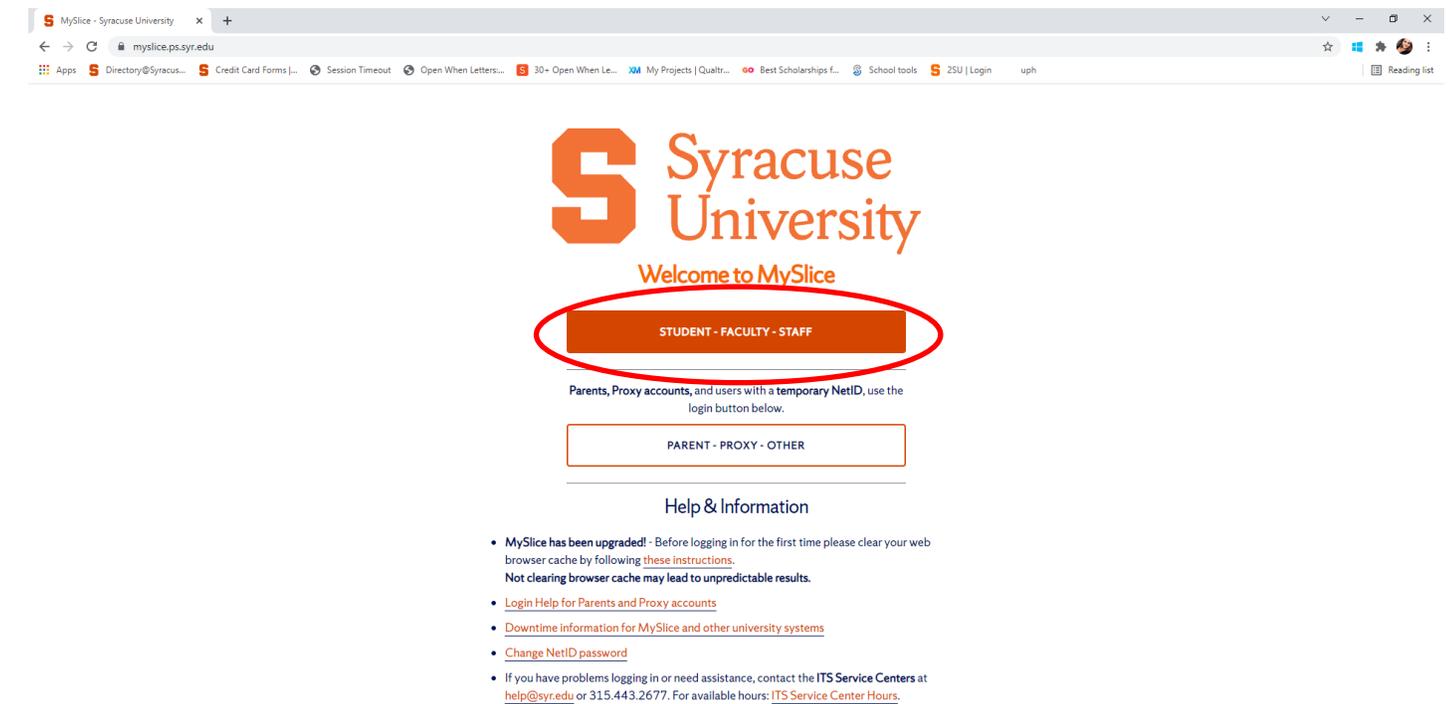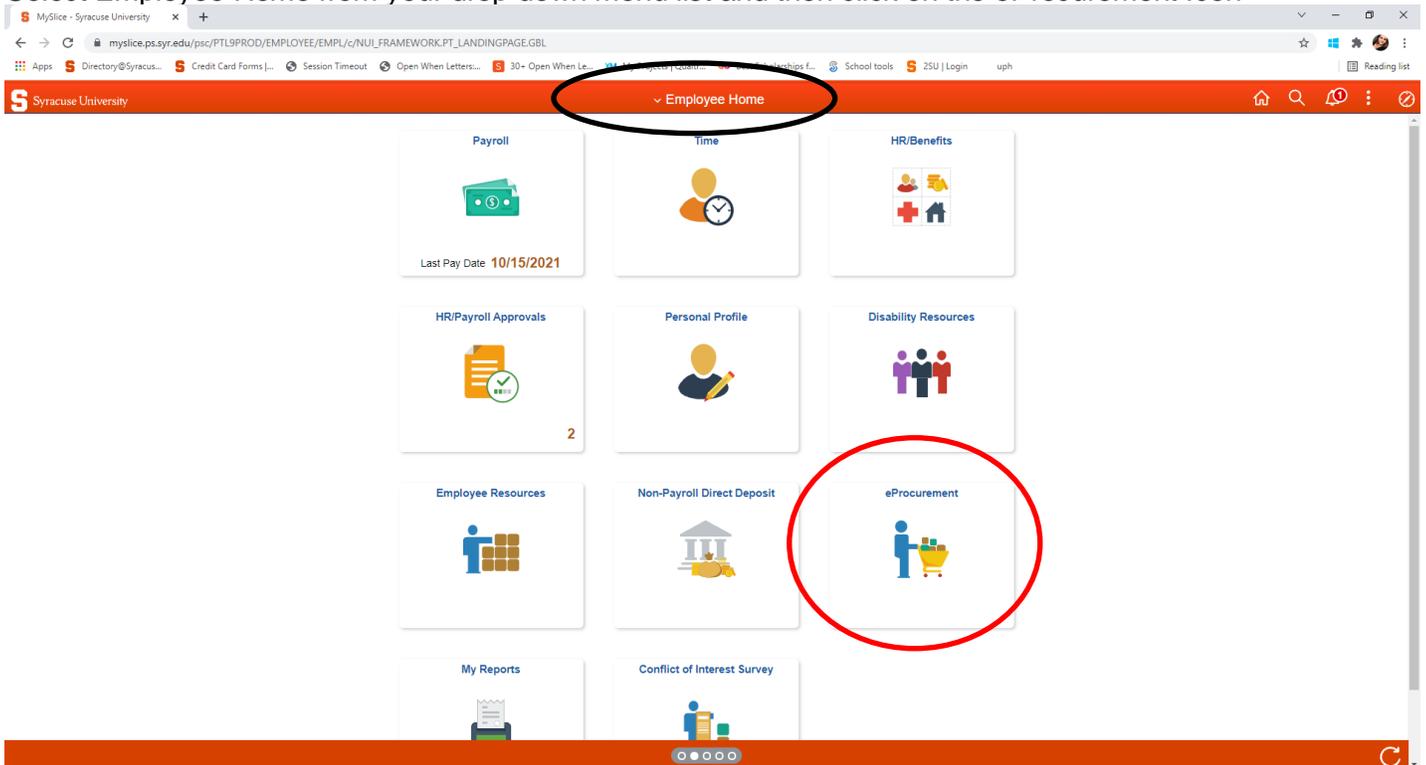