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

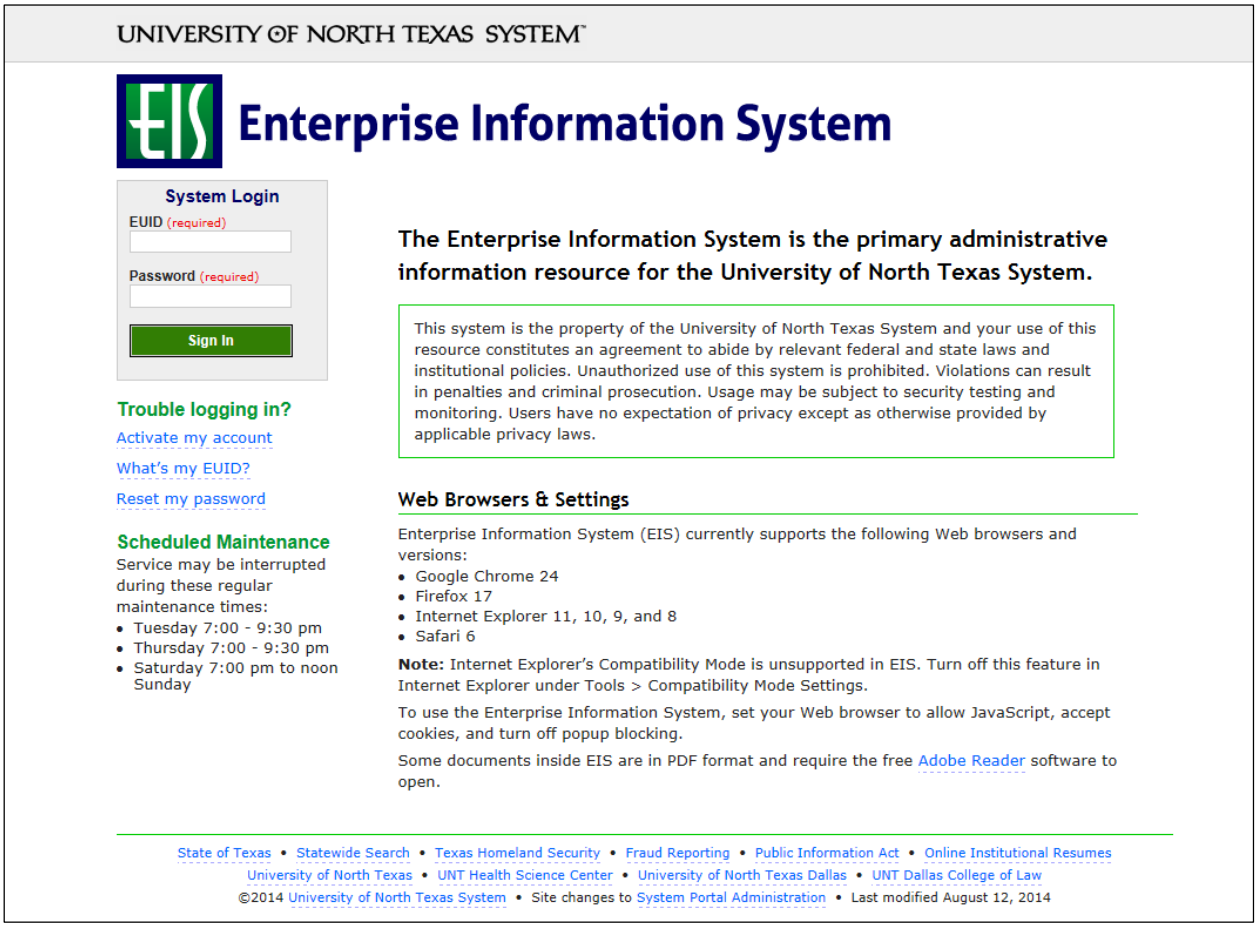
Title: Purchases Over $25,000.00

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.

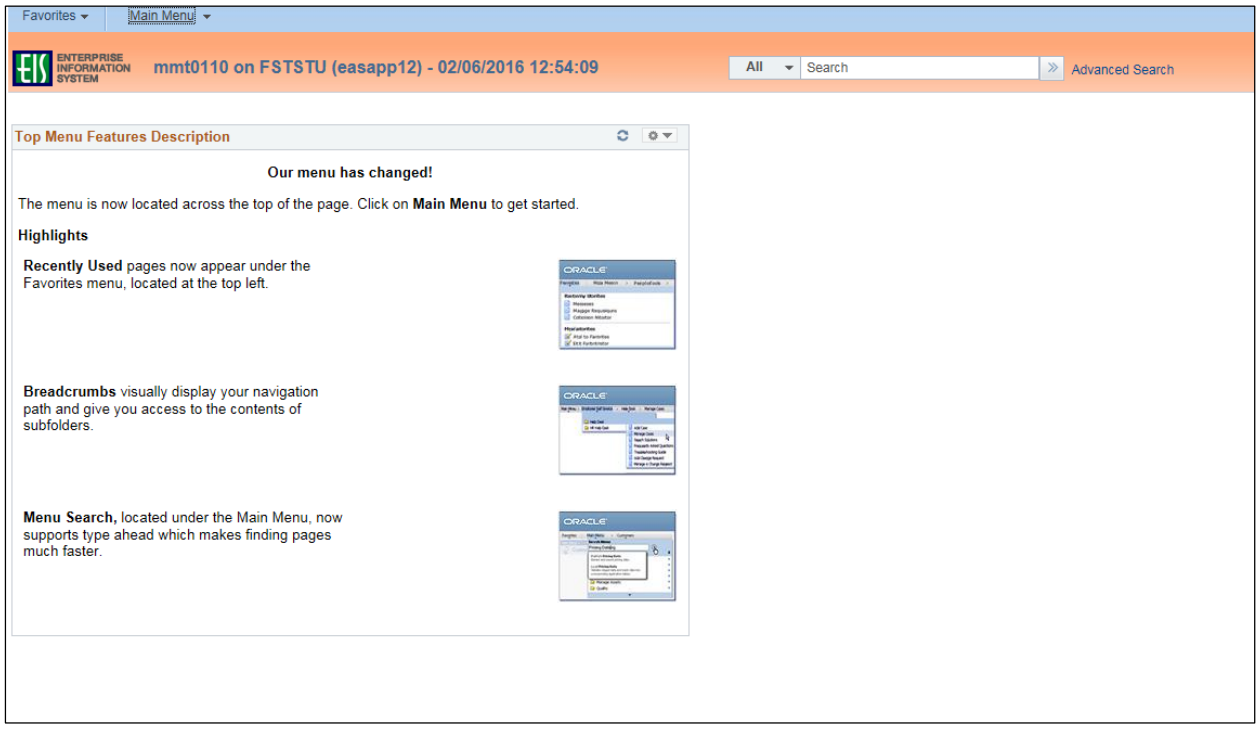
Setting up the Requisition

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

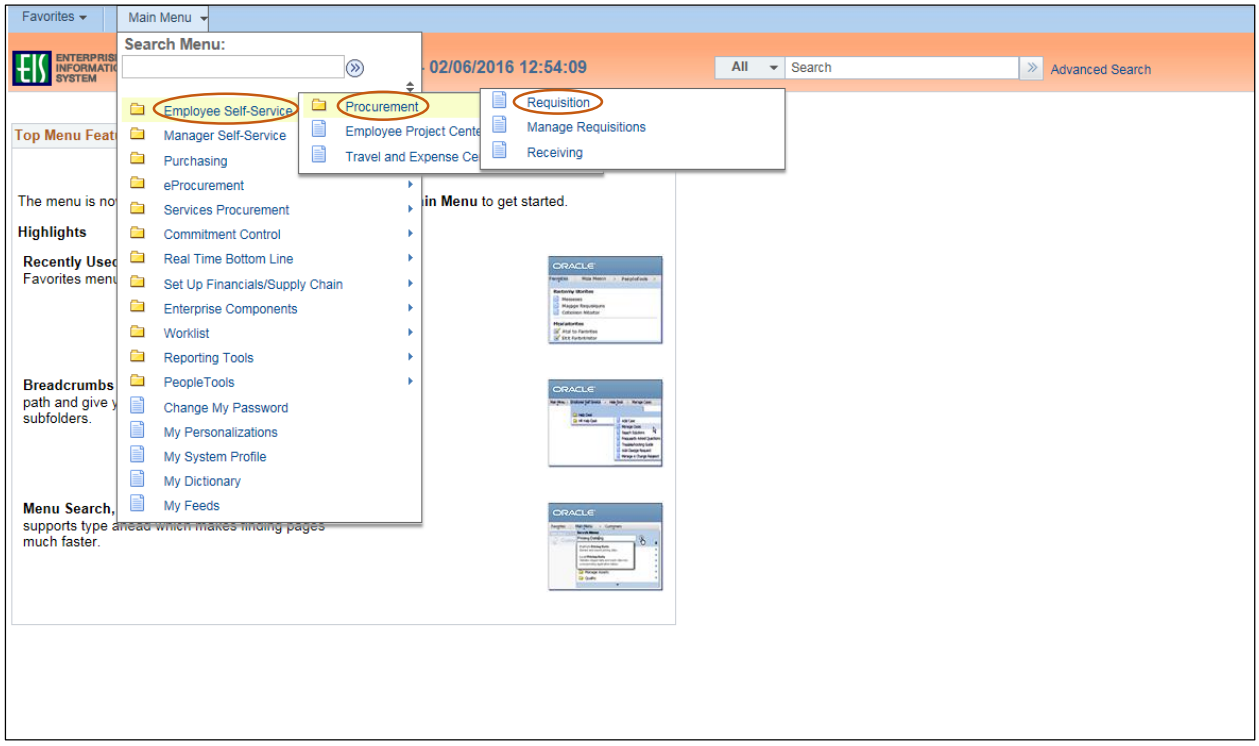
1. Complete Request for Formal Solicitation form, providing the scope of work and product/service specifications.
2. Enter **EUID** and **Password**.
3. Click **Sign In**.



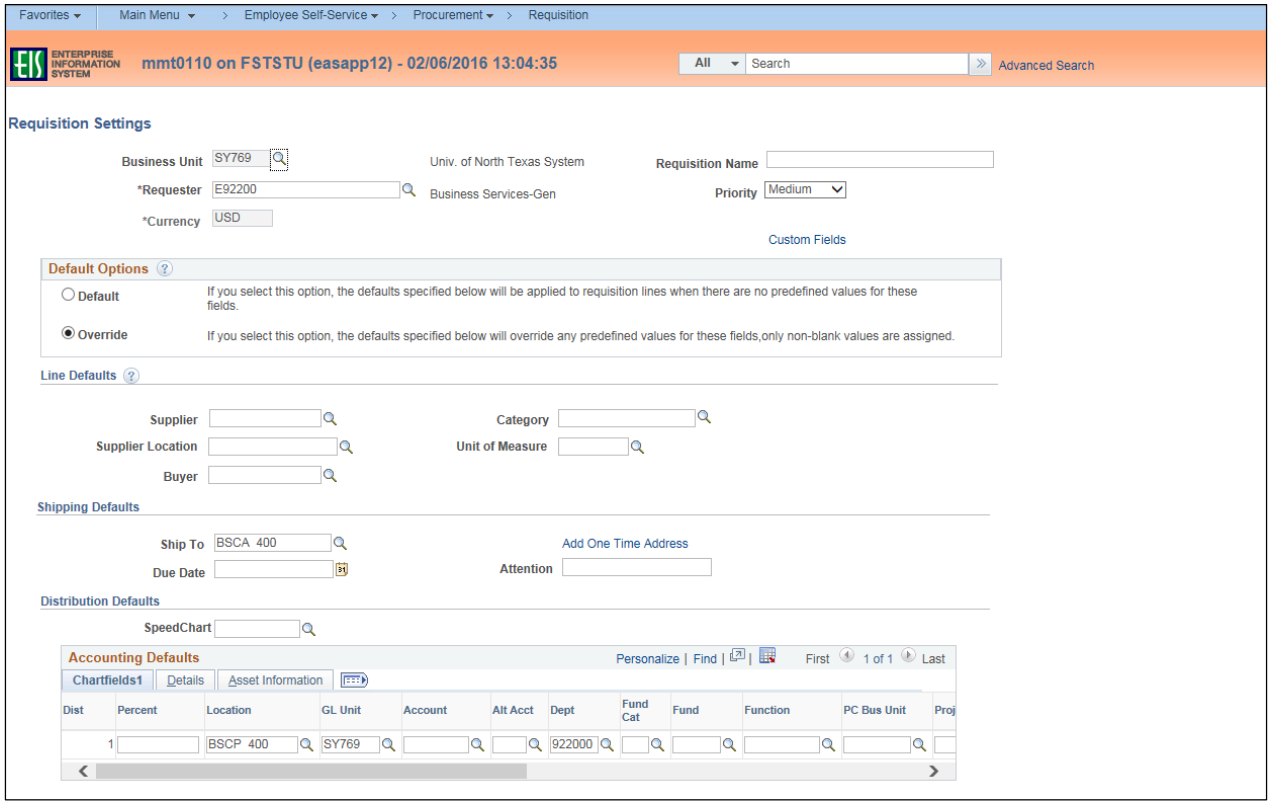
4. Click **Main Menu**.



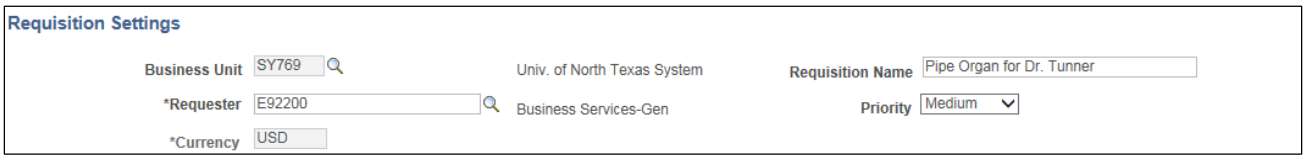
5. Navigate to **Requisition** by clicking on Employee Self-Service>Procurement>Requisition.



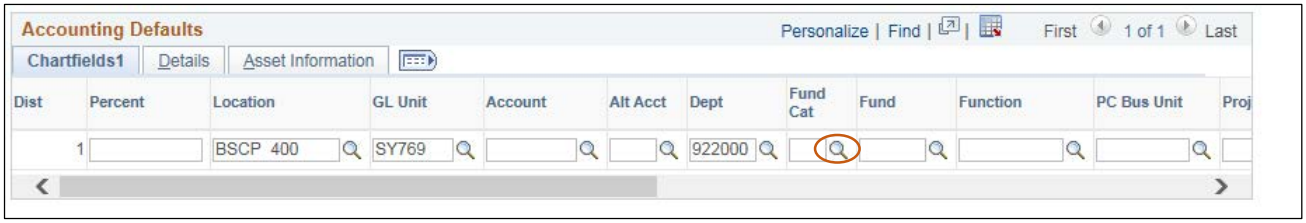
6. Verify that the information in the **Business Unit** and **Requester** fields is correct.
   Note: Supplier information should not be completed as the vendor will be selected based on the formal bid process conducted by Procurement Services.



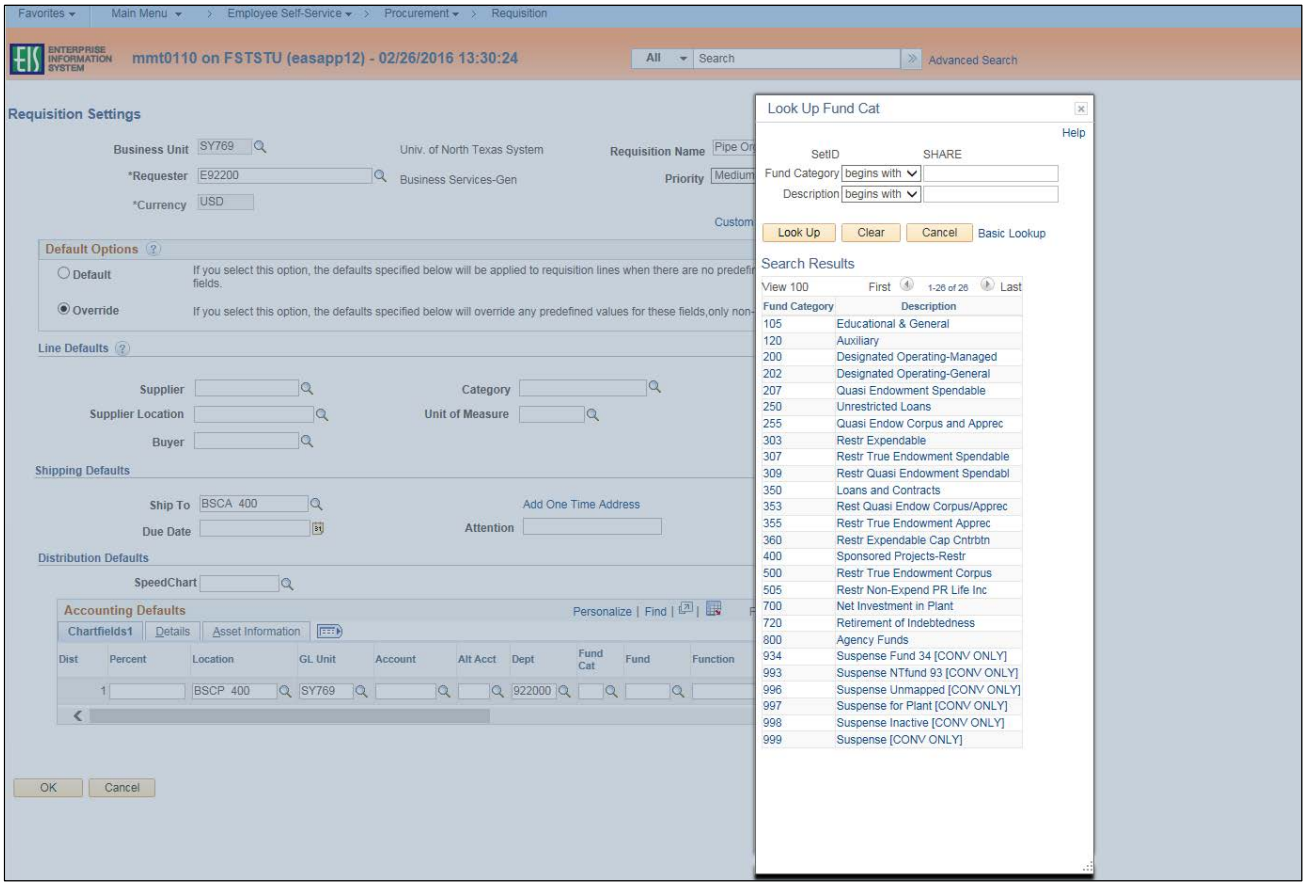
7. Enter **Requisition Name**.
   Note: Give the requisition a meaningful name, as it will be visible when using **Manage Requisitions**.



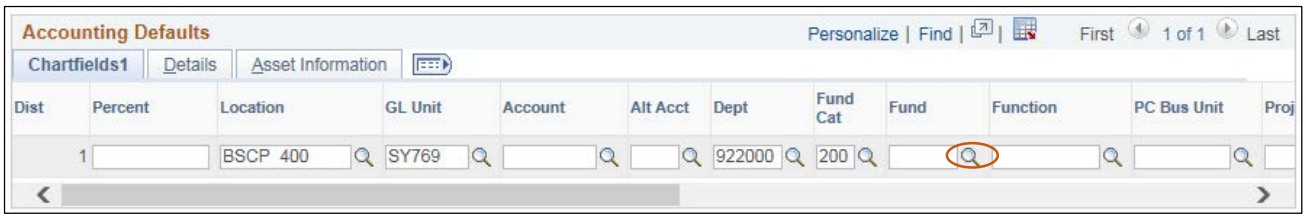
8. Click on the magnifying glass next to **Fund Cat**.
   Note: **Account** and **Alt Acct** should remain blank. These fields will be completed later.



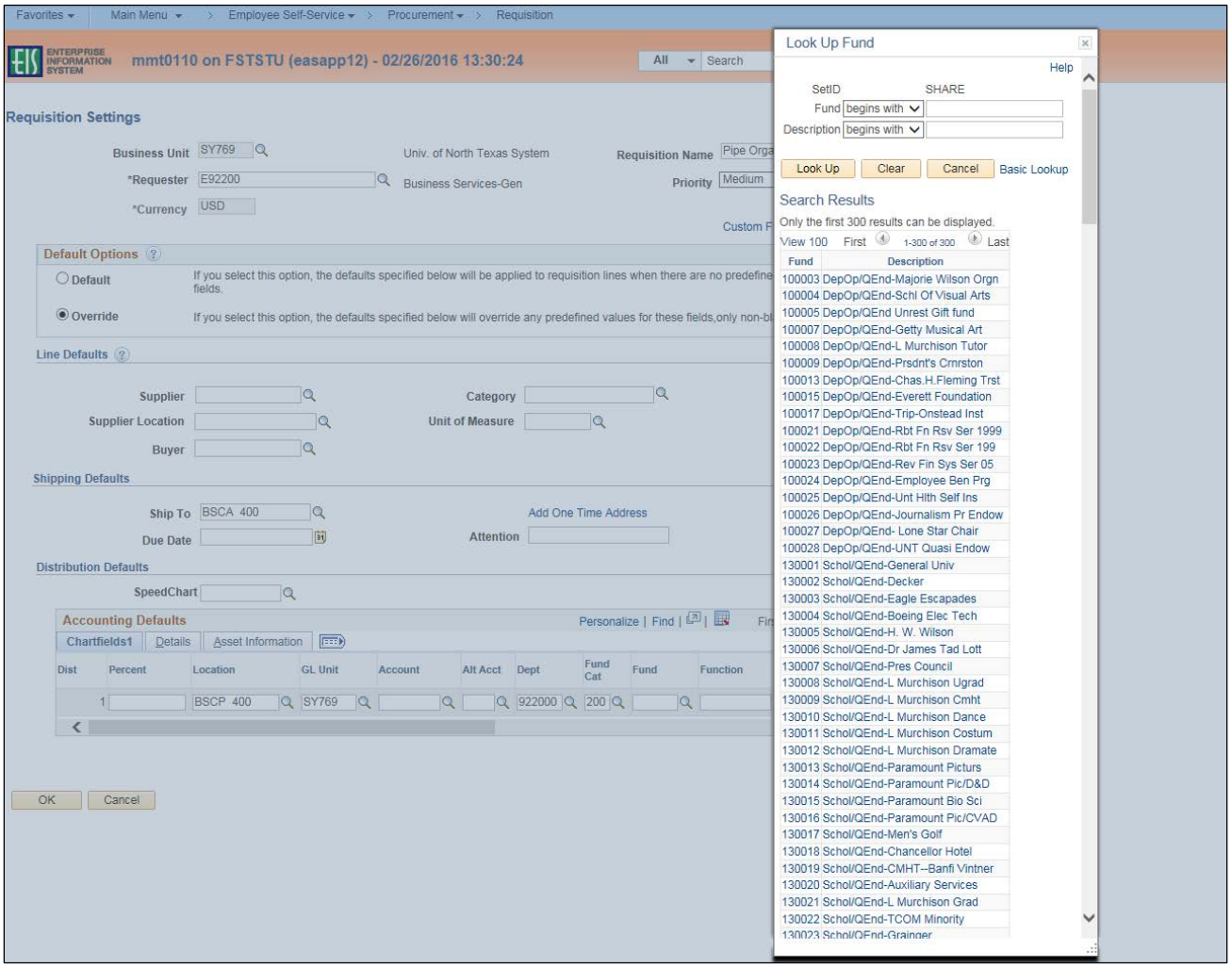
9. Select the appropriate **Fund Cat** from the **Look Up Fund Cat** dropdown.



