

SOP #: 4.2.3.1	Area: Purchasing
Title: Purchases Over \$25,000.00	Effective Date: 03-01-2016
Version #: 1.0	Revision Date: N/A
Approval Date: 02-27-2016	Review Date: N/A

Title: Purchases Over \$25,000.00


Purchase transactions over \$25,000.00 require formal bids. UNT System Procurement Services is responsible for soliciting formal bids once an approved requisition, with a Request for Formal Solicitation form attached, is received in good order.

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. Complete [Request for Formal Solicitation](#) form, providing the scope of work and product/service specifications.
2. Enter **EUID** and **Password**.
3. Click **Sign In**.

UNIVERSITY OF NORTH TEXAS SYSTEM



Enterprise Information System

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.

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

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

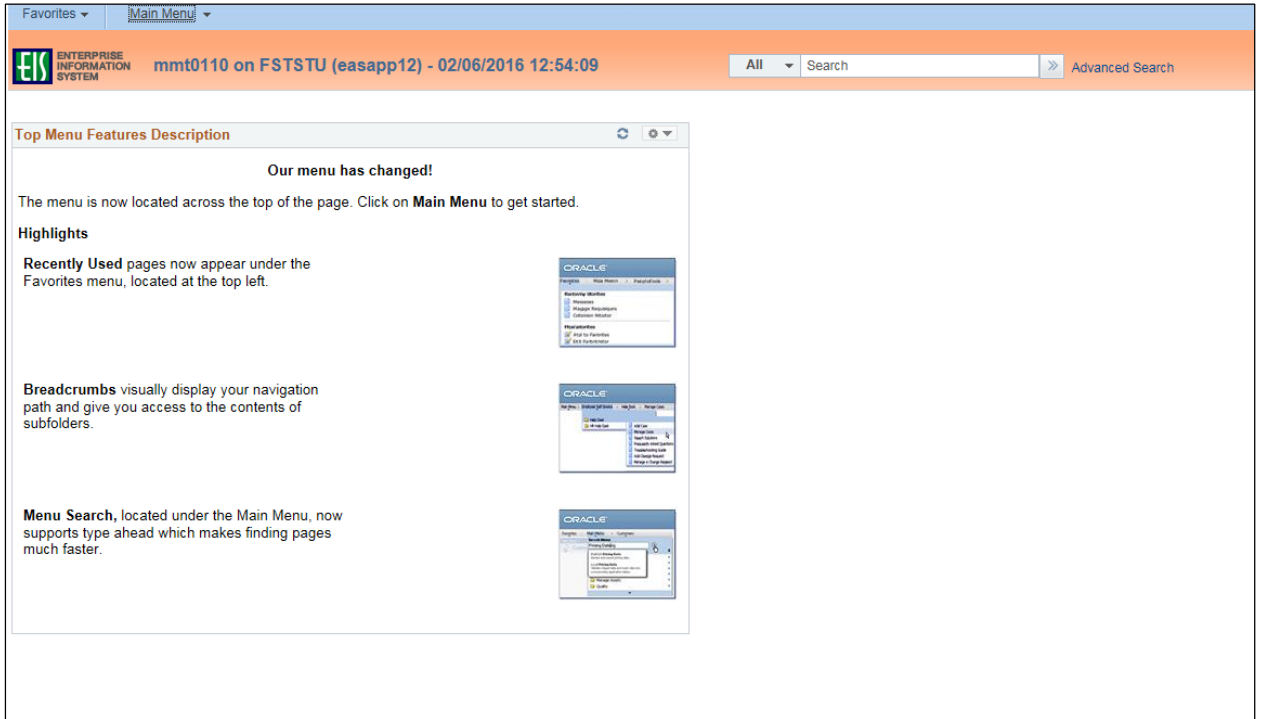
Note: Internet Explorer's Compatibility Mode is unsupported in EIS. Turn off this feature in Internet Explorer under Tools > Compatibility Mode Settings.

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

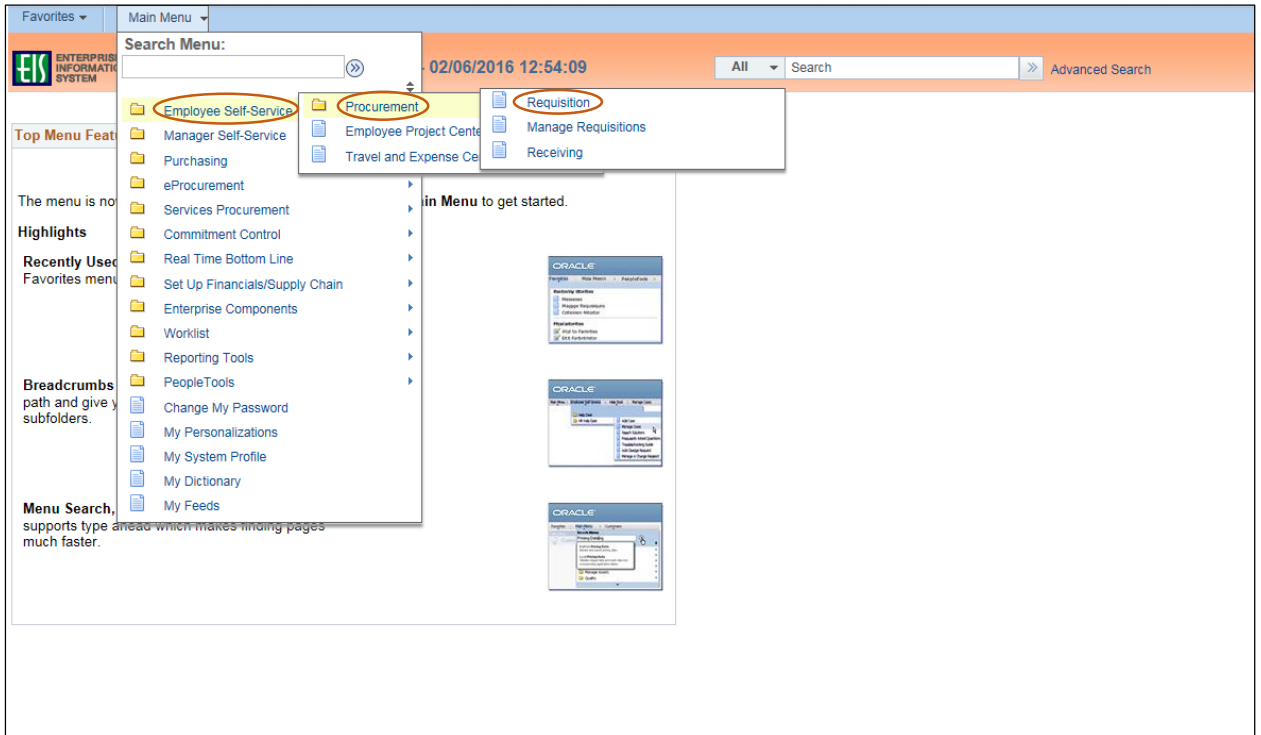
Some documents inside EIS are in PDF format and require the free [Adobe Reader](#) software to open.

[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.



6. Verify that the information in the **Business Unit** and **Requester** fields is correct.
Note: Supplier information should not be completed as the vendor will be selected based on the formal bid process conducted by Procurement Services.

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					

7. 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: Pipe Organ for Dr. Tunner

*Requester: E92200 Business Services-Gen Priority: Medium

*Currency: USD

8. Click on the magnifying glass next to **Fund Cat**.
Note: **Account** and **Alt Acct** should remain blank. These fields will be completed later.

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

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

The screenshot shows the 'Requisition Settings' page in the EIS system. The 'Accounting Defaults' section is visible, showing a table with columns for Dist, Percent, Location, GL Unit, Account, Alt Acct, Dept, Fund Cat, Fund, and Function. The 'Fund Cat' column has a dropdown menu open, displaying a list of fund categories. The dropdown is titled 'Look Up Fund Cat' and includes search filters for SetID (SHARE), Fund Category (begins with), and Description (begins with). The search results list various fund categories such as 'Educational & General', 'Auxiliary', 'Designated Operating-Managed', etc.

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

This is a close-up view of the 'Accounting Defaults' table. The table has columns for Dist, Percent, Location, GL Unit, Account, Alt Acct, Dept, Fund Cat, Fund, Function, PC Bus Unit, and Proj. The 'Fund' column contains the value '200' and has a magnifying glass icon next to it, which is circled in red. The table also includes search icons for each column.

