

SOP #: 4.2.3.1	Area: Purchasing
Title: Purchases \$5,000.01 - \$25,000.00	Effective Date: 03-01-2016
Version #: 1.0	Revision Date: 10-01-2020
Approval Date: 02-26-2016	Review Date: N/A

## Title: Purchases \$15,000.01 - \$25,000.00

Purchase transactions from \$15,000.01 - \$25,000.00 require three informal bids or quotes, including a minimum of two from Historically Underutilized Business (HUB) vendors. For assistance finding a HUB vendor, [click here](#) or email [HUB@untsystem.edu](mailto:HUB@untsystem.edu). Orders should be awarded to the vendor that provides the best value to the institution.

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

### Setting up the Requisition


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

1. Request a minimum of three bids or quotes from vendors.

**Note:** Price quotes may be taken by phone, by fax, or by email and documentation must be kept on file. Ensure vendors send invoices to [Invoices@UNTSystem.edu](mailto:Invoices@UNTSystem.edu). Ensure a reasonable amount of time is given to vendors to respond to a request for bid or quote.

2. Enter **EUID** and **Password**.
3. Click **Sign In**.

UNIVERSITY OF NORTH TEXAS SYSTEM



## Enterprise Information System

**System Login**

EUID (required)

Password (required)

**Sign In**

**Trouble logging in?**

[Activate my account](#)

[What's my EUID?](#)

[Reset my password](#)

**Scheduled Maintenance**

Service may be interrupted during these regular maintenance times:

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

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

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

**Web Browsers & Settings**

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

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

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

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

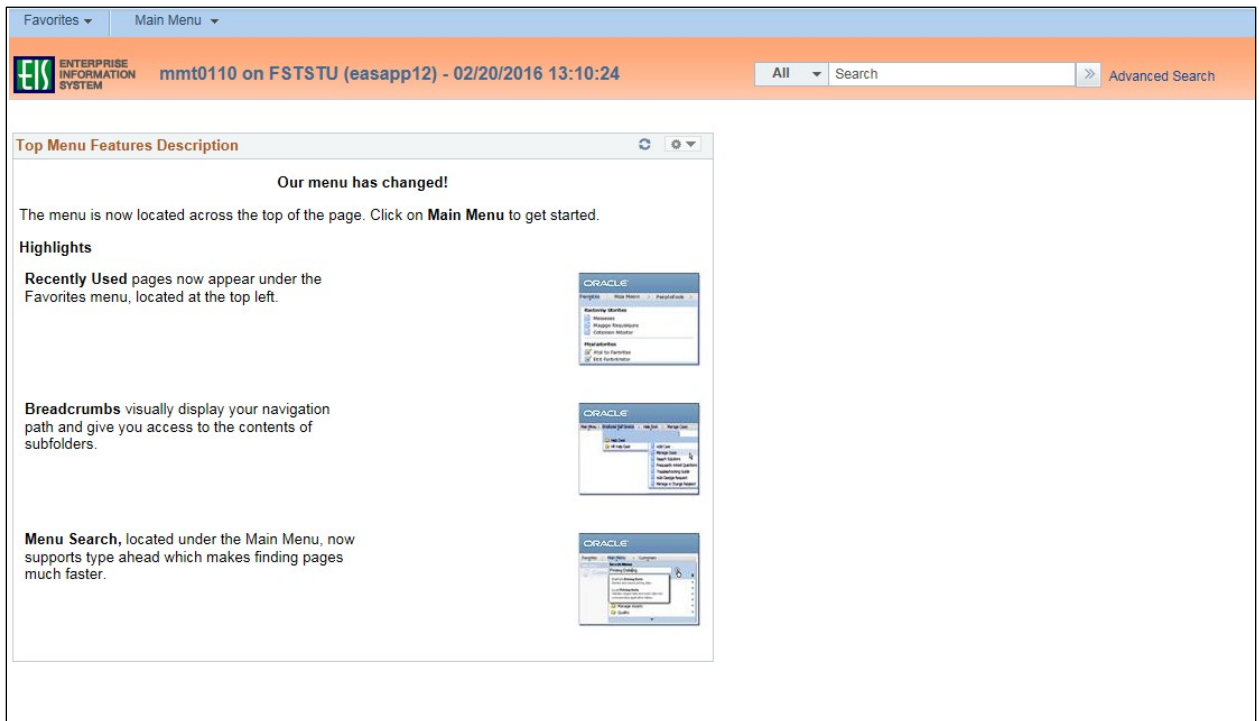
Some documents inside EIS are in PDF format and require the free [Adobe Reader](#) software to open.

[State of Texas](#) • [Statewide Search](#) • [Texas Homeland Security](#) • [Fraud Reporting](#) • [Public Information Act](#) • [Online Institutional Resumes](#)

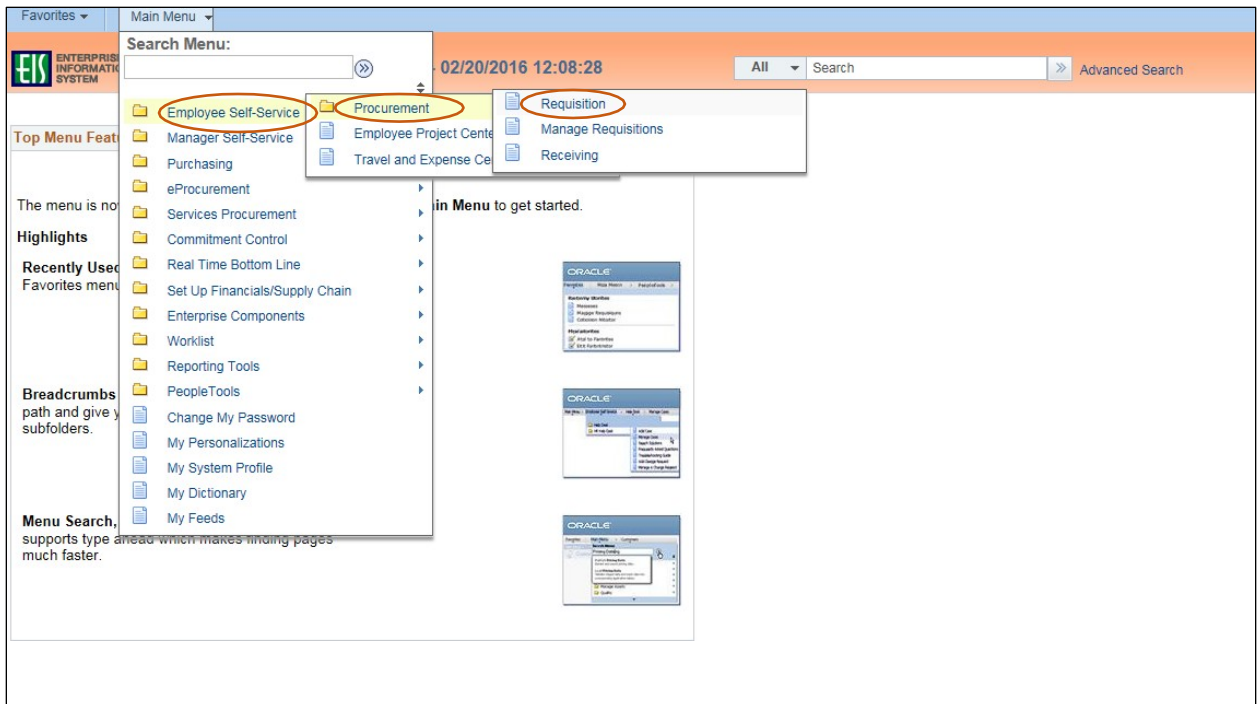
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#### 4. Click **Main Menu**.



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



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

Enterprise Information System  
mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02

Requisition Settings

Business Unit: SY769  
 \*Requester: E92200  
 \*Currency: USD

Univ. of North Texas System  
 Business Services-Gen

Requisition Name:   
 Priority: Medium

Default Options

Default  
 Override

Line Defaults

Supplier:   
 Supplier Location:   
 Buyer:   
 Category:   
 Unit of Measure:

Shipping Defaults

Ship To: BSCA 400  
 Due Date:   
 Attention:

Distribution Defaults

SpeedChart:

Accounting Defaults

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

OK Cancel

- Enter **Requisition Name**.

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

Requisition Settings





Business Unit: SY769  
 \*Requester: E92200  
 \*Currency: USD

Univ. of North Texas System  
 Business Services-Gen

Requisition Name: Piano for Dr. Paul  
 Priority: Medium

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

Line Defaults

Supplier:    
 Supplier Location:    
 Buyer:    
 Category:    
 Unit of Measure:  

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

Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country  State

Postal Code

Find  
Reset

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

OK Cancel

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

Supplier Search

Supplier ID

Name Metroplex Piano

Short Supplier Name

Alternate Supp Name

City

Country  State

Postal Code

Find  
Reset

**Search Results** Personalize | Find | View All | First 1 of 1 Last

Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
1 0000065733	Metroplex Piano Inc	000		9292 LBJ Frwy	Dallas	TX

OK Cancel

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

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

**Requisition Settings**

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

**Default Options** ?

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.  
 Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults** ?