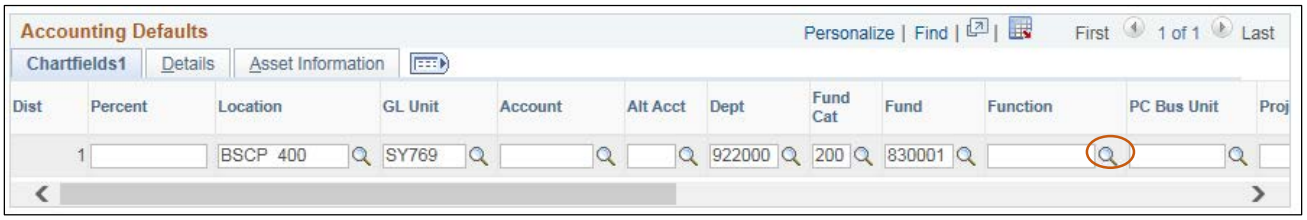
10. Click on the magnifying glass next to **Fund**.



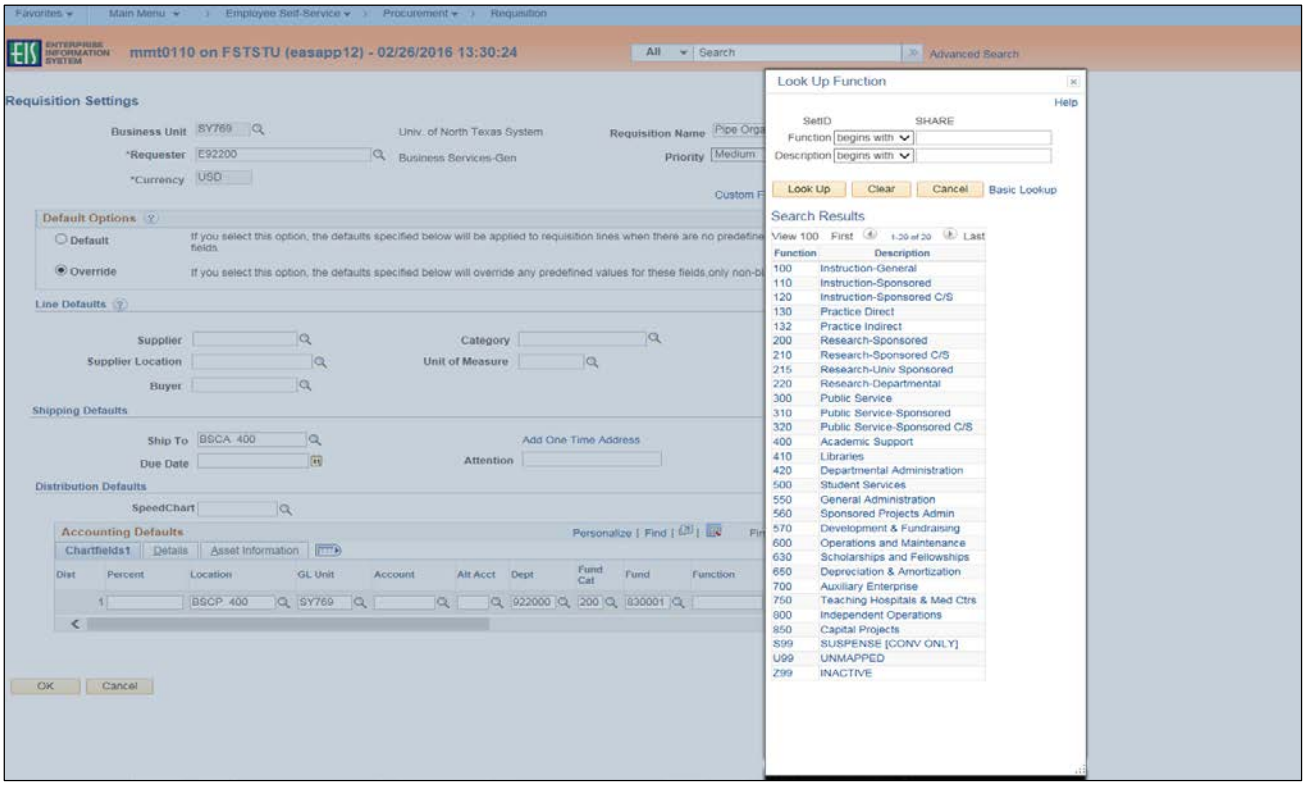
11. Select the appropriate **Fund** from the **Look Up Fund** dropdown.



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

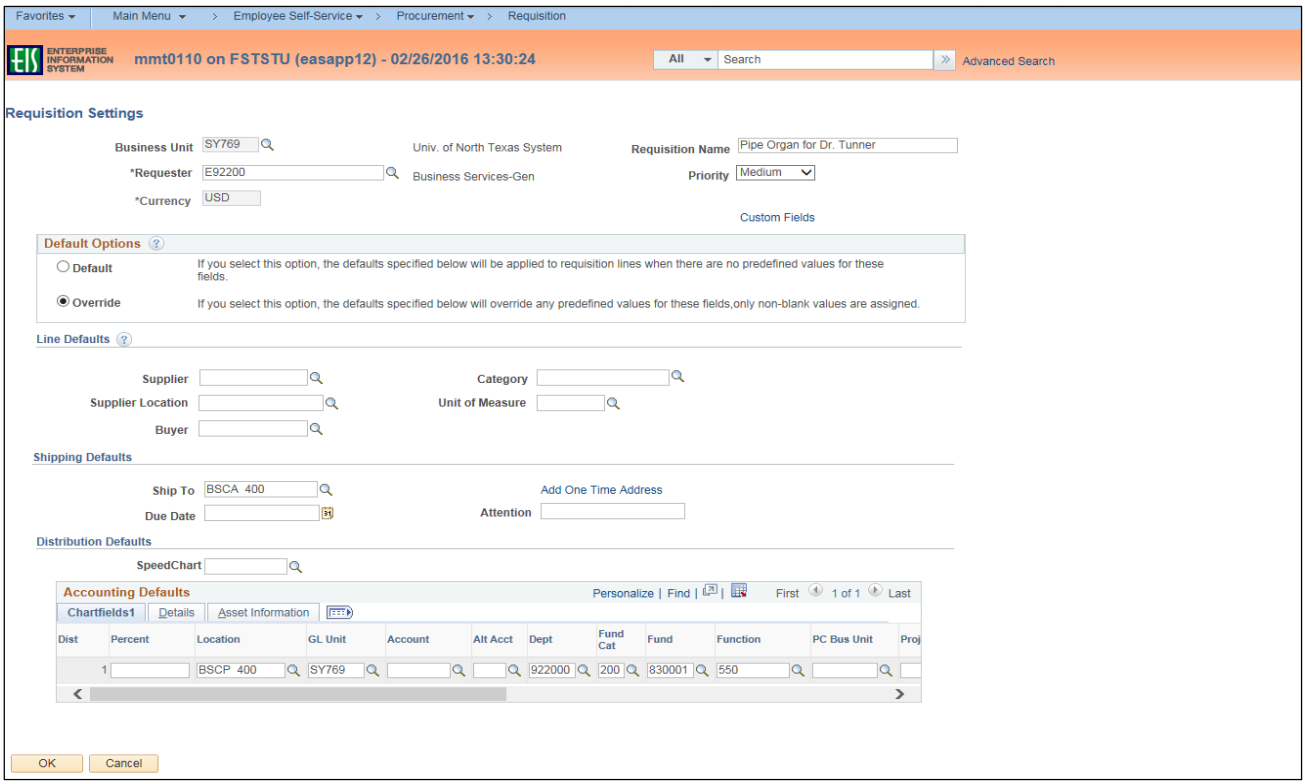


13. Select the appropriate **Function** from the **Look Up Function** dropdown.



14. Click **OK**.

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



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:

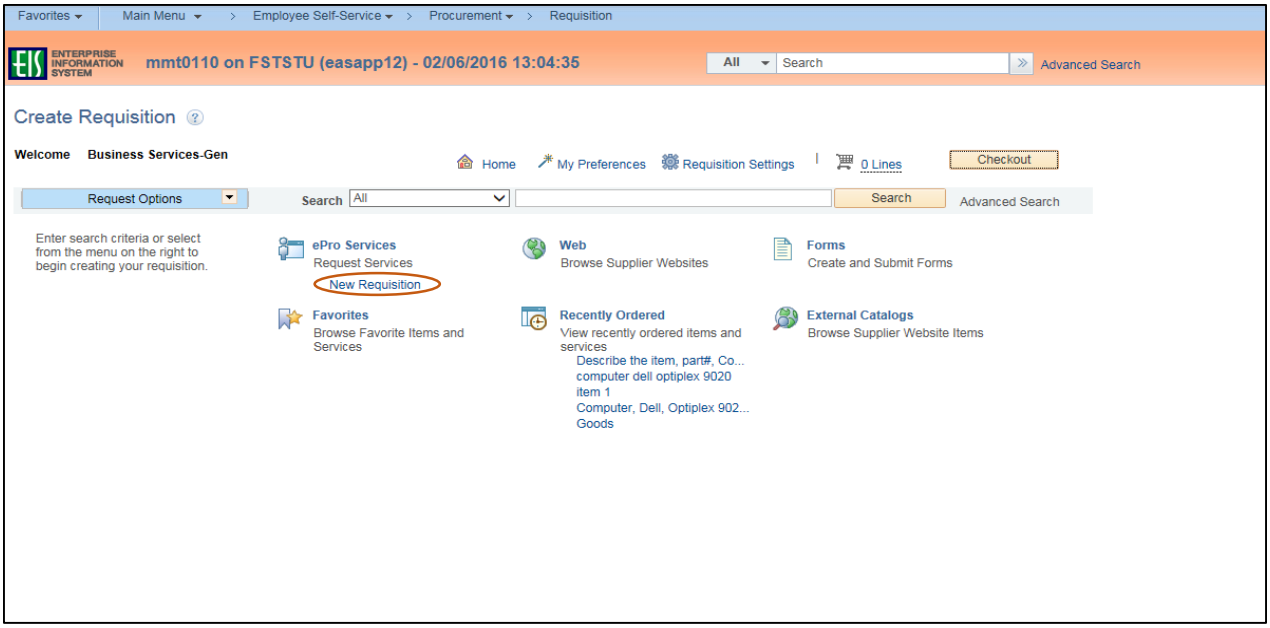
- ✓ Department contact full name, full phone number & email.
- ✓ Any special requirements or handling requests (ex. Where to email order).
- ✓ Service dates and/or date needed.
- ✓ Reference full name and contract number of any Co-operative contracts, if applicable.
- ✓ Note if sole source, proprietary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

Track order using **Manage Requisitions**.

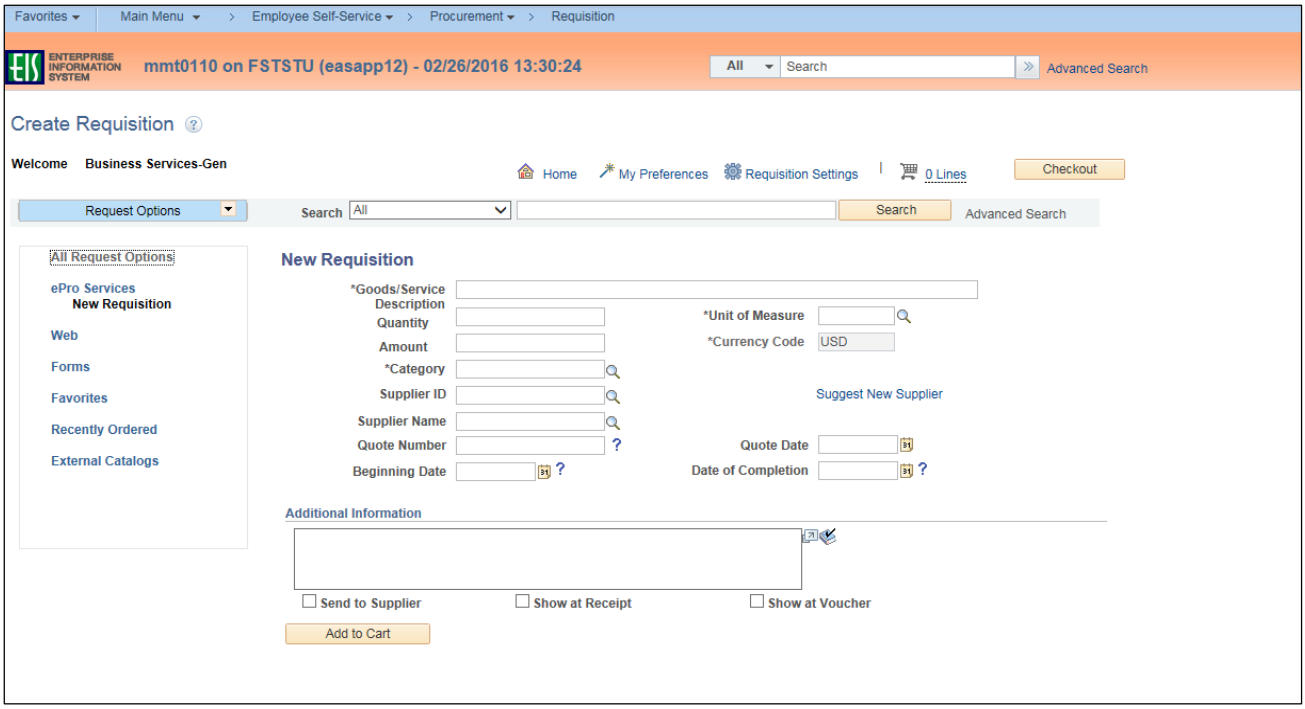
Creating the Requisition

To create the requisition, follow the steps below before moving on to the next phase of reviewing requisition details.

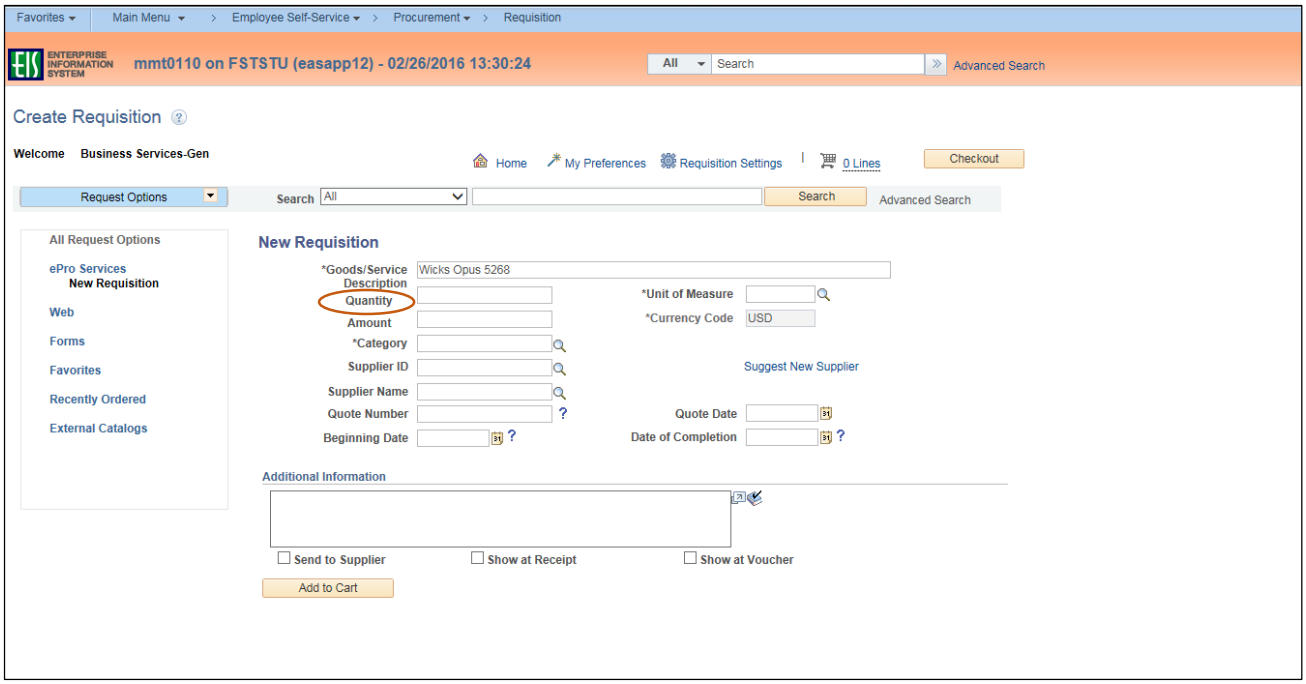
1. Click **New Requisition** under the **ePro Services** section.



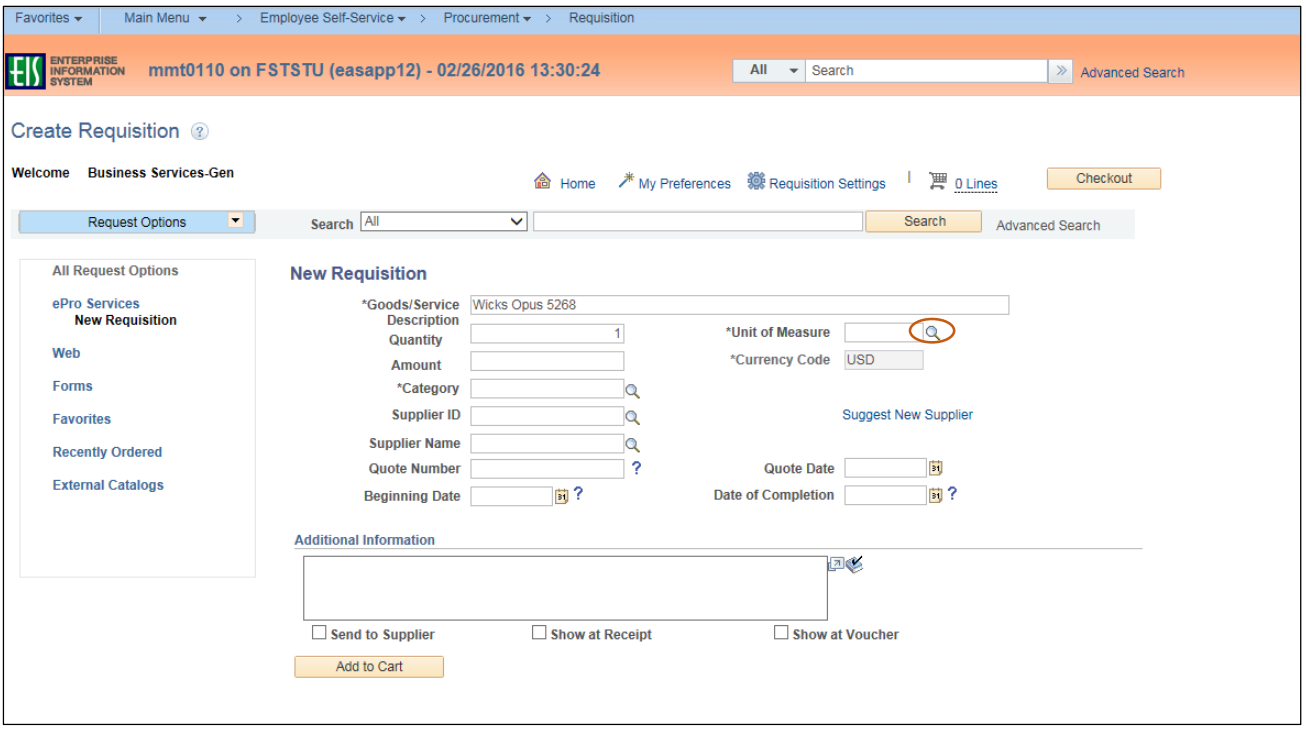
2. Enter the description of the good or service in the **Goods/Service Description** field.
   Note: Descriptions should be concise, but complete and should include the part number, catalog number, or model number if available, along with a detailed description.



