SOP #: 4.2.3.1	Area: Purchasing
Title: Purchases $15,000.00 and Under	Effective Date: 03-01-2016
Version #: 1.0	Revision Date: 09-30-2020
Approval Date: 02-25-2016	Review Date: N/A

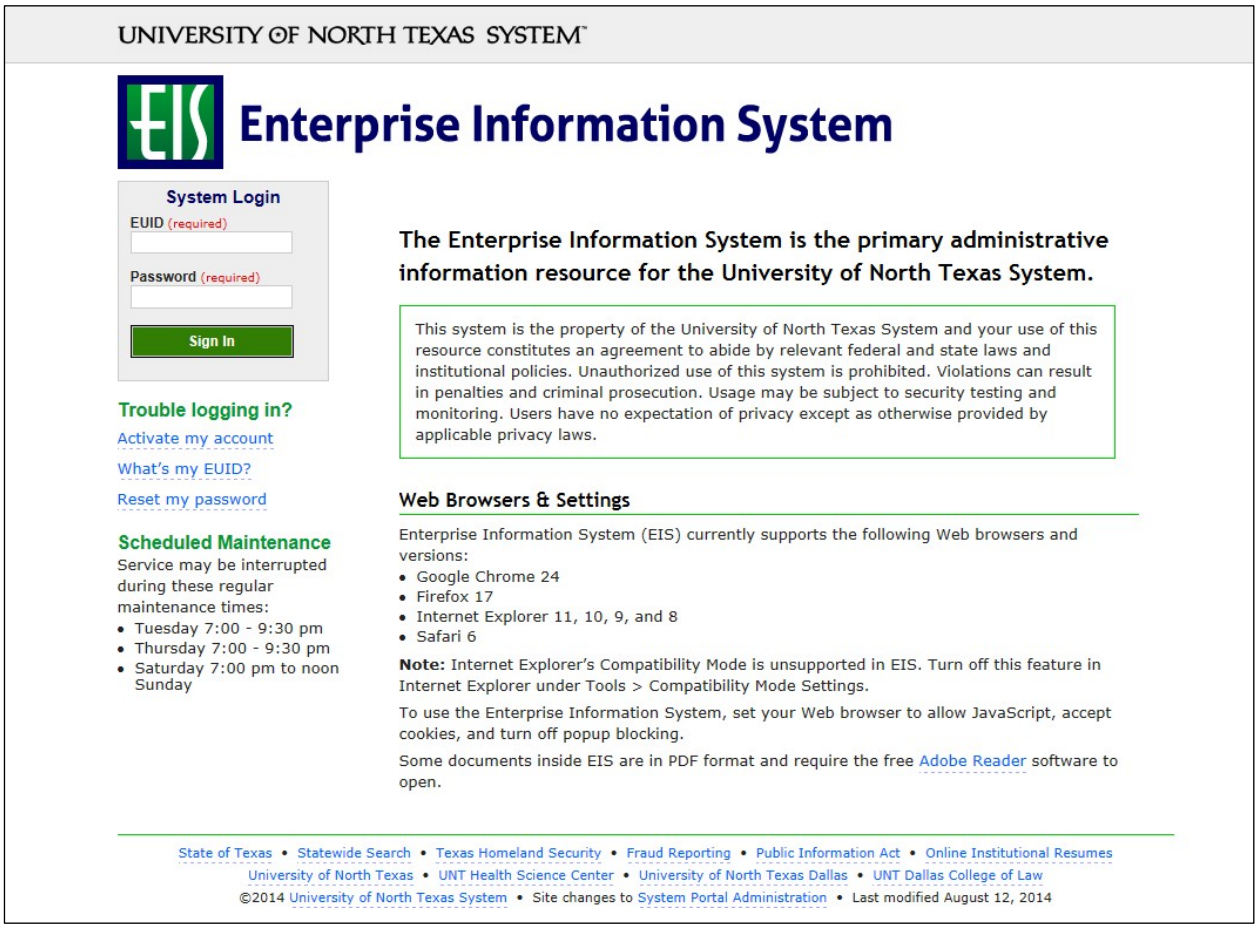
Title: Purchases $15,000.00 and under

Purchase transactions from $0 to $15,000.00 require one verbal bid or quote. Orders should be awarded to the vendor that provides the best value to the institution. Departments are encouraged to seek a quote or bid from a Historically Underutilized Business (HUB) vendor. For assistance finding a HUB vendor, click here or email HUB@untsystem.edu.