Supplier 0000065733  Category   
 Supplier Location 000  Unit of Measure   
 Buyer

**Shipping Defaults**

Ship To BSCA 400  Add One Time Address  
 Due Date  Attention

**Distribution Defaults**

SpeedChart

**Accounting Defaults** Personalize | Find |  |  First 1 of 1 Last

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400 <input type="text"/>	SY769 <input type="text"/>	<input type="text"/>	<input type="text"/>	922000 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

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

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

**Accounting Defaults** Personalize | Find |  |  First 1 of 1 Last

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400 <input type="text"/>	SY769 <input type="text"/>	<input type="text"/>	<input type="text"/>	922000 <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

The screenshot shows the 'Look Up Fund Cat' dialog box. The search criteria are SetID: SHARE and Fund Category: begins with. The search results table is as follows:

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

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

The screenshot shows a close-up of the 'Accounting Defaults' table. The table has columns: 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.

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

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

Look Up Fund

SetID: SHARE

Fund: begins with

Description: begins with

Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

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-Prsint's Cmrstn
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 1999
100023	DepOp/QEnd-Rev Fin Sys Ser 05
100024	DepOp/QEnd-Employee Ben Prg
100025	DepOp/QEnd-Unt Hlth 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 Lot
130007	Schol/QEnd-Pres Council
130008	Schol/QEnd-L Murchison Upgrad
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-Banfi Vintner
130020	Schol/QEnd-Auxiliary Services
130021	Schol/QEnd-L Murchison Grad
130022	Schol/QEnd-TCOM Minority
130023	Schol/QEnd-Grainner

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

Accounting Defaults

Personalize | Find | First 1 of 1 Last

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

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

The screenshot shows the 'Requisition Settings' screen in the EIS system. The 'Look Up Function' dropdown is open, displaying a list of functions. The 'Function' field in the dropdown is set to 'begins with'. The search results list includes functions such as 'Instruction-General', 'Instruction-Sponsored', 'Practice Direct', 'Research-Sponsored', and 'Public Service'.

**Requisition Settings**

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

**Default Options**

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.  
 Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults**

Supplier: 0000065733 Category:   
 Supplier Location: 000 Unit of Measure:   
 Buyer:

**Shipping Defaults**

Ship To: BSCA 400 Add One Time Address  
 Due Date: Attention:

**Distribution Defaults**

SpeedChart:

**Accounting Defaults**

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

OK Cancel

18. Click **OK**.

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

The screenshot shows the 'Requisition Settings' screen after clicking OK. The 'Requisition Name' field is now populated with 'Piano for Dr. Paul'. The 'Priority' dropdown is set to 'Medium'. The 'Accounting Defaults' table is updated with the selected function '200'.

**Requisition Settings**

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

**Default Options**

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.  
 Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults**

Supplier: 0000065733 Category:   
 Supplier Location: 000 Unit of Measure:   
 Buyer:

**Shipping Defaults**

Ship To: BSCA 400 Add One Time Address  
 Due Date: Attention:

**Distribution Defaults**

SpeedChart:

**Accounting Defaults**

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

OK Cancel



## 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.

**C**ode using category code best describing the purchase.

**A**ttach all documents.

**P**urpose statement should define how purchase will benefit the institution.

**I**nformation in the Justification Comments must include:

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

**T**rack order using **Manage Requisitions**.

## Creating the Requisition

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

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

The screenshot shows the 'Create Requisition' page in the EIS system. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The page title is 'Create Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page features a search bar and a 'Request Options' dropdown. The 'ePro Services' section is highlighted, and the 'New Requisition' link is circled in red. Other sections include 'Web', 'Forms', 'Favorites', 'Recently Ordered', and 'External Catalogs'.

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

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

The screenshot shows the 'New Requisition' form in the EIS system. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The page title is 'Create Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page features a search bar and a 'Request Options' dropdown. The 'New Requisition' form is displayed, with the 'Goods/Service Description' field highlighted with a red box. Other fields include 'Quantity', 'Amount', 'Category', 'Supplier ID', 'Supplier Name', 'Quote Number', 'Beginning Date', 'Unit of Measure', 'Currency Code', '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.

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

The screenshot shows the 'New Requisition' form in the EIS system. The 'Quantity' field is highlighted with a red circle. The form includes fields for \*Goods/Service Description (Petrof Baby Grand Piano), \*Unit of Measure, \*Currency Code (USD), \*Category, Supplier ID (0000065733), Supplier Name (Metroplex Piano Inc), Quote Number, Beginning Date, 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 'New Requisition' form with the 'Quantity' field filled with '1'. The magnifying glass icon next to the 'Unit of Measure' field is highlighted with a red circle. The form includes fields for \*Goods/Service Description (Petrof Baby Grand Piano), \*Unit of Measure, \*Currency Code (USD), \*Category, Supplier ID (0000065733), Supplier Name (Metroplex Piano Inc), Quote Number, Beginning Date, Quote Date, and Date of Completion. There are also checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', and an 'Add to Cart' button.

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

The screenshot shows the 'Look Up Unit of Measure' dialog box. The search bar contains 'begins with'. The search results are displayed in a table with the following columns: Unit of Measure, Description, and Short Description. The results include:

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

The screenshot shows the 'New Requisition' form. The 'Amount' field is highlighted with a red circle. The form contains the following fields:

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

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

The screenshot shows the 'Create Requisition' page in the EIS system. The page title is 'Create Requisition' and the user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page is divided into a header, a navigation bar, and a main content area. The main content area is titled 'New Requisition' and contains a form with the following fields:

- \*Goods/Service Description: Petrof Baby Grand Piano
- Quantity: 1
- Amount: 19,500.00
- \*Category: (magnifying glass icon circled)
- Supplier ID: 0000065733
- Supplier Name: Metroplex Piano Inc
- Quote Number: ?
- Beginning Date: ?
- \*Unit of Measure: EA
- \*Currency Code: USD
- Quote Date: ?
- Date of Completion: ?

Additional information fields include 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. There is an 'Add to Cart' button at the bottom.

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

The screenshot shows the 'Look Up Category' page in the EIS system. The page title is 'Look Up Category' and the user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02'. The page contains a search form with the following elements:

- Note: You may either Search or Browse to look up the appropriate category for your special request.
- Search Categories: Search By Category (dropdown menu) [Find]
- Browse Category Tree: [Return]

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

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

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

Look Up Category

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

Search Categories

Search By: **Category** / Description  Find

Browse Category Tree

Return

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

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

11. Click **Find**.

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

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

Look Up Category

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

Search Categories

Search By: Description  Furniture Find

Browse Category Tree

Return

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

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

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

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

Look Up Category

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

Search Categories

Search By: Description  Furniture Find

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

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

Browse Category Tree

Return

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

The screenshot shows the 'Create Requisition' page. The main form is titled 'New Requisition' and includes the following fields and options:

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

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

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

The screenshot shows the 'Suggested Supplier' page. The form is titled 'Suggested Supplier' and includes the following fields and sections:

- Supplier Name:** (empty)
- Contact Name:** (empty)
- Address Information:**
  - Country:** (empty)
  - Address 1:** (empty)
  - Address 2:** (empty)
  - Address 3:** (empty)
  - City:** (empty)
  - State:** (empty)
  - Postal:** (empty)
- Phone Information:**
  - Phone Type:** (empty)
  - Prefix:** (empty)
  - Telephone:** (empty)
  - Ext:** (empty)
- Comments:** (empty text area)

At the bottom, there are 'OK' and 'Cancel' buttons. A note indicates '254 characters remaining' for the comments field.

15. Click **OK**.

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

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

**Suggested Supplier**

Supplier Name

Contact Name

**Address Information**

Country

Address 1

Address 2

Address 3

City

State  Postal

**Phone Information**

Phone Type  Prefix

Telephone  Ext

Comments

254 characters remaining

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

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

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

**Create Requisition** ?

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

Request Options ▾ Search All ▾  Advanced Search

All Request Options

ePro Services  
**New Requisition**

Web

Forms

Favorites

Recently Ordered

External Catalogs

**New Requisition**

\*Goods/Service Description

Quantity  \*Unit of Measure

Amount  \*Currency Code

\*Category

Supplier ID

Supplier Name

Quote Number  ? Suggested Supplier

Beginning Date  ? Quote Date  ?

Date of Completion  ?

**Additional Information**

Send to Supplier  Show at Receipt  Show at Voucher



16. Enter **Quote Number**.

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

The screenshot shows the 'Create Requisition' page in the Enterprise Information System. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The page title is 'Create Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/22/2016 09:06:43'. The page includes a search bar and an 'Advanced Search' link. The main content area is titled 'New Requisition' and contains the following fields:

- \*Goods/Service Description: Petrof Baby Grand Piano
- Quantity: 1
- Amount: 19,500.00
- \*Category: 931-46
- Supplier ID: 0000065733
- Supplier Name: Metroplex Piano Inc
- Quote Number: (highlighted with a red circle)
- Beginning Date: (calendar icon)
- \*Unit of Measure: EA
- \*Currency Code: USD
- Quote Date: (calendar icon)
- Date of Completion: (calendar icon)

Additional information fields include 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. There is an 'Add to Cart' button at the bottom.

