WaveWorks!

Procurement

User Guide

Table of Contents

Procurement Basics

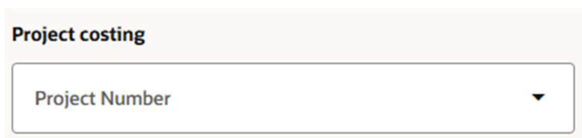
The Procurement Life Cycle

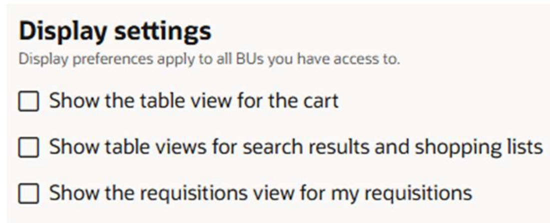
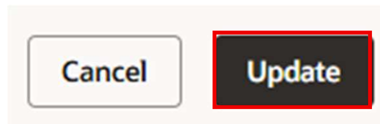
Tulane users should follow the following process when using the procurement module to purchase goods or services. See the

1. Receive a quote(s) from a non-catalog vendor(s). Punch out vendors do not require quotes.
2. Complete the appropriate non-catalog request form or punch out to the vendor site and add required items to a cart.
3. Add the request form to the WaveWorks cart or return from the punch out vendor site.
4. Complete the check out process including updating the accounting and delivery information at the requisition and adding the RASU to any requisition involving a Sponsored Project or splitting charging instructions at the line item.
5. Submit the Requisition.
6. After all Tulane approvals are complete, the requisition becomes a PO.
7. The good or service is delivered.
8. The invoice for the good or service can be emailed to accountspayable@tulane.edu
9. A receipt is completed for invoices over $5,000.
10. Invoice notifications should be approved if applicable.

How to set up preferences

Upon initial access to the Procurement module, an employee will be prompted to set their preferences. Those preferences may be updated at any time.

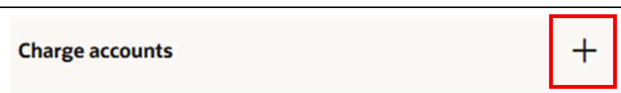
Once in WaveWorks, navigate to the Procurement tab.	
Click on Purchase Requisitions (RSSP) tile.	
Click on the Preferences box.	 This is on the right-hand side of the screen.
Update your Delivery Address using the drop-down menu.	 This delivery address is based on your HCM record Only internal Tulane addresses may be chosen
Add an expense favorite using the Project costing box.	 This is for Non-Sponsored and Sponsored Projects See How to create a Non-Sponsored or Sponsored Project Expense Favorite for specific instructions
Add an expense favorite using the Charge accounts.	 This is for GL Projects. See How to create a GL Project Expense Favorite for specific instructions

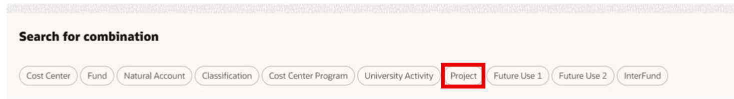
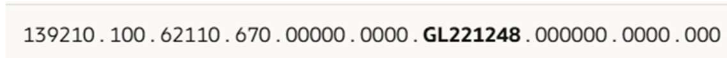
Choose Display Settings.	 This will show your information as lists or cards
Click Update.	

How to create a Non-Sponsored or Sponsored Project Expense Favorite

Add an expense favorite using the Project costing box.	 This is for Non-Sponsored and Sponsored Projects.
The Task number should default.	
Choose the Expenditure Type.	 This is the natural account
Choose the Expenditure Organization.	

How to create a GL Project Expense Favorite

Add an expense favorite using the Charge accounts.	 This is for GL Projects.
Set the Account Nickname.	

Click the arrow to choose the project	
Choose the Project.	
Choose the correct chart string.	
Click Apply.	

What is a Hosted Catalog?

A hosted catalog is a predefined collection of supplier goods created by the procurement team. It allows users to search, view and order products directly from within WaveWorks without needing to punch out to a specific supplier.

Tulane's current hosted catalog contains items from Blick Art Supplies.

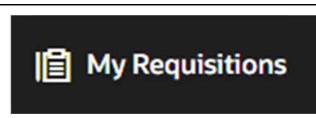
The hosted catalog can be found on the Self-Service Procurement tab under Shop by category.

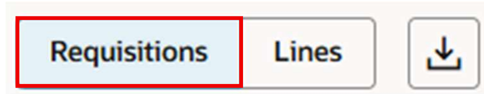
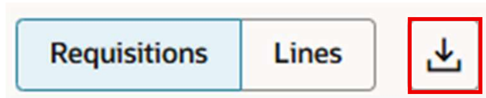
What is the My Requisitions tab?

The My Requisitions tab allows an employee to see all their requisitions.

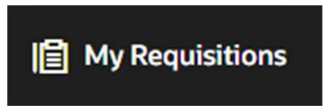
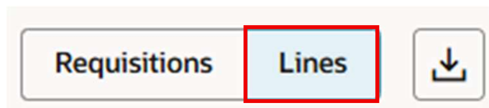
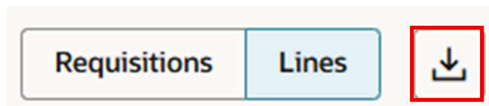
Employees may also download information related to full requisitions or individual line items of requisitions. This download gives the employee information such as requisition number, status, item description and category, amount, quantity, requester, delivery address, etc. all in one report.

How to download a Requisition Report.

Click on the My Requisitions Tab.	

Choose the Requisitions tab.	
Click the download button.	 The report will download to the chosen place on the employee’s computer

How to download a Lines Report.

Click on the My Requisitions Tab.	
Choose the Lines tab.	
Click the download button.	 The report will download to the chosen place on the employee’s computer

Understanding Reserved Funds Status

Reserved Funds is part of Tulane’s new encumbrance accounting process whereby funds are committed to a Project. When a requisition is approved and becomes a PO the funds will be committed. Once the PO is paid, the funds will be converted into actuals.

Status	Applies To	Description
Reserved	Requisition, Line	Funds successfully reserved for all lines. Transaction can proceed.
Reserved partial	Requisition, Line	Funds reserved for some, but not all lines. Review needed for incomplete items.
Reserved warning	Requisition, Line	Funds reserved but with warnings (e.g., minor issues). Proceed with caution.
Reserved no control budget	Distribution	Reservation done; no control budget assigned.
Not reserved passed	Requisition, Line	Funds check passed without reservation needed.

Not reserved partial funds	Requisition, Line	Funds check failed for some lines/distributions.
Not reserved warning	Requisition, Line	Funds check passed with warnings.
Failed	Requisition, Line	Funds check or reservation fully failed due to insufficient funds.
Not applicable	Requisition, Line	Funds validation not required.
Liquidated	General	Funds commitment fully consumed or charged (e.g., after invoicing).

Suppliers

In WaveWorks, suppliers will not be able to be added by our users. This will ensure that new supplier additions are need-justified, non-duplicative, compliance-screened, and properly handed off for system record creation.

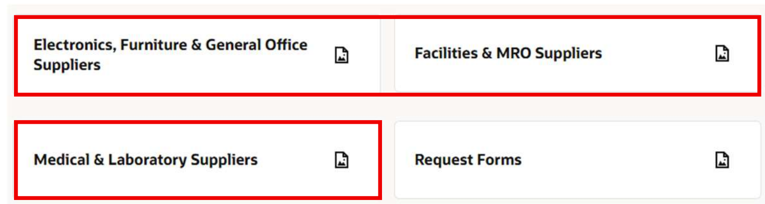
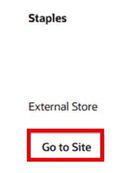
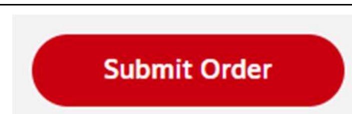
How to request a new supplier

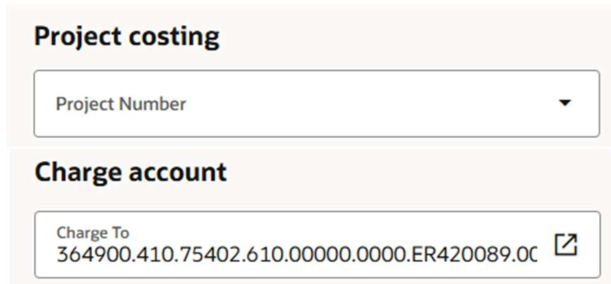
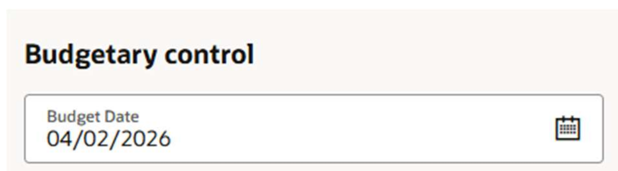
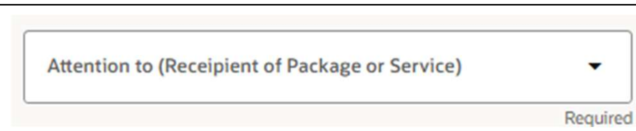
1. The Tulane Requester will complete the online Supplier Onboarding Intake Form.
   TIP The link may be found on Tulane's procurement site and on the WaveWorks Training site.
2. The completed form will be sent to the Supplier Support team.
3. Supplier support will determine if the supplier will be onboarded.
4. If not approved, the Tulane Requester will be given alternative supplier options to the requested one.
5. If approved, supplier support will provide an onboarding link directly to the supplier. The supplier may contact suppliersupport@tulane.edu for assistance with any issues.
6. The supplier will provide Tulane with all necessary information.
7. Accounts Payable will verify that Tulane has received all necessary information and complete the Supplier set up.

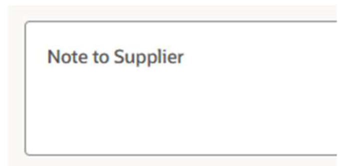
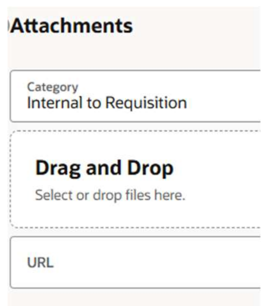
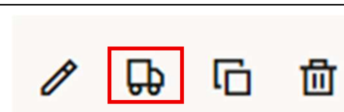
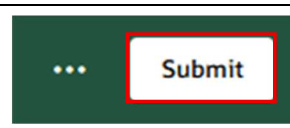
Requisitions

How to create a Catalog Requisition

Once signed into WaveWorks, click on the Procurement Tab.	Procurement

Click on the Purchase Requisitions (RSSP) shopping cart.	
Choose the appropriate category of the punch out.	 Request forms are non-catalog requests
Click on Go to Site button for the desired punch out.	
Placed desired items into the cart on the punch out site.	
Submit the order.	
Click on the pencil next to the Requisition Summary	
Enter a Description if applicable.	
Enter justification information for approvers (if applicable).	 Examples are cost breakdown, sole source if not attached separately, why the requisition is needed, etc.

