

FAQ

eProcurement

Approval

Can an approver approve their own requisition?

Yes

What should I do if I add a reviewer?

Put the request on hold until they have reviewed it.

Will the requester be notified of the approver's decision?

Yes, via email

If an approver is going on vacation, can he reassign someone else to his/her worklist, and how is that done?

Yes. Go to People Tools > My system profiles.

After a request has been approved, how can an approver make a change to it?

The approver should contact Purchasing

What happens if an item I requested is put on hold?

It will stay on hold, and after a few days the approver will receive an email reminder, or you can contact the approver yourself.

Attachments

If I have a hard copy to send along with my requisition, how do I ensure that purchasing knows which requisition in the system matches up with the hard copy I gave them?

Write the requisition number on the hard copy. Or, place the req. number in the Requisition Title field before submitting the req.

Blanket POs

Where do Blanket POs get entered?

Under Special Request > Services.

Why do Blanket POs get entered under Special Request > Services?

Because a beginning and end date are needed.

Budget Check

Will a requisition still go through if it is denied after a budget check?

Yes

Manage Requisitions

Who can make changes to a req. once it has been submitted?

Both the requester and approver can make changes, until the req. has been approved. If it is already approved, purchasing will need to make the change.

When you make a change to a requisition and resubmit it, is a new requisition number generated, or does it go back into the workflow carrying the same requisition number?

The requisition will be resubmitted with the same requisition number.

Does the requester have a worklist?

The requestor can go to the 'manage requisition' page to see the status of their requisitions

PCards

When should Corporate Express and PCards be used instead of Special Request? Go to the material support site:

<http://www.cwru.edu/finadmin/matsupp/matsupp1.html>

Purchasing

If when filling out a request for a service the requestor puts in too many hours or too few hours, how does the requestor correct the problem?

Call purchasing

Receiving

Who receives the items?

The person who was designated to receive them.

What items get received?

You will record the receipt of line items of \$5,000 or more.

What happens if you don't receive an item?

You will eventually be notified to receive it.

Special Requests

What does the 'location' field on the Distribution Info page refer to?

This refers to the person who filling out the requisition.

Can I place orders for different people?

Yes, as long as they are in the system.

What is one time shipping information used for?

Off-campus addresses. Does not include Metro, VA, or UH. Can be a home address.

When filling out the special request form, are catalog number and description both required?

Catalog number is not required, but you must have some sort of description.

What if you don't know the price of an item you want to purchase?

Enter zero.

Do controlled substances go through special request?

Yes. They will require another level of approval.

If I enter the wrong buyer information, will the request still go to the correct buyer?

Yes

Speedtypes

Will new speedtypes be used on petty cash vouchers processed by cashiers?

It depends on whether or not they made that change to their form.

Workflow

How does an approver turn off the email notification feature?

Under 'my system profile' in the main menu