

Purchase Order Receiving UIWeb 4.2 or 4.3

Once ordered goods and services are delivered, they need to be identified as received in our Colleague database system.

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.

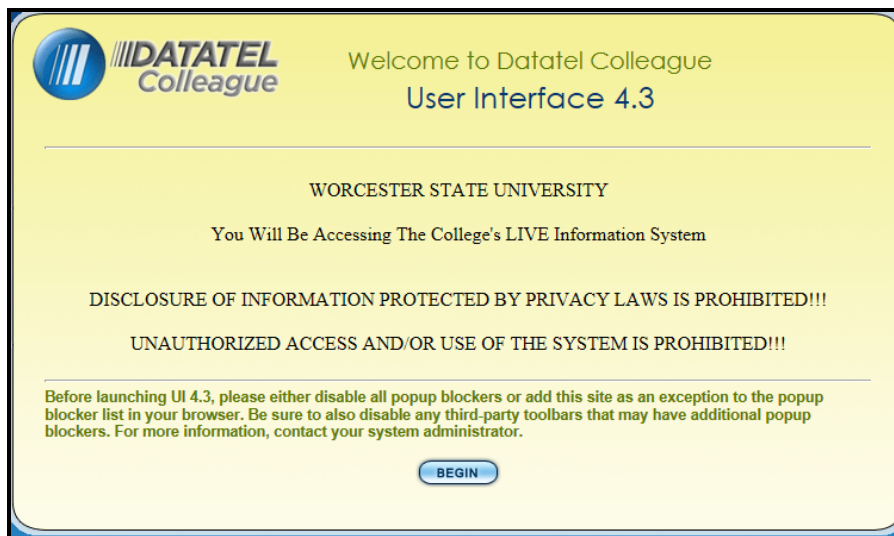
Refer to [“UIWeb 4.3 Newest Feature Changes”](#) to explore some beneficial additions.

Logging Into Datatel’s Colleague 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 as 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.

Purchase Order Receiving UIWeb

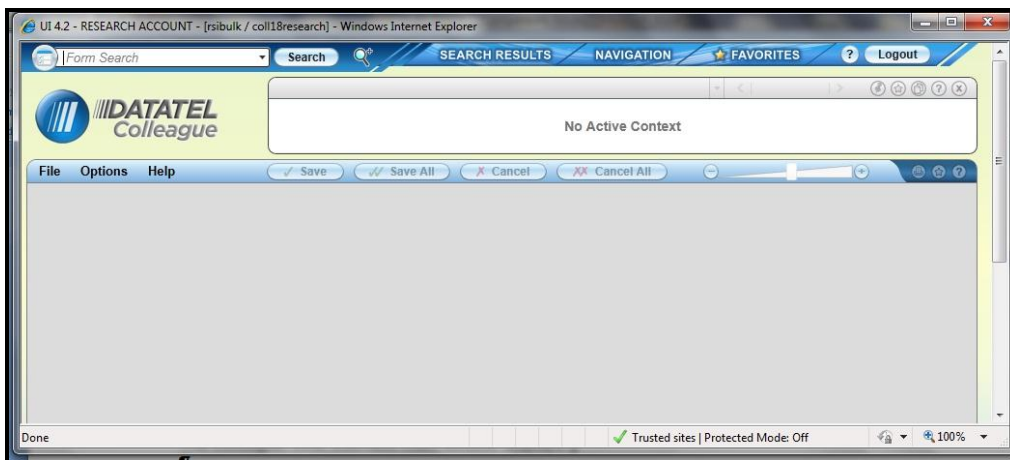
Logging into Datatel's Colleague UIWeb

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.



Purchase Order Receiving UIWeb

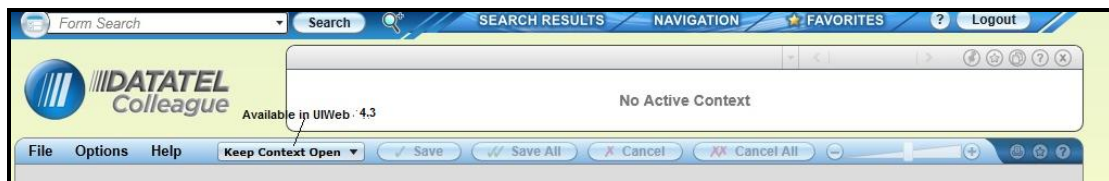
Using Requisition Inquiry (RINQ) to Locate a Purchase Order Number

- The easiest way to call up a Colleague UIWeb form is to type the letters representing the form directly into the Form Search box.
- In order for goods to be “Received”, it is necessary to know the Purchase Order number used to order the goods or services.

If the number of a purchase requisition is known, but the Purchase Order number that was created from the requisition is not, the P.O. number can be located in the upper right-hand corner of the RINQ - Requisition Inquiry form.

