SNOW COLLEGE

Using Web Finance Self Service at Snow College: Requisitions

https://badgerweb.snow.edu/dbprod/twbkwbis.P_WWWLogin

1. Logging onto Web Finance Self Service

To log on to the Web Finance Self Service area:

- Type this web address into any standard Web Browser (we suggests using Microsoft Internet Explorer): https://badgerweb.snow.edu/dbprod/twbkwbis.P_WWWLogin
- Click enter.

This will take you to a Production database. You'll see a menu of options on your screen as shown on Figure 1 below.

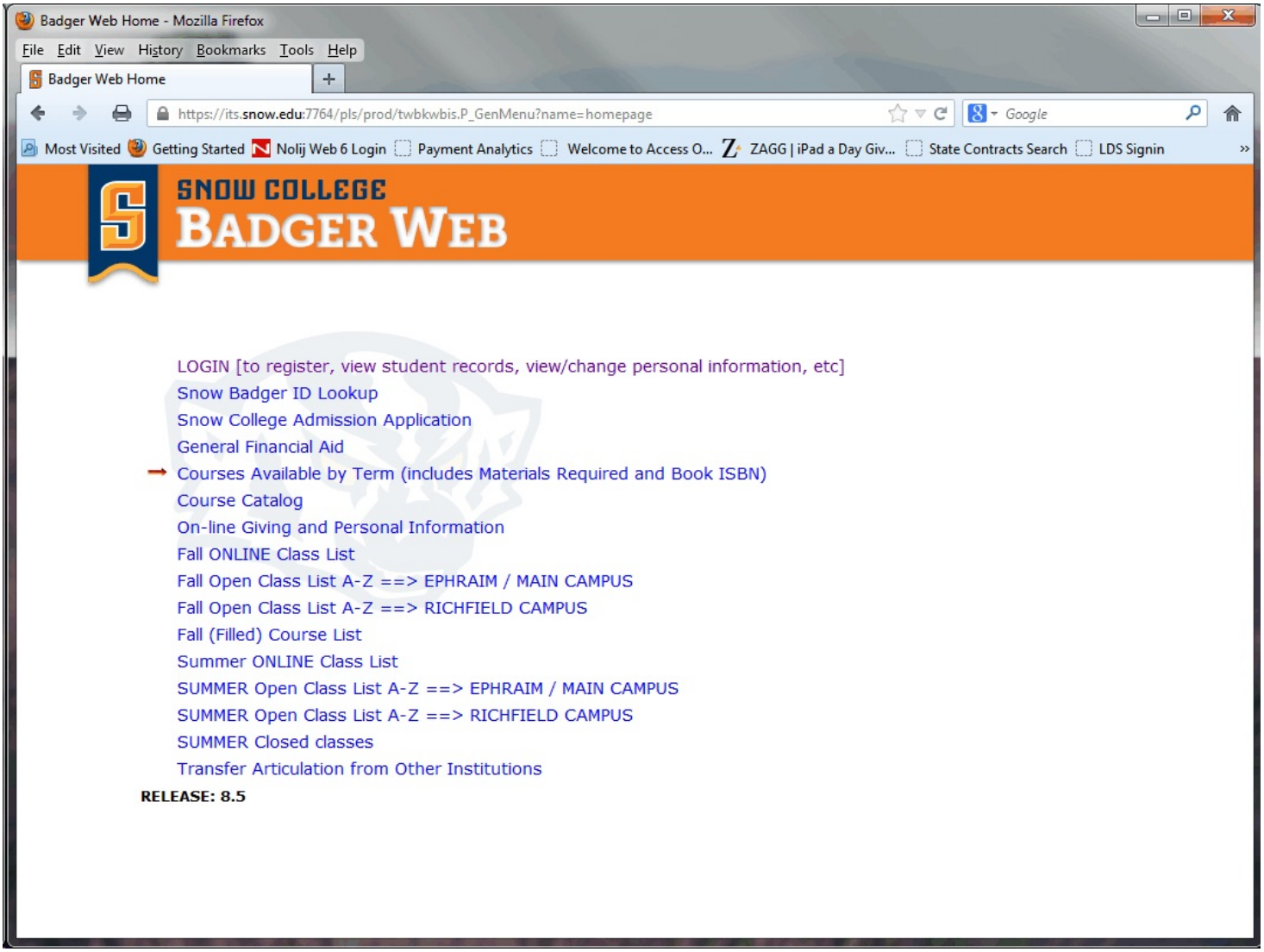

Figure 1

The menu will include “LOGIN” This is where Finance Self-Service is located.

- Click on “LOGIN.”

After clicking on “LOGIN,” you come to a login screen as shown in Figure 2.

