Work Instructions for using the Specials Requests functionality in eProcurement

All purchase requisitions can be entered using the ePro system. If the vendor that you are trying to place a requisition with is not listed on the Create Requisition Screen as a direct connect supplier the order can be placed using the Special Requisition feature.

*For specialty items that are not available through the supplier direct connect catalogs you can also use the Special Request feature

Navigate to eProcurement>Requisition

Favorites Main Menu → e	Procurement > R	equisition		
Create Requisition 👔				
Welcome Caramella,Cynthia		lome 🔒	My Preferences 🗱 Requisition Settings	Checkout
Request Options	Search Web	~		Search Advanced Search
Web	Web 👔			
WB MASON		Merchant	Description	
Grainger B + H Photo Fisher Scientific VWR International	WB.MASON	WB MASON	Office Supplies	
More	GRAINGER	Grainger		
Special Requests		B + H Photo	Choose to DISPLAY the nonsecure items.	
	Fisher Scientific	Fisher Scientific		
		VWR International		
	GovConnection	GovConnection	Toners, computer peripherals and accessories.	
	(mar)	Dell	Choose to DISPLAY the nonsecure items.	

Click on Requisition Settings to modify the header information of your requisition:

The following screen should appear

quisition Settings				
Business Unit	SYRUN	Syracuse University	Requisition Name	
Requeste	r CCARAMEL	Caramella,Cynthia	Priority	Medium V
*Currency	USD			
Default Options (?)				
ODefault	If you select this option, the defaults fields.	specified below will be applied to	requisition lines when there are no	predefined values for these
 Override 	If you select this option, the defaults	specified below will override any	predefined values for these fields,	only non-blank values are assigned.
Line Defaults 🛞				
Supplier	٩	Category	٩	
Supplier Location	Q	Unit of Measure	Q	
Buyer	Q			
Shipping Defaults				
Ship To	SK30210			
Due Date	Ħ	Attention		
Distribution Defaults				
SpeedCha	rt			

Chartf	fields1	Details	Asset Info	rmatio	n 💷								
Dist	Percent		Location		GL Unit	Fund	1	Dept	Program	Mycode	PC Bus Unit	Project	Activity
	1		SK30210	Q	SYRUN	Q	Q	Q	Q	Q	Q	Q	

OK Cancel

Scroll Right to see the entire Accounting defaults screen

Acco	ounting De	faul	lts				Pers	onalize Find	🖾 🔜	First 🕚 1 of 1	E Last
Cha	rtfields1	Det	ails Asset I	nformation	•						
	Mycode	P	C Bus Unit	Project	Activity	Source Type	Bud Ref	Work Order	Budget Class		
Q		Q	Q	Q	Q			Q	Q		+
<											>

Information entered in this screen applies to <u>all requisitions lines</u> unless changed at the line level at a later point in time.

Default Values:

Business Unit = Default of SYRUN not available for editing

Requester = Defaults from user entering the requisition, not available for editing

Currency = Defaults to USD not available for editing

Requisition Name =

Physical Plant requisitions typically require the job work order number to be entered into the Requisition Name field. Housing/Facilities typically use the building name. Other departments should utilize a requisition name that is meaningful to the department issuing the requisition

Priority = Defaults to Medium, if your requisition is urgent please change this priority flag to High

Default Options = Override should be selected as default do not change

Supplier = If the requested supplier is known please enter the supplier ID by using the search field. If the supplier is unknown or TBD please leave this field blank

Supplier Location = Supplier Business Processing settings, this field populates only when a supplier is selected and should be left at the default value. If a supplier has not been selected this field should be blank

Category = Use the search field to identify the appropriate product category for the items being purchased. This categorization is important as this field is used to by the system to determine which Buyer to route your requisition to

Unit of Measure = Utilize the search feature to select the appropriate UOM for the product that you are purchasing

Buyer = This field is not required and will default based on the category selected above

Ship to Location = This field will have a default value based on how the user was setup in ePro. This value can be changed if the default location is not the correct delivery location for this requisition.

Materials Distribution a code of SW16100 should be used

Physical Plant a code of SW10100 should be used

Due Date = This is the date when you would like to receive the materials, if no value is entered the field will default to date of entry.

Attention = Complete this field if the product is to be delivered to someone other than the person entering the requisition. Note please enter the employees last name first only 20 characters available in this field.

Speed Chart = This field is not used and should be left blank

Dist = Distribution line number defaults from the software, not available for editing

Percent = This is the percentage of the requisition that will be distributed to the chartstring that follows

Location = This value defaults to the requestor's physical location. Note if you are ordering product for another area other than your own, and the product is going to be delivered to Materials Distribution then update this field value to the area that you are ordering for

GL Unit = Default of SYRUN do not change

Fund = Determined by which Fund will be charged

Dept. = Enter the department number to be charged

Program = Enter the program number to be charged

MyCode = Optional per department, enter appropriate MyCode

PC Bus Unit = Only if a project chartstring is going to be charged enter SYRUN in this field, otherwise leave blank.

Project = Enter project number if applicable

Activity = Enter activity number if applicable

Source Type = This field is no longer used in requisitions and cannot be edited.