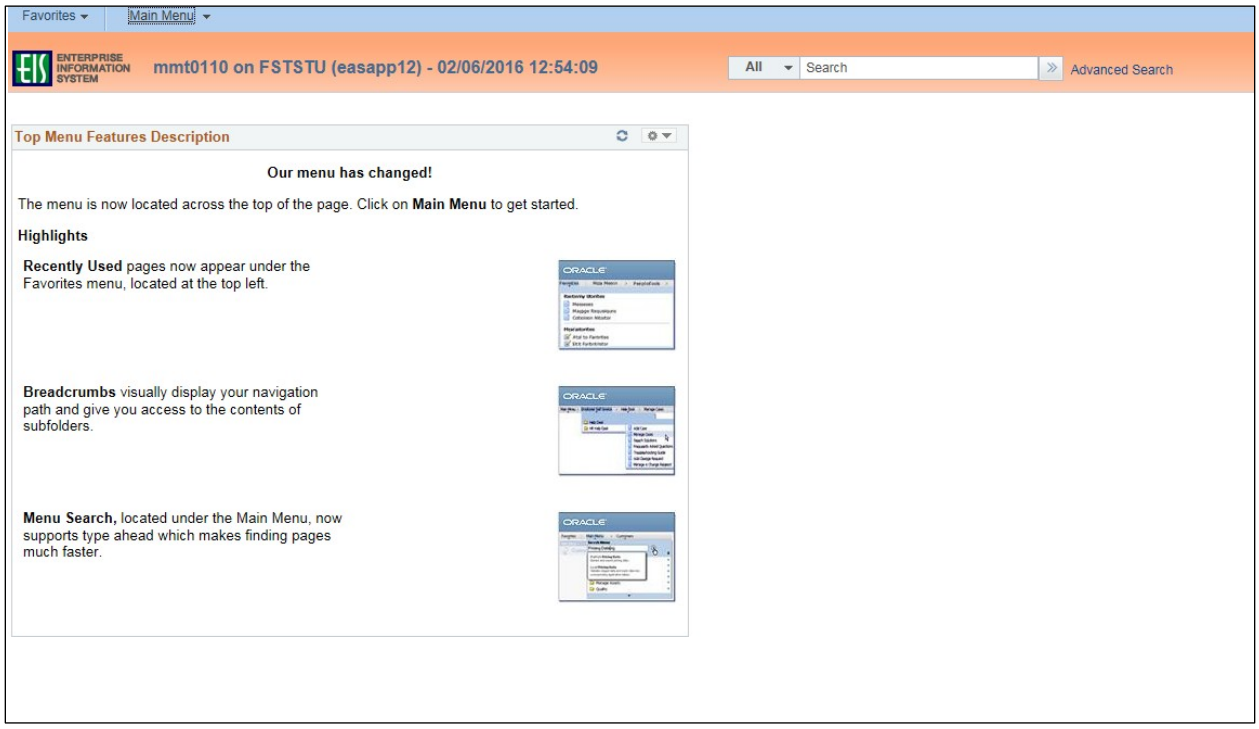
Setting up the Requisition

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

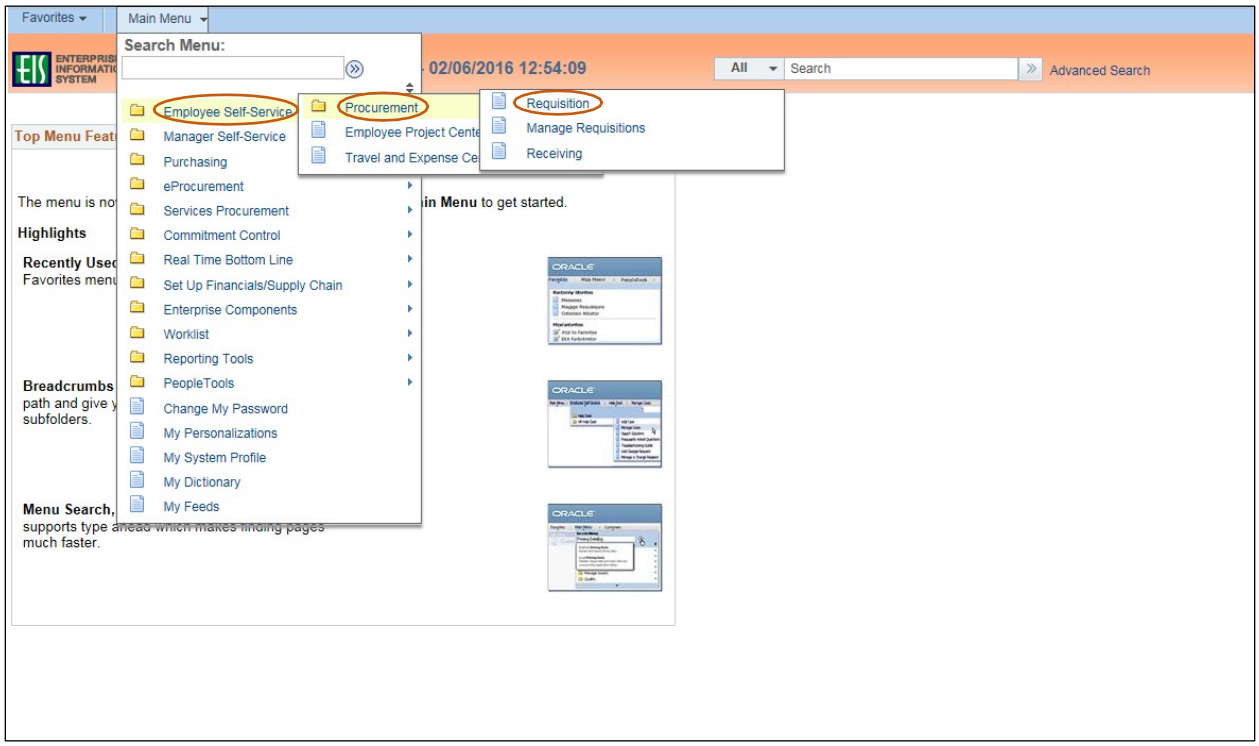
1. Request bid or quote from vendor.
   Note: Price quotes may be taken by phone, by fax, or by email. Prices may also be obtained via a vendor's website. Ensure vendors send invoices to Invoices@UNTSystem.edu. Ensure a reasonable amount of time is given to vendors to respond to a request for bid or quote.
2. Enter **EUID** and **Password**.
3. Click **Sign In**.



