

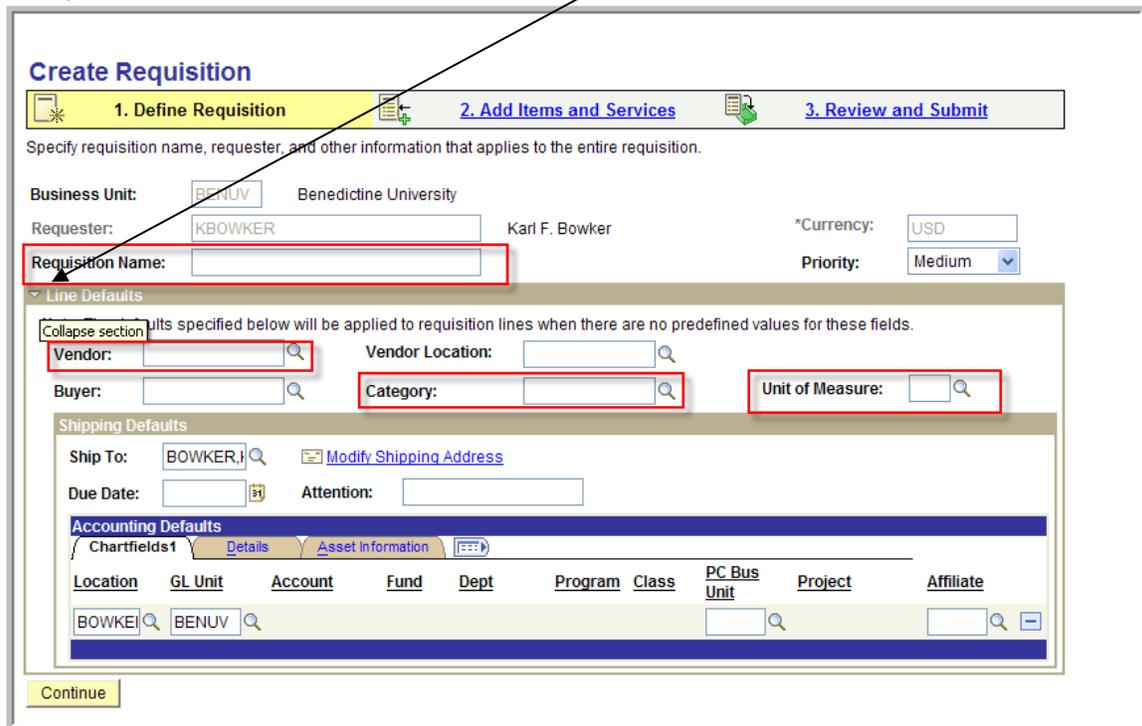
How to Enter a Requisition in ePro

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. Add Items and Services 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: BENUV Benedictine University
Requester: KBOWKER Karl F. Bowker *Currency: USD
Requisition Name: Priority: Medium

Line Defaults

Collapse section Defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: Vendor Location:
Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: BOWKER, [Modify Shipping Address](#)
Due Date: Attention:

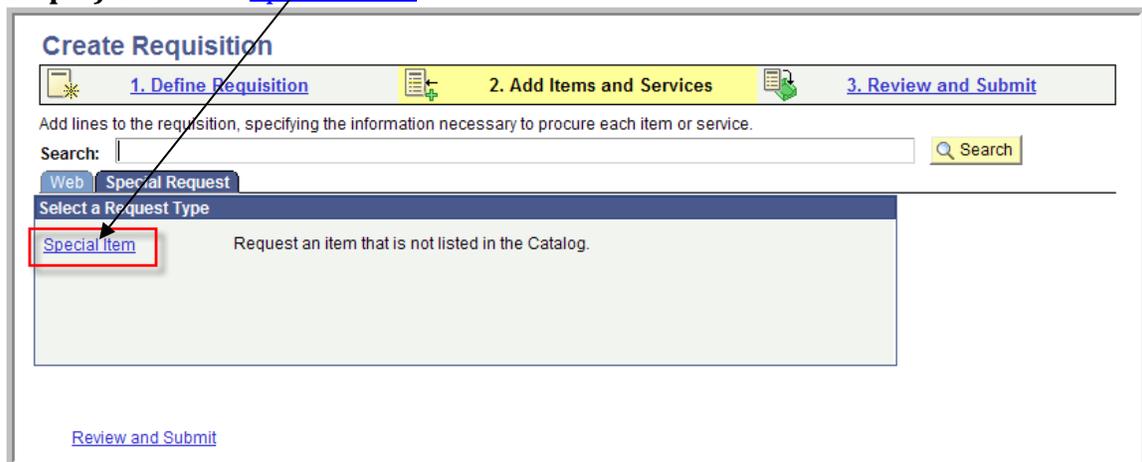
Accounting Defaults

Chartfields1 Details Asset Information

Location	GL Unit	Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Affiliate
BOWKE	BENUV	<input type="text"/>							

Continue

Step 4) Click the “**Special Item**” 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: **Search**

Web **Special Request**

Select a Request Type

Special Item Request an item that is not listed in the Catalog.