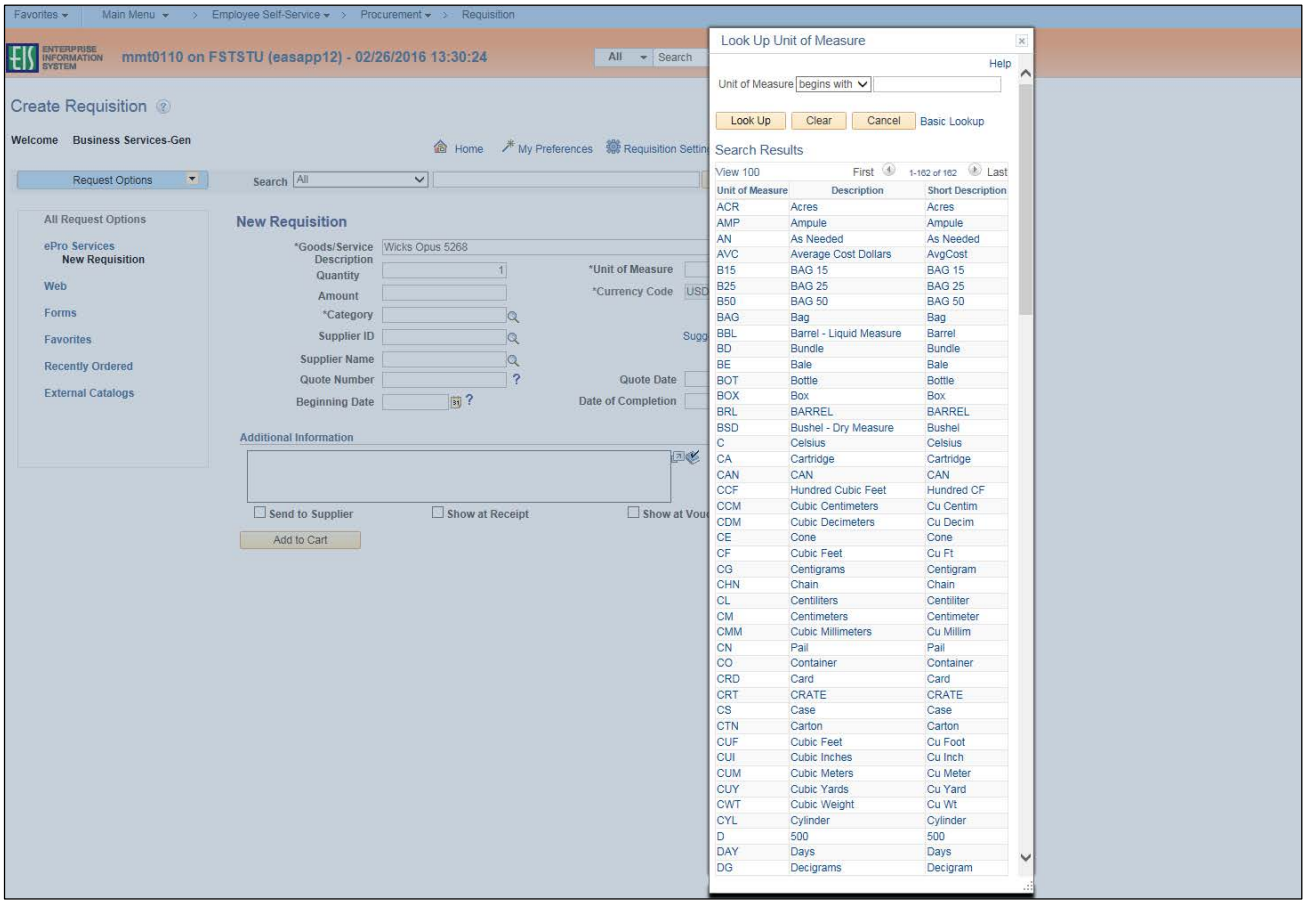
3. Type the number of items in **Quantity** field.



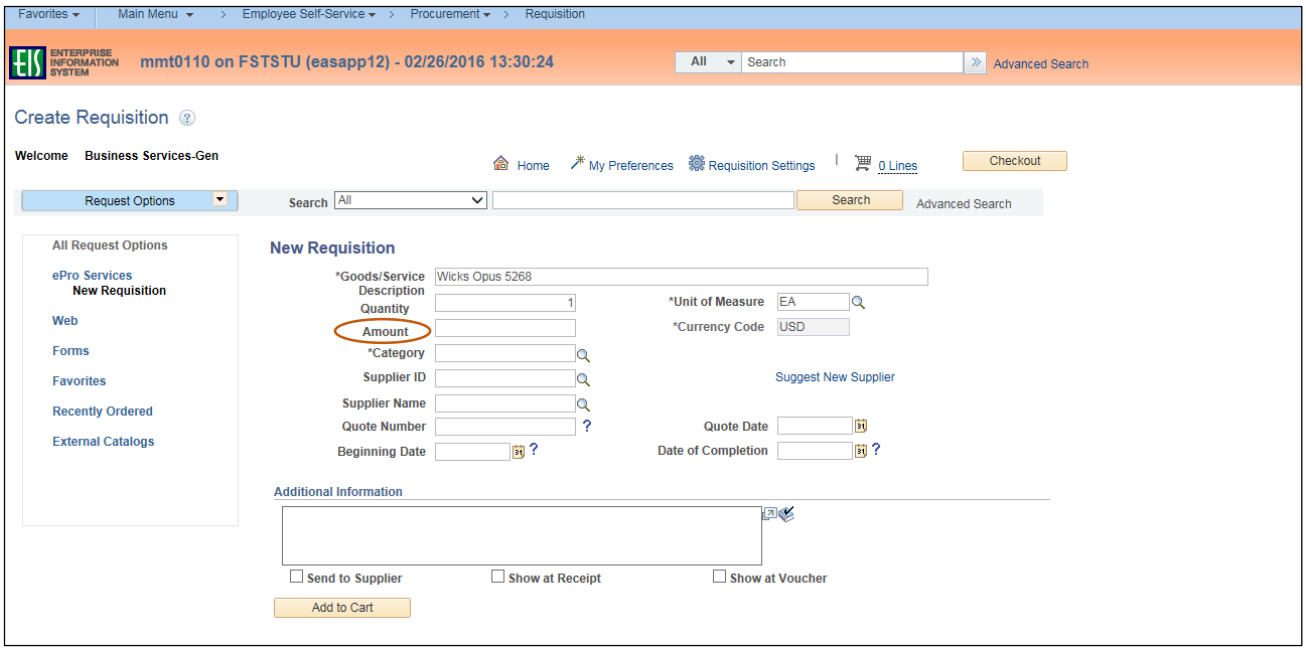
4. Click the magnifying glass next to the **Unit of Measure** field.
   Note: **Unit of Measure** can be typed directly in the field without using the lookup feature.



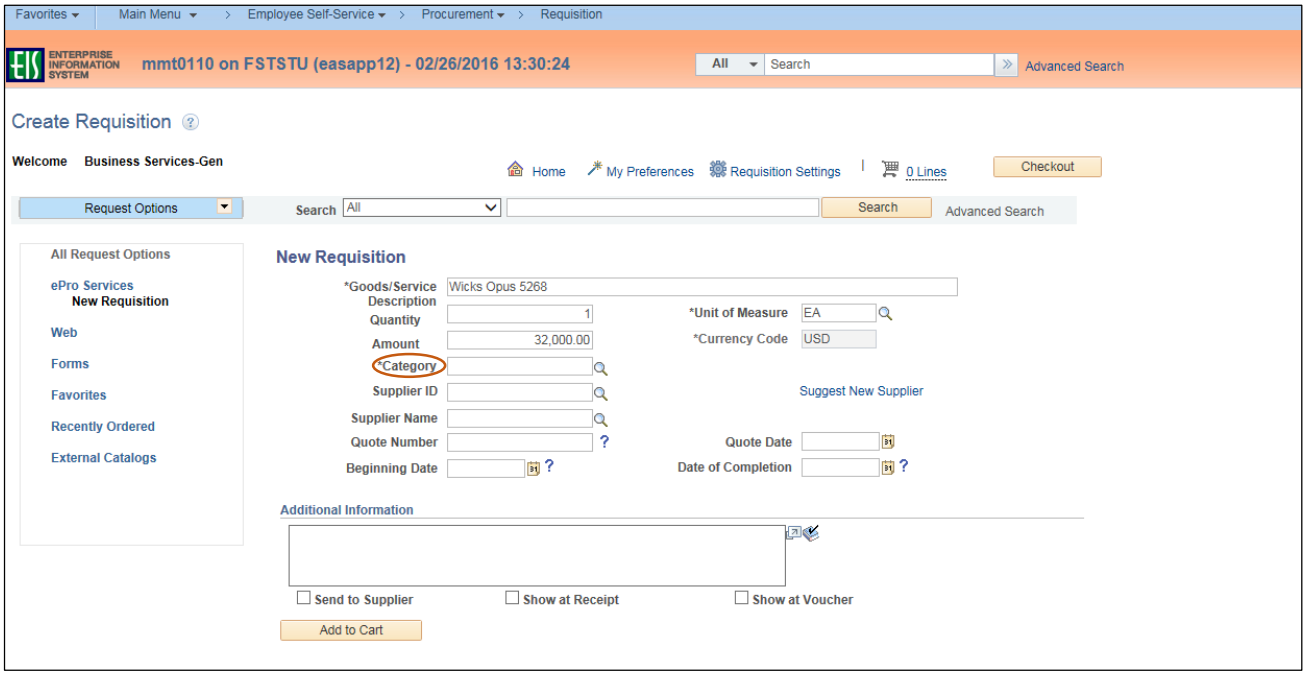
5. Select the appropriate **Unit of Measure** from **Look Up Unit of Measure** dropdown.



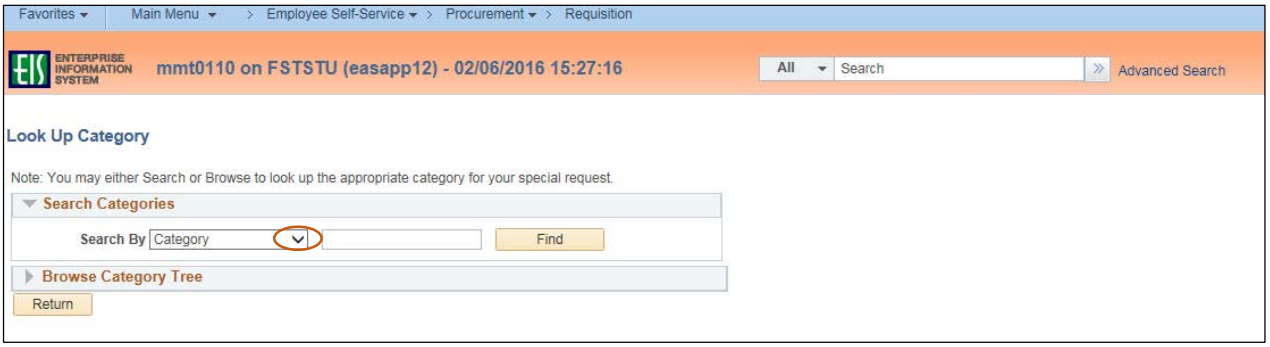
6. Enter an estimated dollar amount for the good or service in the **Amount** field.



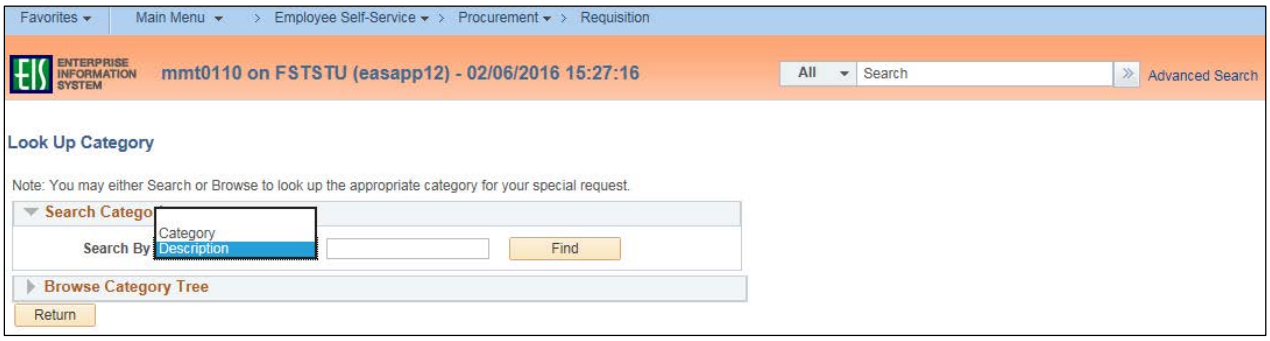
7. Click on the magnifying glass next to the **Category** field.



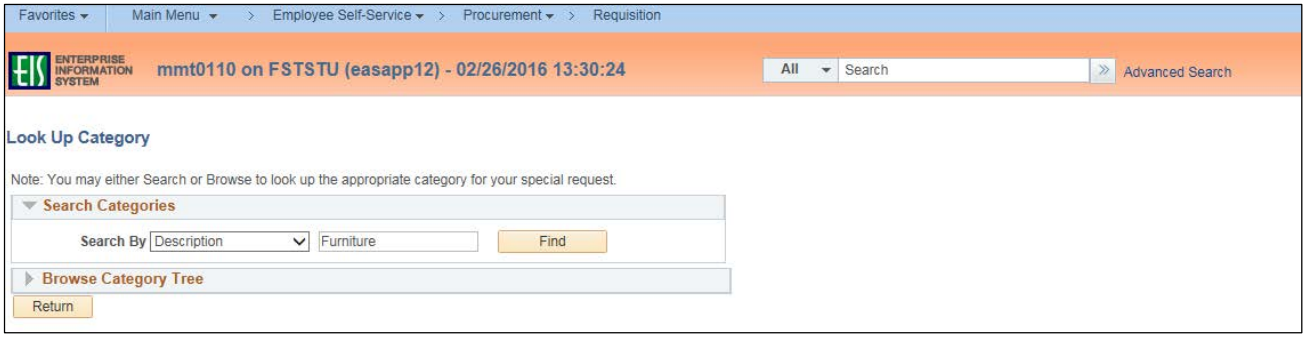
8. Click on the dropdown arrow next to **Category** to open **Search By** options.



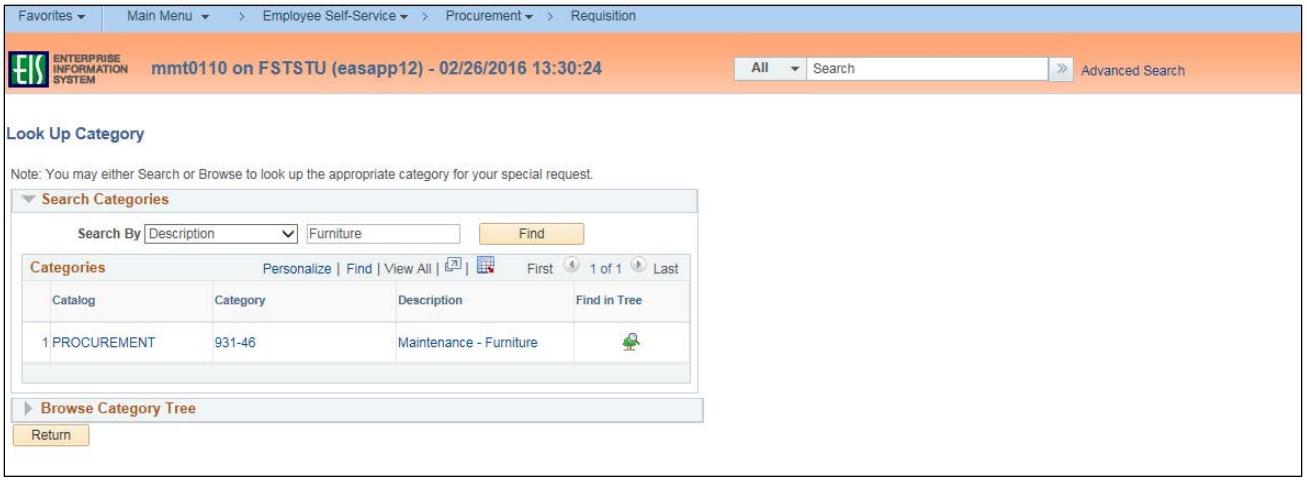
9. Select **Description** from the **Search By** dropdown menu.
10. Type a word to search in the empty field next to **Description**.
    Note: A partial word can be used. Do not use multiple words. If no word is entered, the entire **Category** or **Description** list will be available to view in the dropdown.



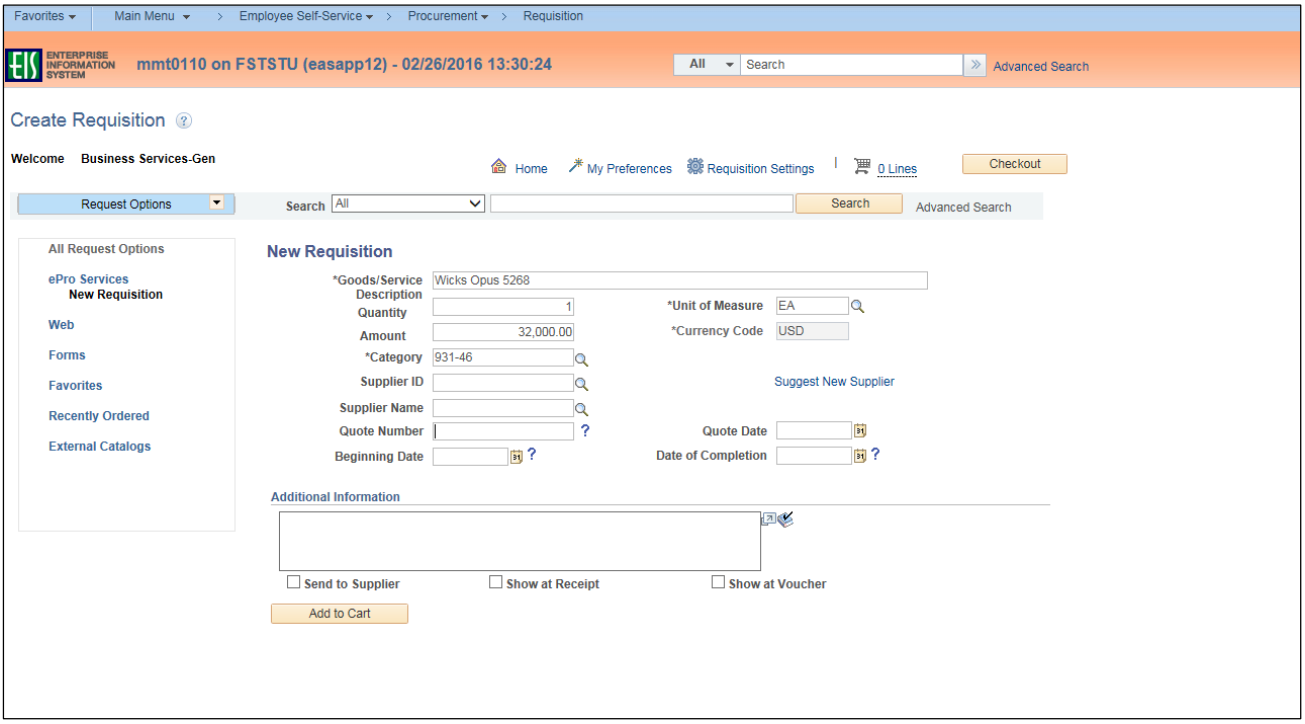
11. Click **Find**.



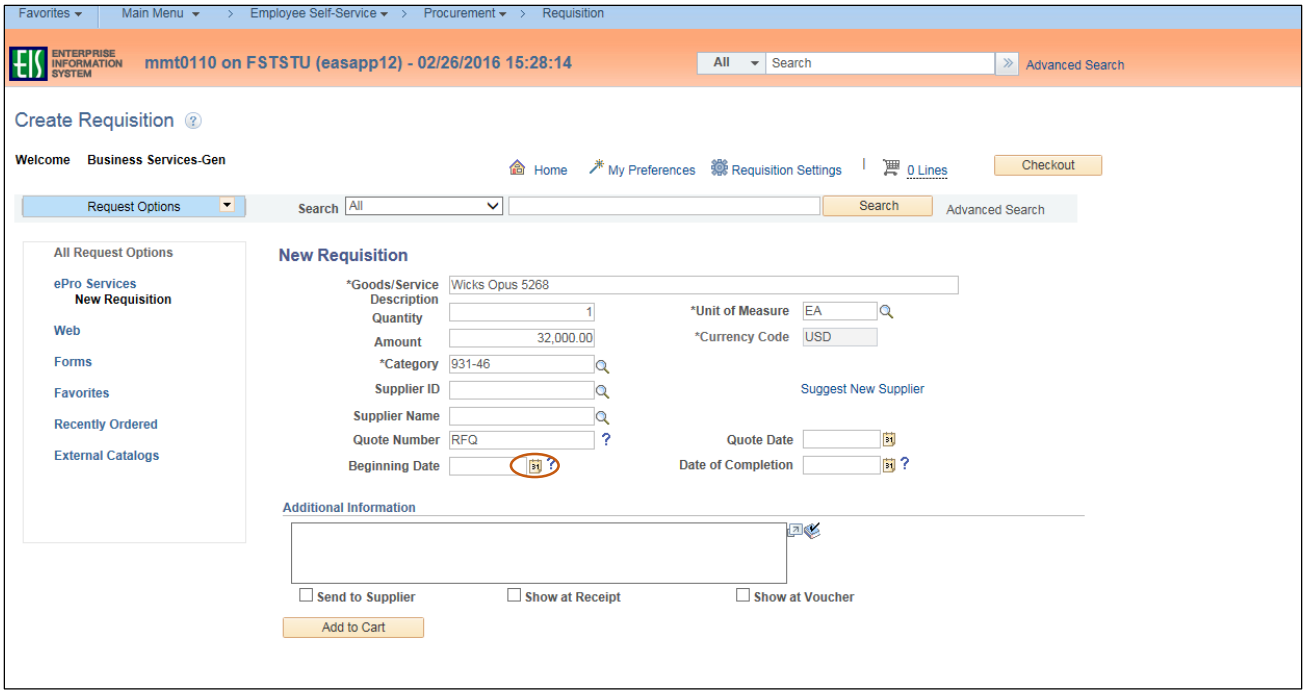
12. Click on the appropriate **Category** based on the **Description** field.
    Note: Select the category code that best describes the purchase. Accuracy is important as **Category** drives **Account** and **Alt Acct** expenditure codes. Choosing the correct **Category** also allows special approvers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



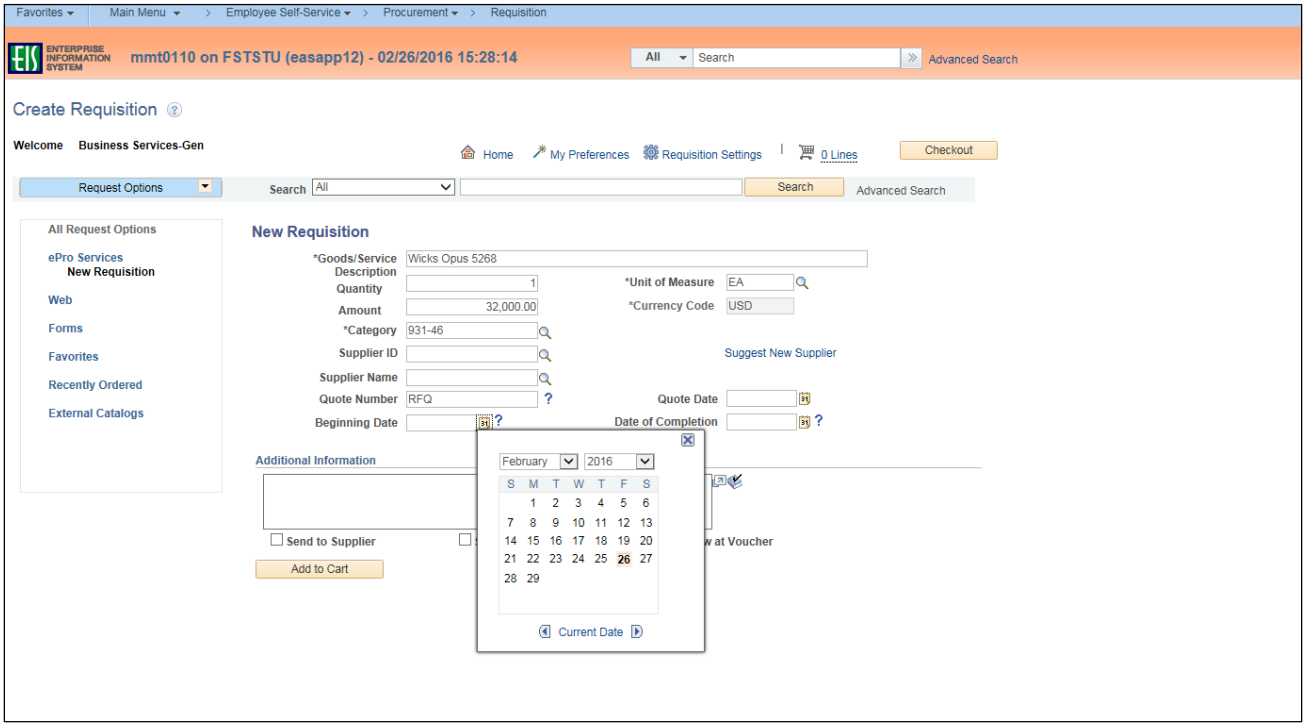
13. Enter “RFQ” in the **Quote Number** field.



