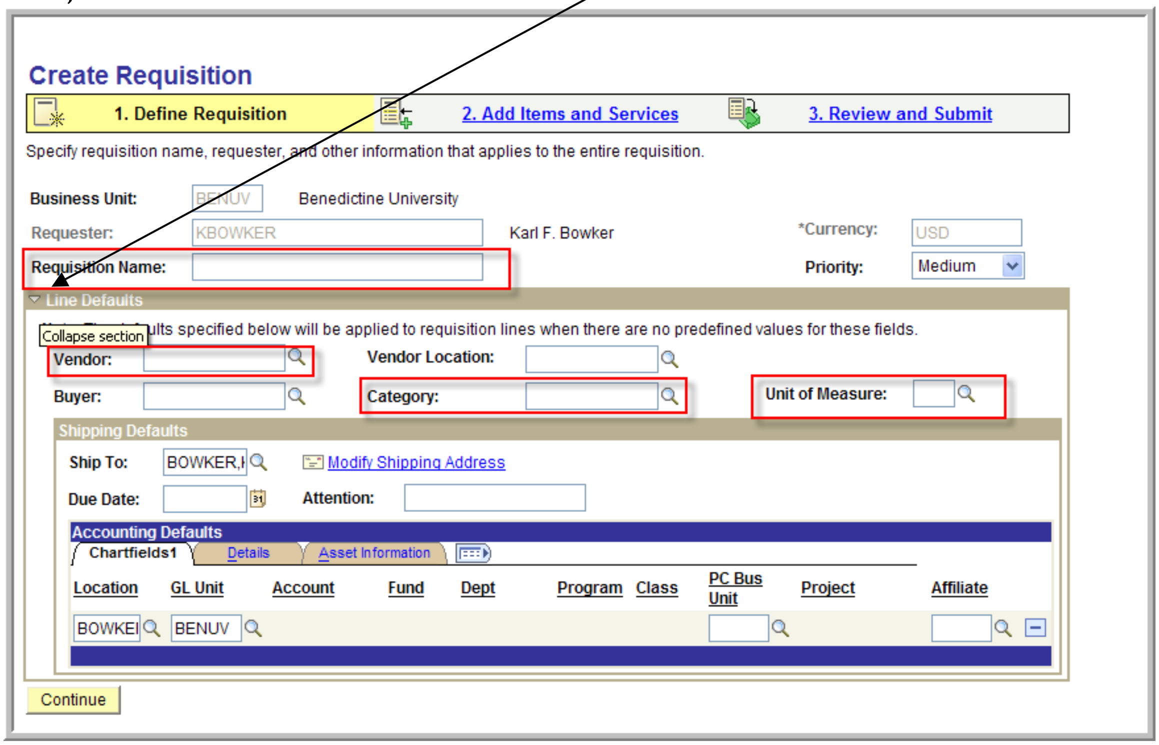
How to Enter a Requisition in ePro

Step 1) Log in to the eProcurement system.

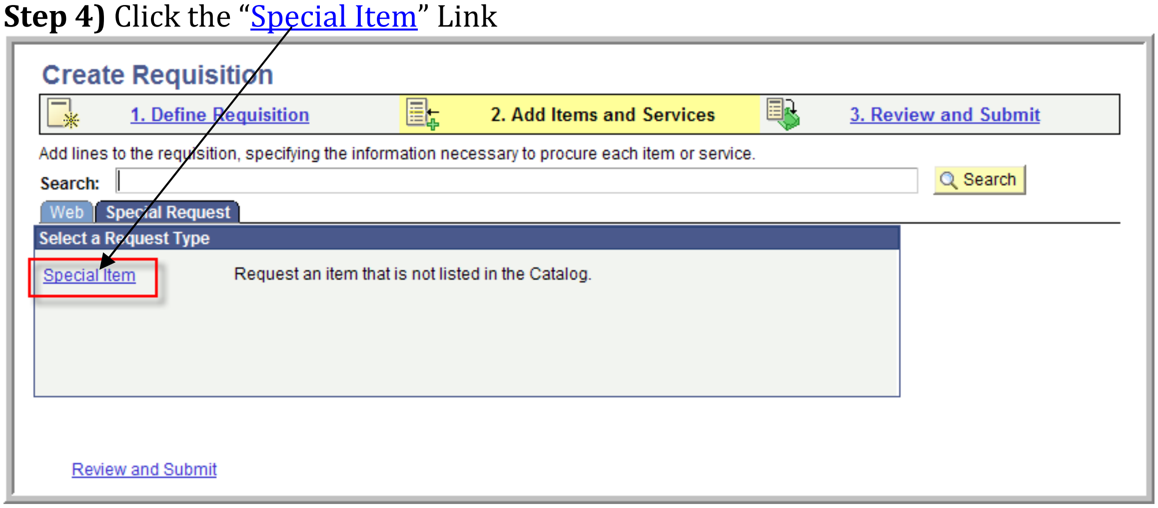
Step 2) Navigate to the Requisition entry page: **eProcurement > Create Requisition**