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

The screenshot shows the 'Create Requisition' page in the Enterprise Information System. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The page title is 'Create Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/22/2016 12:42:53'. The page includes a search bar and an 'Advanced Search' link. The main content area is titled 'New Requisition' and contains the following fields:

- \*Goods/Service Description: Petrof Baby Grand Piano
- Quantity: 1
- Amount: 19,500.00
- \*Category: 931-46
- Supplier ID: 0000065733
- Supplier Name: Metroplex Piano Inc
- Quote Number: 888888888
- Beginning Date: (calendar icon)
- \*Unit of Measure: EA
- \*Currency Code: USD
- Quote Date: (calendar icon, highlighted with a red circle)
- Date of Completion: (calendar icon)

Additional information fields include 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. There is an 'Add to Cart' button at the bottom.

18. Select the date the quote was received.

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

Create Requisition ?

Welcome Business Services-Gen

Request Options Search All Search Advanced Search

All Request Options  
ePro Services  
New Requisition  
Web  
Forms  
Favorites  
Recently Ordered  
External Catalogs

**New Requisition**

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

Additional Information

Send to Supplier  Show at Receipt  Show at Voucher

Add to Cart

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

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

Create Requisition ?

Welcome Business Services-Gen

Request Options Search All Search Advanced Search

All Request Options  
ePro Services  
New Requisition  
Web  
Forms  
Favorites  
Recently Ordered  
External Catalogs

**New Requisition**

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

Additional Information

Send to Supplier  Show at Receipt  Show at Voucher

Add to Cart

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

Enterprise Information System  
 mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02

Create Requisition ?

Welcome Business Services-Gen

Request Options: Search [All] Search Advanced Search

All Request Options

- ePro Services
- New Requisition**
- Web
- Forms
- Favorites
- Recently Ordered
- External Catalogs

**New Requisition**

\*Goods/Service Description: Petrof Baby Grand Piano

Quantity: 1 \*Unit of Measure: EA

Amount: 19,500.00 \*Currency Code: USD

\*Category: PROCUREMENT

Supplier ID: 0000065733 Suggest New Supplier

Supplier Name: Metroplex Plano Inc

Quote Number: 888888888 ? Quote Date: 02/08/2016

Beginning Date: ? Date of Completion: ?

Additional Information

Send to Supplier  Show at Receipt  Show at Voucher

Add to Cart

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

Enterprise Information System  
 mmt0110 on FSTSTU (easapp12) - 02/20/2016 13:13:02

Create Requisition ?

Welcome Business Services-Gen

Request Options: Search [All] Search Advanced Search

All Request Options

- ePro Services
- New Requisition**
- Web
- Forms
- Favorites
- Recently Ordered
- External Catalogs

**New Requisition**

\*Goods/Service Description: Petrof Baby Grand Piano

Quantity: 1 \*Unit of Measure: EA

Amount: 19,500.00 \*Currency Code: USD

\*Category: PROCUREMENT

Supplier ID: 0000065733 Suggest New Supplier

Supplier Name: Metroplex Plano Inc

Quote Number: 888888888 ? Quote Date: 02/08/2016

Beginning Date: 02/15/2016 Date of Completion: 02/15/2016

Additional Information

Send to Supplier  Show at Receipt  Show at Voucher

Add to Cart

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

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

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

Create Requisition

Welcome Business Services-Gen

Request Options: Search All

**New Requisition**

\*Goods/Service Description: Petrof Baby Grand Piano  
Quantity: 1  
Amount: 19,500.00  
\*Category: 931-46  
Supplier ID: 0000065733  
Supplier Name: Metropolex Piano Inc  
Quote Number: 888888888  
Beginning Date: 02/15/2016

\*Unit of Measure: EA  
\*Currency Code: USD

Quote Date: 02/08/2016  
Date of Completion: [Calendar]

Additional Information

Send to Supplier  Show at Receipt  Show at Voucher

Add to Cart

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

24. Click **Add to Cart**.

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

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

Create Requisition

Welcome Business Services-Gen

Request Options: Search All

**New Requisition**

\*Goods/Service Description: Petrof Baby Grand Piano  
Quantity: 1  
Amount: 19,500.00  
\*Category: 931-46  
Supplier ID: 0000065733  
Supplier Name: Metropolex Piano Inc  
Quote Number: 888888888  
Beginning Date: 02/15/2016

\*Unit of Measure: EA  
\*Currency Code: USD

Quote Date: 02/08/2016  
Date of Completion: 02/29/2016

**Additional Information**

Send to Supplier  Show at Receipt  Show at Voucher

Add to Cart

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


The screenshot displays the 'Create Requisition' interface in the EIS system. The breadcrumb trail at the top reads: Favorites > Main Menu > Employee Self-Service > Procurement > Requisition. The user is logged in as 'mmt0110 on FSTSTU (easapp12)' on '02/20/2016 13:13:02'. A search bar is present with 'All' selected and a search button. The page title is 'Create Requisition'. Below the title, there are navigation links: 'Welcome', 'Business Services-Gen', 'Home', 'My Preferences', 'Requisition Settings', and a 'Shopping Cart' icon showing '2 Lines'. A 'Checkout' button is also visible. The main content area is titled 'New Requisition' and contains the following fields:

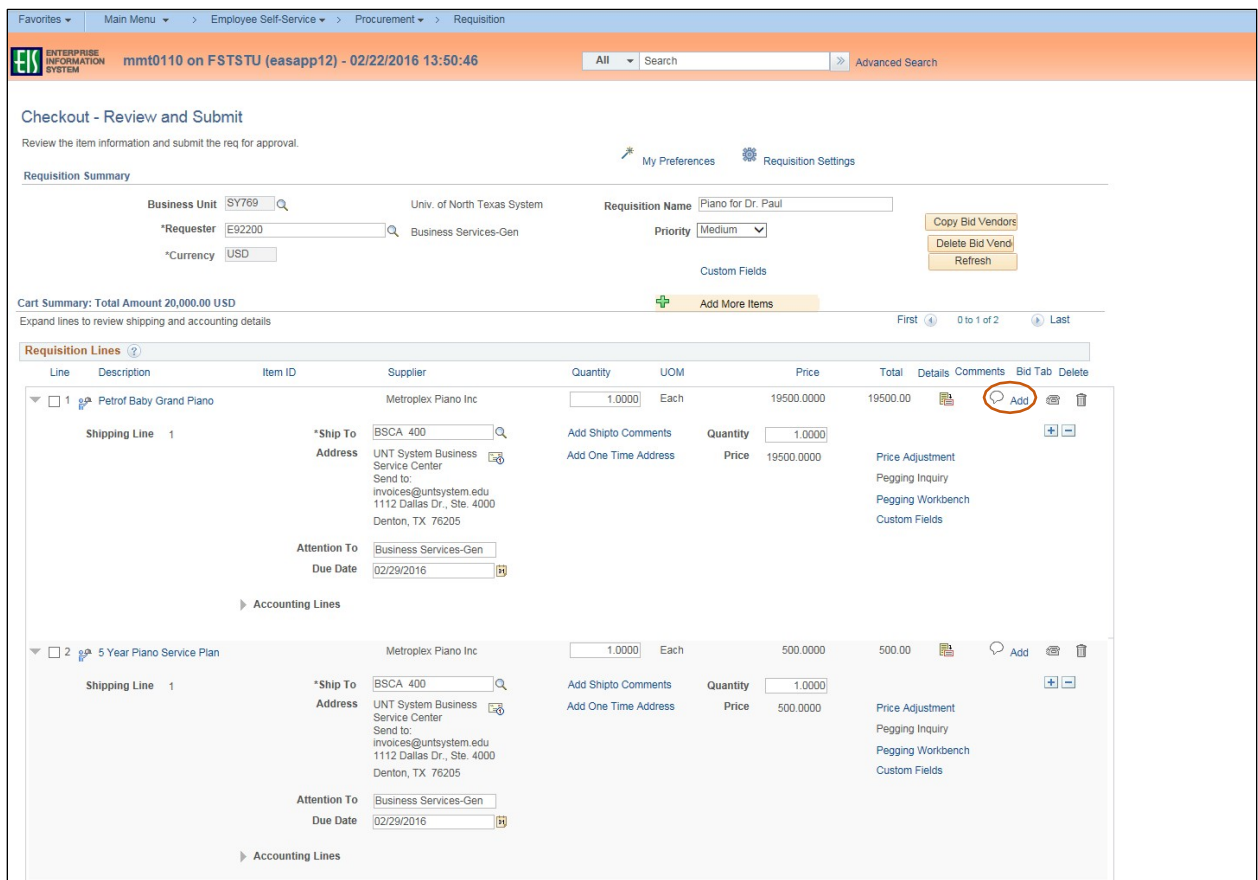
- \*Goods/Service: [Text input]
- Description: [Text input]
- Quantity: [Text input]
- \*Unit of Measure: [Text input]
- Amount: [Text input]
- \*Currency Code: [Text input, value: USD]
- \*Category: [Text input]
- Supplier ID: [Text input, value: 000065733]
- Suggest New Supplier: [Text input]
- Supplier Name: [Text input, value: Metroplex Piano Inc]
- Quote Number: [Text input]
- Quote Date: [Text input]
- Beginning Date: [Text input]
- Date of Completion: [Text input]

Below these fields is an 'Additional Information' section with a large text area and a 'Send to Supplier' checkbox. At the bottom, there are checkboxes for 'Show at Receipt' and 'Show at Voucher', and an 'Add to Cart' button.