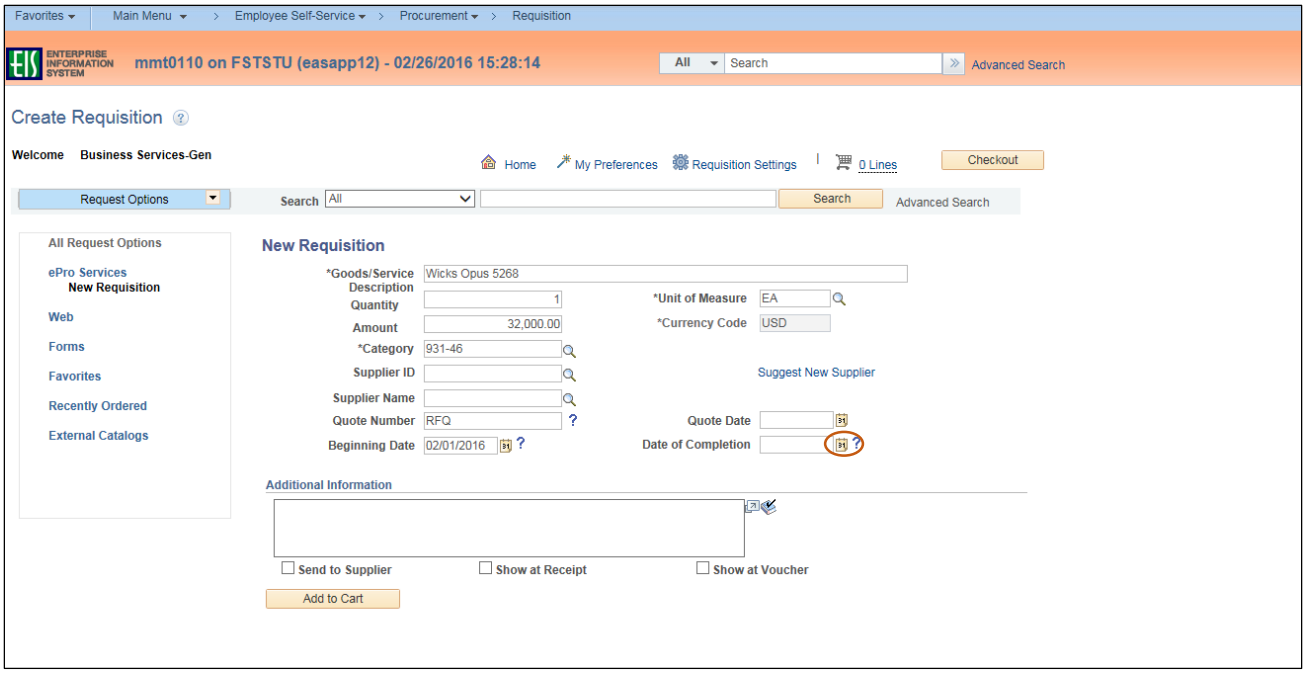
14. Enter **Beginning Date** by clicking on calendar icon.



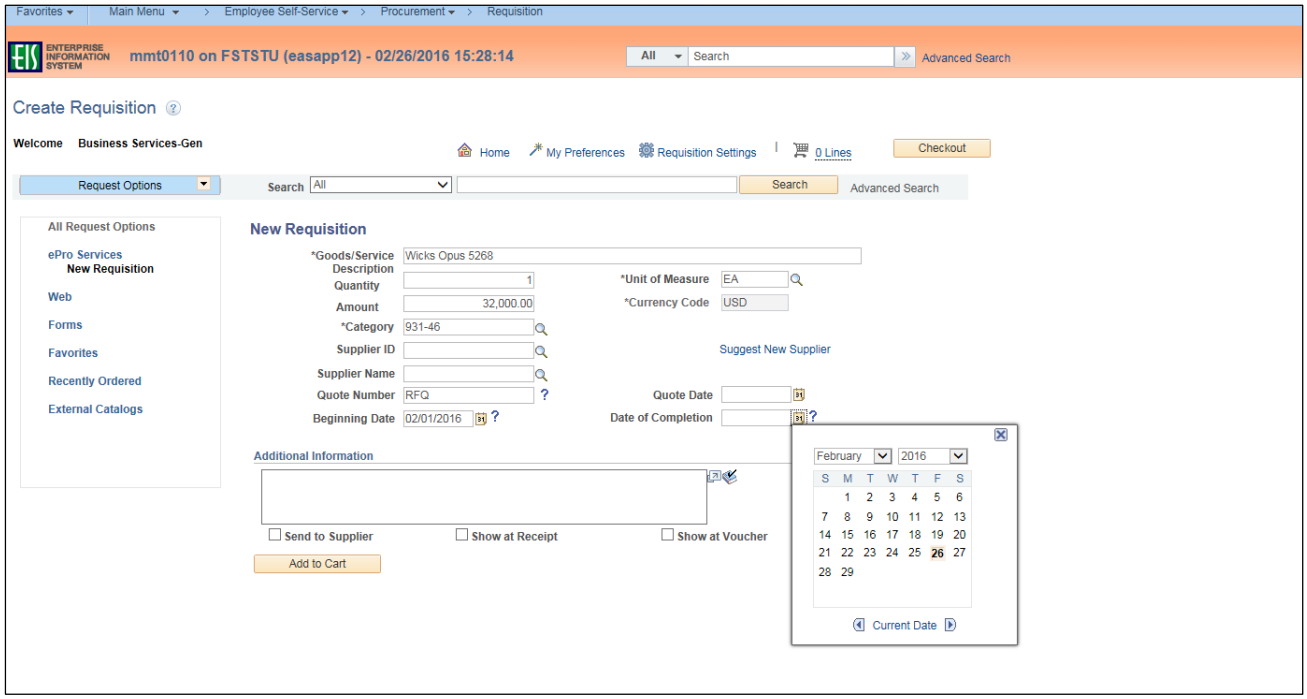
15. Select the appropriate date based on whether ordering Goods or Services.



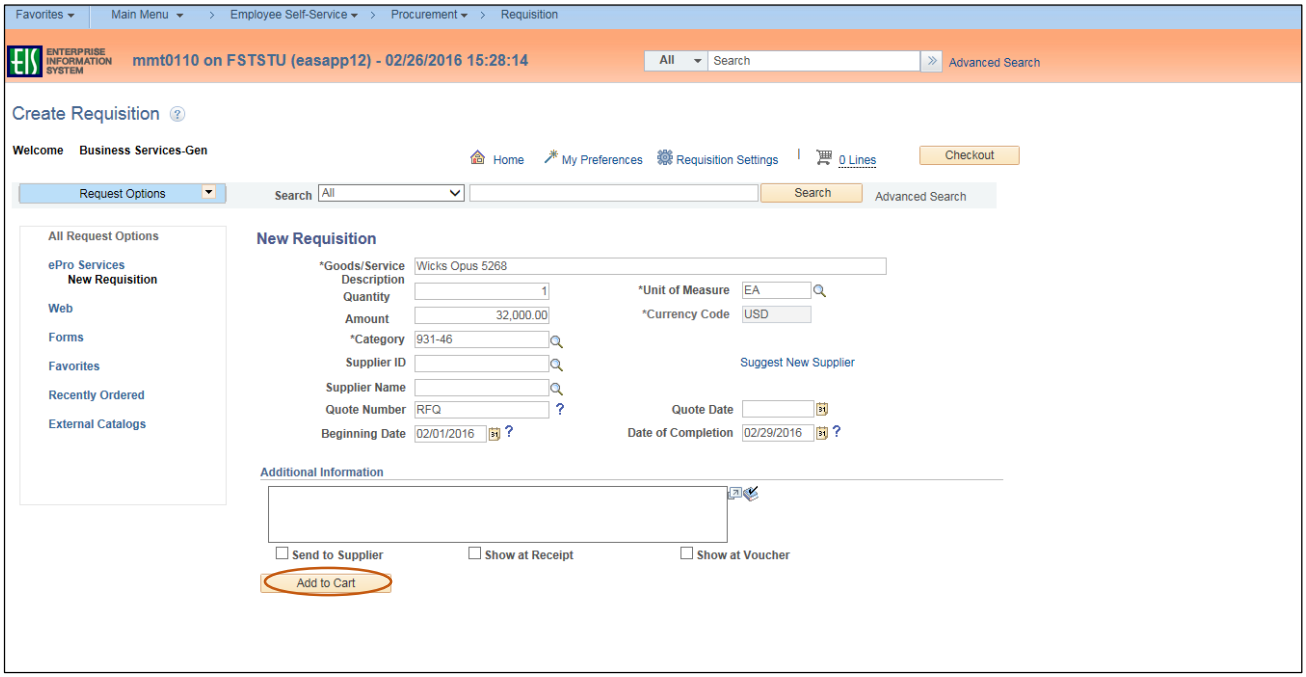
16. Enter the **Date of Completion** by clicking on the calendar icon.



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.

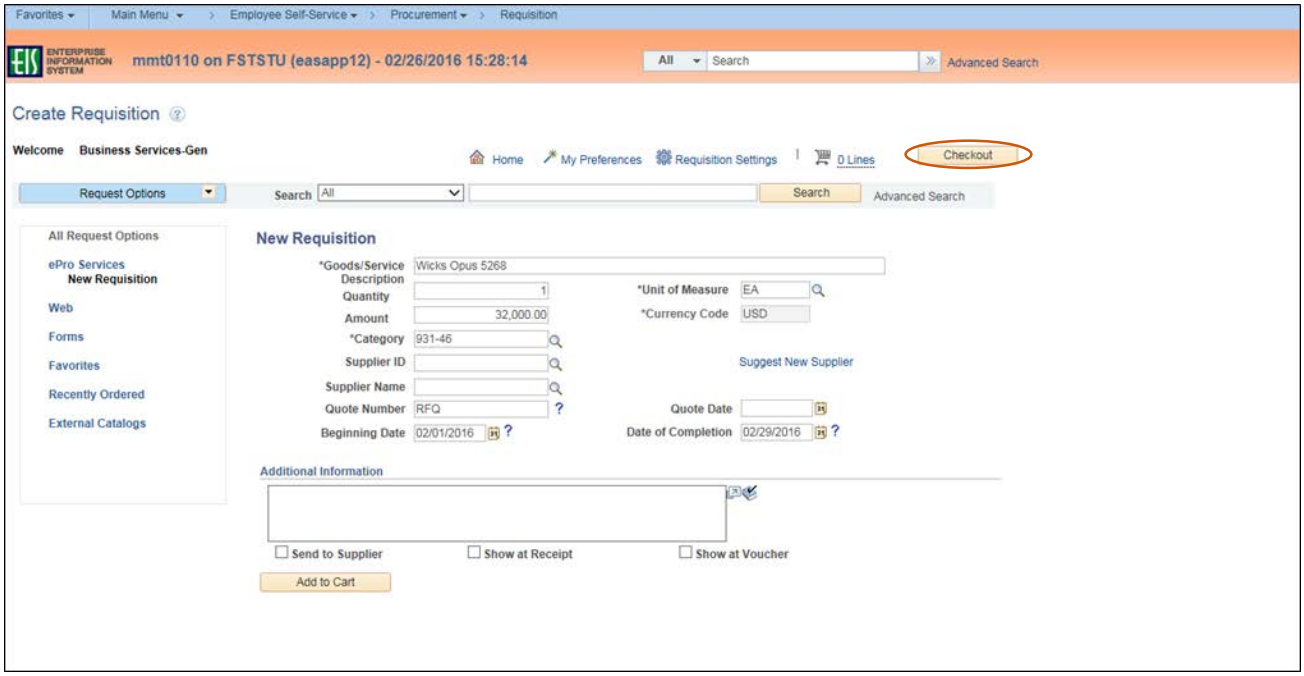


18. Type any necessary information in the **Additional Information** field.
19. Click **Add to Cart**.
20. Repeat steps 2-19 for each item to be purchased.



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

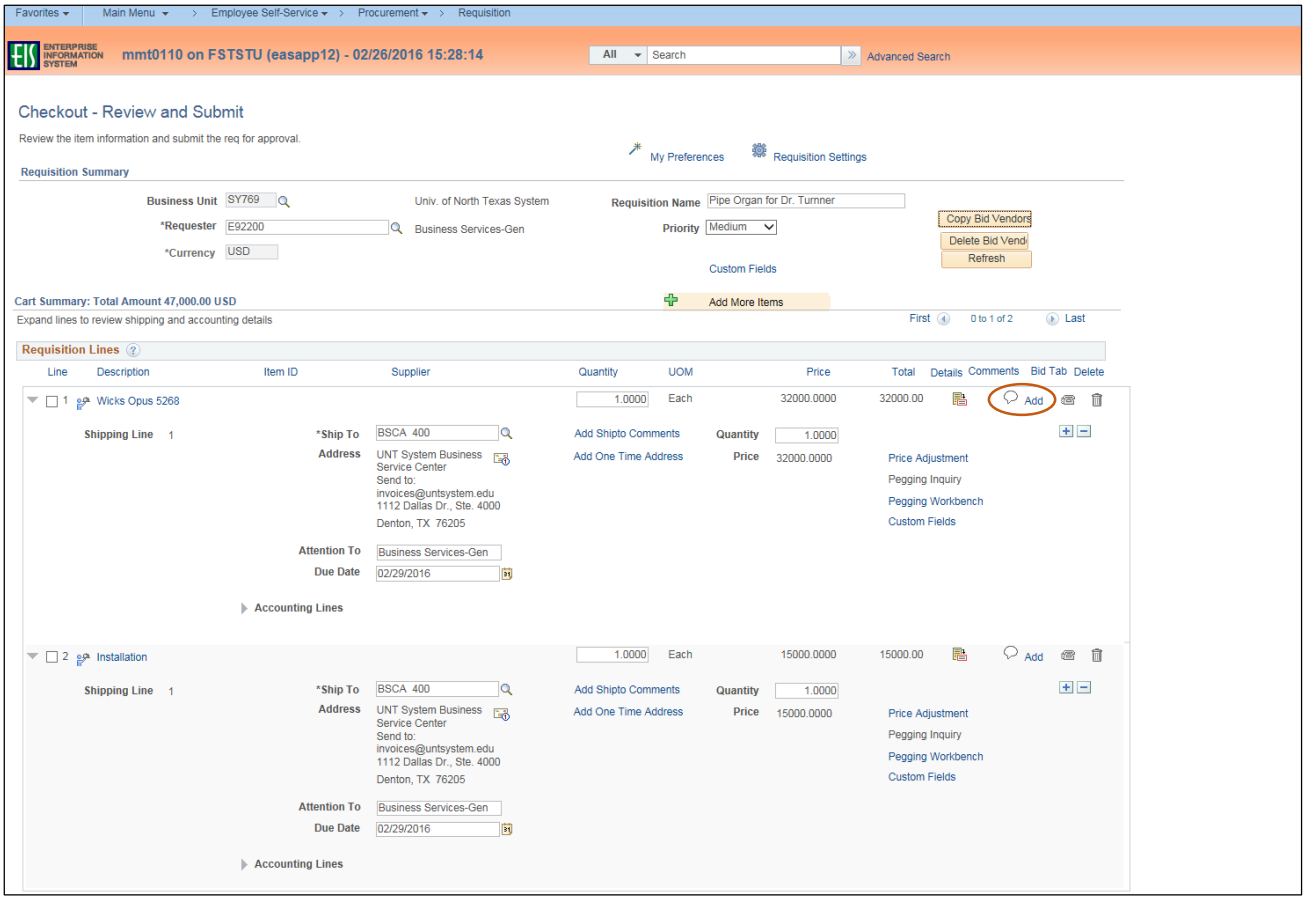
21. Click **Checkout** when order is complete.



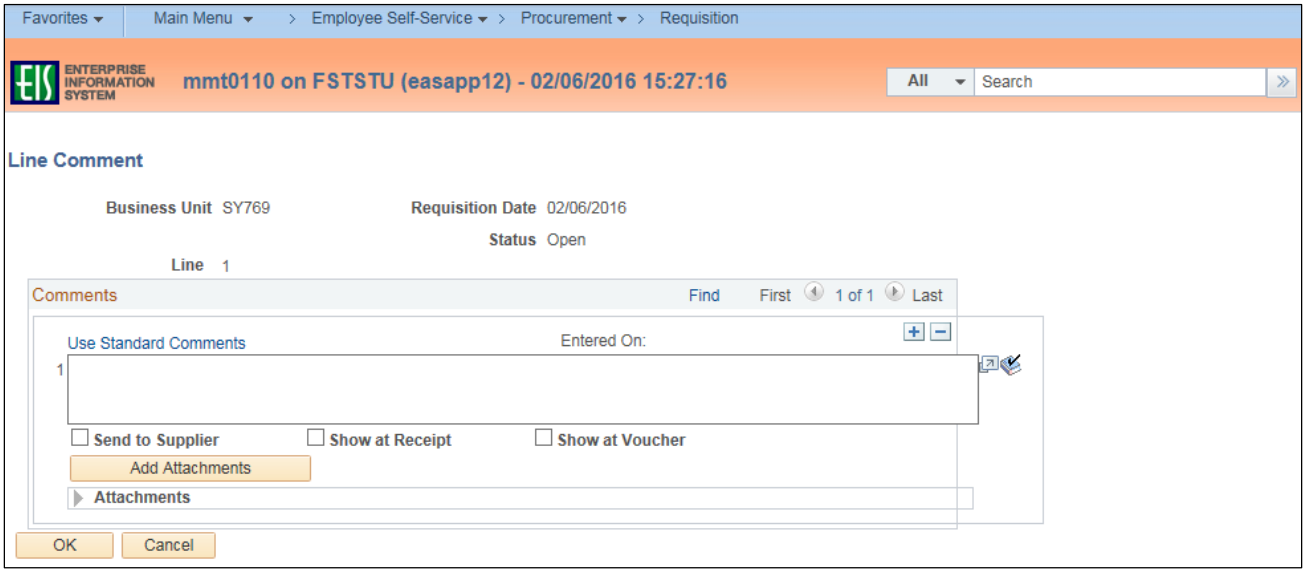
Reviewing Requisition Details

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

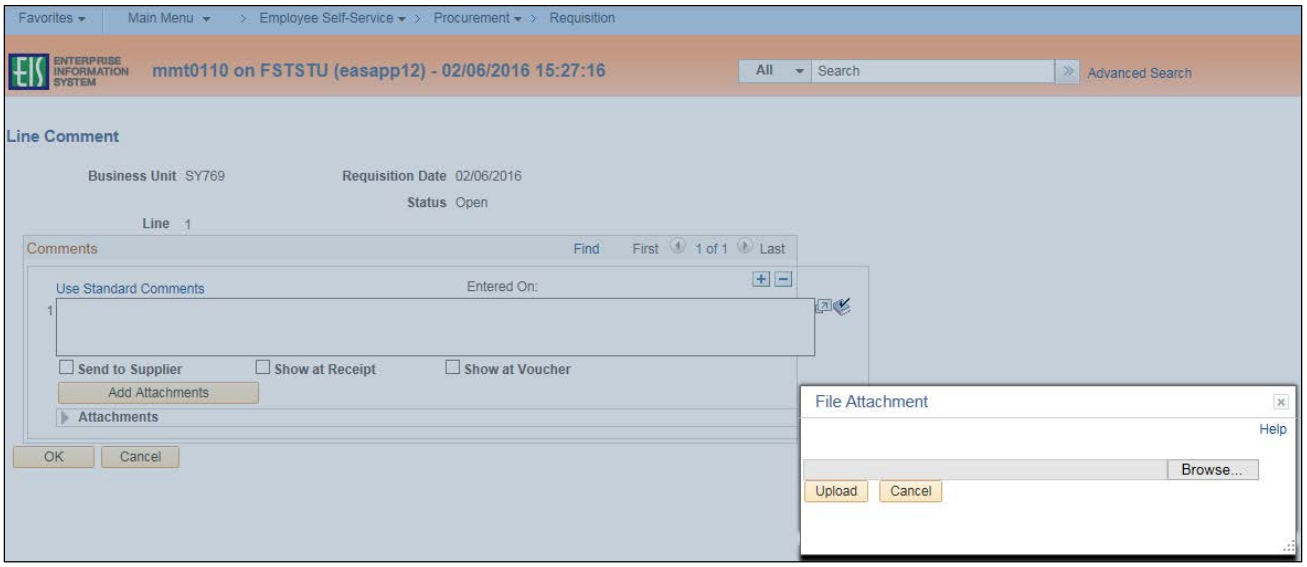
1. Review the **Requisition Line** items on the **Checkout – Review and Submit** screen to ensure the information is correct and complete.
   Note: Click on **Add More Items** if additional line items need to be added. This will return you back to step 2 of **Creating a Requisition**.
2. Click the **Comment** 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.



