

SOP #: 4.2.3.1	Area: Purchasing
Title: Purchases \$5,000.01 - \$25,000.00	Effective Date: 03-01-2016
Version #: 1.0	Revision Date: 08-17-2016
Approval Date: 02-26-2016	Review Date: N/A

Title: Purchases \$5,000.01 - \$25,000.00

Purchase transactions from \$5,000.01 - \$25,000.00 require three informal bids or quotes, including a minimum of two from Historically Underutilized Business (HUB) vendors. For assistance finding a HUB vendor, [click here](#) or email HUB@untsystem.edu. Orders should be awarded to the vendor that provides the best value to the institution.


Note: Exceptions to [Bid Requirements include Sole Source, Proprietary, Cooperative Contract, State Contract or UNT System Contract](#). See [Procurement Guide](#) for additional instructions.

Setting up the Requisition

The requisition must be set up before it can be created, reviewed and submitted. Follow the steps below to set up the requisition.

1. Request a minimum of three bids or quotes from vendors.
Note: Price quotes may be taken by phone, by fax, or by email and documentation must be kept on file. Ensure vendors send invoices to Invoices@UNTSystem.edu. Ensure a reasonable amount of time is given to vendors to respond to a request for bid or quote.
2. Enter **EUID** and **Password**.
3. Click **Sign In**.

UNIVERSITY OF NORTH TEXAS SYSTEM



Enterprise Information System

System Login

EUID (required)

Password (required)

Sign In

Trouble logging in?
[Activate my account](#)
[What's my EUID?](#)
[Reset my password](#)

Scheduled Maintenance
Service may be interrupted during these regular maintenance times:

- Tuesday 7:00 - 9:30 pm
- Thursday 7:00 - 9:30 pm
- Saturday 7:00 pm to noon Sunday

The Enterprise Information System is the primary administrative information resource for the University of North Texas System.

This system is the property of the University of North Texas System and your use of this resource constitutes an agreement to abide by relevant federal and state laws and institutional policies. Unauthorized use of this system is prohibited. Violations can result in penalties and criminal prosecution. Usage may be subject to security testing and monitoring. Users have no expectation of privacy except as otherwise provided by applicable privacy laws.

Web Browsers & Settings

Enterprise Information System (EIS) currently supports the following Web browsers and versions:

- Google Chrome 24
- Firefox 17
- Internet Explorer 11, 10, 9, and 8
- Safari 6

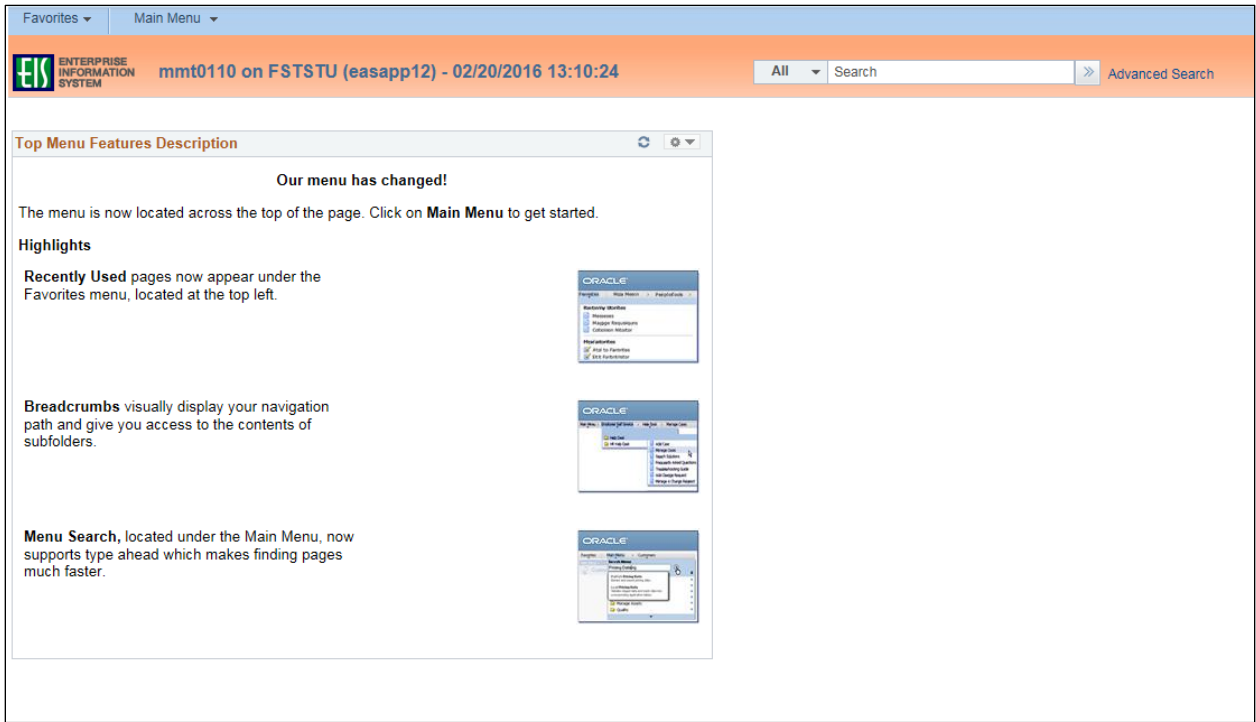
Note: Internet Explorer's Compatibility Mode is unsupported in EIS. Turn off this feature in Internet Explorer under Tools > Compatibility Mode Settings.

To use the Enterprise Information System, set your Web browser to allow JavaScript, accept cookies, and turn off popup blocking.

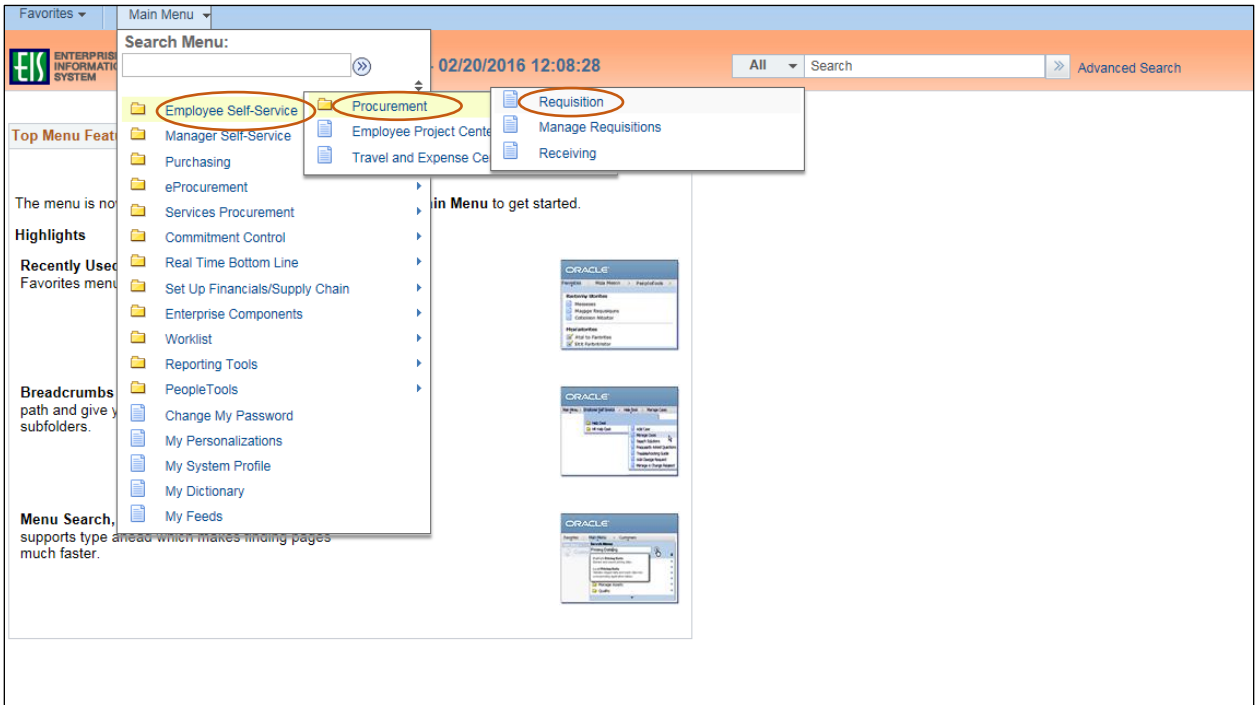
Some documents inside EIS are in PDF format and require the free [Adobe Reader](#) software to open.

[State of Texas](#) • [Statewide Search](#) • [Texas Homeland Security](#) • [Fraud Reporting](#) • [Public Information Act](#) • [Online Institutional Resumes](#)
[University of North Texas](#) • [UNT Health Science Center](#) • [University of North Texas Dallas](#) • [UNT Dallas College of Law](#)
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4. Click **Main Menu**.



5. Navigate to **Requisition** by clicking on Employee Self-Service>Procurement>Requisition.



- Verify that the information in the **Business Unit** and **Requester** fields is correct.

Requisition Settings

Business Unit: SY769 Univ. of North Texas System Requisition Name:

*Requester: E92200 Business Services-Gen Priority: Medium

*Currency: USD

Default 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.

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: Category:

Supplier Location: Unit of Measure:

Buyer:

Shipping Defaults

Ship To: BSCA 400 Add One Time Address

Due Date: Attention:

Distribution Defaults

SpeedChart:

Accounting Defaults

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000					

OK Cancel

- Enter **Requisition Name**.

Note: Give the requisition a meaningful name, as it will be visible when using **Manage Requisitions**.

Requisition Settings

Business Unit: SY769 Univ. of North Texas System Requisition Name: Piano for Dr. Paul

*Requester: E92200 Business Services-Gen Priority: Medium

*Currency: USD

- Click the magnifying glass next to **Supplier** field.

Line Defaults

Supplier: Category:

Supplier Location: Unit of Measure:

Buyer:

9. Enter the vendor name into **Name** field.
10. Click **Find**.

Supplier Search

Supplier ID Find

Name Reset

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

OK Cancel

11. Select the appropriate **Supplier ID** from **Search Results**—confirming it lists the correct address.
Note: If the appropriate **Supplier Name** does not appear in the **Search Results**, click **Cancel**. The Supplier and/or applicable address will be added later using the **Suggest New Supplier** feature located on the **Create Requisition** screen.

Supplier Search

Supplier ID Find

Name Reset

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Search Results							Personalize Find View All First 1 of 1 Last
Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
1 0000065733	Metroplex Piano Inc	000		9292 LBJ Frwy	Dallas	TX	

OK Cancel

Note: Requisition Settings screen opens. The **Supplier ID** and **Default Location** will automatically populate into the requisition in the **Supplier** and **Supplier Location** fields.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Requisition
 EIS ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02 All Search Advanced Search

Requisition Settings

Business Unit SY769 Univ. of North Texas System Requisition Name Piano for Dr. Paul
 *Requester E92200 Business Services-Gen Priority Medium
 *Currency USD Custom Fields

Default 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.
 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 0000065733 Category
 Supplier Location 000 Unit of Measure
 Buyer

Shipping Defaults

Ship To BSCA 400 Add One Time Address
 Due Date Attention

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | First 1 of 1 Last

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000					

OK Cancel

12. Click on the magnifying glass next to **Fund Cat**.

Note: Account and **Alt Acct** should remain blank. These fields will be completed later.

Accounting Defaults Personalize | Find | First 1 of 1 Last

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000					

13. Select the appropriate **Fund Cat** from the **Look Up Fund Cat** dropdown.

Look Up Fund Cat

SetID: SHARE

Fund Category: begins with

Description: begins with

Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results

View 100 First 1-26 of 26 Last

Fund Category	Description
105	Educational & General
120	Auxiliary
200	Designated Operating-Managed
202	Designated Operating-General
207	Quasi Endowment Spendable
250	Unrestricted Loans
255	Quasi Endow Corpus and Apprec
303	Restr Expensible
307	Restr True Endowment Spendable
309	Restr Quasi Endowment Spendabl
350	Loans and Contracts
353	Rest Quasi Endow Corpus/Apprec
355	Restr True Endowment Apprec
360	Restr Expensible Cap Cntrbtm
400	Sponsored Projects-Restr
500	Restr True Endowment Corpus
505	Restr Non-Expend PR Life Inc
700	Net Investment in Plant
720	Retirement of Indebtedness
800	Agency Funds
934	Suspense Fund 34 [CONV ONLY]
993	Suspense NTfund 93 [CONV ONLY]
996	Suspense Unmapped [CONV ONLY]
997	Suspense for Plant [CONV ONLY]
998	Suspense Inactive [CONV ONLY]
999	Suspense [CONV ONLY]

14. Click on the magnifying glass next to **Fund**.

Accounting Defaults

Personalize | Find | 1 of 1 | Last

Chartfields1 | Details | Asset Information

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000	200				

15. Select the appropriate **Fund** from the **Look Up Fund** dropdown.

The 'Look Up Fund' dialog box is open, showing search results for the Fund field. The search criteria are SetID: SHARE and Fund: begins with. The search results list various department codes and descriptions. The 'Accounting Defaults' table in the background shows the following columns: Dist, Percent, Location, GL Unit, Account, Alt Acct, Dept, Fund Cat, Fund, and Function.