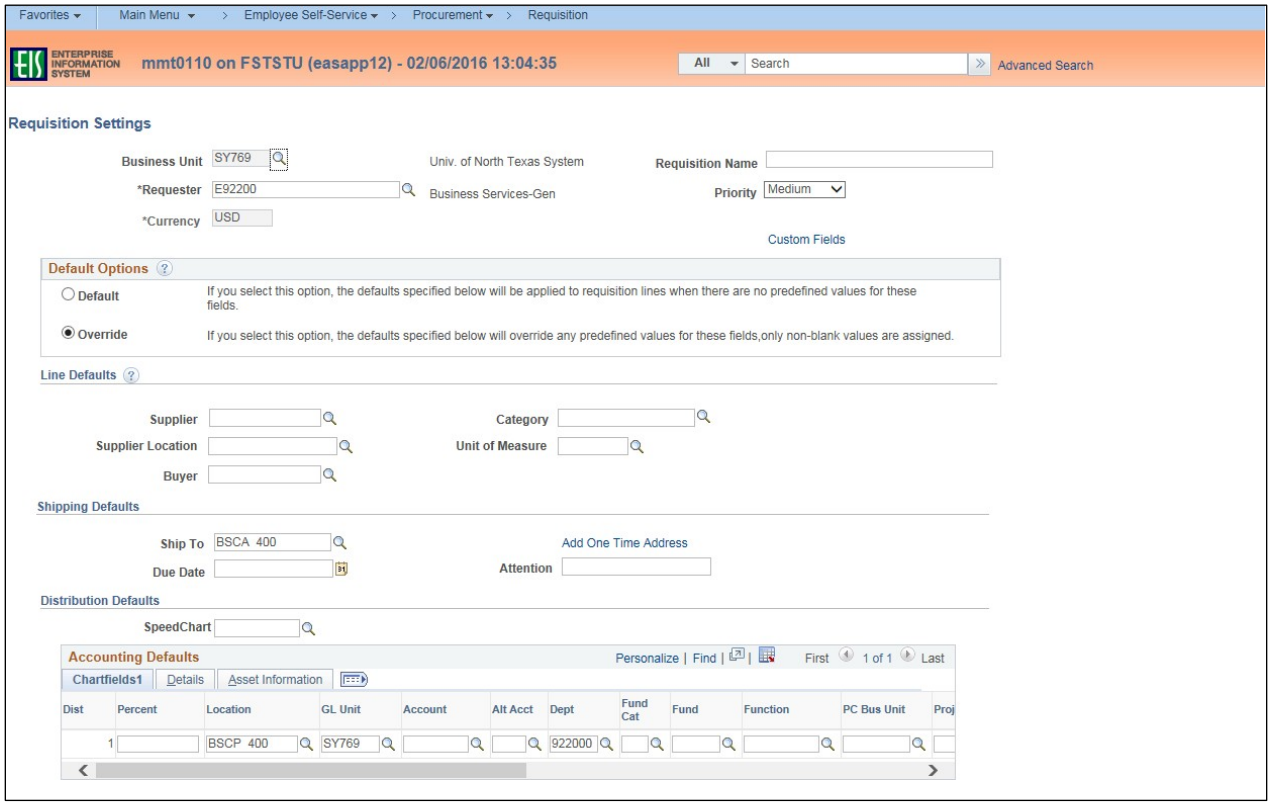
4. Click **Main Menu**.