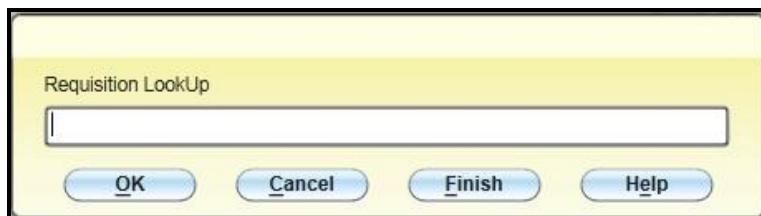
It always is a good idea to keep a record of the requisition number assigned to each requisition (online PO – REQM form) you create until the requisition has been assigned a Purchase Order number by Purchasing/Accounts Payable/Procurement representatives.

1. In the **Search** area, click the round **Person/Form** button until a **Form** displays on the front of the button.



2. Type **RINQ** in the **Search** box and click the **Search** button.

The Requisition Lookup dialog box displays.



3. Type the **Purchase Requisition number** (Online Purchase Requisition REQM) that was completed for the goods and services you need to mark as received and click **OK**.

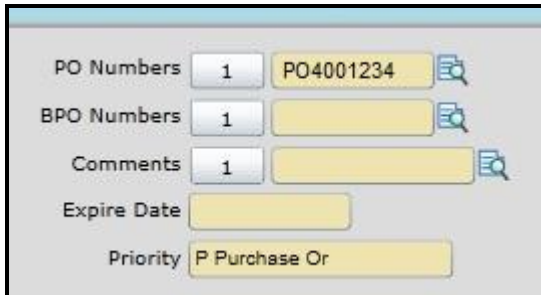
The Requisition Inquiry form displays.

Purchase Order Receiving UIWeb

Using Requisition Inquiry (RINQ) to Locate a Purchase Order Number

4. Locate the desired **Purchase Order or Blanket Purchase Order number** in the **upper right-hand corner** of the RINQ Requisition Inquiry form.

The PO number displayed below is for demonstration purposes only.



The screenshot shows a search form with the following fields and values:

PO Numbers	1	PO4001234	
BPO Numbers	1		
Comments	1		
Expire Date			
Priority	P Purchase Or		

5. Click the **Cancel** button to exit the form or Cancel All if you don't need to look up additional requisitions and wish to return to the User Interface main screen.

The Cancel Alert displays.



The dialog box contains the text "Cancel record or Return to editing" and two buttons: "Cancel" and "Return".

6. Click **Cancel**.

The Requisition Lookup prompt displays.



The dialog box is titled "Requisition LookUp" and features a text input field. Below the field are four buttons: "OK", "Cancel", "Finish", and "Help".

7. Enter another requisition number or click **Finish** to return to the main User Interface screen.

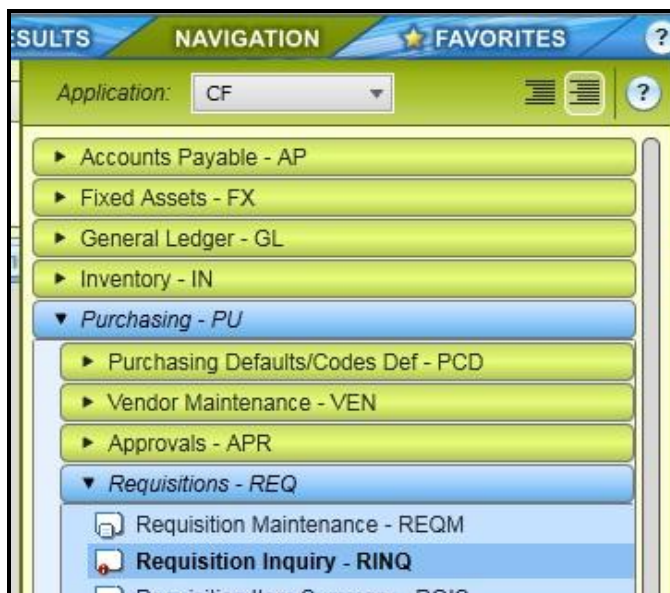
Purchase Order Receiving UIWeb

Using Requisition Inquiry (RINQ) to Locate a Purchase Order Number

- If the mnemonics (letters representing a particular form) are not known, a user can browse for a familiar form name by expanding application areas using the Navigation tab.
1. In the main UIWeb window, click the **Navigation** tab to bring it in front of the other tabs.
 2. If **CF** (Core Financial) or other desired application area is not selected, choose it from the **Application** drop-down menu.



3. Click the **black** triangle to the left of the desired application area (e.g. PU) to expand and view the contents of the selected area.



4. Double-click the icon for a form that is desired.

Purchase Order Receiving UIWeb

Obtaining a List of Purchase Requisitions

- If you do not remember the number for a purchase requisition, a list of requisitions can be obtained by typing ;IN followed by a space, the first three letters of the PO requisition initiator's last name, a comma, the first three letters of the initiator's first name in the Requisition Inquiry (RINQ) Lookup box, and clicking the OK button.

This technique also can be used in Purchase Order Inquiry (PINQ) Lookup box.