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function
1		BSCP 400	SY769			922000	200		

16. Click on the magnifying glass next to **Function**.

The 'Accounting Defaults' table is shown with the 'Function' column highlighted. The magnifying glass icon next to the 'Function' column indicates the next step in the process.

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000	200	830001			

17. Select the appropriate **Function** from the **Look Up Function** dropdown.

The screenshot shows the 'Requisition Settings' screen in the EIS system. The 'Look Up Function' dropdown is open, displaying a list of functions. The 'Function' field in the dropdown is set to 'begins with'. The search results list includes various functions such as 'Instruction-General', 'Instruction-Sponsored', 'Practice Direct', 'Research-Sponsored', 'Academic Support', and 'Departmental Administration'. The 'Function' field in the main form is currently empty.

18. Click **OK**.

Note: The **Create Requisition** screen will open.

The screenshot shows the 'Requisition Settings' screen after clicking 'OK'. The 'Requisition Name' field is now populated with 'Piano for Dr. Paul'. The 'Function' field in the 'Accounting Defaults' table is now set to '200'. The 'Look Up Function' dropdown is closed.

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000	200	830001	200		

Completing the Requisition Using CAP-IT Guidelines

You must ensure each requisition contains all of the necessary components and follows the required process. Use the acronym CAP-IT to complete each requisition correctly. CAP-IT details all a requisition should include. Refer often to the CAP-IT acronym to ensure requisitions are being completed correctly.

Code using category code best describing the purchase.

Attach all documents.

Purpose statement should define how purchase will benefit the institution.

Information in the Justification Comments must include:

- ✓ Department contact full name, full phone number & email.
- ✓ Vendor contact full name, full phone number & email.
- ✓ Any special requirements or handling requests (ex. Where to email order).
- ✓ Service dates and/or date needed.
- ✓ Reference full name and contract number of any Co-operative contracts, if applicable.
- ✓ Note if sole source, proprietary justification, and/or bid tab is included, if applicable.

Track order using **Manage Requisitions**.

Creating the Requisition

To create the requisition, follow the steps below before moving on to the final phase of review and submission.

1. Click **New Requisition** under the **ePro Services** section.

The screenshot shows the 'Create Requisition' page in the EIS system. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The page title is 'Create Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page features a search bar and a 'Checkout' button. The main content area is divided into several sections: 'Request Options', 'ePro Services', 'Web', 'Forms', 'Favorites', 'Recently Ordered', and 'External Catalogs'. The 'ePro Services' section contains a link for 'New Requisition', which is circled in red. The 'Recently Ordered' section shows a list of items, including 'computer dell optiplex 9020' and 'Computer, Dell, Optiplex 902... item 1 Goods'.

2. Type the line item description from the price bid or quote received from the vendor in the **Goods/Service Description** field.

Note: Descriptions should be concise, but complete and should include part number, catalog number, or model number if available, along with a detailed description.

The screenshot shows the 'New Requisition' form in the EIS system. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The page title is 'Create Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page features a search bar and a 'Checkout' button. The main content area is divided into several sections: 'All Request Options', 'ePro Services', 'Web', 'Forms', 'Favorites', 'Recently Ordered', and 'External Catalogs'. The 'ePro Services' section contains a link for 'New Requisition'. The 'New Requisition' form is displayed with the following fields: '*Goods/Service Description', 'Quantity', 'Amount', '*Category', 'Supplier ID', 'Supplier Name', 'Quote Number', 'Beginning Date', '*Unit of Measure', '*Currency Code', 'Quote Date', and 'Date of Completion'. The 'Supplier ID' field is populated with '0000065733' and the 'Supplier Name' field is populated with 'Metroplex Plano Inc'. The 'Quote Date' and 'Date of Completion' fields are both empty. The 'Additional Information' section is empty. The 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher' checkboxes are all unchecked. The 'Add to Cart' button is visible at the bottom.

3. Type number of items in **Quantity** field.

The screenshot shows the 'Create Requisition' page in the EIS system. The page title is 'Create Requisition' and the user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page is divided into a header, a navigation bar, and a main content area. The main content area is titled 'New Requisition' and contains a form for creating a new requisition. The form fields are: *Goods/Service Description (Petrof Baby Grand Piano), Quantity (highlighted with a red circle), *Unit of Measure, Amount, *Category, Supplier ID (0000065733), Supplier Name (Metroplex Piano Inc), Quote Number, Beginning Date, *Currency Code (USD), Quote Date, and Date of Completion. There are also checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', and an 'Add to Cart' button.

4. Click the magnifying glass next to the **Unit of Measure** field.

Note: **Unit of Measure** can be typed directly in the field without using the lookup feature.

The screenshot shows the 'Create Requisition' page in the EIS system, similar to the previous one. The page title is 'Create Requisition' and the user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The main content area is titled 'New Requisition' and contains a form for creating a new requisition. The form fields are: *Goods/Service Description (Petrof Baby Grand Piano), Quantity (1), *Unit of Measure (magnifying glass icon highlighted with a red circle), Amount, *Category, Supplier ID (0000065733), Supplier Name (Metroplex Piano Inc), Quote Number, Beginning Date, *Currency Code (USD), Quote Date, and Date of Completion. There are also checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', and an 'Add to Cart' button.

- Select the appropriate **Unit of Measure** from **Look Up Unit of Measure** dropdown.

The screenshot shows the 'Look Up Unit of Measure' dialog box. The search results table is as follows:

Unit of Measure	Description	Short Description
ACR	Acres	Acres
AMP	Ampule	Ampule
AN	As Needed	As Needed
AVC	Average Cost Dollars	AvgCost
B15	BAG 15	BAG 15
B25	BAG 25	BAG 25
B50	BAG 50	BAG 50
BAG	Bag	Bag
SBL	Barrel - Liquid Measure	Barrel
BD	Bundle	Bundle
BE	Bale	Bale
BOT	Bottle	Bottle
BOX	Box	Box
BRL	BARREL	BARREL
BSD	Bushel - Dry Measure	Bushel
C	Celsius	Celsius
CA	Cartridge	Cartridge
CAN	CAN	CAN
CCF	Hundred Cubic Feet	Hundred CF
CCM	Cubic Centimeters	Cu Centim
CDM	Cubic Decimeters	Cu Decim
CE	Cone	Cone
CF	Cubic Feet	Cu Ft
CG	Centigrams	Centigram
CHN	Chain	Chain
CL	Centiliters	Centiliter
CM	Centimeters	Centimeter
CMM	Cubic Millimeters	Cu Millim
CN	Pail	Pail
CO	Container	Container
CRD	Card	Card
CRT	CRATE	CRATE
CS	Case	Case
CTN	Carton	Carton
CUF	Cubic Feet	Cu Foot
CUI	Cubic Inches	Cu Inch
CUM	Cubic Meters	Cu Meter
CUY	Cubic Yards	Cu Yard
CWT	Cubic Weight	Cu Wt
CYL	Cylinder	Cylinder
D	500	500
DAY	Days	Days
DG	Decigrams	Decigram

- Enter the bid or quote amount received from vendor in the **Amount** field.

The screenshot shows the 'New Requisition' form with the following fields:

- *Goods/Service Description: Petrof Baby Grand Piano
- Quantity: 1
- Amount**: (Circled in red)
- *Unit of Measure: EA
- *Currency Code: USD
- *Category: (Empty)
- Supplier ID: 0000065733
- Supplier Name: Metroplex Piano Inc
- Quote Number: (Empty)
- Beginning Date: (Empty)
- Quote Date: (Empty)
- Date of Completion: (Empty)

Additional Information section includes checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', and an 'Add to Cart' button.

7. Click on the magnifying glass next to **Category**.

Enterprise Information System (EIS) interface for creating a requisition. The page title is "Create Requisition". The user is logged in as "mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02". The page shows a "New Requisition" form with the following fields:

- *Goods/Service Description: Petrof Baby Grand Piano
- Quantity: 1
- Amount: 19,500.00
- *Category: [Field with magnifying glass icon]
- Supplier ID: 0000065733
- Supplier Name: Metroplex Piano Inc
- Quote Number: [Field with question mark]
- Beginning Date: [Field with question mark]
- *Unit of Measure: EA
- *Currency Code: USD

Additional information section includes checkboxes for "Send to Supplier", "Show at Receipt", and "Show at Voucher", and an "Add to Cart" button.

8. Click on the dropdown arrow next to **Category** to open **Search By** options.

Enterprise Information System (EIS) interface for looking up a category. The page title is "Look Up Category". The user is logged in as "mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02". The page shows a "Search Categories" section with the following options:

- Note: You may either Search or Browse to look up the appropriate category for your special request.
- Search Categories: [Section with dropdown menu]
- Search By: Category [Dropdown menu]
- Find: [Button]
- Browse Category Tree: [Section with tree view]
- Return: [Button]

9. Select **Description** from the **Search By** dropdown menu.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Requisition

ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02 All ▾ Search >> Advanced Search

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By **Category**
Description

Find

Browse Category Tree

Return

10. Type a word to search in the empty field next to **Category** or **Description**.

Note: A partial word can be used. Do not use multiple words. If no word is entered, the entire **Category** or **Description** list will be available to view in the dropdown.

11. Click **Find**.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Requisition

ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/22/2016 09:06:43 All ▾ Search >> Advanced Search

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By Description ▾ Furniture

Find

Browse Category Tree

Return

12. Click on the appropriate **Category** based on the **Description** field.

Note: Select the category code that best describes the purchase. Accuracy is important as **Category** drives **Account** and **Alt Acct** expenditure codes. Choosing the correct **Category** also allows special approvers to be automatically inserted into the approval workflow.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Requisition

ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/22/2016 09:06:43 All ▾ Search >> Advanced Search

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By Description ▾ Furniture Find

Categories Personalize | Find | View All | First 1 of 1 Last

Catalog	Category	Description	Find in Tree
1 PROCUREMENT	931-46	Maintenance - Furniture	

Browse Category Tree

Return

13. Click on **Suggest New Supplier** if **Supplier ID** and **Supplier Name** are not completed.
Note: Skip steps 13-15 if **Suggested Supplier** is not needed.

The screenshot shows the 'Create Requisition' page in the EIS system. The page title is 'Create Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page contains a navigation menu with 'Home', 'My Preferences', 'Requisition Settings', and '0 Lines'. The main form is titled 'New Requisition' and includes the following fields:

- *Goods/Service Description: Petrof Baby Grand Piano
- Quantity: 1
- *Unit of Measure: EA
- Amount: 19,500.00
- *Currency Code: USD
- *Category: [Empty]
- Supplier ID: 0000065733
- Supplier Name: [Empty]
- Quote Number: [Empty]
- Beginning Date: [Empty]
- Quote Date: [Empty]
- Date of Completion: [Empty]

A 'Suggest New Supplier' button is circled in red. Below the main form is an 'Additional Information' section with a text area and three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Add to Cart' button is located at the bottom of the form.

14. Enter **Supplier Name, Contact Name, Address Information, Full Phone Number** and **Comments** on the **Suggested Supplier** screen.
Note: Complete all fields indicated above, as you will be unable to return to edit or add Suggested Supplier information after clicking **OK**. In addition, you should obtain a W-9 from the Supplier that should be attached to the requisition.

The screenshot shows the 'Suggested Supplier' page in the EIS system. The page title is 'Suggested Supplier'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page contains a navigation menu with 'Home', 'My Preferences', 'Requisition Settings', and '0 Lines'. The main form is titled 'Suggested Supplier' and includes the following fields:

- Supplier Name: [Empty]
- Contact Name: [Empty]
- Address Information:
 - Country: [Empty]
 - Address 1: [Empty]
 - Address 2: [Empty]
 - Address 3: [Empty]
 - City: [Empty]
 - State: [Empty]
 - Postal: [Empty]
- Phone Information:
 - Phone Type: [Empty]
 - Prefix: [Empty]
 - Telephone: [Empty]
 - Ext: [Empty]
- Comments: [Empty]

The 'OK' and 'Cancel' buttons are located at the bottom of the form. A note indicates '254 characters remaining' for the comments field.

15. Click **OK**.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Requisition

EIS ENTERPRISE INFORMATION SYSTEM **mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02** All ▾ Search >> Advanced Search

Suggested Supplier

Supplier Name

Contact Name

Address Information

Country

Address 1

Address 2

Address 3

City

State Postal

Phone Information

Phone Type Prefix

Telephone Ext

Comments

254 characters remaining

Note: The **Create Requisition** screen will be updated with the **Suggested Supplier** noted. The **Supplier ID** and **Supplier Name** will continue to be blank.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Requisition

EIS ENTERPRISE INFORMATION SYSTEM **mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02** All ▾ Search >> Advanced Search

Create Requisition ?

Welcome Business Services-Gen [Home](#) [My Preferences](#) [Requisition Settings](#) | [0 Lines](#)

Request Options ▾ Search All ▾ Advanced Search

All Request Options

ePro Services
New Requisition

Web

Forms

Favorites

Recently Ordered

External Catalogs

New Requisition

*Goods/Service Description

Quantity *Unit of Measure

Amount *Currency Code

*Category

Supplier ID

Supplier Name

Quote Number

Beginning Date

Suggested Supplier

Quote Date

Date of Completion

Additional Information

Send to Supplier Show at Receipt Show at Voucher

16. Enter **Quote Number**.

Note: If a quote number is not available and the quote is from a website, provide site address. If quote received via phone, fax or email, provide the name of person who provided quote.