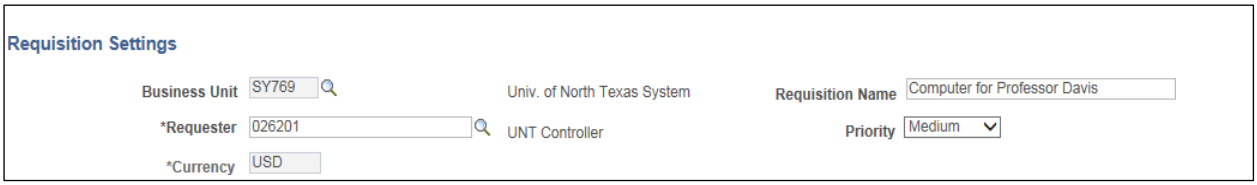
5. Navigate to **Requisition** by clicking on Employee Self-Service>Procurement>Requisition.



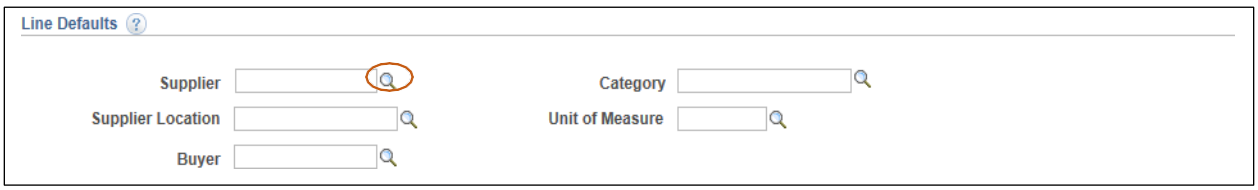
6. Verify that the information in the **Business Unit** and **Requester** fields is correct.



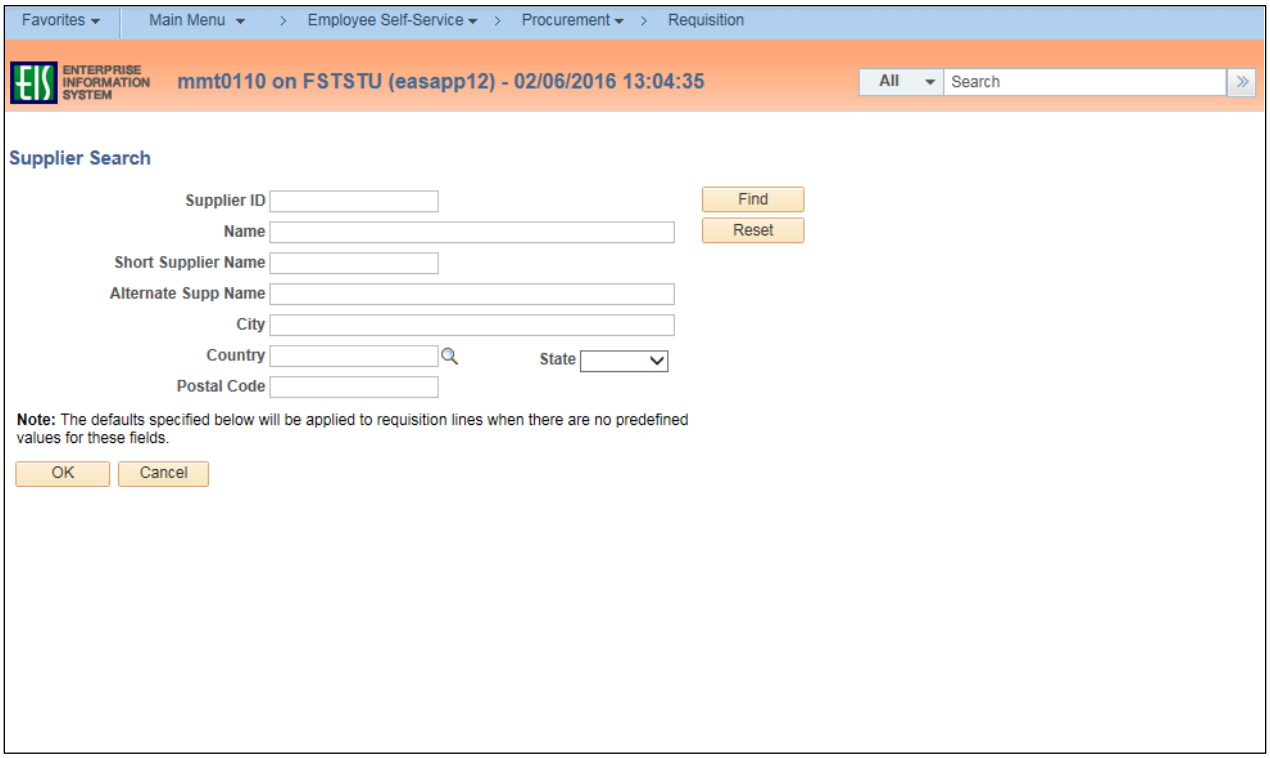
7. Enter **Requisition Name**.
   Note: Give the requisition a meaningful name, as it will be visible when using **Manage Requisitions**.