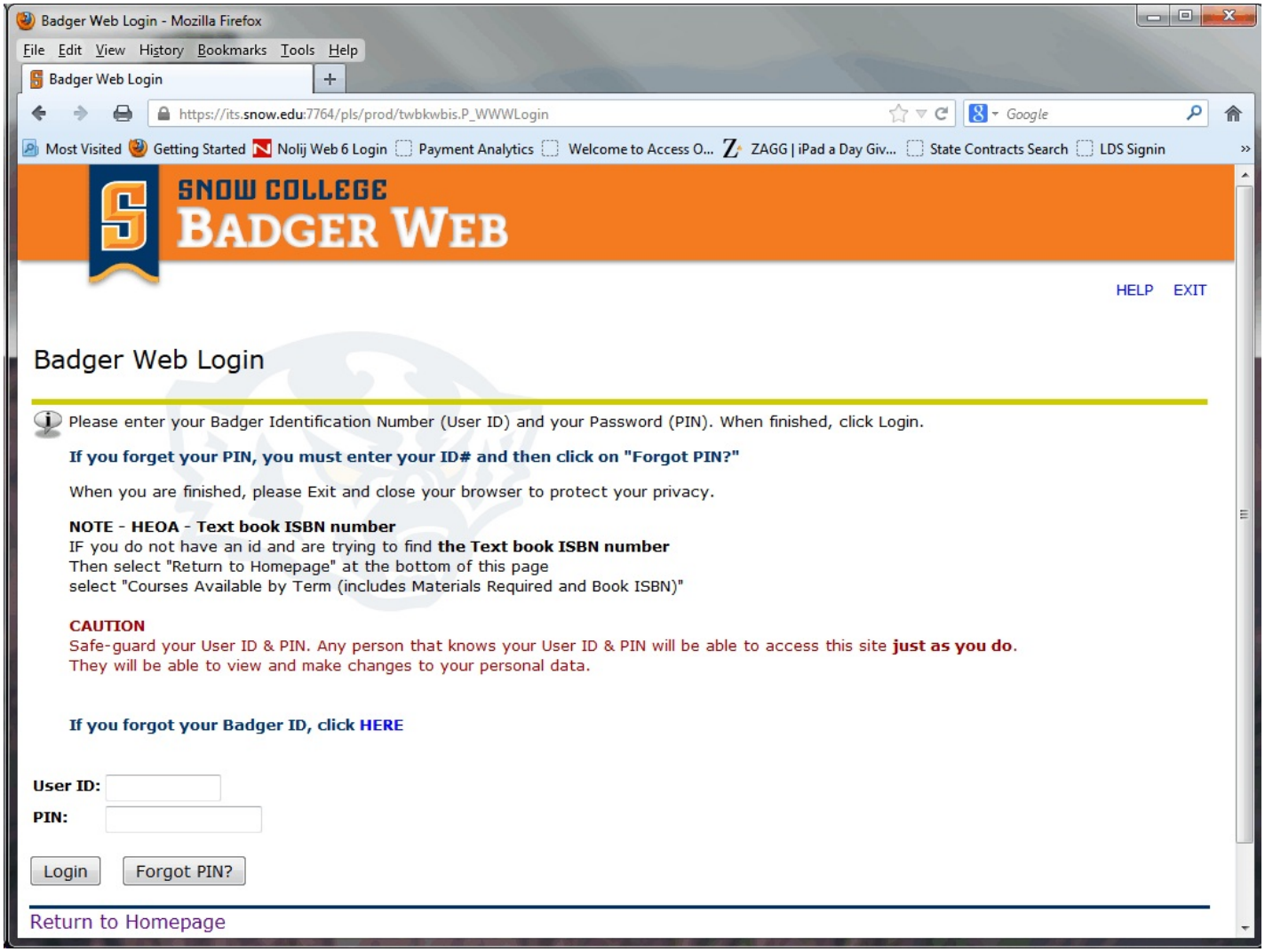

Figure 2

- To get access to the Finance Tab you need to contact the Controller’s office and get a “data access” form filled out and returned to them.
- Type in your Snow College User Name, which is your active directory (AD) login.
- Type in your Password
- Click on the “Login” button.

Now that you're logged in to Web Finance Self Service, here are some tips for getting around.

2. Navigation/Tips for Getting Around

- Tab or use mouse to click between fields (do not use "enter" key).
- Do not use browser "back" button
- Be aware that whenever you click on a button to perform an operation (i.e., submit, validate, etc.) you will be taken to the top of the screen. You may have to scroll down to see the information.

3. Main Menu

After logging into the Web System, there are two options that you can select: "Personal Information" and "Finance" as show in Figure 3.

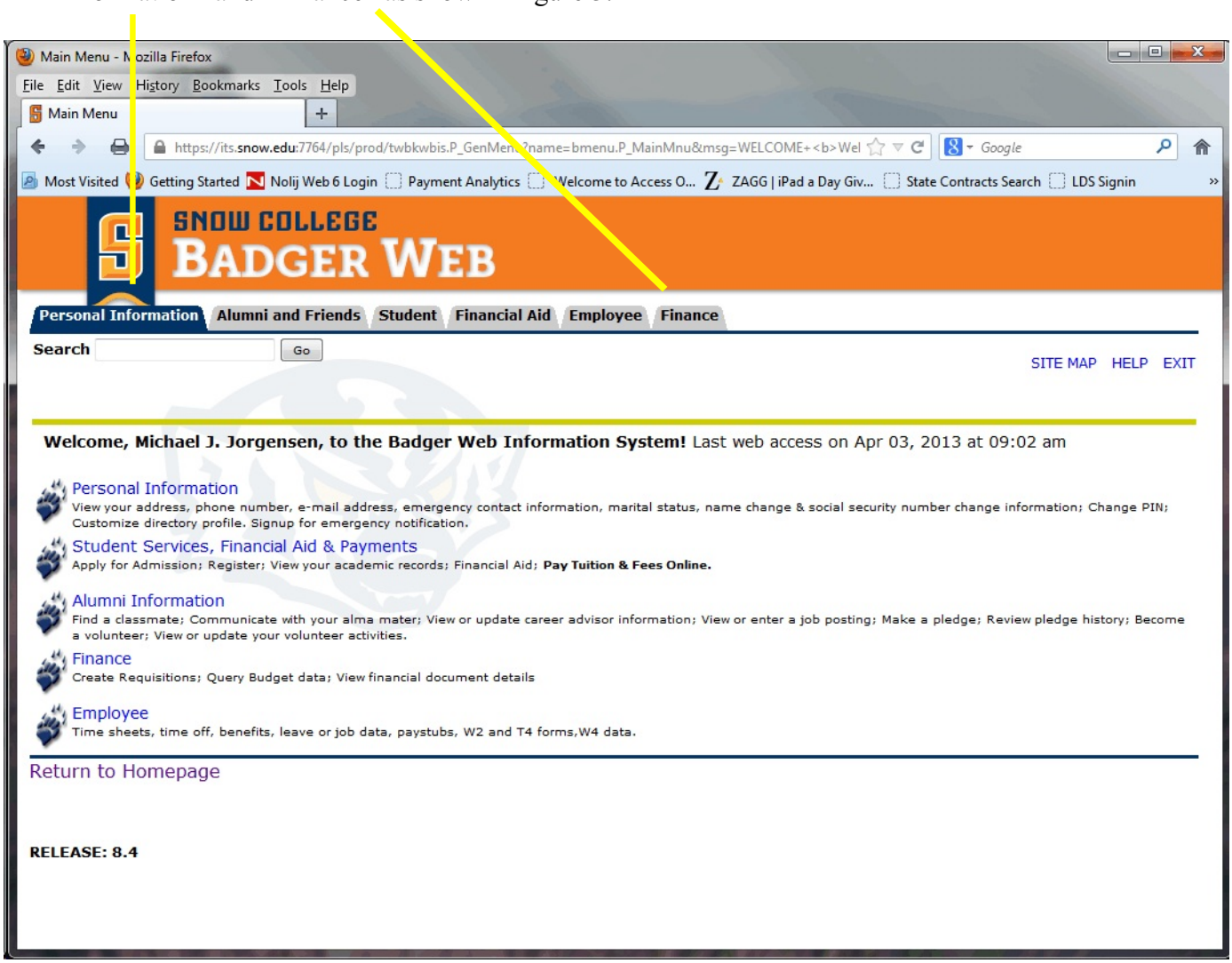

Figure 3

- Next, click on “Finance.” You should get a screen like below - Figure 4.