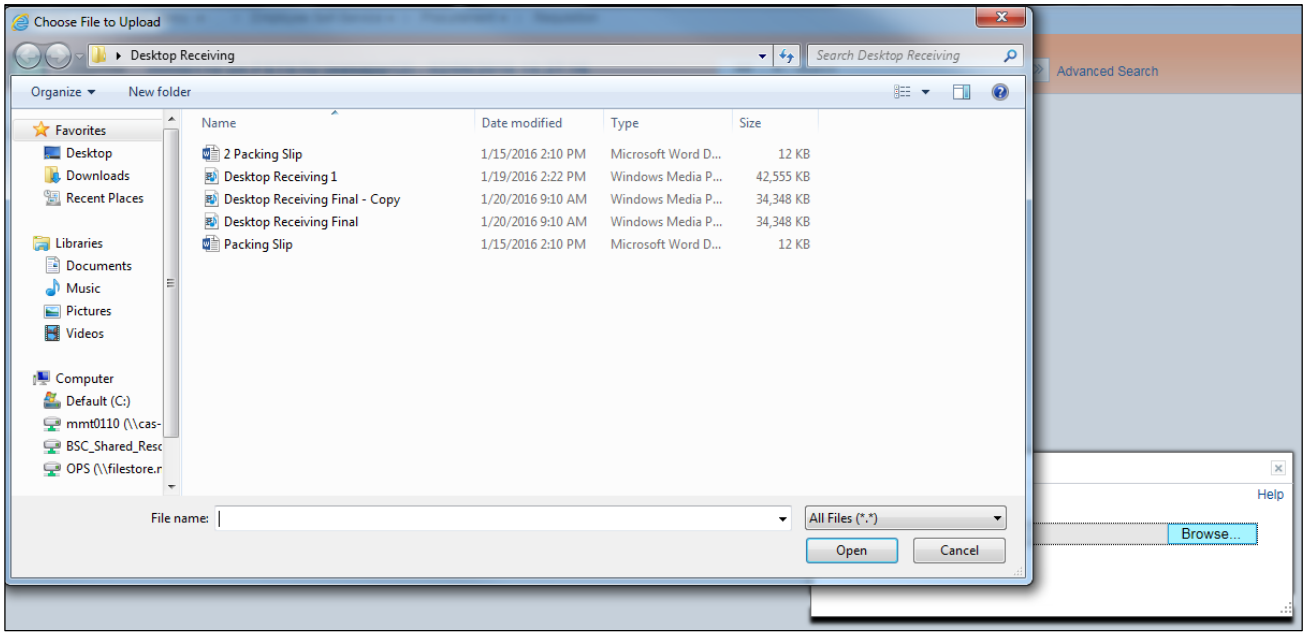
3. Enter comment in the **Comments** field within the **Line Comment** section.
   Note: Line comment is specific to the line item and is different from the **Requisition Comment** on the **Checkout – Review and Submit** screen.
4. Click **Add Attachments** to attach the required Request for Formal Solicitation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



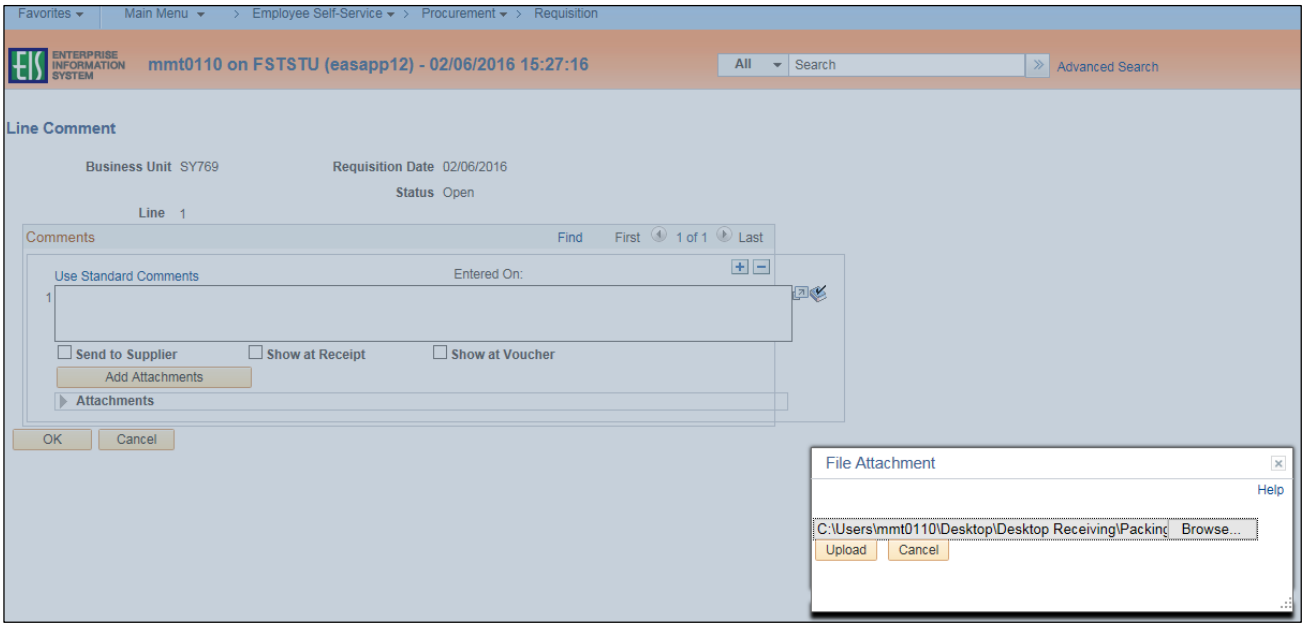
5. Click **Browse** in the **File Attachment** box.



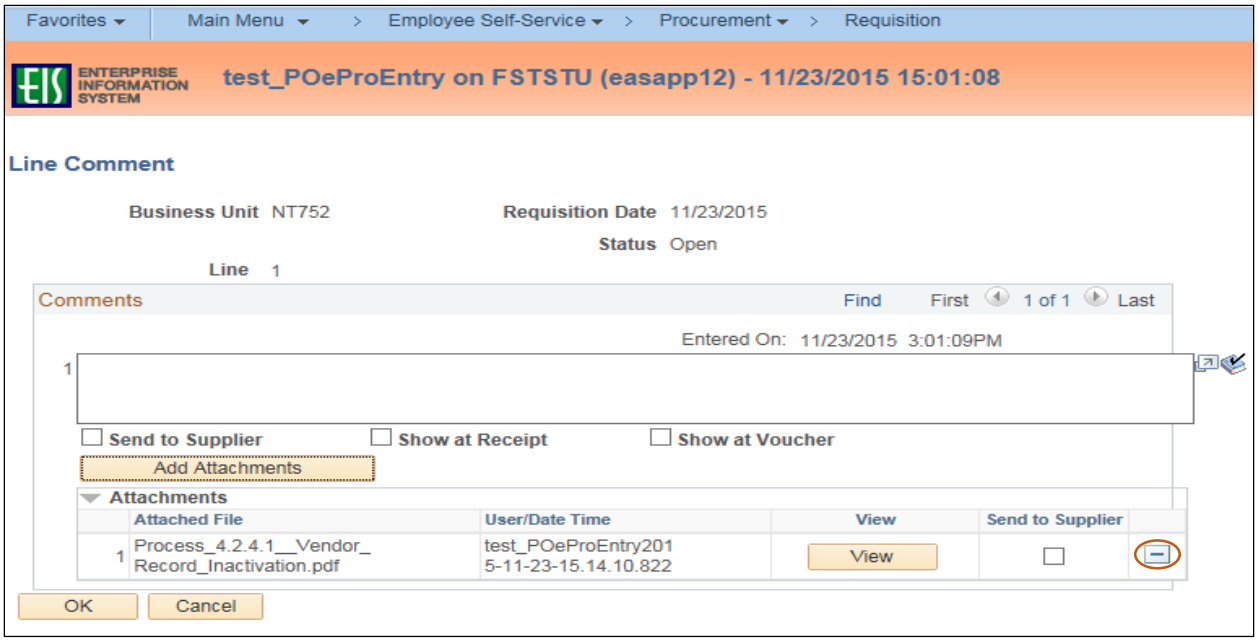
6. Select file to upload from browser window.
7. Click **Open**.



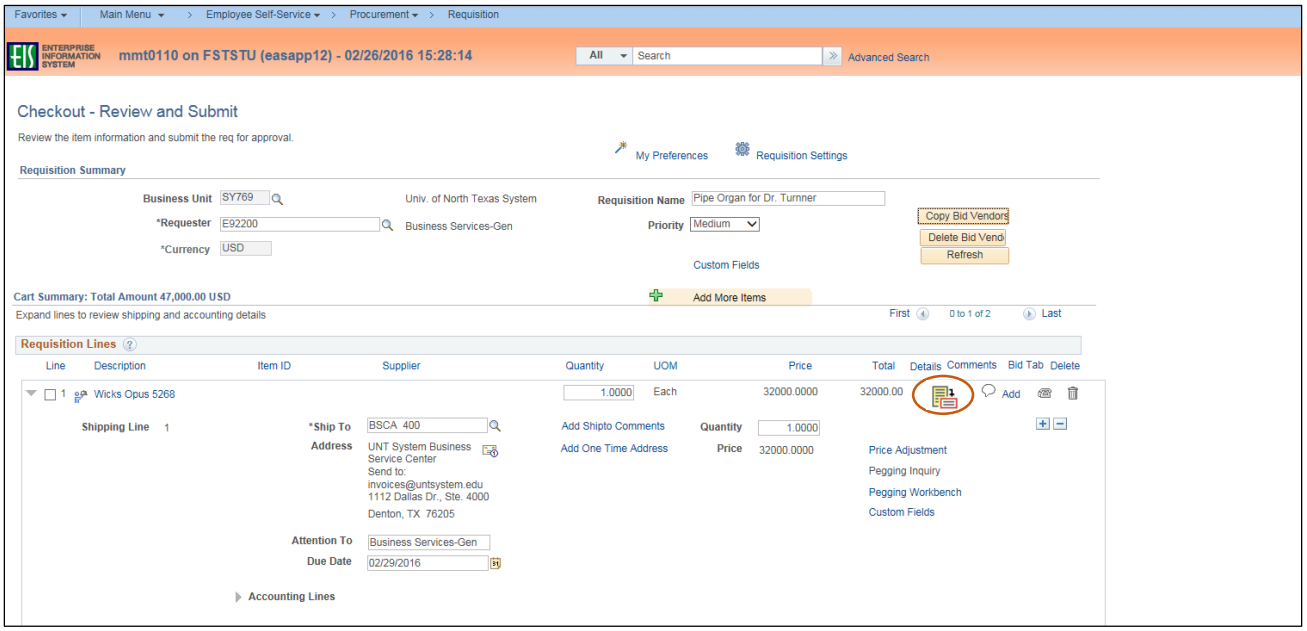
8. Click **Upload** in **File Attachment** box.



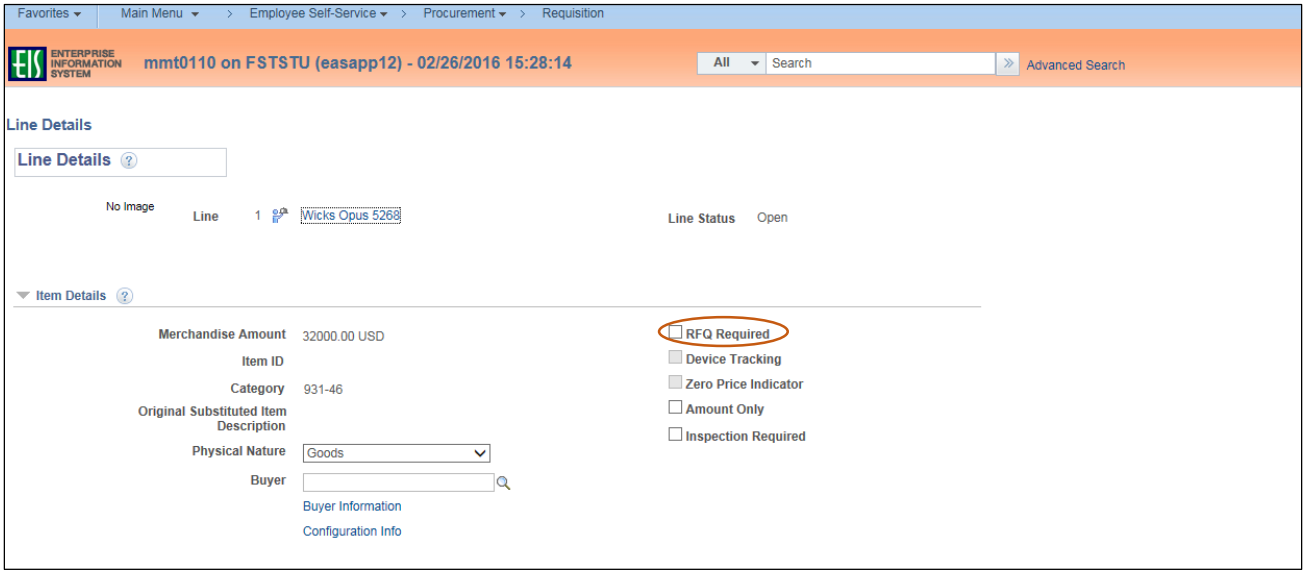
9. Confirm the file was uploaded by verifying the file is showing in the **Attachments** section.
10. Repeat steps 4-9 for each file that needs to be uploaded.
    Note: Attached files can be removed by the individual that attached them by clicking on the minus sign next to the attachment that needs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



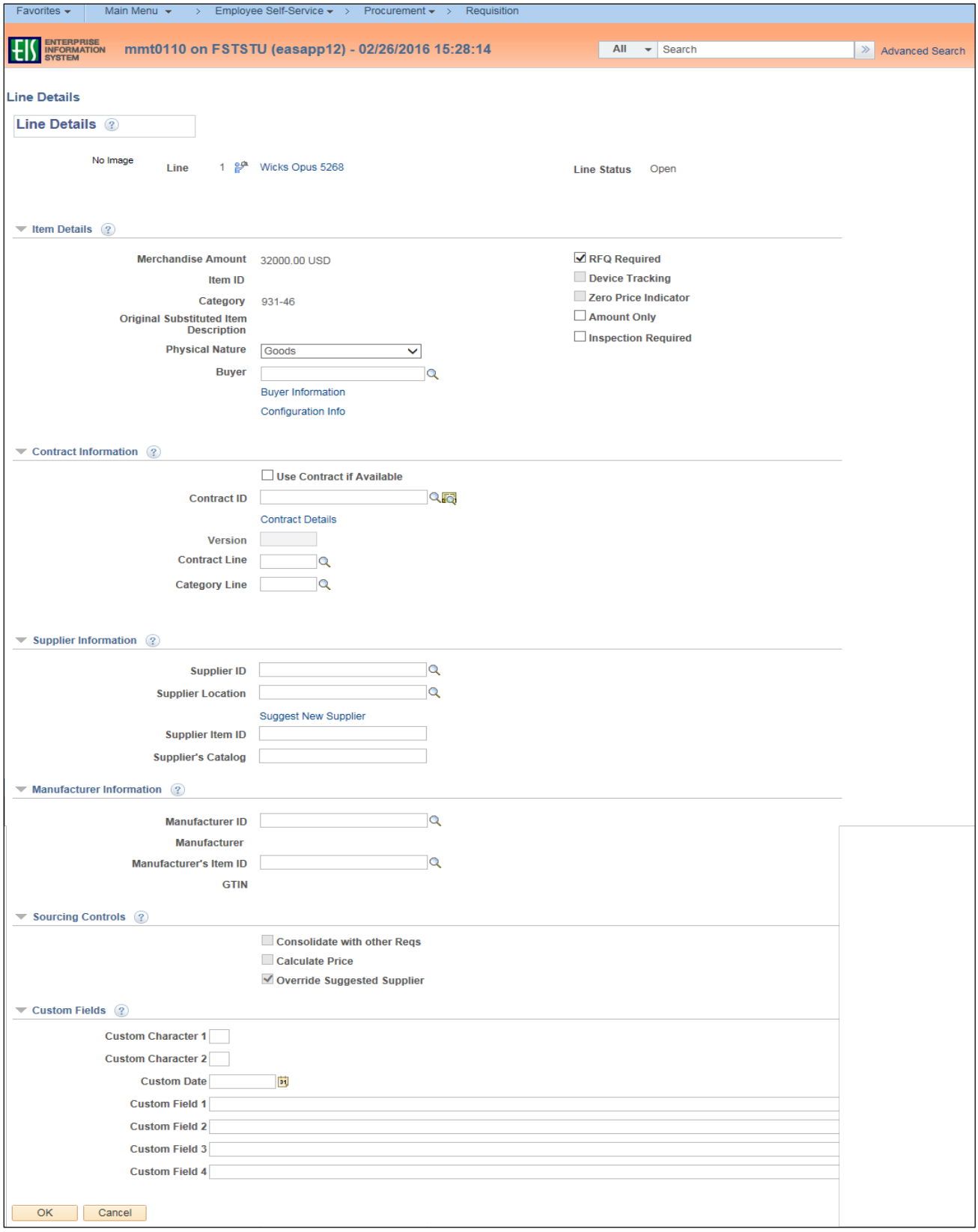
12. Click the line details icon when creating a requisition for a formal bid.



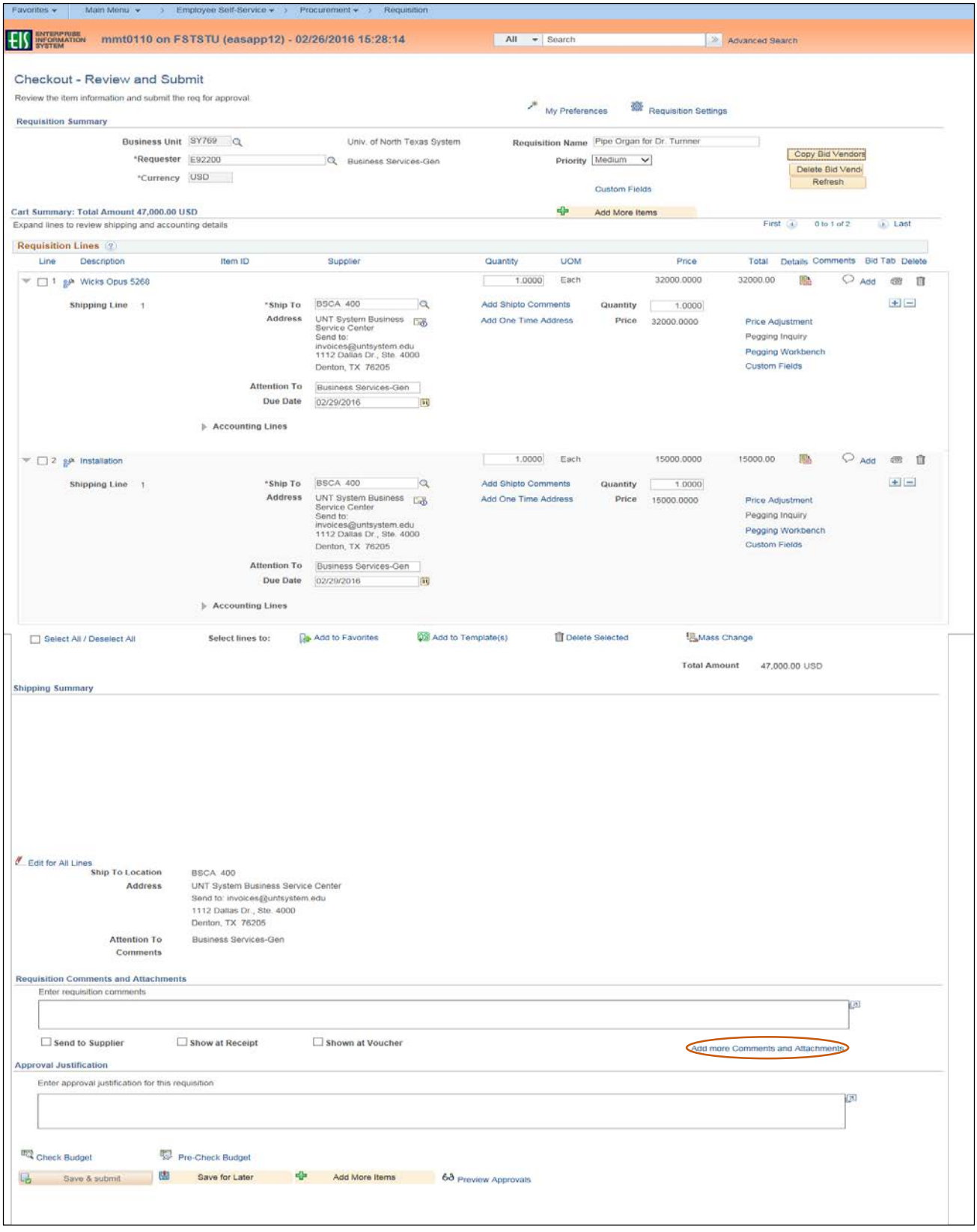
13. Select the box next to **RFQ Required** on the **Line Details** screen.