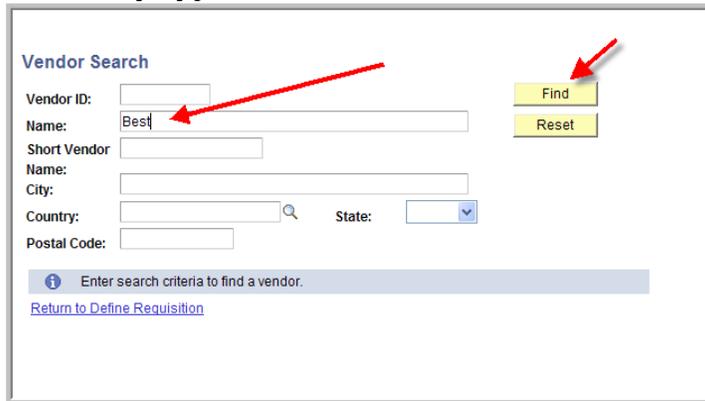
Review and Submit

Step 5) Complete the “Add Items and Services” page:

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.



Vendor Search

Vendor ID:

Name: **Find** **Reset**

Short Vendor:

Name:

City:

Country: State:

Postal Code:

[Enter search criteria to find a vendor.](#)

[Return to Define Requisition](#)

In this example there were 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 completed form to “New Vendor”. You will be notified when the vendor has been added.



Vendor ID	Name	Location	Address	City	State
000000022	BEST LIMOUSINE	Main	1463 S WILLIAMS ST	WESTMONT	IL
000000023	BEST LOCKING SYSTEM OF NORTHERN IL	Main	111 N Kemman Avenue	LaGrange	IL
000000024	BEST MESSENGER SERVICE	Main	671 Executive Drive	Willowbrook	IL
000000190	BEST BUY	Main	7801 Penn Avenue S	Richfield	MN
000000942	BEST ACCESS SYSTEMS	Main	22078 NETWORK PLACE	CHICAGO	IL
000003739	BEST WESTERN/CLEARWATER BEACH ECONO LODG	Main	625 S. GULFVIEW BLVD	CLEARWATER BEACH	FL
000004158	BEST PRACTICE RESOURCES, INC.	Main	26 W. 413 GRAND AV.	WHEATON	IL
000004919	BEST WESTERN HIBISCUS MOTEL	Main	1313 SIMONTON STREET	KEY WEST	FL
000005242	UNIVERSAL ASBESTOS REMOVAL, INC.	Main	20W201 101ST STREET	LEMONT	IL
000005271	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

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:

Web Special Request

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

*Vendor ID: BEST BUY

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

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

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:

Web Special Request

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

*Vendor ID: BEST BUY

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

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.

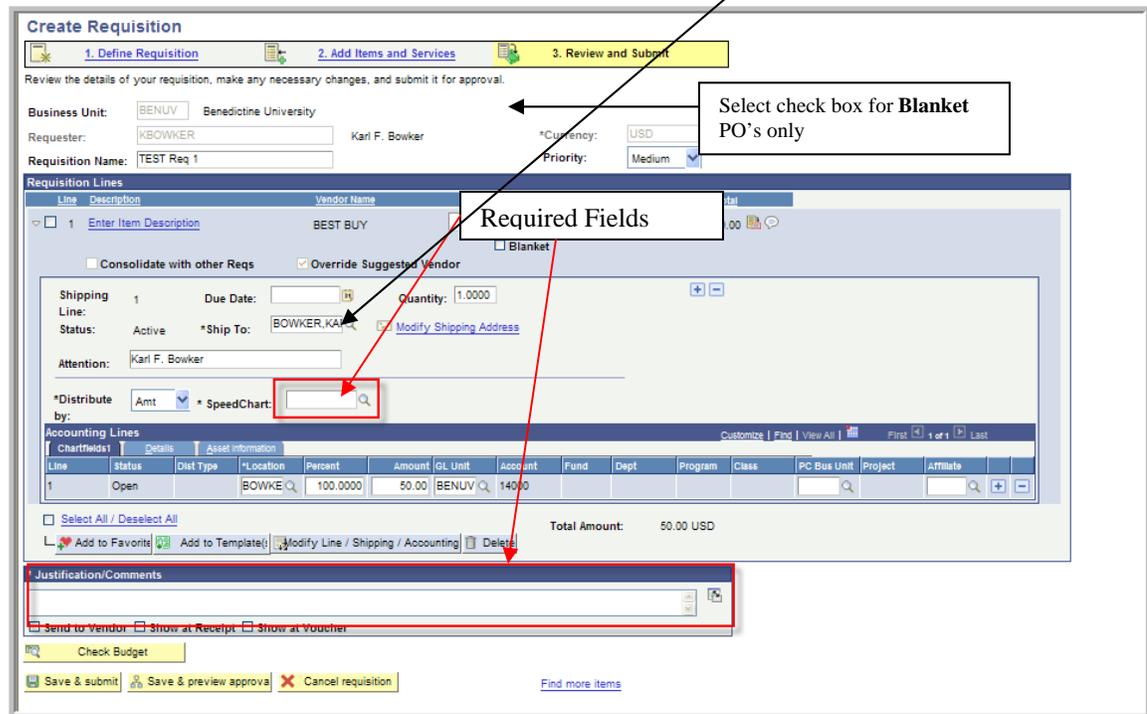
Step 8) Complete the “Review and submit” page

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.