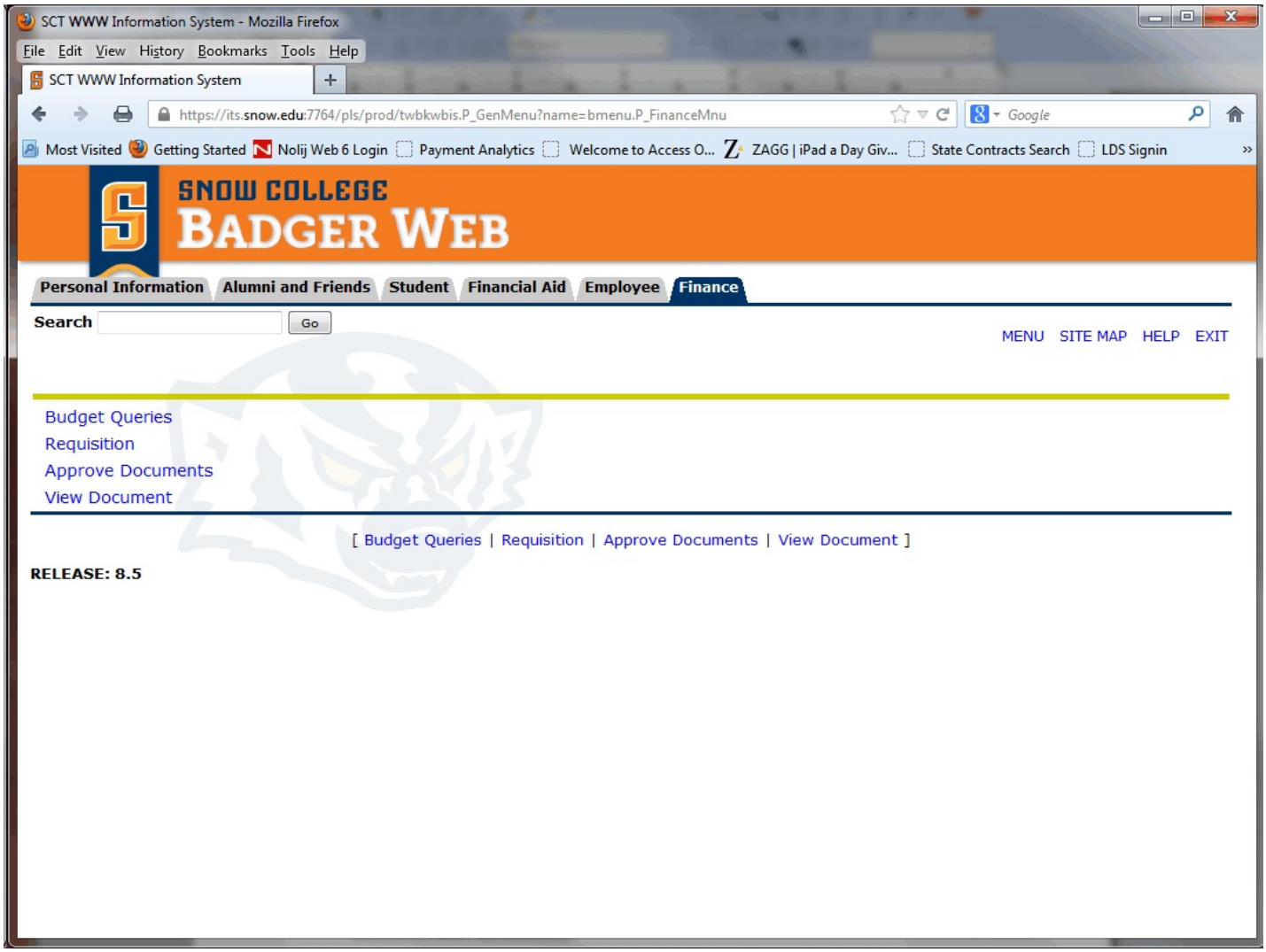

Figure 4

You will be interested in three options: “Budget Queries”, “Requisition,” and “View Documents.”

- In “Budget Queries,” you will be able to check balances and get other information regarding your Lynx financial accounts (refer to “Budget Queries” document and training session for more information).

- In “View Documents,” you will be able to view your different documents.

- In “Requisition”, you will be able to do an on-line requisition. This is explained in the rest of this document.

4. Creating a Requisition in Finance Self-Service

- Click "Requisition" as noted in Figure 4, above.

- Note: Some information (i.e., name, e-mail, telephone, etc.) will be added for you by the system. If the information is not correct, contact Controller's Office at extension 7263.

After clicking "Requisition," you will see the screen as noted below in Figure 5.

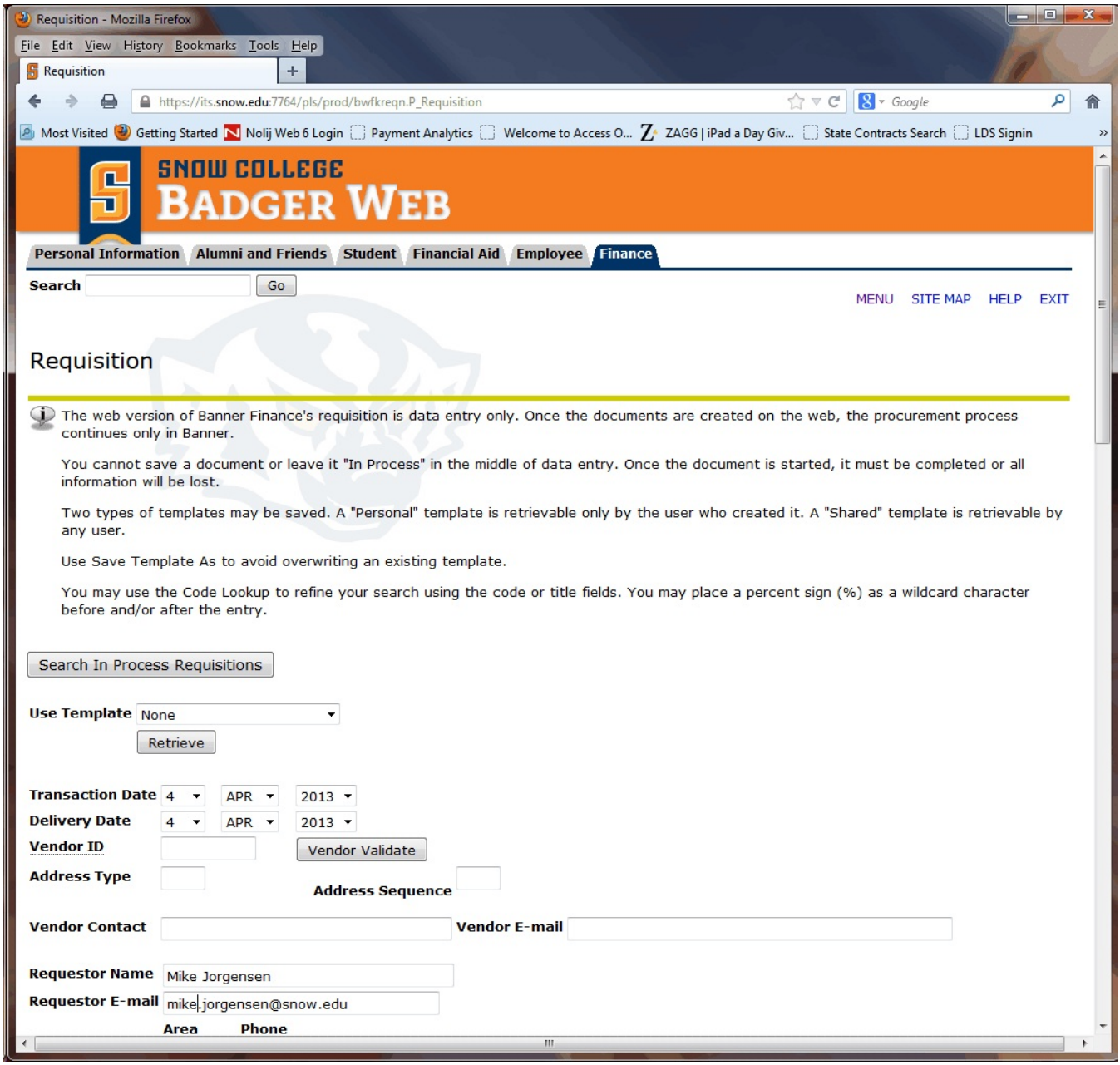

Figure 5

Note: Ignore the information regarding "Use Template" (in the middle of the screen figure 5). This information will be discussed later.

- Change the date information ("Transaction Date" and "Delivery Date") as appropriate, using the drop-down boxes.

- Leave the "Vendor ID," "Address Type," "Address Sequence," and "Vendor E-mail" fields blank. Ignore "Vendor Validate."

You may recommend a vendor under "Comments."