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

The screenshot shows the EIK Enterprise Information System interface. The main window displays 'Requisition Settings' for Business Unit SY769, Requester E92200, and Requisition Name Pipe Organ. The 'Look Up Fund' window is open, showing a search for 'SHARE' with results for various funds and descriptions. The search results list includes:

Fund	Description
100003	DepOp/QEnd-Majorie Wilson Orgn
100004	DepOp/QEnd-Schl Of Visual Arts
100005	DepOp/QEnd-Unrest Gift fund
100007	DepOp/QEnd-Getty Musical Art
100008	DepOp/QEnd-L Murchison Tutor
100009	DepOp/QEnd-Prsdnt's Crmstron
100013	DepOp/QEnd-Chas.H.Fleming Trst
100015	DepOp/QEnd-Everett Foundation
100017	DepOp/QEnd-Trip-Onstead Inst
100021	DepOp/QEnd-Rbt Fn Rsv Ser 1999
100022	DepOp/QEnd-Rbt Fn Rsv Ser 199
100023	DepOp/QEnd-Rev Fin Sys Ser 05
100024	DepOp/QEnd-Employee Ben Prg
100025	DepOp/QEnd-Unt Hith Self Ins
100026	DepOp/QEnd-Journalism Pr Endow
100027	DepOp/QEnd- Lone Star Chair
100028	DepOp/QEnd-UNT Quasi Endow
130001	Schol/QEnd-General Univ
130002	Schol/QEnd-Decker
130003	Schol/QEnd-Eagle Escapades
130004	Schol/QEnd-Boeing Elec Tech
130005	Schol/QEnd-H. W. Wilson
130006	Schol/QEnd-Dr James Tad Lott
130007	Schol/QEnd-Pres Council
130008	Schol/QEnd-L Murchison Ugrad
130009	Schol/QEnd-L Murchison Cmht
130010	Schol/QEnd-L Murchison Dance
130011	Schol/QEnd-L Murchison Costum
130012	Schol/QEnd-L Murchison Dramate
130013	Schol/QEnd-Paramount Pictures
130014	Schol/QEnd-Paramount Pic/D&D
130015	Schol/QEnd-Paramount Bio Sci
130016	Schol/QEnd-Paramount Pic/CVAD
130017	Schol/QEnd-Men's Golf
130018	Schol/QEnd-Chancellor Hotel
130019	Schol/QEnd-CMHT--Banff Vintner
130020	Schol/QEnd-Auxiliary Services
130021	Schol/QEnd-L Murchison Grad
130022	Schol/QEnd-TCOM Minority
130023	Schol/OFnd-Grainner

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

The screenshot shows the 'Accounting Defaults' table in the EIK system. The table has columns for Dist, Percent, Location, GL Unit, Account, Alt Acct, Dept, Fund Cat, Fund, Function, PC Bus Unit, and Proj. The 'Function' column is highlighted with a magnifying glass icon.

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

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

The screenshot shows the 'Look Up Function' dialog box. The 'Function' dropdown is set to 'begins with' and the 'Description' dropdown is also set to 'begins with'. The 'Search Results' table is visible, listing various functions and their descriptions.

Function	Description
100	Instruction-General
110	Instruction-Sponsored
120	Instruction-Sponsored C/S
130	Practice Direct
132	Practice Indirect
200	Research-Sponsored
210	Research-Sponsored C/S
215	Research-Univ Sponsored
220	Research-Departmental
300	Public Service
310	Public Service-Sponsored
320	Public Service-Sponsored C/S
400	Academic Support
410	Libraries
420	Departmental Administration
500	Student Services
550	General Administration
560	Sponsored Projects Admin
570	Development & Fundraising
600	Operations and Maintenance
630	Scholarships and Fellowships
650	Depreciation & Amortization
700	Auxiliary Enterprise
750	Teaching Hospitals & Med Ctrs
800	Independent Operations
850	Capital Projects
899	SUSPENSE [CONV ONLY]
U99	UNMAPPED
Z99	INACTIVE

14. Click **OK**.

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

The screenshot shows the 'Requisition Settings' screen with the 'Look Up Function' dropdown closed. The 'Function' field in the Accounting Defaults table is now populated with '550'.

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000	200	830001	550		

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:

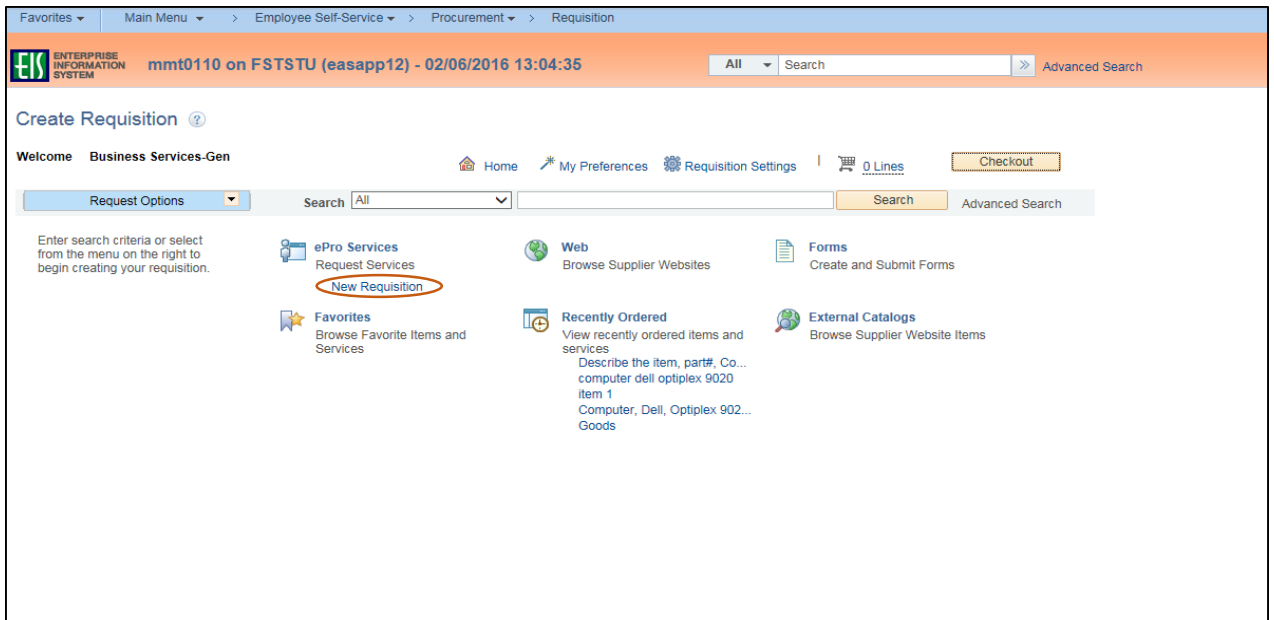
- ✓ Department contact full name, full phone number & email.
- ✓ Any special requirements or handling requests (ex. Where to email order).
- ✓ Service dates and/or date needed.
- ✓ Reference full name and contract number of any Co-operative contracts, if applicable.
- ✓ Note if sole source, proprietary 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 next phase of reviewing requisition details.

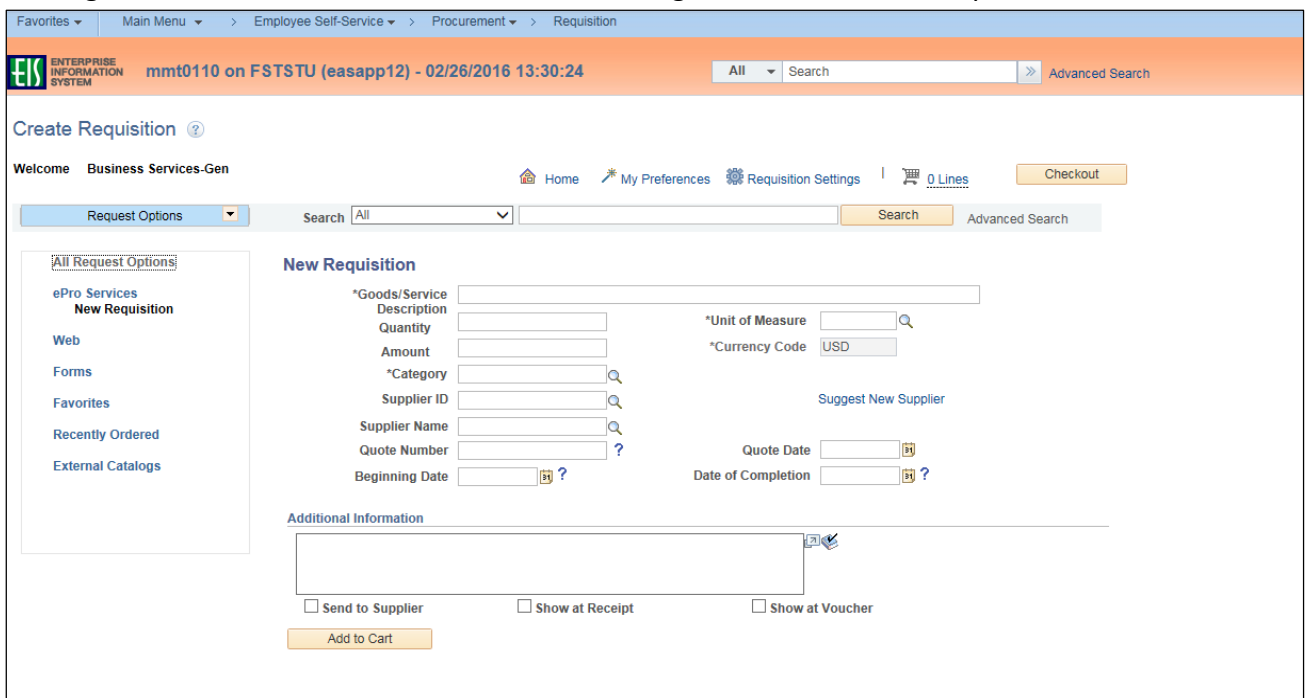
1. Click **New Requisition** under the **ePro Services** section.



The screenshot shows the 'Create Requisition' page in the Enterprise Information System. The page header includes the system name 'ENTERPRISE INFORMATION SYSTEM', user 'mmt0110 on FSTSTU (easapp12)', and date '02/06/2016 13:04:35'. The main content area is titled 'Create Requisition' and features a 'Request Options' dropdown menu. Under the 'ePro Services' section, the 'New Requisition' option is circled in red. Other options include 'Request Services', 'Web', 'Forms', 'Favorites', 'Recently Ordered', and 'External Catalogs'. The 'Recently Ordered' section displays a list of items: 'computer dell optiplex 9020 item 1' and 'Computer, Dell, Optiplex 902... Goods'.

2. Enter the description of the good or service in the **Goods/Service Description** field.

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



The screenshot shows the 'New Requisition' form in the Enterprise Information System. The page header includes the system name 'ENTERPRISE INFORMATION SYSTEM', user 'mmt0110 on FSTSTU (easapp12)', and date '02/26/2016 13:30:24'. The main content area is titled 'New Requisition' and features a form with the following fields: '*Goods/Service Description', 'Quantity', 'Amount', '*Category', 'Supplier ID', 'Supplier Name', 'Quote Number', 'Beginning Date', '*Unit of Measure', '*Currency Code' (set to 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. The 'Additional Information' section is currently empty.