The screenshot shows the 'Create Requisition' page in the UNT System Business Support Services. The page title is 'Create Requisition' and the user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/22/2016 09:06:43'. The page is divided into a left sidebar with navigation options like 'All Request Options', 'ePro Services', and 'New Requisition'. The main content area is titled 'New Requisition' and contains a form for entering requisition details. The form fields include: *Goods/Service Description (Petrof Baby Grand Piano), Quantity (1), Amount (19,500.00), *Category (931-46), Supplier ID (0000065733), Supplier Name (Metroplex Piano Inc), and Quote Number (888888888). The 'Quote Number' field is highlighted with a red circle. Other fields include *Unit of Measure (EA), *Currency Code (USD), Quote Date, and Date of Completion. There are also checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', and an 'Add to Cart' button.

17. Enter **Quote Date** by clicking on calendar icon.

The screenshot shows the 'Create Requisition' page in the UNT System Business Support Services. The page title is 'Create Requisition' and the user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/22/2016 12:42:53'. The page is divided into a left sidebar with navigation options like 'All Request Options', 'ePro Services', and 'New Requisition'. The main content area is titled 'New Requisition' and contains a form for entering requisition details. The form fields include: *Goods/Service Description (Petrof Baby Grand Piano), Quantity (1), Amount (19,500.00), *Category (931-46), Supplier ID (0000065733), Supplier Name (Metroplex Piano Inc), and Quote Number (888888888). The 'Quote Date' field is highlighted with a red circle. Other fields include *Unit of Measure (EA), *Currency Code (USD), Quote Date, and Date of Completion. There are also checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', and an 'Add to Cart' button.

18. Select the date the quote was received.

Enterprise Information System
mmt0110 on FSTSTU (easapp12) - 02/22/2016 12:42:53

Create Requisition

Welcome Business Services-Gen

Request Options: Search All

New Requisition

*Goods/Service Description: Petrof Baby Grand Piano
Quantity: 1 *Unit of Measure: EA
Amount: 19,500.00 *Currency Code: USD
*Category: 931-46
Supplier ID: 0000065733 Suggest New Supplier
Supplier Name: Metroplex Piano Inc
Quote Number: 888888888 ?
Quote Date: [Calendar Icon] ?
Beginning Date: [Calendar Icon] ?
Date of Completion: [Calendar Icon] ?

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

19. Enter **Beginning Date** by clicking on calendar icon.

Enterprise Information System
mmt0110 on FSTSTU (easapp12) - 02/22/2016 12:42:53

Create Requisition

Welcome Business Services-Gen

Request Options: Search All

New Requisition

*Goods/Service Description: Petrof Baby Grand Piano
Quantity: 1 *Unit of Measure: EA
Amount: 19,500.00 *Currency Code: USD
*Category: 931-46
Supplier ID: 0000065733 Suggest New Supplier
Supplier Name: Metroplex Piano Inc
Quote Number: 888888888 ?
Quote Date: 02/09/2016
Beginning Date: [Calendar Icon] ?
Date of Completion: [Calendar Icon] ?

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

20. Select the appropriate date based on whether ordering Goods or Services.
Note: For Goods, select the date that the quote will expire. For Services, select the date that indicates when the service is to begin.

The screenshot shows the 'Create Requisition' page for 'Business Services-Gen'. The 'New Requisition' section contains the following fields:

- *Goods/Service Description: Petrof Baby Grand Piano
- Quantity: 1
- *Unit of Measure: EA
- Amount: 19,500.00
- *Currency Code: USD
- *Category: PROCUREMENT
- Supplier ID: 0000065733
- Supplier Name: Metroplex Piano Inc
- Quote Number: 888888888
- Quote Date: 02/08/2016
- Beginning Date: [calendar icon]
- Date of Completion: [calendar icon]

The 'Date of Completion' field is highlighted with a red circle, and a calendar pop-up is open over it, showing the date 02/15/2016 selected.

21. Enter the **Date of Completion** by clicking on the calendar icon.

The screenshot shows the 'Create Requisition' page for 'Business Services-Gen'. The 'New Requisition' section contains the following fields:

- *Goods/Service Description: Petrof Baby Grand Piano
- Quantity: 1
- *Unit of Measure: EA
- Amount: 19,500.00
- *Currency Code: USD
- *Category: PROCUREMENT
- Supplier ID: 0000065733
- Supplier Name: Metroplex Piano Inc
- Quote Number: 888888888
- Quote Date: 02/08/2016
- Beginning Date: 02/15/2016
- Date of Completion: [calendar icon]

The 'Date of Completion' field is highlighted with a red circle, and a calendar pop-up is open over it, showing the date 02/15/2016 selected.

22. Select the appropriate date based on whether ordering Goods or Services.

Note: For Goods, select the 'deliver by' date. For Services, select the date when the task should be completed. Normal business practice allows a 30 day turnaround for vendors.

Enterprise Information System
mmt0110 on FSTSTU (easapp12) - 02/22/2016 13:50:46

Create Requisition

Welcome Business Services-Gen

Request Options: Search All

New Requisition

*Goods/Service Description: Petrof Baby Grand Piano
Quantity: 1
Amount: 19,500.00
*Category: 931-46
Supplier ID: 0000065733
Supplier Name: Metroplex Piano Inc
Quote Number: 888888888
Beginning Date: 02/15/2016
*Unit of Measure: EA
*Currency Code: USD
Quote Date: 02/08/2016
Date of Completion: [?]

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

23. Type any necessary information in the **Additional Information** field.

24. Click **Add to Cart**.

Note: If you need to send the information you typed in the **Additional Information** field to the Supplier, Receipt, or Voucher, check the appropriate box below the **Additional Information** field.

Enterprise Information System
mmt0110 on FSTSTU (easapp12) - 02/22/2016 13:50:46

Create Requisition

Welcome Business Services-Gen

Request Options: Search All

New Requisition

*Goods/Service Description: Petrof Baby Grand Piano
Quantity: 1
Amount: 19,500.00
*Category: 931-46
Supplier ID: 0000065733
Supplier Name: Metroplex Piano Inc
Quote Number: 888888888
Beginning Date: 02/15/2016
*Unit of Measure: EA
*Currency Code: USD
Quote Date: 02/08/2016
Date of Completion: 02/29/2016

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

25. Repeat steps 2-12 and 16-24 for each item to be purchased from this **Supplier**.
Note: You must repeat steps 13-15 for each item to be purchased from the **Suggested Supplier**. Create a new Requisition if a different supplier is to be used. Number of lines in the order will be visible beside the **Shopping Cart** icon located next to **Checkout**.
26. Click **Checkout** when order is complete.

Favorites > Main Menu > Employee Self-Service > Procurement > Requisition
 EIS ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02 All Search Advanced Search

Create Requisition
 Welcome Business Services-Gen Home My Preferences Requisition Settings 2 Lines Checkout


Request Options Search All Search Advanced Search

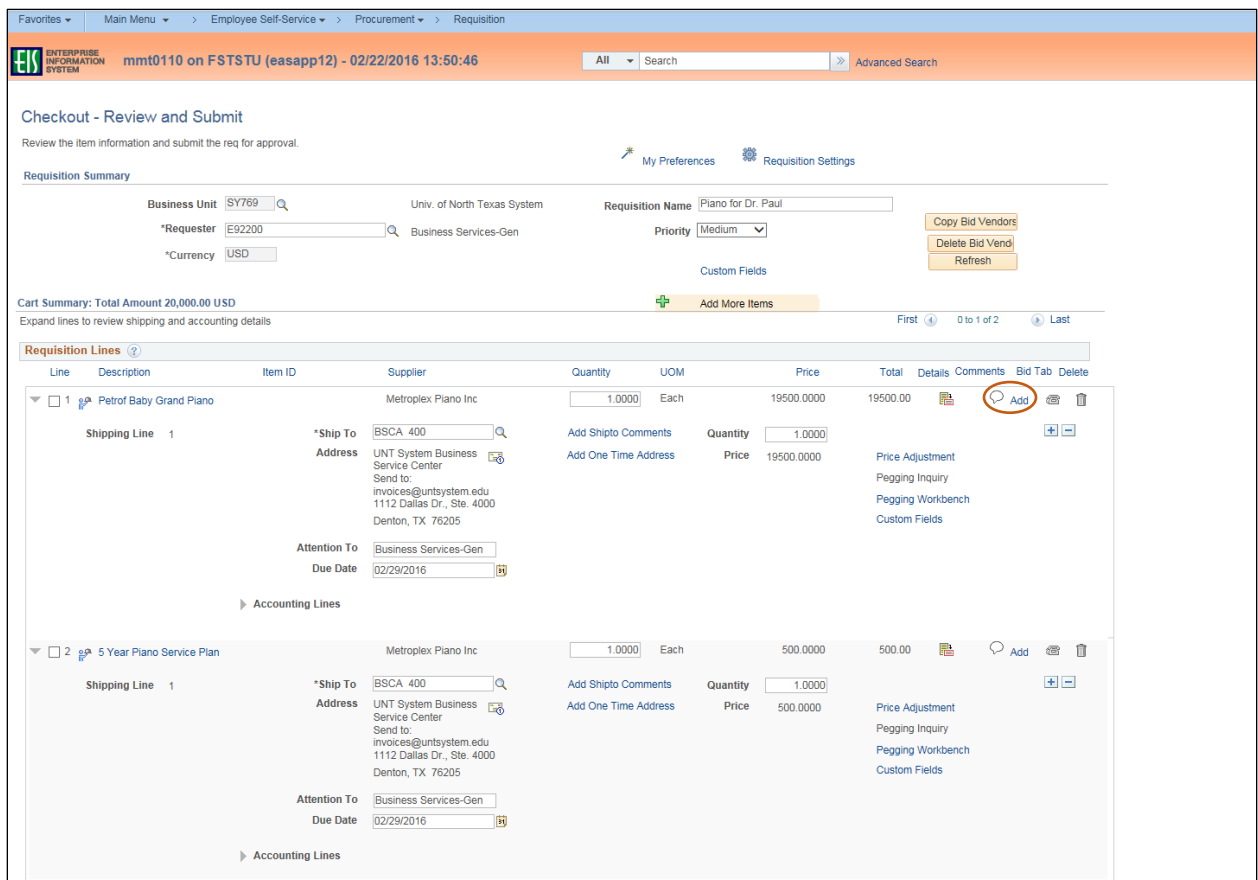
New Requisition
 *Goods/Service Description
 Quantity *Unit of Measure
 Amount *Currency Code USD
 *Category Suggest New Supplier
 Supplier ID 0000065733
 Supplier Name Metroplex Piano Inc
 Quote Number Quote Date
 Beginning Date Date of Completion

Additional Information
 Send to Supplier Show at Receipt Show at Voucher
 Add to Cart

Reviewing Requisition Details

Requisitions must be reviewed before submission. Follow the steps below to ensure the requisition is correct before proceeding.

1. Review the **Requisition Line** items on the **Checkout – Review and Submit** screen for correctness and completion.
Note: Click on **Add More Items** if additional line items need to be added. This will return you back to step 2 of Creating a Requisition.
2. Click the **Comment** icon  or **Add** in the **Requisition Lines** section.
Note: Comments and attachments only need to be completed for Line 1 unless special instructions are needed for other line items.



Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit SY769 Univ. of North Texas System Requisition Name Piano for Dr. Paul
*Requester E92200 Business Services-Gen Priority Medium
*Currency USD

Copy Bid Vendors
Delete Bid Vendl
Refresh

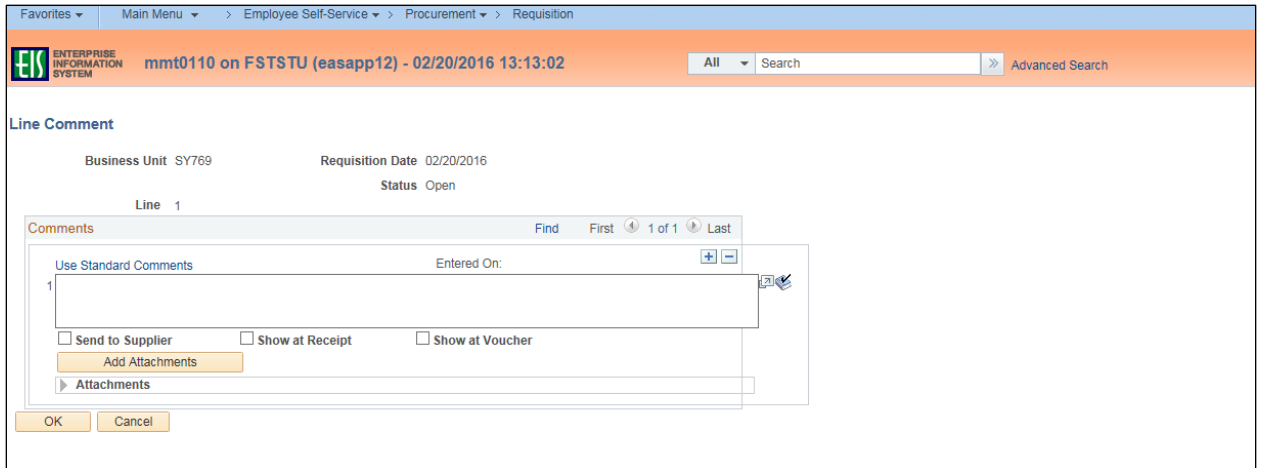
Custom Fields

Cart Summary: Total Amount 20,000.00 USD
Expand lines to review shipping and accounting details Add More Items First 0 to 1 of 2 Last

