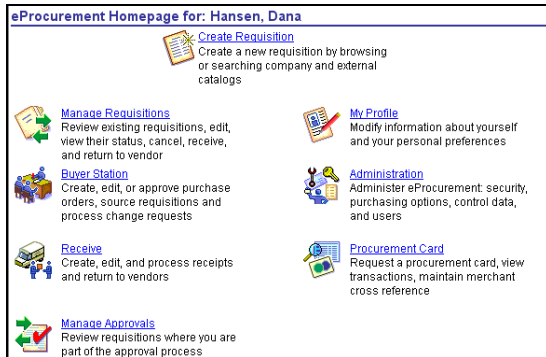


Entering a Requisition

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

The eProcurement Home Page appears.

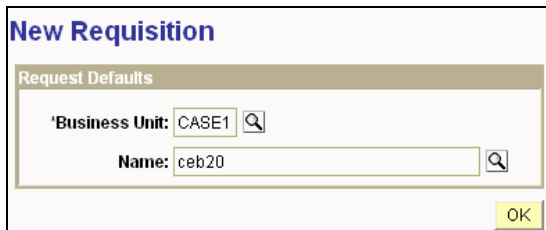


eProcurement Homepage for: Hansen, Dana

- Create Requisition**
Create a new requisition by browsing or searching company and external catalogs
- Manage Requisitions**
Review existing requisitions, edit, view their status, cancel, receive, and return to vendor
- Buyer Station**
Create, edit, or approve purchase orders, source requisitions and process change requests
- Receive**
Create, edit, and process receipts and return to vendors
- Manage Approvals**
Review requisitions where you are part of the approval process
- My Profile**
Modify information about yourself and your personal preferences
- Administration**
Administer eProcurement security, purchasing options, control data, and users
- Procurement Card**
Request a procurement card, view transactions, maintain merchant cross reference

3. Click Create Requisition.

The New Requisition page appears.



New Requisition

Request Defaults

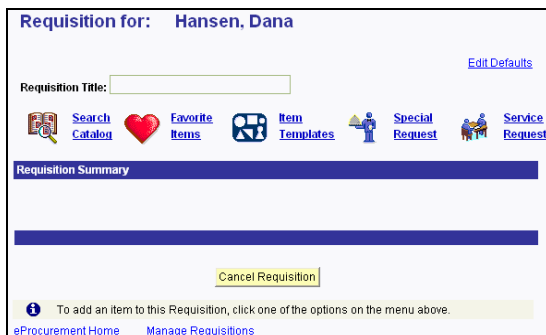
Business Unit: CASE1

Name: ceb20

OK

4. Verify or enter CASE1 as the Business Unit.
5. Verify or change the Name to correspond to the person requesting the item.
6. Click **OK**.

The Requisition Summary page appears.



Requisition for: Hansen, Dana

Requisition Title: [Edit Defaults](#)

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

Requisition Summary

[Cancel Requisition](#)

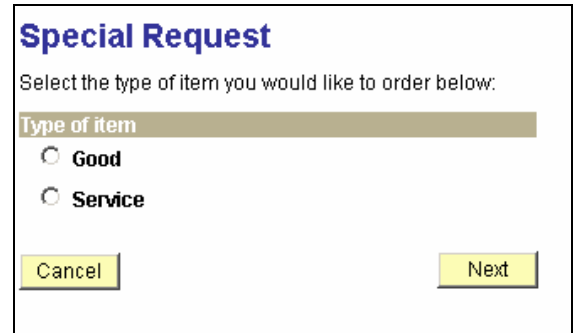
To add an item to this Requisition, click one of the options on the menu above.

[eProcurement Home](#) [Manage Requisitions](#)

7. Enter a Requisition Title.

8. Click  **Special Request**.

The Special Request page appears.



Special Request

Select the type of item you would like to order below:

Type of item

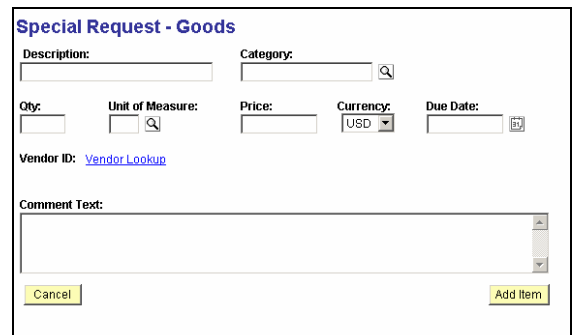
Good

Service

Cancel Next

9. Turn on the Good radio button.
10. Click **Next**.

The Special Request – Goods page appears.