Bud Ref = Enter Bud Ref number if applicable

Work Order = Enter if applicable

Budget Class = Leave blank

Details Tab = There are no changes required on this tab leave as default

Asset Information Tab = There are no changes required on this tab leave as default

If multiple chartstrings will be charged for this requisition, select the "+" at the end of the first chartstring. A dialog box will appear asking you how many rows you would like to add. Enter the number of distribution lines that you would like to add and select OK (enter), see example below

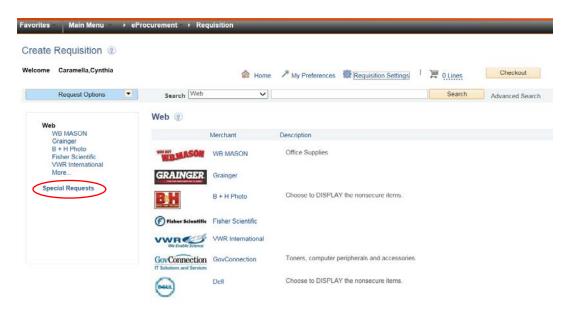
SYRACUSE		Welcome to: FN92RT
Favorites	syr.edu needs sor	me information X
Requisiti	Script Prompt: Enter number of ro	OK Cancel Name Test Requisition for Training
	2 *Currency	ion ID 0000097374
Def	ault Options 🕧	
) Default	If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
۲	Override	If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.
Line	Defaults 👔	
	Supplier	
	Supplier Location Buyer	
Shinn	ing Defaults	
	Ship To Due Date	
Distri	SpeedCha	art Q
	Accounting Defaults	Personalize Find 🖉 🔢 First 🕢 1-2 of 2 Last
	Chartfields1 Details	Bue Unit Drolent Activity Source Type Bud Work Order Budget Clees
	Q	

initian Cattin														
isition Setting														
Bu	isiness Unit					S	yracu	se Univers	ity		Requi	sition Name	est Requisition fo	r Training
	Requeste	MMYANDON				Y	andor	n,Melissa M	4			Priority M	edium 🗸	
	*Currency	USD												
Default Option	15 🕐 👘													
ODefault		If you select thi fields.	s opti	on, the de	faults	s specif	ied be	low will be	applied to	requis	sition lines whe	en there are no p	redefined values	for these
Override		If you select thi	s opti	on, the de	faults	s specif	ied be	alow will ov	erride any	predef	fined values fo	r these fields,only	y non-blank value	es are assigned.
ine Defaults 👔														
ine Deraults ())													
	Supplier	M213323001		Q				Cate	gory 302	01706	;	٩		
Supplie	r Location	000001		Q			U	nit of Mea	sure EA		Q			
	Buyer			Q										
hipping Defaults														
	Ship To	SW16100		Q										
	Due Date			1				Atte	ntion Joe	e Carfi				
		111102010						7144						
istribution Defa	SpeedCha	d	Q											
	-		4								ersonalize F			-70 D L
Accounting	-	Asset Infor	natio	n III)						P	ersonalize F	ing Go 🖼	First I 1-2	of 2 🛞 Last
Chartfields	ant	Location		GL Unit		Fund	C	Dept	Program		Mycode	PC Bus Unit	Project	Activity
		SW16100	Q	SYRUN	Q	11	Q	31007 🔍	00001	Q	Q	Q	Q	
	75.0000			OV/DUN		11	0	31012 Q	00001	0	Q			
	75.0000 25.0000	SW16100	0	SYRUN	1		~							

The new distribution lines will appear and should be completed using the same method as identified above. Note: The total Percent of all distribution lines must equal 100%.

Select OK, you will be returned to the main screen.

From the main screen you will select Special Requests from the left hand menu.



The following screen will appear.

e Caramella,Cynthia		lome Home	* My Preferences	Requisition Settings	<u>اب</u> م	Lines	Checkout
Request Options	Search All	~			4	Search	Advanced Search
Veb WB MASON Grainger B + H Photo Fisher Scientific VWR International	Special Requests (Enter information about the Item Details "Item Description		tem you would like to a	rder:			
More	*Price			*Cui	rrency	USD	1
pecial Requests	*Quantity			"Unit of Me	asure		Q
	*Category		Q	Du	ue Date		11
	Supplier						
	Supplier ID		a				
	Supplier Name		(a)			Suggest New	/ Supplier
	Supplier Item ID						
	Manufacturer						
	Mfg ID		Q				

Show at Receipt	Show at Voucher	
A notification will be sent to a buyer	r regarding this new item request.	
	· · ·	

Add to Cart

* All fields that are marked with an "*" are required.

*Item Description = Description of good or service that you are ordering

*Price = Enter the price per unit for the good or service that you are ordering, if the specific price is not known then enter a value of .01. If the chartstring being charged has a project tail then an estimated value for the product should be used, and a comment should be added that indicates that the price is an estimated value

Currency = Defaults to USD not available for editing

*Quantity = Enter the quantity of items to be purchased

*Unit of Measure = Utilize the search feature to select the appropriate UOM for the product that you are purchasing

* Category = Use the search field to identify the appropriate product category for the items being purchased. This categorization is important as this field is used to by the system to determine which Buyer to route your requisition to

Due Date = This is the date when you would like to receive the materials, if no value is entered the field will default to date of entry.

Supplier ID = If the requested supplier number is known please enter the supplier ID by using the search field. If the supplier is unknown or TBD please leave this field blank.

Supplier Name = If the requested supplier name is known please select the search field and enter the supplier name.

SYRACUSE UNIVERSITY						
Favorites - Main Menu -	▶ eProcurement	 Requisitio 	n	_		
Supplier Search				\frown		
Supplier	ID		(Find		
Nan	ne			Reset		
Short Supplier Nan	ne					
Alternate Supp Nan	ne					
Ci	ty					
Count	ry	Q	State 🗸			
Postal Co	de					
Favorites Main Menu >	eProcurement + 1	Requisition				
			Find a	1		
Supplier ID Name Ab	le-Smith		Find			
Short Supplier Name				J		
Alternate Supp Name						
City						
Country	٩	State	\sim			
Postal Code				_		
Search Results			Personalize Find View	AJI 🖾 🔣	First 🕚 1	l of 1 🛞 Las
Supplier ID Supplier Na	ime Default Location	Default Location Description	Address	City	State	
1 M213323001 Able-Smith	Tent 000001	Upgrade	Party Rental Enterprises	Cicero	NY	
OK Cancel						

Select the correct vendor by selecting the Supplier ID number

This will bring you back to the main screen

STRACUSE UNIVERSITY	Welcome to: FN92RT
Favorites Main Menu > eP	rocurement > Requisition
Create Requisition ② Welcome Yandon, Melissa M	
Request Options	Search All Advanced Search Advanced Search
Web WB MASON Grainger Apple B + H Photo Fisher Scientific More Special Requests	Special Requests Image: Constraint of the non-catalog item you would like to order: Item Details *Item Description Porta Potty Rental *Price 1000 *Currency USD *Quantity 4 *Unit of Measure EA *Category 30201708 0 Due Date 11/15/2016 Image: Constraint of the constra
	Supplier Item ID Manufacturer Mfg ID Manufacturer Mfg Item ID Additional Information Estimated price entered, please verify with vendor prior to placing the order Estimated price entered, please verify with vendor prior to placing the order Send to Supplier Show at Receipt Show at Voucher Request New Item A notification will be sent to a buyer regarding this new item request.

