

Entering a Requisition for a Good

1. From the left-hand navigation, select eProcurement.
2. Select eProcurement Home Page.

The eProcurement Home Page appears.



3. Click Create Requisition.

The Requisition Summary page appears.



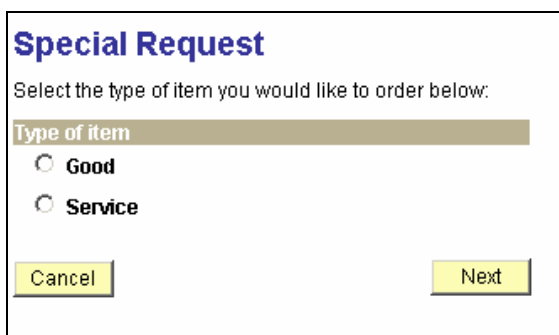
4. Enter a Requisition Title (optional).



This will help you identify your requisition. If you do not make an entry, the Requisition number will be used.

5. Click  **Special Request**.

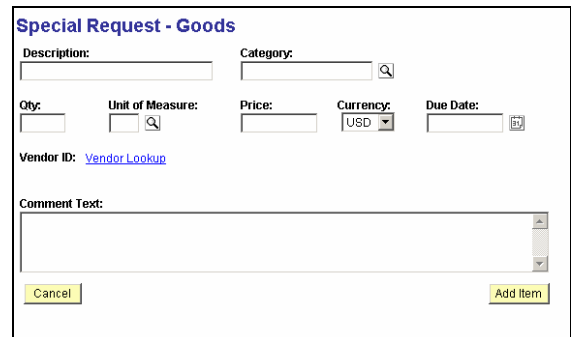
The Special Request page appears.



6. Click the **Good** radio button.

7. Click **Next**.


The Special Request – Goods page appears.



8. Enter a description of the item needed.



The description format must include: catalog#, descr, size (if applicable).

9. Click  for the Category field.

The Lookup Category page appears.

10. Select the appropriate item Category code.

11. Enter the quantity needed in the Qty field.

12. Enter the Unit of Measure for the item.

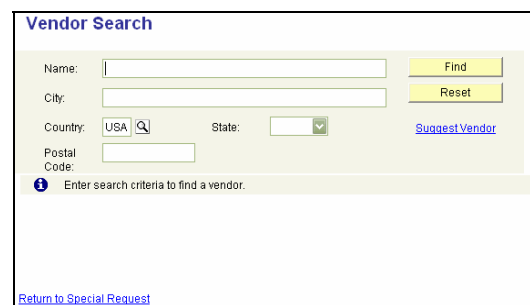
13. Enter the Price per unit of measure for the item.

14. Verify that USD is the Currency field.

15. Enter the date you need the item in the Due Date field.

16. Click the Vendor Lookup hyperlink.

The Vendor Search page appears.



17. Enter search criteria to locate the vendor in the vendor table:

◇ All or a portion of the vendor name


- ◇ City where the vendor is located
- ◇ State where the vendor is located
- ◇ All or a portion of the vendor zip code

18. Click .

The results that match the criteria appear in the Search Results list.

Your Search returned the list of items below:

Name	Location	Address	City	State
Beck Computer Centers	Remitting	30133 Euclid Ave	Wickliffe	OH
Beck-Lee	Remitting	PO Box 528	Stratford	CT
Beckley Candy Inc	Remitting	PO Box 64861	St Paul	MN
Beckman Brea	Remitting	PO Box 550	Brea	CA
Beckman Coulter Inc	Remitting	Dept CH 10164	Palatine	IL
Beckman Instruments Inc	Remitting	PO Box 70445	Chicago	IL
Beckson Ind Products	Remitting	PO Box 486	Outford	CT
Becc Manufacturing Co In	Remitting	23381 Parala Dr	Laguna Hills	CA
Becton Dickinson	Remitting	File No 5446	Los Angeles	CA
Becton Dickinson Labware	Remitting	1 Becton Dr	Franklin Lakes	NJ

19. Click  (Select Vendor) on the vendor line to use for this requisition item.

The Special Request – Goods page reappears with the selected Vendor.

Special Request - Goods

Description: LS9837, Test Tubes, 1/2-inch Category: LAB SUPPLIES

Qty: 200.000 Unit of Measure: EA Price: 1.95000 Currency: USD Due Date: 06/10/2004

Vendor ID: [Vendor Lookup](#)
Beckman Instruments Inc

Comment Text:

20. Enter any Comment text needed to appear on the requisition. This is information that may be helpful to the Purchasing group to process the requisition. You may also select this information to be printed on the purchase order to send to the vendor.

21. Click the Add Item button.

The Requisition Summary page appears.

Requisition for: Hansen, Dana

Requisition Title: Lab Supplies - test tubes

[Search Catalog](#) [Favorite Items](#) [Item Templates](#) [Special Request](#) [Service Request](#)

Requisition Summary Customize | View All | First 1 of 1 | Last

Description	Qty	Use PCard	Price	Unit
1 LS9837, Test Tubes, 1/2-inch	200	<input type="checkbox"/>	1.95 USD	Each

Justification / Summary Total Amt: 390.00 USD

Mark As Template

To add an item to this Requisition, click one of the options on the menu above.