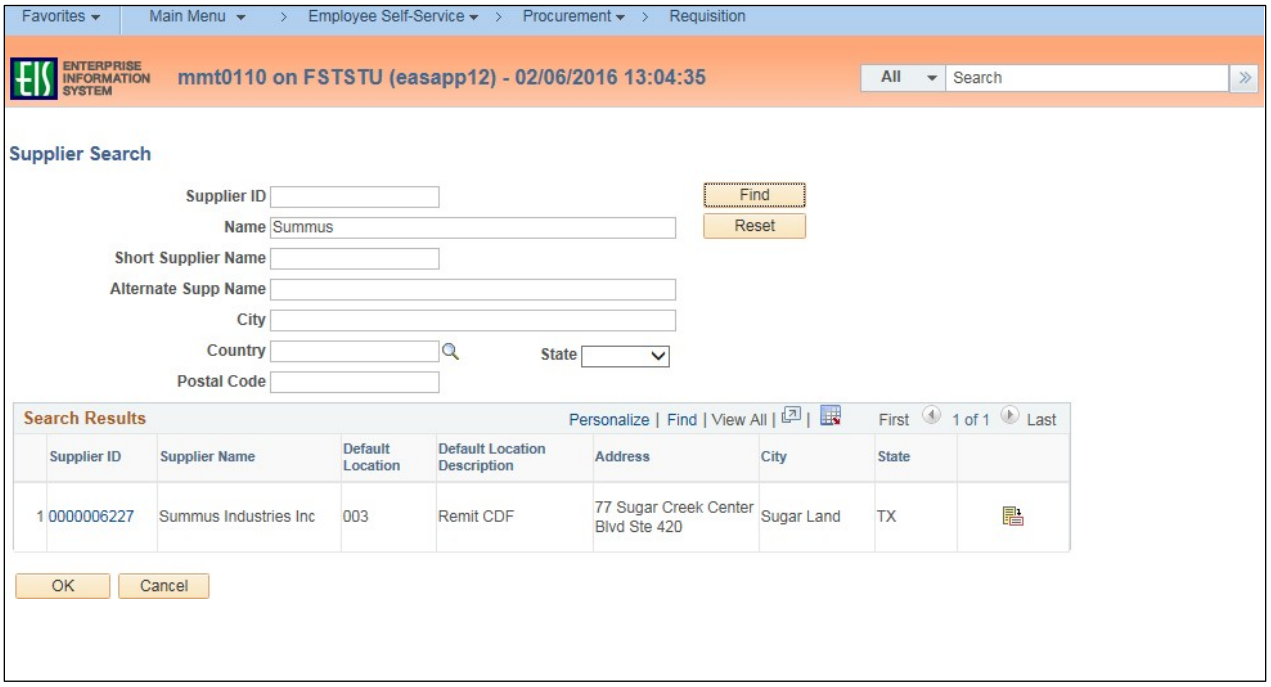
8. Click magnifying glass next to **Supplier** field.