Supplier Item ID = Supplier part number if known

Mfg. ID = This field can be left blank

Manufacturer = This field populates automatically if a Mfg. ID is selected, this field can be left blank

Mfg. Item ID = This field would indicate the manufactures part number, this field can be left blank

Additional Information = This is additional notes or information pertaining to the specific line item

Select the Send to Supplier check box to display the information to the vendor on the Purchase Order. Recommend leaving the Show at Receipt, and Show at Voucher check boxes unchecked

Select the Add to Cart button at the bottom of the screen

You may receive a message like the following if there is a split distribution

MYSLICE	Welcome to: FN92RT	
Favorites Main Menu → eP	curement ->> Requisition	
Welcome Yandon,Melissa M	A Home My Preferences Requisition Settings I DLines Checkout Checkout	
Request Options	Search All Y Advanced Search Advanced Search	
Web WB MASON Grainger Apple B + H Photo Fisher Scientific	Special Requests @ Enter information about the non-catalog item you would like to order: Item Details "Item Description Porta Potty Rental	
More	*Price 1000 *Currency USD	
Special Requests	*Quantity Message *Category 30201708	
	Supplier ID M21332300 Supplier ID M21332300 Supplier Name Able-Smith Yes No	
	Manufacturer Mfg ID Q Manufacturer Mfg Item ID	
	Additional Information Estimated price entered, please verify with vendor prior to placing the order Id Send to Supplier Show at Receipt Request New Item Request New Item A notification will be sent to a buyer regarding this new item request.	
	Add to Cart	

Select Yes to continue

The following screen should appear

STRACUSE UNIVERSITY MYSLICE	Welcome to: FN92RT
Favorites Main Menu > ePr	ocurement Requisition
Create Requisition (2)	
Welcome Yandon, Melissa M	
Request Options	Search All V Advanced Search Advanced Search
Web WB MASON Grainger Apple	Special Requests ③ Enter information about the non-catalog item you would like to order:
B + H Photo Fisher Scientific More	Item Details *Item Description
Special Requests	*Price USD *Quantity EA Q. 10/2020/17/28 0 Due Date 11//5/2016 10
	*Category 30201708 Q Due Date 11/15/2016 (8)
	Supplier ID M213323001 Q Supplier Name Able-Smith Tent Q, Able-Smith Tent Suggest New Supplier
	Supplier Item ID
	Manufacturer Mfg ID Manufacturer Mfg Item ID
	Additional Information
	ja.€
	Send to Supplier Show at Receipt Show at Voucher
	Request New Item A notification will be sent to a buyer regarding this new item request. Add to Cart Anotification will be sent to a buyer regarding this new item request.

If your shopping cart does not appear automatically then select the shopping cart icon on the top right of the screen.

svracuse university MYSLICE	Welcome to: FN92RT	H All v Sea	ome Worklist Add to Favorites Sign o roh
Favorites Main Menu → ePr Create Requisition ② Welcome Yandon,Melissa M	ocurement - › Requisition @ Home <i>/</i> <u>My Preferences</u> @ Requisition Settings	/	Print New Window Help Personalize Pay
Request Options • Web Web MASON Grainger Apple B + H Poto F + H Poto More Special Requests	Search Advanced Search Special Requests Enter information about the non-catalog item you would like to order: Item Description "Item Description "Price "Quantity "Supplier Supplier Item D Able-Smith Tent Supplier Item D Manufacturer Mig ID Manufacturer		Ports Potty Cleaning Serv 4 EA Total Lines Total Amount (USD) 4400.00 Close Checkout
	Additional Information Additional Information Send to Supplier Show at Receipt Show at Voucher Request New Item Request New Item Additional Information will be sent to a buyer regarding this new item request.		

You will now repeat the previous steps to add additional item(s)

After all desired items are added to the cart, click on the Check Out button at the top of the screen

syracuse university MYSLICE	Welcome to: FN92RT	Home All v Search	: Worklist Add to Fa	vorites Sign
Favorites Main Menu → ePr	ocurement > Requisition			
Create Requisition (2)			rint New Window Help Pe	
Welcome Yandon,Melissa M	Home My Preferences Requisition Settings I Z Low Checkout		Shopping Cart Description Porta Potty Rental	Qty UOM 4 EA
Request Options	Search All V Advanced Search		Porta Potty Cleaning Serv	4 EA
Web WB MASON Grainger	Special Requests @ Enter information about the non-catalog item you would like to order:			
Apple B + H Photo Fisher Scientific More	Nem Details *Item Description			
Special Requests				
	*Category 30201706 Q Due Date 11/15/2018 B		Total Lines Total Amount (USD)	2 4400.00
	Supplier ID M213323001 Q		Close Checkout	
	Supplier Name Able-Smith Tent Q Able-Smith Tent Suggest New Supplier			
	Supplier Item ID			
	Manufacturer			
	Mfg ID			
	Manufacturer			
	Mfg Item ID			
	Additional Information			
	□ Send to Supplier □ Show at Receipt □ Show at Voucher			
	Request New Item A notification will be sent to a buyer regarding this new item request.			
	Add to Cart			