# Work Instructions for using the Specials Requests functionality in eProcurement
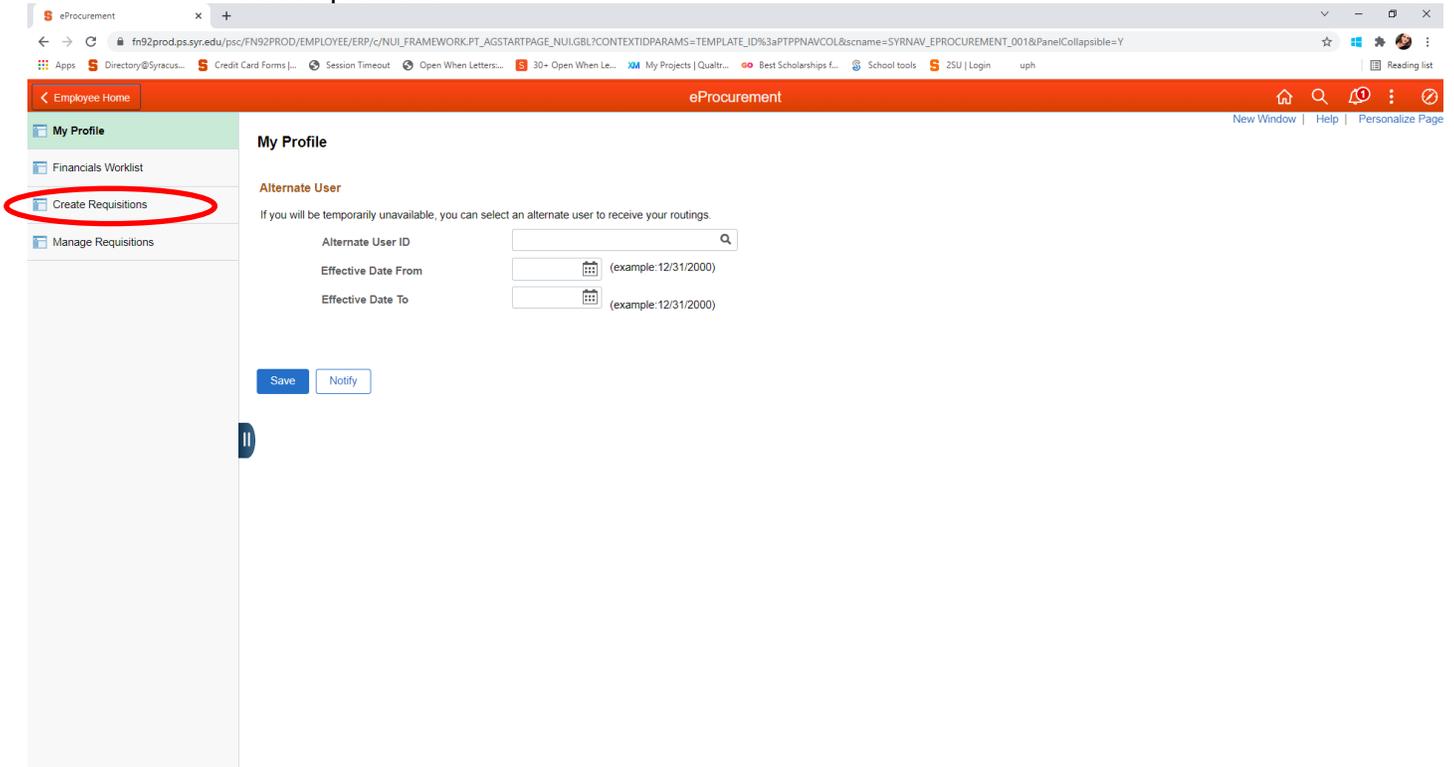
Log in to my slice