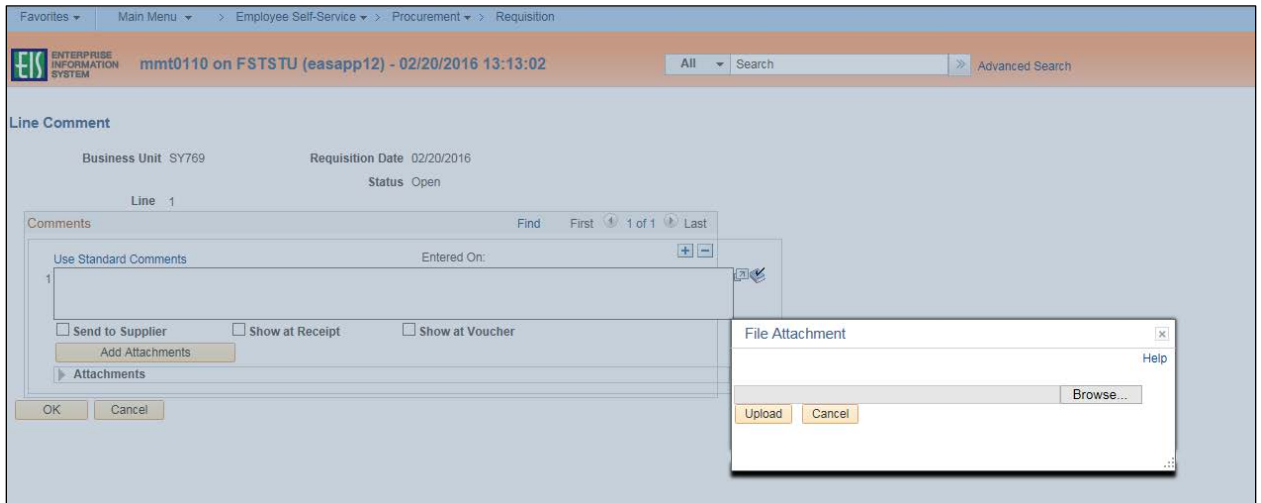
Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Petrof Baby Grand Piano		Metroplex Piano Inc	1.0000	Each	19500.0000	19500.00				
	Shipping Line 1										
	*Ship To	BSCA 400		Add Shipto Comments	Quantity	1.0000					
	Address	UNT System Business Service Center Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205		Add One Time Address	Price	19500.0000			Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields		
	Attention To	Business Services-Gen									
	Due Date	02/29/2016									
	Accounting Lines										
2	5 Year Piano Service Plan		Metroplex Piano Inc	1.0000	Each	500.0000	500.00				
	Shipping Line 1										
	*Ship To	BSCA 400		Add Shipto Comments	Quantity	1.0000					
	Address	UNT System Business Service Center Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205		Add One Time Address	Price	500.0000			Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields		
	Attention To	Business Services-Gen									
	Due Date	02/29/2016									
	Accounting Lines										

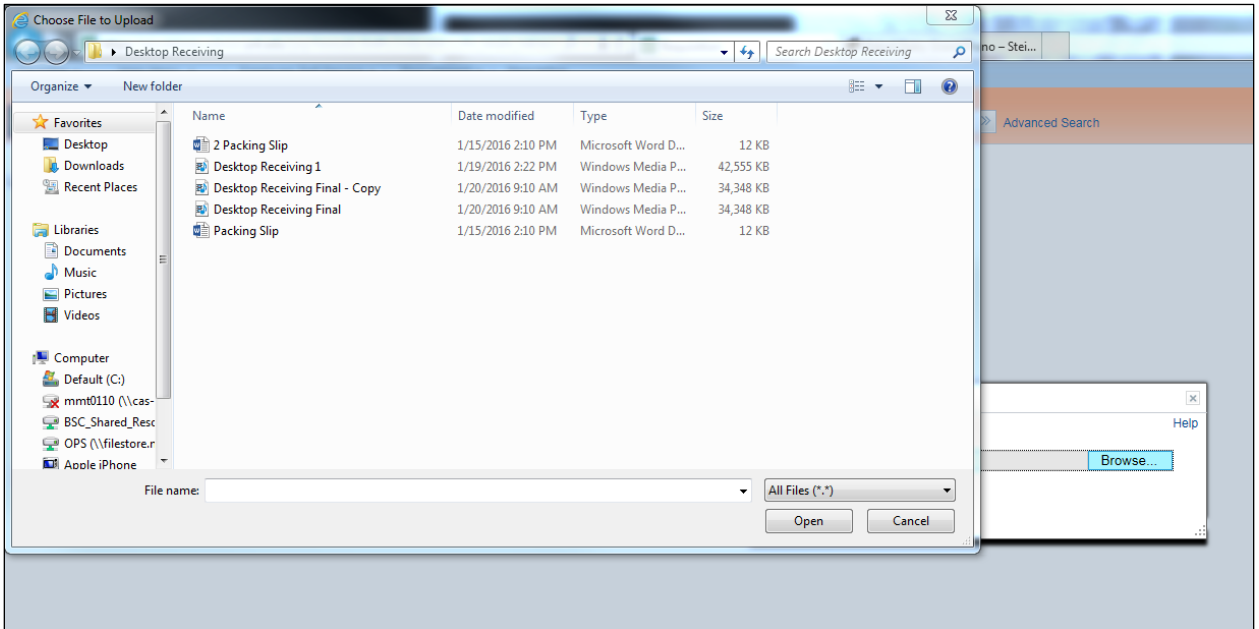
- Enter comment in the **Comments** field within the **Line Comment** section.
Note: Line comment is specific to the line item and is different from the **Requestor Comment** on the **Checkout – Review and Submit** screen. If you need to send the information you typed in the **Comments** field to the Supplier, Receipt, or Voucher, check the appropriate box below the **Comments** field.
- Click **Add Attachments**.
Note: Ensure all applicable documents are attached. Attach Supplier W-9 for **Suggested Suppliers**. Attach [Proprietary/Sole Source Purchase Justification form](#), if applicable.



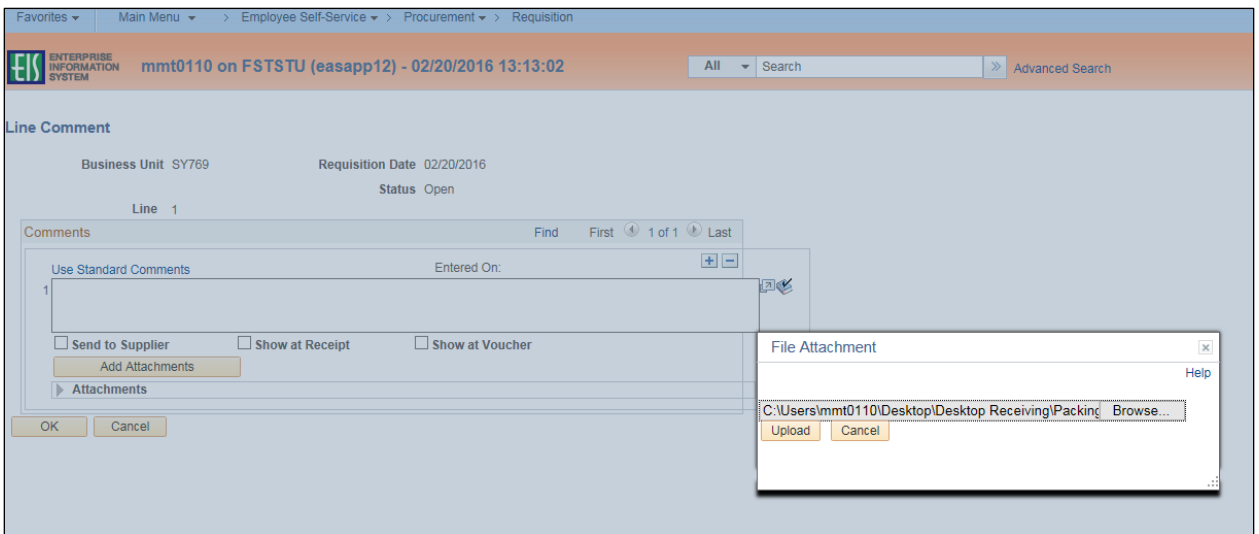
- Click on **Browse** in the **File Attachment** box.



6. Select file to upload from browser window.
7. Click **Open**.



8. Click **Upload** in **File Attachment** box.



9. Confirm file was uploaded by verifying file is showing in the **Attachments** section.
10. Repeat steps 4-9 for each file that needs to be uploaded.
Note: Attached files can be removed by the individual that attached them by clicking on the minus sign next to the attachment that needs to be removed in the **Attachments** section.
11. Click **OK**.

Line Comment

Business Unit SY769 Requisition Date 02/20/2016
 Status Open

Line 1

Comments Find First 1 of 1 Last

Use Standard Comments Entered On: 02/20/2016 4:07:00PM


1

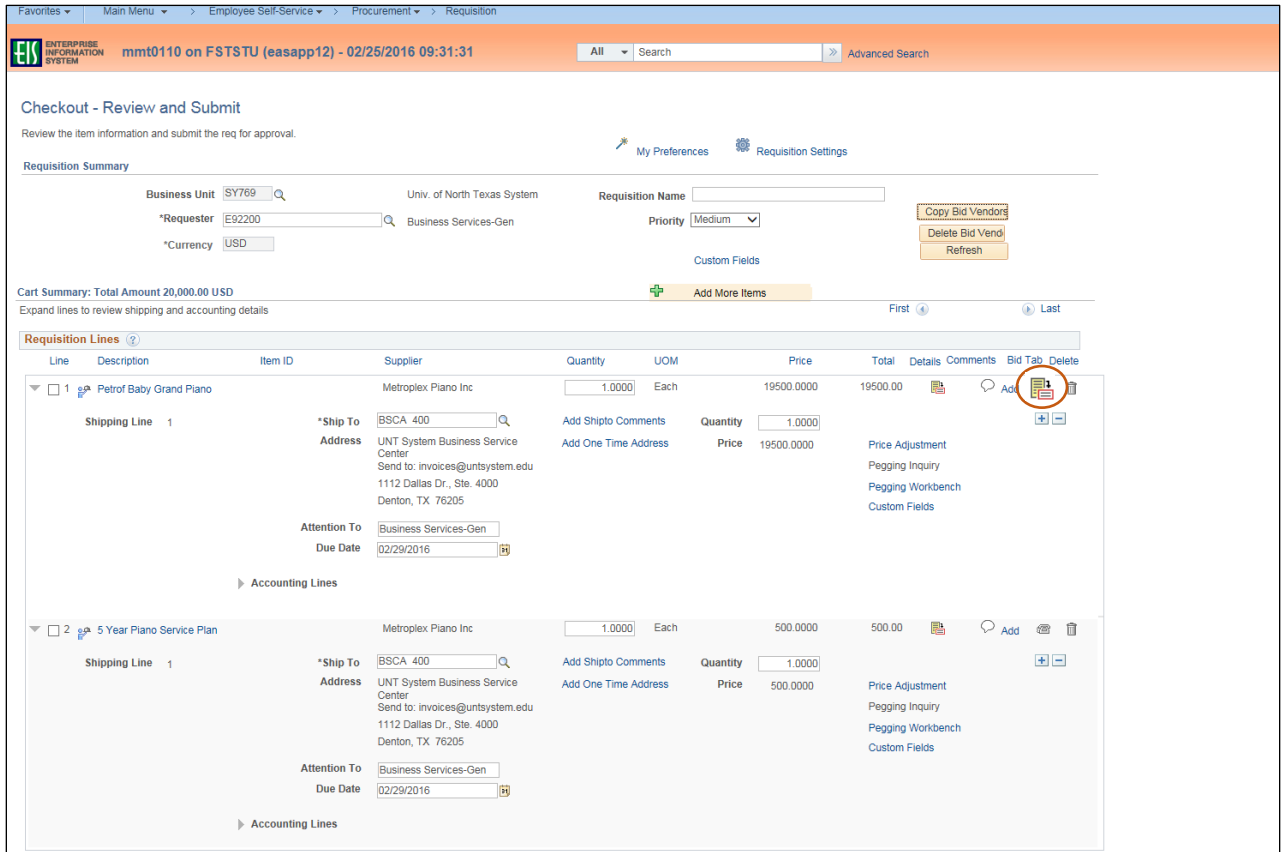
Send to Supplier Show at Receipt Show at Voucher

Add Attachments

Attachments		View	Send to Supplier
Attached File	User/Date Time		
1 Packing_Slip.docx	mmt01102016-02-20-16.44.19.753	View	<input type="checkbox"/>

OK Cancel

12. Click the line details icon  when creating a requisition for a blanket order with a quantity of 1.
Note: If you are not creating a requisition for a blanket order, skip to step 15.



Checkout - Review and Submit

Review the item information and submit the req for approval.