The following screen will appear

SYRACUSE U MYS	LICE	Welcome to: FN92RT								
Favorites	Main Menu → ePro	ocurement + Requisitio	n							
Check	kout - Review and Sub	mit								
	he item information and submit the	req for approval.		۲.	ly Preferences	Requisition Setting	15			
Requisit	tion Summary									
	Business Unit	SYRUN	Syracuse University	Requisit	on Name Test Requisit	ion for Training				
	Requester	MMYANDON	Yandon, Melissa M		Priority Medium 🗸	·				
	*Currency	USD								
Cart Sur	mmary: Total Amount 4,400.00 U	ISD								
Expar	nd lines to review shipping and acc	counting details			Add More Ite	ms				
Req	uisition Lines 👔									
~	Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
() ∈	1 🥵 Porta Potty Rental		Able-Smith Tent	4.0000	Each	1000.0000	4000.00	P	💬 Edit	Û
) ♦	2 Porta Potty Cleaning Services		Able-Smith Tent	4.0000	Each	100.0000	400.00		🖗 Edit	Û
	Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Toelete Selected	: E,	Mass Change			
						Total Amount	4,400.00 USD			
Shipping) Summary									
🗶 Edit f	or All Lines Ship To Location Address	SW16100 Hawkins Warehouse 1800 Jamesville Avenue Roo Syracuse, NY 13244	m 100							
	Attention To	Joe Carfi								
Requisit	tion Comments									
	ter requisition comments									
									<u>_</u>	

Select the triangle to the left of your line items to see all of the details associated with that line item.

syracuse university MYSLICE	Welcome to: FN92RT								
Favorites Main Menu → eP	rocurement → Requisitior	1			_				
Checkout - Review and Sul	bmit								
Review the item information and submit the	e req for approval.		≁ му	Preferences	Requisition Setting	5			
Requisition Summary									
Business Uni	t SYRUN	Syracuse University	Requisitio	n Name Test Requisition	on for Training				
Requeste	er MMYANDON	Yandon, Melissa M	1	Priority Medium 🗸]				
*Currency	USD								
Cart Summary: Total Amount 4,400.00	USD								
Expand lines to review shipping and ac				Add More Iter	ns				
Requisition Lines 👔									
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	s Delete
🔻 🗌 1 👷 Porta Potty Rental		Able-Smith Tent	4.0000	Each	1000.0000	4000.00	1	() Edit	Ũ
Shipping Line 1	*Ship To	SW16100		Quantity	4.0000			+	-
11 0	Address	Hawkins Warehouse		Price	1000.0000	Price Adjustm	ient		
		1600 Jamesville Avenue Room 100 Syracuse, NY 13244				Pegging Inqui	iry		
	Attention To	Joe Carfi				Pegging Work	kbench		
	Due Date	11/15/2016							
	Accounting Lines								
Porta Potty Cleaning Services		Able-Smith Tent	4.0000	Each	100.0000	400.00	P	🖗 Edit	Î
Select All / Deselect All	Select lines to:	Add to Favorites 🖓 Add	to Template(s)	Delete Selected	13.A	lass Change			
					Total Amount	4,400.00 USD			
Shipping Summary									
Edit for All Lines Ship To Location	SW16100								

The most common fields that are changed at the line level are the chartstring values, make any necessary changes Select the arrow next to Account Lines to see the details of the chartstring

RACUSE UMIVERSITY	Welcom	ne to: FN92F	ιT										
orites Main Menu	▶ eProcurement	→ Requis	ition			_							
R	ess Unit SYRUN equester MMYAND currency USD			yracuse University andon,Melissa M		Requisit		est Requisition for Train	ning				
art Summary: Total Amount 4									_				
Expand lines to review shippin	g and accounting deta	iils					🕈 А	dd More Items					
Requisition Lines (2) Line Description		Item ID	Su	pplier		Quantity	UOM	F	Price	Total	Detail	s Commen	ts Delete
🔻 🗌 1 👷 Porta Potty Re	ntal		Able	-Smith Tent		4.0000	Each	1000.00	00 40	00.00		Edit	Û
Shipping Line 1		*Ship Addr Attention Due D	Hawkir 1600 J Syracu To Joe Ca	ns Warehouse amesville Avenue Ro se, NY 13244 arfi	om 100			Quantity 4.00 Price 1000.000	00	Price Adjus Pegging In Pegging W	quiry		
	keesef	ounting Lines *Distribut	e By 🛛 Qty	~		SpeedChart		٩					
		ounting lines	artfields2	Details Details 2	Asset Info	ormation Ass	set Information		ion	AII (24 E	First	🕚 1-2 of 2 🤇	🕑 Last
	Line	status	Dist Type	*Location	Quantity	Pe	rcent	Merchandlee Amt	GL Unit	Entry E	vent		
	1	Open		SW16100	۹ 🗌	3.0000	75.0000	3,000.00	SYRUN	۹ 🗌		2	+ -
	2	Open		SW16100	۹ 🗌	1.0000	25.0000	1,000.00	SYRUN	۹ 🗆		2	+ -
Porta Potty Cle	aning		Able-	Smith Tent		4.0000	Each	100.000	00 4	00.00	P.	💬 Edit	Û
Select All / Deselect /	All S	elect lines to:	🔒 Add	to Favorites	🕮 Add to T	emplate(s)	🗍 Dek	ete Selected	📇 Mass C	hange			