Step 3) Optional – Enter in Requisition Name - a description of the request, to help you identify this requisition as it flows through the system.

If the requisition will be more than 1 line you may want to enter in line defaults for Vendor, Category and Unit of Measure. Click the icon to display line defaults. Next, click the Continue button or "2. Add Items and Services" link.



Step 4) Click the "Special Item" Link

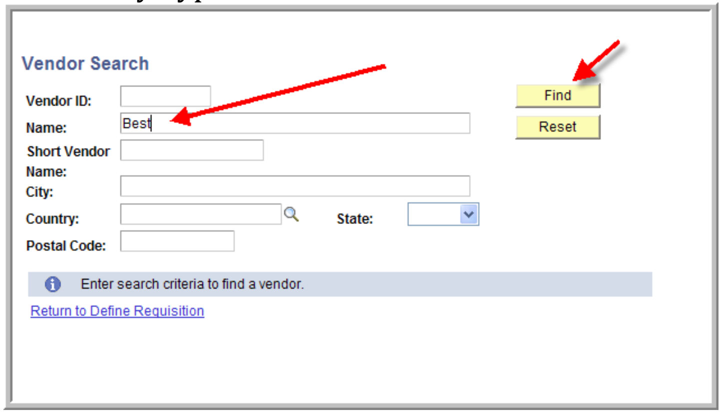


Step 5) Complete the "Add Items and Services" page:

Required Fields

1) Item Description – **Important !** For blanket/annual PO's , please include "Annual PO" or "Blanket PO" in the item description. This will help Accounts Payable identify it as a blanket PO when they apply invoices to it.
2) Price
3) Quantity
4) Unit of Measure
5) Category – Choose "REGULAR_PO" "BLNKT", "IT" or "MARCOM".
    a. **Important**! – You must select "IT" for all Information Technology purchases. These types of purchases must be approved by the Director of IT and only by selecting the "IT" Category will the system know to forward the requisition to the IT director for their approval. If the answer is yes to any of the following it does require the IT director's approval.
        i. Does it plug into a wall jack?
        ii. Does it utilize the campus wireless network
        iii. Is it software?
        iv. Does it require a license agreement?
        v. Is it attached to a University owned computer device?
        vi. Will this purchase require IT staff support?
    b. **Important!** You must select "MARCOM" for all Marketing Communications purchases. These types of purchases must be approved by the Executive Director of Marketing and Communications and only by selecting the "MARCOM" Category will the system know to forward the requisition to MarCom for approval. If the answer is yes to any of the following, it requires MarCom's approval:
        i. Is the vendor a printer?
            1. Does the Benedictine University name or logo appear on what you are printing?
        ii. Is the vendor a promotional products company?
            1. Does the Benedictine University name or logo appear on what you are printing?
        iii. Is the vendor a signage firm?
            1. Does the Benedictine University name or logo appear on what you are printing?
        iv. Is the vendor a creative agency, website development firm, media buyer, advertiser, member of the media, photographer/videographer, public relations firm, freelance writer, freelance graphic designer or marketing automation firm?

6) Vendor ID - Select a vendor by using the search feature. When you click the icon you will be brought to a search screen; I recommend using the Name field to search for the vendor. Put in any portion of the name and click the Find button . For example if you want to find the vendor ID for Best Buy, type in Best in the "Name" field and then click find.