Update the Deliver-to-Location if needed.	 This field needs to match the delivery address in the Additional Information
Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.	 **Only use the Charge Account if the account starts with GL** If using a Sponsored Project make sure to add the RASU details on the line item See the How to Check Out section of the guide for more information
Budgetary control should be today's date.	 This is the date that will appear on the budget statement
Add the recipient.	 This is to whom the package will be addressed and should be a Tulane employee **TIP** Search is last name, first name
Add the recipient's delivery building.	 This needs to match the building in the Delivery section

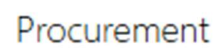
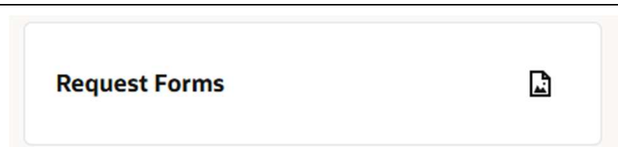
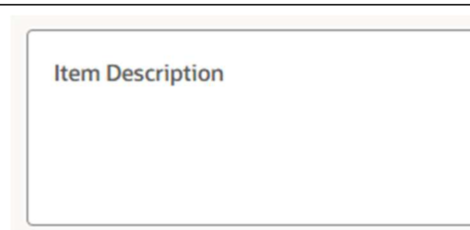
Add the recipient's room number.	 **TIP** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here **TIP** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here
Add a note to Supplier if applicable.	
Add Attachments if applicable.	 If this is a Candex requisition, please add all attachments here as one pdf
Click Update.	
Update any line items.	 This is where spilt allocations and adding the RASU details occur (add the RASU details everytime a Sponsored Project is used), complete those steps if applicable
Click Submit.	 The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

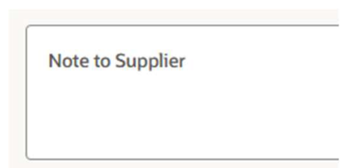
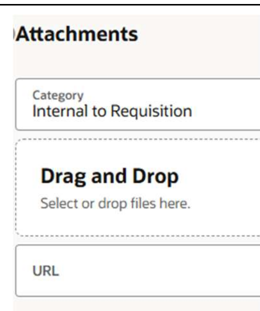
How to create a Non-Catalog Requisition for a Good

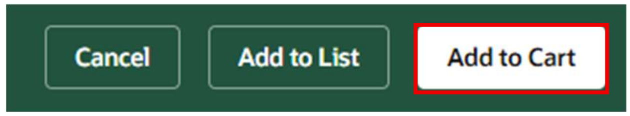
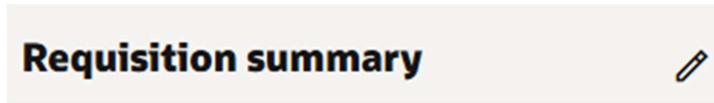
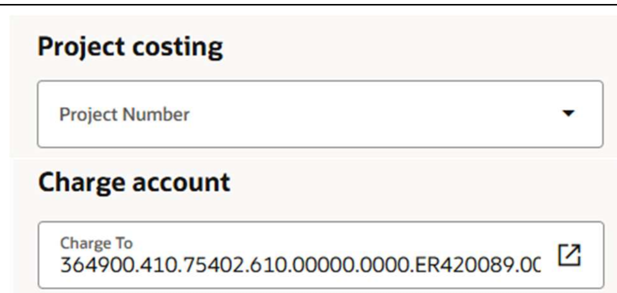
Non-catalog requests allow good purchases not available from a catalog. Please verify that the item is not available in a catalog before requesting.

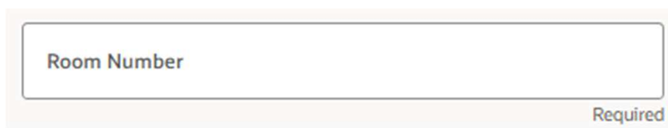
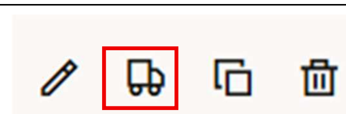
These are the required steps for a non-catalog requisition. Other fields are optional.

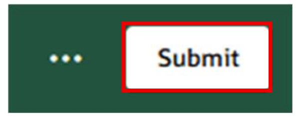
Each line of a Quote should be entered separately to ensure PO matching and payment.

Once signed into WaveWorks, click on the Procurement Tab.	
Click on the Purchase Requisitions (RSSP) shopping cart.	
Click on Request Forms under the Shop by category.	
Choose the appropriate form for goods. Click Create Request.	
Enter a Description.	 This description will appear on the final PO
Choose your category.	
Enter a Quantity.	

Enter a Unit of Measure.	
Enter a Price.	
Choose the Supplier.	 To search all Suppliers enter %%% for the full list If the supplier is not available, follow the new supplier request process
Choose the Supplier Site.	 Please choose the proper address if multiple options
Add the item into the Supplier Item Field.	
Add a note to Supplier.	 These notes will be seen by the supplier and should include the Quote Number
Add Attachments.	 Add quotes and sole source justifications here A URL is not an acceptable format for a quote as prices may change

Add to Cart.	 Repeat these steps for multiple line items
Click on the pencil next to the Requisition Summary	
Enter justification information for approvers (if applicable).	 Examples are cost breakdown, sole source if not attached separately, why the requisition is needed, etc.
Update the Deliver-to-Location if needed.	 This field needs to match the delivery address in the Additional Information
Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.	 **Only use the Charge Account if the account starts with GL** If using a Sponsored Project make sure to add the RASU details on the line item See the How to Check Out section of the guide for more information

Budgetary control should be today’s date.	 This is the date that will appear on the budget statement
Add the recipient.	 This is to whom the package will be addressed and should be a Tulane employee **TIP** Search is last name, first name
Add the recipient’s delivery building.	 This needs to match the building in the Delivery section
Add the recipient’s room number.	 **TIP** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here **TIP** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here
Click Update.	
Update any line items.	 This is where spilt allocations and adding the RASU details occur (add the RASU details everytime a Sponsored Project is used), complete those steps if applicable

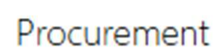
Click Submit.	 The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

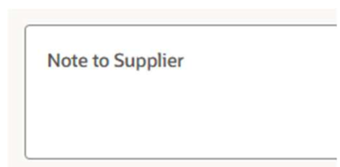
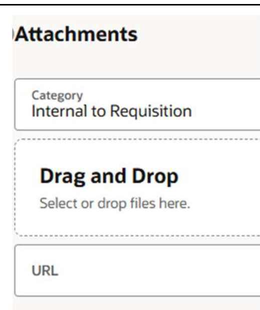
How to create a Non-Catalog Requisition for a Service

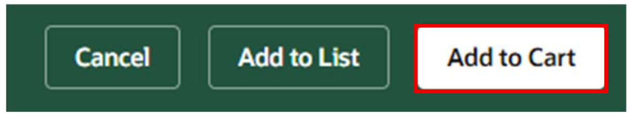
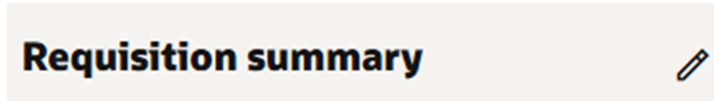
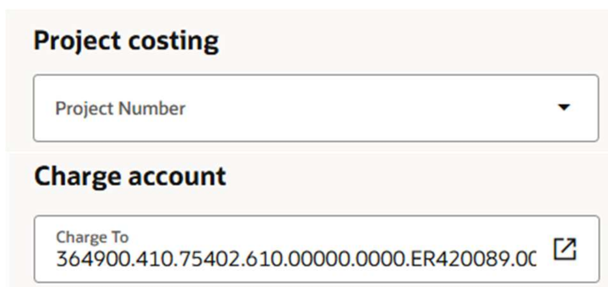
Non-catalog requests allow service purchases not available from a catalog.

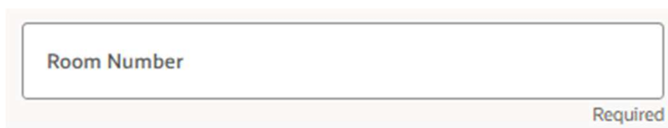
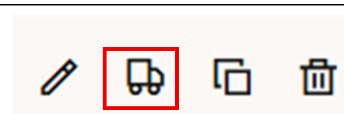
These are the required steps for a non-catalog requisition. Other fields are optional.

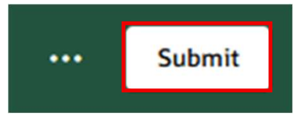
Each line of a Quote should be entered separately to ensure PO matching and payment.

Once signed into WaveWorks, click on the Procurement Tab.	
Click on the Purchase Requisitions (RSSP) shopping cart.	
Click on Request Forms under the Shop by category.	
Choose the appropriate form for services. Click Create Request.	
Enter a Description.	 This description will appear on the final PO

Choose your category.	
Enter an Amount.	
Update the Currency if applicable.	
Choose the Supplier.	 To search all Suppliers enter %%% for the full list If the supplier is not available, follow the new supplier request process
Choose the Supplier Site.	 Please choose the proper address if multiple options
Add the item into the Supplier Item Field.	
Add a note to Supplier if applicable.	 These notes will be seen by the supplier and should include the Quote Number
Add Attachments.	 Add quotes and sole source justifications here A URL is not an acceptable format for a quote as prices may change

Add to Cart.	 Repeat these steps for multiple line items
Click on the pencil next to the Requisition Summary	
Enter justification information for approvers (if applicable).	 Examples are cost breakdown, sole source if not attached separately, why the requisition is needed, etc.
Update the Deliver-to-Location if needed.	 This field needs to match the delivery address in the Additional Information
Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.	 **Only use the Charge Account if the account starts with GL** If using a Sponsored Project make sure to add the RASU details on the line item See the How to Check Out section of the guide for more information

Budgetary control should be today's date.	 This is the date that will appear on the budget statement
Add the recipient.	 This is to whom the package will be addressed and should be a Tulane employee **TIP** Search is last name, first name
Add the recipient's delivery building.	 This needs to match the building in the Delivery section
Add the recipient's room number.	 **TIP** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here **TIP** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here
Click Update.	
Update any line items.	 This is where spilt allocations and adding the RASU details occur (add the RASU details everytime a Sponsored Project is used), complete those steps if applicable