3. Type the 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) - 02/26/2016 13:30:24'. The page is divided into a left sidebar with navigation options like 'All Request Options', 'ePro Services', 'Web', 'Forms', 'Favorites', 'Recently Ordered', and 'External Catalogs'. The main content area is titled 'New Requisition' and contains several input fields: '*Goods/Service Description' (Wicks Opus 5268), 'Quantity' (highlighted with a red circle), 'Amount', '*Category', 'Supplier ID', 'Supplier Name', 'Quote Number', 'Beginning Date', '*Unit of Measure', '*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 'Quantity' field now contains the number '1'. The magnifying glass icon next to the '*Unit of Measure' field is highlighted with a red circle. The rest of the form and navigation elements are the same as in the previous screenshot.

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

The screenshot shows the 'Create Requisition' page in the EIS system. The 'Look Up Unit of Measure' dropdown is open, displaying a list of units. The 'Amount' field in the 'New Requisition' form is currently empty.

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
BBL	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 an estimated dollar amount for the good or service in the **Amount** field.

The screenshot shows the 'Create Requisition' page in the EIS system. The 'Amount' field in the 'New Requisition' form is highlighted with a red circle. The 'Unit of Measure' dropdown is set to 'EA' and the 'Currency Code' is 'USD'.

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

Enterprise Information System (EIK) interface for creating a requisition. The page title is "Create Requisition". The user is logged in as "mmt0110 on FSTSTU (easapp12) - 02/26/2016 13:30:24". The page shows a "New Requisition" form with the following fields:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- *Unit of Measure: EA
- Amount: 32,000.00
- *Currency Code: USD
- Category**: (Field circled in red, with a magnifying glass icon next to it)
- Supplier ID: (Field with a magnifying glass icon)
- Supplier Name: (Field with a magnifying glass icon)
- Quote Number: (Field with a question mark icon)
- Beginning Date: (Field with a calendar icon and a question mark icon)
- Quote Date: (Field with a calendar icon)
- Date of Completion: (Field with a calendar icon)

Additional Information section includes checkboxes for "Send to Supplier", "Show at Receipt", and "Show at Voucher". An "Add to Cart" button is located at the bottom.

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

Enterprise Information System (EIK) interface for looking up a category. The page title is "Look Up Category". The user is logged in as "mmt0110 on FSTSTU (easapp12) - 02/06/2016 15:27:16". The page shows a search form with the following fields:

- Search Categories: (Dropdown menu)
- Search By: Category (Field with a dropdown arrow circled in red)
- Find: (Button)
- Browse Category Tree: (Section header)
- Return: (Button)

9. Select **Description** from the **Search By** dropdown menu.
10. Type a word to search in the empty field next to **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.

Enterprise Information System (EIS) interface showing the 'Look Up Category' page. The breadcrumb trail is: Favorites > Main Menu > Employee Self-Service > Procurement > Requisition. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/06/2016 15:27:16'. The page title is 'Look Up Category'. A note states: 'You may either Search or Browse to look up the appropriate category for your special request.' The 'Search Categories' section has a 'Search By' dropdown menu with 'Description' selected. There is an empty text input field next to it and a 'Find' button. Below this is a 'Browse Category Tree' section with a 'Return' button.

11. Click **Find**.

The same 'Look Up Category' page as above, but now the 'Find' button has been clicked. The 'Search By' dropdown remains 'Description', and the text input field now contains the word 'Furniture'. The 'Find' button is highlighted. Below the search section, the 'Browse Category Tree' section is expanded to show search results.

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.

The 'Look Up Category' page showing search results. The 'Search By' dropdown is 'Description' and the text input field contains 'Furniture'. The 'Find' button is highlighted. Below the search section, the 'Browse Category Tree' section is expanded to show search results. The results are displayed in a table with columns: Catalog, Category, Description, and Find in Tree. The table shows one result: '1 PROCUREMENT' with category code '931-46' and description 'Maintenance - Furniture'. There are navigation controls above the table: 'Personalize | Find | View All | First | 1 of 1 | Last'. Below the table is a 'Browse Category Tree' section with a 'Return' button.

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

13. Enter "RFQ" in the **Quote Number** field.

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) - 02/26/2016 13:30:24". The page shows a navigation menu with "Request Options" selected. The main form is titled "New Requisition" and contains the following fields:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- *Unit of Measure: EA
- Amount: 32,000.00
- *Currency Code: USD
- *Category: 931-46
- Supplier ID: [Empty]
- Supplier Name: [Empty]
- 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.

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

The same "Create Requisition" form as in the previous screenshot, but with the following changes:

- Quote Number: RFQ
- Beginning Date: [Empty]

The calendar icon for the Beginning Date field is circled in red.

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

The screenshot shows the 'Create Requisition' page in the EIS system. The 'New Requisition' form is partially filled with the following details:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- Amount: 32,000.00
- *Unit of Measure: EA
- *Currency Code: USD
- *Category: 931-46
- Quote Number: RFQ
- Beginning Date: [calendar icon]
- Date of Completion: [calendar icon]

A calendar pop-up is displayed over the 'Date of Completion' field, showing the month of February 2016. The date 26 is highlighted in blue. The calendar includes a header with days of the week (S, M, T, W, T, F, S) and a grid of dates from 1 to 29.

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

The screenshot shows the 'Create Requisition' page with the 'Date of Completion' field highlighted by a red circle. The form details are the same as in the previous screenshot, but the 'Date of Completion' field now contains the date 02/01/2016. The 'Date of Completion' field has a calendar icon next to it, which is circled in red.

17. 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. Formal bids can take from 15 to 90 days depending on dollar amount.

The screenshot shows the 'Create Requisition' page. The 'New Requisition' section is populated with the following data:

- *Goods/Service: Wicks Opus 5268
- Description: [Empty]
- Quantity: 1
- Amount: 32,000.00
- *Category: 931-46
- Supplier ID: [Empty]
- Supplier Name: [Empty]
- Quote Number: RFQ
- Beginning Date: 02/01/2016
- *Unit of Measure: EA
- *Currency Code: USD
- Quote Date: [Empty]
- Date of Completion: [Empty]

The 'Additional Information' field is empty. There are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Add to Cart' button is highlighted with a red circle.

18. Type any necessary information in the **Additional Information** field.
 19. Click **Add to Cart**.
 20. Repeat steps 2-19 for each item to be purchased.

The screenshot shows the 'Create Requisition' page with the following data:

- *Goods/Service: Wicks Opus 5268
- Description: [Empty]
- Quantity: 1
- Amount: 32,000.00
- *Category: 931-46
- Supplier ID: [Empty]
- Supplier Name: [Empty]
- Quote Number: RFQ
- Beginning Date: 02/01/2016
- *Unit of Measure: EA
- *Currency Code: USD
- Quote Date: [Empty]
- Date of Completion: 02/29/2016

The 'Additional Information' field is empty. There are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Add to Cart' button is highlighted with a red circle.

Note: Number of lines in the order will be visible beside the **Shopping Cart** icon located next to **Checkout**.

21. Click **Checkout** when order is complete.


The screenshot displays the 'Create Requisition' interface. At the top, there is a navigation bar with 'Checkout' highlighted in a red circle. Below the navigation bar, the page title is 'Create Requisition'. The main content area is titled 'New Requisition' and contains the following fields:

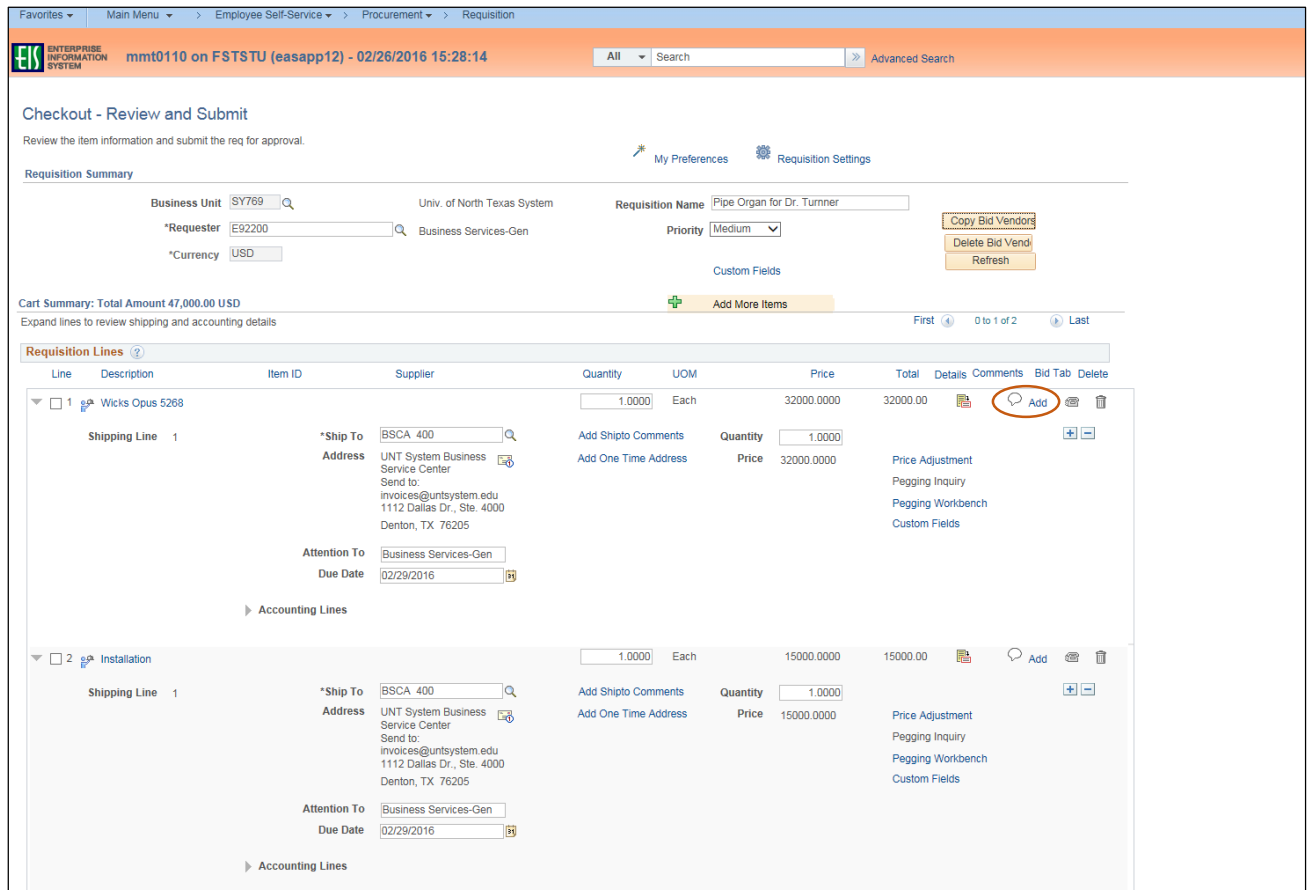
- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- *Unit of Measure: EA
- Amount: 32,000.00
- *Currency Code: USD
- *Category: 931-46
- Supplier ID: [Empty]
- Supplier Name: [Empty]
- Quote Number: RFQ
- Beginning Date: 02/01/2016
- Quote Date: [Empty]
- Date of Completion: 02/29/2016