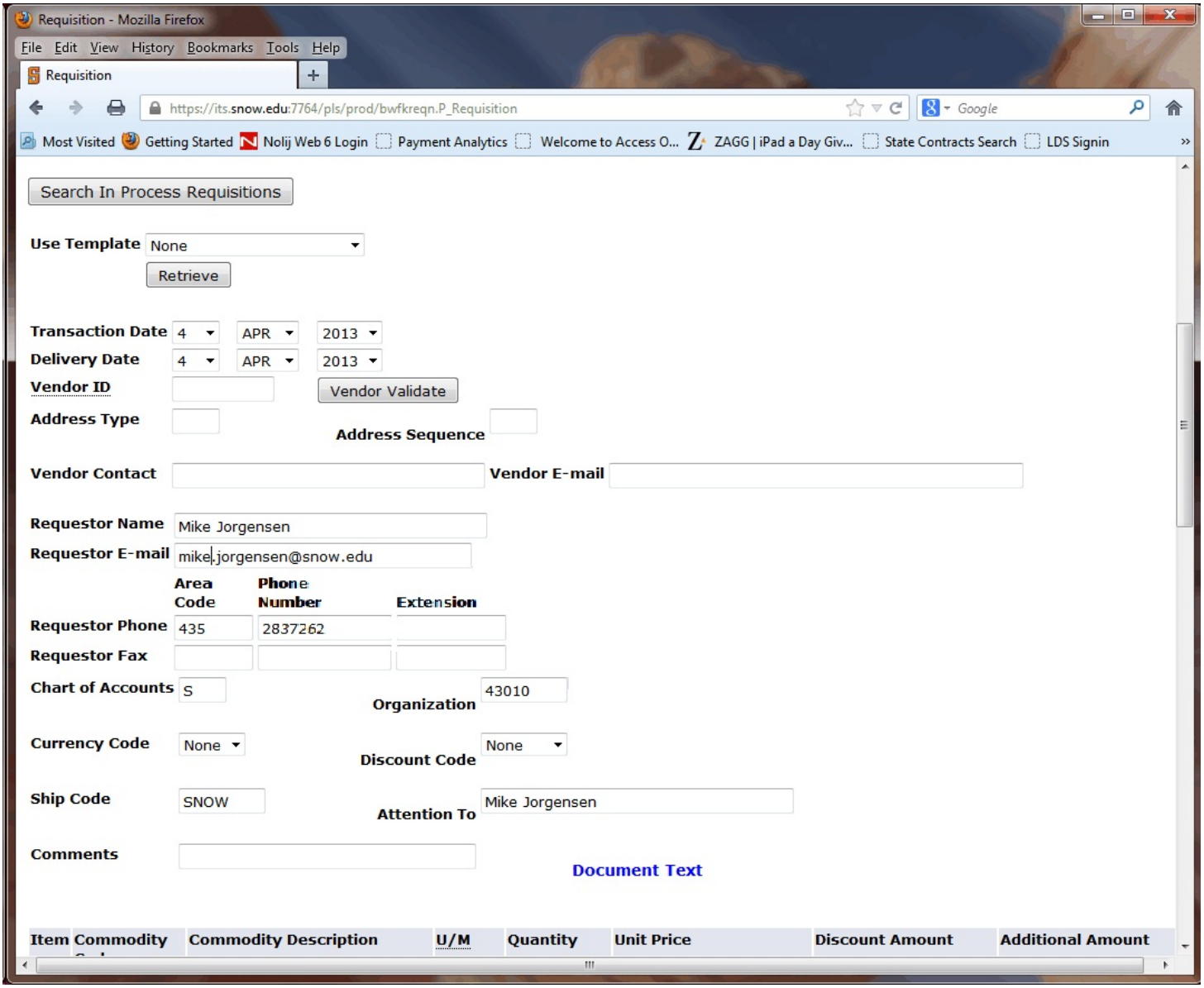

Figure 6

If we have not ordered from this vendor since July 1, 2010, you will need to put a "NV-" in front of the recommended vendor, (ex. NV- Paradise Press). You will then need to go to Document Text and in the Document Text "**no print**" (see Figure 7) put in the company name, address information, a phone #, and fax # if possible, so we can contact them for the correct information (this new system requires, Tax ID, and both the ordering address and the remit to address before we can place a purchase order).

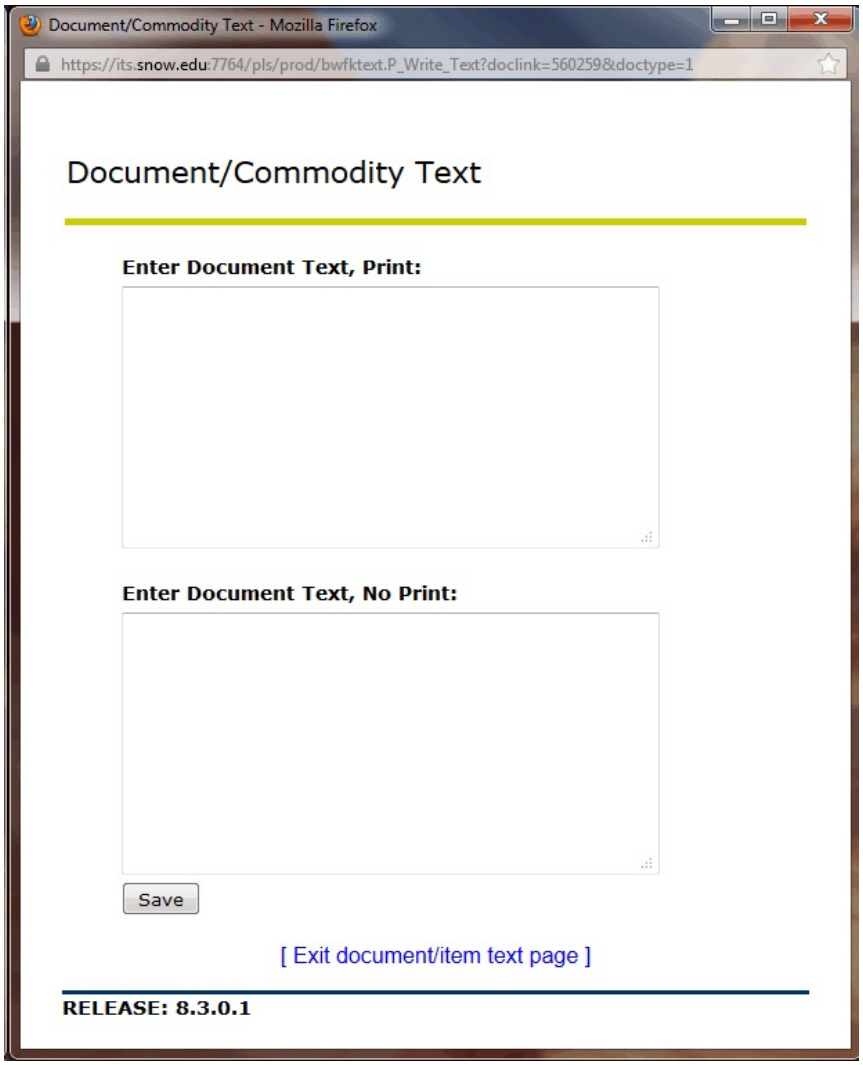

Figure 7

- If you have special instructions for the Purchasing Department, you can make those comments in the "Comments" field (ex. Standing Order) or click on "Document Text" and put them there.

- You can enter "Document Text" in either the "print" or "no print".

- Be certain to click on the "SAVE" button at the bottom of the window.

- After you receive the message that the document text has been saved, close the window.

Note: If you are forwarding backup documentation through the mail, note this in the "Document Text" or "Comments" sections.