Requisition Summary

Business Unit: SY769 Univ. of North Texas System Requisition Name: []

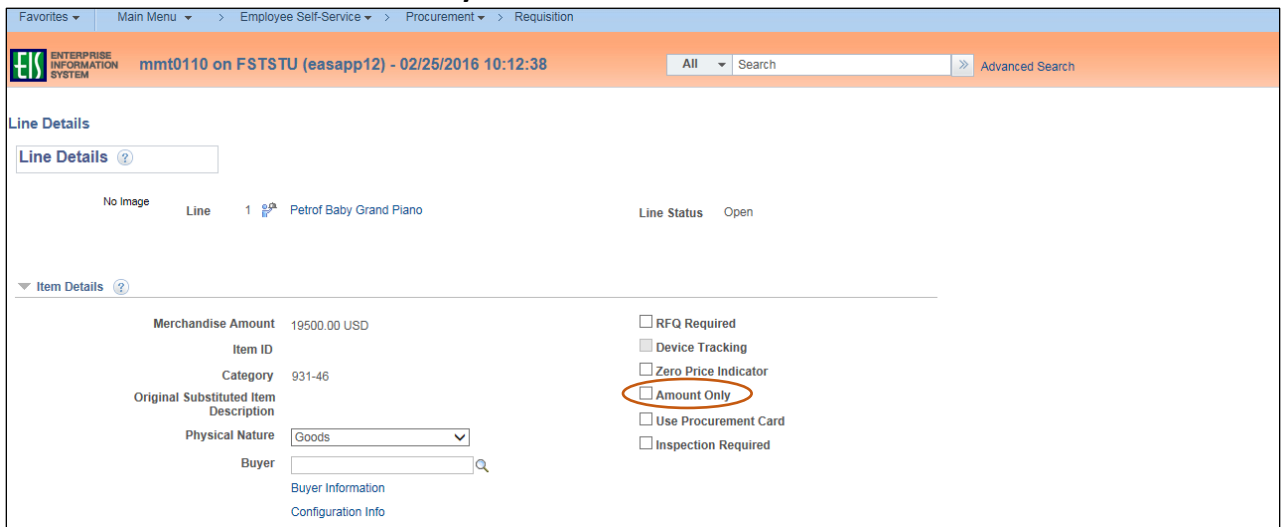
*Requester: E92200 Business Services-Gen Priority: Medium

*Currency: USD

Cart Summary: Total Amount 20,000.00 USD

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Petrof Baby Grand Piano		Metroplex Piano Inc	1.0000	Each	19500.0000	19500.00				
2	5 Year Piano Service Plan		Metroplex Piano Inc	1.0000	Each	500.0000	500.00				

13. Select the box next to **Amount Only** on the **Line Details** screen.



Line Details

Line 1 Petrof Baby Grand Piano Line Status: Open

Item Details

Merchandise Amount: 19500.00 USD

Item ID: []

Category: 931-46

Original Substituted Item Description: []

Physical Nature: Goods

Buyer: []

RFQ Required
 Device Tracking
 Zero Price Indicator
 Amount Only
 Use Procurement Card
 Inspection Required

14. Click **OK** at the bottom of the screen.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Requisition

EIS ENTERPRISE INFORMATION SYSTEM **mmt0110 on FSTSTU (easapp12) - 02/25/2016 10:12:38** All ▾ Search >> Advanced Search

Line Details

Line Details ?

No Image Line 1 Petrof Baby Grand Piano Line Status Open

Item Details

Merchandise Amount 19500.00 USD RFQ Required
Item ID Device Tracking
Category 931-46 Zero Price Indicator
Original Substituted Item Description Amount Only
Physical Nature Goods ▾ Use Procurement Card
Buyer Inspection Required
[Buyer Information](#)
[Configuration Info](#)

Contract Information

Use Contract if Available
Contract ID
[Contract Details](#)
Version
Contract Line
Category Line

Supplier Information

Supplier ID Metroplex Piano Inc
Supplier Location
[Suggest New Supplier](#)
Supplier Item ID
Supplier's Catalog

Manufacturer Information

Manufacturer ID
Manufacturer
Manufacturer's Item ID
GTIN

Sourcing Controls

Consolidate with other Reqs
 Calculate Price
 Override Suggested Supplier

Custom Fields

Custom Character 1
Custom Character 2
Custom Date
Custom Field 1
Custom Field 2
Custom Field 3
Custom Field 4

OK Cancel

15. Scroll to the **Requisition Comments and Attachments** section at the bottom of the screen.
16. Click **Add more Comments and Attachments** to use the Standard Comments feature.

Enterprise Information System | mmt0110 on FSTSTU (easapp12) - 02/22/2016 16:01:23 | All | Search | Advanced Search

Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit: SY769 | Univ. of North Texas System
 *Requester: E92200 | Business Services-Gen
 *Currency: USD
 Requisition Name: | Priority: Medium
 Custom Fields: | [Copy Bid Vendor](#) | [Delete Bid Vendors](#) | [Refresh](#)

Cart Summary: Total Amount 20,000.00 USD
 Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete																		
1	Petrot Baby Grand Piano		Metroplex Plano Inc	1.0000	Each	19500.0000	19500.00																						
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Add Shipto Comments Quantity: 1.0000 Address: UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205 Add One Time Address Price: 19500.0000 Attention To: Business Services-Gen Due Date: 02/29/2016 *Distribute By: Qty</p> <p>Accounting Lines</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Status</th> <th>Dist Type</th> <th>Location</th> <th>Quantity</th> <th>Percent</th> <th>Merchandise Amt</th> <th>GL Unit</th> <th>Entry Event</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Open</td> <td></td> <td>BSCP 400</td> <td>1.0000</td> <td>100.0000</td> <td>19,500.00</td> <td>SY769</td> <td></td> </tr> </tbody> </table>												Line	Status	Dist Type	Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event	1	Open		BSCP 400	1.0000	100.0000	19,500.00	SY769	
Line	Status	Dist Type	Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event																					
1	Open		BSCP 400	1.0000	100.0000	19,500.00	SY769																						
2	5 Year Plano Service Plan		Metroplex Plano Inc	1.0000	Each	500.0000	500.00																						
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Add Shipto Comments Quantity: 1.0000 Address: UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205 Add One Time Address Price: 500.0000 Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p>Accounting Lines</p>																													

Select All / Deselect All | Select lines to: | Add to Favorites | Add to Template(s) | Delete Selected | Mass Change

Total Amount 20,000.00 USD

Shipping Summary

Edit for All Lines

Ship To Location: BSCA 400
 Address: UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205
 Attention To: Business Services-Gen
 Comments:

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier | Show at Receipt | Shown at Voucher

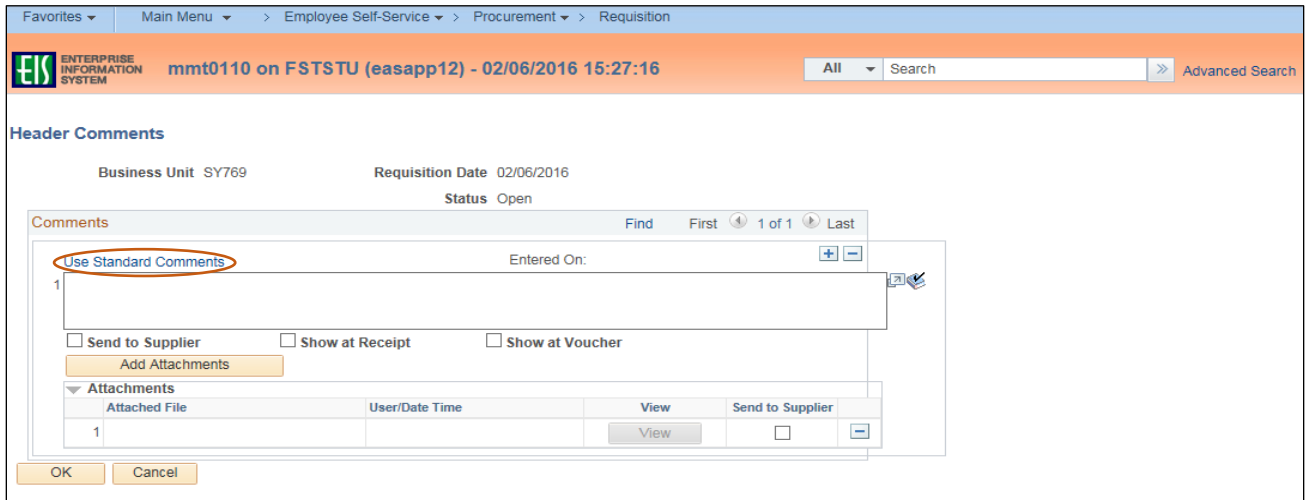
Approval Justification

Enter approval justification for this requisition

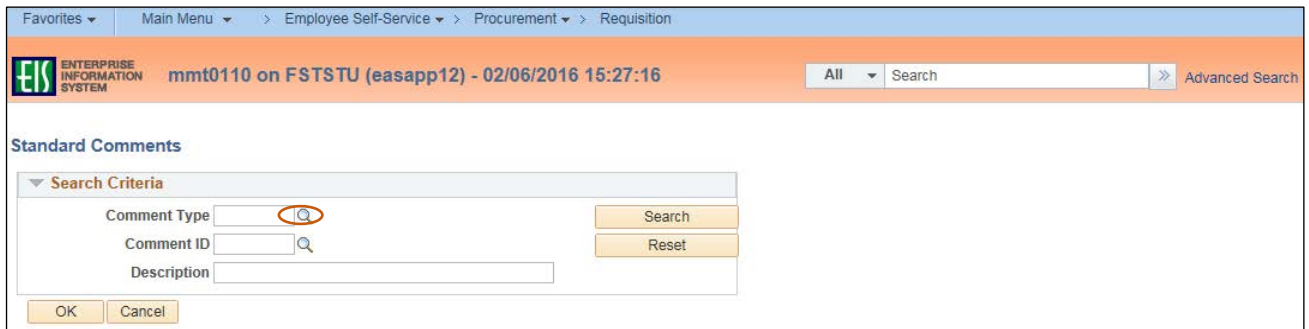
[Add more Comments and Attachments](#)

Check Budget | Pre-Check Budget | Submit | Save Before Submit | Add More Items | Preview Approvals

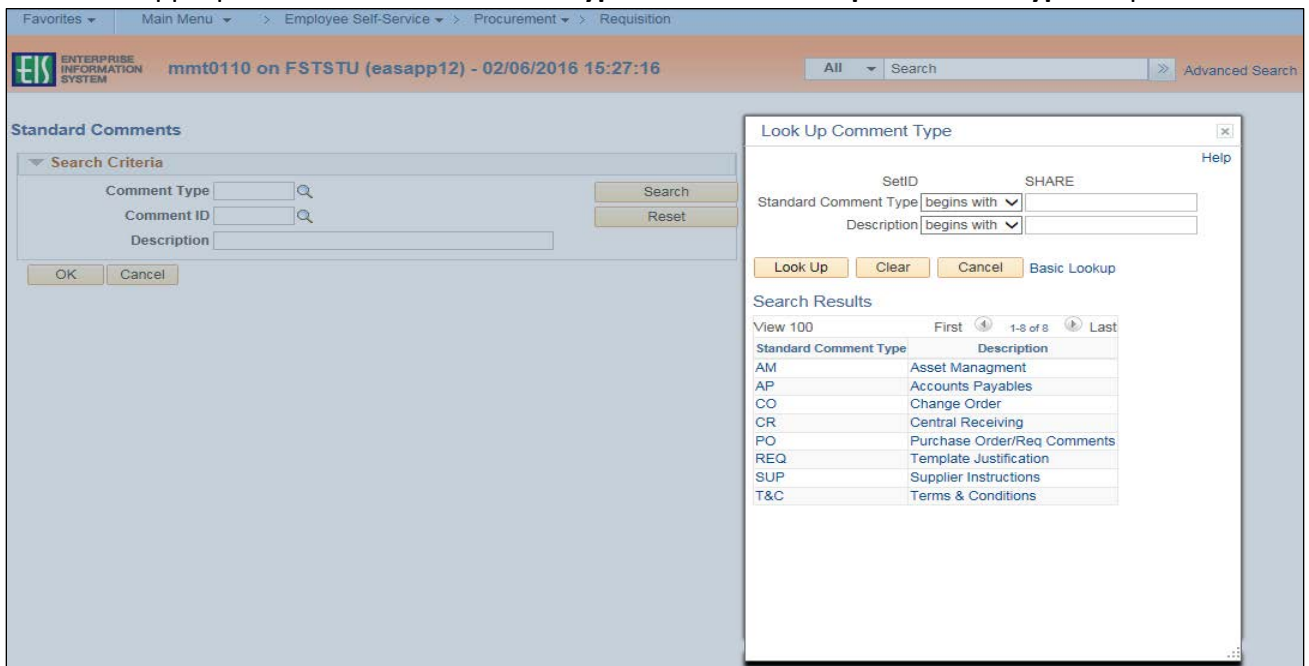
17. Click **Use Standard Comments**.



18. Click on the magnifying glass next to the **Comment Type** field.



19. Select the appropriate **Standard Comment Type** from the **Look Up Comment Type** dropdown.



20. Click on the magnifying glass next to the **Comment ID** field.

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: []

Description: []

Search, Reset, OK, Cancel

21. Select the appropriate **Standard Comment ID** from the **Look Up Comment ID** dropdown.

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: []

Description: []

Search, Reset, OK, Cancel

Look Up Comment ID

SetID: SHARE

Standard Comment Type: REQ

Standard Comment ID: begins with []

Description: begins with []

Look Up, Clear, Cancel, Basic Lookup

Search Results

View 100 First 1 of 1 Last

Standard Comment ID	Description
JUST	Req Comments Justification

22. Click **OK**.

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: JUST

Description: []

Search, Reset, OK, Cancel

Note: The available comment options will be displayed in the **Standard Comments** section.