## Reviewing Requisition Details

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

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



Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

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

Copy Bid Vendors  
Delete Bid Vendl  
Refresh

Custom Fields

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

Requisition Lines

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

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

Line Comment

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

Line 1

Comments      Find      First 1 of 1 Last

Use Standard Comments      Entered On:      + -

1

Send to Supplier     Show at Receipt     Show at Voucher

Add Attachments

Attachments

OK      Cancel

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

Line Comment

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

Line 1

Comments      Find      First 1 of 1 Last

Use Standard Comments      Entered On:      + -

1

Send to Supplier     Show at Receipt     Show at Voucher

Add Attachments

Attachments

OK      Cancel

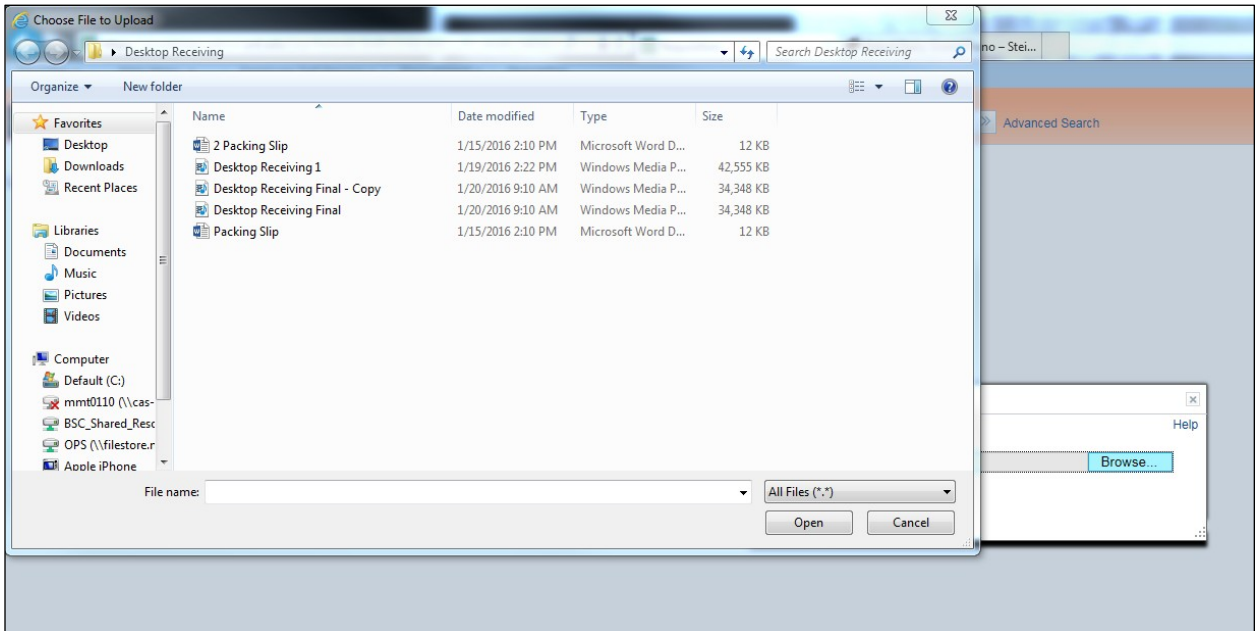
File Attachment

Help

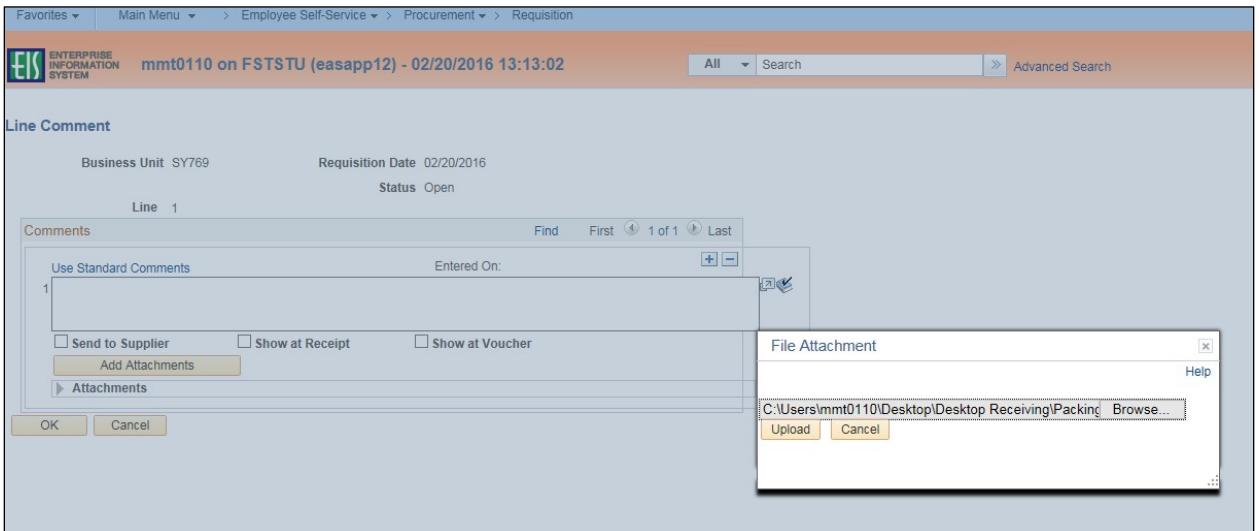
Browse...

Upload      Cancel

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



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





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

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

Line Comment

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

Line 1

Comments Find First 1 of 1 Last

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


1

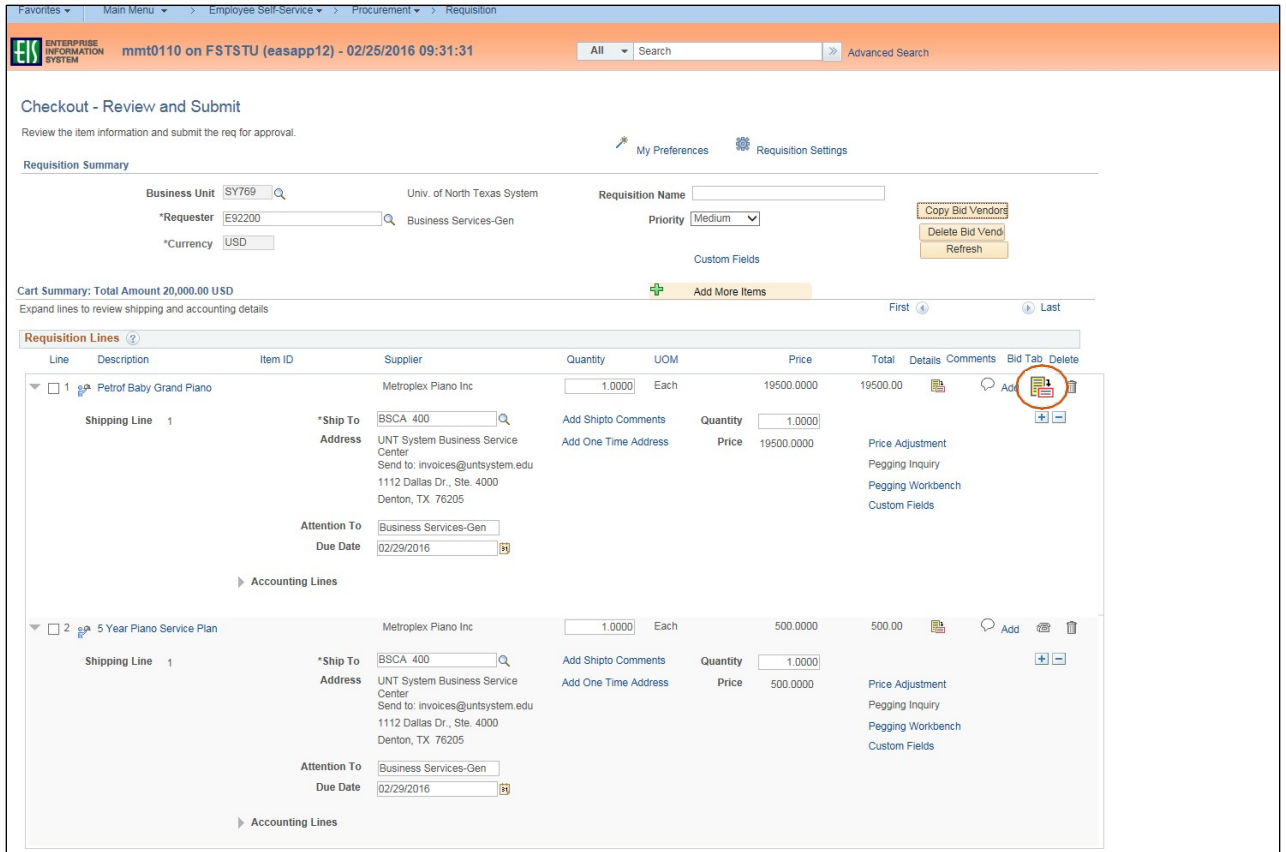
Send to Supplier   
  Show at Receipt   
  Show at Voucher

Add Attachments

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

OK Cancel

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







Checkout - Review and Submit

Review the item information and submit the req for approval.