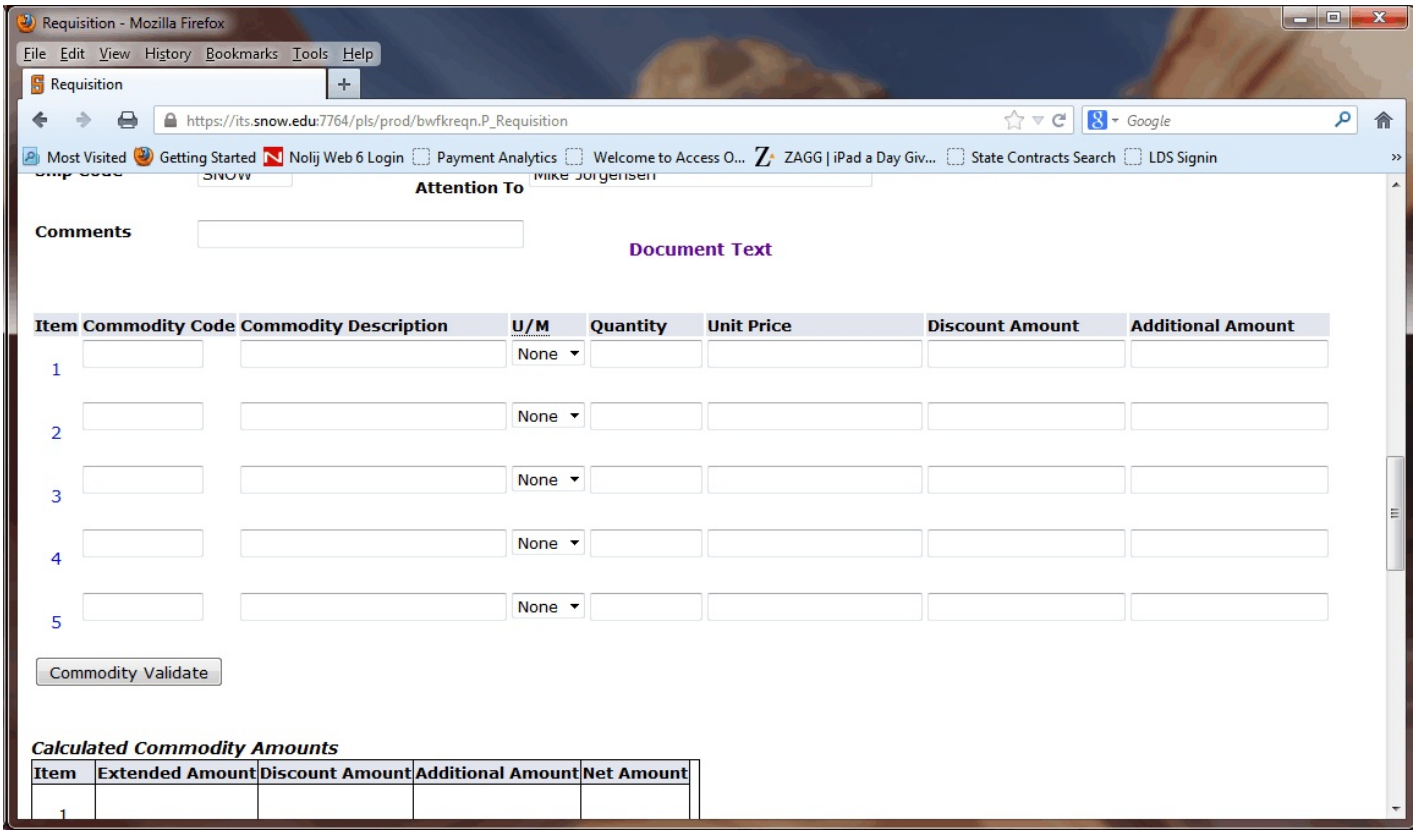

Figure 8

As you page down through the "Requisition" document, you will see more fields as shown above in Figure 8.

Enter the items you want to purchase, as described below.

- "Commodity Code" is not used at this time – **leave blank**.
- "Commodity Description" – Enter the item(s) description (max. length of 50 characters) of what you want to purchase. If you need to provide more information, click on line item number at the left of "Commodity Code."
- Clicking on the line item number will allow you to enter more commodity information in either the "print" or "no print" (see figure 9).

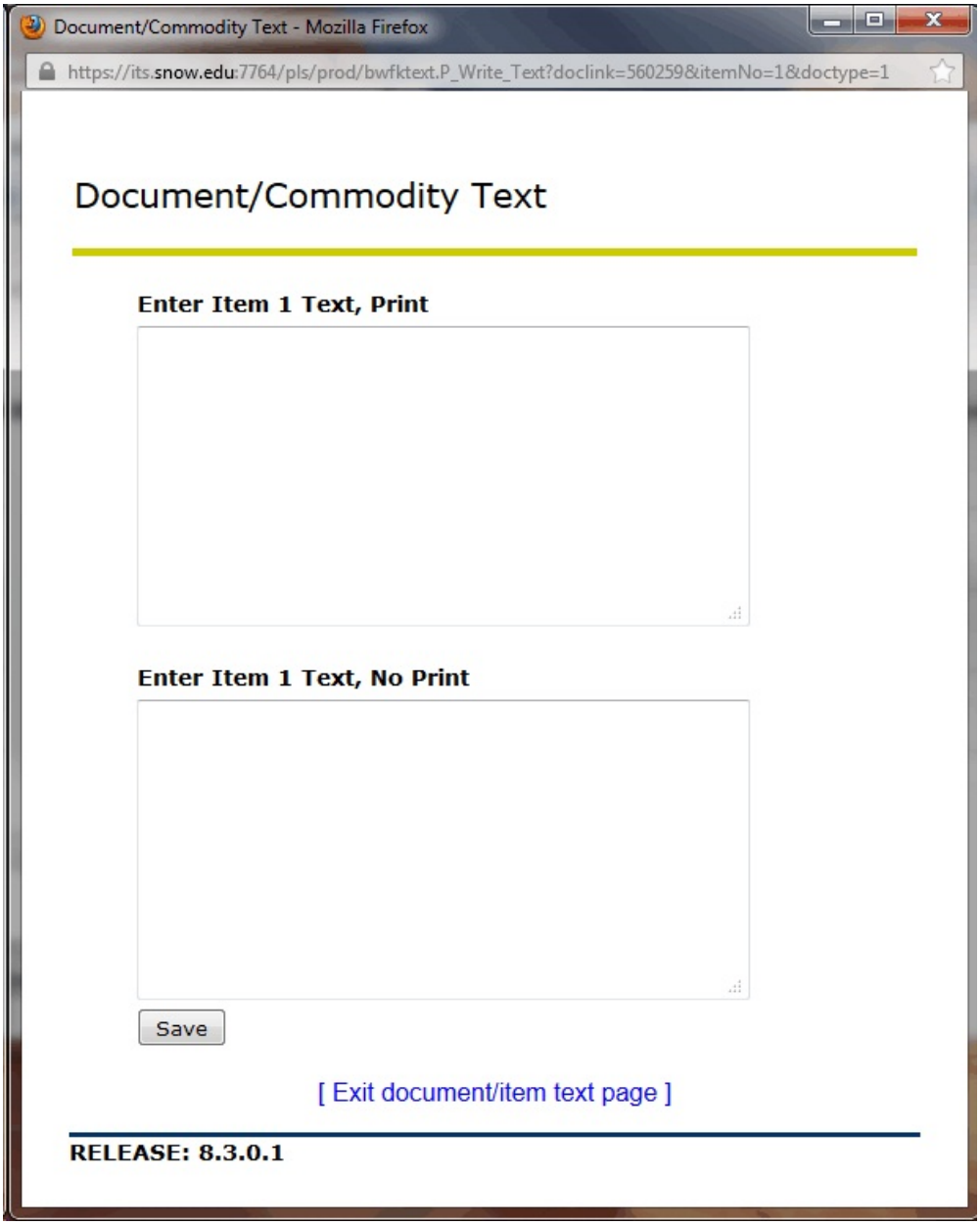

Figure 9

- Be certain to click on the save button at the bottom of the window.
- After you receive the message that the document text has been saved, close the window.
- "U/M" = Enter the unit of measure. You can click the down arrow and will be given the options of what is available.
- "Quantity" -- Enter the number of items you want.
- "Unit Price" -- Enter the price of each item.