Below the main form, there 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.

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 to ensure the information is correct and complete.
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.



Enterprise Information System
mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14



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: Pipe Organ for Dr. Turnner
Priority: Medium
Buttons: Copy Bid Vendors, Delete Bid Vend, Refresh

Cart Summary: Total Amount 47,000.00 USD
Expand lines to review shipping and accounting details
Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5268			1.0000	Each	32000.0000	32000.00		 Add		
Shipping Line 1											
			*Ship To: BSCA 400	Add Shipto Comments	Quantity: 1.0000						
			Address: UNT System Business Service Center	Add One Time Address	Price: 32000.0000						
			Send to: invoices@untssystem.edu								
			1112 Dallas Dr., Ste. 4000								
			Denton, TX 76205								
			Attention To: Business Services-Gen								
			Due Date: 02/29/2016								
Accounting Lines											
2	Installation			1.0000	Each	15000.0000	15000.00		 Add		
Shipping Line 1											
			*Ship To: BSCA 400	Add Shipto Comments	Quantity: 1.0000						
			Address: UNT System Business Service Center	Add One Time Address	Price: 15000.0000						
			Send to: invoices@untssystem.edu								
			1112 Dallas Dr., Ste. 4000								
			Denton, TX 76205								
			Attention To: Business Services-Gen								
			Due Date: 02/29/2016								
Accounting Lines											

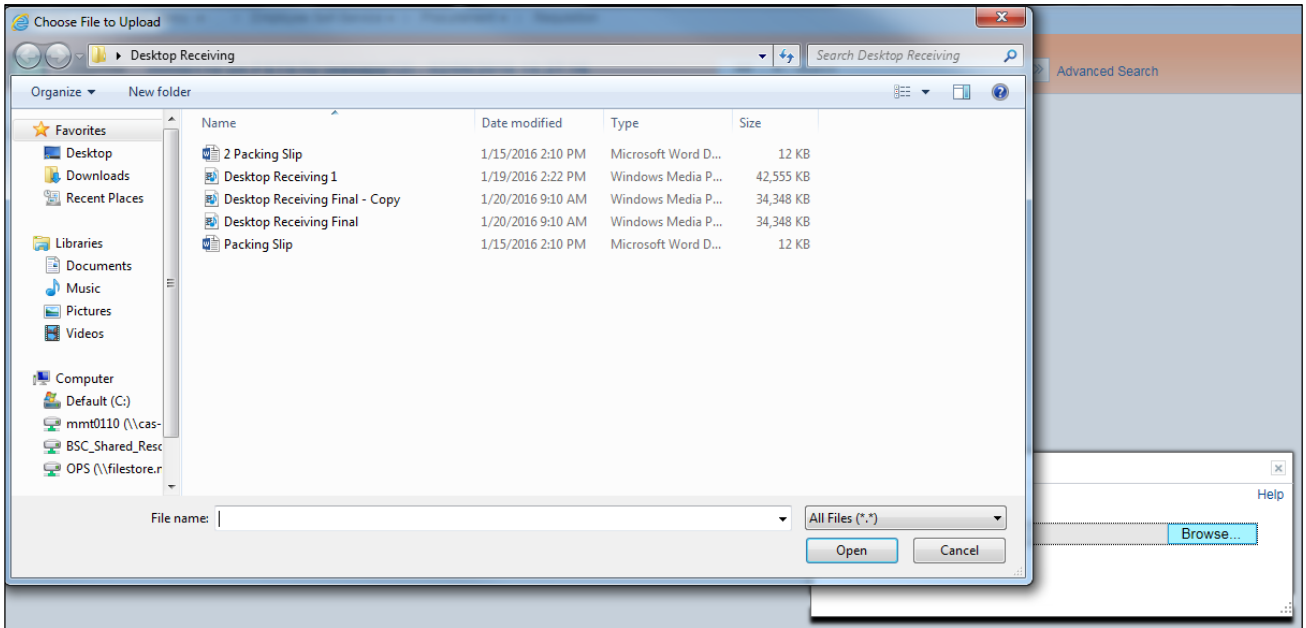
- Enter comment in the **Comments** field within the **Line Comment** section.
Note: Line comment is specific to the line item and is different from the **Requisition Comment** on the **Checkout – Review and Submit** screen.
- Click **Add Attachments** to attach the required [Request for Formal Solicitation](#) form.
Note: Ensure all applicable documents are attached.

The screenshot shows the 'Line Comment' form in the EIS system. The breadcrumb trail at the top reads: Favorites > Main Menu > Employee Self-Service > Procurement > Requisition. The header includes the EIS logo, the text 'mmt0110 on FSTSTU (easapp12) - 02/06/2016 15:27:16', and a search bar with 'All' and 'Search' options. The form displays 'Business Unit SY769', 'Requisition Date 02/06/2016', and 'Status Open'. Under 'Line 1', there is a 'Comments' section with a 'Find' button and navigation arrows. A text area contains the text 'Use Standard Comments' and 'Entered On:'. Below the text area are three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Add Attachments' button is visible, along with an 'Attachments' section that is currently collapsed. At the bottom of the form are 'OK' and 'Cancel' buttons.

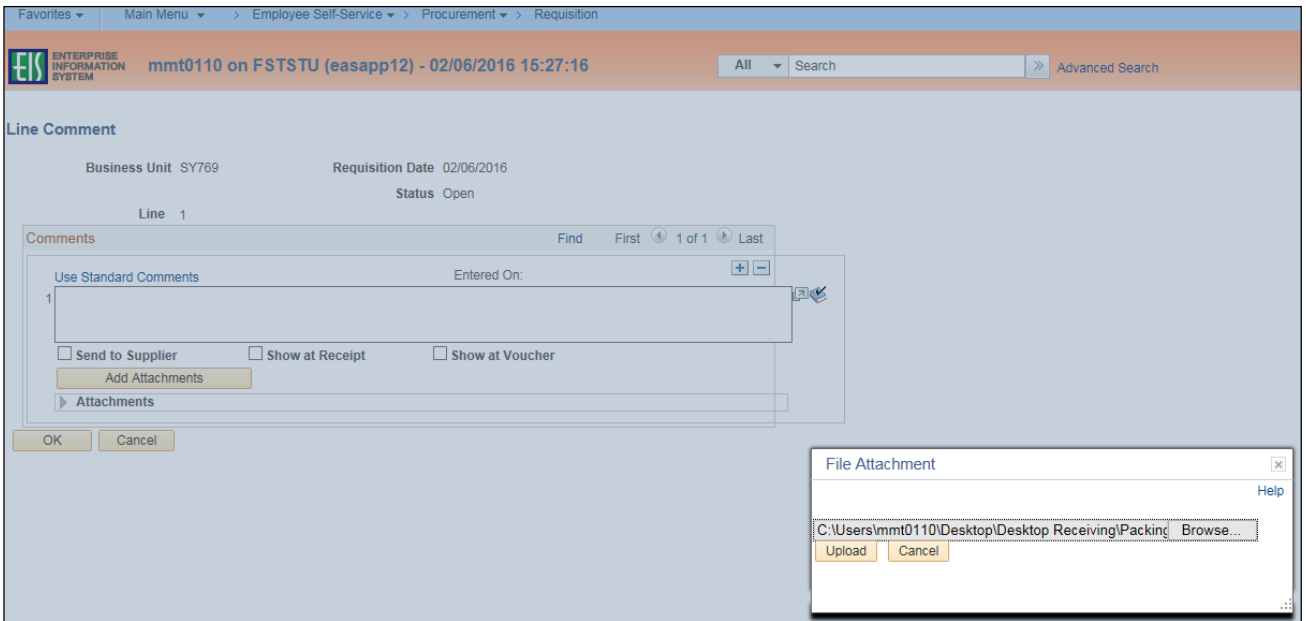
- Click **Browse** in the **File Attachment** box.

This screenshot shows the same 'Line Comment' form as above, but with a 'File Attachment' dialog box open in the foreground. The dialog box has a title bar with 'File Attachment' and a close button. It contains a 'Browse...' button, an 'Upload' button, and a 'Cancel' button. The background form is dimmed, showing the 'Add Attachments' button and the 'Attachments' section.