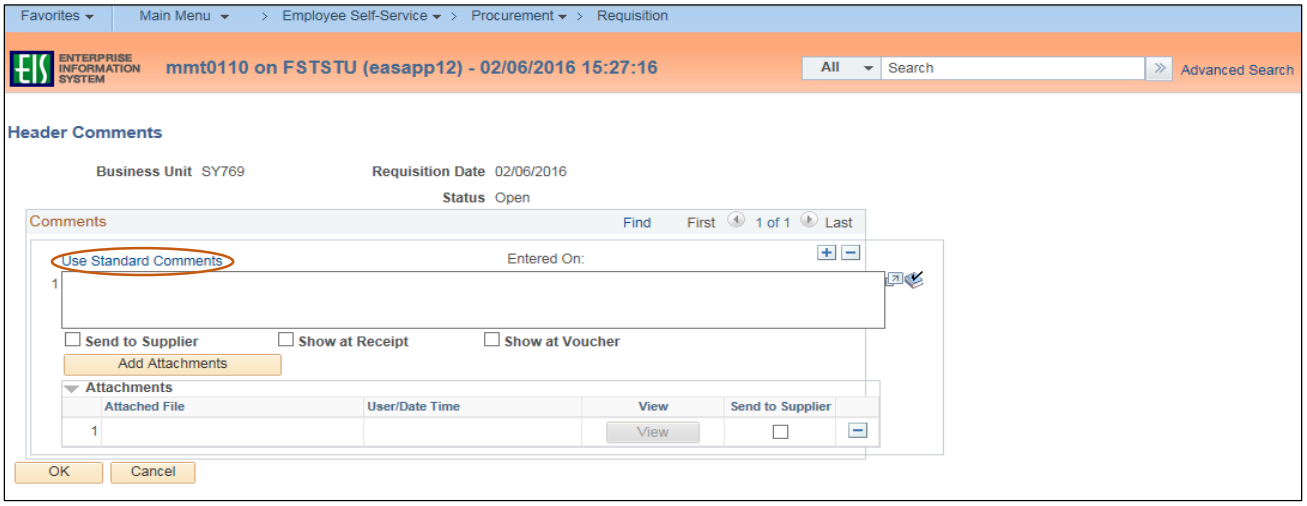
14. Click **OK** at the bottom of the screen.
15. Repeat steps 12-14 for each line item.



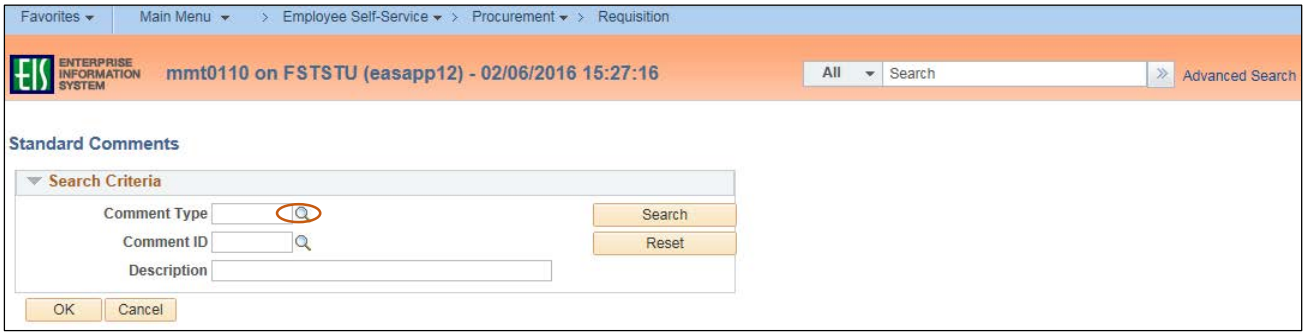
16. Scroll to the **Requisition Comments and Attachments** section at the bottom of the screen.
17. Click **Add more Comments and Attachments** to use the Standard Comments feature.



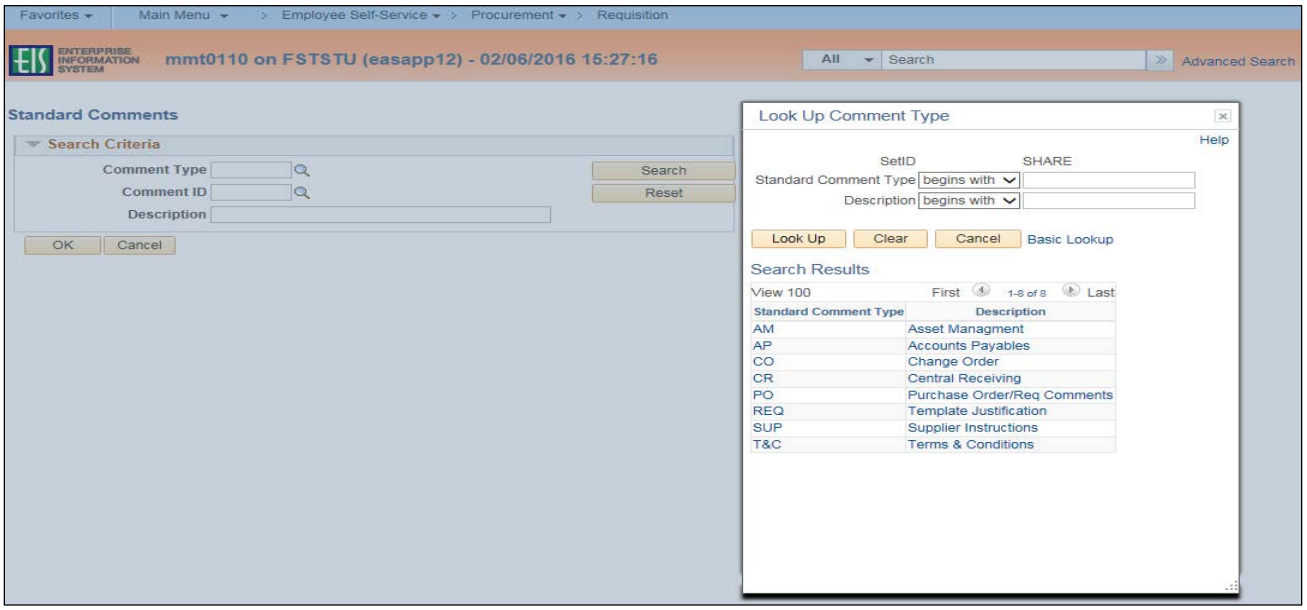
18. Click **Use Standard Comments**.



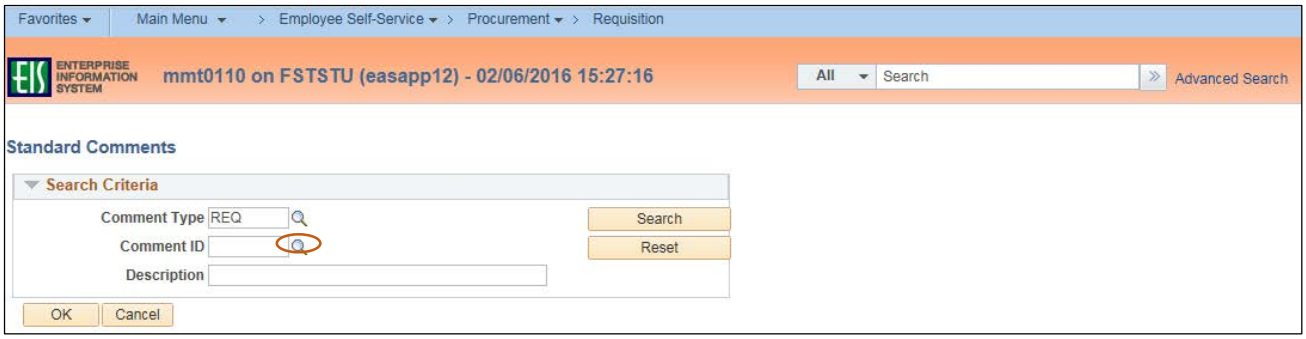
19. Click on the magnifying glass next to the **Comment Type** field.



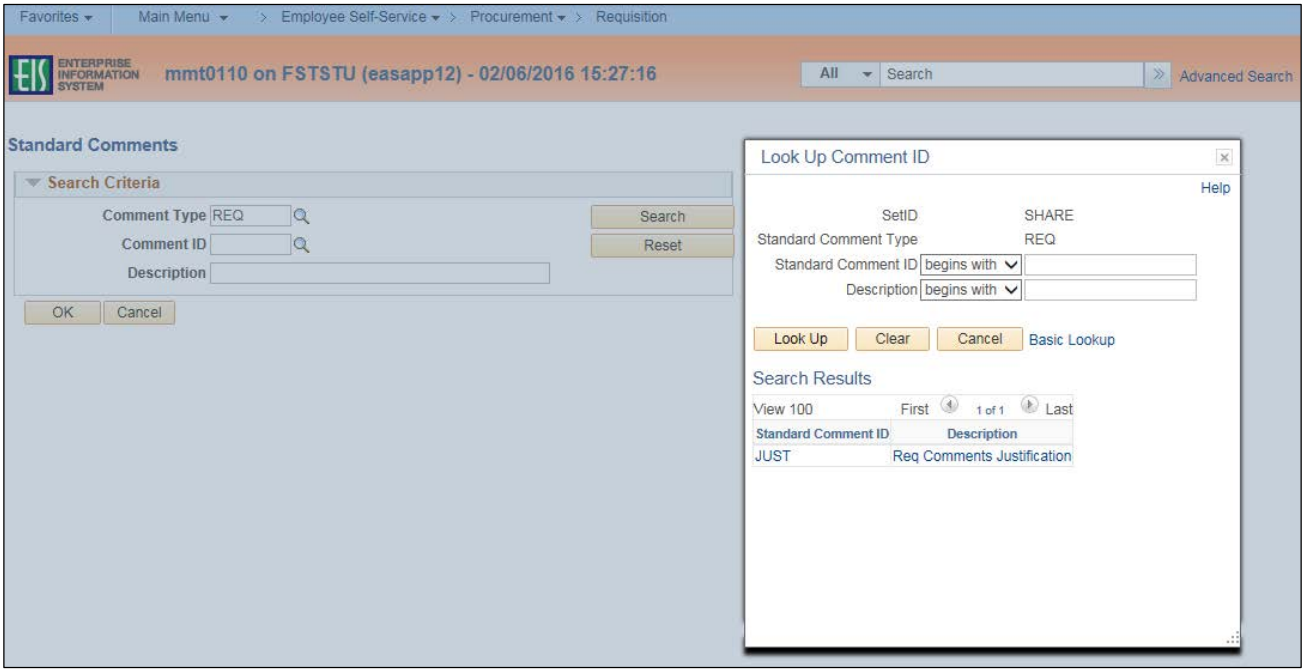
20. Select the appropriate **Standard Comment Type** from the **Look Up Comment Type** dropdown.



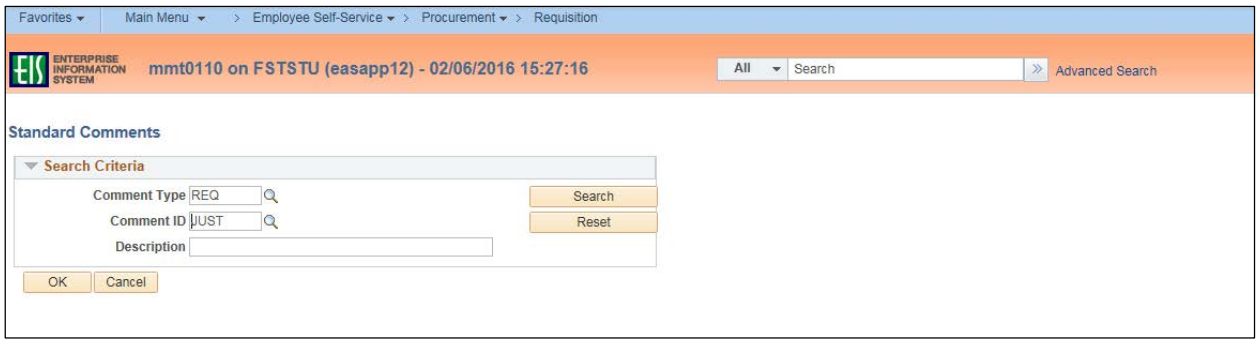
21. Click on the magnifying glass next to the **Comment ID** field.



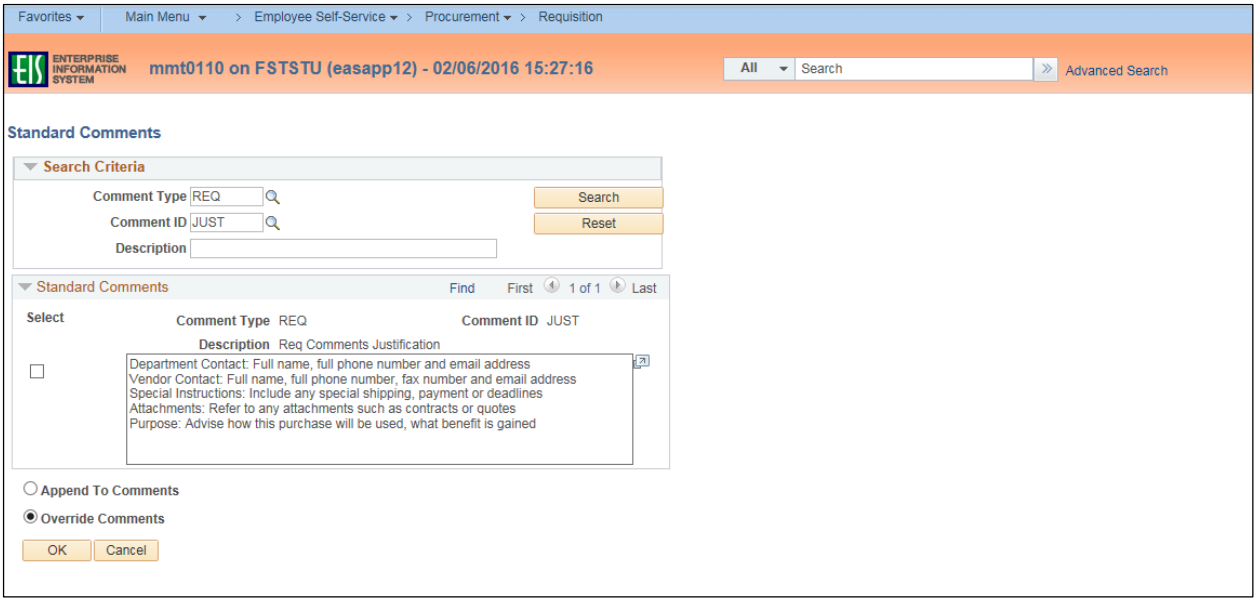
22. Select the appropriate **Standard Comment ID** from the **Look Up Comment ID** dropdown.



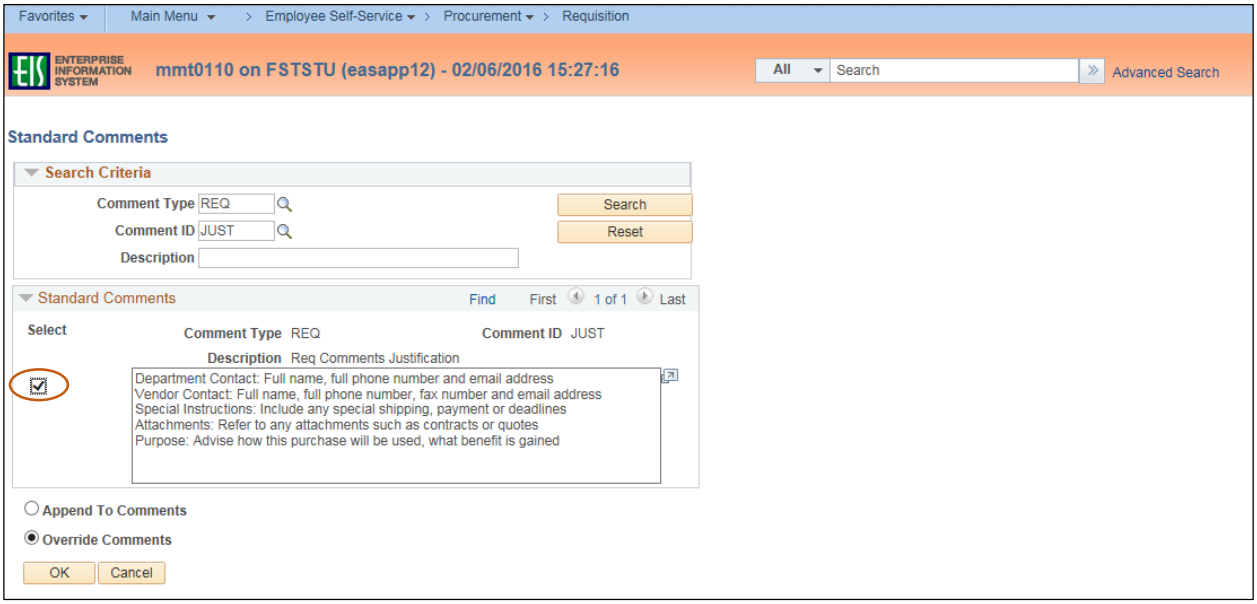
23. Click **OK**.



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



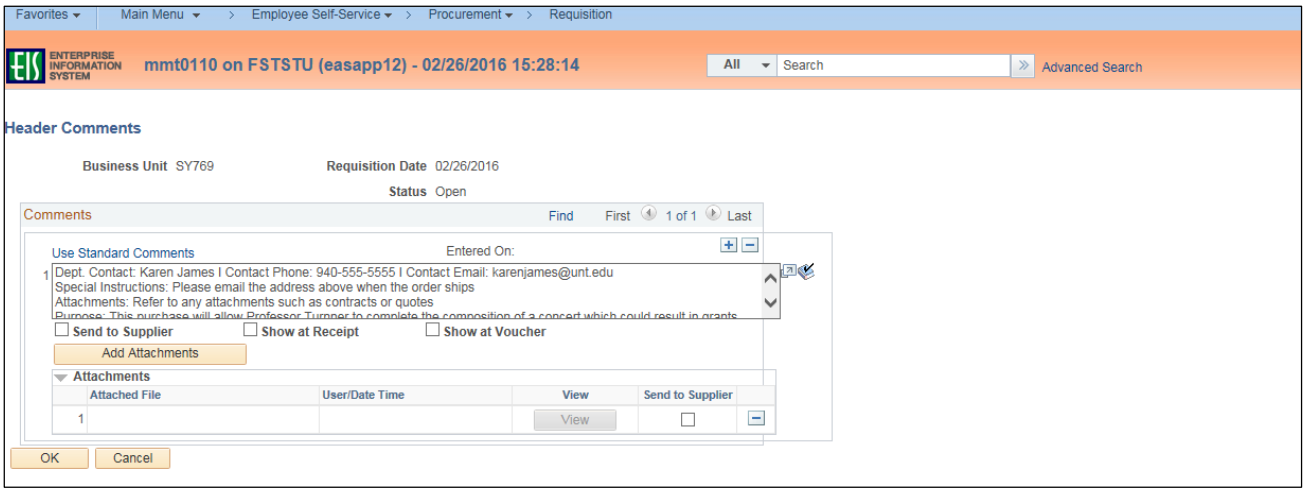
24. Click the box next to the appropriate standard comment option to make your selection.
25. Click **OK**.



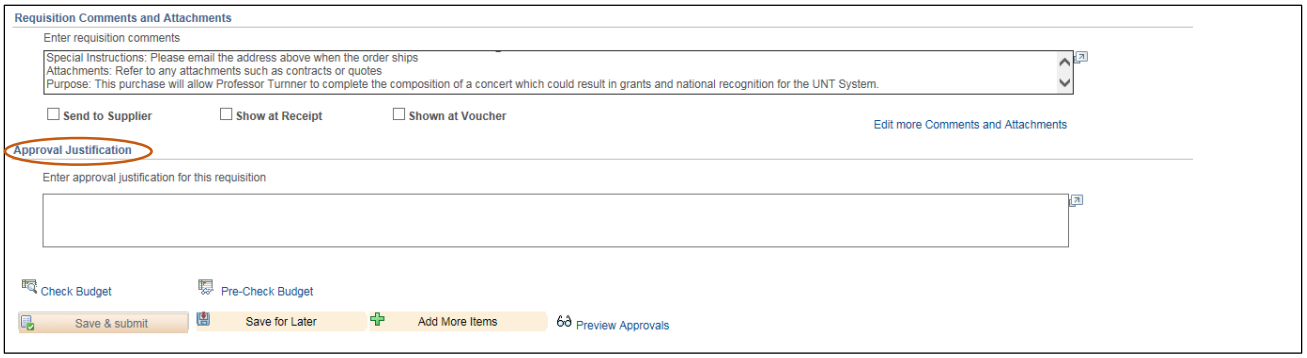
26. Recall the CAP-IT guidelines when providing detailed information in the **Standard Comments** box, which is now populated with helpful comment prompts.
Note: The items listed in the table below require additional information be provided in the **Requisition Comments and Attachments** section of the 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

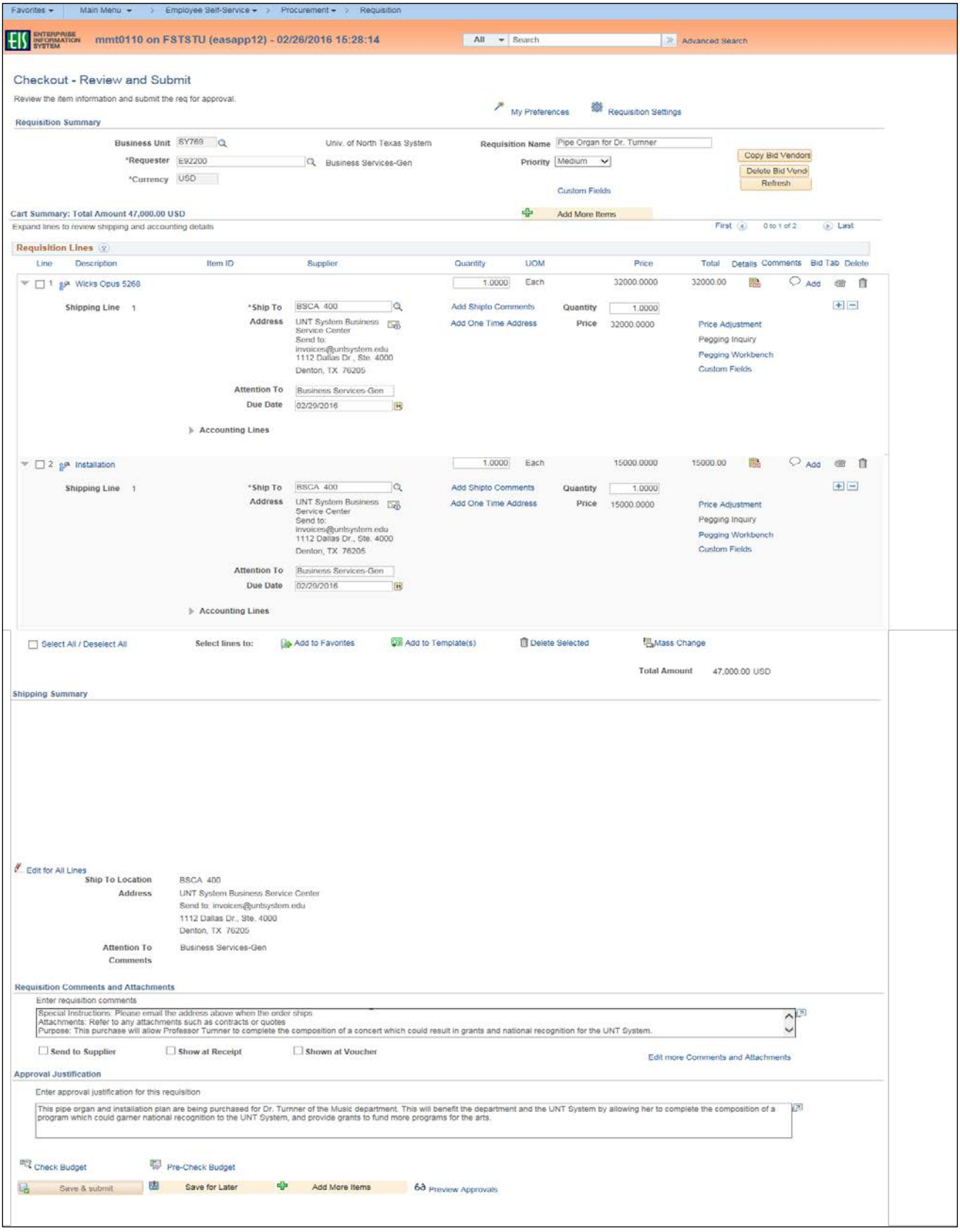
27. Click **OK**.