Use tab to enter additional items. The maximum line items you can enter is five (5). You must create an additional requisition for more than five (5) different line items.

Note: If you have more than 5 line items you will need to do another requisition. If you do, in the "comments" box (see figure 6), put in there 1 of 2 (or how many requisitions - example 3 if over 10 line items)

Entering the account information (how you will pay for the purchase), follow these instructions. (See Figure 10)

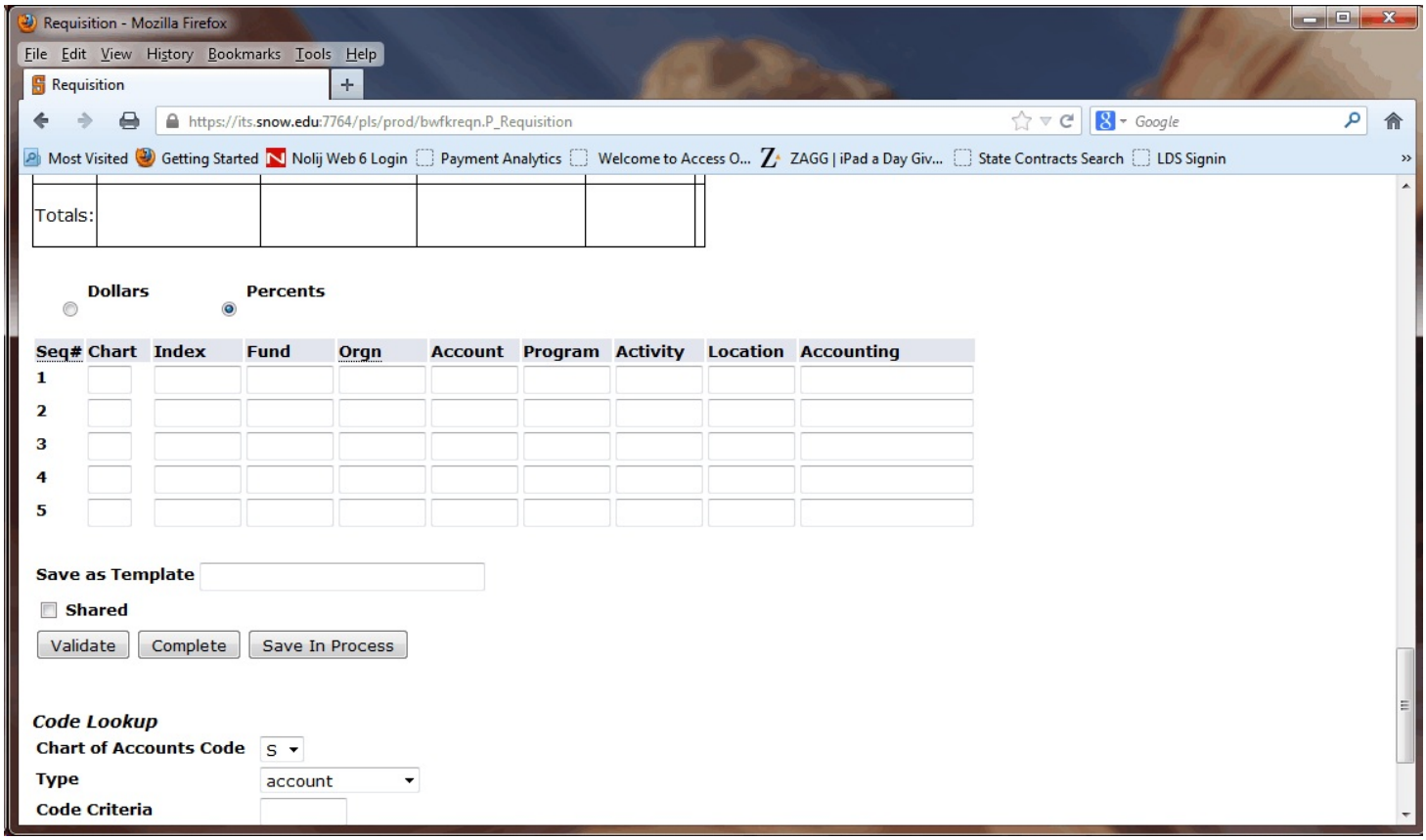

Figure 10

- First you will need to decide if you are using one or more cost-codes to pay for these items.
    - If you are using just one cost-code please leave the selection on "Percents".
    - If you are using more than one cost-code you will need to decide if you want to distribute the money by percentage or dollars to each account. Once you decide, click on the appropriate circle "Dollars" or "Percents".
- Next, you must enter "S" under "Chart."
- Enter your five or six-digit cost-code in the "Index" box.

- If you are using one account to pay for your purchase, enter 100 under the "Accounting" field. Leave the "dollars/percent" option as "percent."

- Next, Click the "Validate" button. This may return error messages, but ignore them and scroll back down to the account information. You will see that the fund, organization, and progam have been filled in for you. (If this information is NOT filled in, you either have an incorrect number or you forgot the "S" under "Chart."). It will take you back to the top of the screen and it will look like this (Figure 11).