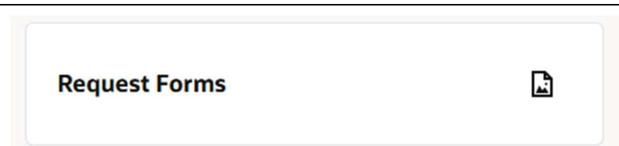
Click Submit.	 The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

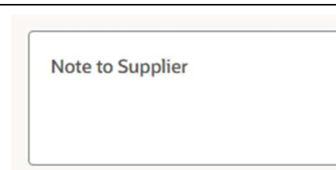
How to create an Annual PO for a Good

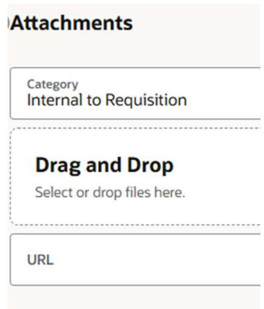
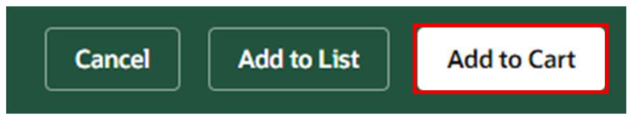
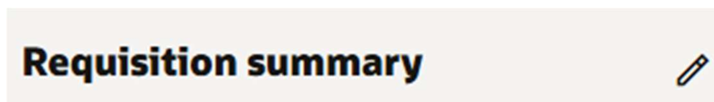
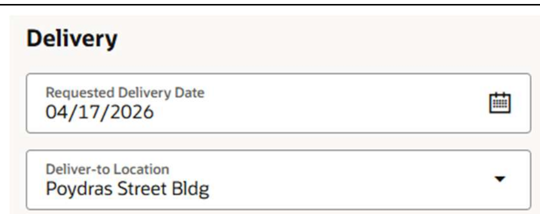
An Annual PO should be set up for repeated purchases of the same type of item from the same vendor to cover multiple purchases.

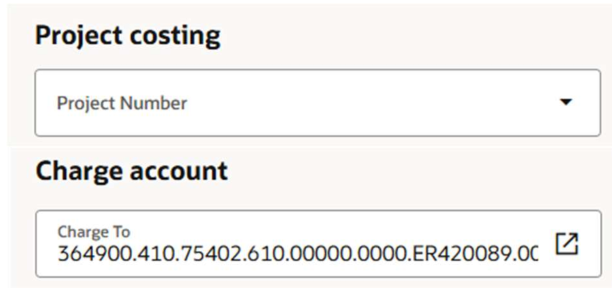
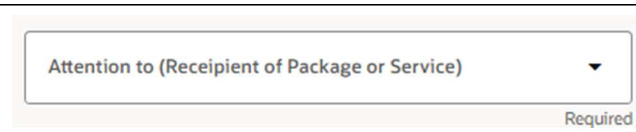
These are the required steps for a non-catalog requisition. Other fields are optional.

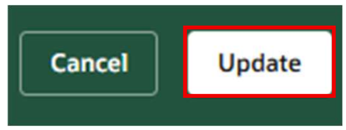
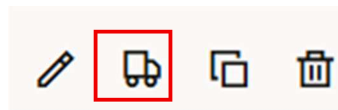
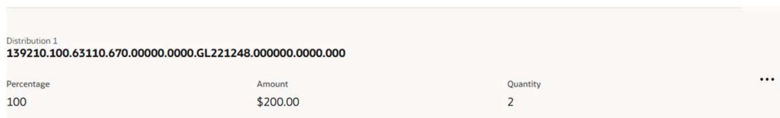
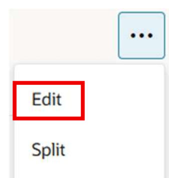
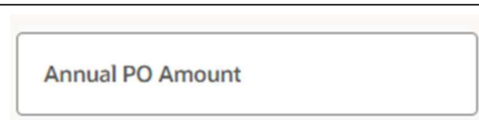
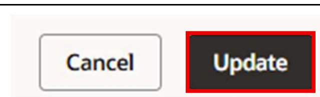
Each line of a Quote should be entered separately to ensure PO matching and payment.

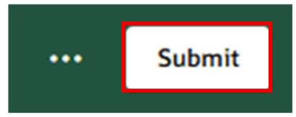
Once signed into WaveWorks, click on the Procurement Tab.	
Click on the Purchase Requisitions (RSSP) shopping cart.	
Click on Request Forms under the Shop by category.	
Choose the appropriate Annual PO form. Click Create Request.	

Enter a Description.	 Please start the description box with the words Annual PO This description will appear on the final PO
Choose your category.	
Enter a Quantity.	
Enter a Unit of Measure.	
Enter a Price.	
Choose the Supplier.	 To search all Suppliers enter %%% for the full list If the supplier is not available, follow the new supplier request process
Choose the Supplier Site.	 Please choose the proper address if multiple options
Add the item into the Supplier Item Field.	
Add a note to Supplier.	 These notes will be seen by the supplier and should include the Quote Number

Add Attachments.	 Add quotes and sole source justifications here A URL is not an acceptable format for a quote as prices may change
Add to Cart.	 Repeat these steps for multiple line items
Click on the pencil next to the Requisition Summary	
Enter justification information for approvers (if applicable).	 Examples are cost breakdown, sole source if not attached separately, why the requisition is needed, etc.
Update the Deliver-to-Location if needed.	 This field needs to match the delivery address in the Additional Information

Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.	 **Only use the Charge Account if the account starts with GL** If using a Sponsored Project, make sure to add the RASU details on the line item See the How to Check Out section of the guide for more information
Budgetary control should be today's date.	 This is the date that will appear on the budget statement
Add the recipient.	 This is to whom the package will be addressed and should be a Tulane employee **TIP** Search is last name, first name
Add the recipient's delivery building.	 This needs to match the building in the Delivery section

Add the recipient's room number.	 **TIP** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here **TIP** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here
Click Update.	
Update the line item by clicking on the delivery truck on the line.	
Scroll to the Distribution Line.	
Click on the three dots. Choose Edit.	
Enter the Annual PO Amount.	
Enter the Start Date.	
Enter the End Date.	 This should not extend past the current fiscal year
Enter the RASU Details if using a Sponsored Project.	 This is the Cost Center of the Project
Click Update.	

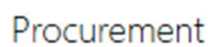
Click Update.	
Click Submit.	 The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

How to create an Annual PO for a Service

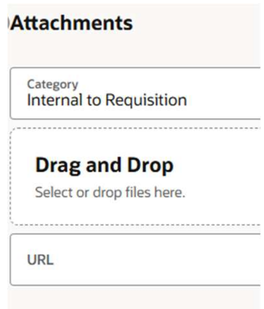
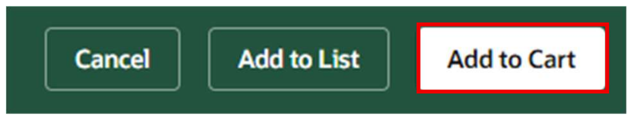
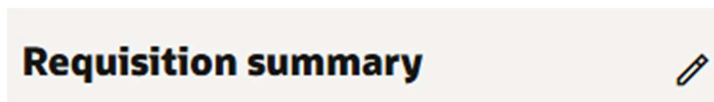
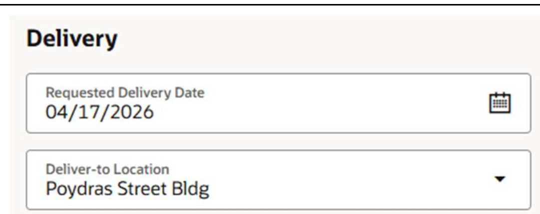
An Annual PO should be set up for repeated services paid throughout the fiscal year.

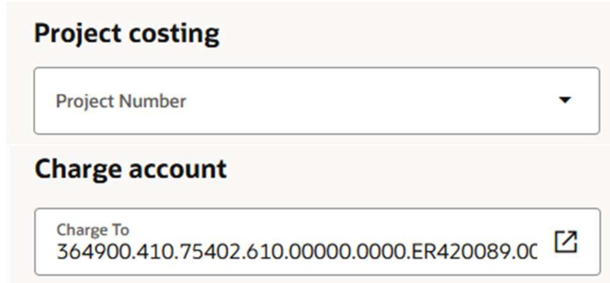
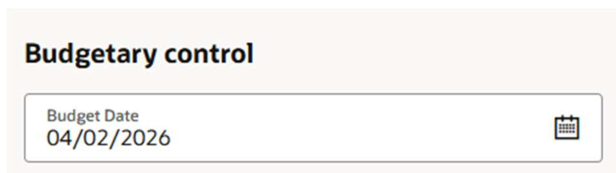
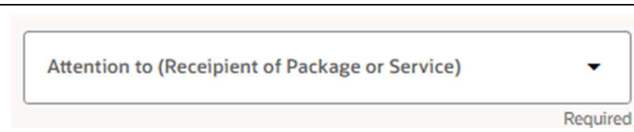
These are the required steps for a non-catalog requisition. Other fields are optional.

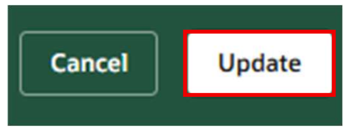
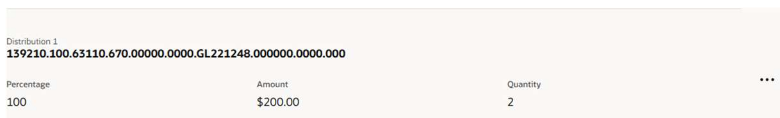
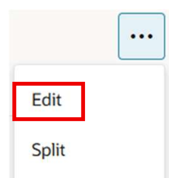
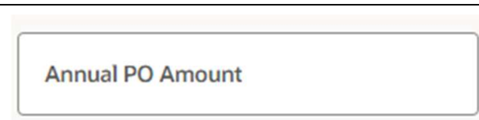
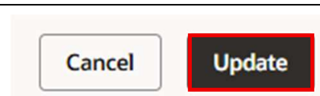
Each line of a Quote should be entered separately to ensure PO matching and payment.

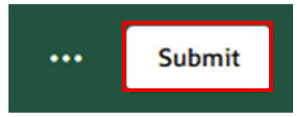
Once signed into WaveWorks, click on the Procurement Tab.	
Click on the Purchase Requisitions (RSSP) shopping cart.	
Click on Request Forms under the Shop by category.	
Choose the appropriate Annual PO form. Click Create Request.	

