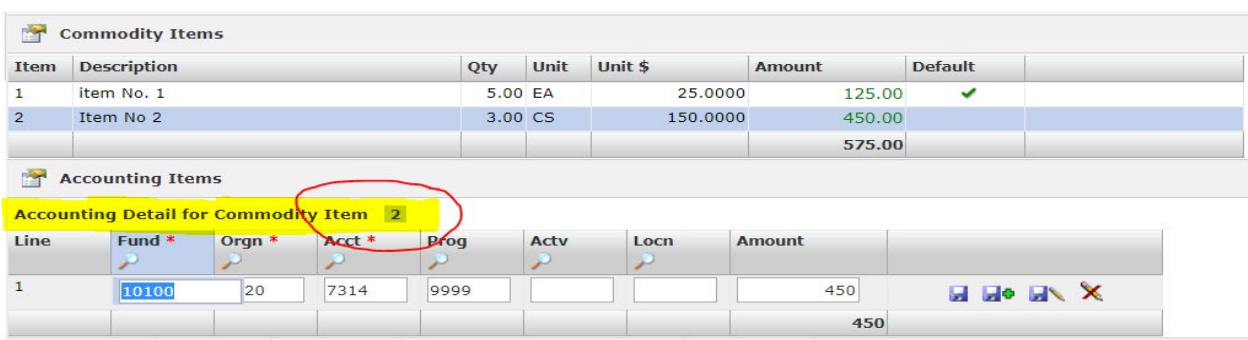
Accounting Detail for Commodity Item 1

Line	Fund	Orgn	Acct	Prog	Actv	Locn	Amount
1	10100	5220	7314	9999			125
							125

If you require an item to be split between two (2) or more accounts, once you have entered the first account information and the amount associated to that account, click and add the additional account information.

If you have checked “Default” for Commodity 1, you can still change account information for other commodity lines by clicking the “Amount” for the item you wish to revise the account information, ensure the correct item number is showing for the accounting details, click the

And change the account information and save.



Commodity Items

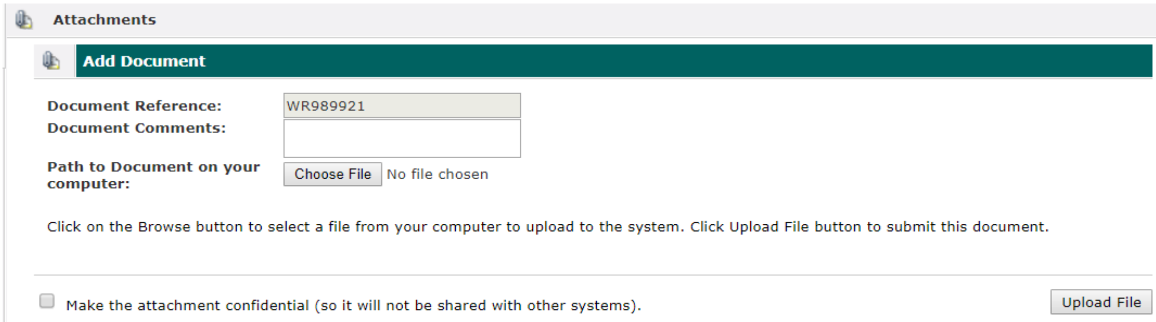
Item	Description	Qty	Unit	Unit $	Amount	Default
1	item No. 1	5.00	EA	25.0000	125.00	✔
2	Item No 2	3.00	CS	150.0000	450.00	
					575.00	

Accounting Items

Accounting Detail for Commodity Item 2

Line	Fund *	Orgn *	Acct *	Prog	Actv	Locn	Amount
1	10100	20	7314	9999			450
							450

6. To add an attachment to the WebReq, click Attach Additional Information. The system does not accept emails (.msg) files to be attached. If you have an email with details of the purchase, PDF the email to attach to the WebReq. It has been common practice to copy the test into the notes section, however, this is not secure and can be edited at any time, even after being posted to Banner.



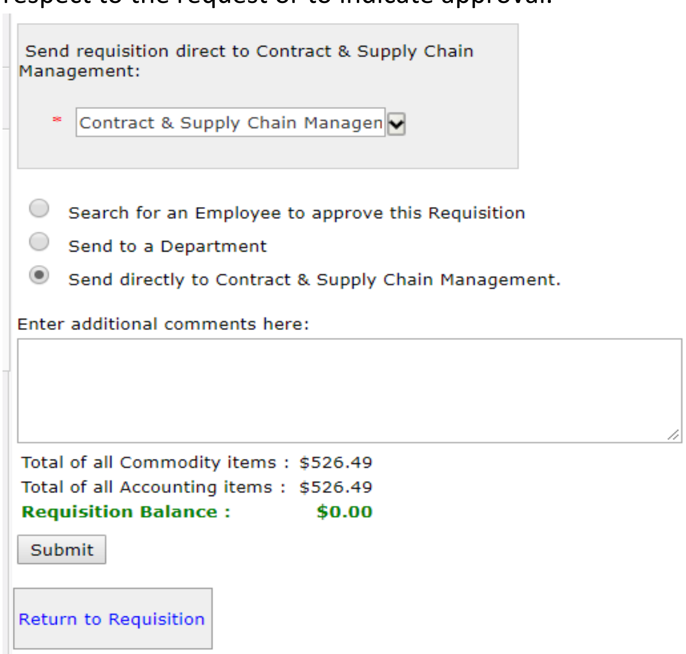
Add a brief description of the document being attached, choose the file and click “Upload” to finalize the attachment. You have the option to make the documents confidential, however, the WebReq cannot be viewed by anyone that has not had the WebReq pass through their queue, unless you are a member of the Contracts & Supply Chain Management department.