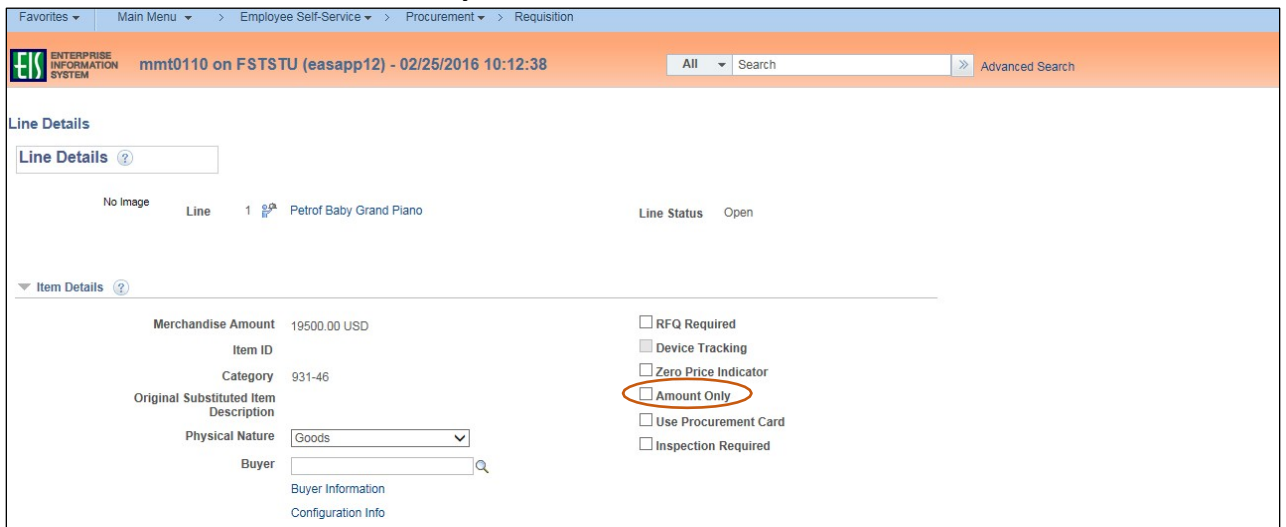
Requisition Summary

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

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

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

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



Line Details

Line Details

No Image Line 1 Petrol Baby Grand Piano Line Status Open

Item Details

Merchandise Amount 19500.00 USD

Item ID

Category 931-46

Original Substituted Item Description

Physical Nature Goods

Buyer

Buyer Information

Configuration Info

RFQ Required

Device Tracking

Zero Price Indicator

Amount Only

Use Procurement Card

Inspection Required

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

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

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

### Line Details

**Line Details** ?

No Image Line 1 Petrof Baby Grand Piano Line Status Open

---

#### Item Details

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

---

#### Contract Information

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

---

#### Supplier Information

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

---

#### Manufacturer Information

Manufacturer ID    
Manufacturer  
Manufacturer's Item ID    
GTIN

---

#### Sourcing Controls

Consolidate with other Reqs  
 Calculate Price  
 Override Suggested Supplier

---

#### Custom Fields

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

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

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

### Checkout - Review and Submit

Review the item information and submit the req for approval.

**Requisition Summary**

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

\*Requester: E92200 | Business Services-Gen

\*Currency: USD

Buttons: Copy Bid Vendor, Delete Bid Vendors, Refresh

Cart Summary: Total Amount 20,000.00 USD

Expand lines to review shipping and accounting details

**Requisition Lines**

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

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

Total Amount: 20,000.00 USD

**Shipping Summary**

Edit for All Lines

Ship To Location: BSCA 400

Address: UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205

Attention To: Business Services-Gen

Comments:

**Requisition Comments and Attachments**

Enter requisition comments

Buttons: Send to Supplier, Show at Receipt, Shown at Voucher

**Approval Justification**

Enter approval justification for this requisition

Buttons: Check Budget, Pre-Check Budget, Submit, Save Before Submit, Add More Items, Preview Approvals

**Add more Comments and Attachments** (circled in red)

17. Click **Use Standard Comments**.

Comments

Business Unit SY769 Requisition Date 02/06/2016 Status Open

Find First 1 of 1 Last

Use Standard Comments Entered On: [ ]

1

Send to Supplier  Show at Receipt  Show at Voucher

Add Attachments

Attachments

Attached File	User/Date Time	View	Send to Supplier
1		View	<input type="checkbox"/>

OK Cancel

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

Standard Comments

Search Criteria

Comment Type [ ] [ ] Search

Comment ID [ ] [ ] Reset

Description [ ]

OK Cancel

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

Look Up Comment Type

SetID SHARE

Standard Comment Type begins with [ ]

Description begins with [ ]

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-8 of 8 Last

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

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

Standard Comments

Search Criteria

Comment Type REQ  Search

Comment ID   Reset

Description

OK Cancel

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

Standard Comments

Search Criteria

Comment Type REQ  Search

Comment ID   Reset

Description

OK Cancel

Look Up Comment ID

SetID SHARE

Standard Comment Type REQ

Standard Comment ID begins with

Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1 of 1 Last

Standard Comment ID	Description
JUST	Req Comments Justification

22. Click **OK**.

Standard Comments

Search Criteria

Comment Type REQ  Search

Comment ID JUST  Reset

Description

OK Cancel

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

Standard Comments

Search Criteria

Comment Type: REQ Search

Comment ID: JUST Reset

Description: [Empty]

Standard Comments Find First 1 of 1 Last

Select	Comment Type	REQ	Comment ID	JUST
<input type="checkbox"/>	Description	Req Comments	Justification	
	Department Contact: Full name, full phone number and email address Vendor Contact: Full name, full phone number, fax number and email address Special Instructions: Include any special shipping, payment or deadlines Attachments: Refer to any attachments such as contracts or quotes Purpose: Advise how this purchase will be used, what benefit is gained			

Append To Comments

Override Comments

OK Cancel

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

24. Click **OK**.

Standard Comments

Search Criteria

Comment Type: REQ Search

Comment ID: JUST Reset

Description: [Empty]

Standard Comments Find First 1 of 1 Last

Select	Comment Type	REQ	Comment ID	JUST
<input checked="" type="checkbox"/>	Description	Req Comments	Justification	
	Department Contact: Full name, full phone number and email address Vendor Contact: Full name, full phone number, fax number and email address Special Instructions: Include any special shipping, payment or deadlines Attachments: Refer to any attachments such as contracts or quotes Purpose: Advise how this purchase will be used, what benefit is gained			

Append To Comments

Override Comments

OK Cancel

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

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

26. Click **OK**.

The screenshot displays the 'Comments' dialog box within the EIS interface. The dialog title is 'Comments' and it includes a 'Find' field and navigation buttons (First, 1 of 1, Last). The main text area contains the following content:

Use Standard Comments Entered On: [ ] [ ]  
 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  
 Purpose: This purchase will allow Professor Paul to complete the composition of a concert which could result in grants and

Below the text area, there are three checkboxes:  Send to Supplier,  Show at Receipt, and  Show at Voucher. An 'Add Attachments' button is located below these checkboxes.

The 'Attachments' section is a table with the following structure:

Attached File	User/Date Time	View	Send to Supplier
1		View	<input type="checkbox"/>

At the bottom of the dialog, there are 'OK' and 'Cancel' buttons.



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

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

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

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

Requisition Comments and Attachments

Enter requisition comments

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

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

**Approval Justification**

Enter approval justification for this requisition

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

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

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

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

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

### Checkout - Review and Submit

Review the item information and submit the req for approval.

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

**Requisition Summary**

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

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

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

**Requisition Lines**

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

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

Total Amount 20,000.00 USD

**Shipping Summary**

[Edit for All Lines](#)

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

**Requisition Comments and Attachments**

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


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

**Approval Justification**

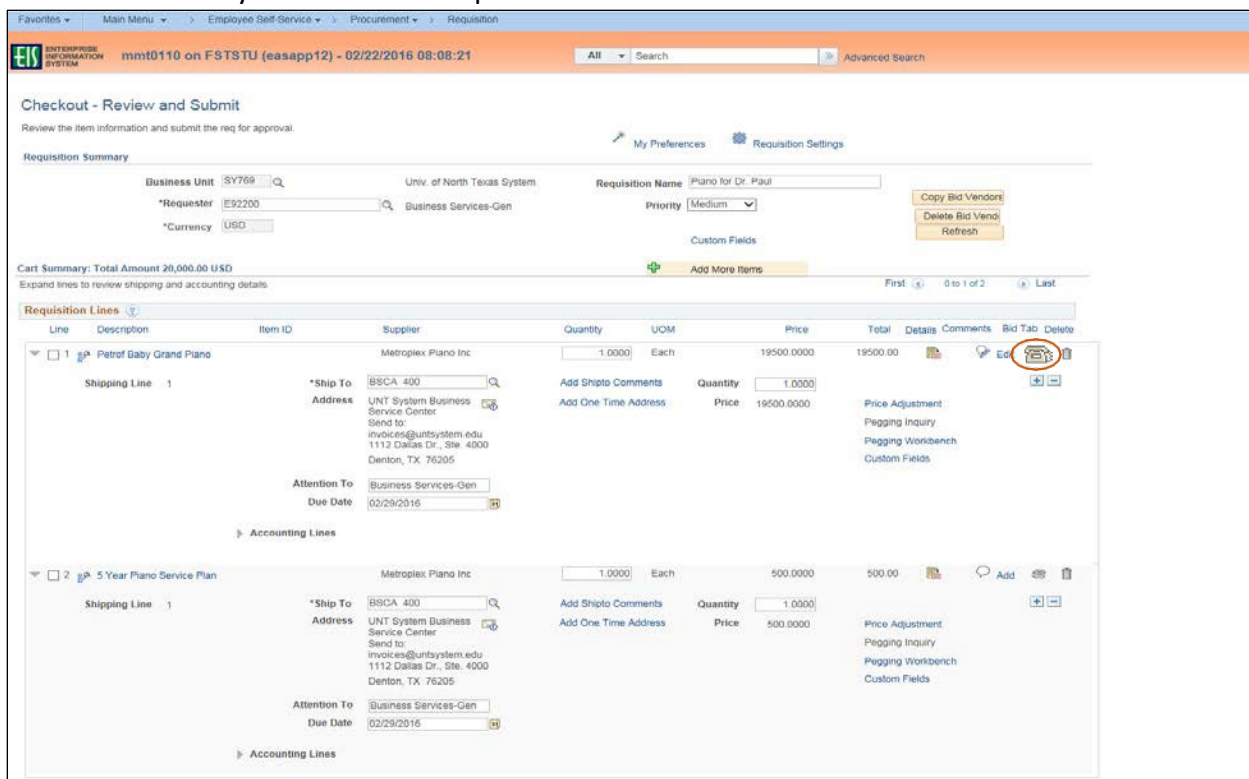
Enter approval justification for this requisition  
 The purchase of this specialty piano will allow Professor Paul to complete and perform the composition of a concert which could result in grants and national recognition for the UNT System.