Enter a Description.	 Please start the description box with the words Annual PO This description will appear on the final PO
Choose your category.	
Enter an Amount.	
Choose the Supplier.	 To search all Suppliers enter %%% for the full list If the supplier is not available, follow the new supplier request process
Choose the Supplier Site.	 Please choose the proper address if multiple options
Add the item into the Supplier Item Field.	
Add a note to Supplier if applicable.	 These notes will be seen by the supplier and should include the Quote Number

Add Attachments.	 Add quotes and sole source justifications here A URL is not an acceptable format for a quote as prices may change
Add to Cart.	 Repeat these steps for multiple line items
Click on the pencil next to the Requisition Summary	
Enter justification information for approvers (if applicable).	 Examples are cost breakdown, sole source if not attached separately, why the requisition is needed, etc.
Update the Deliver-to-Location if needed.	 This field needs to match the delivery address in the Additional Information

Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.	 **Only use the Charge Account if the account starts with GL** If using a Sponsored Project make sure to add the RASU details on the line item See the How to Check Out section of the guide for more information
Budgetary control should be today's date.	 This is the date that will appear on the budget statement
Add the recipient.	 This is to whom the package will be addressed and should be a Tulane employee **TIP** Search is last name, first name
Add the recipient's delivery building.	 This needs to match the building in the Delivery section

Add the recipient's room number.	 **TIP** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here **TIP** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here
Click Update.	
Update the line item by clicking on the delivery truck on the line.	
Scroll to the Distribution Line.	
Click on the three dots. Choose Edit.	
Enter the Annual PO Amount.	
Enter the Start Date.	
Enter the End Date.	 This should not extend past the current fiscal year
Enter the RASU Details if using a Sponsored Project.	 This is the Cost Center of the Project
Click Update.	

Click Update.	
Click Submit.	 The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

How to create an Annual PO for a Subaward

Subawards on grants will be set up as Annual POs in procurement by the Award Owner or the Award Owner’s department.

Invoices will be processed against the PO for payment instead of individual requisitions.

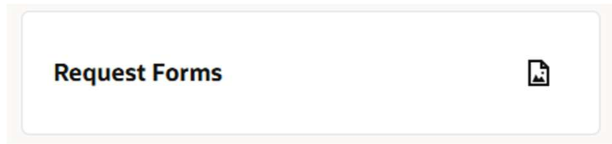
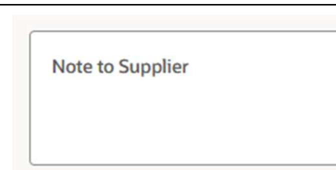
Any time there is a new Project created a new subaward PO will be created.

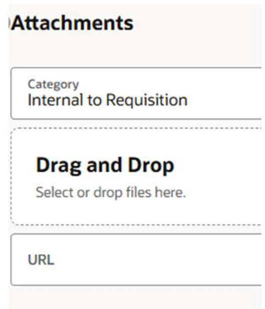
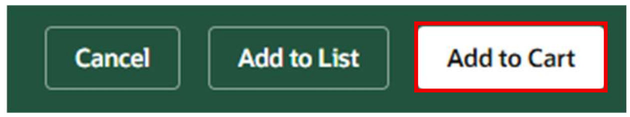
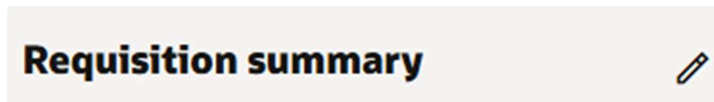
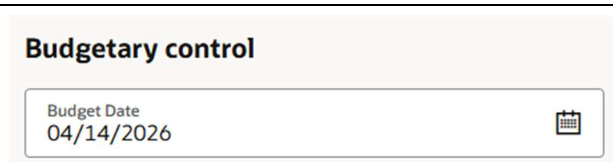
POs may be modified for a project extension or additional funding by creating a change order.

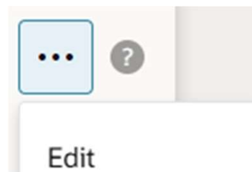
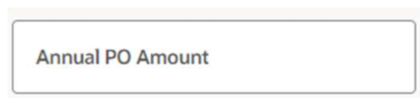
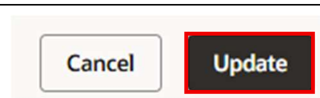
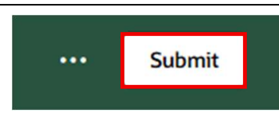
The process for this is as follows:

1. The subcontract is approved.
2. The subcontractor is invited to register as a WaveWorks vendor.
3. The Award Owner or their designee creates the Annual PO for the full subcontract amount.
4. Invoices are mailed to accountspayable@tulane.edu for payment and must contain the PO #.
5. An Invoice Notification for approval is sent to the PI and RASU to approve the invoice.
6. Payment is made to the subcontractor.

Once signed into WaveWorks, click on the Procurement Tab.	
Click on the Purchase Requisitions (RSSP) shopping cart.	

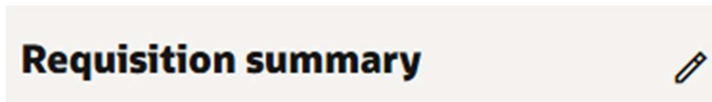
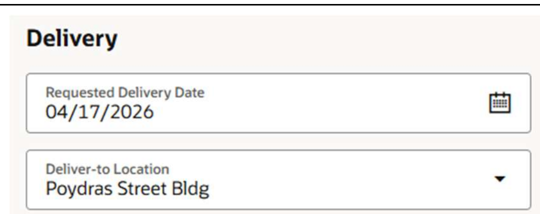
Click on Request Forms under the Shop by category.	
Choose the Annual PO for services form. Click Create Request.	
Enter the words Subcontract Annual PO first and then Subcontract-Project # here.	 This description will appear on the final PO
Choose Subcontract/Subaward as the Category.	
Enter the total Amount of the Subaward.	 If this is an existing subaward before 4/13/26, use the remaining balance as the amount
Choose the Supplier.	 Vendors should be set up as part of the award process
Choose the Supplier Site.	 Please choose the proper address if multiple options
Please indicate that the PO is not for order fulfillment.	

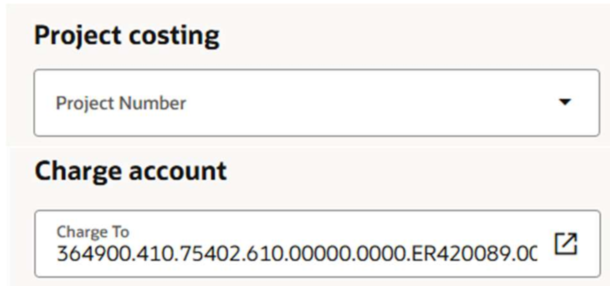
Add a copy of the Subcontract as an Attachment.	
Add to Cart.	
Click on the pencil next to the Requisition Summary.	
Enter the Sponsored Project in the Project costing field.	
Enter 67510 G/C Subcontractor1 as the expenditure type.	
Enter the Expenditure Organization.	 This is the Cost Center where the Sponsored Project lives
Do **NOT** change this date.	
Do **NOT** change this date.	
Add your name as the Attention to.	
Enter the building in your HR record.	 This should match the building in the Delivery field above

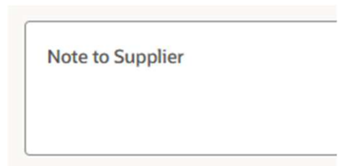
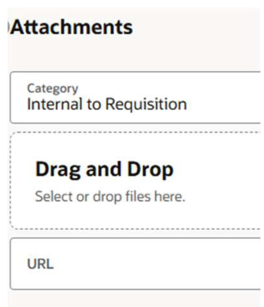
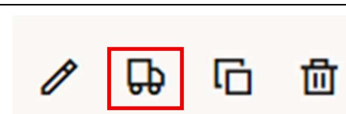
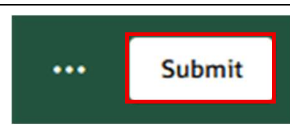
Enter your room number.	
Update.	
Click on the Delivery Truck on the line item. Scroll down.	
Click on the 3 dots under Billing. Click Edit.	
Add the total amount of the Subaward.	 If this is existing subaward before 4/13/26, use the remaining balance as the amount.
Enter the Start Date of the Subaward.	
Enter the End Date of the Subaward.	
Enter the RASU Details.	 This is the Cost Center of the Project
Click Update.	
Click Update.	
Click Submit.	

	Once the Requisition is approved and becomes a PO, it can be invoiced against Invoices should be emailed to accountspayable@tulane.edu The invoice **MUST** contain the PO#

How to Check Out

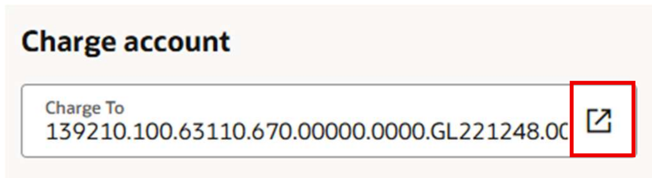
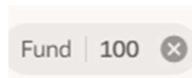
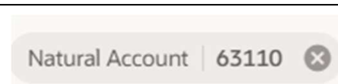
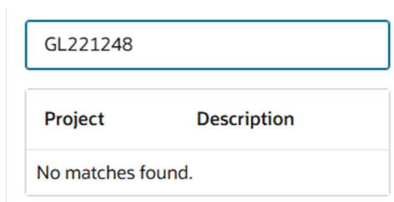
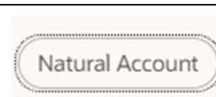
Click on the pencil next to the Requisition Summary.	
Enter a Description if applicable.	 This description will appear on the final PO
Enter justification information for approvers (if applicable).	 Examples are cost breakdown, sole source if not attached separately, why the requisition is needed, etc.
Update the Deliver-to-Location if needed.	 This field needs to match the delivery address in the Additional Information

Enter either the GL, Non-Sponsored, or Sponsored Project in the **appropriate** field.	 **Only use the Charge Account if the account starts with GL** If using a Sponsored Project make sure to add the RASU details on the line item See the How to Check Out section of the guide for more information
Budgetary control should be today's date.	 This is the date that will appear on the budget statement
Add the recipient.	 This is to whom the package will be addressed and should be a Tulane employee **TIP** Search is last name, first name
Add the recipient's delivery building.	 This needs to match the building in the Delivery section

Add the recipient's room number.	 **TIP** If delivering to JBJ, choose JBJ for the building and enter the specific building and room number here **TIP** If delivering to TNBRC, choose TNBRC for the building and enter the specific building and room number here
Add a note to Supplier if applicable.	 These notes will be seen by the supplier
Add Attachments if applicable.	 If this is a Candex requisition, please add all attachments here as one pdf
Click Update.	
Update any line items.	 This is where spilt allocations and adding the RASU details occur see those sections of the guide for more step by step instructions
Click Submit.	 The three dots will allow a requisitioner to check funds, view approvers, view a pdf of the requisition or save for later

How to Allocate to a GL Project

This process is only for Projects that begin with a GL prefix.

