

Approving Online Purchase Requisitions UIWeb 4.2 or 4.3

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Approving Online Purchase Requisitions - UIWeb

If you have not used the new web version of Colleague before, please refer to the "[Colleague User Interface 4.3 – Basic New Features UIWeb](#)" document or the demo provided when opening the Datatel UIWeb version of Colleague to help you get familiar with basic changes.

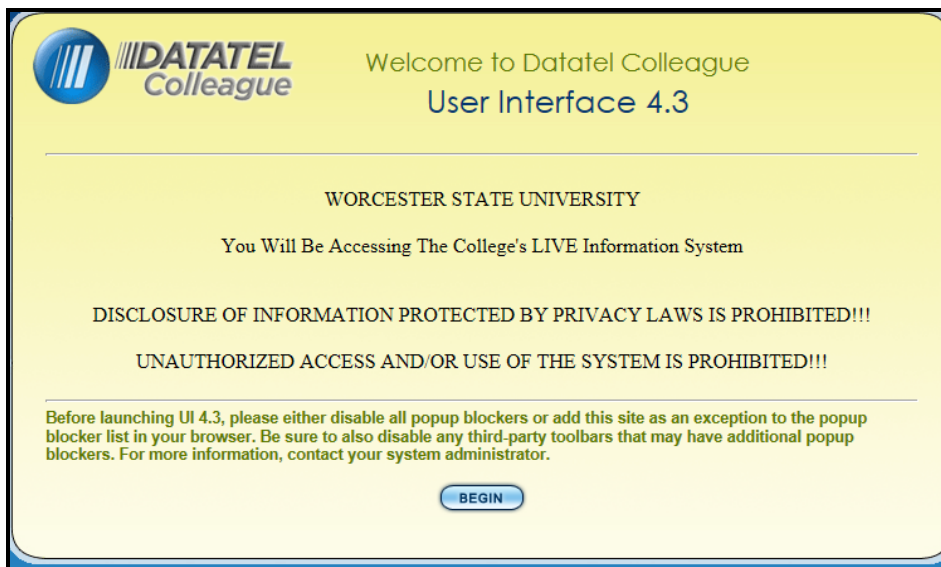
Refer to "[UIWeb 4.3 Newest Feature Changes](#)" to explore some beneficial additions.

Logging Into Datatel UIWeb 4.3

1. Double-click the **UIWeb** icon  on your Desktop.

Datatel's Colleague User Interface 4.3, now known as UIWeb, launches and a welcome screen displays.

If you have difficulty, keep only basic Internet Explorer (or Firefox) toolbars available. Close toolbars such a "Google". Then, see if UIWeb launches.



2. Click the **Begin** button to access the Login screen.



3. In the **UserID** box, type your **Colleague UserID** provided to you by Information Technologies.

Your Colleague UserID MUST be typed in all caps.

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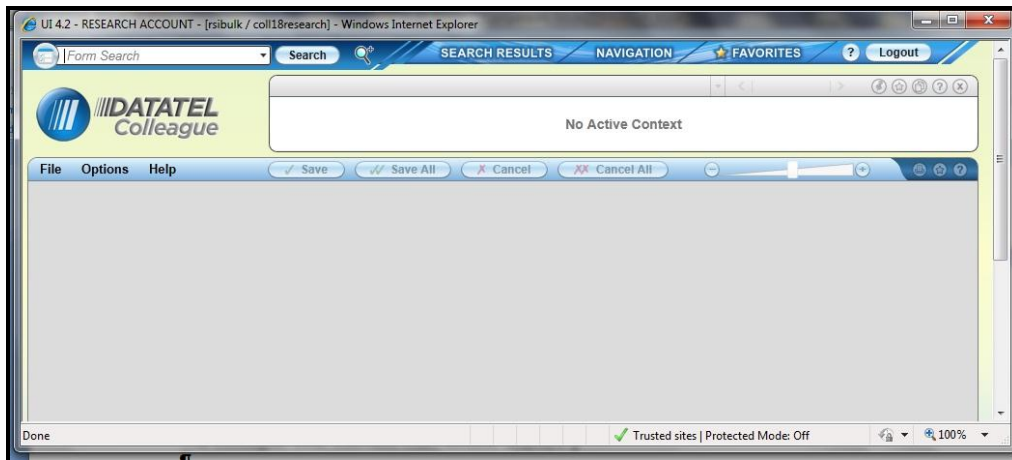
Logging into Colleague UIWeb

4. In the **Password box**, type your Colleague password. Then, click the **LOGIN** button or press the **<Enter>** key.

An “authentication” screen followed by a system message containing the name of the Colleague account you are logging into will display.

