Where do I begin?

eReq is a web-based application used for processing requisitions and viewing their current status.

1. Go to eReq your favorite way:
   1. From your Internet Browser go to: buffalo.edu/admin-services
   2. Click on eReq from the Quick Links list
   Or
   3. Go to MyUB https://myub.buffalo.edu
   4. From the Administrative Menu, click Business then eReq- purchase requisition from the list of Business Systems

2. Enter your UBITName and password.

How to Approve an eReq at the RF Approver Step:

Open the eReq process from either the link below or from the link in the email notification that you have work to do.
https://myub.buffalo.edu/ereq/pw/scripts/ereq_client.cgi

1. Sign into the UB Workflow client with your UBITName and password.
2. Go to the Inbox Tab
3. Open the Incident by clicking on the Incident Number. eReq will open to the Summary of the Incident selected.
4. Review the Summary to see what is being ordered.
5. If you agree with what is being purchased, open the Funding tab.
6. Click on the button that reads Approve located in the Current Funding section next to the suggested account number that was entered by the creator. If there are multiple accounts on this Incident that require your approval, repeat this process for each account.
7. Go to the My Actions tab and select Approve and Submit from the dropdown list of actions.
8. Click Save and Finish (located at the bottom right section of the screen) to complete the process.
9. Click Close Window which returns you to your Inbox Tab.
10. If there are additional incidents that require your approval - repeat the above process.

If Notes or Attachments are indicated in the requisition details area, be sure to click on the relevant tab(s) to view any pertinent information prior to approving the eReq.

Note: As an Approver, you have the ability to change any item, quantity, supplier or account that was entered by the creator.

Note: If there are any additional RF accounts funding this purchase that need approval by another PI, select submit for approval and the PI’s name from the Approver dropdown list. Save and Finish will send the requisition on to them for their approval.

Questions? — contact one of the following people either by email or phone:

Sandy McMullen, mcmullen@buffalo.edu 645-4554
How do I Delegate Approval Authority?

Delegation of Approver authority for RF Accounts can be processed by the PI through the RF Delegate System or by submitting an eReq RF Delegate Authorization Form

eReq RF Delegate Authorization Form

Go to the Administrative Services Gateway website at buffalo.edu/admin-services. From the Quick Link list, select eReq RF Delegate. Read the online instructions thoroughly for each area. Below is a brief overview of each section.

Log in to the system with your UBITName and password.

Adding a Delegate

The first screen will display a list of all of the Accounts (Awards/Projects/Tasks) that are assigned to you.

You will also use this screen to input the UBITName of the person you wish to delegate to, or if unknown, search on the person’s LAST name to locate and then select the correct UBITName. Verify that you have the correct person. Click on the Add Delegate button.

Adding Accounts to a Delegate:
The default is All, meaning all current and future accounts will be delegated to the user indicated. If that is acceptable, click on Add New Rule to complete the process.

If you wish to allow the delegate to have approval authority on only certain accounts, you may designate which accounts by either clicking All under Award (for approval authority on All Awards) or by clicking on a particular Award number to designate only certain ones. The same procedure holds true for designating either all or individual Projects and Tasks under specific Awards.

Example:

<table>
<thead>
<tr>
<th>Award</th>
<th>Project</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
<tr>
<td>12345</td>
<td>All</td>
<td>All</td>
</tr>
<tr>
<td>12345</td>
<td>678910</td>
<td>All</td>
</tr>
<tr>
<td>12345</td>
<td>678910</td>
<td>2</td>
</tr>
<tr>
<td>12345</td>
<td>555555</td>
<td>1</td>
</tr>
</tbody>
</table>

Once you have completed selecting individual P-T-A’s for a delegate, click on Add New Rule for each P-T-A.

Repeat this process to add additional delegates for your account(s).

Editing a Delegate:

1. From the Principal Investigator (PI) Account Screen, click on the radio button next to the name of the delegate and click on Edit Delegate.

2. Check the radio button next to the desired account number requiring a modification of any of its Project/Task/Award combinations. Make your desired changes and select Change Selected Rule to complete the process.

How do I Delegate Approval Authority? continued

3. To add a new account number to this delegate’s list of accounts, follow the procedure above for Adding Accounts to a Delegate.

4. To delete an account number assigned to this delegate, check the radio button next to the account to be deleted and click on Delete Selected Rule to remove delegation authority for this account.

5. Use the Back button to return to the PI Account Screen.

Deleting a Delegate

1. From the PI Account Screen, click on the radio button next to the desired Delegate and click on Delete Delegate.

2. You will receive a request for validation Are you sure you want to delete this?

3. Answer OK to delete this delegate and all their delegation authority on any/all of your accounts.

4. Answer Cancel if you do not wish to delete this delegation and remain unchanged.

Viewing your Delegates:

1. On the PI Account Screen, click on the radio button next to the delegate you wish to view. All of your accounts delegated to this person will be highlighted.

2. Click on the magnifying glass next to any account number and the names of all delegates with approval authority on this account will be displayed.

Click on the Close Window button to return to the PI Account screen.

Points to Remember

As the Principle Investigator (PI), you have the right to delegate signatory authority on your accounts to another person and at any time, you may add, edit or delete that authority.

Read the online instructions thoroughly covering each area –

- You will need to know the UBITName of the person you wish to delegate to or you may search for his/her UBITName by name.
- You may delegate authority on ALL of your accounts to a particular person or only Selected Accounts.
- Choosing “all” in the three columns will delegate approval authority on all existing and future accounts.
- The dropdown lists for Awards/Projects/Tasks will allow you to delegate authority to a particular person by individual account(s).

The Can Grant button should only be checked if you wish to allow your delegate the ability to further delegate signatory authority to another person.