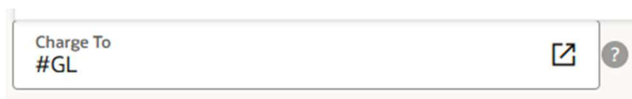
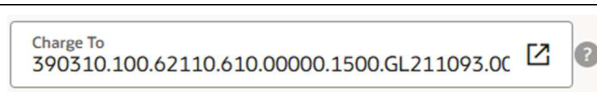
Click the pencil on the Requisition summary.	
Click on the arrow.	 Hover over the line to see the expense default- if this is the correct expenditure project skip these steps
Clear the Cost Center.	 Clear by clicking the x
Clear the Fund.	 Clear by clicking the x
Clear the Classification.	 Clear by clicking the x
Clear the Natural Account.	 Clear by clicking the x
Replace the Project.	 Click on the box to search by partial or complete number or by account name
Replace the Natural Account.	 Click on the box to search by number or description If the wrong Natural account is chosen the system will override with the correct one

Highlight the appropriate string.	 **TIP** If there is still not a string, use the GL Account Aliases Report or GL Account Search
Click Apply.	 The Apply button will not be accessible if a GL string is not highlighted

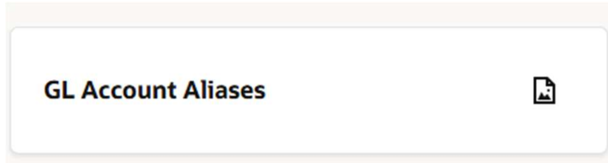
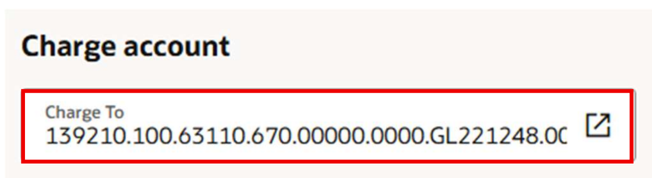
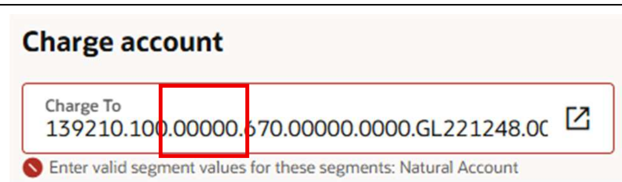
What if I can't find my GL Project?

This process is only for Projects that begin with a GL prefix.

Search Using the Account Field

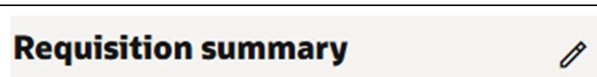
From the Requisition Summary, click into the Charge account.	
Search for the GL Project using #GL and the number.	 **TIP** Enter #GL and the number to search This will not work without the #GL
Highlight the correct GL Project line.	
Add in the Natural Account.	 **TIP** This is the 3rd segment of the chart string
Enter Delivery Details and Update.	

Search Using the GL Account Alias Report

Click on the GL Account Aliases in the Shop by Category.	 **TIP** Open a second window with WaveWorks so the requisition is not lost
Search for your GL Project.	 **TIP** The full GL number (i.e. GL123456) may be entered, or a partial search is allowed Use a % at the beginning if the prefix is unknown Use a % at the end if last digits are unknown Use a % at the beginning and end if neither the prefix nor the full number is known
Click Apply.	
Copy the CONCAT_STRG.	
Paste into the Charge account field.	
Replace the Natural Account.	 If the wrong natural account is chosen, the system will autocorrect for the proper one

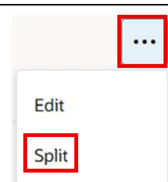
How to Allocate to a Sponsored or Non-Sponsored Project

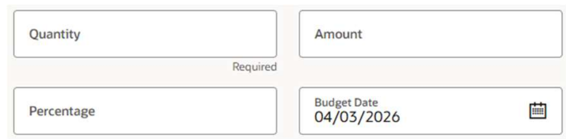
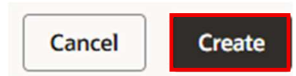
This process is only for Projects that do not begin with a GL prefix.

Click the pencil on the Requisition summary.	

Enter the Project in the box.	 Search by partial or complete number or by project description When you choose a Non-sponsored Project the task and expenditure organization will default When you choose a Sponsored Project the task, expenditure organization, contract number and funding source will default
Choose your Expenditure Type.	 Expenditure Type is the Natural Account.

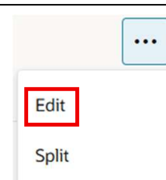
How to Split an Allocation

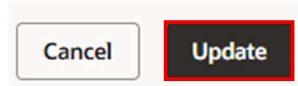
On the line item, click the delivery truck.	
Scroll to the Distribution Line.	
Click on the three dots. Choose Spilt.	

Update the Project costing box or Charge account line.	 **Only use the Charge Account if the account starts with GL** If using a Sponsored Project make sure to add the RASU details on the line item See the How to Check Out section of the guide for more information
Enter either the quantity, amount or percentage to spilt by.	 Only one field is required
Click Create.	

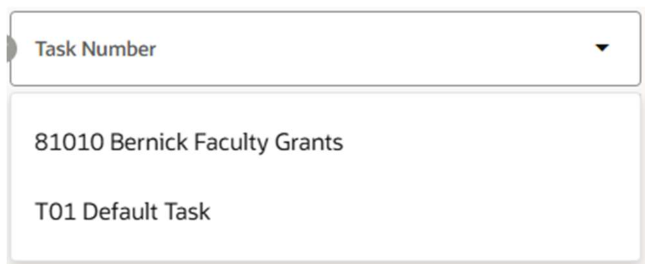
How to add the RASU Details

The RASU details will need to be added to Sponsored Projects for select expenditure types- see that list in the appendix.

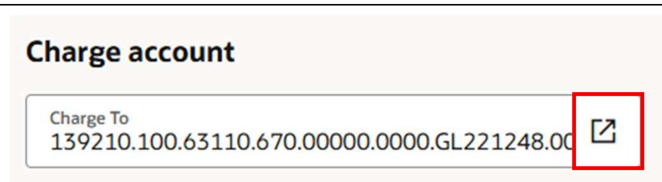
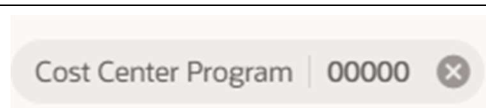
On the line item, click the delivery truck.	
Scroll to the Distribution Line.	
Click on the three dots. Choose Edit.	
Add the Project's Cost Center in the RASU Details box.	 If the RASU is not added, a workflow will not generate for this requisition

Click Update.	

How to add a Cost Center Program with a Non-Sponsored or Sponsored Project

Enter the Project in the box.	
Choose the appropriate Cost Center Program in the Task Field.	 **TIP** If a Cost Center Program was not previously used on a project, it will not be an option **TIP** To request access to a Cost Center Program, complete the Service Now request

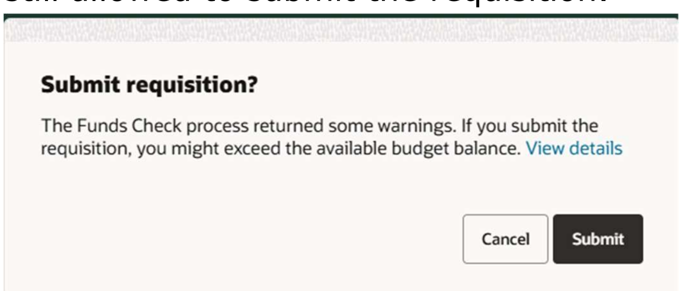
How to add a Cost Center Program with a GL Project

Click the pencil on the Requisition summary.	
Click on the arrow.	
Click on Cost Center Program.	

Enter in the box.	 **TIP** If a chart string does not populate, try deleting the cost center, fund, classification and natural account **TIP** If the correct natural account does not appear choose anyone and the system will override to the correct one when the Requisition summary is updated

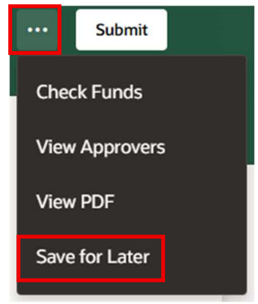
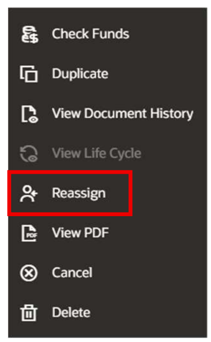
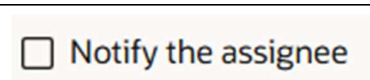
What is the budget warning?

WaveWorks will perform a funds check upon requisition submittal. If the project does not have sufficient funds, the requester will receive a warning. The check is based on non-salary funds for each project. The requester is still allowed to submit the requisition.

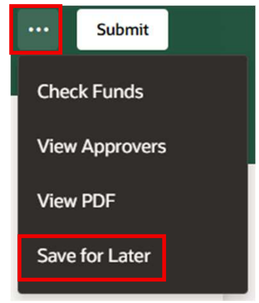


Reassigning a Requisition

Reassigning a requisition is possible in WaveWorks. Please note that a reassigned requisition becomes the assignee’s and the person who assigned it will no longer have access to the requisition. This process may also alter the workflow.

Click the three dots next to the Submit button on the requisition. Click Save for Later.	
Click Save for Later.	
Click Reassign.	
Search the employee's name.	
Click or skip the Notify the assignee box.	
Click Reassign.	

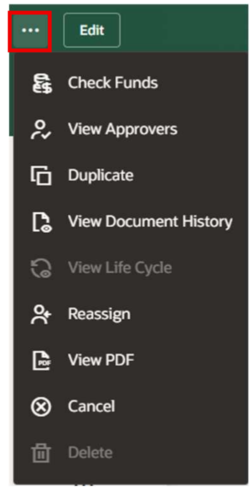
How to save without submitting

Click the three dots next to the Submit button on the requisition. Click Save for Later.	
Click Save for Later.	 This requisition becomes a Draft and can be accessed again on the RSSP homepage under My Recent Requisitions or the My Requisitions tab

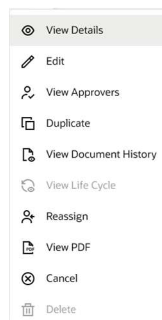
Manage Requisitions

Review from Self Service Procurement

Click on the Requisition.	