5. Click **<OK>** or press the **<Enter>** key to proceed.

The Colleague UIWeb main window displays.



Approving Online Purchase Requisitions - UIWeb

Creating an Approval Password

MANDATORY STEP: In order to ensure security, Information Technologies requires approvers to immediately assign an approval password to their account.

This procedure also can be used at any time to change an existing Approvals password.

It is a good idea to follow the same naming conventions that are used when creating a WSU Network password (8 characters in length and include 1 upper case letter + 1 lower case letter + 1 number).

Creating an Approval Password

1. In the **Search** area, click the round **Person/Form** button until a **Form** displays on the front of the button.
2. Type **APPW** (Approval Password maintenance) in the Search box, and click the **Search button** or Press <Enter>.

The APPW – Approval Password Maintenance form displays with the Approvals Lookup dialog box active.

A screenshot of a software dialog box titled "Approvals LookUp". The dialog has a light yellow background and a black border. At the top, the title "Approvals LookUp" is displayed. Below the title is a white text input field with a vertical cursor on the left. At the bottom of the dialog, there are four blue buttons with white text: "OK", "Cancel", "Finish", and "Help".

If the APPW – Approval Password Maintenance form did not display, proceed to the next page to learn how to access it from the Navigation tab.

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Creating an Approval Password

If the APPW-Approval Password Maintenance form and Approval Lookup dialog box did not display, the APPW icon can be accessed from the Navigation tab.

- a. On the right-hand side of the Search area, click the **Navigation** tab to bring it to the front of the other tabs.
- b. If the **CF** application is not selected, choose it from the **Application** drop-down menu.

Items you are authorized to use will be listed.



- c. Click the **black triangle to the left of Purchasing - PU** to expand and display its contents.
- d. Expand **Approvals – APR**. Then, **double-click the Approval Password Maintenance – APPW** icon.

The APPW – Approval Password Maintenance form and Approvals Lookup dialog box should display.

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Creating an Approval Password

3. Type your **Colleague (UNIX) Username** (in CAPS) in the Approvals Lookup box and click **OK**.



The "Enter the password for the approval ID..." dialog box displays.



4. Type the **Approval Password** that you would like to use and click **OK**.

You will be prompted to Re-enter the Password.

5. **Re-enter the Password** and click **OK**.

You will be returned to the APPW Password Maintenance screen.



6. Click the **Save** button to save the approval password.

This step is extremely important to make certain the password is saved and proper authorization for purchases is maintained.

The Update record, Cancel record, or Return to editing Alert displays.

7. Click the **<Update>** button and click **<OK>** or Press **<Enter>**.

The Approvals lookup prompt displays.

8. Click on the **Finish** button to return to the main User Interface screen.

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- All Purchase Requisitions need at least two approvals. For purchases under \$20,000, two approvals are required.
 1. Department Budget Manager
 2. Procurement Office Representative (e.g. B. Campbell or A. Sobiech)
- For purchases over \$20,000, the name of the Worcester State University Chief Financial Officer (e.g. K. Eithelroth) must be added as a third approval name.
- If an approver creates a purchase requisition, the approval can be entered while working on the APRV-Approval Screen. Most often, it will be added when approving all requisitions needing approval using the APRN – Approvals needed screen.

Approving an Existing Purchase Requisition

1. **Log into Colleague UIWeb**, if you have not already done so.
2. In the **Search** area, click the radio button (circle) to the left of **Form** to select it.
3. Type **APRN** (Approvals Needed) in the **Search box**, and click the **Search button** or Press <Enter>.

The APRN –Approvals Needed Authorization Lookup dialog box displays.



Authorization LookUp

OK Cancel Finish Help

- If the APRN – Approvals Needed Authorization Lookup box and form do not display, proceed to the directions below to access the form using the Colleague UIWeb Navigation tab.
 - a. On the right-hand side of the Search area, click the **Navigation** tab.
 - b. If the **CF** application is not selected, choose it from the **Application** drop-down menu.

Items you are authorized to access will be listed.