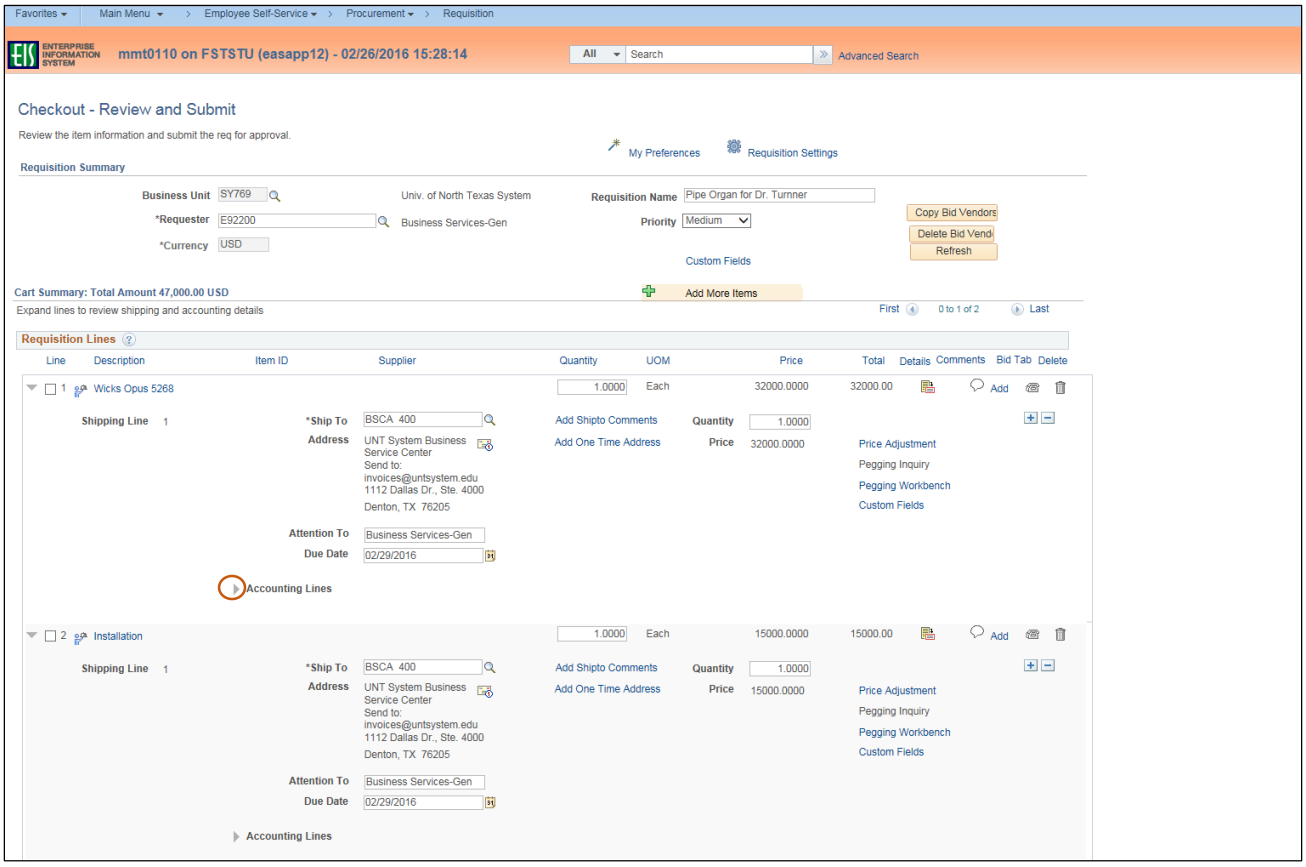
28. Scroll to the **Approval Justification** section at the bottom of the screen.
    Note: A business justification is necessary for every purchase, and should answer these questions as it pertains to the department and the purchase. The comment entered in this section should explain
    - Why this 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.



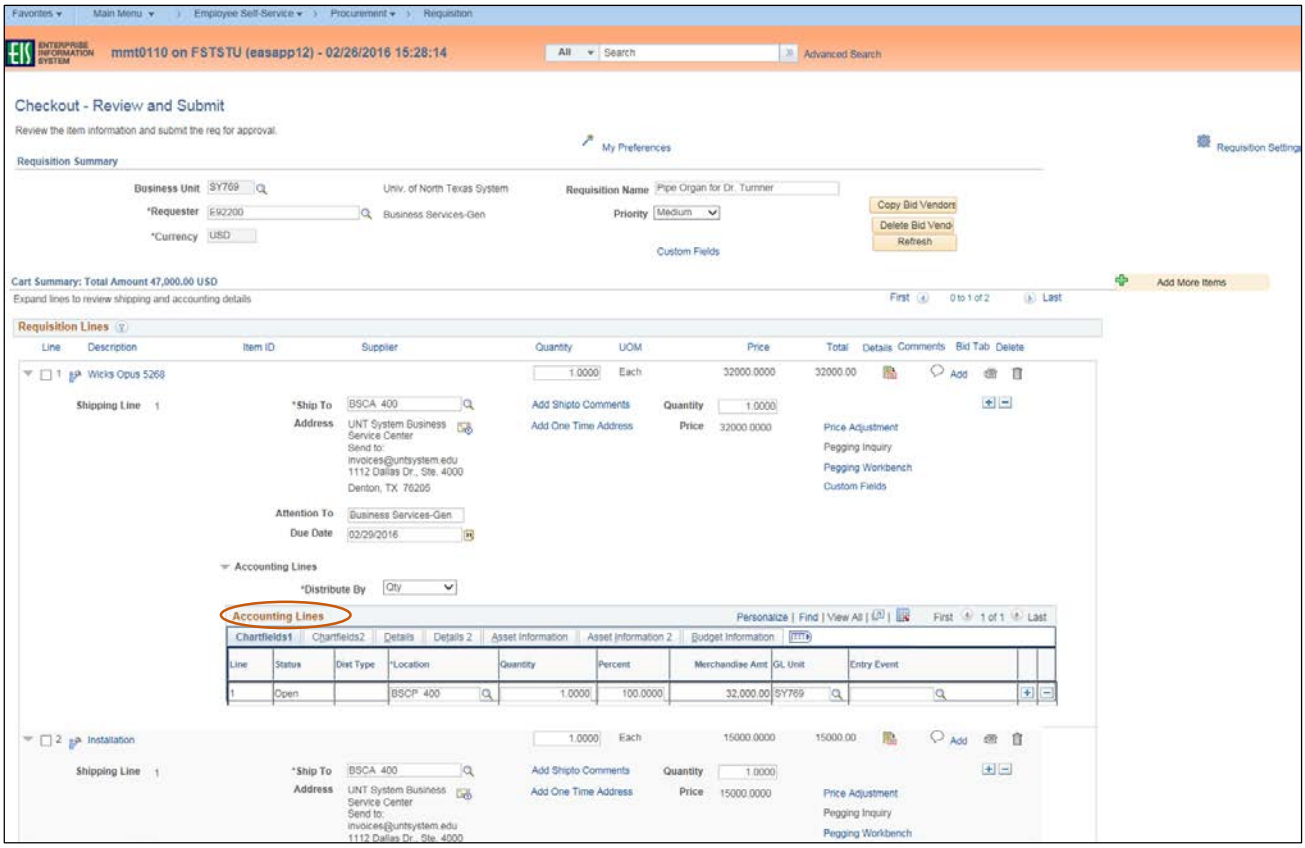
30. Click **Save for Later** at the bottom of the screen.



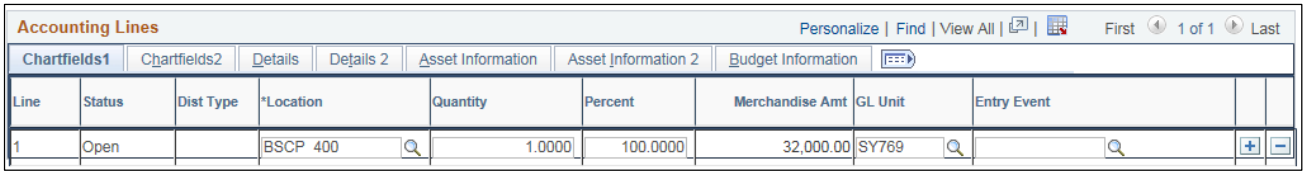
31. Click on the triangle icon next to **Accounting Lines**.



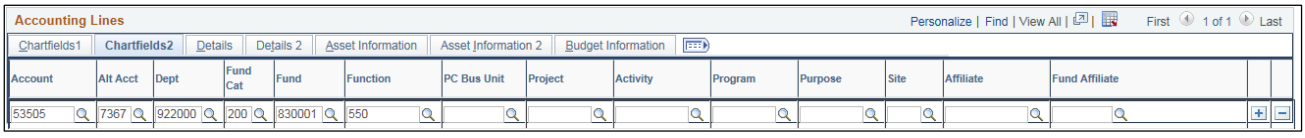
32. Review expense detail for accuracy in **Chartfields 1** and **Chartfields 2** in the **Accounting Lines** section by clicking on the appropriate tab.
33. Make changes as needed to ensure accuracy of expenditure codes.
    Note: Do not change **Account** or **Alt Acct** here. These fields are controlled 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**.



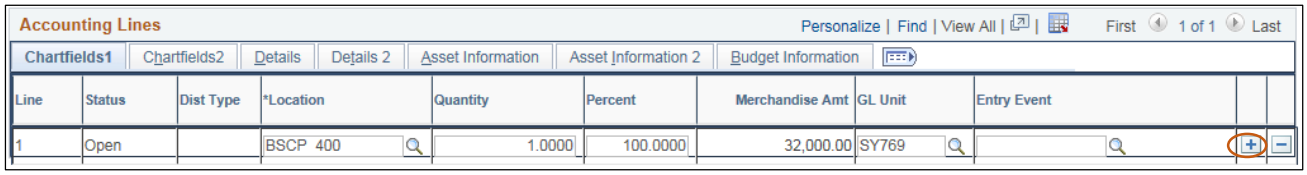
Chartfields 1



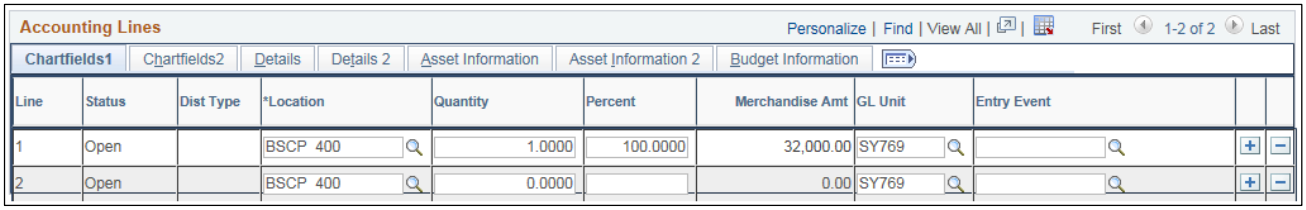
Chartfields 2



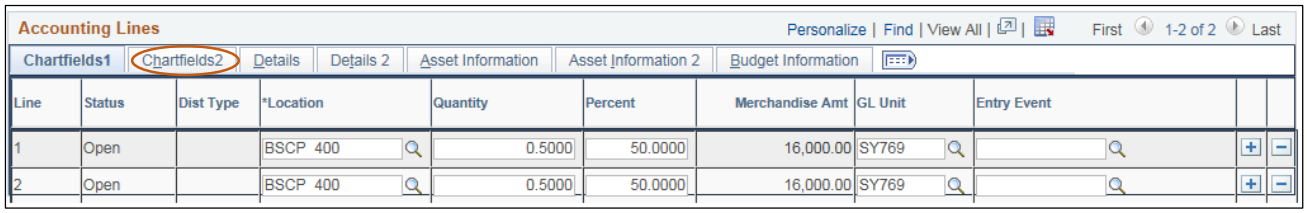
34. Follow steps 35-37 to split the expense between multiple funding sources. If you do not need to do this, skip to step 1 in the section **Reviewing Budget and Approvals and Submitting the Requisition**.
35. Click on the blue plus sign ✚ at the end of **Chartfields 1**.



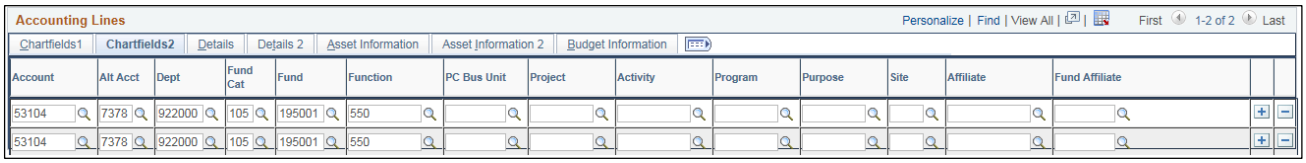
36. Distribute funding based on the quantity or percentage of the line amount.



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



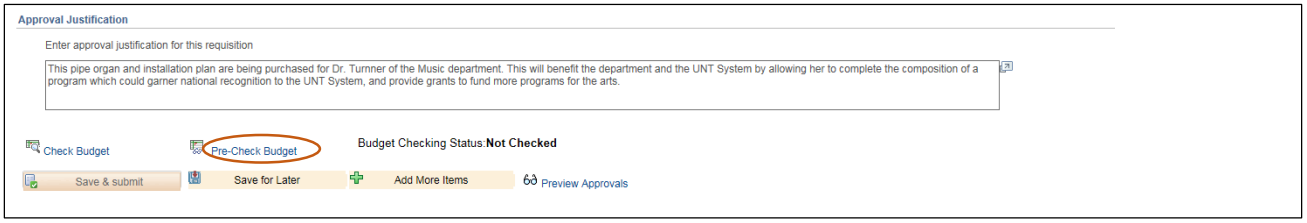
38. Make changes to the newly created distribution lines, as needed.



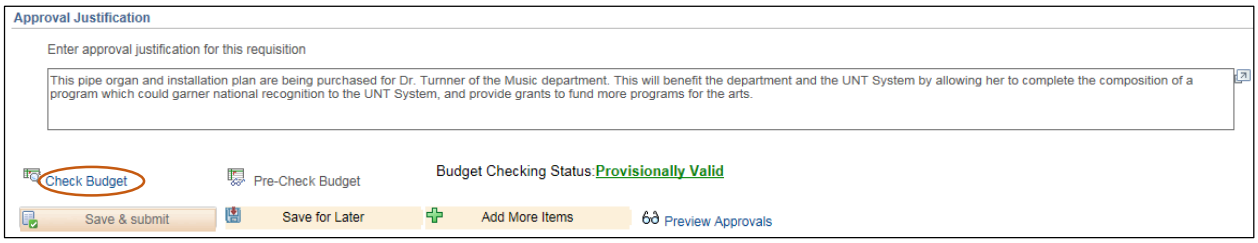
Reviewing Budget and Approvals and Submitting the Requisition

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

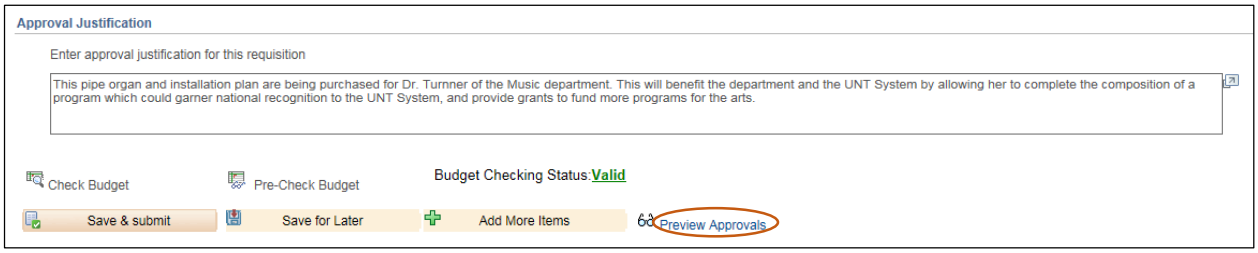
1. Click **Pre-Check Budget** at the bottom of the screen to conduct a pre-budget check, which verifies the availability of funds without encumbering the funds.
   Note: If your requisition does not pass the **Pre-Check Budget**, contact the budget office, if your requisition does pass, move on to step 2.



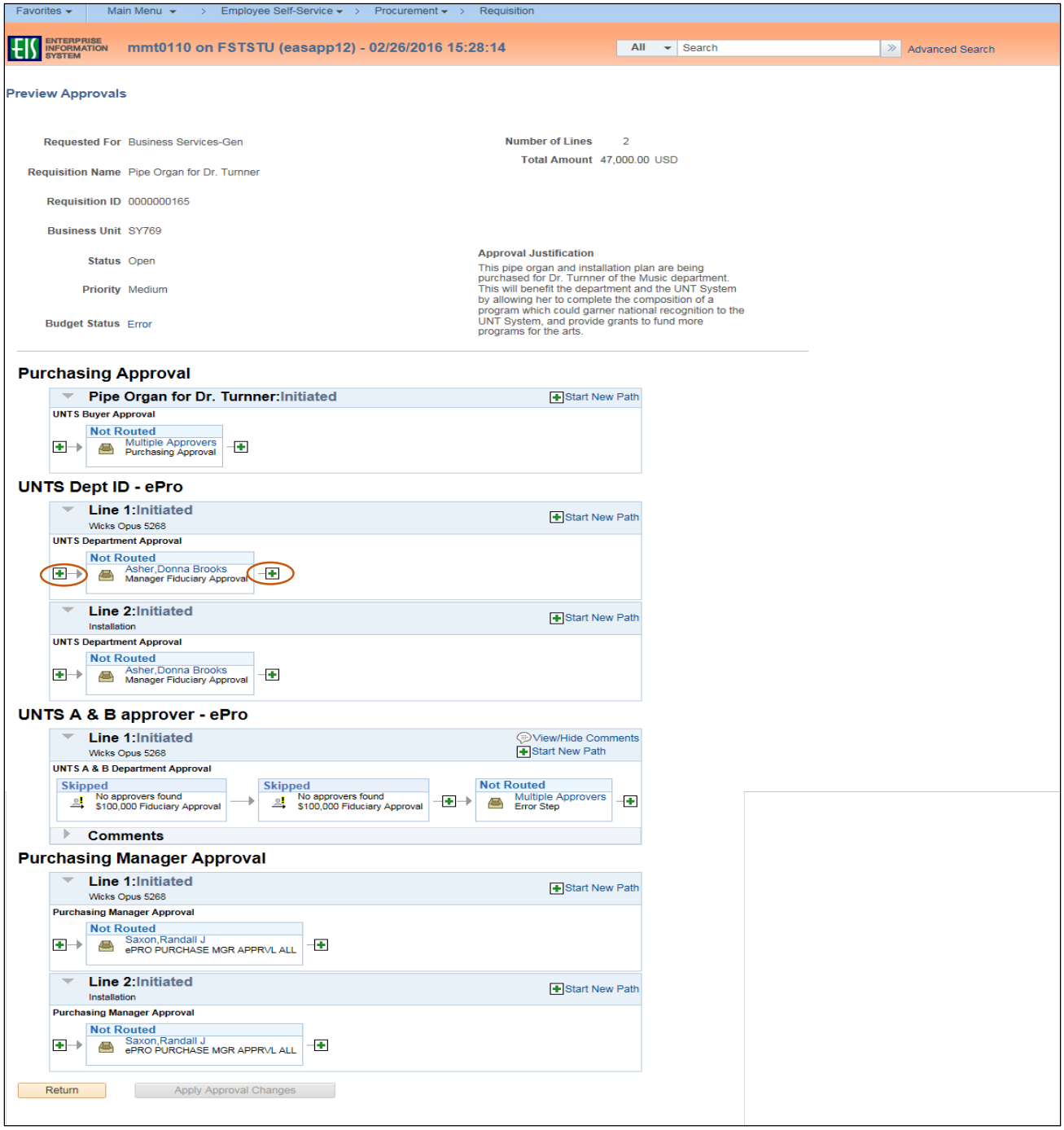
2. Click **Check Budget** to conduct an official budget check, and encumber the necessary funds.