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

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

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

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







Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

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

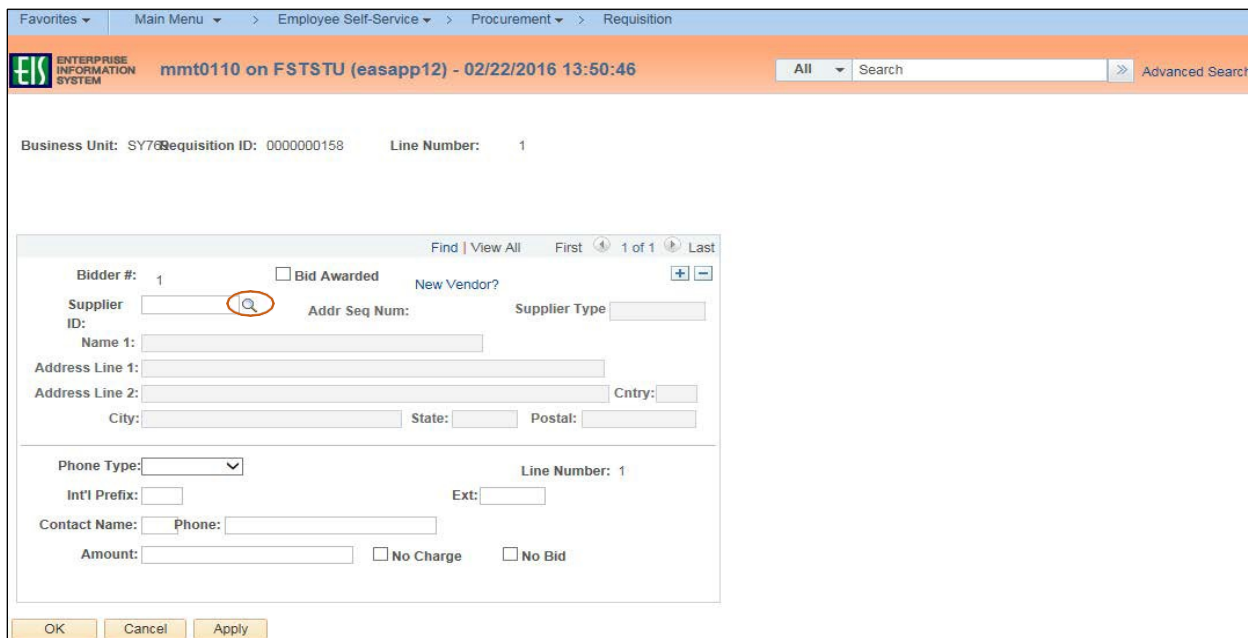
Cart Summary: Total Amount 20,000.00 USD

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

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


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

32. Skip to step 37.



Business Unit: SY769 Requisition ID: 000000158 Line Number: 1

Bidder #: 1  Bid Awarded New Vendor?

Supplier ID:   Addr Seq Num:  Supplier Type:

Name 1:

Address Line 1:

Address Line 2:  Cntry:

City:  State:  Postal:

Phone Type:  Line Number: 1

Int'l Prefix:  Ext:

Contact Name:  Phone:

Amount:   No Charge  No Bid

OK Cancel Apply

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

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

Supplier ID	Name 1	Open For Ordering	Supplier Type	Default Location	Address Sequence Number	Postal Code
000000001	UNT Payroll	Y	(blank)	999	1	76203-0000
000000003	ATHLETIC DEPT WKING FUND	Y	(blank)	999	1	76203-0000
000000004	Delta Sigma Theta Sorority, Inc.	Y	(blank)	000	1	76203
000000005	Zeta Phi Beta	Y	(blank)	999	1	76206
000000009	Model International Org	Y	(blank)	999	1	76203
000000017	Tajlismonte State A	Y	(blank)	000	1	4448 142
000000024	Beta Alpha Psi-UNT Chapter	Y	(blank)	999	1	76203-5219
000000029	NABA - UNT Student Chapter	Y	(blank)	888	2	76203-5219
000000038	Computers Etc	Y	(blank)	001	1	75112
000000040	Test Vendor 1	N	(blank)	001	1	76201
000000041	Learning Inc.	Y	(blank)	TX	1	77777
000000044	UNT SY769	Y	(blank)	000	1	76205
000000045	UNT NT752	Y	(blank)	000	1	76205
000000046	UNT DL773	Y	(blank)	000	1	75241
000000047	UNT H5763	Y	(blank)	000	1	76107
000000048	eaw0144Testing	Y	(blank)		1	76228
000000049	Bun Electronic Systems Inc	Y	(blank)	000	1	32790
000000050	eaw0144-TINS TEST	Y	(blank)	000	1	76228
000000051	line interface test 2	Y	(blank)	000	1	76226
000000052	Byron, Michael J	Y	(blank)	000	1	63112
000000056	Alpha Delta Pi	Y	(blank)	000	2	70623
000000066	PHI SIGMA PI	Y	(blank)	000	1	76209
000000067	Zeta Tau Alpha	Y	(blank)	999	1	76201
000000069	PHI KAPPA SIGMA	Y	(blank)	000	2	76201
000000093	Alpha Phi Sorority	Y	(blank)	999	1	76203
000000102	Eden Travel International Limited	Y	(blank)	000	1	NW4 1B2
000000123	SIGMA LAMBDA BETA	Y	(blank)	999	1	76201
000000148	Feminist Majority Leadership Alliance	Y	(blank)	000	5	76201
000000154	UNT Panhellenic	Y	(blank)	999	1	76203
000000200	Wells Fargo	Y	(blank)	007	1	76201
000000204	PSP VACUUM TECHNOLOGY	Y	(blank)	000	1	98110LR
000000230	University of Memphis	Y	(blank)	000	1	38152
000000235	Alpha Phi	Y	(blank)	000	3	76203
000000245	World Echoes	N	(blank)	999	2	76201

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

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

Find | View All First 1 of 1 Last

Bidder #: 1  Bid Awarded New Vendor?

Supplier ID:  Addr Seq Num:  Supplier Type

Name 1:

Address Line 1:

Address Line 2:  Cntry:

City:  State:  Postal:

Phone Type:  Line Number: 1

Int'l Prefix:  Ext:

Contact Name:  Phone:

Amount:   No Charge  No Bid

Look Up Supplier ID

SetID: SHARE

Supplier ID:  begins with

Name 1:  begins with  metroplex piano

Default Location:  begins with

Address Sequence Number:

Postal Code:  begins with

Basic Lookup

Search Results

View 100 First 1 of 1 Last

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

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

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

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

Find | View All First 1 of 1 Last

Bidder #: 1  Bid Awarded New Vendor?