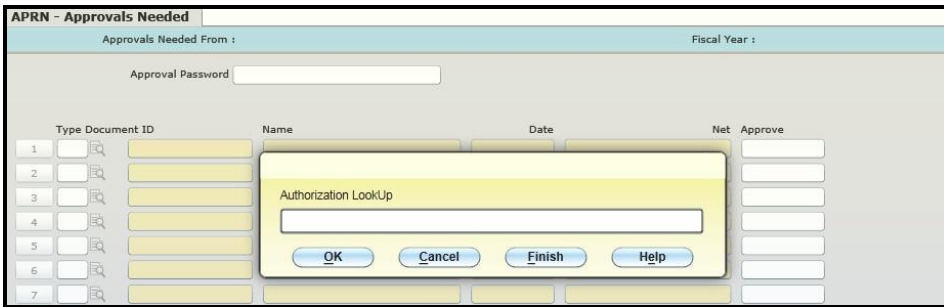


Approving Online Purchase Requisitions - UIWeb

Approving an Existing Purchase Requisition (Continued)

- c. Click the **black triangle to the left of Purchasing - PU** to expand and display its contents.
- d. **Expand Approvals – APR.** Then, **double-click the Approvals Needed - APRN icon.**

The Approvals Needed form displays with an **Authorization Lookup** dialog box in front.



- 4. Type your **Colleague (UNIX) Username (Caps)** in the Authorization Lookup dialog box and click **OK**.

A Fiscal Year Lookup dialog box displays.



- 5. Type the **Fiscal Year** for the budget in which the purchase requisition was placed and click **OK** or Press <Enter>.

If an approval password was created, the "Enter your approval password" dialog box displays. **If an approval password was not created, make certain to use APPW and create one.**




- 6. Type your approval password and click **OK**.

Providing a password helps ensure that only the authorized "approver" will be approving the purchase of the requested item(s).

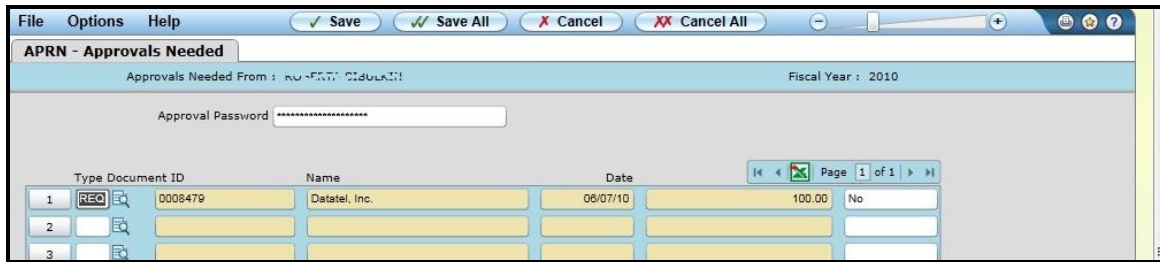
Approving Online Purchase Requisitions - UIWeb

Approving an Existing Purchase Requisition (Continued)

Individual requisitions can be marked for approval by typing a **Y** in the Approve box to the right of the requisition and Pressing <Enter>.

Other items, such as **Budget entry approvals or approvals created in a month that is closed, require use of the Detail button**  in the desired REQ (Requisition) row to open and view the Requisition Maintenance or other desired screen.

Requisitions created in a month that is closed display an alert message: 'Transaction date is not in an open month. Detail to maintain'. Click OK after reading the alert message to proceed.



7. When the **APRN** screen displays, type **Y** in place of the 'No' in the **Approve column**, to give your approval to the requisition and all of its line items. Once your approval has been given to the requisition, the "No" will change to "Approved".

If you wish to review some line items or because the following Transaction date alert displays, proceed to steps A-D below to Detail in to review requisition line items individually before approving the requisition.



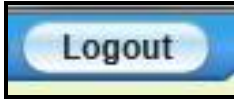
- A. Click the **Detail** button to open the item you wish to approve.
- B. Click the Detail button to the right of the **Approvals** field/box.
- C. In the first available box under **Approvals** (left-hand column on the APRV screen), type your **Unix/Colleague Username** (e.g. JLANCER OR KJONES) and Press <Enter>.

Your approval name should move from the Next Approvals column to the Approvals column.
- D. Click **Save** and **Update**.
- E. Click **Finish** if necessary, to return to the main Colleague UIWEB window.

Approving Online Purchase Requisitions - UIWeb

Logging Out of Colleague User Interface 4.2 UIWeb

1. If you are finished using Colleague UIWeb 4.2, make certain to **Logout** using by clicking the **Logout button** on the upper right-hand side of the UIWeb window.



2. Close the browser window.