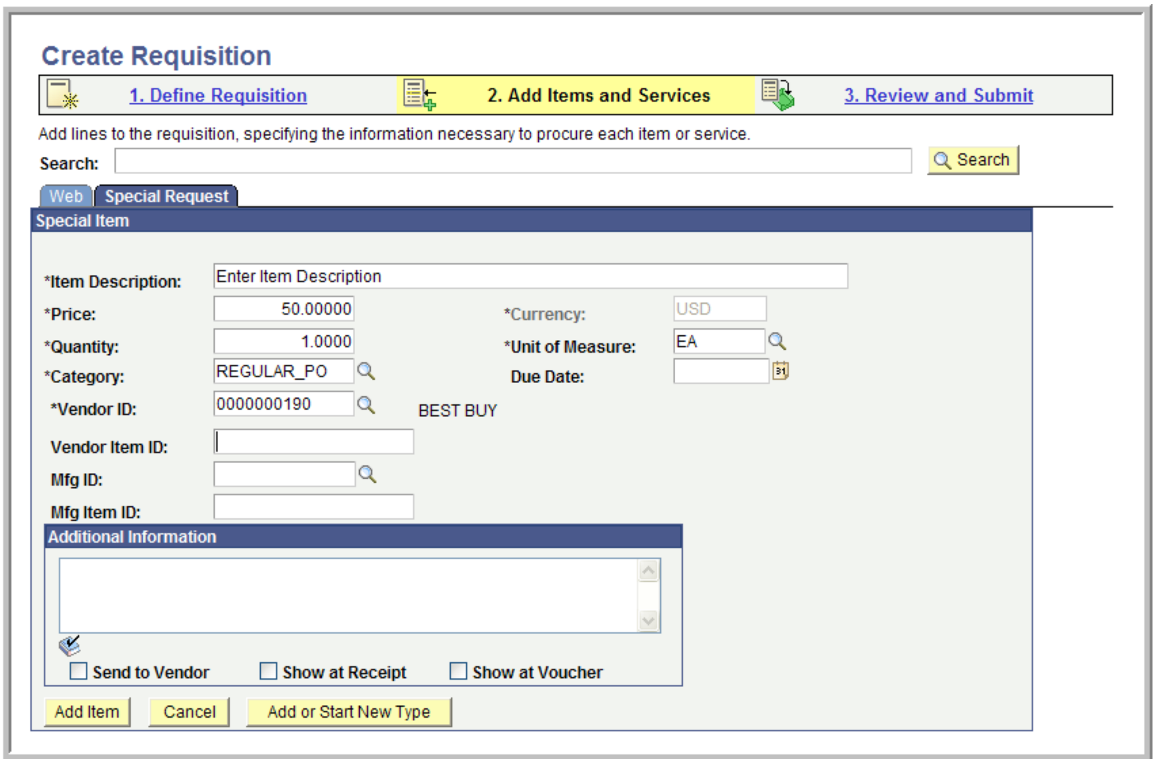
In this example there where 22 vendor ID's whose Name field contained "best" in it. Only the first 10 vendors will be shown, click View All to see a list of all 22 vendors. You can also sort the results by clicking any of the headers such as Name . When you've found the vendor ID you were looking for, click the link of the Vendor ID to select it. If you cannot find the vendor you will need to have the vendor complete a W-9 form and email the competed form to "New Vendor". You will be notified when the vendor has been added.