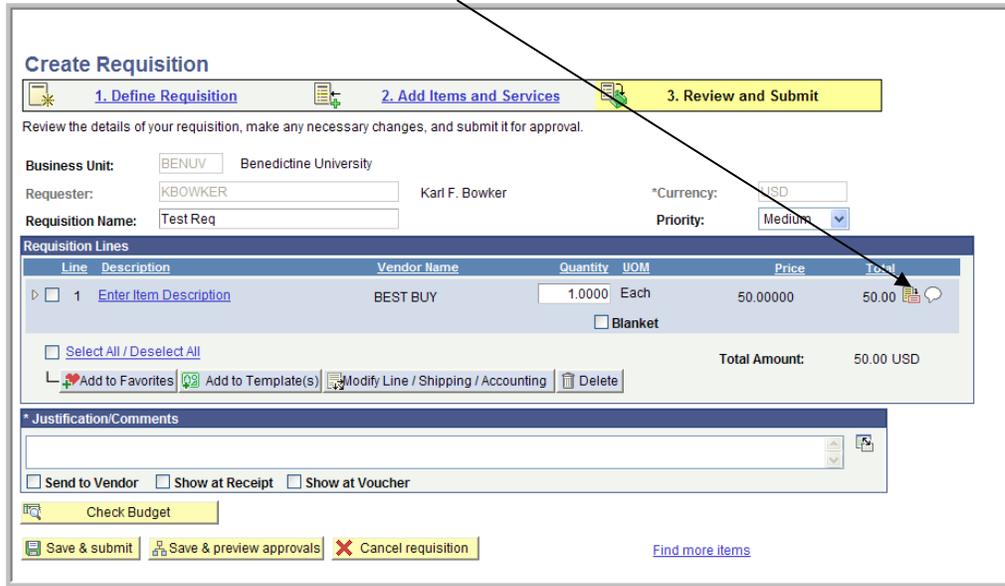
Optional Fields

- 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, click the  Icon



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: BENUV Benedictine University
Requester: KBOWKER Karl F. Bowker *Currency: USD
Requisition Name: Test Req Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Enter Item Description	BEST BUY	1.0000	Each	50.00000	50.00 

Select All / Deselect All
Total Amount: 50.00 USD

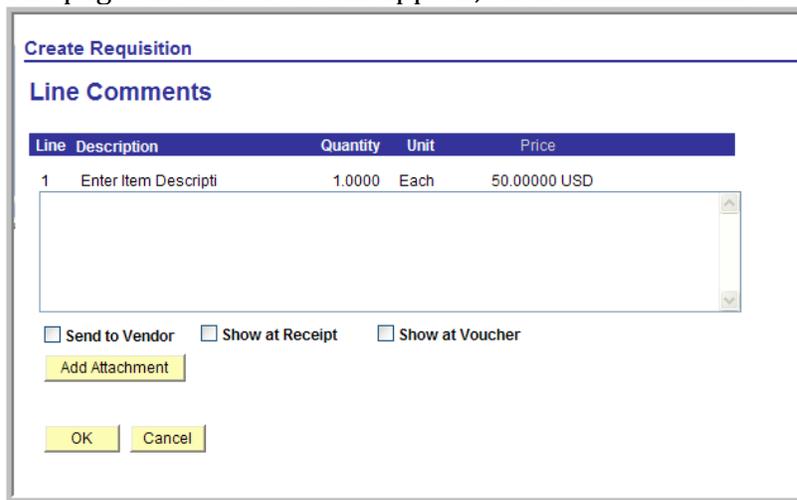
* Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Check Budget

Save & submit | Save & preview approvals | Cancel requisition | Find more items

The page shown below will appear, click **Add Attachment**



Create Requisition

Line Comments

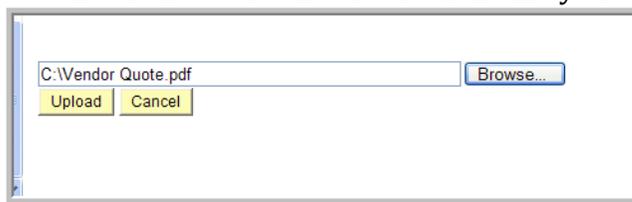
Line	Description	Quantity	Unit	Price
1	Enter Item Descripti	1.0000	Each	50.00000 USD

Send to Vendor Show at Receipt Show at Voucher

Add Attachment

OK Cancel

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



C:\Vendor Quote.pdf

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.

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	Enter Item Descripti	1.0000	Each	50.000000 USD

Send to Vendor Show at Receipt Show at Voucher

Customize | Find | View All | First | 1 of 1 | Last

Attached File	View	Send to Vendor
1 Vendor_Quote.pdf	View	<input type="checkbox"/>

[Add Attachment](#)

OK **Cancel**

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

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

OK **Cancel**

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.