The screenshot shows the 'Standard Comments' section of the EIS system. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Employee Self-Service', 'Procurement', and 'Requisition'. Below this is the EIS logo and the text 'ENTERPRISE INFORMATION SYSTEM' followed by 'mmt0110 on FSTSTU (easapp12) - 02/06/2016 15:27:16'. A search bar contains 'All' and 'Search', with an 'Advanced Search' link. The 'Standard Comments' section has a 'Search Criteria' box with 'Comment Type' set to 'REQ', 'Comment ID' set to 'JUST', and a 'Description' field. There are 'Search' and 'Reset' buttons. Below this is a table of 'Standard Comments' with columns for 'Select', 'Comment Type', 'REQ', and 'Comment ID', 'JUST'. The table contains one row with a checkbox, a description, and a justification. The description is: 'Department Contact: Full name, full phone number and email address; Vendor Contact: Full name, full phone number, fax number and email address; Special Instructions: Include any special shipping, payment or deadlines; Attachments: Refer to any attachments such as contracts or quotes; Purpose: Advise how this purchase will be used, what benefit is gained'. Below the table are radio buttons for 'Append To Comments' and 'Override Comments', and 'OK' and 'Cancel' buttons.

23. Click the box next to the appropriate standard comment option to make your selection.

24. Click **OK**.

This screenshot is identical to the one above, but the checkbox in the 'Standard Comments' table is now checked, indicating that the user has selected this comment option.

25. Recall the [CAP-IT](#) guidelines when providing detailed information in the **Standard Comments** box, which is now populated with helpful comment prompts.
Note: The items listed in the table below require additional information to be provided in the **Requisition Comments and Attachments** section of the requisition. See [Procurement Guide](#) for additional instructions. Reference any existing contracts or purchasing cooperatives used.

Advertisements	Animals	Blanket Purchase Orders
Branding/Logo Items	Contributions	Controlled Items
Controlled Substances	Direct Publications	Flowers, Floral Arrangements & Plants
Food and Beverage	Foreign Nationals	Gifts, Gratuities and Honorariums
Hazardous Materials	Hosted Events	License Fees
Memberships	Moving Expense/Relocation	Notary Fees
Prepayments	Promotional Items	Radioactive Materials
Registration Fees	Sponsorship, Community Service & Community Support	Subscription of Print Materials
Telecommunication Equipment	Temporary Personnel	Tips
Training and Development	Vehicles	Visa Fees

26. Click **OK**.

27. Scroll to the **Approval Justification** section at the bottom of the screen.

Note: A business justification is necessary for every purchase, and should answer these questions as it pertains to the department and the purchase. The comment entered in this section should explain

- Why this purchase is being made?
- What is the purpose of the purchase?
- Who in the department is this purchase for?

28. Enter **Approval Justification** comments that meet the defined criteria, and any other information that may be needed by the requisition approver.

Requisition Comments and Attachments

Enter requisition comments

Dept. Contact: Karen James | Contact Phone: 940-555-5555 | Contact Email: karenjames@unt.edu
Special Instructions: Please email the address above when the order ships
Attachments: Refer to any attachments such as contracts or quotes

Send to Supplier Show at Receipt Shown at Voucher [Edit more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

[Check Budget](#) [Pre-Check Budget](#)

[Submit](#) [Save Before Submit](#) [Add More Items](#) [Preview Approvals](#)

29. Click **Save Before Submit** at the bottom of the screen.

[Favorites](#) | [Main Menu](#) | [Employee Self-Service](#) | [Procurement](#) | [Requisition](#)

ENTERPRISE INFORMATION SYSTEM | mmt0110 on FSTSTU (easapp12) - 02/25/2016 10:12:38 | All | Search | [Advanced Search](#)

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) | [Requisition Settings](#)

Requisition Summary

Business Unit: SY769 | Univ. of North Texas System | Requisition Name: _____
 *Requester: E92200 | Business Services-Gen | Priority: Medium
 *Currency: USD

[Copy Bid Vendor](#)
[Delete Bid Vendor](#)
[Refresh](#)

[Custom Fields](#)

Cart Summary: Total Amount 20,000.00 USD
[Add More Items](#)

Expand lines to review shipping and accounting details.

[First](#) | [Last](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Petrof Baby Grand Piano		Metroplex Piano Inc	1.0000	Each	19,500.00000	19500.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Add ShipTo Comments Quantity: 1.0000</p> <p>Address: UNT System Business Service Center Add One Time Address Price: 19500.0000</p> <p>Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205</p> <p>Attention To: Business Services-Gen</p> <p>Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
2	5 Year Piano Service Plan		Metroplex Piano Inc	1.0000	Each	500.0000	500.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Add ShipTo Comments Quantity: 1.0000</p> <p>Address: UNT System Business Service Center Add One Time Address Price: 500.0000</p> <p>Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205</p> <p>Attention To: Business Services-Gen</p> <p>Due Date: 02/29/2016</p> <p>Accounting Lines</p>											

Select All / Deselect All |
 Select lines to: [Add to Favorites](#) | [Add to Template\(s\)](#) | [Delete Selected](#) | [Mass Change](#)

Total Amount 20,000.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location: BSCA 400
 Address: UNT System Business Service Center
 Send to: invoices@untssystem.edu
 1112 Dallas Dr., Ste. 4000
 Denton, TX 76205
 Attention To: Business Services-Gen
 Comments:

Requisition Comments and Attachments

Enter requisition comments

Dept. Contact: Karen James | Contact Phone: 940-555-5555 | Contact Email: karenjames@unt.edu
 Special Instructions: Please email the address above when the order ships
 Attachments: Refer to any attachments such as contracts or quotes

Send to Supplier | Show at Receipt | Shown at Voucher | [Edit more Comments and Attachments](#)


Approval Justification

Enter approval justification for this requisition

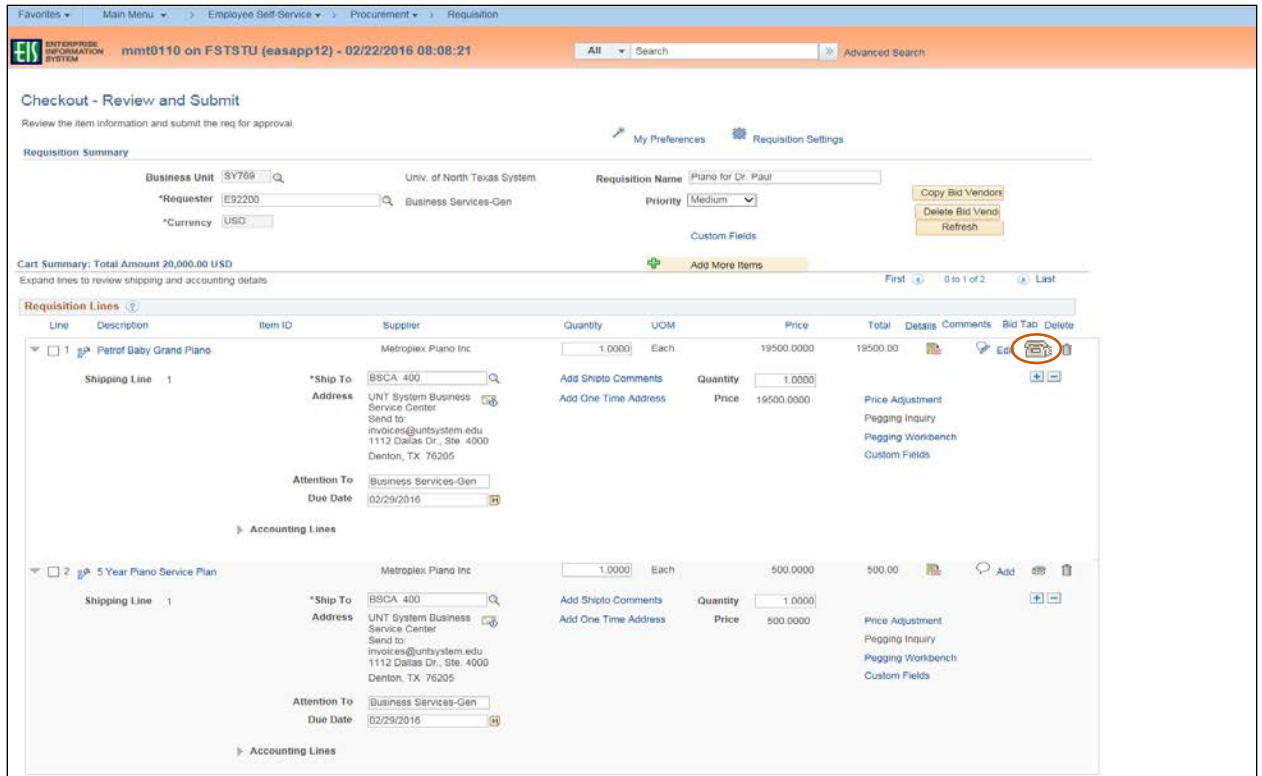
The purchase of this specialty piano will allow Professor Paul to complete and perform the composition of a concert which could result in grants and national recognition for the UNT System.

[Check Budget](#) | [Pre-Check Budget](#)

[Submit](#) | [Save Before Submit](#) | [Add More Items](#) | [Preview Approvals](#)

30. Click on the Telephone icon  located next to the **Comment** icon to complete the **Bid Tab** for each of the vendor quotes received.

Note: Bid Tab only needs to be completed for Line 1.



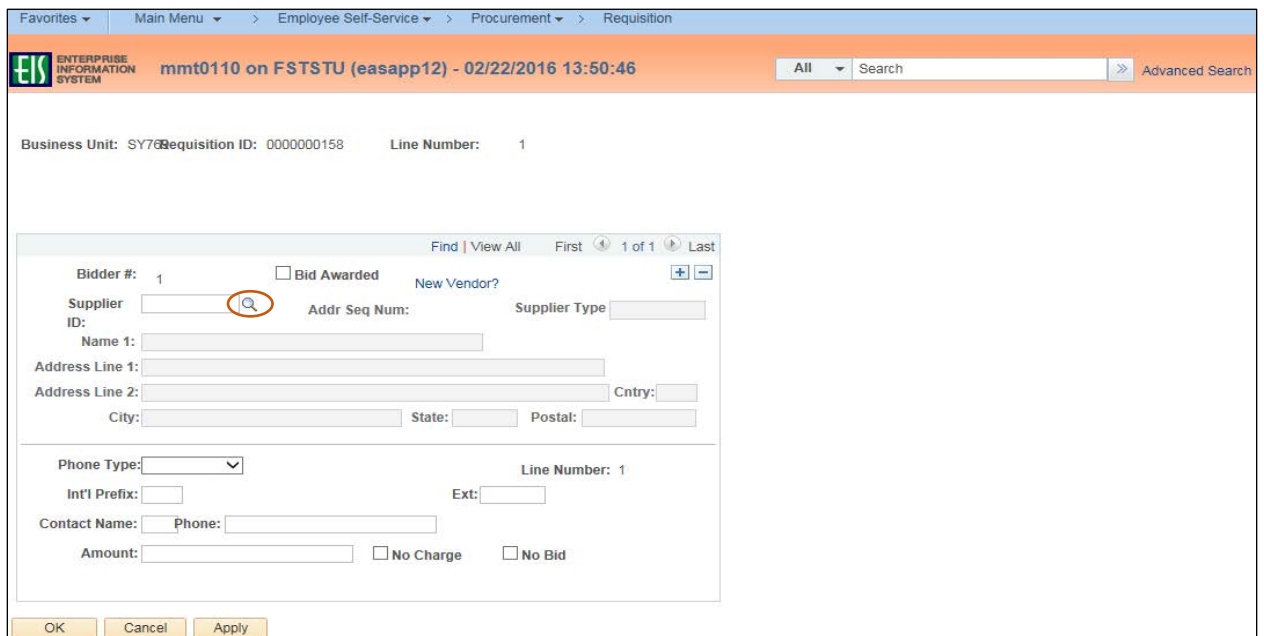
The screenshot shows the 'Checkout - Review and Submit' page for requisition mmt0110. The 'Requisition Summary' section includes fields for Business Unit (SY769), Requisition Name (Piano for Dr. Paul), and Priority (Medium). Below this is a table of 'Requisition Lines' with two entries:

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Petref Gabby Grand Piano		Metroplex Piano Inc	1.0000	Each	19500.0000	19500.00				
2	5 Year Piano Service Plan		Metroplex Piano Inc	1.0000	Each	500.0000	500.00				

Note: If you are using a Suggested Supplier skip to step 33.

31. Click on the magnifying glass next to the **Supplier ID** field.

32. Skip to step 37.



The screenshot shows the 'Bidder Information' form for Bidder # 1. The 'Supplier ID' field has a magnifying glass icon next to it, which is circled in red. Other fields include Name 1, Address Line 1, Address Line 2, City, State, Postal, Phone Type, Int'l Prefix, Ext, Contact Name, and Phone. There are also checkboxes for 'Bid Awarded', 'New Vendor?', 'No Charge', and 'No Bid'.