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




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



9. Confirm the file was uploaded by verifying the 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**.

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

 ENTERPRISE INFORMATION SYSTEM

test_POeProEntry on FSTSTU (easapp12) - 11/23/2015 15:01:08

Line Comment

Business Unit NT752 Requisition Date 11/23/2015
 Status Open


Line 1

Comments Find First 1 of 1 Last
 Entered On: 11/23/2015 3:01:09PM


1

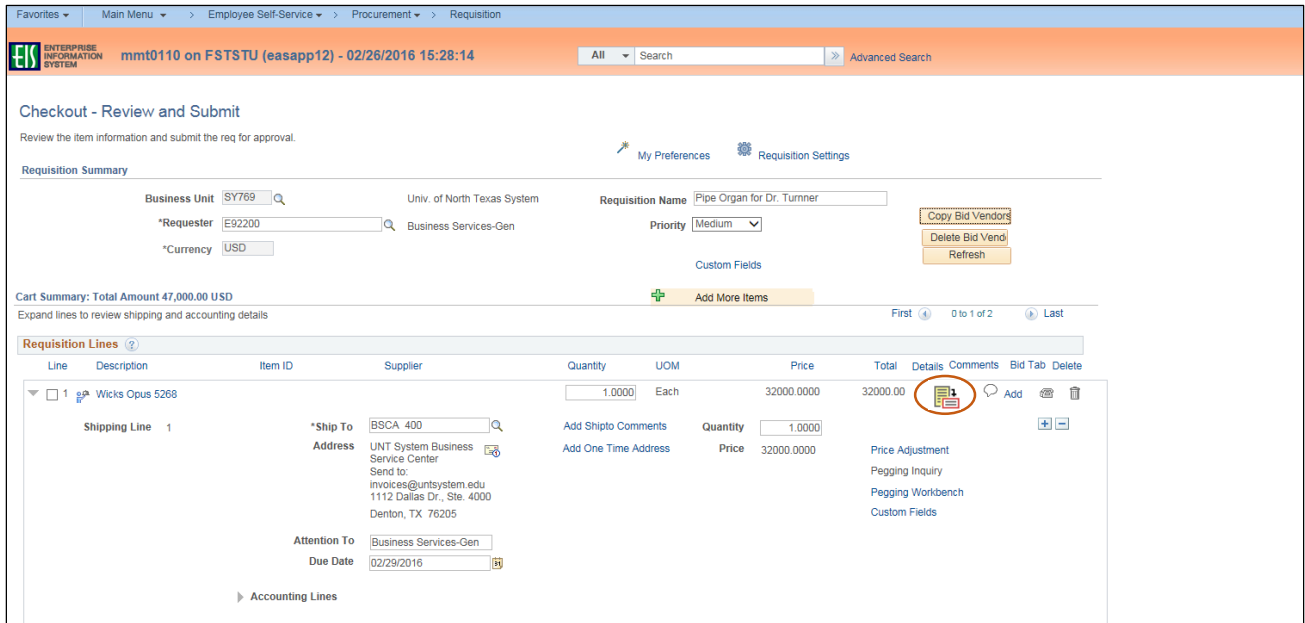
Send to Supplier Show at Receipt Show at Voucher

Add Attachments

Attachments		View	Send to Supplier	
Attached File	User/Date Time			
1 Process_4.2.4.1__Vendor_Record_Inactivation.pdf	test_POeProEntry201 5-11-23-15.14.10.822	View	<input type="checkbox"/>	

OK Cancel

12. Click the line details icon  when creating a requisition for a formal bid.




Enterprise Information System
mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14

Checkout - Review and Submit

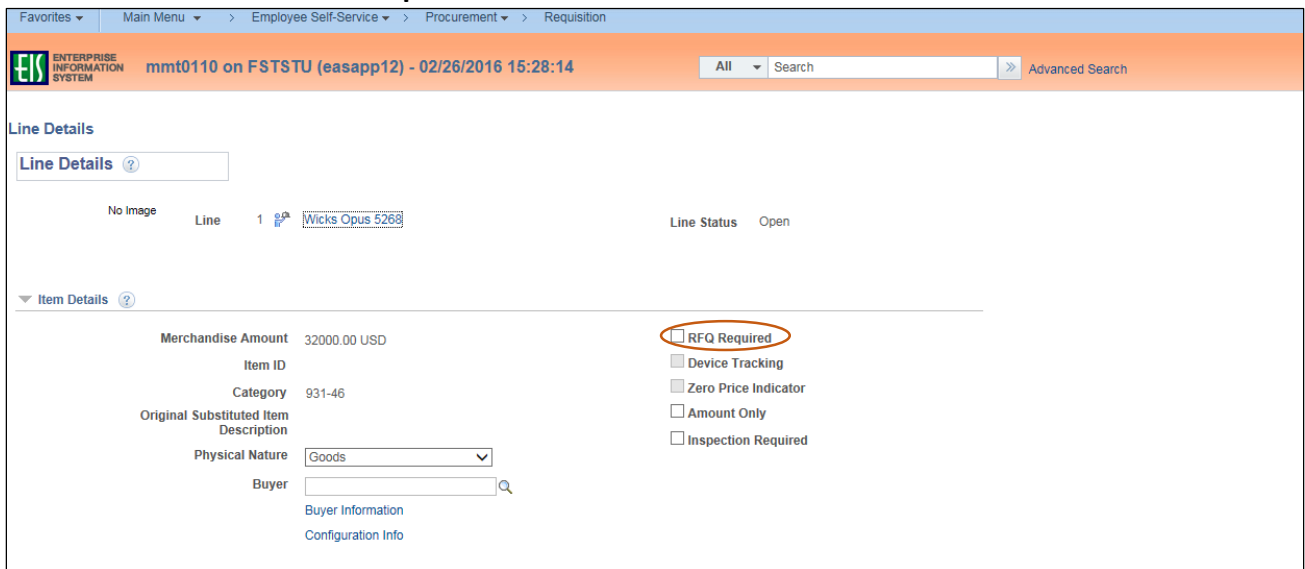
Requisition Summary

Business Unit: SY769, Univ. of North Texas System
 *Requester: E92200, Business Services-Gen
 *Currency: USD
 Requisition Name: Pipe Organ for Dr. Turner
 Priority: Medium

Cart Summary: Total Amount 47,000.00 USD

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Shipping Line	Wicks Opus 5268	BSCA 400	1.0000	Each	32000.0000	32000.00				

13. Select the box next to **RFQ Required** on the **Line Details** screen.



Enterprise Information System
mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14

Line Details

Line 1: Wicks Opus 5268, Line Status: Open


Item Details

Merchandise Amount: 32000.00 USD
 Item ID: Wicks Opus 5268
 Category: 931-46
 Physical Nature: Goods
 Buyer: [Search]

RFQ Required
 Device Tracking
 Zero Price Indicator
 Amount Only
 Inspection Required


14. Click **OK** at the bottom of the screen.
15. Repeat steps 12-14 for each line item.

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


mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14

[All](#) Search [Advanced Search](#)

Line Details



No Image Line 1  Wicks Opus 5268 Line Status Open

Item Details

Merchandise Amount	32000.00 USD	<input checked="" type="checkbox"/> RFQ Required
Item ID		<input type="checkbox"/> Device Tracking
Category	931-46	<input type="checkbox"/> Zero Price Indicator
Original Substituted Item Description		<input type="checkbox"/> Amount Only
Physical Nature	<input type="text" value="Goods"/>	<input type="checkbox"/> Inspection Required
Buyer	<input type="text"/>	
	Buyer Information	
	Configuration Info	


Contract Information


Use Contract if Available

Contract ID  


[Contract Details](#)


Version

Contract Line 

Category Line 

Supplier Information

Supplier ID 


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

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

Enterprise Information System | mmt0110 on F8TSTU (easapp12) - 02/26/2016 15:28:14 | 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: Pipe Organ for Dr. Turner
 *Requester: E92200 | Business Services-Gen | Priority: Medium
 *Currency: USD

Cart Summary: Total Amount 47,000.00 USD | Add More Items

Expand lines to review shipping and accounting details

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5260			1.0000	Each	32000.0000	32000.00				
<p>Shipping Line 1</p> <p>*Ship To Address: BSCA 400, UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205</p> <p>Attention To: Business Services-Gen, Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
2	Installation			1.0000	Each	15000.0000	15000.00				
<p>Shipping Line 1</p> <p>*Ship To Address: BSCA 400, UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205</p> <p>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 47,000.00 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

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier | Show at Receipt | Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Check Budget | Pre-Check Budget

Save & submit | Save for Later | Add More Items | Preview Approvals

Add more Comments and Attachments

18. Click **Use Standard Comments**.

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

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

Standard Comment Type	Description
AM	Asset Management
AP	Accounts Payables
CO	Change Order
CR	Central Receiving
PO	Purchase Order/Req Comments
REQ	Template Justification
SUP	Supplier Instructions
T&C	Terms & Conditions

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

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: [magnifying glass icon]

Description: [text box]

Buttons: Search, Reset, OK, Cancel

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

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: [magnifying glass icon]

Description: [text box]

Buttons: Search, Reset, OK, Cancel

Look Up Comment ID

SetID: SHARE

Standard Comment Type: REQ

Standard Comment ID: begins with [dropdown]

Description: begins with [dropdown]

Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results

Standard Comment ID	Description
JUST	Req Comments Justification

23. Click **OK**.

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: JUST

Description: [text box]

Buttons: 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 '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 fields for 'Comment Type' (REQ), 'Comment ID' (JUST), and 'Description'. Below this is a table of 'Standard Comments' with columns for 'Select', 'Comment Type', 'REQ', and 'Comment ID', 'JUST'. The first row has a checkbox, 'REQ', and 'JUST'. The 'Description' column contains the text: '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', and '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.