To see the chartstrings select the Chartfields2 tab

syracuse university v MYSLICE	Velcome to: FN92RT											All 👻 S
Favorites Main Menu > eProcu	urement >> Requisition	_					_					
Business Unit S Requester M *Currency U	IMYANDON	Syracuse University Yandon,Melissa M		Requisition Nam Priorit	e Test Requisiti							
Cart Summary: Total Amount 4,400.00 USD)											
Expand lines to review shipping and account	nting details			÷	Add More Iter	ns						
Requisition Lines 👔												
Line Description	Item ID	Supplier Able-Smith Tent	Qua	4.0000 Each	DM	Price 1000.0000	Total 4000.00	Details	Commer	nts Delete		
Shipping Line 1	*Ship To Address Attention To Due Date	Hawkins Warehouse 1600 Jamesville Avenue R Syracuse, NY 13244 Joe Carfi	् oom 100 ज		Quantity Price	4.0000	Price Adjustme Pegging Inquin Pegging Workt					
	*Distribute By	Qty 🗸		SpeedChart	Q							
	Accounting Lines Chartfields1 Chartfield	Is2 Details Details 2	Asset Informatio	n Asset Inform	ation 2 <u>B</u> udg	et Information	Pe	sonalize	Find View	i Ali 🖉 📕	First 🕚 1-2	of 2 🛞 Last
	Fund Dept Progr	am Account	Mycode PC Bu	s Unit Project	Activity		Source Type	Budge Refere		Vork Order	Budget Class	
	11 Q 31007 Q 0000	1 🔍 560409 🔍	٩	۹ 🗌	۹ 🗌		Q	۹ 🗌	٩	٩	٩	+ -
	11 Q 31012 Q 0000	1 0 560409 0	٩	٩ 🗌	Q		Q	۹ 🗆	٩	٩	٩	+ -
Classifier Porta Potty Cleaning Services		Able-Smith Tent		4.0000 Each		100.0000	400.00	1	🖗 Edit	Û		
Select All / Deselect All	Select lines to:	Add to Favorites	🔛 Add to Templat	te(s) Ê	Delete Selected		Mass Change					
						Total Amount	4,400.00 USD					
Shipping Summary												

Make any required changes to chartstring values

Any attachments or additional line item notes are also entered at this screen by selecting the comment cloud on the line item

WYSLICE	Welcome to: FN92RT									All 👻
avorites Main Menu → ePro	curement → Requisitior			_			_			
Business Unit	SYRUN	Syracuse University	Requisit	ion Name Test	Requisition for Training					
Requester	MMYANDON	Yandon, Melissa M		Priority Medi	um 🗸					
*Currency	USD									
Cart Summary: Total Amount 4,400.00 U	D									
Expand lines to review shipping and acco	unting details			🕆 Add	More Items					
Requisition Lines 👔										
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details Com	ments Delete		
Tage Porta Potty Rental		Able-Smith Tent	4.0000	Each	1000.0000	4000.00	🖹 🌔 💬 🖬	Û		
Shipping Line 1	*Ship To	SW16100	L	Qu	antity 4.0000		\smile	+ -		
	Address	Hawkins Warehouse	100		Price 1000.0000	Price Adjustment				
		1600 Jamesville Avenue Ro Syracuse, NY 13244	om 100			Pegging Inquiry				
	Attention To	Joe Carfi				Pegging Workber	nch			
	Due Date	11/15/2018	3							
	Accounting Lines									
	*Distribute E	y Qty 🗸	SpeedCh	art	Q					
	Accounting Lines	,				Porre	onalize Find V	iow All I 🗇 I 🖡	Einst (4) 4.1	2 of 2 🕑 Last
	Chartfields1 Chartfields1	ds2 Details Details 2	Asset Information Ass	et Information 2	Budget Information		Number 1 mile 4			OL CAN
	Fund Dept Prog	ram Account N	lycode PC Bus Unit	Project	Activity	Source Type	Budget Reference	Work Order	Budget Class	
	11 🔍 31007 🔍 000	01 🔍 560409 🔍	Q	Q			۹۹		Q	+ -
	11 Q 31012 Q 000	01 Q 560409 Q	Q	Q		Q	۹ 💷 ۹	Q	٩	+ =
Cleaning Contract Porta Potty Cleaning Services		Able-Smith Tent	4.0000	Each	100.0000	400.00	🖺 🗇 Edit	Û		
Select All / Deselect All	Select lines to:	🙌 Add to Favorites	Add to Template(s)	Delete :	Selected 🖏	Mass Change				
					Total Amount	4,400.00 USD				
					rotar rinount	4,400.00 0.00				

The following screen will appear once you select the comment cloud

syracuse university MYSLICE	Welcome to: FN92RT							
Favorites Main Menu 🔹 🕨	eProcurement > Requisition							
Line Comment								
Business Unit SYRUN	Requisition Date 11/14/2016							
	Status Open							
Line 1								
Comments		Find	Firs	st 🕚	1 of 1	1 🕑 L	.ast	
	Entered On:							
1 < <estimated entered,="" plea<="" price="" td=""><td>se verify with vendor prior to placing the order>></td><td></td><td></td><td></td><td></td><td></td><td></td><td>2¢</td></estimated>	se verify with vendor prior to placing the order>>							2 ¢
Send to Supplier Add Attachments	Show at Receipt Show at Vouche	il.						
OK Cancel								

To add an attachment to the line, you must add a comment in the comment box if a comment was not previously added

After you have entered your comment select the Add Attachments button and browse to the appropriate file location

Welcome to: FN92RT			
eProcurement + Requisition			
Requisition Date 11/14/2018 Status Open			
Find	First 🕜 1 of 1 🛞 Last		
ase verify with vendor prior to placing the order>>			
		File Attachment	
		Upload Cancel	Browse
	eProcurement Requisition Date 11/14/2016 Status Open Find Entered On: case verify with vendor prior to placing the order>>	eProcurement Requisition Date 11/14/2018 Status Open Find First 1 of 1 Last Entered On: asse verify with vendor prior to placing the order>>	eProcurement Requisition Requisition Date 11/14/2018 Status Open Find First 1 of 1 Last Entered On: asse verify with vendor prior to placing the order>> Show at Receipt Show at Voucher File Attachment