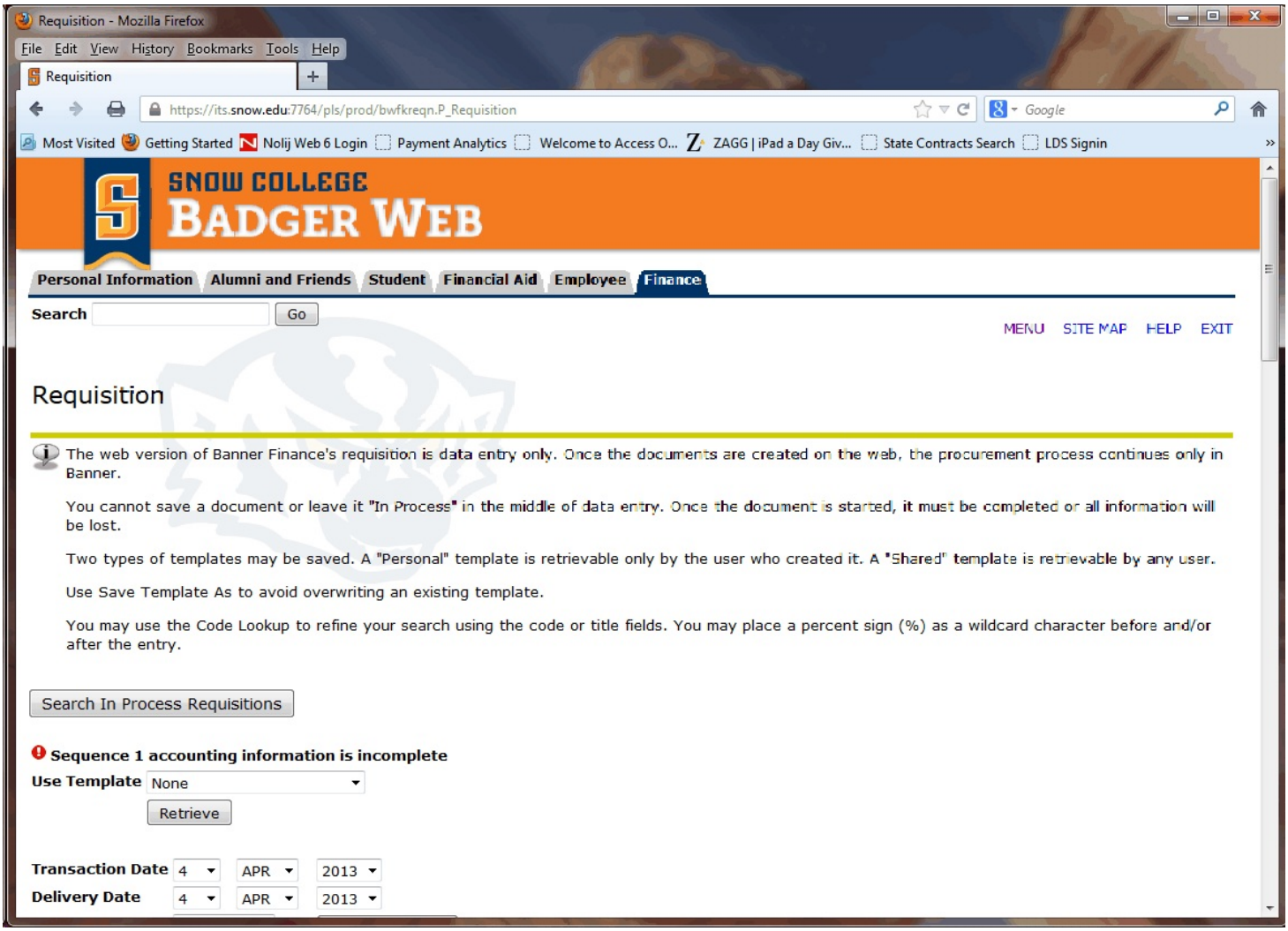

Figure 11

- Scroll back down and fill in the "Account" field. Please put in the number 7399 (See Figure 12).

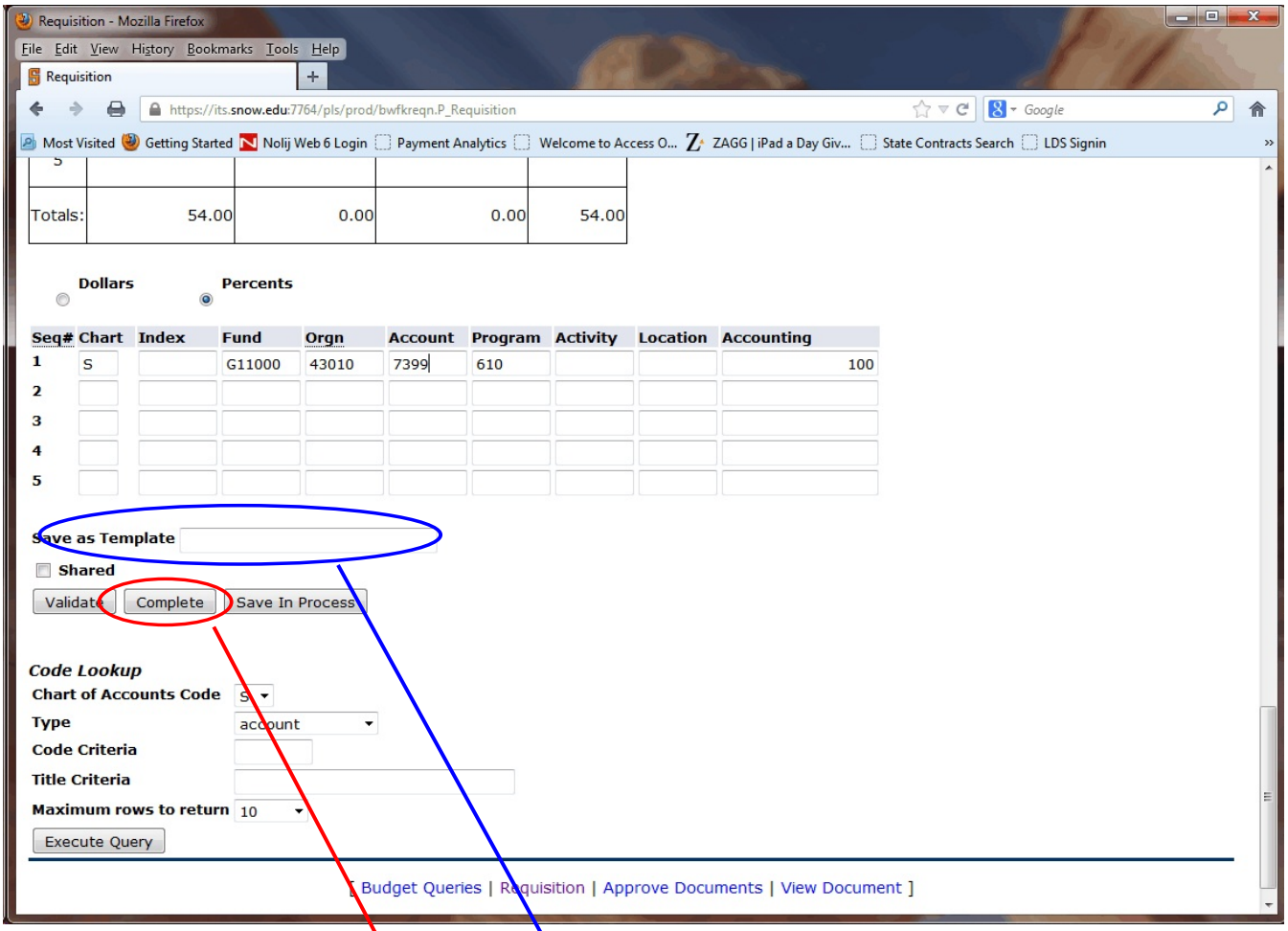

Figure 12

- If you are using more than one account, indicate the amount split by indicating how much to charge to each account by using dollars or percent. Note: If you use percentage, make certain it totals 100%; if you use dollars, make certain it totals the correct grand total.

- Use this box to save your requisition as a template.

This will allow you to retrieve the requisition information to be used again in the future. Do not check the "shared" box. If you do, this will allow the entire campus to use your template.

- To submit the requisition, click on "Complete." (Under the "Save as Template" and next to the "Validate" button).

If accepted, the following boxes (or something similar) will be displayed at the top of the webpage. Figure 13.

Note: Be certain to write down your document number for future tracking purposes.