24. Click the box next to the appropriate standard comment option to make your selection.
25. Click **OK**.

This screenshot is identical to the one above, but the checkbox in the 'Select' column of the 'Standard Comments' table is now checked, indicating that the first comment option has been selected.

26. 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 be provided in the **Requisition Comments and Attachments** section of the requisition. See [Procurement Guide](#) for additional instructions.

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

27. Click **OK**.

Enterprise Information System (EIS) interface showing the 'Header Comments' section for a requisition. The requisition details are: Business Unit SY769, Requisition Date 02/26/2016, and Status Open. The 'Comments' section is active, displaying a comment entered by Karen James (karenjames@unt.edu) with special instructions and attachments. The 'Attachments' table below the comment shows one attached file. The 'OK' button is highlighted at the bottom of the comment entry area.

28. 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?

29. 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

Special Instructions: Please email the address above when the order ships
Attachments: Refer to any attachments such as contracts or quotes
Purpose: This purchase will allow Professor Turnner to complete the composition of a concert which could result in grants and national recognition for the UNT System.

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](#)

[Save & submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#)

30. Click **Save for Later** at the bottom of the screen.

Enterprise Information System | mmt0110 on FSTSTU (easapp12) - 02/26/2016 16:28:14 | 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: Pipe Organ for Dr. Turner
 *Requester: E92200 | Business Services-Gen | Priority: Medium
 *Currency: USD

Buttons: Copy Bid Vendor, Delete Bid Vendor, Refresh

Cart Summary: Total Amount 47,000.00 USD | Add More Items

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

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5266			1.0000	Each	32000.0000	32000.00				
<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: 32000.0000</p> <p>Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205</p> <p>Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
2	Installation			1.0000	Each	15000.0000	15000.00				
<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: 15000.0000</p> <p>Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205</p> <p>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 47,000.00 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

Special Instructions: Please email the address above when the order ships
 Attachments: Refer to any attachments such as contracts or quotes
 Purpose: This purchase will allow Professor Turner to complete the composition of a concert which could result in grants and national recognition for the UNT System.

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

Approval Justification

Enter approval justification for this requisition

This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.

Check Budget | Pre-Check Budget

Save & submit | Save for Later | Add More Items | 63 Preview Approvals

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

Enterprise Information System
 mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14

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: Pipe Organ for Dr. Turner
 Priority: Medium

Buttons: Copy Bid Vendors, Delete Bid Vendl, Refresh

Cart Summary: Total Amount 47,000.00 USD
 Add More Items

Expand lines to review shipping and accounting details

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5268			1.0000	Each	32000.0000	32000.00				
<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</p> <p>Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p> Accounting Lines</p>											
2	Installation			1.0000	Each	15000.0000	15000.00				
<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</p> <p>Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p> Accounting Lines</p>											

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

33. 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. It includes a 'Requisition Summary' section with fields for Business Unit (SY769), Requester (ER2200), and Requisition Name (Pipe Organ for Dr. Turner). Below this is a 'Cart Summary' showing a total amount of 47,000.00 USD. The main section is 'Requisition Lines', which lists two items: 'Wicks Opus 5268' and 'Installation'. The 'Wicks Opus 5268' line is expanded to show 'Shipping Line 1' and 'Accounting Lines'. The 'Accounting Lines' table is highlighted with a red circle and contains the following data:

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		BSCP 400	1.0000	100.0000	32,000.00	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	32,000.00	SY769							

Chartfields 2

Accounting Lines														Personalize Find View All First 1 of 1 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					
53505	7367	922000	200	830001	550													

34. Follow steps 35-37 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**.

35. 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	32,000.00	SY769				+	-				

36. 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	32,000.00	SY769				+	-				
2	Open		BSCP 400	0.0000		0.00	SY769				+	-				

37. Click on the **Chartfields 2** tab.

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	16,000.00	SY769				+	-				
2	Open		BSCP 400	0.5000	50.0000	16,000.00	SY769				+	-				

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

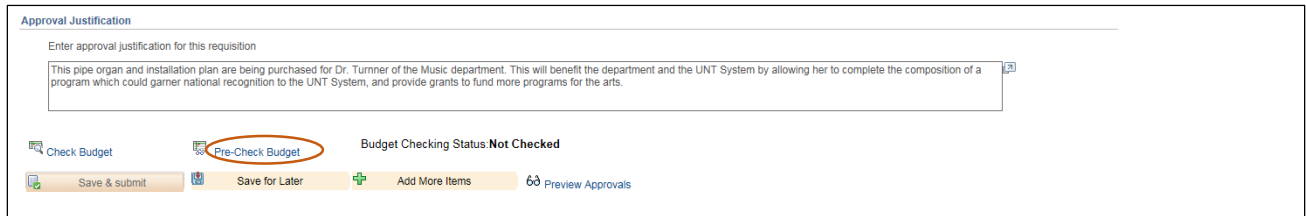
Accounting Lines														Personalize	Find	View All	First	1-2 of 2	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information													
Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate						
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** at the bottom of the screen 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.



Approval Justification

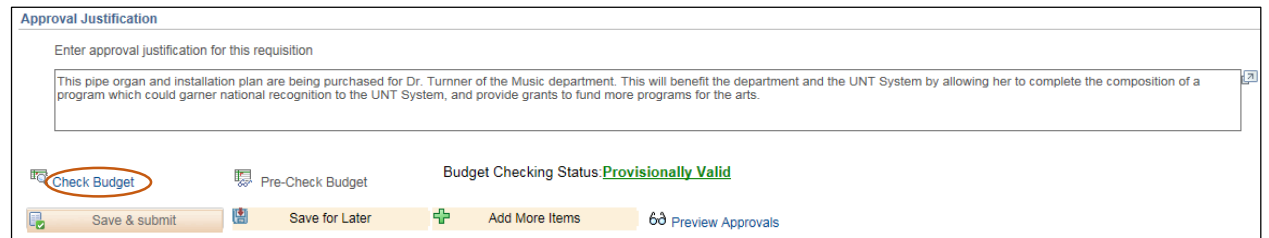
Enter approval justification for this requisition

This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.

Check Budget Pre-Check Budget Budget Checking Status: **Not Checked**

Save & submit Save for Later Add More Items Preview Approvals

2. Click **Check Budget** to conduct an official budget check, and encumber the necessary funds.



Approval Justification

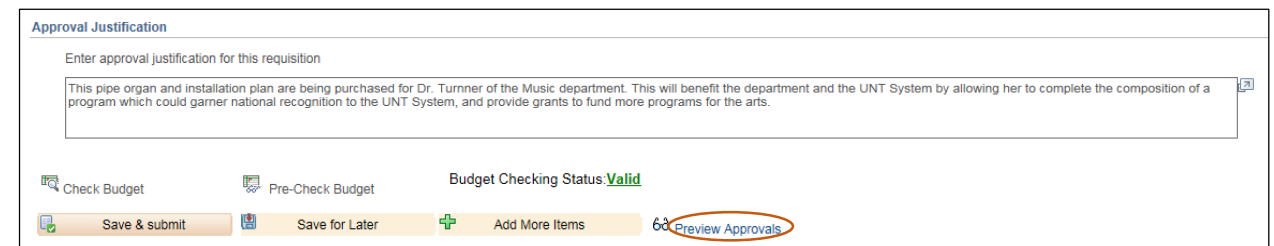
Enter approval justification for this requisition

This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.

Check Budget Pre-Check Budget Budget Checking Status: **Provisionally Valid**

Save & submit Save for Later Add More Items Preview Approvals

3. Click **Preview Approvals**.



Approval Justification

Enter approval justification for this requisition


This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.


Check Budget Pre-Check Budget Budget Checking Status: **Valid**

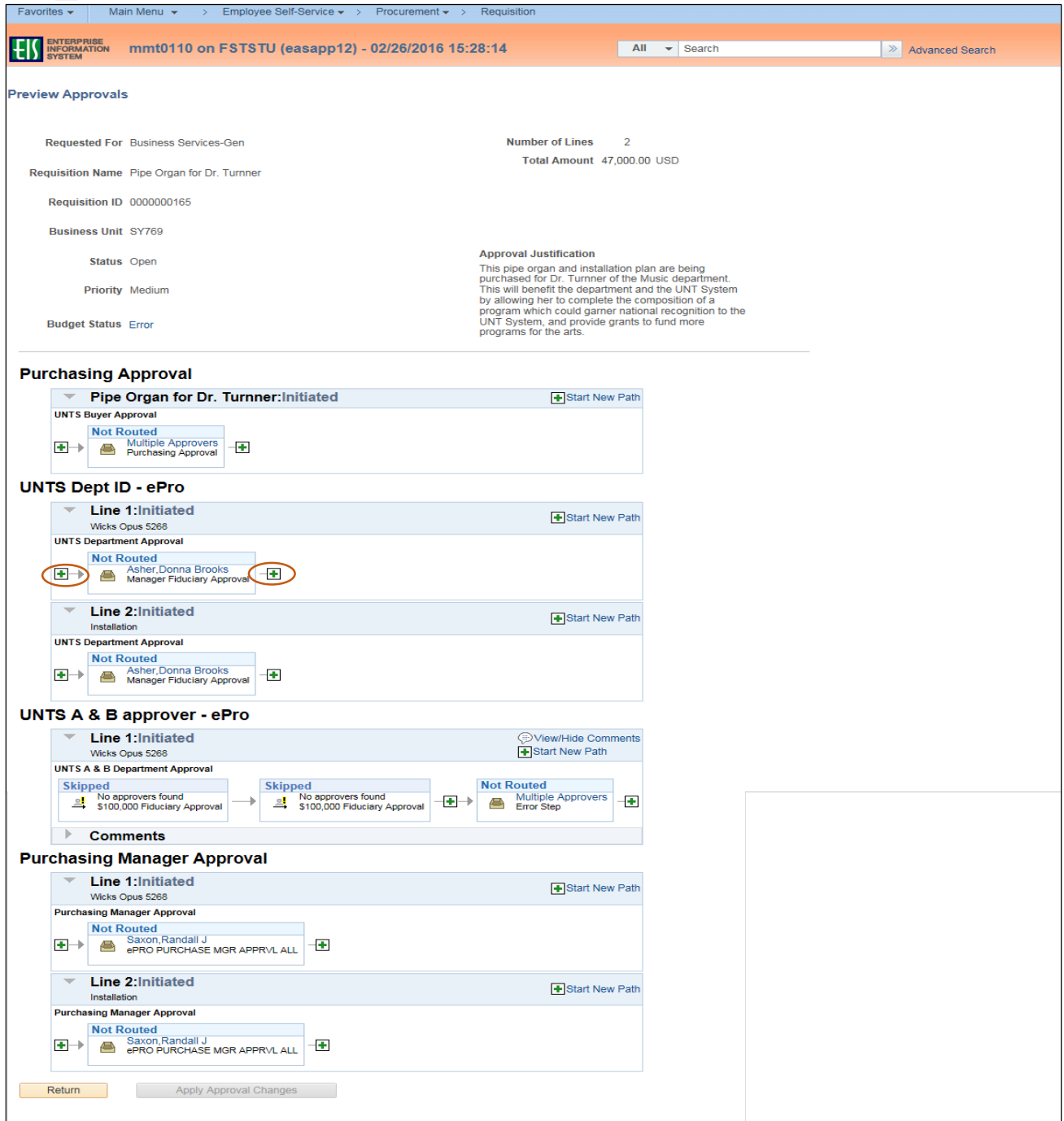
Save & submit Save for Later Add More Items Preview Approvals