Customize | Find | View All | First 1-10 of 22 Last

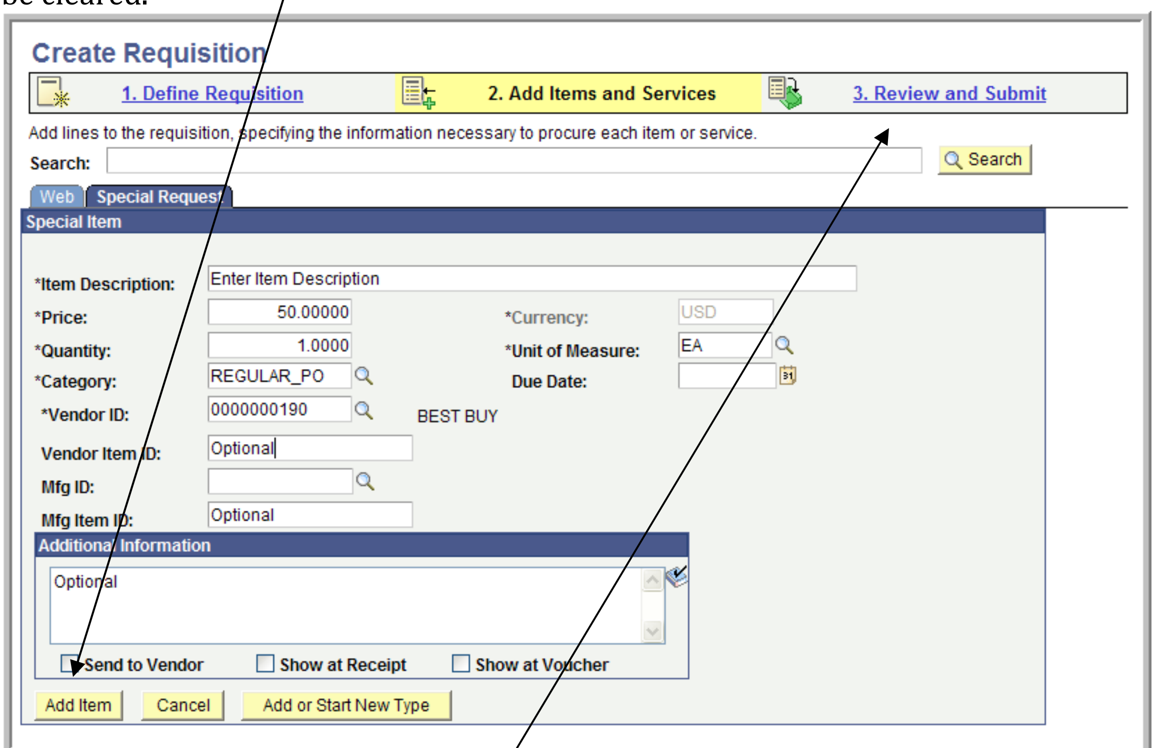
	Vendor ID	Name	Location	Address	City	State	
1	0000000022	BEST LIMOUSINE	Main	1463 S WILLIAMS ST	WESTMONT	IL	
2	0000000023	BEST LOCKING SYSTEM OF NORTHERN IL	Main	111 N Kemman Avenue	LaGrange	IL	
3	0000000024	BEST MESSENGER SERVICE	Main	671 Executive Drive	Willowbrook	IL	
4	0000000190	BEST BUY	Main	7601 Penn Avenue S	Richfield	MN	
5	0000000942	BEST ACCESS SYSTEMS	Main	22078 NETWORK PLACE	CHICAGO	IL	
6	0000003739	BEST WESTERN/CLEARWATER BEACH ECONO LODG	Main	625 S. GULFVIEW BLVD	CLEARWATER BEACH	FL	
7	0000004158	BEST PRACTICE RESOURCES, INC.	Main	26 W. 413 GRAND AV.	WHEATON	IL	
8	0000004919	BEST WESTERN HIBISCUS MOTEL	Main	1313 SIMONTON STREET	KEY WEST	FL	
9	0000005242	UNIVERSAL ASBESTOS REMOVAL, INC.	Main	20W201 101ST STREET	LEMONT	IL	
10	0000005271	BEST WAY AUTO SALE INC.	Main	12231 S. CICERO AVE.	ALSIP	IL	

Optional Fields

1) Vendor Item ID
2) Additional Comments – If you click the "Send to Vendor" box the comments you have entered will appear on the PO



Step 6) Click the Add Item button. The items you have entered on this page will then be cleared.



Step 7) repeat steps 5 and 6 until all requisition lines are added. After you have added your final item, click the "Review and Submit" tab.

Note: You are not limited to using a single vendor for each requisition. You are able to enter different vendors for each row, so if you have a project that consist of purchases from more than one vendor you may want to consider consolidating it all into one purchase req. When the req is sourced into a PO, you will receive a separate PO for each vendor.