[Procurement Home](#) [Manage Requisitions](#) [Create New Requisition](#)



Each line of your requisition must be updated with the shipping and cost distribution information.

22. Click the  (Shipping Info icon).

The Shipping Information page appears.

Shipping Information Override Suggested Vendor
 Consolidate with other Reqs

Line	Description	Quantity	Unit	Price	Lead Time
1	LS9837, Test Tubes, 1/2-inch	200.0000	Each	1.95000 USD	


Shipping Information Customize | Find | First 1 of 1 | Last

Ship To Location	Attention	Quantity	Due Date	Total
Hansen, Dana		200.0000	06/10/2004	390.00

[Return to Requisition Summary](#)

To change accounting / cost distribution information click the  icon on the line you wish to update.

23. If the Shipping location is a standard CASE location, select the Ship To location and skip to step 31.

24. If it is a one-time ship to location (non-CASE location), click the  (One Time Address icon).

The One Time Shipping Information page appears.


25. Enter the Country where the shipping address is located.

The remaining address lines become available in the format for that country.

26. Enter the correct, one-time shipping address.

27. Click .

The Shipping Information page appears.

28. If the requested items are going to multiple locations and or people, click the  button and repeat steps 26 through 32.

29. Click  (Cost Distribution Info icon).

The Distribution Information page appears.

Distribution Information


Line	Description	Quantity	Unit	Price
1	LS9837, Test Tubes, 1/2-inch	200.0000	Each	1.95000 USD

Details

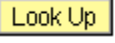
Line Status	Location	Ship Qty	Percent	Speed Type	Account	Event	Fund	Project	DeptID	Class	SL Base Amount
Open	SEW	5.0000	100.0000		433990						44.75

[Return to Shipping Information](#) [Return to Requisition Summary](#)

30. Select the Amt or Qty in the Distribute by field.

31. Click  to select the Speed Type.

The Look Up Speed Type page appears.

32. Type the beginning characters for your SpeedType and click .


The available SpeedTypes appear in the Search Results.

33. Click the link of the SpeedType you will use.

The Distribution Information page appears with the information from the selected Speed Type.

34. Enter the Account.

35. Enter the Event, if applicable.

36. For split funding on the requested items, click the  button, enter the Quantity or Amount, and repeat steps 36 – 40 for each additional distribution.

37. Click the Return to Shipping Information hyperlink

The Shipping Information page appears.


38. Click the Return to Requisition Summary hyperlink

The Requisition Summary page appears.

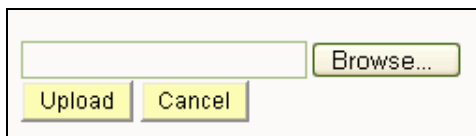
39. Click  (Comments icon).

The Comments page appears with any comments that you entered on the Special Request.

40. Turn on the send comment to vendor checkbox if you want the comments to be printed on the purchase order to be sent to the vendor.

41. Click  if you want to attach a document that further clarifies this request.


A page appears to select the document you want to send.



42. Click  to locate your document.

The Choose file dialog box appears.



43. Locate the file and click .

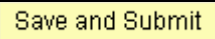
44. Click .

The Line Comments page appears with your attachment.

45. For additional requisition items, follow steps 8 through 55 as needed.

46. If your requisition is \$2,500 or higher, click Justification/Summary on the Requisition Summary page to enter a justification.

47. Once all items and details have been recorded for the requisition, click



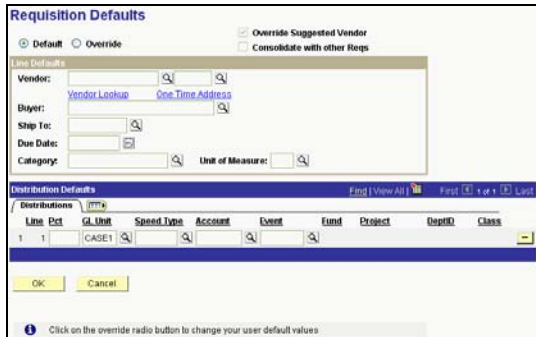


The requisition is saved and submitted to workflow approval. A message appears at the bottom of the Requisition Summary page with your Requisition number. You may want to note this number for future reference.

Using Edit Defaults

Instead of entering your vendor, ship-to and distribution information on each line, you can set all of this information up before you begin your requisition.

1. On the Requisition Summary page, click [Edit Defaults](#).



Line	Dist	GL Unit	Spend Type	Account	Event	Fund	Project	DeptID	Class
1	1	CA001							

2. Enter information in one or more of the fields that will apply to all of the lines on your requisition:

3. Click .

The Edit Defaults page closes and as you enter each line, the information entered there will be applied to each line of the requisition.



If you complete [Edit Defaults](#) after you have lines on your requisition, a message will appear asking if you want to apply the defaults to the lines already entered. Read the information carefully and click those that apply.