Select Employee Home from your drop down menu list and then click on the eProcurement Icon

Then Select create Requisitions

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

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

Favorites	Main Menu	▸ eProcurement	▸ Requisition

Create Requisition ②

Welcome   Caramella,Cynthia

🏠 Home   ⚲ My Preferences   ⚙ Requisition Settings | 🛒 0 Lines   [Checkout]

| Request Options ▼ | Search | Web ▼ | | [Search] | Advanced Search |

Web ②

Web
- WB MASON
- Grainger
- B + H Photo
- Fisher Scientific
- VWR International
- More...

Special Requests

	Merchant	Description
W.B.MASON	WB MASON	Office Supplies
GRAINGER	Grainger	
B+H	B + H Photo	Choose to DISPLAY the nonsecure items.
Fisher Scientific	Fisher Scientific	
VWR We Enable Science	VWR International	
GovConnection IT Solutions and Services	GovConnection	Toners, computer peripherals and accessories.
DELL	Dell	Choose to DISPLAY the nonsecure items.

The following screen should appear

Requisition Settings

Business Unit	SYRUN	Syracuse University	Requisition Name	
Requester	CCARAMEL	Caramella,Cynthia	Priority	Medium ▼
*Currency	USD			

Default Options ②

○ 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.

● 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 ②

Supplier		Category	
Supplier Location		Unit of Measure	
Buyer			

Shipping Defaults

Ship To	SK30210	Attention	
Due Date			

Distribution Defaults

SpeedChart [   ]

Accounting Defaults   Personalize | Find | 🔳 | 🔲   First ④ 1 of 1 ⑤ Last

| Chartfields1 | Details | Asset Information | (≡) |

Dist	Percent	Location	GL Unit	Fund	Dept	Program	Mycode	PC Bus Unit	Project	Activity
1		SK30210	SYRUN							

‹   ›

[OK]   [Cancel]

Scroll Right to see the entire Accounting defaults screen

Accounting Defaults   Personalize | Find | 🔳 | 🔲   First ④ 1 of 1 ⑤ Last

| Chartfields1 | Details | Asset Information | (≡) |

Mycode	PC Bus Unit	Project	Activity	Source Type	Bud Ref	Work Order	Budget Class	
								➕ ➖

‹   ›

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

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

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

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.

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

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

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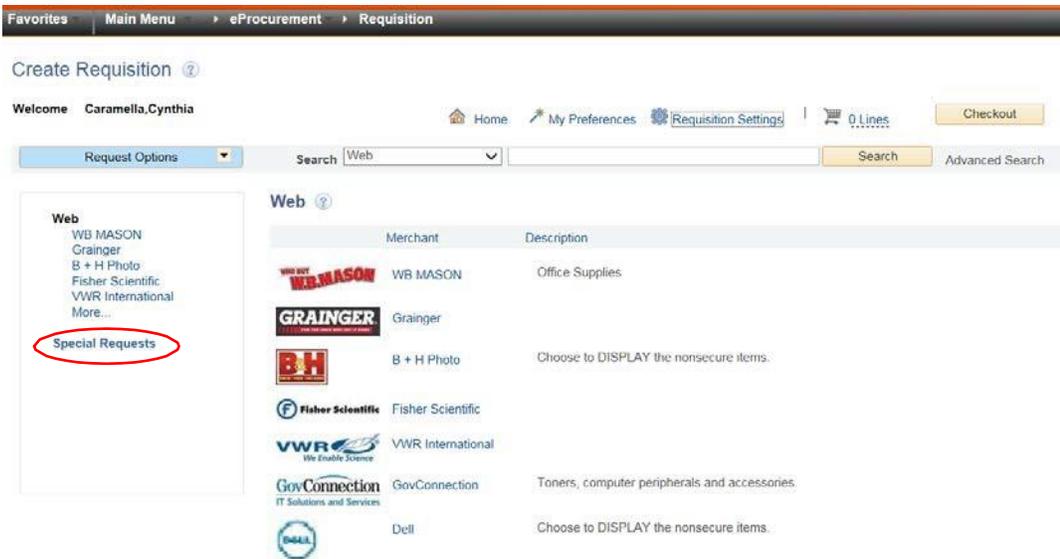
The following screen will appear.

