Create Requisition

Specify Business Unit and Requester

To get started, sign into Epro, click on "eprocurement", then "create requisition"

*Business Unit: 84000   🔍   Middle Georgia College

*Requester: 🔍   user name here, then click "ok"

    OK

Create Requisition

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

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

Business Unit: 84000 Middle Georgia College

Requester: amdaniels Daniels,April M ***Currency:**

Requisition Name: ← can name the requisition whatever you want, so later you can find it...otherwise your requisition number will automatically go here. **Priority:**

▷ **Line Defaults**

Continue ← Can do one of two things here, either click "continue" and move to the next screen or click on the sideways triangle if you are entering in a large order. (next screen shot will show you what I am talking about).

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

Business Unit: 84000   Middle Georgia College

Requester: amdaniels   Daniels,April M   ***Currency:**

Requisition Name: If you do the drop down box.   **Priority:**

▽ Line Defaults

Note: The 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: MAIN   🔍   📧 Modify Shipping Address

Due Date: 📅   **Attention:**

Accounting Defaults

Chartfields1	Details	Asset Information	

Location	GL Unit	Account	Fund	Dept	Program	Class	Project	Bud
MAIN 🔍	84000 🔍	🔍	10500 🔍	0149100 🔍	16300 🔍	11000 🔍	🔍	2013

Continue

If you are going to have a big order and the information is going to be the same, you can do the drop down box and enter in the vendor name, category, and unit of measure. It will populate on each of your "add items" screen. Click "continue". (changing the account information here will not be of any help here).

if you save anything to your favorites later, it will show up here.

Create Requisition

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

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

| Catalog | Favorites | Templates | Forms | GaFirst Marketplace | **Special Request** |

Select a Request Type

Special Item	Request an item that is not listed in the Catalog.
Fixed Cost Service	Request a one-time service for a flat fee.
Variable Cost Service	Request a service for which the fee is based on the time worked.
Time and Materials	Request a service for which the fee is based on the time worked and materials used.

Review and Submit

If you are doing a normal (not a GA marketplace) requisition, then click on "Special request" and "special item".

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Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: [   ]

| Catalog | Favorites | Templates | Forms | GaFirst Marketplace | **Special Request** |

Special Item

*Item Description: [   ]

*Price: [   ]   ***Currency:** [USD]

*Quantity: [   ]   ***Unit of Measure:** [   ] 🔍

*Category: [   ] 🔍   **Due Date:** [   ] 📅

Vendor ID: [   ] 🔍   Suggest New Vendor

Vendor Item ID: [   ]

Mfg ID: [   ] 🔍

The highlighted have to be filled in.

Mfg Item ID: [   ]

Additional Information

[   ] ✔️

☐ **Send to Vendor**   ☐ **Show at Receipt**   ☐ **Show at Voucher**

[Add Item]   [Cancel]   [Add or Start New Type]

To find a vendor, click on the magnifying class.

Vendor Search

Vendor ID: _____

Name: _____

Short Vendor Name: aero____

City: _____

Country: _____ 🔍   **State:** ▢

Postal Code: _____

Find

Reset

Suggest Vendor

ℹ   Enter search criteria to find a vendor.

Return to Special Request

put just a few letters into the short vendor name and let it search for it. If the vendor isn't found, then click on suggest vendor.

Create Requisition

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Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | Favorites | Templates | Forms | GaFirst Marketplace | **Special Request**

Special Item

*Item Description: cleaning of airplane   put information here, as much as possible

*Price: 1600.00000   ***Currency:** USD

*Quantity: 1.0000   ***Unit of Measure:** DLR

*Category: 96200   **Due Date:**

category code, you will have to click on the magnifying class and look it up.

Vendor ID: 0000012795   AEROSPACE PRODUCTS INTERNATIONAL INC.   Suggest New Vendor

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

DNR- Eastman Aviation

may or may not have, not mandatory, but needed if ordering a part.

☐ **Send to Vendor**   ☐ **Show at Receipt**   ☐ **Show at Voucher**

[Add Item]   [Cancel]   [Add or Start New Type]

any additional information goes here.

click on "add item", if there are any errors, it will make you fix them. If all is good, the screen will go blank. If you are adding more lines, continue the process. When finished (after clicking on the "add item" and making the cells blank), click on the "3. review and submit" at the top right hand corner.

summary of what you have entered.

Help

Create Requisition

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

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

Business Unit: 84000   Middle Georgia College

Requester: amdaniels   Daniels,April M   *Currency:

Requisition Name: dummy PO   Priority:

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM
▷ ☐ 1	cleaning of airplane	AEROSPACE PRODUCTS INTERNATIONAL INC.	1.0000	Dollar

☐ Select All / Deselect All   **Total Amou**

└ ❤️ Add to favorites   📇 Modify Line / Shipping / Accounting   🗑 Delete

Justification/Comments

if it is going to be a repeated item, you can click it and add to your favorites.

☐ **Send to Vendor**   ☐   ow at Voucher

☐ **Save as Template**

💾 Save & submit   ⛁ Save & preview approvals   ❌ Cancel requisition   Find more items

Help

Create Requisition

| [ ] | **1. Define Requisition** | **and Services** | [ ] | **3. Review a** |

Review the details of your requisition, make any n___ mit it for approval.