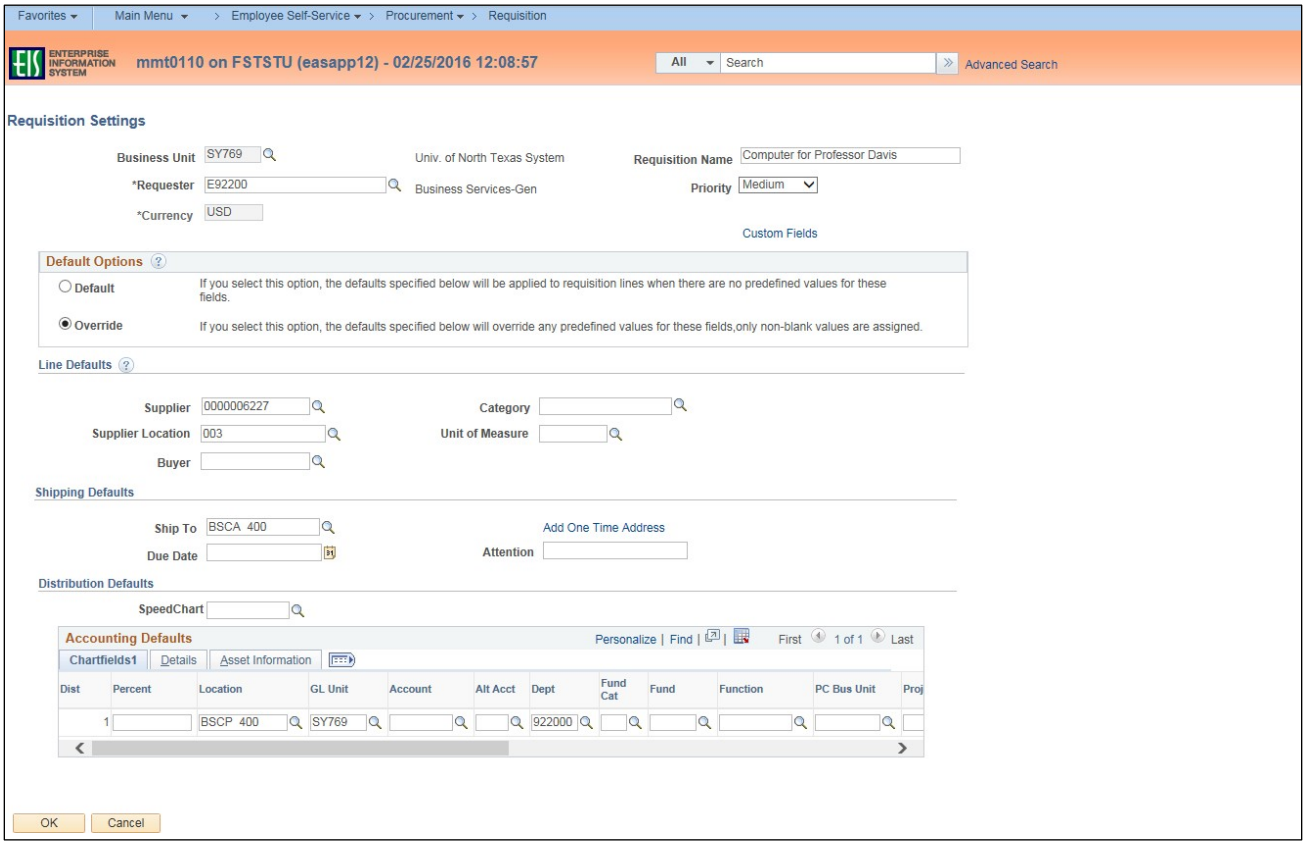
9. Enter vendor name into **Name** field.
10. Click **Find**.



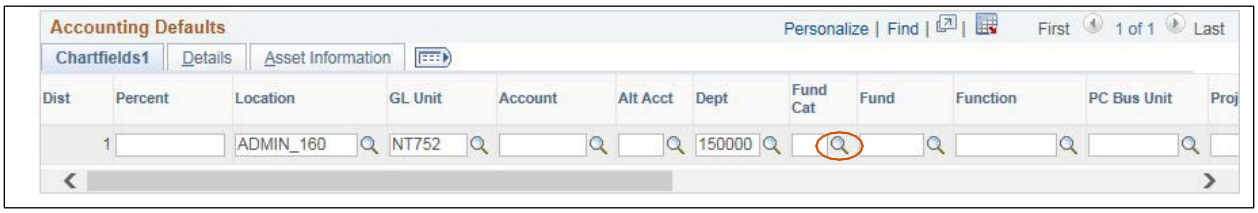
11. Select the appropriate **Supplier ID** from **Search Results**—confirming it lists the correct address. **Note**: If the appropriate **Supplier Name** does not appear in the **Search Results**, click **Cancel**. The Supplier and/or applicable address will be added later using the **Suggest New Supplier**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