After file is selected then click upload

rites Main Menu → ePro	curement + Requisition	
Comment		
Business Unit SYRUN	Requisition Date 11/14/2016	
	Status Open	
Line 1		
omments	Find First 🕚 1 of 1 🕑 L	ast
1 < <estimated entered,="" please="" price="" th="" veri<=""><th>Entered On: 11/14/2016 8:48:14AM fy with vendor prior to placing the order>></th><th>2</th></estimated>	Entered On: 11/14/2016 8:48:14AM fy with vendor prior to placing the order>>	2
1 < <estimated entered,="" please="" price="" td="" veri<=""><td>Entered On: 11/14/2016 8:48:14AM</td><td></td></estimated>	Entered On: 11/14/2016 8:48:14AM	
	Entered On: 11/14/2018 8:48:14AM fy with vendor prior to placing the order>>	
Send to Supplier	Entered On: 11/14/2016 8:48:14AM	
	Entered On: 11/14/2018 8:48:14AM fy with vendor prior to placing the order>>	
Send to Supplier Sh Add Attachments	Entered On: 11/14/2016 8:48:14AM fy with vendor prior to placing the order>> now at Receipt Show at Voucher	[7
Send to Supplier Sh Add Attachments	Entered On: 11/14/2018 8:48:14AM fy with vendor prior to placing the order>>	[7

Select the Send to Supplier checkbox, Show at Receipt, and Show at Voucher can be left unchecked

Once all of your attachments are added select OK, this will bring you back to the main screen, select the line triangle again to close line details

If you need to edit any previous comments or delete an entire line these features are available by selecting either the Edit hyperlink or the trash can icon to the right of the requisition lines

Requisition Lines 👔									
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Commen	ts Delete
I and Porta Potty Rental		Able-Smith Tent	4.0000	Each	1000.0000	4000.00		🖗 Edit	Ĩ
Porta Potty Cleaning Services		Able-Smith Tent	4.0000	Each	100.0000	400.00		🖗 Edit	Û
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Telete Selecter	a (5,0	lass Change			
					Total Amount	4,400.00 USD			

If all lines are okay then proceed to the next section

SYRACUSE UNIVERSITY MYSLICE	Welcome to: FN92R	т							
Favorites Main Menu > ePr	rocurement → Requisit	ion							
Requisition Lines 🕧									
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
🕨 🗌 1 🔐 Porta Potty Rental		Able-Smith Tent	4.0000	Each	1000.0000	4000.00	P	🦻 Edit	Û
Porta Potty Cleaning Services		Able-Smith Tent	4.0000	Each	100.0000	400.00		🖗 Edit	Û
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	î Delete Selected	i ion	lass Change			
					Total Amount	4,400.00 USD			
Shipping Summary									
🖉 Edit for All Lines Ship To Location Address Attention To	SW18100 Hawkins Warehouse 1800 Jamesville Avenue Ro Syracuse, NY 13244 Joe Carfi	om 100							
Requisition Comments									
Enter requisition comments									
								ূর	
Send to Supplier	Show at Receipt	Shown at Voucher							
Approval Justification									
Enter approval justification for this re	quisition								
							i.	2	
🛃 Save & submit 📳	Save for Later	Add More Items	රේ Preview Approvals						

Requisition Comments = Any comments related to the entire requisition should be entered here. If comments are added, please select the Send to Supplier checkbox

Approval Justification = Enter a justification for the requisition that will be reviewed by the approver, see below example

SYRACUSE UNIVERSITY	Welcome to: FN92R1	г							
Favorites Main Menu >	eProcurement > Requisiti	on							
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
🕨 🗌 1 🥵 Porta Potty Rental		Able-Smith Tent	4.0000	Each	1000.0000	4000.00	Ph.	🦻 Edit	Ũ
Porta Potty Cleaning	9	Able-Smith Tent	4.0000	Each	100.0000	400.00	Pa	🖗 Edit	Û
Select All / Deselect All	Select lines to:	🙀 Add to Favorites	Add to Template(s)	Tolete Selected	12,	Mass Change			
					Total Amount	4,400.00 USD			
Shipping Summary									
💆 Edit for All Lines Ship To Location Address		m 100							
Attention To	Joe Carfi								
Requisition Comments									
Enter requisition comments									
Porta Potties should be cleaned	l after each event.							<u>j</u>	
Send to Supplier	Show at Receipt	Shown at Voucher							
Enter approval justification for th	is reauisition								
	le Toilets that we use for our Footba	ll Games.						7	
	E	Budget Checking Status:N	ot Checked						
🜏 Save & submit	Save for Later	Add More Items	6ð Preview Approvals						

Save for Later = will store the requisition but not submit it for approval or processing, this button must be selected prior to previewing your approval routing

+ Add More Items = If you have determined that you need to add additional items to your requisition

Preview Approval = Will show you the approval routing for the requisition, see below for example

syracuse university	Welcome to: FN92RT		
Favorites Main	Menu > eProcurement > Requisition	_	
Preview Approvals	1		
Requested For	Yandon,Melissa M	Number of Lines	2
Requisition Name	Test Requisition for Training	Total Amount	4,400.00 USD
Requisition ID	0000097374		
Business Unit	SYRUN		
Status	Open		
Priority	Medium		
Budget Status	Not Checked		
Stage 1	NESS_UNIT=SYRUN, REQ_ID=0000097374:Initiated		
Path 1			
	nella, Cynthia se Dep: Approvens		
Return	Apply Approval Changes		

Click on return to return to the previous page

Save & submit = Select this button when you are ready to submit your requisition for approval and processing

The following screen will appear

Confirmation			
Your requisition has been subm	itted.		
Requested For	Yandon,Melissa M	Number of Lines	2
Requisition Name	Test Requisition for Training		4,400.00 USD
Requisition ID	0000097374	Approval Justification This requisition is for the	Portable Toilets that we u
Business Unit	SYRUN	for our Football Games.	
Status	Pending		
Priority	Medium		
Budget Status	Not Checked		
View printable version Stage 1	Edit This Requisition		
- BUSINESS	UNIT=SYRUN, REQ_ID=0000097374:Pending 🛨 N	tart ew ath	
Path 1 Pending	thia		