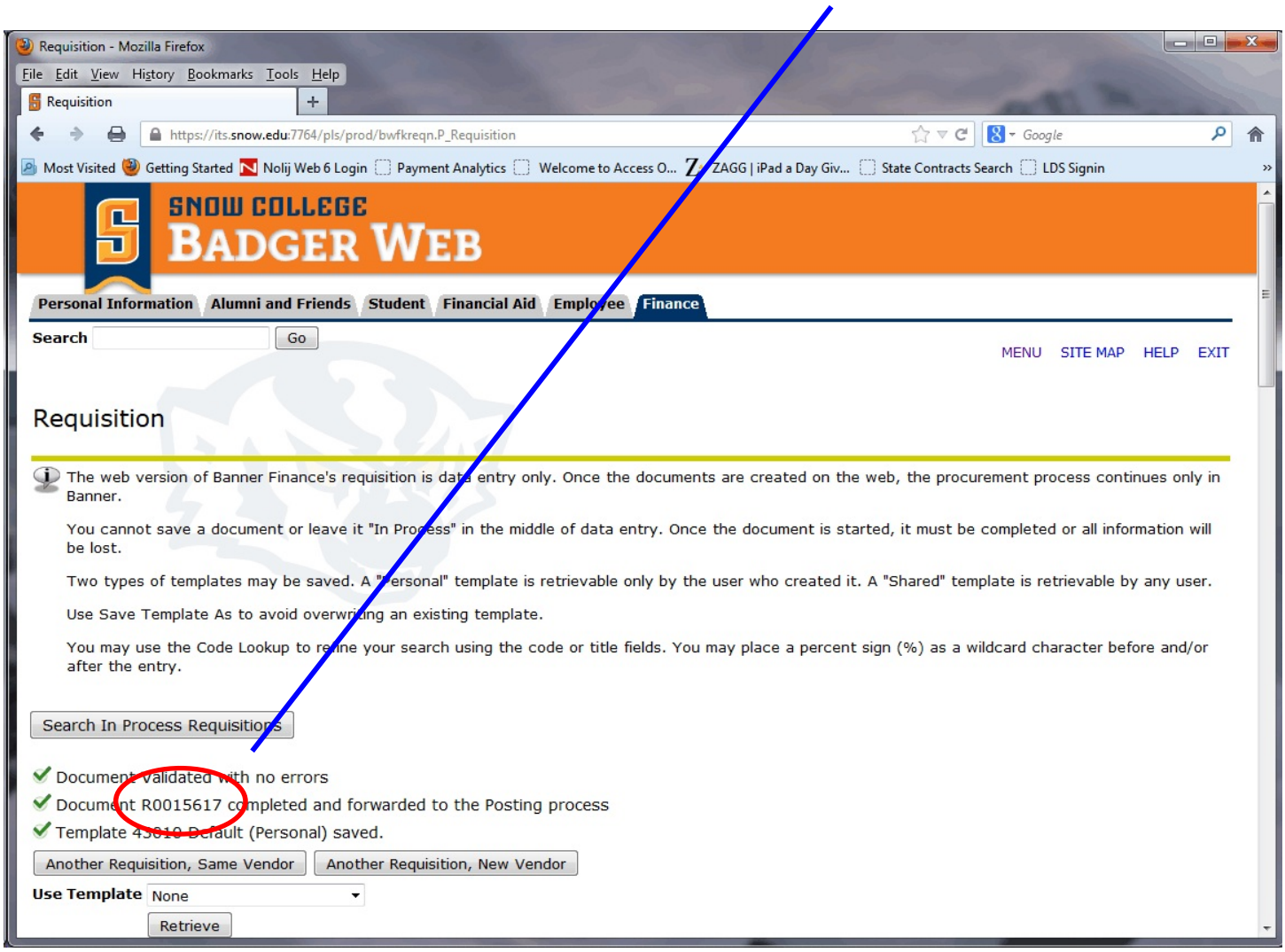

Figure 13

Here you can do another requisition, click on Finance and do other things, or Exit. If you Exit you will get a screen as shown in Figure 14.

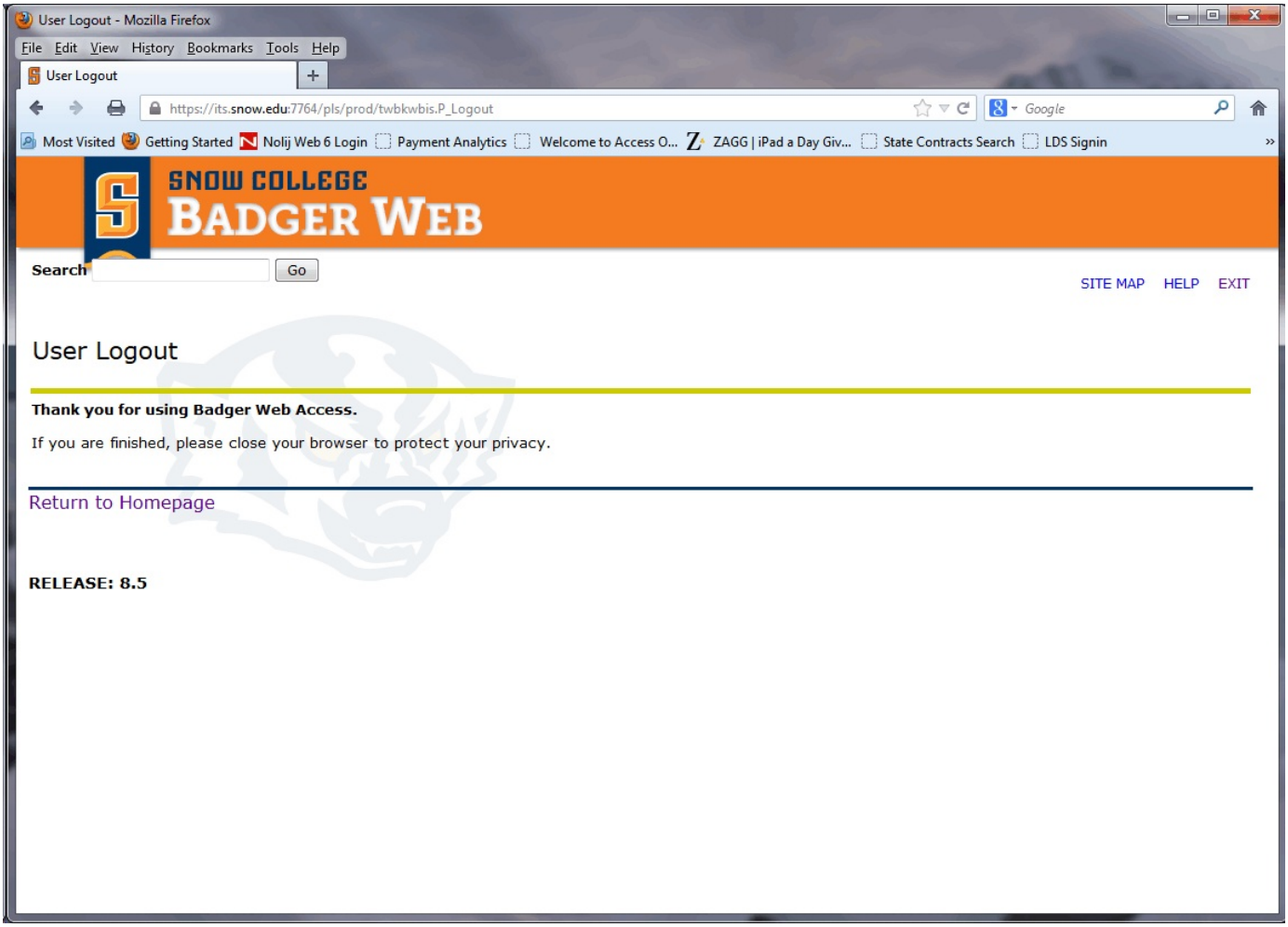

Figure 14

Congratulations, you have completed your requisition.

If you have any questions please call the Purchasing Office at 7262 or 7260.