For Example:

;IN LAN, JOS ;IN followed by a space
The first three letters of the requisition initiator's last name
A comma
The first three letters of the requisition initiator's first name
Click the OK Button



If more than one requisition has been created by the specified initiator, a lookup screen listing all of the requisitions for the current fiscal year displays.



Scroll to locate the requisition number you want or type the sequence number found to the left of the requisition number in the Select # box and click the Open button.

The selected requisition will open.

Purchase Order Receiving UIWeb

Marking Received items as accepted using the Purchase Order Receiving (PORC) form.

The form can be reopened to accept items delivered at a later date.

Access the Purchase Order Receiving form and mark received goods as Accepted.

1. In the **Search** area, click the round **Person/Form** button until a **Form** displays on the front of the button.



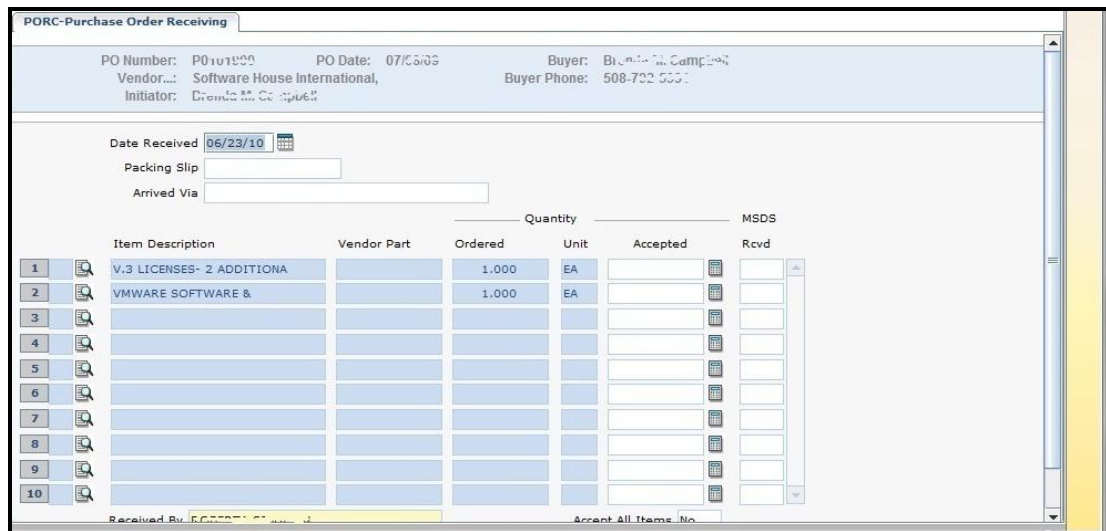
2. Type **PORC-** in the **Search box** and click the **Search** button.

The Purchase Order Lookup box displays.



3. Enter the **Purchase Order number** for the goods and services you want to receive and click **OK**.

The Purchase Order Receiving Screen displays.



All items that were ordered are listed.

Purchase Order Receiving UIWeb

Marking Received items as accepted using the Purchase Order Receiving (PORC) form.

4. If all items listed on the Purchase Order are being Accepted and Received, type Y in the **Accept All Items box** at the bottom of the form to indicate that all of the purchase order items are being received.
5. If only some of the items are being accepted or received, In the **Accepted** box to the right of each row, enter the **number of ordered items being accepted**. If all the ordered items for that row are being accepted and received, also put a Y in the row's **Rcvd** column.

In the graphic on the preceding page, if the "VMWARE Software is being accepted and received, but the V.3 licenses are not, type 1 in the Accepted box, and a Y in its received box.

When the remaining goods are delivered, the PORC form should be reopened and the remaining goods should be marked as Accepted and/or "received".

6. Once ordered items have been marked as Accepted and/or Received, click the **Save** button.

The following Alert displays.



7. Click the **Update** button.

Performing Purchase Order Inquiries

- When remaining purchase order item statuses or balances need to be checked, the Blanket Inquiry (BINQ) or Purchase Order Inquiry (PINQ) forms can be used.

Users can determine whether or not a voucher has been created or an item's status has changed from Outstanding to Paid.

Representatives in the Procurement Department can answer questions regarding item statuses.

Statuses Pertaining to POs:

Code	Description	Min Entry	Special Processing
U	In Process (unfinished)	U	
N	Not Approved	N	
O	Outstanding	O	
A	Accepted	A	
B	Backordered	B	
I	Invoiced	I	
P	Paid	P	
R	Reconciled	R	
V	Voided	V	
C	Closed	C	

Purchase Order Receiving UIWeb

Performing Purchase Order Inquiries

Statuses Pertaining to BOs

Code	Description	Min Entry	Special Processing
U	In Process (unfinished)	U	
N	Not Approved	N	
O	Outstanding	O	
V	Voided	V	
C	Closed	C	

When viewing the BINQ-Blanket PO Inquiry form:

- Encumbered Refers to the amount of funds allocated to the Blanket PO
- Expensed Refers to the amount of money that will be deducted from the Blanket PO
- Difference Refers to available money remaining on the Blanket Purchase Order