If you would like to view a printable version of the requisition, click the hyperlink, if your requisition has multiple chartstring lines then you may receive the following message

SYRACUSE UNIVERSITY	Welcome to: FN92RT		
Favorites Main Menu	eProcurement Requisition	_	
Confirmation			
Your requisition has been submi	tted.		
Requested For	Yandon,Melissa M	Number of Lines	2
Requisition Name	Test Requisition for Training	Total Amount	4,400.00 USD
Requisition ID	0000097374	Approval Justification	Portable Toilets that we use
Business Unit	SYRUN	for our Football Games.	Totable Totable Totable age
Status	Pending		
Priority	Medium		
Budget Status	Not Checked		Message
Miew printable version	🖉 Edit This Requisition		Do you want to print the requisition with distribution details ? (18036,11614)
Stage 1			Yes No
	UNIT=SYRUN, REQ_ID=0000097374:Pending (±)N P.	art ev sh	
Apply Approval Change	Manage Requisitions		

The printable view should appear

⊨)(⇒) <i> (</i> https://	//fn92rt.p	s. syr.edu /psc/	/FN92RT/vie	w/FILEDB_	o-≞¢	<i>e</i> EST Sup	port Page	Requisition	Requisition	(
ile Ed			Tools He								
Requisitio	Unit: SYRUN n: 0000097374 n Name: Test Re omments:	equisition for 1	Fraining	Requester: M Requested B Entered Date	y: Yandon,Melis	sa M	Curren	Pending Approval cy: USD tion Total: 4,400.00			
	es should be clea ition is for the Po		h event. that we use for ou	r Football Game	s.						
Line: 1	Item Descript	tion: Porta Po	ty Rental		Quantity: 4.00	00 U	OM: EA Price: 1	000.00 Line Total: 4,000.00 Line Status: Pendin			
Line Comm		lease verify wi	th vendor prior to pl	lacing the order>	>						
Ship Line: Attention: .			Ship To: SW16 Due Date: 11/1		H 1 S	ddrees: awkins Warehou 500 Jamesville A yracuse NY 1324 nited States	venue Room 100	Shipping Quantity: 4.0000 Shipping Total: 4,000.00	0		
Dist	Location	Qty	Amount	PCT	Fund	Dept	Program	Account			
1	SW16100	3.0000	3,000.00	75.00	11	31007	00001	560409			
Dist	Location	Qty	Amount	PCT	Fund	Dept	Program	Account			
2	SW16100	1.0000	1,000.00	25.00	11	31012	00001	560409			
Line: 2 Line Comm			tty Cleaning Service	es	Quantity: 4.00	00 U	OM: EA Price: 1	00.00 Line Total: 400.00 Line Status: Pendin	g		
Ship Line: Attention:			Ship To: SW16 Due Date: 11/1		- - 1	ddress: awkins Warehou 500 Jamesville A yracuse NY 1324 nited States	venue Room 100	Shipping Quantity: 4.0000 Shipping Total: 400.00	3		
	Location	Qty	Amount	PCT	Fund	Dept	Program	Account			
Dist					11	31007	00001	560409			
Dist 1	5W16100	3.0000	300.00	75.00							
	SW16100	3.0000 Qty	300.00 Amount	75.00 PCT	Fund	Dept	Program	Account			

Select File>Print to print your requisition

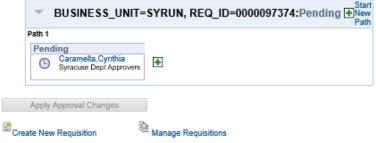
Close the window by clicking the small red x in the upper right-hand corner of the screen

You can edit the requisition until it is approved, once approved you cannot edit the requisition

If you did not print the requisition you may wish to record the requisition number at this time

To view your requisition, navigate to the Manage Requisition link within the eProcurement menu

File Edit View Fa	avorites Tools Help	
SYRACUSE UNIVERSITY MYSLICE	Welcome to: FN92RT	
Favorites Main Menu	eProcurement Procurement Procurement	_
Confirmation — Your requisition has been submi	Buyer Center Requisition Manage Requisitions My Profile	
Requested For	Yandon,Melissa M	Number of Lines 2
Requisition Name	Test Requisition for Training	Total Amount 4,400.00 USD
Requisition ID	0000097374	Approval Justification This requisition is for the Portable Toilets that we use
Business Unit	SYRUN	for our Football Games.
Status	Pending	
Priority	Medium	
Budget Status	Not Checked	
View printable version	🖉 Edit This Requisition	
Stage 1		



The following screen will appear

syracuse university MYSLICE	Welcome to: FN9	2RT				
Favorites Main Menu → e	Procurement 🔸 Mana	ge Requisitions	_			
Manage Requisitions						
Search Requisitions						
To locate requisitions, edit the criteria b	elow and click the Search but	ion.				
Business Unit SYRUN	C Req	uisition Name				Q
Requisition ID	٩,	Request State All but Complete	~	 Budget Sta 	itus	~
Date From 11/07/2016	21	Date To 11/14/2016	81			
Requester MMYANDON	٩	Entered By	Q	PC	DID	٩
Search Clear	Show Ac	Ivanced Search				
The Requester specified h	nas no Requisitions.					
Create New Requisition Re	eview Change Request	Review Change Tracking	Manage	Receipts	Requisition Report	

The suggested filters for this screen are as follows

Date From = Remove (leave blank)

Date To = Remove (leave blank)

Requester = Will default to your NetID, if you are looking for a requisition entered by another user use the find feature on the requester field to select a different user. Note you will only be able to view requisitions that you have chartstring authorization for