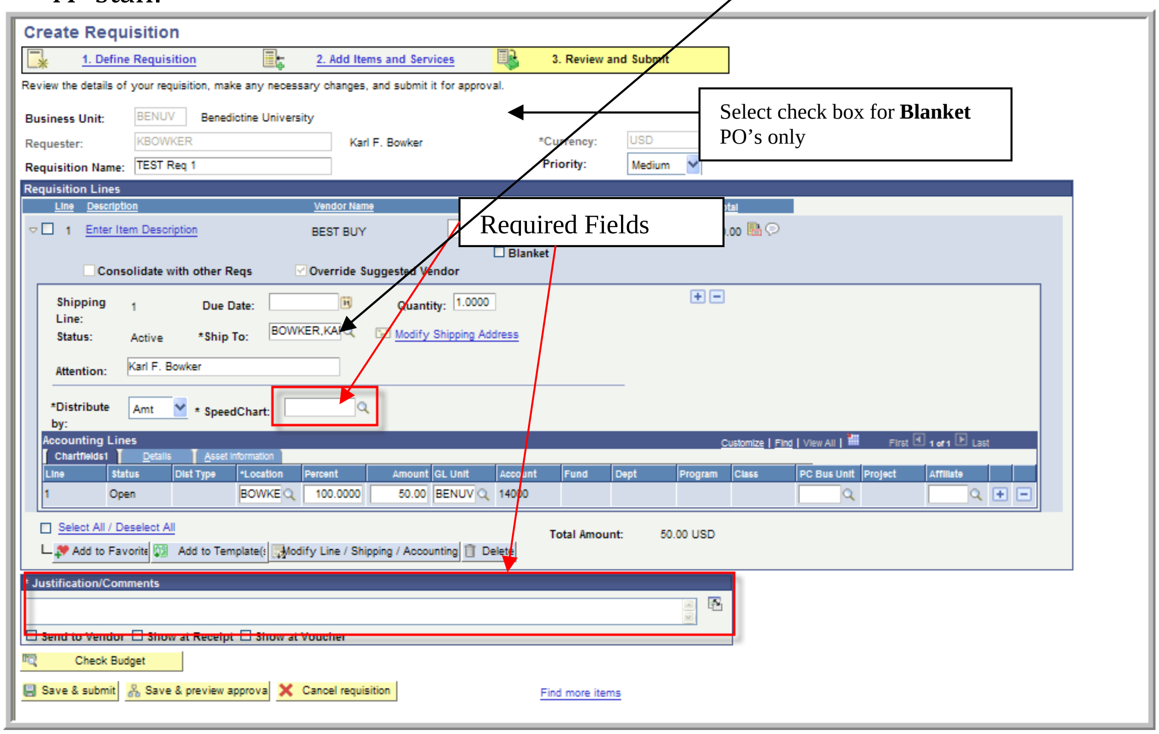
Step 8) Complete the "Review and submit" page

Required Fields

1) Select the SpeedChart that you would like the item charged to. You will need to do this for **each** item line that was added.
2) Enter your justification for the purchase.

