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.

Create Requisition			
1. Define Requisition 2. Ac	d Items and Services	3. Review	and Submit
Specify requisition name, requester, and other information that ap	plies to the entire requisition		
Business Unit: BERUV Benedictine University			
Requester: KBOWKER	Karl F. Bowker	*Currency:	USD
Requisition Name:	1	Priority:	Medium 🖌
▼ Line Defaults			
Collapse section ults specified below will be applied to requisition Vendor: Vendor Location:	lines when there are no pre	defined values for these fiel	lds.
Buyer: Category:	Q	Unit of Measure:	Q
Shipping Defaults Ship To: BOWKER, I Q Due Date: Image: Compare the second sec	<u>5</u>		
Accounting Defaults			
Location GL Unit Account Fund Dept	Program Class	PC Bus Unit Project	Affiliate
BOWKEI		Q	Q 🖃
Continue			

Step 4) Click the "<u>Special Item</u>" Link

Create Requisition
1. Define Requisition 2. Add Items and Services 3. Review and Submit
Add lines to the requisition, specifying the information necessary to procure each item or service.
Search: Q Search
Web Special Request
Select a Request Type
Special Item Request an item that is not listed in the Catalog.
Review and Submit

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

<u>Required Fields</u>

- 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?
 - 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.

Vendor ID: Name: Short Vendor Name: City: Country: Postal Code:	arch Eest Reset State:	
Enter Return to Defi	search criteria to find a vendor. ine Requisition	

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 <u>View All</u> to see a list of all 22 vendors. You can also sort the results by clicking any of the headers such as <u>Name</u>. 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 Ali	First 🗹 1	10 of 22 D	Last
	Vendor ID	Name	Location	Address	City	<u>State</u>	
1	000000022	BEST LIMOUSINE	Main	1463 S WILLIAMS ST	WESTMONT	IL	-
2	000000023	BEST LOCKING SYSTEM OF NORTHERN IL	Main	111 N Kemman Avenue	LaGrange	IL	B
3	000000024	BEST MESSENGER SERVICE	Main	671 Executive Drive	Willowbrook	IL	•
4	000000190	BEST BUY	Main	7601 Penn Avenue S	Richfield	MN	
5	000000942	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	h
8	0000004919	BEST WESTERN HIBISCUS MOTEL	Main	1313 SIMONTON STREET	KEY WEST	FL	R
9	0000005242	UNIVERSAL ASBESTOS REMOVAL, INC.	Main	20W201 101ST STREET	LEMONT	IL	B
10	0000005271	BEST WAY AUTO SALE INC.	Main	12231 S. CICERO AVE.	ALSIP	IL	R

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

tem Description: Enter Item Description Price: 50.00000 *Currency: USD Quantity: 1.0000 *Unit of Measure: EA Category: REGULAR_PO Q Due Date: Vendor ID: 0000000190 Q BEST BUY /endor Item ID: //endor Item Item Item Item Item Item Item Item	I lines to the requisition, specifying the		A A A A A A A A A A A A A A A A A A A	
Item Description Enter Item Description Price: 50.00000 *Currency: USD Quantity: 1.0000 *Unit of Measure: EA Q Category: REGULAR_PO Due Date: Image: Comparison of the state of	arch: eb Special Request cial Item	nformation necessary to procure each item	n or service.	Q Search
Mfg Item ID:	em Description: Enter Item Description: 50.00000 uantity: 1.0000 ategory: REGULAR_PO /endor ID: 0000000190 endor Item ID: 1 ifg ID: 1 ifg Item ID: 1	tion *Currency: *Unit of Measure: Due Date: BEST BUY	USD EA Q B	

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

Create Requisition	
Image: Interpretation Image:	<u>Ind Submit</u>
Add lines to the requisition, specifying the information necessary to procure each item or service. Search: Web Special Request Constraint Special Request	2 Search
Special item *Item Description: *Price: 50.00000 *Quantity: 1.0000 *Currency: USD *Category: REGULAR_PO 0000000190 BEST BUY Vendor ID: Optional Mfg ID: Optional Mfg Item Ip: Optional	
Additional Information Optional Second Show at Receipt Show at Voucher Add Item Cancel Add or Start New Type	