Business Unit: 84000   Middle Geo___

Requester: amdaniels   April M   ***Currency:**

Requisition Name: dummy PO

> if you want to see what department or account it is going to, you can click on the sideways triangle, and it will do a drop down box. You can change the information here.

Priority:

Requisition Lines

	Line	Description	Vendor Name	Quantity	UOM
▽ ☐	1	cleaning of airplane	AEROSPACE PRODUCTS INTERNATIONAL INC.	1.0000	Dollar

☐ **Consolidate with other Reqs**   ☑ **Override Suggested Vendor**

Shipping Line: 1   **Due Date:** [ ] 📅   **Quantity:** 1.0000

Status: Active   ***Ship To:** MAIN 🔍   📧 Modify Shipping Address

Attention: Daniels,April M

*Distribute by: Qty   **SpeedChart:** [ ] 🔍

Accounting Lines

Customize | Find | View All | ▦   First

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Acco
1	Open		MAIN 🔍	1.0000	100.0000	1,600.00	84000 🔍	7511

☐ Select All / Deselect All   **Total Amou**

| ❤ Add to favorites | 📑 Modify Line / Shipping / Accounting | 🗑 Delete |

Justification/Comments

☐ **Send to Vendor**   ☐ **Show at Receipt**   ☐ **Show at Voucher**

☐ **Save as Template**

| 💾 Save & submit | 🖧 Save & preview approvals | ✖ Cancel requisition | Find more items

> once the information is fixed, click here to take you to the approval screen.

Create Requisition

	1. Define Requisition		2. Add Items and Services		3. Review a

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

Business Unit: 84000   Middle Georgia College

Requester: amdaniels   Daniels,April M   *Currency:

Requisition Name: dummy PO   Priority:

Requisition Lines

Line	Description			Quantity	UOM
▽ ☐ 1	cleaning of airplane	UCTS C.		1.0000	Dollar

☐ **Consolidate with other Reqs**   ted Vendor

Shipping Line: 1   **Due Date:**   antity: 1.0000

Status: Active   *Ship To: MA   dify Shipping Address

Attention: Daniels,April M

*Distribute by: Qty   **SpeedChart:**

if you have a lot of lines and want to change the account and department information at one time. Click on "modify line" (have to check the box(es) beside each line you want to modify.)

Accounting Lines   Customize | Find | View All | ▦   First

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Acco
1	Open		MAIN	1.0000	100.0000	1,600.00	84000	7511

☐ Select All / Deselect All   **Total Amou**

└ ❤ Add to favorites	📑 Modify Line / Shipping / Accounting	🗑 Delete

Justification/Comments

☐ **Send to Vendor**   ☐ **Show at Receipt**   ☐ **Show at Voucher**

☐ **Save as Template**

💾 Save & submit	🖧 Save & preview approvals	✖ Cancel requisition	Find more items

Create Requisition

Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID:	🔍	Vendor Location:		🔍
Buyer:	🔍	Category:		🔍

Shipping Information

Ship To:	🔍	🖃 Modify Shipping Address

Due Date:	📅	**Attention:**		**SpeedChart**	🔍

Accounting Information   Customize | Find | View All | 🏢

| Chartfields1 | Details | Asset Information | ⌦ |

Percent	GL Unit	Account	Fund	Dept	Program	Class	Project	Bud Ref
1	84000 🔍	🔍	🔍	🔍	🔍	🔍	🔍	

Load Values Fro

Apply		Cancel

add the information here, and click "apply"

Distribution Change Options

For the selected requisition lines, apply distribution changes to:

🔘 **All Distribution Lines**

Apply changes to all existing distribution lines.

⚪ **Matching Distribution Lines**

Apply changes to each existing distribution line by matching the distribution line numbers.

⚪ **Replace Distribution Lines**

Remove the existing distribution lines and replace with the distribution lines changes.

OK	Cancel

once you click "okay" here, it will take you back to the summary page. Click on "save and preview approvals".

Confirmation

Requested For:	Daniels,April M	**Number of Lines:**	1
Requisition Name:	dummy PO	**Total Amount:**	1,600.00 USD
Requisition ID:	0000405507		
Business Unit:	84000		
Priority:	Medium		
Budget Status:	Not Checked		

Department and Proj. Approval

▽ Line 1:Initiated
  cleaning of airplane   ➕ Start New Path

Department and Proj. Approver

➕➤ | **Not Routed**
Horton,Rebecca Marie
Dept-Manager and Dept-Appr | ➕

if you need to add an approver, click here and it will ask you to search for the person or if you already know their user name, enter it in. It will add that person to the approval flow.

Buyer Approval - NonCatalog

▽ dummy PO:Initiated   ➕ Start New Path

Buyer Approval

➕➤ | **Not Routed**
Multiple Approvers
Buyer Approval | ➕

this is the purchasing agent

Submit	Edit Requisition	Apply Approval Changes

View printable version   Manage Requisitions   Create New Requisition

right now, it shows "not routed", once you click on submit, it will change to "pending approval"