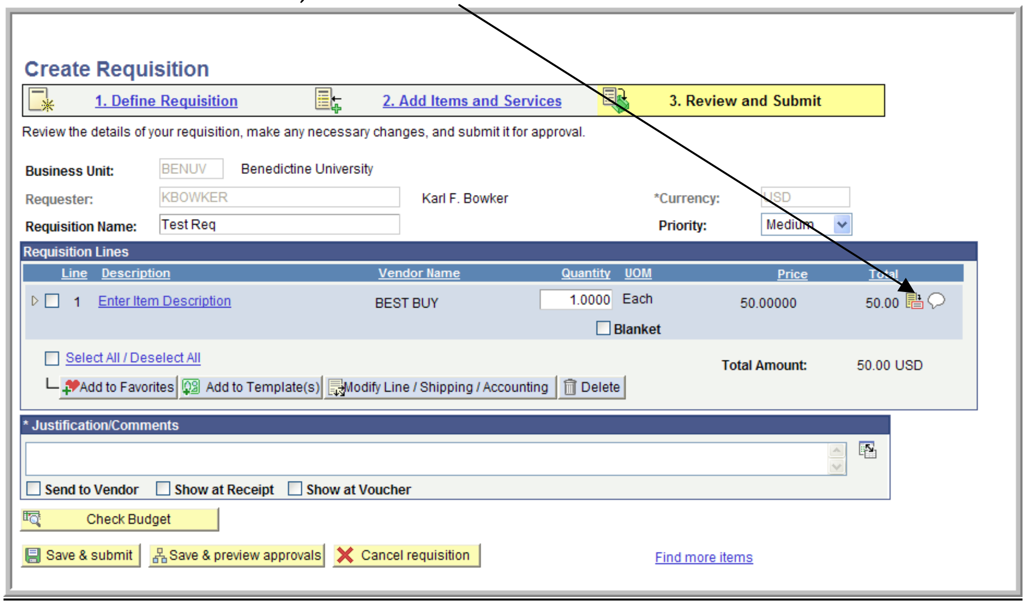
Optional Fields

1) If the this is for a blanket purchase order you must check the "Blanket" check box for each item line, failure to do so could cause the PO to close prematurely
2) Ship to location – If you want the item you are ordering shipped to someone other than yourself, you can modify the ship to location here. For example , sometimes IT will request that you enter in the ship to location of one of the IT staff.

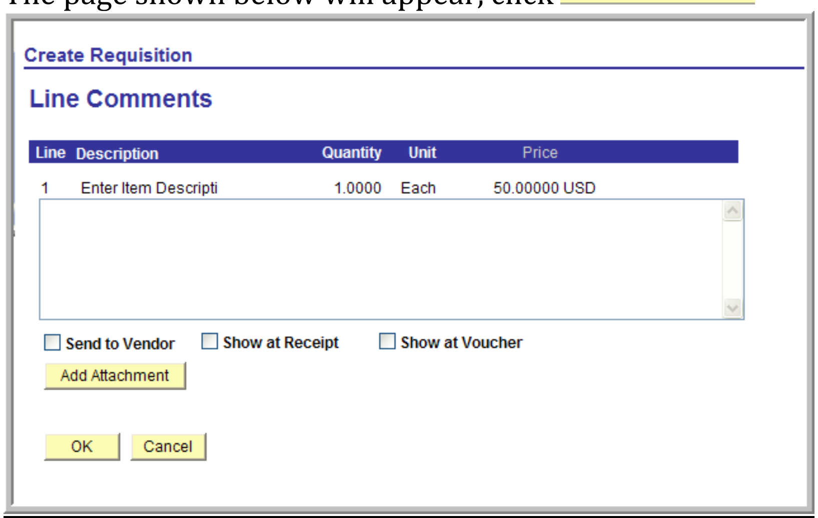


Step 9) (Optional) Attach file(s) that you believe might be useful to the approver when deciding whether to approve the req. (For example a quote from the vendor)

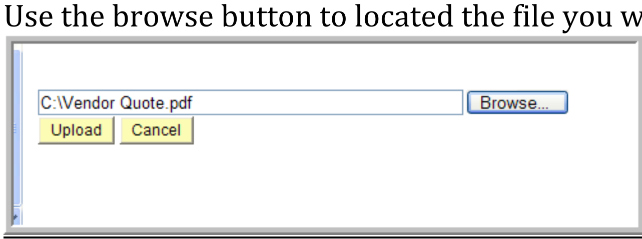
To attach a file, **c**lick the Icon



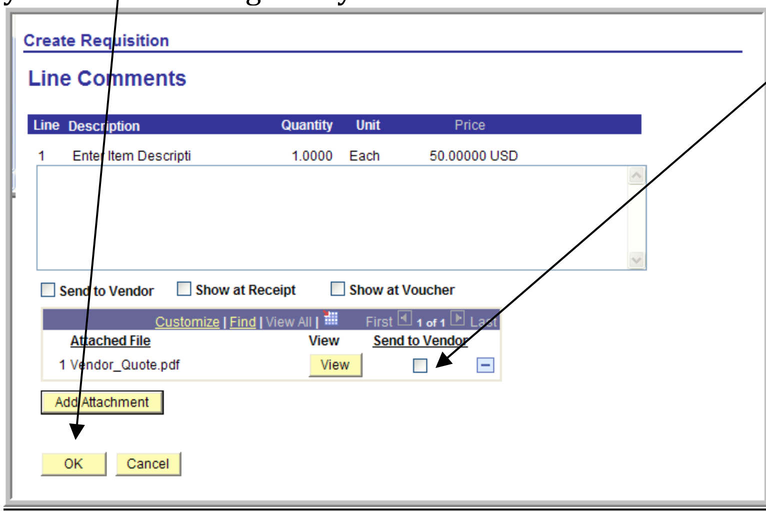
The page shown below will appear, click Add Attachment