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

Create Requisition	
1. Define Requisition 2. Add Items and Services 3. Review and Subprit	
Review the details of your requisition, make any necessary changes, and submit it for approval.	
Business Unit: BENUV Benedictine University	Select check box for Blanket
Requester: KBOWKER Karl F. Bowker *Currency: USD	PO's only
Requisition Name: TEST Reg 1 Priority: Medium	
Requisition Lines	
Line Description Vendor Name	
C 1 Enter Item Description BEST BUY REQUIRED FIELDS	.00 🛤 🖓
Consolidate with other Regs Vendor	
Line:	
Status: Active *Ship To: BOWKER,KAP Modify Shipping Address	
Attention: Karl F. Bowker	
*Distribute Amt Y * SpeedChart:	
Accounting Lines	Customize Find View All I First 🗹 1 of 1 🕩 Last
Charitfields1 Details Asset information	Cherr DC Bur Light Droject Attiliste
1 Open BOWKEQ 100.0000 50.00 BENUV Q 1400	
Select All / Deselect All Total Amount: 50.00 USD	
Add to Pavonie 🖓 Add to remplately (Modify Line / Snipping / Accounting 📋 Deleter	
' Justification/Comments	
Send to Vendor 🗄 Show at Receipt 🖨 Show at Youcher	
Check Budget	
🔄 Save & submit 🐁 Save & preview approva 🗙 Cancel requisition	

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)

Croate Begu	icition							
	ISIUOII							
<u>1. Defin</u>	e Requisition	<u>≣</u> t; 2	2. Add Items and Servi	ices	3. Revie	w and Submit		
Review the details of	your requisition, make a	ny necessary ch	anges, and submit it for a	pproval.	$\overline{}$			
Business Unit:	BENUV Benedic	tine University						
Requester:	KBOWKER		Karl F. Bowker		*Currency:	USD		
Requisition Name:	Test Reg				Priority:	Medium	~	
Requisition Lines								
Line Descrip	tion	<u>v</u>	endor Name	Quantity UO	M	Price	Total	
D 1 Enter Ite	m Description	BE	EST BUY	1.0000 Ea	ch	50.00000	50.00 📑	\Diamond
				🗌 Blan	ket			
Select All / De	select All					Total Amount	50.00 USD	
🖵 🏞 Add to Favo	rites 🔯 Add to Templa	te(s) Modify I	Line / Shipping / Accountir	ng <u>Î</u> Delete			50.00 000	
 Justification/Comm 	ients							
Send to Vendor	Show at Receipt	Show at Vouc	cher					
Check Bud	iget							
	-							
Save & summir i	L Save & preview appr	nyals 💙 Can	cel requisition		Find more i	tomo		

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

The page shown below will appear, click Add Attachment

Description	Quantity Unit	Price	
Enter Item Descripti	1.0000 Each	50.00000 USD	
			~
			~
Send to Vendor 🔲 Sho	w at Receipt Show at	tVoucher	~
Send to Vendor	w at Receipt 🛛 Show at	t Voucher	~

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

	C:\Vendor Quote.pdf	Browse
	Upload Cancel	
•		

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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.

_ine Comments			
Line Description	Quantity Unit	Price	
Send to Vendor Show a	at Receipt 📃 Show at V	oucher	
Send to Vendor Show a Customize F Attached File	at Receipt Show at V ind View All H First View <u>Send t</u>	to Vendor	
Send to Vendor Show a Customize F <u>Attached File</u> 1 Vendor_Quote.pdf	at Receipt ☐ Show at V ind View All # First View <u>Send 1</u> View	to Vendor	

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

Press OK to continue. Prese Cancel to return to your requisition without budget checking. (18036,39)

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".

Edit Requisition			
1. Define Requisition	2. Add Items and Services	3. Review and	Submit
Review the details of your requisition, mak	e any necessary changes, and submit it for	approval.	
Business Unit: BENUV Benedic	stine University		
Requester: KBOWKER	Karl F. Bowker	*Currency:	USD
Requisition Name: Test		Priority:	Medium Y
Requisition Lines	Vendor Name	Quantity UOM	Price Total
D 1 Enter Item Description	BEST BUY	1.0000 Each 50.0	50.00 🖺 🖓
		Blanket	
Select All / Deselect All		Total A	mount: 50.00 USD
🖵 📌 Add to Favorite 💯 Add to Tem	plate(s Modify Line / Shipping / Accounting	1 Delete	
* Justification/Comments			
Please			
Send to Vendor Show at Receipt	Show at Vouchas		
Check Budget Budg	et Checking Status: <u>Valid</u>		
📙 Save & submit 🐰 Save & preview ap	prova 🗙 Cancel Changes	Find more items	5

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.

Requested For:	Karl F. Bowker	Number of Lines: 1
Requisition Name:	Test	Total Amount: 50.00 USD
Requisition ID:	000000040	Justification:
Business Unit:	BENUV	
Priority:	Medium	
Budget Status:	Valid	
Amount Approva	l Stage ling	
IS Approval Path Pending Charles R Approval up t	Williams 5 \$1,000	
Submit	Edit Requisition	Apply Approval Changes Check Budget