TIP #1
When creating your requisition, only check off the "**attachment**" and/or "**quote**" box if you are going to be physically sending something to Purchasing that pertains to that WebReq. These boxes are to only be used if you are dropping off, faxing, or internal mailing a quote or an attachment. An attachment could be a sole source form, vendor information, credit application, travel authority form, etc. If you check one or both of these off and you are **NOT** physically sending any quotes or attachments to Purchasing, the processing of your requisition may be delayed as we await the arrival of the information you have indicated is being sent – but is not coming. These boxes are NOT to be checked off to indicate that you have electronically attached a quote or added additional information to your WebReq. WebReq indicates by a red asterisk(s) that a quote and/or additional information have been electronically attached. If you are sending additional paper work pertaining to the WebReq via fax, internal mail, or dropping it off to Purchasing, please check off the appropriate "attachment" and/or "quote" box on the WebReq and be sure and write the WebReq number on each sheet of paper prior to forwarding it to Purchasing.

TIP #2
If your WebReq requires approval from another individual and you are not sure whether that person has access to WebReq, please refer to the "List of Users" found at www.unbc.ca/purchasing/web_requisitions. If they are not on that list please contact Purchasing for a **temporary** work around. These people should then be encouraged to request access. For assistance with WebReq, please call Evelyn (5500) or Leslie (5006).

TIP #3
The type of information that is to go into the "Comments" field:

- if you know the quote number for the order that will be placed
- if there is a name of a person at the supplier end that the PO needs to go to the attention of the name of the agent used when travel has been booked

All other instructions for Purchasing should be entered in the "Add/Edit Requisition Notes" area. Click this button at the bottom of the screen and then the pencil, you can enter information regarding such matters as delivery instructions, urgency, previous orders, end users, etc. When entering information in this area, be sure and put your initials at the end. Click the button again to close "Requisition Notes". After the WebReq is saved, a red asterisk will appear beside the dialogue bubble indicating information has been added.

TIP #4
Here are a few things to take in to consideration when selecting the "Date Required" on your WebReq:

- pick a date that truly indicates when the goods or services are required
- where applicable, allow enough time for any approval tours the WebReq may need to go on
- allow enough time for Purchasing to process the requisition where applicable, allow enough time for the vendor to fill the order and for shipping

(for example, don't on March 5th create a requisition with a date required of March 7th that needs to go to another individual for coding, then another individual for additional approval, then to Purchasing where three quotes need to be obtained before a purchase order can be issued. The person may need it March 7th, but that isn't realistic and it is going to get hung up in someone's queue and they will not be able to proceed until they figure out that they need to select a new date)

How important is the "Date Required" on your WebReq?

- it is used by Purchasing in prioritizing work
- where applicable, it is used in decisions regarding shipping which can have an impact on your budget

What happens if you don't allow enough time on your WebReq?

- if it hasn't made it to the Purchasing queue, before the date you have selected, the individuals whose queue the WebReq is in, will NOT be able to forward the WebReq until such time as they select a new "Date Required".

Should you be trying to work with a WebReq that will not allow any further action, look beside the "Date Required" calendar to see if there is a red message "Date is not invalid". You will need to change the date in order to continue working with the WebReq and/or forwarding the WebReq. Remember, if you need to provide Purchasing with some more details about the date goods or services are required, please click on the dialogue bubble in the top right corner and enter the information there.

TIP #5

You can attach files electronically to a WebRequisition. These attachments could be quotes, vendor information, travel authority forms, etc. When creating a requisition, click on “Attach Additional Information” located at the bottom of the screen. A bright green plus sign should appear in the bottom right corner of the WebReq. Click on the bright green plus sign. Then when you click on the BROWSE button you will go into your computers directory where you can select a file. Once you have double clicked on this, the file name will appear. **REMEMBER** to then click on the UPLOAD file button. When the upload is complete, a summary will appear of what you have electronically attached. Here you can click on it to see what you have attached and/or you can delete what you have attached. When you are done attaching, click on the “Attach Additional Information” to proceed with the WebReq. Word or PDF files can be attached. You can attach as many files as you need to. Attachments can be viewed when the WebReq is created, when the WebReq is sent to you, or when in Requisition Status. A red asterisk beside the paperclip tells a person that a file has been attached electronically. Click on the paper clip to view. ***If you are attaching electronically, do not check off the little “attachment” box. You would only check this box off if you had paper work to go with you WebReq that you were sending to Puchasing via fax, internal mail, or drop-off. When this box is checked, we wait to process your WebReq until we have received the information you have indicated is coming to Purchasing via fax, internal mail, of drop-off***

TIP #6

After you have completed the first page of your WebReq, remember that if the dollar values are red this is the result of one of two things. One, you are out of balance – the amount you are requisition is more or less than the amount you are charging to a budget code(s) or you have not filled in and saved the Fund Org Account Information. In the first circumstance, if you are not sure why you have red numbers, press on the “Adobe Acrobat Icon” at the bottom left corner of the WebReq. This will provide you with a PDF of what has been entered. From here you should be able to see the dollar value being requested vs the accounting distribution. In the second circumstance, it is not necessary to complete the coding on occasions where the WebReq will be forwarded to another individual who will be doing so. For example, an administrative assistant who is not certain where the budget holder would like a purchase coded can create the WebReq and forward it to that individual for the fund org account to be completed. Please note, if you have red numbers due to one of the above reasons, you cannot have “send direct to Purchasing” as on option on page 2 of the WebReq.

TIP #8

One request we have is that you avoiding lumping several line items into one line item. For example, if you have been given a quote or something similar and it has been broken out into 3 different lines, each line with its own price, then you need to create a WebReq with 3 different lines. Remember, the quote needs to match the WebReq, which needs to match the PO, which needs to match the packing slip, which needs to match the invoice – otherwise, there will be delays in ordering, receiving, and payment. A line item that says see attached is not acceptable either. The details need to be on the purchase order to allow for receiving and paying.