- 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, move to step 5 to ad hoc to the appropriate Approver/Reviewer.

- Click the green plus symbol  to add an Approver.



Note: You may add an Approver/Reviewer 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: Pipe Organ for Dr. Turner Total Amount: 47,000.00 USD
 Requisition ID: 0000000165
 Business Unit: SY769
 Status: Open Approval Justification: This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.
 Priority: Medium
 Budget Status: Error

Purchasing Approval





▼ **Pipe Organ for Dr. Turner: Initiated**  Start New Path
 UNTS Buyer Approval
 Not Routed
 Multiple Approvers
 Purchasing Approval 

UNTS Dept ID - ePro



▼ **Line 1: Initiated**  Start New Path
 Wicks Opus 5268
 UNTS Department Approval
 Not Routed
 Asher, Donna Brooks
 Manager Fiduciary Approval  



▼ **Line 2: Initiated**  Start New Path
 Installation
 UNTS Department Approval
 Not Routed
 Asher, Donna Brooks
 Manager Fiduciary Approval 

UNTS A & B approver - ePro

▼ **Line 1: Initiated**  View/Hide Comments  Start New Path
 Wicks Opus 5268
 UNTS A & B Department Approval
 Skipped No approvers found \$100,000 Fiduciary Approval → Skipped No approvers found \$100,000 Fiduciary Approval  → Not Routed Multiple Approvers Error Step 

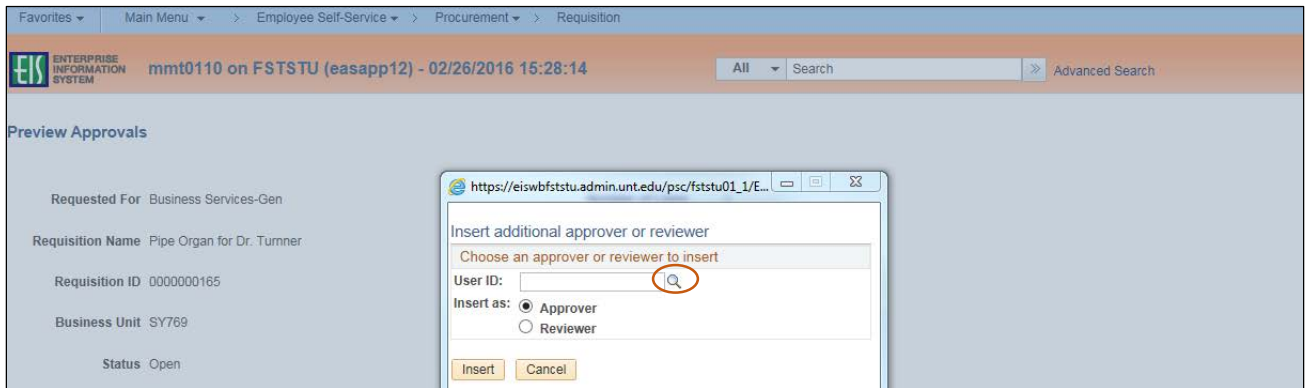
Purchasing Manager Approval

▼ **Line 1: Initiated**  Start New Path
 Wicks Opus 5268
 Purchasing Manager Approval
 Not Routed
 Saxon, Randall J
 ePRO PURCHASE MGR APPRVL ALL 

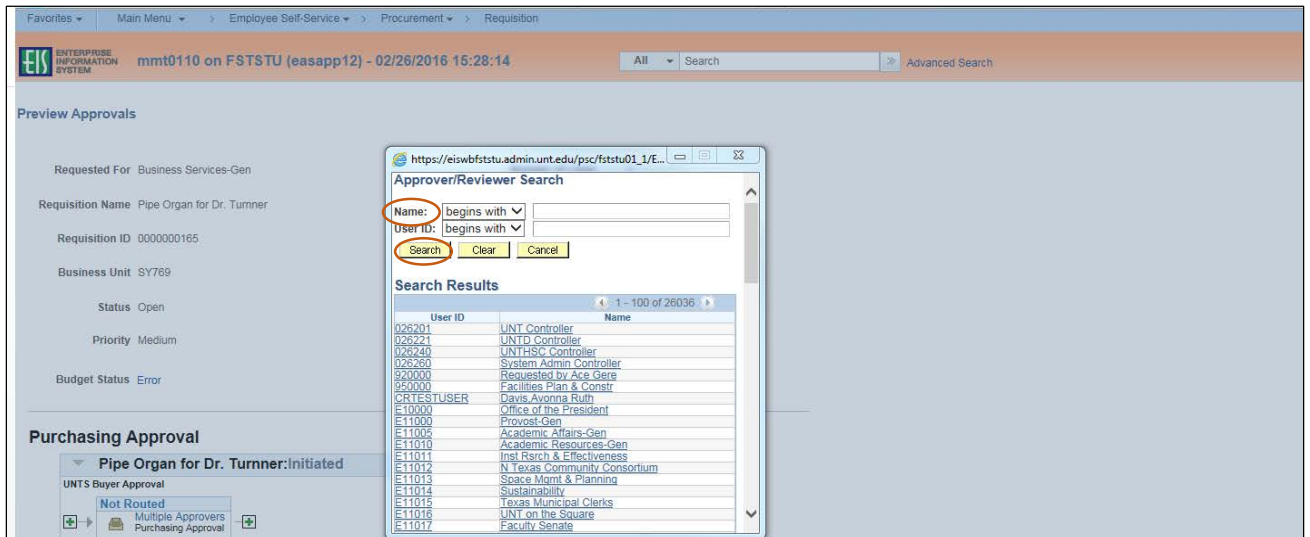
▼ **Line 2: Initiated**  Start New Path
 Installation
 Purchasing Manager Approval
 Not Routed
 Saxon, Randall J
 ePRO PURCHASE MGR APPRVL ALL 

Return Apply Approval Changes

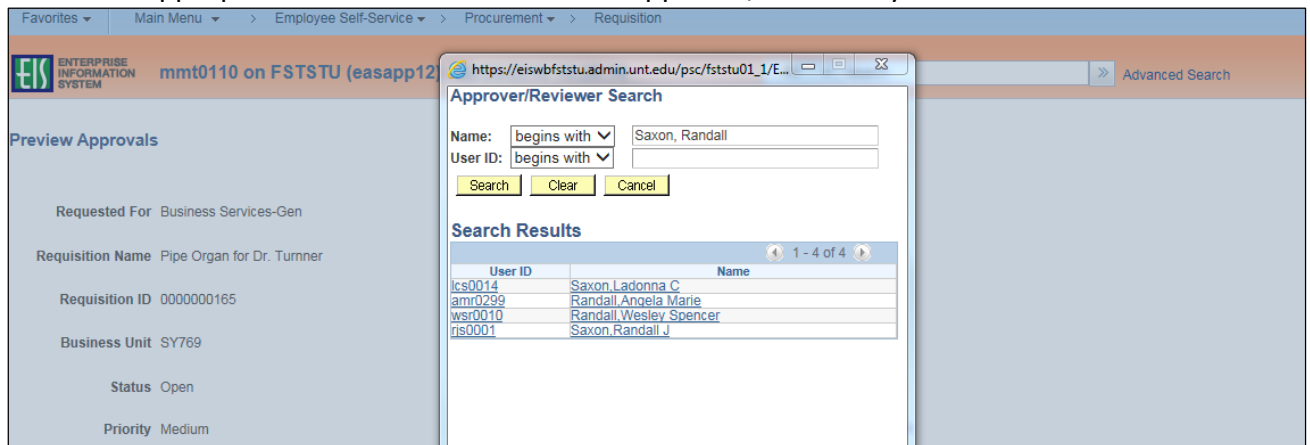
- Click on the magnifying glass beside the blank **User ID** field.