Supplier ID: 0000065733 Addr Seq Num: 1 Supplier Type

Name 1: Metroplex Piano Inc

Address Line 1: 9292 LBJ Frwy

Address Line 2:  Cntry: USA

City: Dallas State: TX Postal:

Phone Type: Business Line Number: 1


Int'l Prefix:  Ext:

Contact Name: Kare Phone: 940-555-5555

Amount: 20,000.00  No Charge  No Bid

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

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

 ENTERPRISE INFORMATION SYSTEM **mmt0110 on FSTSTU (easapp12) - 02/22/2016 13:50:46**

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

---

Find | View 1 First 1-3 of 3 Last

**Bidder #:** 1  **Bid Awarded**  **New Vendor?**

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

**Name 1:** Metroplex Piano Inc

**Address Line 1:** 9292 LBJ Frwy

**Address Line 2:** **City:** Dallas **State:** TX **Postal:** **Cntry:** USA

---

**Phone Type:** Business **Line Number:** 1

**Int'l Prefix:** **Ext:**

**Contact Name:** Kare **Phone:** 940/555-5555

**Amount:** 20000.000  **No Charge**  **No Bid**

---

**Bidder #:** 2  **Bid Awarded**  **New Vendor?**

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

**Name 1:** Woods & Son Piano

**Address Line 1:** 14929 Harrison Street

**Address Line 2:** **City:** Brighton **State:** CO **Postal:** 75931 **Cntry:** USA

---

**Phone Type:** Business **Line Number:** 1

**Int'l Prefix:** **Ext:**

**Contact Name:** Ken **Phone:** 214/555-5555

**Amount:** 19000.000  **No Charge**  **No Bid**

---

**Bidder #:** 3  **Bid Awarded**  **New Vendor?**

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

**Name 1:** Collora Piano

**Address Line 1:** 1451 Wycliff Ave

**Address Line 2:** **City:** Dallas **State:** TX **Postal:** **Cntry:** USA

---

**Phone Type:** Business **Line Number:** 1

**Int'l Prefix:** **Ext:**

**Contact Name:** Kelly **Phone:** 469/555-5555

**Amount:**  **No Charge**  **No Bid**

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

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

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

### Checkout - Review and Submit

Review the item information and submit the req for approval.

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

**Requisition Summary**

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

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

Expand lines to review shipping and accounting details

First 0 to 1 of 2 Last

**Requisition Lines**

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

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

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

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

Checkout - Review and Submit

Requisition Summary

Business Unit: SY769, Unv. of North Texas System  
 \*Requester: E62200, Business Services-Gen  
 \*Currency: USD, Priority: Medium

Cart Summary: Total Amount 20,000.00 USD

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

**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	Percent	Merchandise Amt	GL Unit	Entry Event					
1	Open		BSCP 400	100.0000	1,000.00	SY769						

**Chartfields 2**

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



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

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

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

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

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

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

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

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

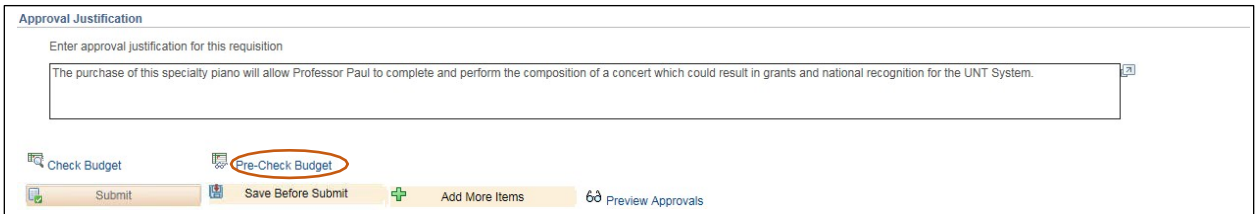
Accounting Lines														Personalize	Find	View All	First	1-2 of 2	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information													
Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate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

## Reviewing Budget and Approvals and Submitting the Requisition

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

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

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



Approval Justification


Enter approval justification for this requisition

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

Check Budget Pre-Check Budget

Submit Save Before Submit Add More Items 60 Preview Approvals

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



Approval Justification

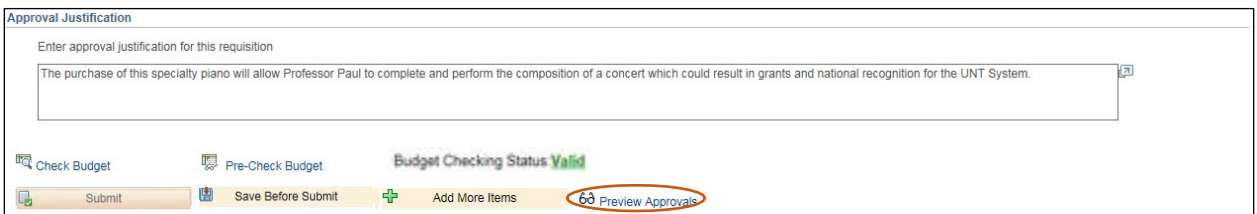
Enter approval justification for this requisition

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

Check Budget Pre-Check Budget Budget Checking Status Provisionally Valid

Submit Save Before Submit Add More Items 60 Preview Approvals

3. Click **Preview Approvals**.



Approval Justification

Enter approval justification for this requisition


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


Check Budget Pre-Check Budget Budget Checking Status Valid

Submit Save Before Submit Add More Items 60 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, follow steps 5-11 to ad hoc to the appropriate Approver.

- Click the green plus symbol to  add an Approver.

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


**Preview Approvals**

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




Business Unit SY769  
 Status Open  
 Priority Medium  
 Budget Status Not Checked

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


**Purchasing Approval**

Requisition 0000000162:Initiated  Start New Path

UNTS Buyer Approval




Not Routed  
  Multiple Approvers Purchasing Approval 


**UNTS Dept ID - ePro**

Line 1:Initiated  Start New Path

Petrof Baby Grand Piano




UNTS Department Approval

Not Routed  
  Asher, Donna Brooks Manager Fiduciary Approval 


Line 2:Initiated  Start New Path

5 Year Piano Service Plan

UNTS Department Approval




Not Routed  
  Asher, Donna Brooks Manager Fiduciary Approval 


**Purchasing Manager Approval**

Line 1:Initiated  Start New Path

Petrof Baby Grand Piano




Purchasing Manager Approval

Not Routed  
  Saxon, Randall J ePRO PURCHASE MGR APPRVL ALL 

Line 2:Initiated  Start New Path

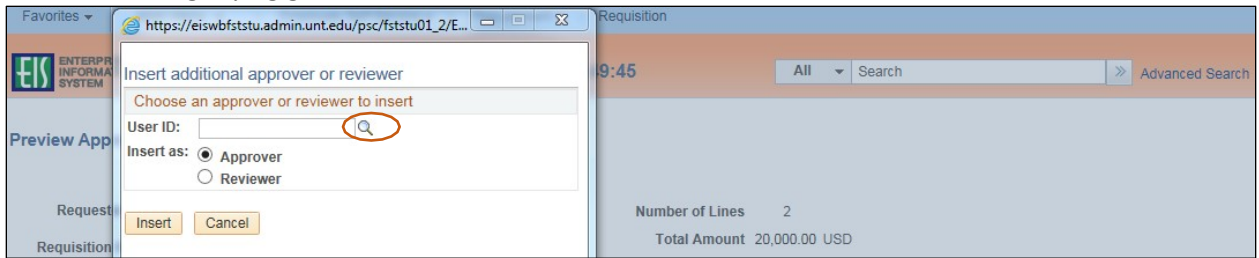
5 Year Piano Service Plan

Purchasing Manager Approval

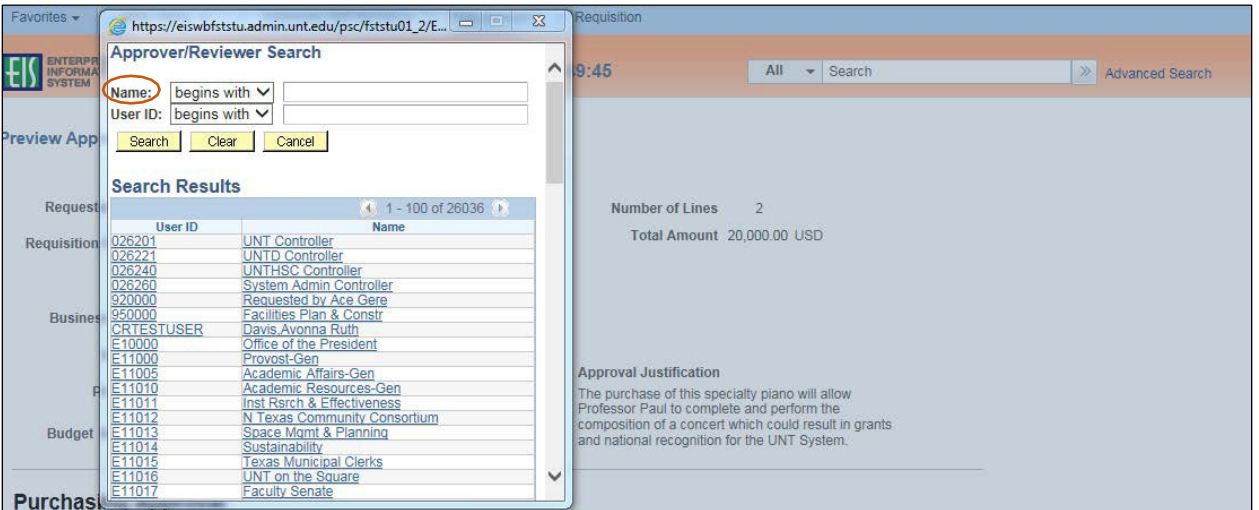
Not Routed  
  Saxon, Randall J ePRO PURCHASE MGR APPRVL ALL 

Return      Apply Approval Changes

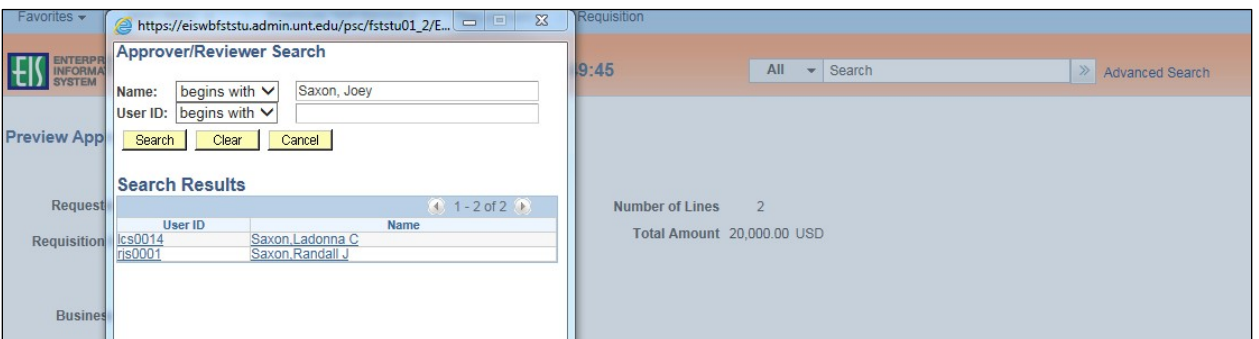
- Click on the magnifying glass beside the blank **User ID** field.