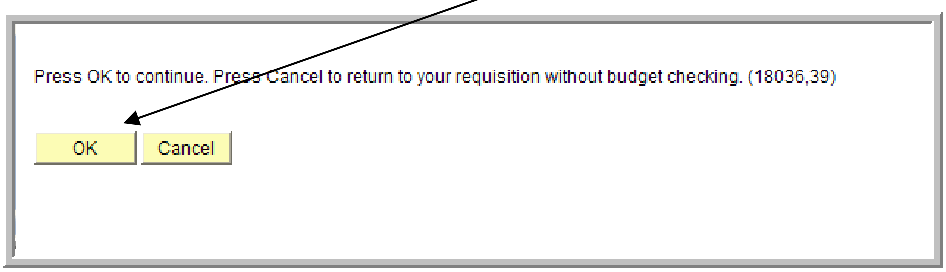
Use the browse button to located the file you want to attach, then click upload.



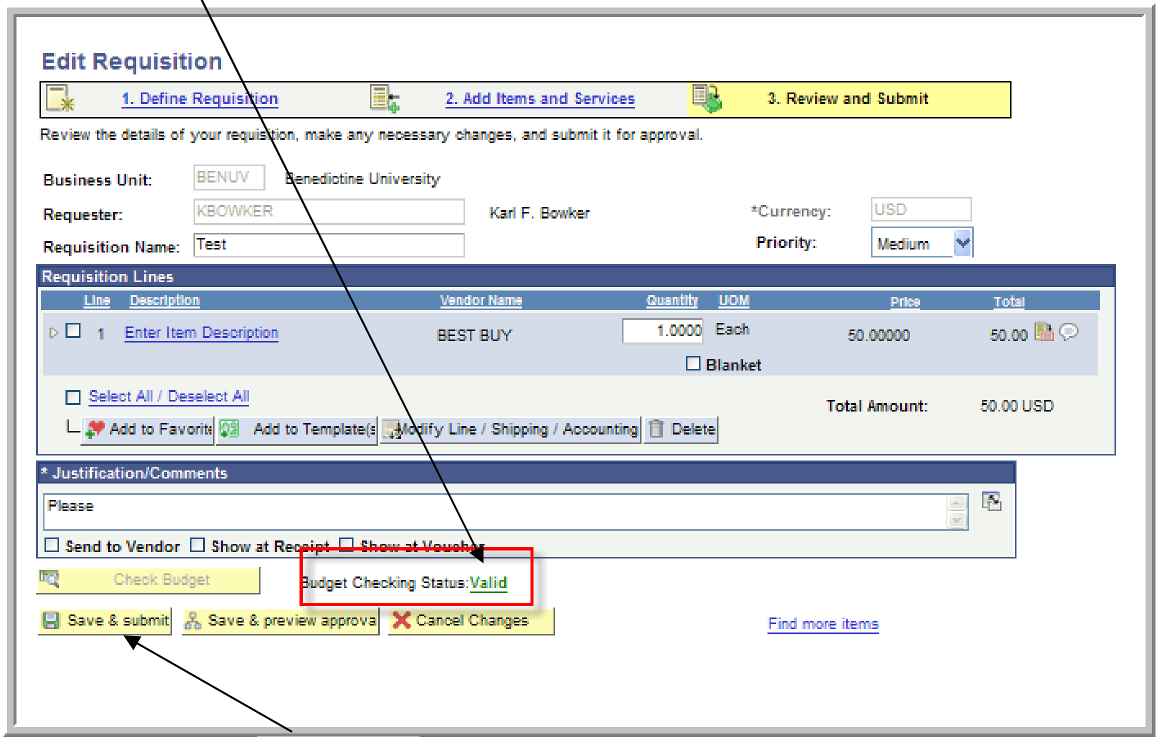
Click OK after you have attached the file(s). If you select the “Send to Vendor” check box, when the PO is dispatched to you, you will receive a copy of the files that you attached along with your PO PDF file.



Step 10) Budget Check the requisition by clicking the Check Budget button. The message below will appear, click the OK button



The process will take a few seconds to complete. Once it has finished you will be brought back to the “Review and Submit” tab. You should have a budget status or either “Valid” or “Error”.



Step 11) Click the Save & submit button. The page below will appear. The page will show all the necessary approval(s) that are required for the requisition.
This is the last step, so at this point you can either create a new requisition or sign out of PeopleSoft.