33. Click the link labeled **New Vendor?**.
34. Enter information for the new vendor in the fields that follow, including **Name 1, Address, Phone Type, Contact Name, Phone, and Amount.**
35. Click **OK.**
36. Skip to step 41.

37. Enter Supplier name in the **Name 1** field.
38. Click **Look Up.**

Supplier ID	Name 1	Open For Ordering	Supplier Type	Default Location	Address Sequence Number	Postal Code
000000001	UNT Payroll	Y	(blank)	999	1	76203-0000
000000003	ATHLETIC DEPT W/KNIG FUND	Y	(blank)	999	1	76203-0000
000000004	Delta Sigma Theta Sorority, Inc.	Y	(blank)	000	1	76203
000000005	Zeta Phi Beta	Y	(blank)	999	1	76206
000000006	Model International Org	Y	(blank)	999	1	76203
000000017	Tagliamonte, Sali A	Y	(blank)	000	1	M48 1M2
000000024	Beta Alpha Phi-UNT Chapter	Y	(blank)	999	1	76203 5219
000000029	NABA - UNT Student Chapter	Y	(blank)	888	2	76203-5219
000000038	Computers Etc	Y	(blank)	001	1	75112
000000040	Test Vendor 1	N	(blank)	001	1	76201
000000041	Learn'ng Inc.	Y	(blank)	TX	1	77777
000000044	UNT SY769	Y	(blank)	000	1	76205
000000045	UNT NT752	Y	(blank)	000	1	76205
000000046	UNT DL773	Y	(blank)	000	1	75241
000000047	UNT H5763	Y	(blank)	000	1	76107
000000048	eaaw144-Testing	Y	(blank)	1	1	TESTEAW
000000049	Sun Electronic Systems Inc.	Y	(blank)	000	1	32780
000000050	eaaw144-TINS TEST	Y	(blank)	000	1	76226
000000051	tins interface test 2	Y	(blank)	000	1	76226
000000052	Bryon, Michael J	Y	(blank)	000	1	63112
000000056	Alpha Delta Pi	Y	(blank)	000	2	70623
000000066	Phi SIGMA Pi	Y	(blank)	000	1	76209
000000067	Zeta Tau Alpha	Y	(blank)	999	1	76201
000000069	Phi KAPPA SIGMA	Y	(blank)	000	2	76201
000000093	Alpha Phi Sorority	Y	(blank)	999	1	76203
000000102	Eoen Travel International Limited	Y	(blank)	000	1	NW4 1B2
000000123	SIGMA LAMBDA BETA	Y	(blank)	999	1	76201
000000148	Feminist Majority Leadership Alliance	Y	(blank)	000	5	76201
000000184	UNT Phanhalems	Y	(blank)	999	1	76203
000000200	Wells Fargo	Y	(blank)	007	1	76201
000000204	PSP VACUUM TECHNOLOGY	Y	(blank)	000	1	SK110LR
000000230	University of Memphis	Y	(blank)	000	1	38152
000000036	Alpha Phi	Y	(blank)	000	3	76203
000000245	World Echoes	N	(blank)	999	2	76201

39. Select the appropriate **Supplier ID** from **Search Results** – confirming the **Postal Code** is correct.
Note: If the appropriate **Name 1** does not appear in the **Search Results**, click **Cancel**. Enter **Name** and **Address** on the **Bid Tab** screen.

Business Unit: SY76 Requisition ID: 000000158 Line Number: 1

Look Up Supplier ID

SetID: SHARE

Supplier ID: begins with

Name 1: begins with metroplex piano

Default Location: begins with

Address Sequence Number: =

Postal Code: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Supplier ID	Name 1	Open For Ordering	Supplier Type	Default Location	Address Sequence Number	Postal Code
0000065733	Metroplex Piano Inc	Y	(blank)	000	1	75243

40. Enter **Contact Name** and **Phone**.

41. Enter the bid or quote amount received from vendor in the **Amount** field.

Business Unit: SY76 Requisition ID: 000000158 Line Number: 1

Bidder #: 1 Bid Awarded New Vendor?

Supplier ID: 0000065733 Addr Seq Num: 1 Supplier Type

Name 1: Metroplex Piano Inc

Address Line 1: 9292 LBJ Frwy

Address Line 2: Cntry: USA

City: Dallas State: TX Postal:

Phone Type: Business Line Number: 1

Int'l Prefix: Ext:

Contact Name: Kare Phone: 940-555-5555

Amount: 20,000.00 No Charge No Bid

OK Cancel Apply

42. Click on + to add a new bid.
43. Repeat steps 31 - 41 for each bid.
44. Click on box next to **Bid Awarded** (the bid selected), **No Charge** (the vendor is providing the item for free), or **No Bid** (the vendor did respond) as applicable.
Note: Supplier Type automatically populates if identified as HUB supplier.
45. Click **OK**.

Favorites > Main Menu > Employee Self-Service > Procurement > Requisition
EIS ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/22/2016 13:50:46

Business Unit: SY76 Requisition ID: 0000000158 Line Number: 1

Bidder #: 1 Bid Awarded New Vendor? + -

Supplier ID: 0000065733 Addr Seq Num: 1 Supplier Type:

Name 1: Metroplex Piano Inc

Address Line 1: 9292 LBJ Frwy

Address Line 2: Cntry: USA

City: Dallas State: TX Postal:

Phone Type: Business Line Number: 1

Int'l Prefix: Ext:

Contact Name: Kare Phone: 940/555-5555

Amount: 20000.000 No Charge No Bid

Bidder #: 2 Bid Awarded New Vendor? + -

Supplier ID: 0000022760 Addr Seq Num: 1 Supplier Type:

Name 1: Woods & Son Piano

Address Line 1: 14929 Harrison Street

Address Line 2: Cntry: USA

City: Brighton State: CO Postal: 75931

Phone Type: Business Line Number: 1

Int'l Prefix: Ext:

Contact Name: Ken Phone: 214/555-5555

Amount: 19000.000 No Charge No Bid

Bidder #: 3 Bid Awarded New Vendor? + -

Supplier ID: 0000022757 Addr Seq Num: 2 Supplier Type:

Name 1: Collora Piano

Address Line 1: 1451 Wycliff Ave

Address Line 2: Cntry: USA

City: Dallas State: TX Postal:

Phone Type: Business Line Number: 1

Int'l Prefix: Ext:

Contact Name: Kelly Phone: 469/555-5555

Amount: No Charge No Bid

OK Cancel Apply

46. Click on the triangle icon next to **Accounting Lines**.

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Procurement](#) > [Requisition](#)

ENT ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/22/2016 13:50:46 All Search >> Advanced Search

Checkout - Review and Submit
 Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit: SY769 Univ. of North Texas System Requisition Name: Piano for Dr. Paul
 *Requester: E92200 Business Services-Gen Priority: Medium [Copy Bid Vendors](#)
 *Currency: USD [Refresh](#)
 Custom Fields

Cart Summary: Total Amount 20,000.00 USD [Add More Items](#)

Expand lines to review shipping and accounting details First 0 to 1 of 2 Last

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Petrof Baby Grand Piano		Metroplex Plano Inc	1.0000	Each	19500.0000	19500.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Add Shipto Comments Quantity: 1.0000</p> <p>Address: UNT System Business Service Center Add One Time Address Price: 19500.0000</p> <p>Send to: invoices@untsystem.edu 1112 Dallas Dr., Ste. 4000 Price Adjustment</p> <p>Denton, TX 76205 Custom Fields</p> <p>Attention To: Business Services-Gen</p> <p>Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
2	5 Year Piano Service Plan		Metroplex Plano Inc	1.0000	Each	500.0000	500.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Add Shipto Comments Quantity: 1.0000</p> <p>Address: UNT System Business Service Center Add One Time Address Price: 500.0000</p> <p>Send to: invoices@untsystem.edu 1112 Dallas Dr., Ste. 4000 Price Adjustment</p> <p>Denton, TX 76205 Custom Fields</p> <p>Attention To: Business Services-Gen</p> <p>Due Date: 02/29/2016</p> <p>Accounting Lines</p>											

47. Review expense detail for accuracy in **Chartfields 1** and **Chartfields 2** in the **Accounting Lines** section by clicking on the appropriate tab.

48. Make changes as needed to ensure accuracy of expenditure codes.

Note: Do not change **Account** or **Alt Acct** here. These fields are controlled by the **Category** code. Make those changes at the level step. Also, once the requisition is approved you will no longer be able to make changes to the **Accounting Lines**.

The screenshot shows the 'Checkout - Review and Submit' page for requisition mmt0110. The 'Accounting Lines' section is circled in red. It contains a table with the following data:

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		BSCP 400	1.0000	100.0000	19,500.00	SY769	

Chartfields 1

Accounting Lines								Personalize	Find	View All	First	1 of 1	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information							
Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event					
1	Open		BSCP 400	1.0000	100.0000	1,000.00	SY769						

Chartfields 2

Accounting Lines														Personalize	Find	View All	First	1 of 1	Last
Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate						
53101	7334	922000	105	195001	550														

49. Follow steps 50-52 to split the expense between multiple funding sources. If you do not need to do this, skip to step 1 in the section **Reviewing Budget and Approvals and Submitting the Requisition.**

50. Click on the blue plus sign **+** at the end of **Chartfields 1.**

Accounting Lines										Personalize	Find	View All	First	1 of 1	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information									
Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event							
1	Open		BSCP 400	1.0000	100.0000	500.00	SY769			+ -					

51. Distribute funding based on the quantity or percentage of the line amount.

Accounting Lines										Personalize	Find	View All	First	1-2 of 2	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information									
Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event							
1	Open		BSCP 400	1.0000	100.0000	500.00	SY769			+ -					
2	Open		BSCP 400	0.0000		0.00	SY769			+ -					

52. Click on the **Chartfields 2.**

Accounting Lines										Personalize	Find	View All	First	1-2 of 2	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information									
Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event							
1	Open		BSCP 400	0.5000	50.0000	250.00	SY769			+ -					
2	Open		BSCP 400	0.5000	50.0000	250.00	SY769			+ -					

53. Make changes to the newly created distribution lines, as needed.

Accounting Lines														Personalize	Find	View All	First	1-2 of 2	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information													
Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate						
53104	7378	922000	105	195001	550										+ -				
53104	7378	922000	105	195001	550										+ -				

Reviewing Budget and Approvals and Submitting the Requisition

Requisition Budget and Approvals must be reviewed before submission. Follow the steps below to ensure the requisition is correct before submitting.

1. Click **Pre-Check Budget** to conduct a pre-budget check, which verifies the availability of funds without encumbering the funds.

Note: If your requisition does not pass the **Pre-Check Budget**, contact the budget office, if your requisition does pass, move on to step 2.

The screenshot shows a web form titled "Approval Justification". At the top, it says "Enter approval justification for this requisition". Below this is a text area containing the text: "The purchase of this specialty piano will allow Professor Paul to complete and perform the composition of a concert which could result in grants and national recognition for the UNT System." At the bottom of the form, there are several buttons: "Check Budget", "Pre-Check Budget" (circled in red), "Submit", "Save Before Submit", "Add More Items", and "Preview Approvals".

2. Click **Check Budget** to conduct an official budget check.


The screenshot shows the same "Approval Justification" form. The "Check Budget" button is now circled in red. The "Pre-Check Budget" button is no longer visible. The status "Budget Checking Status Provisionally Valid" is displayed in green text. The other buttons remain the same.


3. Click **Preview Approvals**.

The screenshot shows the same "Approval Justification" form. The "Preview Approvals" button is now circled in red. The status "Budget Checking Status Valid" is displayed in green text. The other buttons remain the same.

- Review the **Preview Approvals** screen to ensure the requisition will be routed to the correct Approver for **UNTS Department Approval**.

Note: If the requisition is set to route to the correct Approver, move on to step 13. If the requisition is not set to route to the correct Approver, follow steps 5-11 to ad hoc to the appropriate Approver.

- Click the green plus symbol  to add an Approver.



Note: You may add an Approver to the front or end of the workflow by clicking the  before or after the existing Approver.

Preview Approvals




Requested For Business Services-Gen Number of Lines 2
 Requisition Name 0000000162 Total Amount 20,000.00 USD



Business Unit SY769
 Status Open
 Priority Medium
 Budget Status Not Checked

Approval Justification
 The purchase of this specialty piano will allow Professor Paul to complete and perform the composition of a concert which could result in grants and national recognition for the UNT System.