Special Request - Goods

Description: Category: [Lookup](#)

Qty: Unit of Measure: [Lookup](#) Price: Currency: USD Due Date: [BY](#)

Vendor ID: [Vendor Lookup](#)

Comment Text:

Cancel Add Item

11. Enter a short description as the Requisition Title. This will help to identify your requisition.
12. Enter a description of the item needed.



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

13. Click [Lookup](#) for the Category field.

The Lookup Category page appears.

14. Select the appropriate item Category code.
15. Enter the quantity needed in the Qty field.
16. Enter the Unit of Measure for the item.
17. Enter the Price per unit of measure for the item.
18. Verify that USD is the Currency field.

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

20. Click the Vendor Lookup hyperlink.


The Vendor Search page appears.

21. 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

22. Click .

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

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

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

24. 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.


25. Click the Add Item button.

The Requisition Summary page appears.

26. Repeat steps 8 through 23 for all each items being requested.




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

27. Click the  (Shipping Info icon).

The Shipping Information page appears.

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

29. If it is a one-time ship to location (non-CASE location), click the .

The One Time Shipping Information page appears.

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

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


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

32. Click .

The Shipping Information page appears.

33. Enter or Verify the name of the person receiving the item in the Attention field, if other than the Requestor.

34. Verify the date that the requested item is needed in the Due Date field.

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

36. Click  (Cost Distribution Info icon).

The Distribution Information page appears.




Line	Description	Quantity	Unit	Price
1	#012345, Printer Paper, box	5.0000	Each	8.95000 USD

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

38. Click  to select the Speed Type.

The Look Up Speed Type page appears.

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


The available SpeedTypes appear in the Search Results.

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

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

41. Enter the Account, if applicable.

42. Enter the Event, if applicable.


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

44. Click the Return to Shipping Information hyperlink

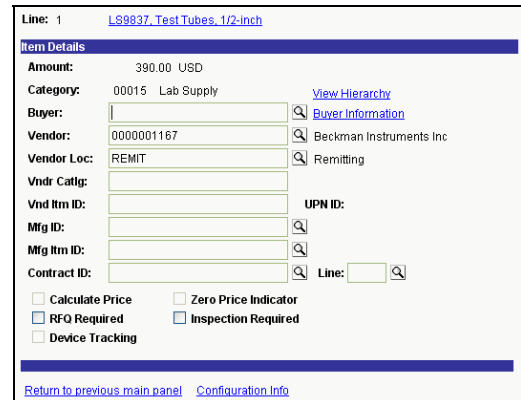
The Shipping Information page appears.

45. Click the Return to Requisition Summary hyperlink

The Requisition Summary page appears.

46. Click  (Line Details icon).

The Line Details page appears.




47. Enter or verify the ID for the Buyer.

48. Verify that the Vendor location information is correct.

49. Enter additional information as needed.


50. Click the Return to previous main panel hyperlink.

The Requisition Summary page appears.

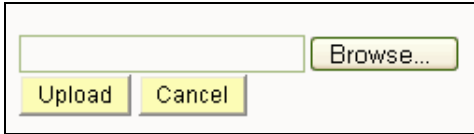
51. Click  (Comments icon).

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

52. 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.

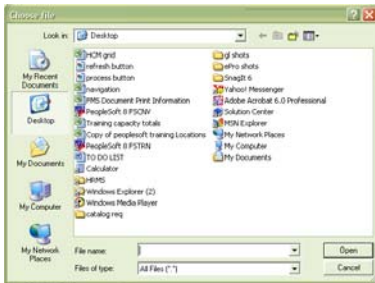
53. Click  if you want to attach a document that further clarifies this request.

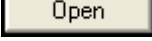
A page appears to select the document you want to send.




54. Click  to locate your document.

The Choose file dialog box appears.

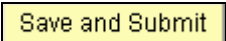


55. Locate the file and click .

56. Click .

The Line Comments page appears with your attachment.

57. 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.