Click the three dots. Choose the action.	

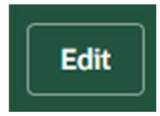
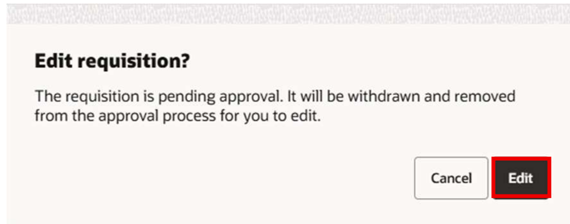
Review from My Requisitions

Click on the three dots on the PR line.	
Choose the action.	

Withdraw from Self Service Procurement

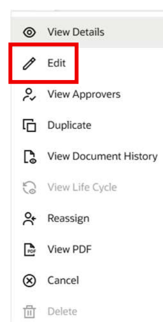
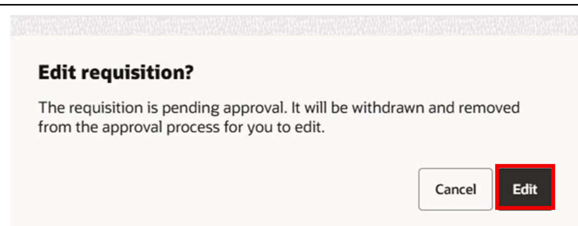
To amend, update or delete a requisition, it must first be withdrawn. Once withdrawn, edit accordingly. This will restart the workflow. A requisition in draft, rejected, returned or canceled status cannot be withdrawn. Only requisitions in draft or incomplete status may be deleted.

Click on the Requisition.	

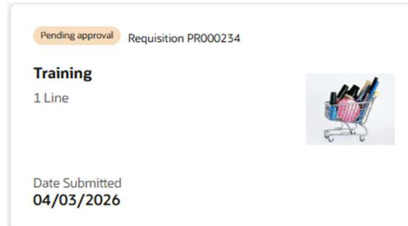
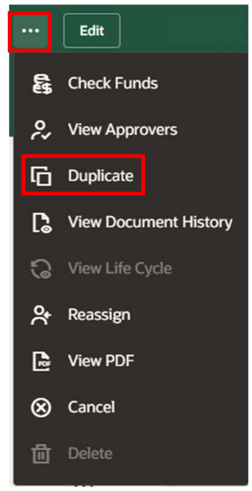
Click Edit.	
Click Edit.	

Withdraw from My Requisitions

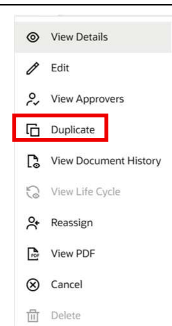
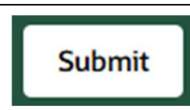
To amend or update or delete a requisition, it must first be withdrawn. Once withdrawn, edit accordingly. This will restart the workflow. A requisition in draft, rejected, returned or canceled status cannot be withdrawn. Only requisitions in draft or incomplete status may be deleted.

Click on the three dots on the PR line.	
Click Edit.	
Click Edit.	

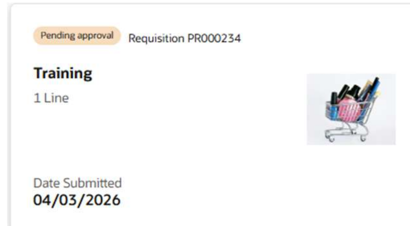
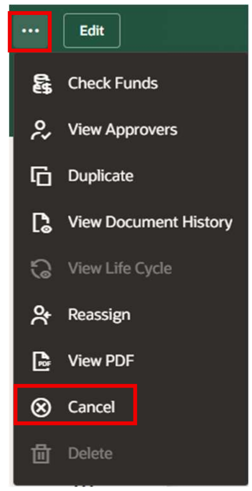
Duplicate from Self Service Procurement

Click on the Requisition.	
Click the three dots. Choose Duplicate.	

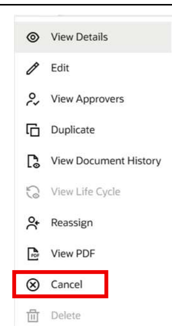
Duplicate from My Requisitions

Click on the three dots on the PR line.	
Click Duplicate.	
Make applicable edits and submit.	

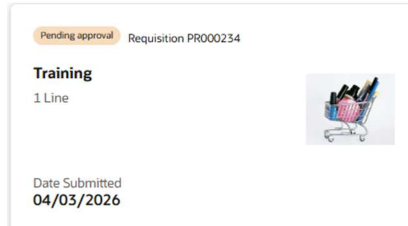
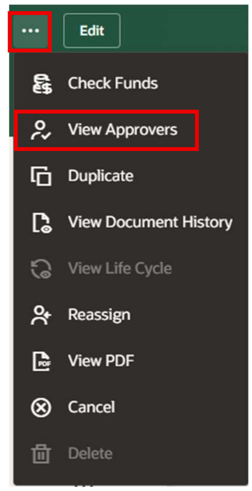
Cancel from Self Service Procurement

Click on the Requisition.	
Click the three dots. Choose Cancel.	

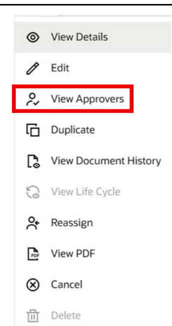
Cancel from My Requisitions

Click on the three dots on the PR line.	
Click Cancel.	

View Workflow from Self Service Procurement

Click on the Requisition.	
Click the three dots. Choose View Approvers.	

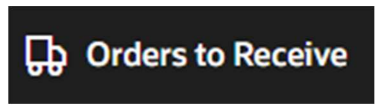
View Workflow from My Requisitions

Click on the three dots on the PR line.	
Click View Approvers	

Receipts

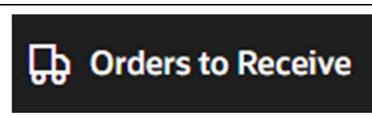
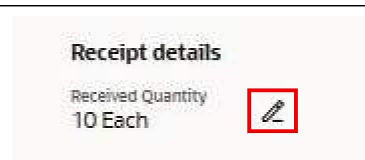
How to Receive an Entire Order

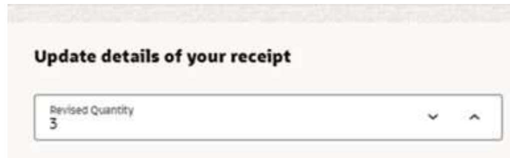
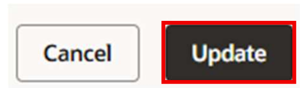
Receipts are required for purchase orders of $5,000 or more to support the three-way match (PO, invoice, and receipt) needed for payment. Orders below $5,000 follow a two-way match (PO and invoice) and do not require a receipt.

From the Procurement tab, click My Receipts (RSSP).	
Orders to be received will be listed under the Orders to Receive tab.	
Click Receive Now.	 Created receipts can be reviewed on the My Receipts tab

How to Receive a Partial Order

Receipts are required for purchase orders of $5,000 or more to support the three-way match (PO, invoice, and receipt) needed for payment. Orders below $5,000 follow a two-way match (PO and invoice) and do not require a receipt.

From the Procurement tab, click My Receipts (RSSP).	
Orders to be received will be listed under the Orders to Receive tab.	
Click the Details Icon.	
Click the Pencil under Receipt details.	

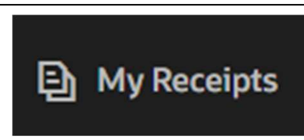
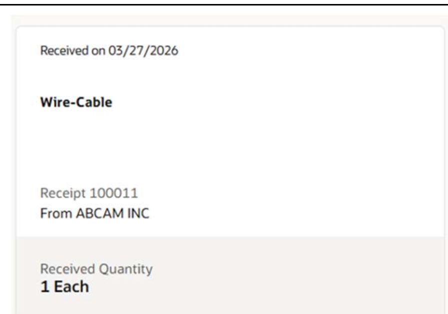
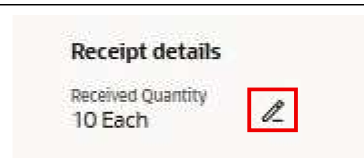
<table>
<tr><td>Enter the correct quantity or amount.</td><td>
</td></tr>
<tr><td>Click Update.</td><td>

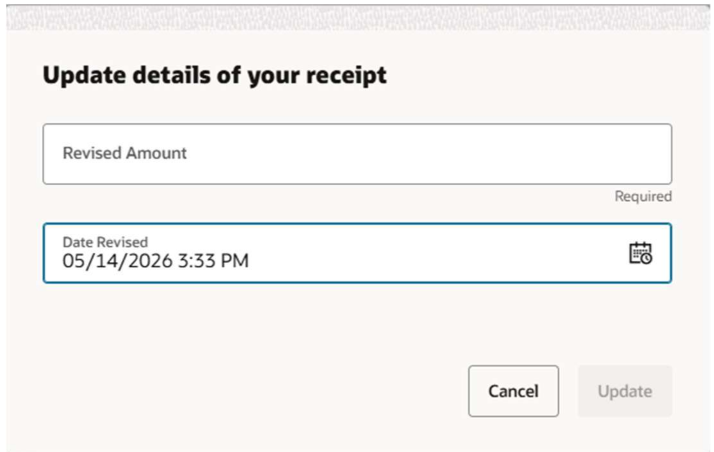
Created receipts can be reviewed on the My Receipts tab</td></tr>
</table>

How to Correct a Received Quantity or Amount

Receipts are required for purchase orders of $5,000 or more to support the three-way match (PO, invoice, and receipt) needed for payment. Orders below $5,000 follow a two-way match (PO and invoice) and do not require a receipt.

Corrections should be used when a receipt is entered incorrectly and needs adjusting.

<table>
<tr><td>From the Procurement tab, click My Receipts (RSSP).</td><td>
</td></tr>
<tr><td>Click on the My Receipts tab.</td><td>
</td></tr>
<tr><td>Locate the receipt to correct.</td><td>
</td></tr>
<tr><td>Click the Pencil next to the received quantity or amount.</td><td>
</td></tr>
</table>

<table>
<tr><td>Enter the correct quantity or amount.</td><td>

If the receipt should not have been entered at all, update the quantity or amount to “0”</td></tr>
<tr><td>Click Update.</td><td>
</td></tr>
</table>

Returns

How to process returns

Please follow the return instructions on the punch out or contact the supplier directly.