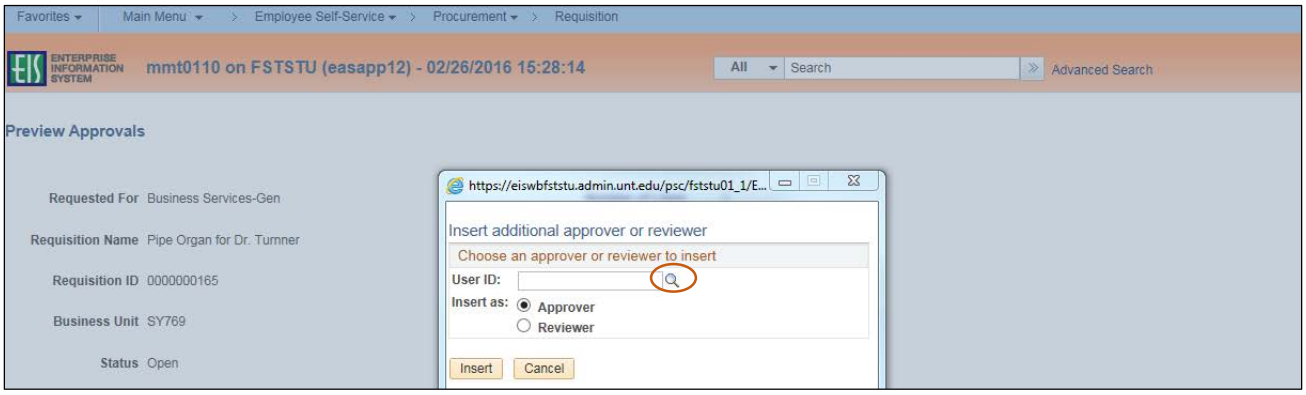
3. Click **Preview Approvals**.



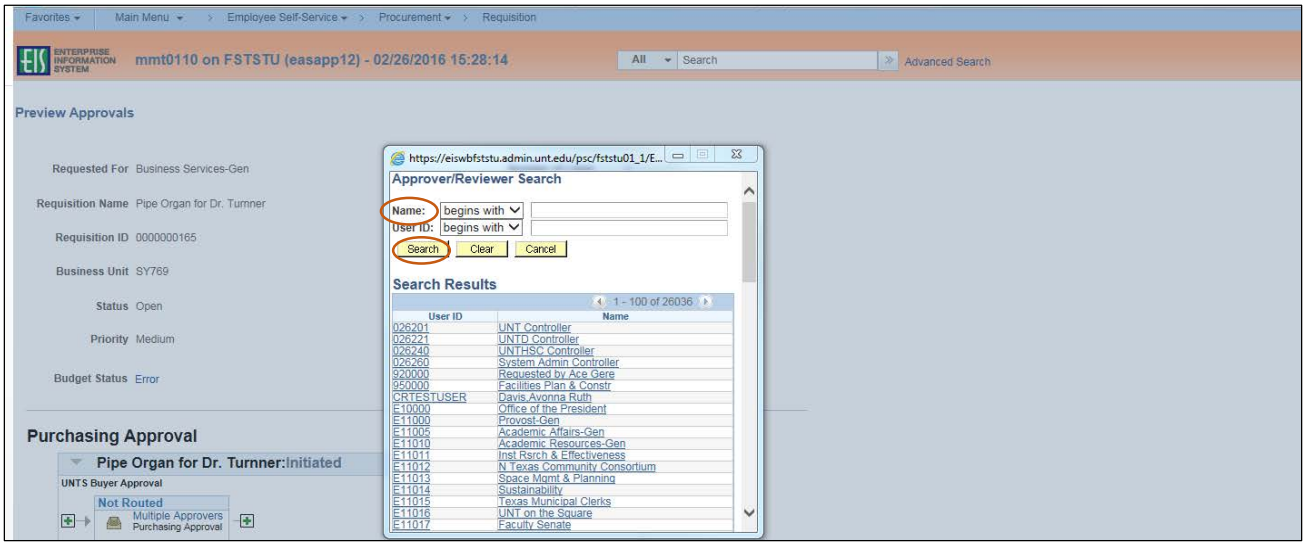
4. Review the **Preview Approvals** screen to ensure the requisition will be routed to the correct Approver for **UNTS Department Approval**.
   Note: If the requisition is set to route to the correct Approver, move on to step 13. If the requisition is not set to route to the correct Approver, move to step 5 to ad hoc to the appropriate Approver/Reviewer.
5. 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.



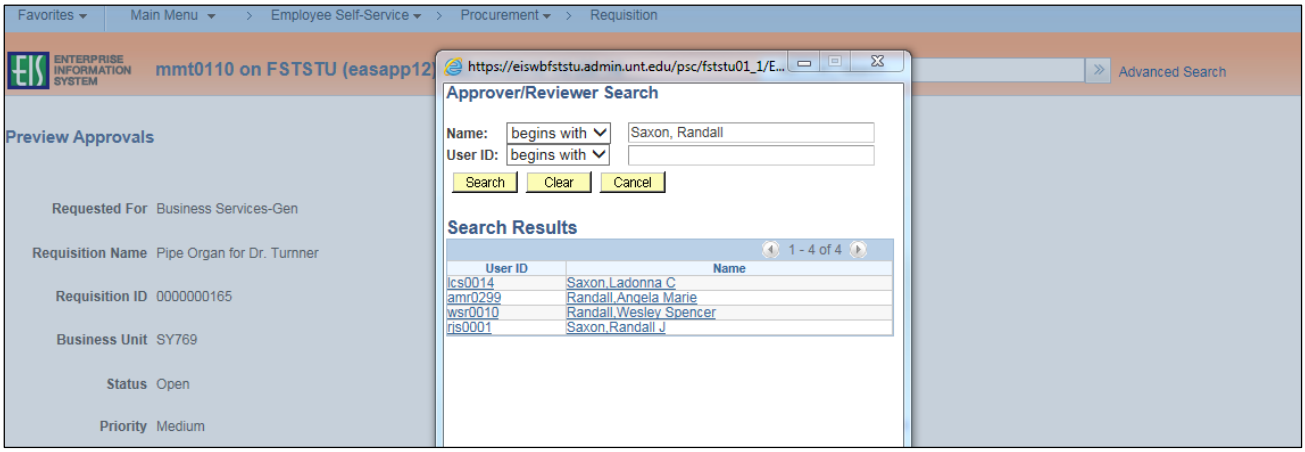
6. Click on the magnifying glass beside the blank **User ID** field.



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

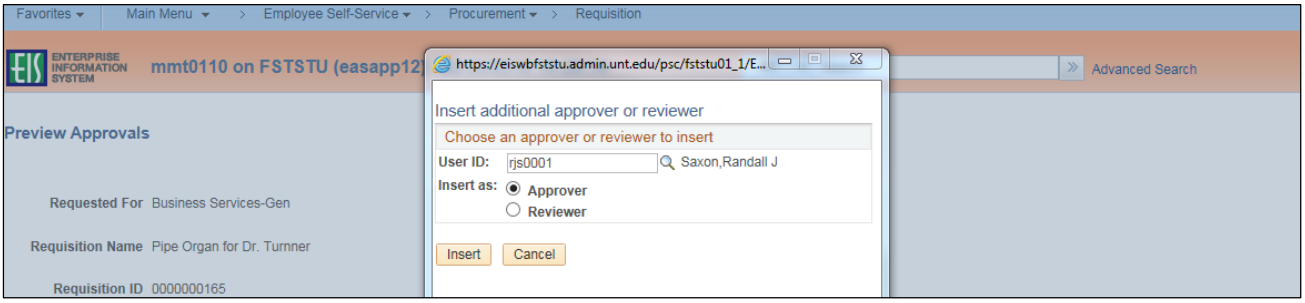


9. Select the appropriate **Name** or **User ID** for the Approver/Reviewer you want to insert.

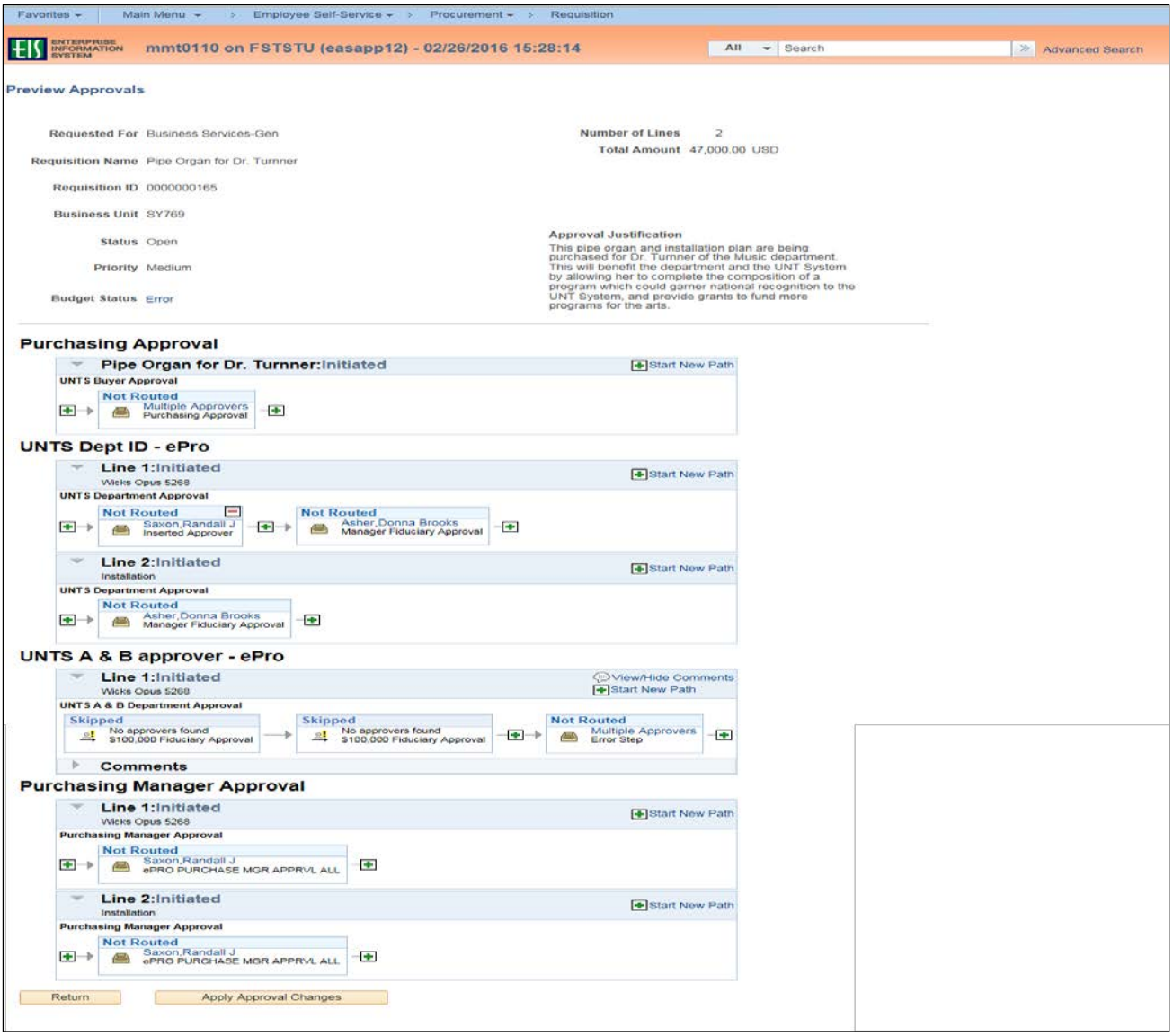


10. Click **Insert**.

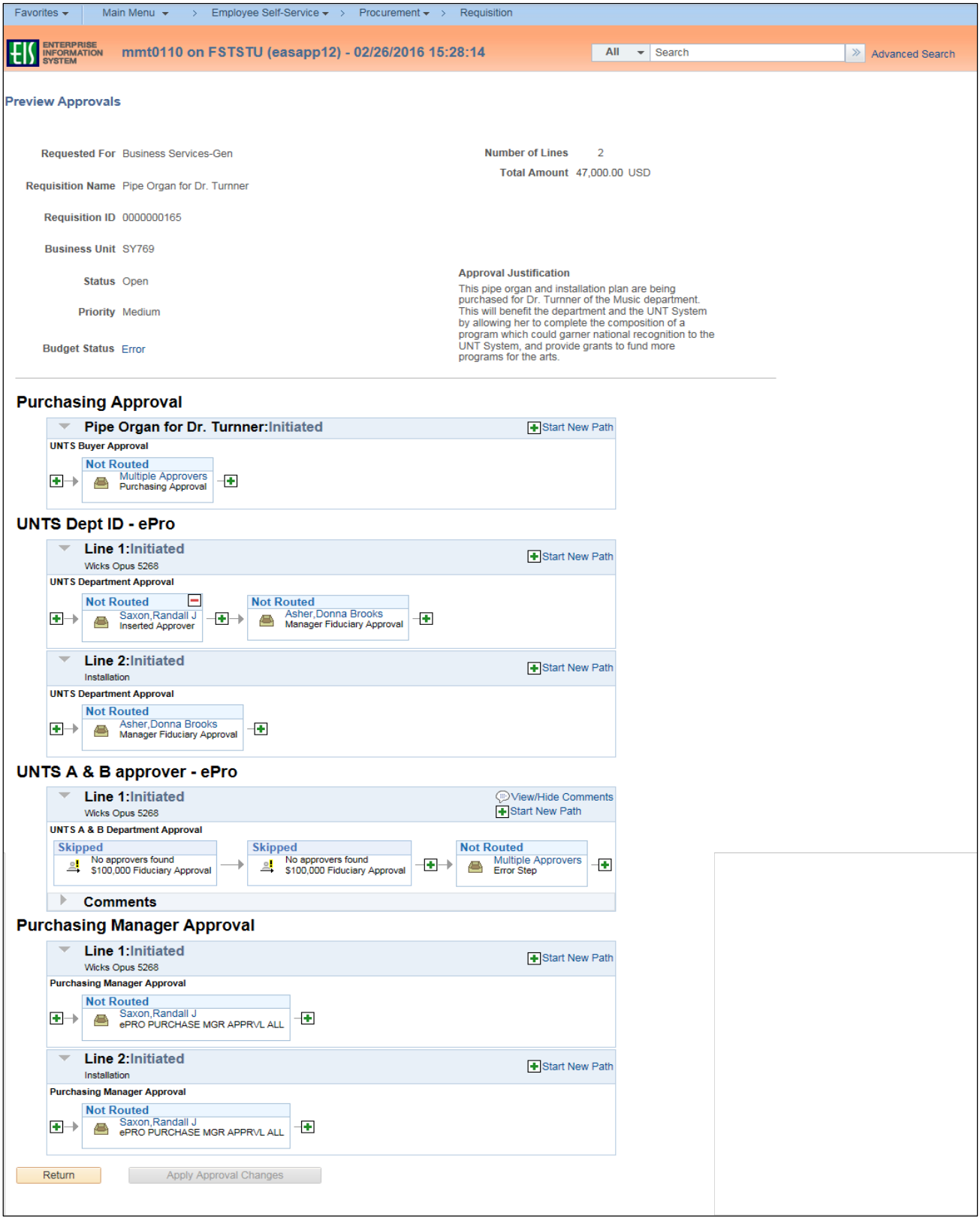
    Note: If you would like to insert someone as a Reviewer of the requisition instead of as an Approver, select the **Reviewer** option.



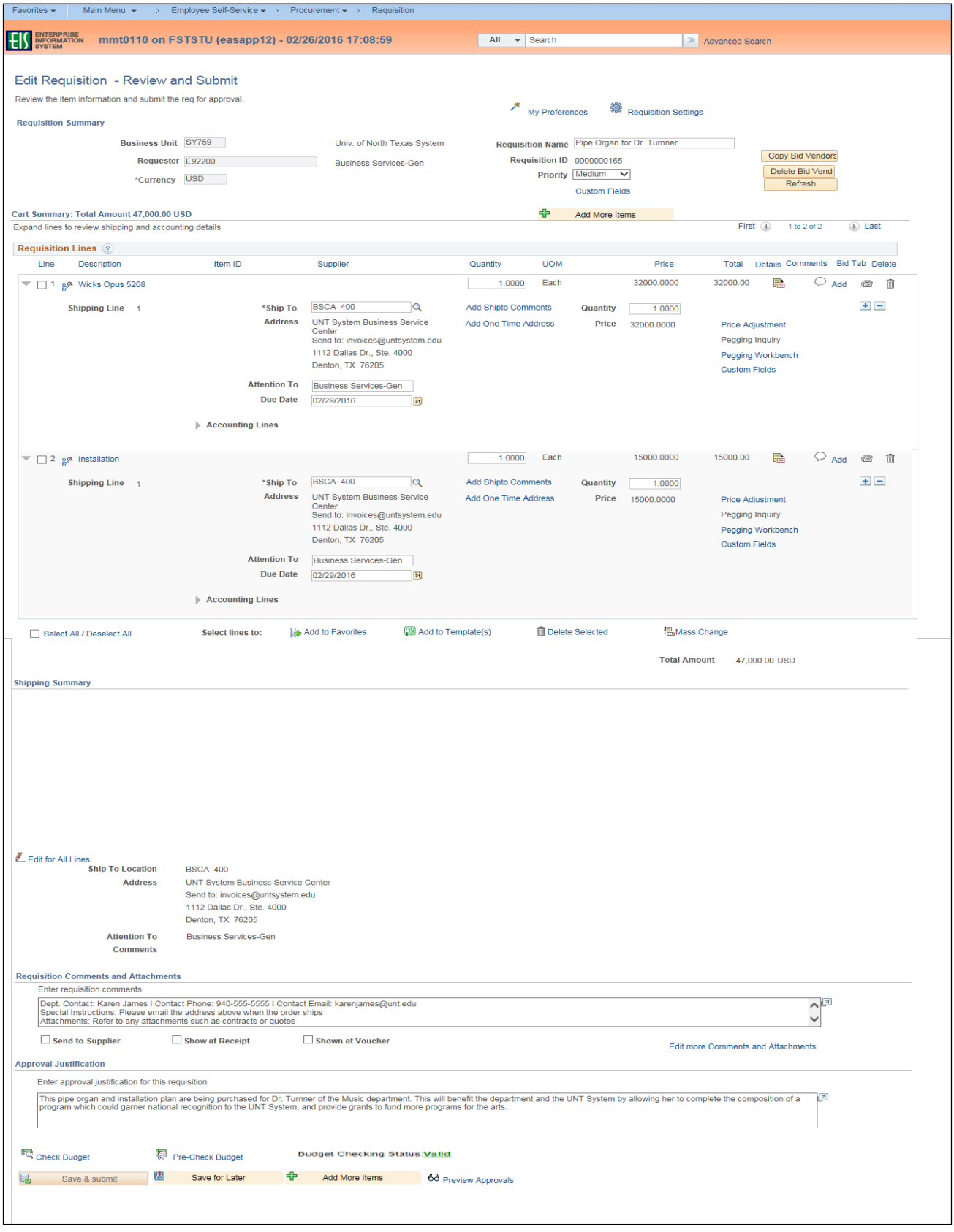
11. Click **Apply Approval Changes**.
12. Repeat steps 4-11 for each additional Approver or Reviewer you need to add.



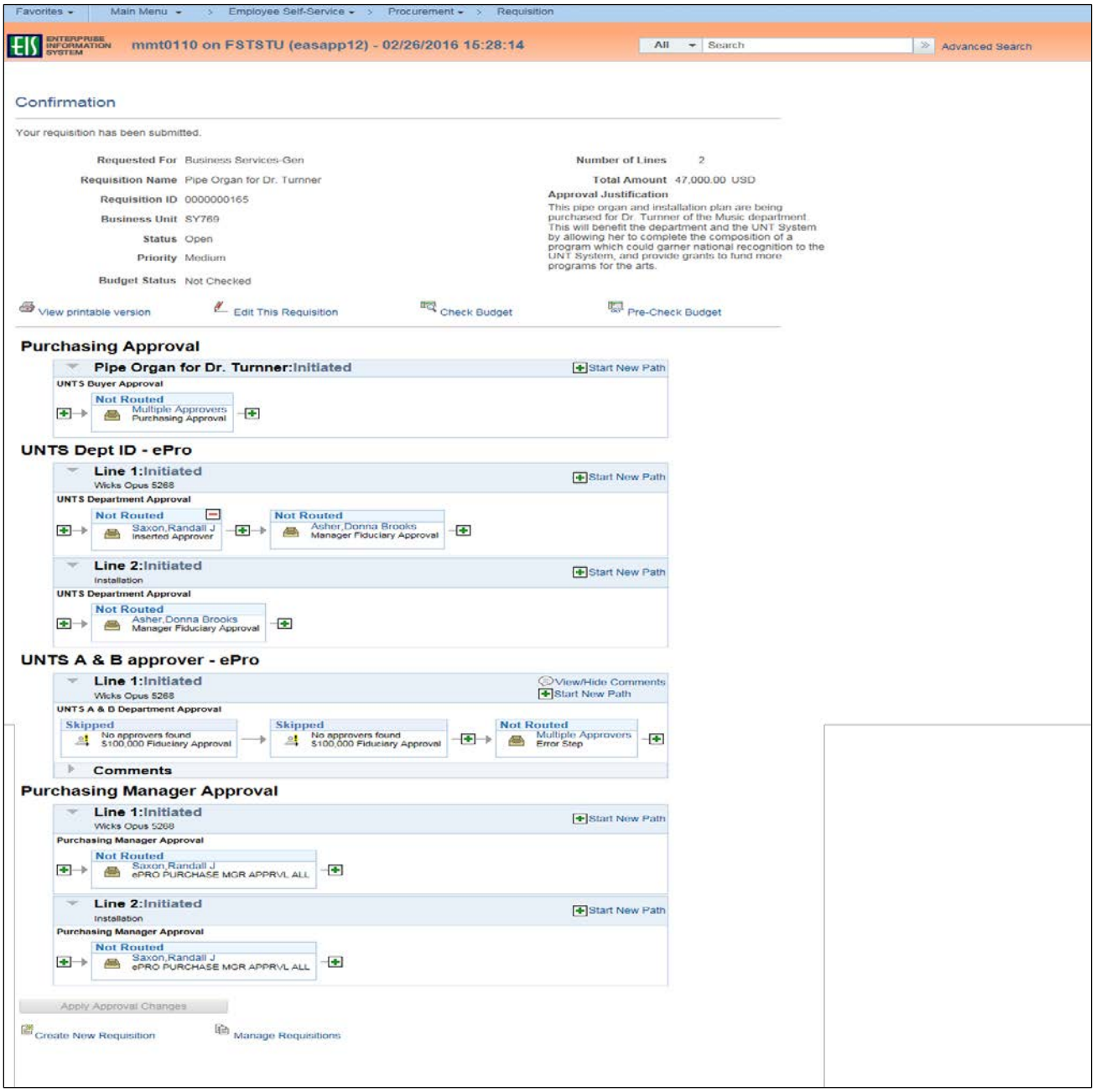
13. Click **Return**.



14. Click **Save & submit**.



Note: The **Confirmation** screen will open.



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.