Additional Information

[text box]
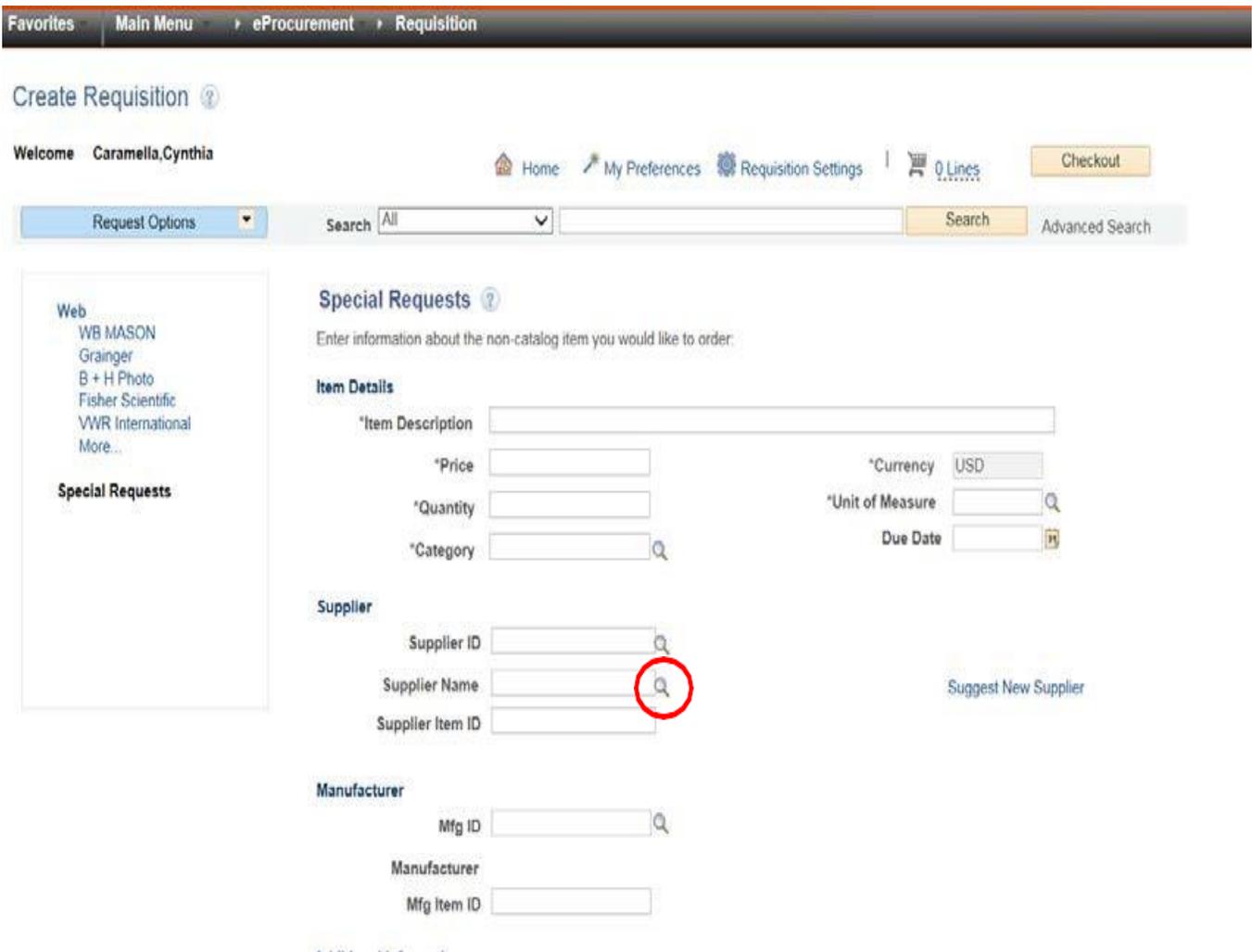
☐ Send to Supplier   ☐ Show at Receipt   ☐ Show at Voucher

Request New Item

☐ Request New Item   A notification will be sent to a buyer 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.
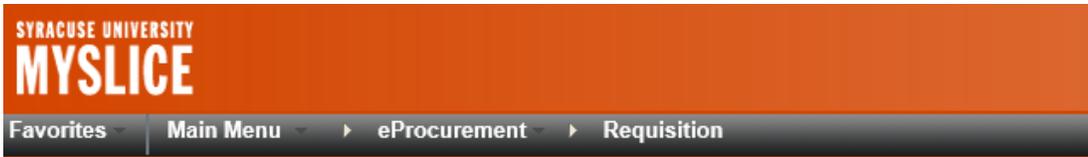
Type in the supplier name and select find.

Select the correct vendor by selecting the Supplier ID number

This will bring you back to the main screen

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

Select Yes to continue

The following screen should appear

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

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

The following screen will appear

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

To see the chartstrings select the Chartfields2 tab

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

The following screen will appear once you select the comment cloud

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

After file is selected then click upload

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

If all lines are okay then proceed to the next section

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

+ 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

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

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

The printable view should appear

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