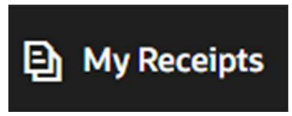
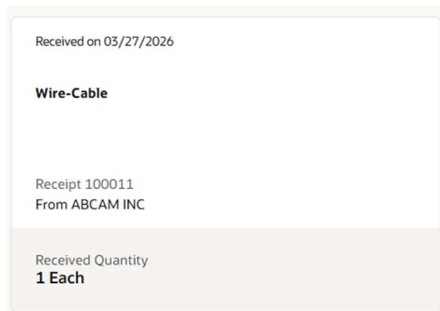
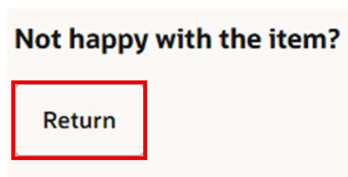
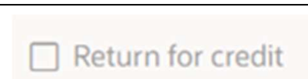
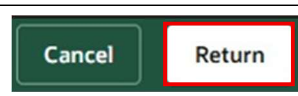
1. Initiate Return with Supplier
    a. Contact the supplier
    b. Follow their return process (RMA, label, etc.)
    c. WaveWorks does not process the return with the supplier
2. Record Return in WaveWorks (for recording purposes only)

How to Record a Return in WaveWorks (for recording purposes only)

Returning within WaveWorks is to initiate the credit process for the Project.

Please follow the return process before recording in WaveWorks.

This process should only be used when physical goods are being returned to a supplier.

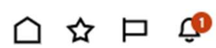
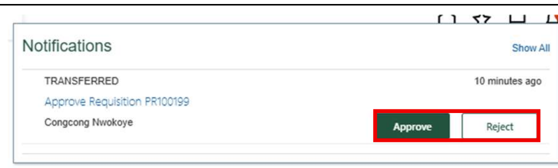
From the Procurement tab, click My Receipts (RSSP).	
Click on My Receipts.	
Click on the receipt to start the return.	
Click the Return button.	
Add the Quantity to return.	
Add a Reason for the return.	
Add the RMA information.	
Add any notes.	
Click the return for credit box.	
Click Return.	

Approvals

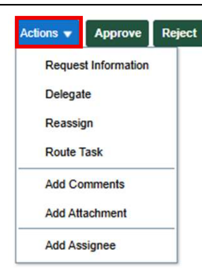
Approval from the Bell Notification

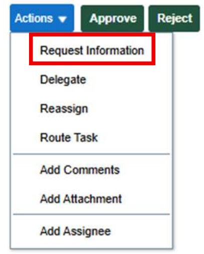
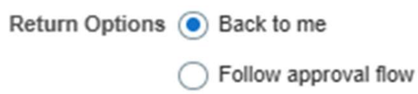
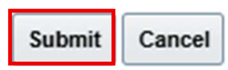
Users may receive notifications for several reasons:

1. Requisitions Approvals – new requisitions or change or change orders.
2. Invoice Notifications for freight or miscellaneous charges on an invoice that were not included in the PO. If approved through the notification a change order is not required.
3. Invoice Notifications for Subcontract payments will route to the PI and RASU before payment may be remitted to the subcontractor.

Click on the Bell Notification.	
Approve or Reject.	 Need more information, click on the blue hyperlink

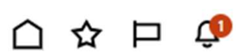
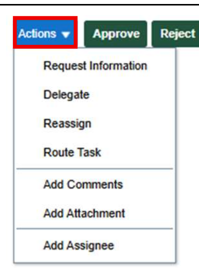
Request more info as an Approver

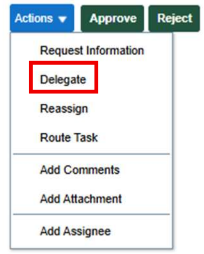
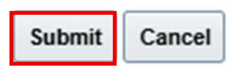
Click on the Bell Notification.	
Click on the Requisition for more information.	
Click Actions.	

Click Request Information.	
Do Not Update.	
Add a Comment.	 This is mandatory
Choose the Return Option.	 Back to me will return directly and skip prior approvers Follow approval flow will restart the workflow
Click Submit.	

How to Delegate an Approval

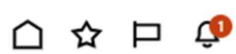
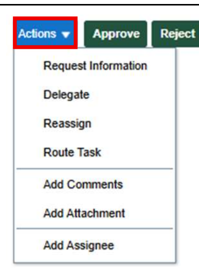
Delegate approves on behalf of an approver.

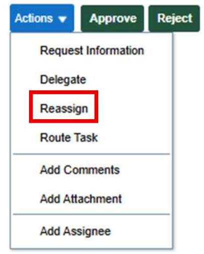
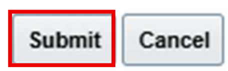
Click on the Bell Notification.	
Click on the Requisition for more information.	
Click Actions.	

Click Delegate.	
Choose the Delegate.	 Search is by first name.
Search for the Delegate. Click the Down Arrow. Click the Search button.	 **TIP** Use the Advanced Options and search the name containing to search by last name
Add a Comment if applicable.	
Click Submit.	

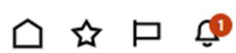
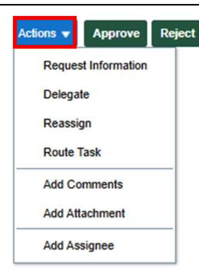
How to Reassign an Approval

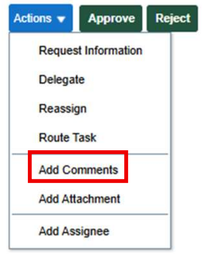
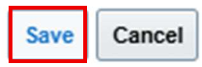
Reassign gives full ownership to another approver.

Click on the Bell Notification.	
Click on the Requisition for more information.	
Click Actions.	

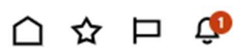
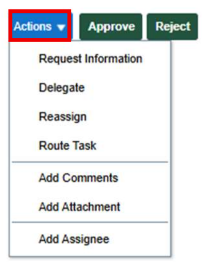
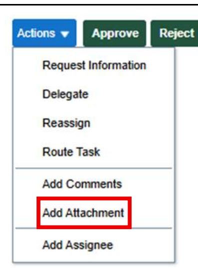
Click Reassign.	
Choose the person to assign to.	 Search is by first name.
Search for the Delegate. Click the Down Arrow. Click the Search button.	 **TIP** Use the Advanced Options and search the name containing to search by last name
Add a Comment if applicable.	
Click Submit.	

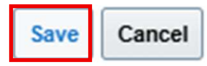
How to Add Comments as an Approver

Click on the Bell Notification.	
Click on the Requisition for more information.	
Click Actions.	

<table>
<tr><td>Click Add Comments.</td><td>
</td></tr>
<tr><td>Add the Comment.</td><td>
</td></tr>
<tr><td>Click Save.</td><td>
</td></tr>
</table>

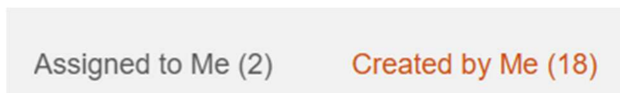
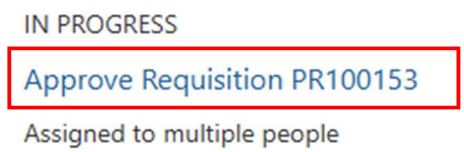
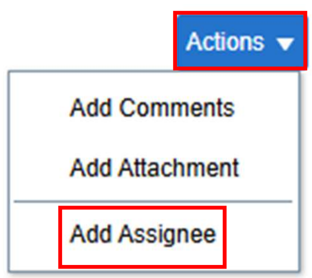
How to Add an Attachment as an Approver

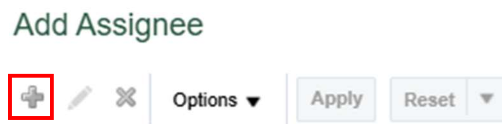
<table>
<tr><td>Click on the Bell Notification.</td><td>
</td></tr>
<tr><td>Click on the Requisition for more information.</td><td>
</td></tr>
<tr><td>Click Actions.</td><td>
</td></tr>
<tr><td>Click Add Attachments.</td><td>
</td></tr>
<tr><td>Add the Attachment.</td><td>
</td></tr>
</table>

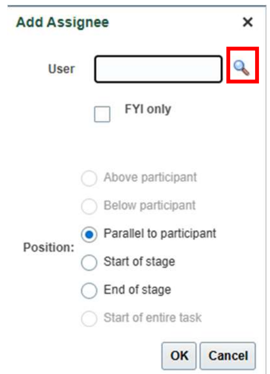
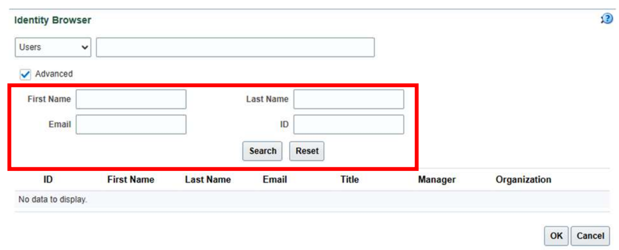
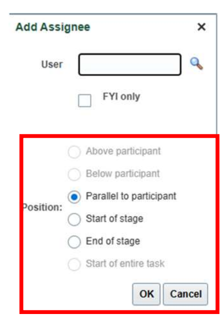
Click Save.	