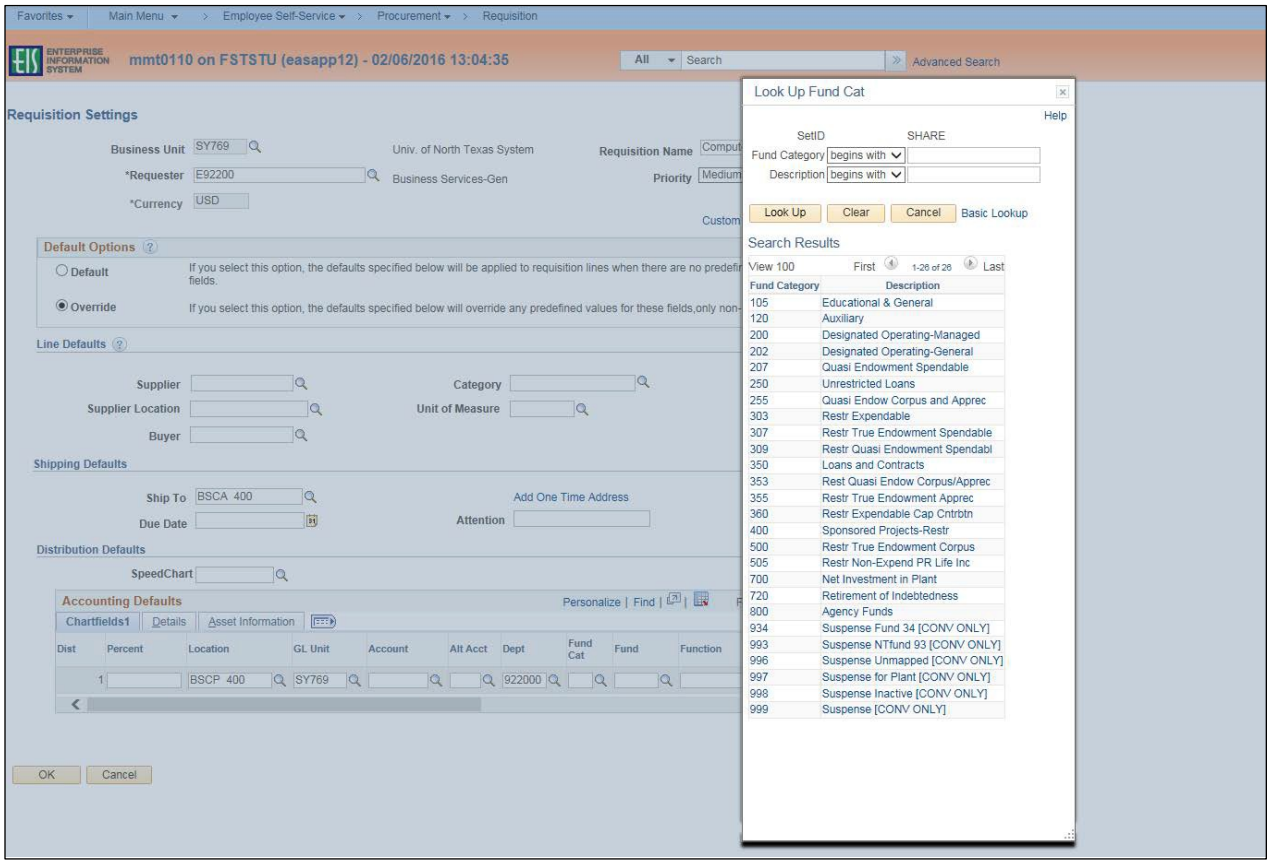
Note: **Requisition Settings** screen opens. The **Supplier ID** and **Default Location** will automatically be populated into the requisition in the **Supplier** and **Supplier Location** fields.



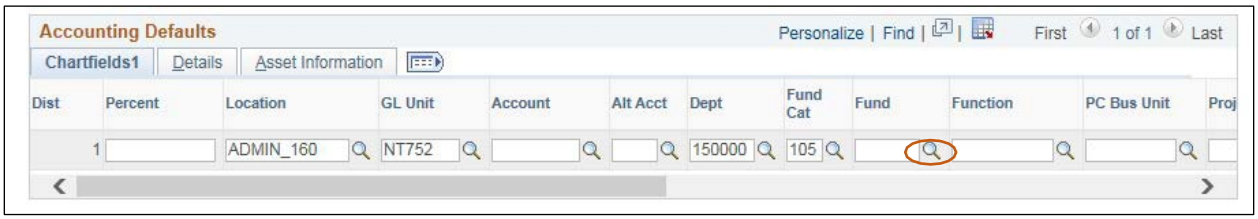
12. Click on the magnifying glass next to **Fund Cat**.
    Note: **Account** and **Alt Acct** should remain blank. These fields will be completed later.