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

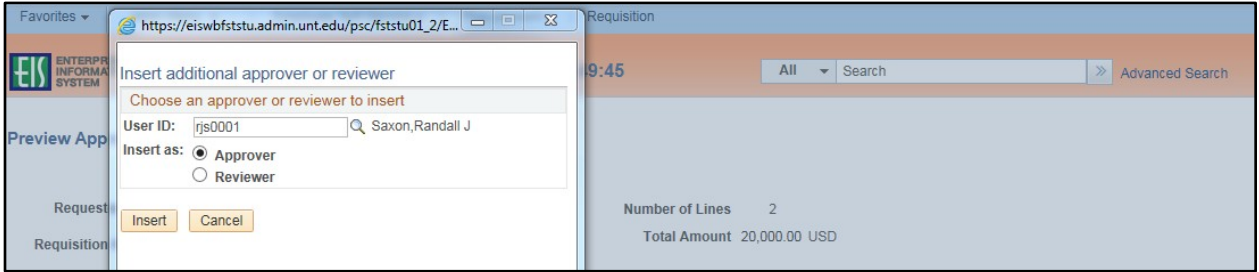


- Select the appropriate **Name** or **User ID** for the Approver you want to insert.



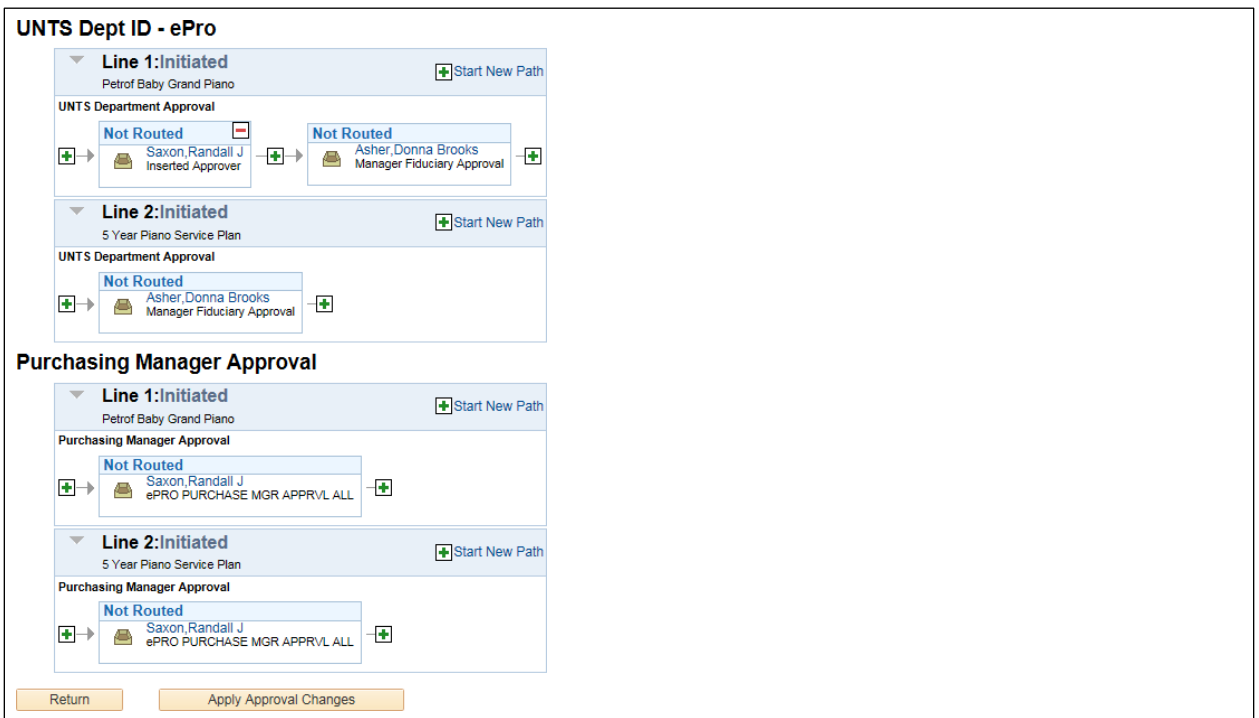
10. Click **Insert**.

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




11. Click **Apply Approval Changes**.

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



13. Click **Return**.

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

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

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**Preview Approvals**

Requested For	Business Services-Gen	Number of Lines	2
Requisition Name	0000000162	Total Amount	20,000.00 USD
Business Unit	SY769		
Status	Open		
Priority	Medium		
Budget Status	Not Checked		


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

---

**Purchasing Approval**

▼ **Requisition 0000000162:Initiated**    [Start New Path](#)

UNTS Buyer Approval



+ → **Not Routed** → +  
 Multiple Approvers Purchasing Approval

---

**UNTS Dept ID - ePro**


▼ **Line 1:Initiated**    [Start New Path](#)  
 Petrof Baby Grand Piano

UNTS Department Approval

+ → **Not Routed** → **Not Routed** → +  
 Saxon,Randall J Inserted Approver     Asher,Donna Brooks Manager Fiduciary Approval

▼ **Line 2:Initiated**    [Start New Path](#)  
 5 Year Piano Service Plan

UNTS Department Approval


+ → **Not Routed** → +  
 Asher,Donna Brooks Manager Fiduciary Approval

---

**Purchasing Manager Approval**


▼ **Line 1:Initiated**    [Start New Path](#)  
 Petrof Baby Grand Piano

Purchasing Manager Approval

+ → **Not Routed** → +  
 Saxon,Randall J ePRO PURCHASE MGR APPRVL ALL

▼ **Line 2:Initiated**    [Start New Path](#)  
 5 Year Piano Service Plan

Purchasing Manager Approval

+ → **Not Routed** → +  
 Saxon,Randall J ePRO PURCHASE MGR APPRVL ALL

14. Click **Submit**.

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

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

### Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

**Requisition Summary**

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

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

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

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Petrol Baby Grand Piano		Metroplex Piano Inc	1.0000	Each	19500.0000	19500.00				
<p><b>Shipping Line 1</b></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	5 Year Piano Service Plan		Metroplex Piano Inc	1.0000	Each	500.0000	500.00				
<p><b>Shipping Line 1</b></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 All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

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

**Shipping Summary**

Edit for All Lines

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

**Requisition Comments and Attachments**

Enter requisition comments

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

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

**Approval Justification**

Enter approval justification for this requisition

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

Check Budget Pre-Check Budget Budget Checking Status: Valid

Submit Save Before Submit Add More Items Preview Approvals

15. Review the **Confirmation** screen.

**EIS ENTERPRISE INFORMATION SYSTEM** mmt0110 on FSTSTU (easapp12) - 02/23/2016 09:49:45

Confirmation

Your requisition has been submitted.

Requested For	Business Services-Gen	Number of Lines	2
Requisition Name	0000000162	Total Amount	20,000.00 USD
Requisition ID	0000000162	Pre-Encumbrance Balance	Not Available
Business Unit	SY769	Approval Justification	The purchase of this specialty piano will allow Professor Paul to complete and perform the composition of a concert which could result in grants and national recognition for the UNT System.
Status	Pending		
Priority	Medium		
Budget Status	Valid		

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

**Purchasing Approval**

Requisition 0000000162: Pending   Start New Path

UNTS Buyer Approval

Pending

Multiple Approvers Purchasing Approval

**UNTS Dept ID - ePro**

**Line 1: Initiated**   Start New Path

Petrof Baby Grand Piano

UNTS Department Approval

Not Routed   Saxon, Randall J. Inserted Approver

Not Routed   Asher, Donna Brooks. Manager Fiduciary Approval

**Line 2: Initiated**   Start New Path

5 Year Piano Service Plan

UNTS Department Approval

Not Routed   Asher, Donna Brooks. Manager Fiduciary Approval

**Purchasing Manager Approval**

**Line 1: Initiated**   Start New Path

Petrof Baby Grand Piano

Purchasing Manager Approval

Not Routed   Saxon, Randall J. ePRO PURCHASE MGR APPRVL ALL

**Line 2: Initiated**   Start New Path

5 Year Piano Service Plan

Purchasing Manager Approval

Not Routed   Saxon, Randall J. ePRO PURCHASE MGR APPRVL ALL

Apply Approval Changes

Create New Requisition   Manage Requisitions

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

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

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