How a Requisitioner adds an approver

A requisitioner may add an ad hoc approver to the workflow

Click on the Bell Icon.	
Click on Show All.	 Click on the blue hyperlink to open
Click on Created by Me.	
Click on the unapproved Requisition.	 Click on the blue hyperlink to open
Click on the Down Arrow on the Actions Menu. Click Add Assignee.	
Highlight the step where the approver should be added.	 Only future steps may be chosen

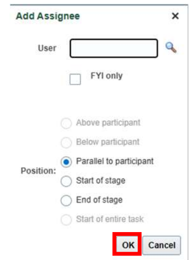
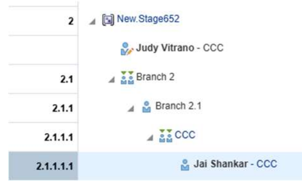
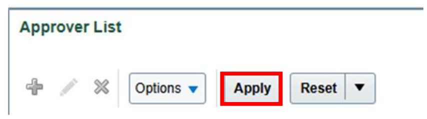
<table>
<tr><td>Click the Plus Sign.</td><td>

The plus sign shade will change when a correct step is chosen</td></tr>
<tr><td>Search for the approver using the magnifying glass.</td><td>
</td></tr>
<tr><td>Search for the approver.</td><td>
</td></tr>
<tr><td>Choose the approver.</td><td>
</td></tr>
<tr><td>Click Ok.</td><td>
</td></tr>
<tr><td>Choose the stage to add the approver.</td><td>

Parallel to participant will allow either approver in that stage to approve

Start of stage will send to the added approver first

End of stage will send to the added approver last</td></tr>
</table>

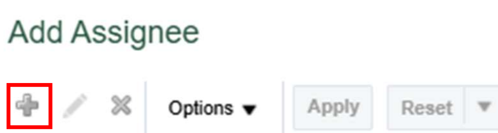
<table>
<tr><td>Click Ok.</td><td>
</td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>Click Apply.</td><td>
</td></tr>
</table>

How an Approver adds another approver

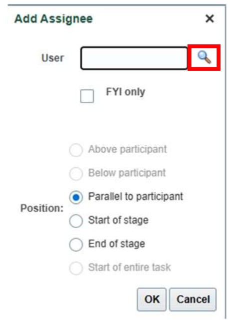
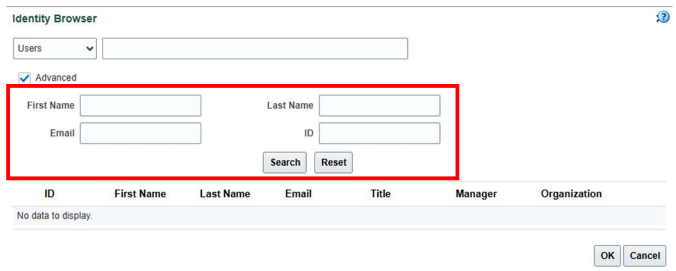
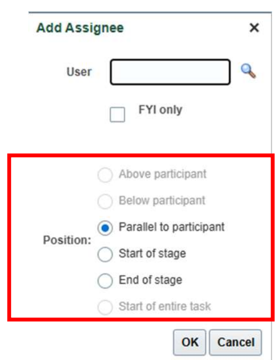
An approver may add an ad hoc approver to the workflow.

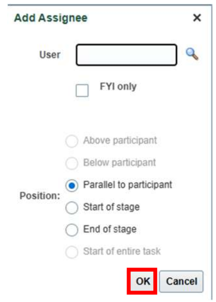
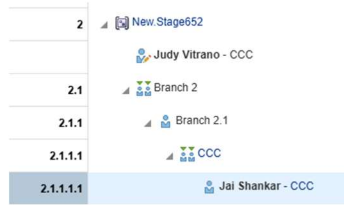
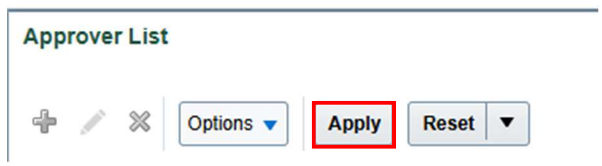
<table>
<tr><td>From the Approval, Click on the Actions down arrow.

Click Assignee.</td><td>
</td></tr>
<tr><td>Highlight the step where the approver should be added.</td><td>

Only future steps may be chosen</td></tr>
<tr><td>Click the Plus Sign.</td><td>

The plus sign shade will change when a correct step is chosen</td></tr>
</table>

Search for the approver using the magnifying glass.	
Search for the approver.	
Choose the approver.	
Click Ok.	
Choose the stage to add the approver.	 Parallel to participant will allow either approver in that stage to approve Start of stage will send to the added approver first End of stage will send to the added approver last

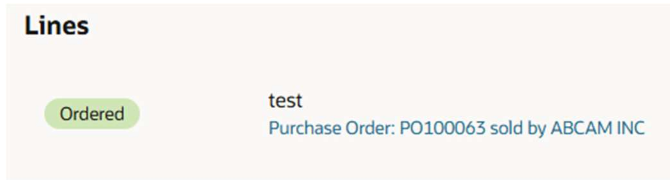
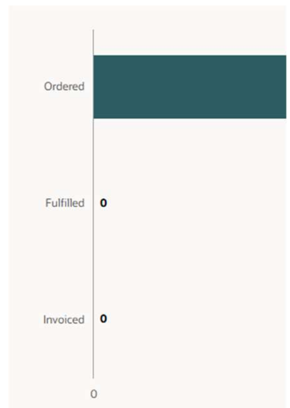
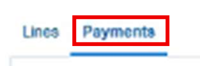
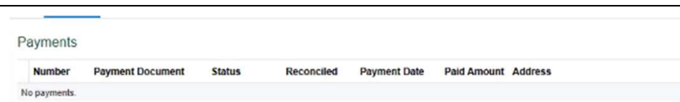
Click Ok.	
	
Click Apply.	

POs

After a requisition is fully approved, a PO will be generated by the system. This PO will be sent to the supplier so they can fulfill the service or good to Tulane.

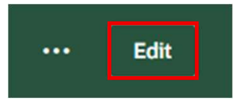
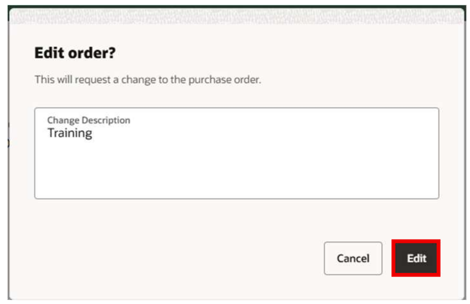
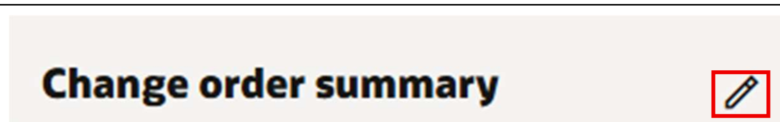
View

From the Procurement tab, click Purchase Requestions.	
Open the Requisition from the Self-Service Procurement or My Requisitions Tab.	

Click on the Purchase Order hyperlink under Lines.	 **TIP** View Life Cycle is also available in the 3 dots next to edit on the Requisition
Toggle to Order Life Cycle.	
Hover over the highlighted line to see a status.	 **TIP** Payment legend is to the right
Click on the Invoice hyper link for more information.	 **TIP** Scroll down for invoice information
Toggle to Payments.	
Find applicable information in that tab.	

Edit a PO/Create a Change Order

From the Procurement tab, click Purchase Requestions.	

Open the Requisition from the Self-Service Procurement or My Requisitions Tab.	
Click Edit.	
Enter your Change Description.	 This is mandatory to edit
	 The new screen will show the Change Order
Update the Quantity or Price if applicable.	
Update the Delivery Information or Accounting Information if applicable.	 This can also be done at the line item
Click Submit.	

Commitment vs Obligation

Requisition	Funds Status Reserved Reserved status indicates a commitment
Open Purchase Order	Funds Status Liquidated Liquidated status indicates an obligation

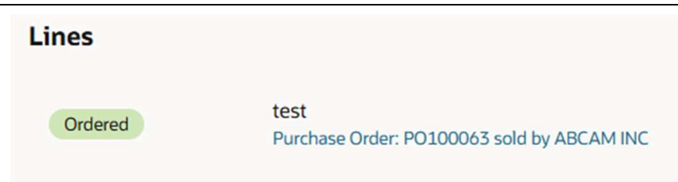
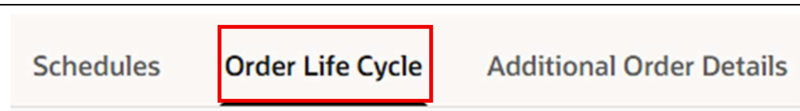
Invoices

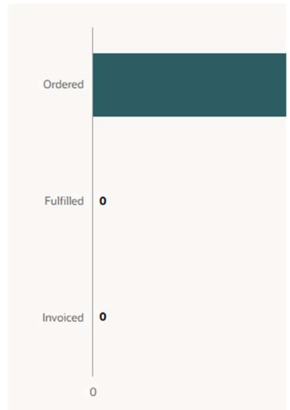
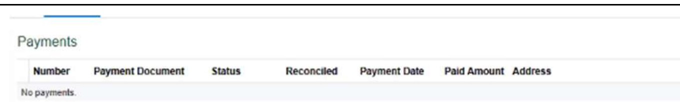
Invoices are how suppliers request payment from Tulane after services or goods have been provided.

Invoices should be emailed to accountspayable@tulane.edu and should include the PO number.

If an invoice has additional charges for freight or additional lines not included on the PO, a notification will be sent to an approver in order to remit payment.

View Invoices

From the Procurement tab, click Purchase Requestions.	
Open the Requisition from the Self-Service Procurement or My Requisitions Tab.	
Click on the Purchase Order hyperlink under Lines.	 **TIP** View Life Cycle is also available in the 3 dots next to edit on the Requisition
Toggle to Order Life Cycle.	

Hover over the highlighted line to see a status.	 **TIP** Payment legend is to the right
Click on the Invoice hyper link for more information.	 **TIP** Scroll down for invoice information
Toggle to Payments.	
Find applicable information in that tab.	

Appendix

RASU Expenditure Types

Expenditure Type Value	Expenditure Type Name
63410	Drug Studies Participant
63420	Participant Support
63440	Participant Incentives
66110	Trainee Stipends
67130	Consulting
67135	Consultant Travel
67140	Professional Services
67420	Patient Care
67510	G/C Subcontractor1
68110	Rentals – Other
68120	Rental Expense - Real Estate
68210	Mov Equip Repairs & Maint – Photocopiers
68220	Mov Equip Repairs & Maint – Office
68230	Mov Equip Repairs & Maint – Computer
68240	Mov Equip Repairs & Maint - Scientific Equip
68250	Major Plant Maint & Repairs- Elevators
68260	Mov Equip Repairs & Maint- Other Dept Use
72420	Facilities Other
73130	Acgme Resident Health, Life, Disability, Immuniz Exp
73510	Student Aid Awards Trainee
74220	Local Commuting- Qual Leased Parking
74520	Education Allowances- International
74530	Housing Allowances
74540	University Leased Vehicles- Foreign
74550	Other Business Associates- Foreign
74560	Relocation- Qualified moving
74570	Visiting Faculty Allowances
74580	International Travel and Per Diem
74590	International Workshop/Conference Expense
75120	Minor Equipment- Computer
75301	Travel-Domestic
75302	Travel-Foreign
75401	Recruitment Expenses
75402	Business Entertainment
78420	Prizes and Awards
78430	Mov Equip Repairs & Maint- Instrumentation
82110	Land Expense
82120	Building Expenses
82130	Improvements- Non-Buildings
82210	Conv Only Office Equipment > $2,500
82220	Capital Equipment > $5,000