Select Search to see your results

SYRACUSE UNIVERSITY MYSLICE	Welcome t	o: FN92RT					
Favorites Main Menu > e	Procurement	Manage Requ	iisitions				
Manage Requisitions							
Search Requisitions							
To locate requisitions, edit the criteria b							
Business Unit SYRUN	0	Requisition N					Q
Requisition ID	Q		State All but Complete	~	Budget Sta	atus	~
Date From	21		te To	21			
Requester MMYANDON	٩,	Entere	ed By	0	P	O ID	Q
Search Clear		Show Advanced S	Search				
! The Requester specified h	as no Requisitions.						
	eview Change Requ	est F	Review Change Tracking	Manage F	Receipts	Requisition Report	
STRACUSE UNIVERSITY	Welcome to	o: FN92RT					
Favorites Main Menu → e	Procurement >	Manage Requ	isitions				
Manage Requisitions							
Search Requisitions							
To locate requisitions, edit the criteria b Business Unit SYRUN	elow and click the Se	earch button. Requisition N	ame				Q
Requisition ID	~	-	State All but Complete	~	Budget Sta	fue	~
Date From		-	e To	1	Dudger sta	105	*
Requester MMYANDON		Entere			PC	D	
Search Clear		Show Advanced S	earch				
Requisitions ②							
To view the lifespan and line items for a							
To edit or perform another action on a re				-I. O.			
	-		-				
Req ID Requisition Name 00000097374 Test Requisition for	BU		quest State Bud	get Total	0.00 USD [Select A	Action]	Go
Req ID Requisition Name	BU Tr SYRUN	Date Re	quest State Bud nding Not	get Total Chk'd 4,40	0.00 USD [Select A		Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts

Select the triangle next to your requisition to see the requisition status.

Requisition Report

RACUSE UNIVERSITY Welcome to: FN92RT MYSLICE Main Menu Manage Requisitions Search Requisitions To locate requisitions, edit the criteria below and click the Search button.

Business Unit SYRUN Q Q Requisition Name Requisition ID Q Request State All but Complete $\mathbf{\sim}$ Budget Status ~ Date From 21 Date To 81 Entered By Requester MMYANDON Q Q PO ID Q Clear Search Show Advanced Search Requisitions (?) To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

R	Requisition Name	BU	Date Request St	tate Budget	Tot				
374 T	est Requisition for Tr	SYRUN	11/14/2016 Pending	Not Chi	ćd	4,400.00 USD	[Select Ac	tion] 🗸 🗸	Go Go
				sa M F	Priority Mediun	n			
*	Anomals	Inventory	Purchase	Change	Receiving	Returns			\rightarrow
						Personalize	Find 💷	📕 First 🕚 1-	2 of 2 🕑 Li
	Description		Status	Price	Quan	itity	UOM	Supplier	
2	Porta Potty Rental		Pending Approval	1000.00000	USD	4.0000	EA	Able-Smith Tent	
P ²	Porta Potty Cleaning Servic	e	Pending Approval	100.00000	USD	4.0000	EA .	Able-Smith Tent	×
				Not Chk		175.00 USD		on] 🗸	Go
	374 T Requests Pre-Encu wisition Lifespan formation	374 Test Requisition for Tr Requester Yandon, Melissa M rre-Encumbrance Balance Image: state s	374 Test Requisition for Tr SYRUN Requester Yandon, Melissa M Ent rre-Encumbrance 0.00 Image: State S	374 Test Requisition for Tr SYRUN 11/14/2016 Pending Requester Yandon,Melissa M rre-Encumbrance Balance Entered By Yandon,Meliss 0.00 USD Image: Status 0.00 USD Image: Status Purchase Orders Image: Status Description Status Pending Approval	374 Test Requisition for Tr SYRUN 11/14/2016 Pending Not Chi Requester Yandon,Melissa M Entered By Yandon,Melissa M Intered By Yandon,Melissa M Intered By Yandon,Melissa M Image: Status 0.00 USD Image: Status Image: Status Image: Status Image: Status Description Status Price Image: Status Pending Approval 1000.00000	374 Test Requisition for Tr SYRUN 11/14/2016 Pending Not ChK'd Requester Yandon,Melissa M rre-Encumbrance Balance Entered By Yandon,Melissa M 0.00 USD Priority Mediur Image: Status 0.00 USD Image: Status Priority Mediur Image: Status Approvals Inventory Purchase Orders Change Request Receiving Image: Status Image: Status Price Quar Image: Status Pending Approval 1000.00000 USD	374 Test Requisition for Tr SYRUN 11/14/2016 Pending Not Chk'd 4,400.00 USD Requester Yandon,Melissa M 0.00 USD Priority Medium 0.00 V Immediation Approvals Inventory Purchase Orders Change Request Receiving Returns Inventory Purchase Orders Change Request Returns Inventory Purchase Orders Change Returns Inventory Purchase Orders Change Returns Inventory Purchase Order Inventory Inventory Purchase Order Inventory Inventory Inventory Inventory	374 Test Requisition for Tr SYRUN 11/14/2016 Pending Not Chk'd 4,400.00 USD Requester Yandon,Melissa M Entered By Yandon,Melissa M Priority Medium one 0.00 USD Inventory Purchase Change Receiving Returns Inventory pulsition Approvals Inventory Purchase Change Receiving Returns Inventory Inventory Purchase Orders Price Quantity UOM @ Pending Approval 1000.00000 USD 4.0000 EA	374 Test Requisition for Tr SYRUN 11/14/2016 Pending Not Chk'd 4,400.00 USD Requester Yandon,Melissa M Entered By Yandon,Melissa M Priority Medium 0.00 USD Inventory Purchase Change Inventory Payment Lifespan: Inventory Purchase Change Receiving Returns Invoice Payment Lifespan: Inventory Status Price Quantity UOM Supplier Image Status Price Quantity UOM Supplier

The requisition status is shown by the highlighted icon flow above. You can select the icon to see more details.

End of instructions.