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

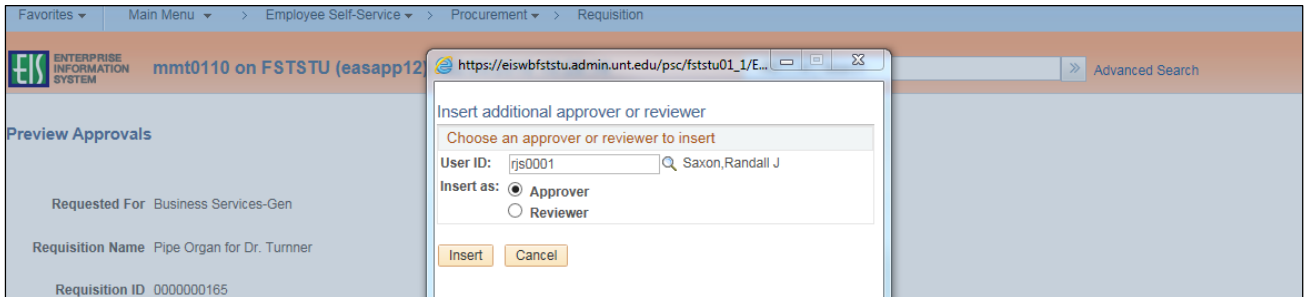


- Select the appropriate **Name** or **User ID** for the Approver/Reviewer you want to insert.



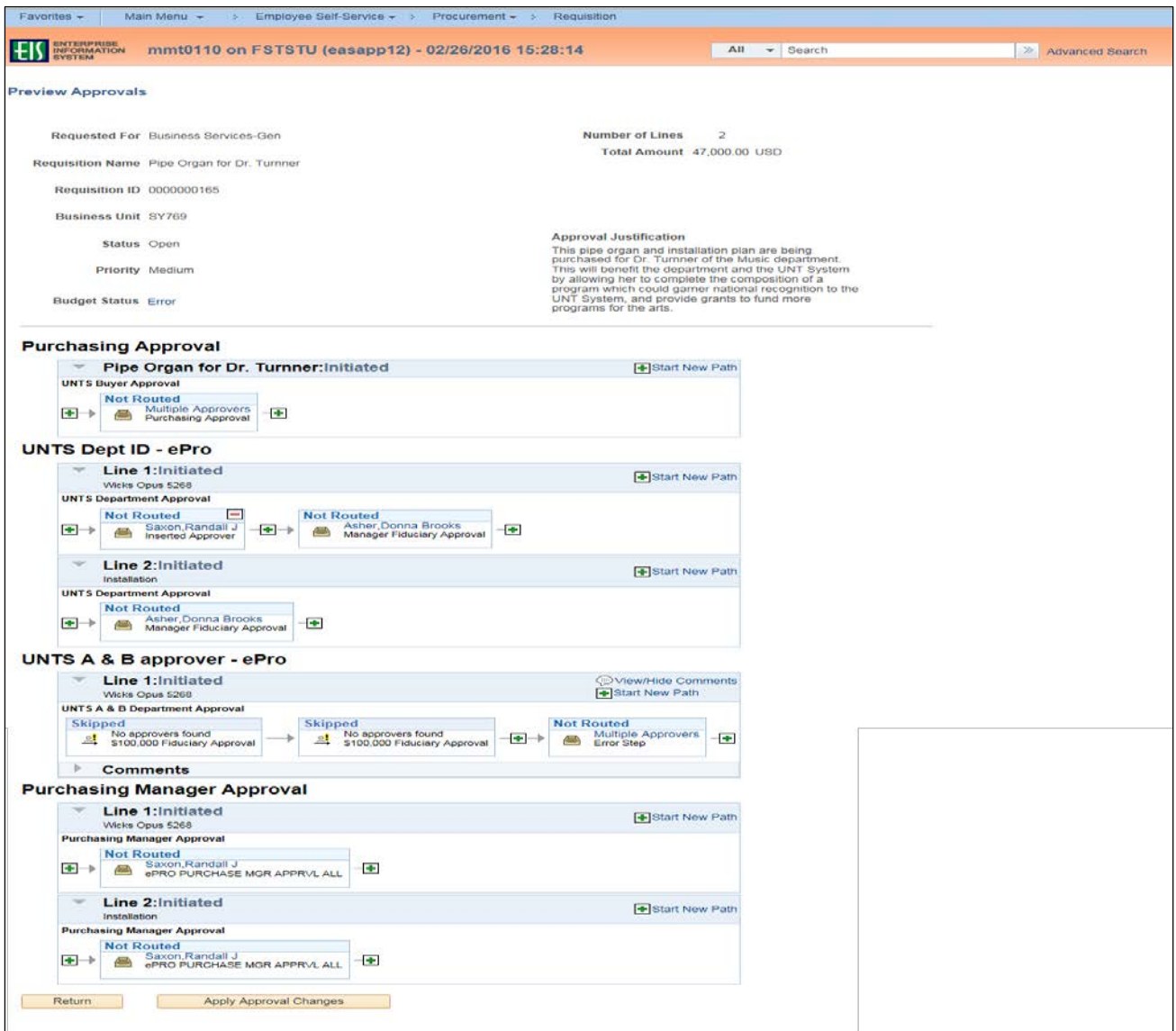
10. Click **Insert**.

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



11. Click **Apply Approval Changes**.

12. Repeat steps 4-11 for each additional Approver or Reviewer you need to add.



13. Click **Return**.

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

ENTERPRISE INFORMATION SYSTEM **mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14**
All Search [Advanced Search](#)

Preview Approvals

Requested For Business Services-Gen	Number of Lines 2
Requisition Name Pipe Organ for Dr. Turner	Total Amount 47,000.00 USD
Requisition ID 0000000165	
Business Unit SY769	
Status Open	Approval Justification
Priority Medium	This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.
Budget Status Error	

Purchasing Approval

▼ Pipe Organ for Dr. Turner:Initiated + Start New Path

UNTS Buyer Approval

Not Routed
+ -

Multiple Approvers Purchasing Approval

UNTS Dept ID - ePro

▼ Line 1:Initiated + Start New Path

Wicks Opus 5268

UNTS Department Approval

Not Routed -
+ →
Not Routed +

Saxon, Randall J Inserted Approver → Asher, Donna Brooks Manager Fiduciary Approval

▼ Line 2:Initiated + Start New Path

Installation

UNTS Department Approval

Not Routed +

Asher, Donna Brooks Manager Fiduciary Approval

UNTS A & B approver - ePro

▼ Line 1:Initiated View/Hide Comments + Start New Path

Wicks Opus 5268

UNTS A & B Department Approval

Skipped →
Skipped + →
Not Routed +

No approvers found \$100,000 Fiduciary Approval → No approvers found \$100,000 Fiduciary Approval → Multiple Approvers Error Step

▶ **Comments**

Purchasing Manager Approval

▼ Line 1:Initiated + Start New Path

Wicks Opus 5268

Purchasing Manager Approval

Not Routed +

Saxon, Randall J ePRO PURCHASE MGR APPRVL ALL

▼ Line 2:Initiated + Start New Path

Installation

Purchasing Manager Approval

Not Routed +

Saxon, Randall J ePRO PURCHASE MGR APPRVL ALL

Return
Apply Approval Changes

14. Click **Save & submit**.

Enterprise Information System | mmt0110 on FSTSTU (easapp12) - 02/26/2016 17:08:59

Navigation: Favorites | Main Menu | Employee Self-Service | Procurement | Requisition

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: Pipe Organ for Dr. Turner
 Requisition ID: 000000165
 Requester: E92200 | Business Services-Gen
 Priority: Medium
 *Currency: USD

Buttons: Copy Bid Vendors, Delete Bid Vendors, Refresh

Cart Summary: Total Amount 47,000.00 USD | Add More Items

Expand lines to review shipping and accounting details

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5268			1.0000	Each	32000.0000	32000.00				
<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</p> <p>Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
2	Installation			1.0000	Each	15000.0000	15000.00				
<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</p> <p>Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p>Accounting Lines</p>											

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

Total Amount: 47,000.00 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

This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.

Check Budget | Pre-Check Budget | Budget Checking Status: Valid

Save & submit | Save for Later | Add More Items | Preview Approvals

Note: The Confirmation screen will open.

Confirmation

Your requisition has been submitted.

Requested For Business Services-Gen	Number of Lines 2
Requisition Name Pipe Organ for Dr. Turner	Total Amount 47,000.00 USD
Requisition ID 000000165	Approval Justification
Business Unit SY789	This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.
Status Open	
Priority Medium	
Budget Status Not Checked	

View printable version Edit This Requisition Check Budget Pre-Check Budget

Purchasing Approval

▼ Pipe Organ for Dr. Turner:Initiated Start New Path

UNTS Buyer Approval

Not Routed
Multiple Approvers Purchasing Approval

UNTS Dept ID - ePro

▼ Line 1:Initiated Start New Path

Wicks Opus 5288

UNTS Department Approval

Not Routed
Saxon,Randall J
Inserted Approver

Not Routed
Asher,Donna Brooks
Manager Fiduciary Approval

▼ Line 2:Initiated Start New Path

Installation

UNTS Department Approval

Not Routed
Asher,Donna Brooks
Manager Fiduciary Approval

UNTS A & B approver - ePro

▼ Line 1:Initiated View/Hide Comments Start New Path

Wicks Opus 5288

UNTS A & B Department Approval

Skipped
No approvers found
\$100,000 Fiduciary Approval

Skipped
No approvers found
\$100,000 Fiduciary Approval

Not Routed
Multiple Approvers
Error Step

Comments

Purchasing Manager Approval

▼ Line 1:Initiated Start New Path

Wicks Opus 5288

Purchasing Manager Approval

Not Routed
Saxon,Randall J
ePRO PURCHASE MGR APPRVL ALL

▼ Line 2:Initiated Start New Path

Installation

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](#).