Purchasing Approval
 Requisition 0000000162:Initiated 
 UNTS Buyer Approval
 Not Routed
 Multiple Approvers Purchasing Approval 



UNTS Dept ID - ePro

Line 1:Initiated 
 Petrof Baby Grand Piano
 UNTS Department Approval
 Not Routed
 Asher, Donna Brooks Manager Fiduciary Approval  

Line 2:Initiated 
 5 Year Piano Service Plan
 UNTS Department Approval
 Not Routed
 Asher, Donna Brooks Manager Fiduciary Approval 

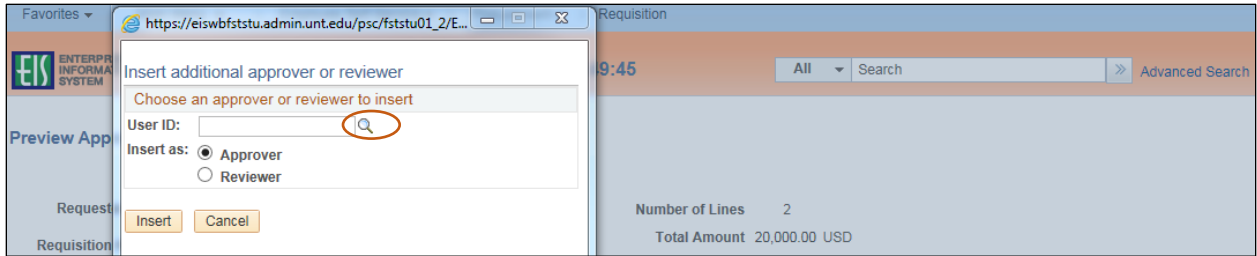
Purchasing Manager Approval

Line 1:Initiated 
 Petrof Baby Grand Piano
 Purchasing Manager Approval
 Not Routed
 Saxon, Randall J ePRO PURCHASE MGR APPRVL ALL 

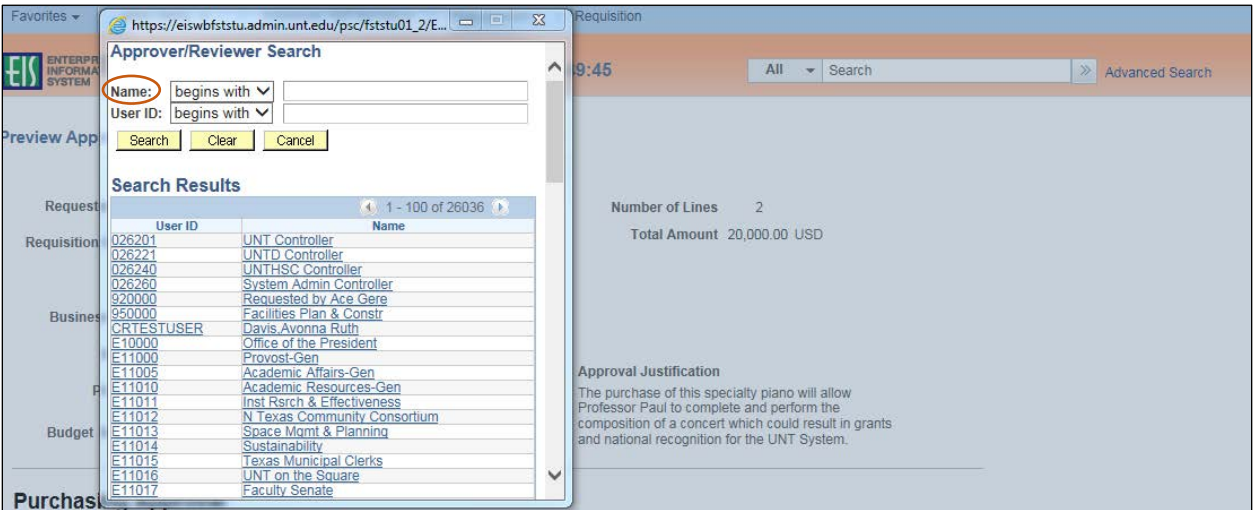
Line 2:Initiated 
 5 Year Piano Service Plan
 Purchasing Manager Approval
 Not Routed
 Saxon, Randall J ePRO PURCHASE MGR APPRVL ALL 

Return Apply Approval Changes

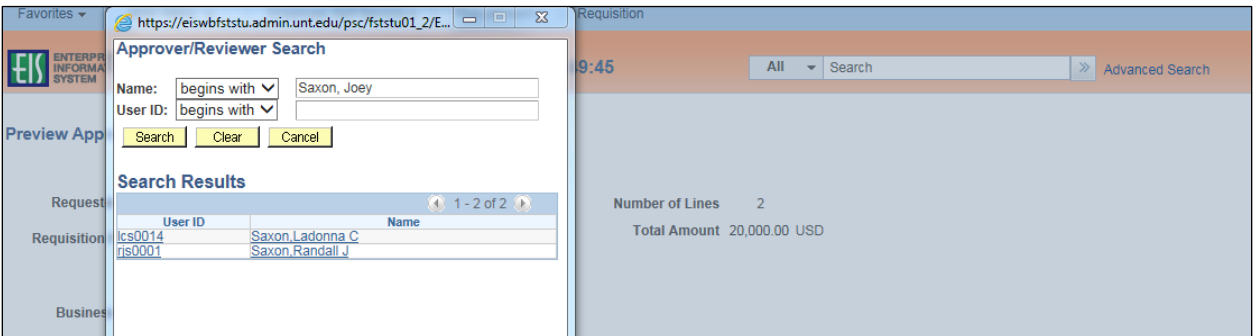
- Click on the magnifying glass beside the blank **User ID** field.



- Enter a full or partial name (Last Name, First Name) into the **Name** field.
- Click **Search**.

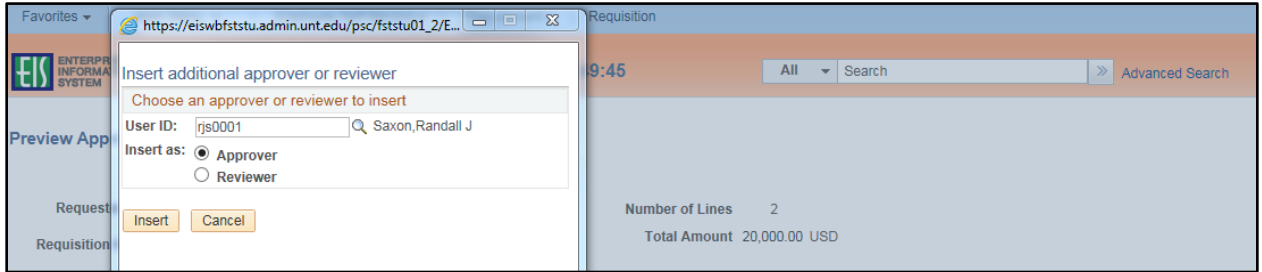


- Select the appropriate **Name** or **User ID** for the Approver you want to insert.



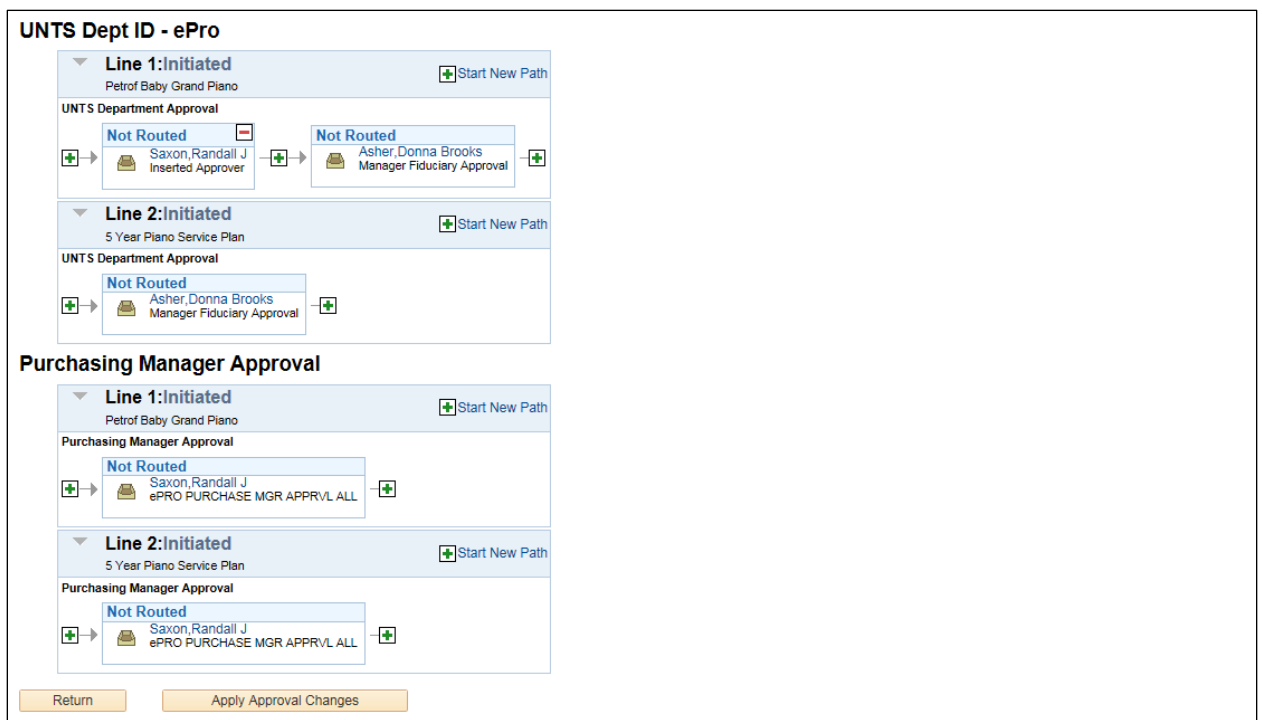
10. Click **Insert**.

Note: If you would like to insert someone as a Reviewer of the requisition instead of the as an Approver, select the **Reviewer** option.



11. Click **Apply Approval Changes**.

12. Repeat steps 5-11 for each additional Approver or Reviewer you need to add.



14. Click **Submit**.

Favorites - Main Menu - Employee Self-Service - Procurement - Requisition

ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/23/2016 09:49:45 All Search Advanced Search

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: SY769 Univ. of North Texas System Requisition Name: 0000000162
 Requester: E92200 Business Services-Cen Requisition ID: 0000000162
 *Currency: USD Priority: Medium
 Copy Bid Vendor Delete Bid Vendor Refresh

Cart Summary: Total Amount 20,000.00 USD Add More Items

Expand lines to review shipping and accounting details First 1 to 2 of 2 Last

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Petrol Baby Grand Piano		Metroplex Piano Inc	1.0000	Each	19500.0000	19500.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Address: UNT System Business Service Center Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205 Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
2	5 Year Piano Service Plan		Metroplex Piano Inc	1.0000	Each	500.0000	500.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Address: UNT System Business Service Center Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205 Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p>Accounting Lines</p>											

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 20,000.00 USD
 Pre-Encumbrance Balance Not Available

Shipping Summary

Edit for All Lines

Ship To Location: BSCA 400
 Address: UNT System Business Service Center
 Send to: invoices@untssystem.edu
 1112 Dallas Dr., Ste. 4000
 Denton, TX 76205
 Attention To: Business Services-Gen
 Comments:

Requisition Comments and Attachments

Enter requisition comments

Dept. Contact: Karen James | Contact Phone: 940-555-5555 | Contact Email: karenjames@unt.edu
 Special Instructions: Please email the address above when the order ships
 Attachments: Refer to any attachments such as contracts or quotes

Send to Supplier Show at Receipt Shown at Voucher Edit more Comments and Attachments

Approval Justification

Enter approval justification for this requisition

The purchase of this specialty piano will allow Professor Paul to complete and perform the composition of a concert which could result in grants and national recognition for the UNT System.

Check Budget Pre-Check Budget Budget Checking Status: Valid

Submit Save Before Submit Add More Items Preview Approvals

15. Review the **Confirmation** screen.

Enterprise Information System (EIS) mmt0110 on FSTSTU (easapp12) - 02/23/2016 09:49:45

Confirmation

Your requisition has been submitted.

Requested For	Business Services-Gen	Number of Lines	2
Requisition Name	000000162	Total Amount	20,000.00 USD
Requisition ID	000000162	Pre-Encumbrance Balance	Not Available
Business Unit	SY769	Approval Justification	The purchase of this specialty piano will allow Professor Paul to complete and perform the composition of a concert which could result in grants and national recognition for the UNT System.
Status	Pending		
Priority	Medium		
Budget Status	Valid		

[View printable version](#)
 [Edit This Requisition](#)
 [Check Budget](#)
 [Pre-Check Budget](#)

Purchasing Approval

Requisition 000000162: Pending [Start New Path](#)

UNTS Buyer Approval

Pending

Multiple Approvers Purchasing Approval [+](#)

UNTS Dept ID - ePro

Line 1: Initiated [Start New Path](#)

Petrof Baby Grand Piano

UNTS Department Approval

Not Routed [-](#)

Saxon, Randall J
Inserted Approver [+](#)

Not Routed [-](#)

Asher, Donna Brooks
Manager Fiduciary Approval [+](#)

Line 2: Initiated [Start New Path](#)

5 Year Piano Service Plan

UNTS Department Approval

Not Routed [-](#)

Asher, Donna Brooks
Manager Fiduciary Approval [+](#)

Purchasing Manager Approval

Line 1: Initiated [Start New Path](#)

Petrof Baby Grand Piano

Purchasing Manager Approval

Not Routed [-](#)

Saxon, Randall J
ePRO PURCHASE MGR APPRVL ALL [+](#)

Line 2: Initiated [Start New Path](#)

5 Year Piano Service Plan

Purchasing Manager Approval

Not Routed [-](#)

Saxon, Randall J
ePRO PURCHASE MGR APPRVL ALL [+](#)

Apply Approval Changes

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

Note: The **Manage Requisitions** feature in EIS will allow you to

- track the requisition process using the **Request Lifespan**,
- edit the requisition,
- cancel the requisition,
- re-open the requisition,
- complete **Desktop Receiving**, and
- complete a change request.

For instructions on using the **Manage Requisitions** feature in EIS [click here](#).