

Approving a Requisition or Payment Request Online

Select Colleague Web Access from the <http://www.stlawu.edu/business/datatel.html>.

Users will be prompted to enter their network ID and password. This is the same ID and password used to log in to your university computer each day. Once logged on, users should see web access options as shown below and select as indicated.

The screenshot displays a web portal interface with several sections:

- Announcements:** A message from "tester - entire portalz" dated 1/25/2011 8:41 PM, by Tony Dashnaw.
- My Feeds:** Includes "Campus News" and "Campus Events".
- My Team Sites / My Document Library:** Features "Expand All", "Collapse All", and "Other" options.
- Colleague Web Access:** A vertical menu with the following items:
 - Employee Profile
 - Time Entry and Approval
 - Financial Information (highlighted by a callout)
 - Budgeting
 - Payments
 - Purchase Orders
 - Requisitions
- My Bookmarks:** An empty section.
- Pictures of the Week:** An empty section.

A callout box on the right side of the "Colleague Web Access" menu points to the "Financial Information" option with the text "Select Financial Information".

The screenshot shows a web portal with several sections:

- Announcements:** A message from 'tester - entire portalz' dated 1/25/2011 8:41 PM, sent by Tony Dashnaw.
- My Feeds:** Includes 'Campus News' and 'Campus Events' with a refresh icon.
- My Team Sites / My Document Library:** Features 'Expand All', 'Collapse All', and 'Other' options with a refresh icon.
- Colleague Web Access:** Contains a menu with 'Main Menu', 'Financial Information', and 'Approve Documents'.
- My Bookmarks:** An empty section.
- Pictures of the Week:** An empty section.

 A callout box on the right points to the 'Approve Documents' link in the Colleague Web Access menu, with the text 'Select Approve Documents'.

Requisitions and Payment Requests requiring approval by the user will be displayed on the screen as shown below and the requisition may be approved by clicking on the box in the Approve Column and then clicking Submit.

Approve Documents ×

| Approve | Next Approval | Doc Type | Document Number | Name | Date | Total Amount | Over Budget Amount |
|--------------------------|----------------------|----------|-----------------|------------------------|----------|--------------|--------------------|
| <input type="checkbox"/> | <input type="text"/> | REQ | 0000949 | Officemax Contract Inc | 03/16/11 | 2,500.00 | |

Before approving a document, users may view the detail by simply clicking on the highlighted document number. Information will be displayed as shown below. To return to the approval screen, click on Close Window at the bottom of the screen or the Requisition/Payment Request tab at the top of the screen.

Approve Documents Requisition x

Requisition Number 0000949
 Requisition Total \$2,500.00
 Vendor ID and/or Name 0005318 Officemax Contract Inc

Requisition Status Not Approved AP Type PO PURCHASE ORDER
 Requisition Date 03/16/11 Status Date 03/16/11 Maintenance Date 03/16/11 Desired Date
 Requestor Name Mrs. April D. Wells Initiator Name Mrs. April D. Wells
 Ship to MC St. Lawrence University Commodity Code

Purchase Orders Created

| Item Description | Vendor Item | Quantity | Unit of Issue | Price | Extended Price | GL Distribution | Tax Codes | Desired Date | Fixed Asset |
|------------------|-------------|----------|---------------|------------|----------------|---|-----------|--------------|-------------|
| Test | Test | 1.000 | EA Each | 2,500.0000 | 2,500.00 | 1-05-06-22000-52520 Business Office : Office Supplies | | | |

Printed Comments

Once a Requisition or Payment Request has been approved, a confirmation as shown below will be displayed.

Approval Confirmation x

BACK ?

The following documents were updated or created

| Doc Type | Document Number | Messages |
|----------|-----------------|----------|
| REQ | 0000949 | |

The following documents were not updated

| Doc Type | Document Number | Reason |
|----------|-----------------|--------|
|----------|-----------------|--------|

OK