7. To add additional information to the WebReq, click 

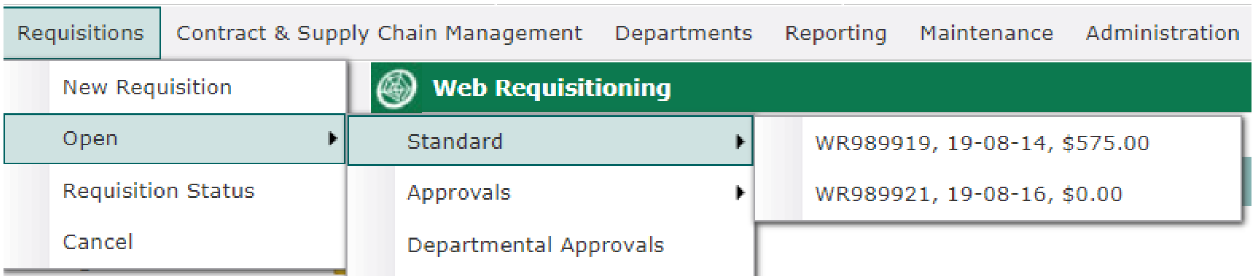
. Use this section of the WebReq to provide additional information required. The notes are not secure and can be changed at any time, therefore if you have information that will need to be securely attached to the WebReq, please create a document and attach to the WebReq.

8. Once you have entered all the information required, click “Submit”. Choose the recipient you are to send to and click “Submit”. The WebReq will be sent to the reciptient for their review and approval, if required. Once approved send directly to Contract & Supply Chain Management to have the request processed.

   There is an opportutnity in the comments box to provide the recipient with further details with respect to the request or to indicate approval.



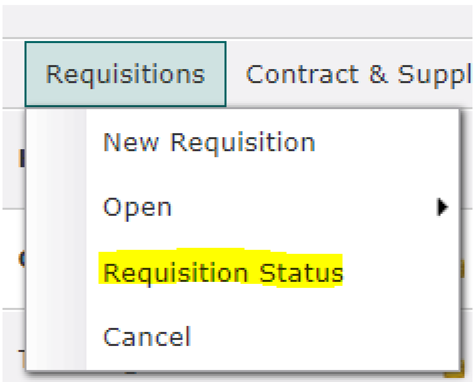
9. If you have started a WebReq and are ready to edit or finalize, click Requisitions > Open > Standard and click the WebReq you wish to work with.



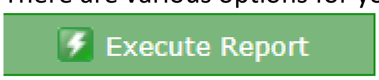
Monitoring the Status of a WebReq

You can look up to monitor or submit a WebReq at any time, however, you will only have access to WebReqs that you created or have had pass through your queue. You can also move the WebReq along by submitting to others at any time before it is posted to Banner to have the Purchase Order created.

10. To look up a WebReq click Requisitions > Requisition Status



11. There are various options for your search. Enter your search parameters and click



12. Your search results will indicate the following:

   a. If there is a red asterisk in the “Notes” field, this indicates there are notes associated to the WebReq, you can read and edit the notes at anytime
   b. If there is a red asterisk in the “Attach” field, this indicates there are attachments associated with the WebReq, you can add attachments at any time. Attachments cannot be deleted from a WebReq once it has been posted to Banner.
   c. If a checkmark is in the “Posted” field, this indicates the WebReq has been posted to Banner
   d. If a checkmark is in the “PO” field, this indicates a PO has been created. If you click the checkmark in the “PO” filed, you will be presented with a PO summary; you can click on the  to open the PO summary. The summary you are presented with it not the correct PO format, however, you will see the items ordered and the actual cost and account information.
   e. Whose queue the WebReq is currently in for approval.

Approving a WebReq

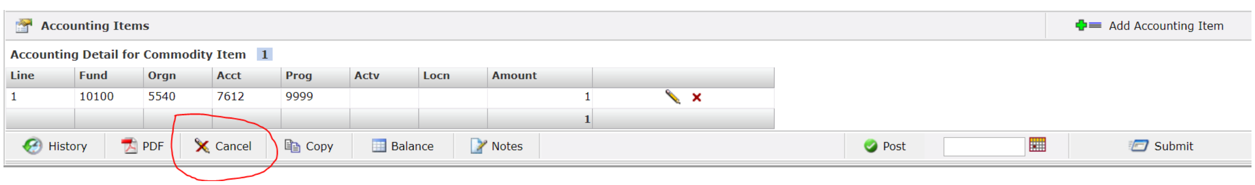
When a WebReq is sent to you for approval, you will receive an email notification. To review the WebReq click Requisitions > Open > Approvals.

Once you have reviewed the WebReq and are ready to approve or submit to the next person for approval, click “Submit”. Choose the recipient and click “Submit”. The WebReq will be sent to the recipient for their review and approval, if required. Once approved send directly to Contract & Supply Chain Management to have the request processed.

There is an opportunity in the comments box to provide the recipient with further details with respect to the request or to indicate approval.

Cancel a WebReq

Look up and open the WebReq you would like to cancel. Click on the “Cancel” along the bottom of the screen.



Choose the reason for cancelling the WebReq from the dropdown selection, you can add any comments you would like included in the email to the originator and click “Submit”.