

Web Voucher – Requesting New Vendors & Reimbursees

Overview

When processing invoices or reimbursement requests in the Web Voucher (WV) system, you may occasionally need to issue payments to people or companies that are not already in the system or you may need to have a check mailed to a different address than the ones that appear in the supplier search. When this happens, you can use the "Vendor Request" option to submit a request to your approver for the creation of the new supplier or supplier site.

All requests for new vendors must be authorized by a local approver before being submitted to the Accounts Payable Vendor Hotline. The instructions on the following pages detail the steps necessary to complete the new vendor request process. Questions about setting up new vendors can be emailed to ap_vendorhotline@harvard.edu.

Processing New Vendor Requests

To request a new supplier, reimbursee (employee or non-employee), or site for an existing vendor, log into Oracle and select Vendor Request. This option is available above WV Main Menu option on the Oracle Personal Homepage.

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Logout Help Copyright (c) 2006, Oracle. All rights reserved.	
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TIP Before requ	 iesting a New Ve	ndor, perforn	n a search to ver	ify a Vendor	does not exist	that will meet	your ne	ed
List of My Reques	ts			-				
Search	our eearch criteri	is and coloct	the "Go" hutton	to cao tha r	ecult. Note that	t tha caarch ic	caco in	concitivo
Vel	ndor Name			to see the r	esult. Note that	t the search is	case III	sensitive.
Empl	oyee HUID							
	Go	Clear						
If the Vendor a	ppears, please cli	ick on the "Si	tes" button to vie	ew sites rela	ted to the Vend	or and to requ	est a Nev	v Site if
(Request a N	w Vendor)							
	Employee	Vendor		Women	Small	Minority		Inactive
Vondor Nam	e HUID	Туре	Organization	Owned	Business	Group	Sites	Date
No search								

From the Vendor Search Screen, you can choose one of the following actions:

Action	Screen Detail	Notes
View submitted requests	List of My Requests	This shows details about the current status of any requests that you have submitted within the last 90 days.
Search for an existing vendor	Vendor Name	To search for a term that is not the beginning of the vendor's name, enter "%" as a wildcard (for example, use "%Sample" to search for "Tom A Sample").
	Go (Clear)	If your search turns up a match, click <u>Sites</u> to check the addresses that are already on file for that vendor.
Request a new vendor	(Request a New Vendor)	Use the search tool first to confirm that the vendor is not already in the system.
Request a new site for an existing vendor	(Request a New Site)	To request a new site, search for the vendor first, then click Sites to view their current addresses. The Request a New Site button appears on the following screen.

Refer to the following pages for details of completing a New Vendor Request.

New Vendor Request	t - Microsoft Internet Explorer		
File Edit View Favo	rites Tools Help		
ORACLE	Vendor Request		Hone Logout
New Vendor Requ	Jest		
			Submit Request Cancel Request
Vendor Informat	ion		
∗ Vendor Name			
∗ Vendor Type	•		
Business Classi	fications		
🗌 Woman Own	ed 🔲 Small Business Minority Owned	*	
𝗭 TIP The above busin	ess classification fields are optional		
Remit Address		Permanent Addr	ess
			Same as Remit Address
* Address Line1		* Address Line1	
Address Line2		Address Line2	
Address Line3		Address Line3	
★ City		★ City	
	The city name will be used to derive the site name		The city name will be used to derive the site name
State	×	State	<u> </u>
Postal Code		Postal Code	
Province		Province	
Country	United States	Country	United States
Approver Inform	ation		
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* Approver Name			
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To Request a New Vendor:

Task	Screen Detail	Notes
1) Enter the Vendor Name as it should be listed.	* Vendor Name	If you enter an existing vendor, the system will prompt you to request a new site instead. Refer to the <u>Locating Vendor</u> <u>Records</u> job aid for details about the vendor naming conventions.
2) Select a Vendor Type from the provided drop-down list.	* Vendor Type	Once you select the vendor type, additional fields will appear based on that choice.
 Fill out any additional vendor details that are 	Harvard Employee • Employee's HUID & Employee has Direct deposit	Required info: Employee's HUID Number
required for the selected Vendor Type .	Individual – US Citizen • Social Security Number Tax Reporting Name Office number of you dankes of you dankes of you dankes	Required info: Social Security Number
Some examples of additional vendor details are:	Individual – Non US Citizen Social Security Number Country Issuing Passport Security Number Vea Type or puchtadion vill be encyted	A Foreign National Information Form must also be submitted to UFS Customer Service.
	Vendor – US – Sole Proprietorship * Social Security Number Tax Reporting Name To readed 4 affect from the chine of the name	Required info: Social Security Number
	Vendor – US Corporation Federal Tax IDEIN Tax Reporting Name Crive readed if different homo- trier runteers ory (to distress)	Recommended info: Federal Tax ID/EIN Tax Reporting Name

Required fields are marked with a *

For many fields, you can click on the \checkmark symbol to search for appropriate values.

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	1				
Vendor Information	^				
Vendor Name Sample New Vendor					
* Vendor Type Vendor - Non US Corporation					
Federal Tax ID/EIN Tax Reporting Name Enter numbers only (no dashes or guarcustor) Will be encysted					
Business Classifications					
□Woman Owned 🗹 Small Business Minority Owned					
Ø TIP The above business classification fields are optional					
Remit Address Permanent Address					
✓ Same as Remit Address					
* Address Line1 123 Main Street * Address Line1 123 Main Street					
Address Line2 Address Line2					
Address Line3 Address Line3					
* City Cambridge * City Cambridge					
The city name will be used to derive the site name The city name will be used to derive the site name					
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* Approver Name Harvard, Jane 🚀					
(Submit Request) (Cancel Request)	~				
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Task	Screen Detail	Notes
4) Optionally, enter the Business Classifications information.	Business Classifications	
5) Enter the Remit Address that the vendor's payment should be sent to.	Address Line2 Address Line2 Address Line2 Country Tor city name will be used to derive the site name State Postal Code Province Country United States	This is the address that AP should send the payment to. For employees, you can click on the Load Office Address box to pull in their Harvard address.
6) Enter the vendor's Permanent Address .	Permanent Address Same as Remit Address Address Line1	If this is the same as the Remit Address, click on the checkbox and the information will be copied over from those fields.
7) Enter your Tub , Org , and the Approver you want to authorize this request.	Approver Information Tub 《 Org 《 * Approver Name 《	If you have a default Tub, Org, or Approver in Web Voucher, these will fill in automatically. Even if you can approve your own web vouchers, you will still need another person to approve any new vendor requests.
8) Click Submit Request.	Submit Request	Approvers can view requests awaiting their authorization on the Notifications screen.

After submitting a request, you should use an appropriate local business process to let your approver know that a new vendor request is awaiting their authorization.

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