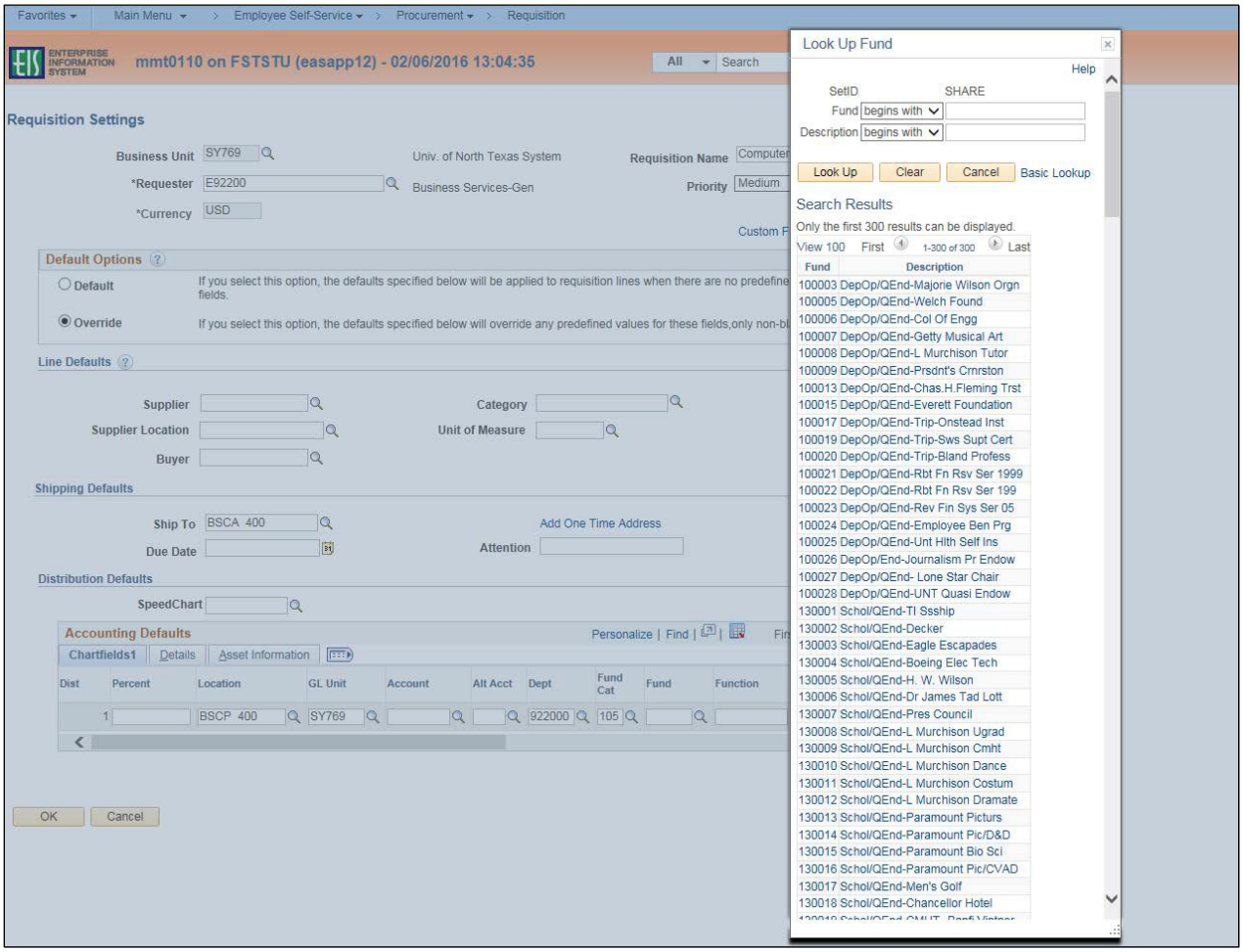
13. Select the appropriate **Fund Cat** from the **Look Up Fund Cat** dropdown.



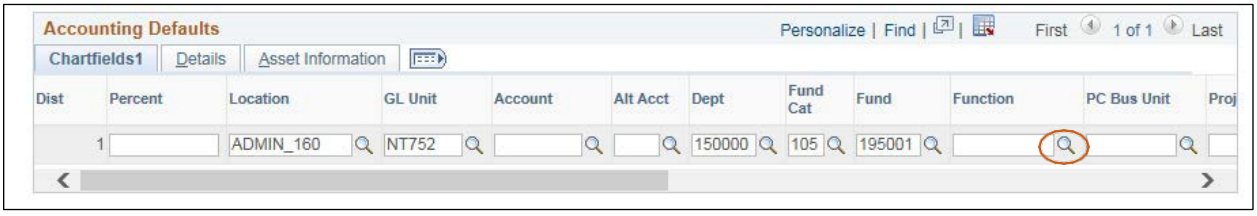
14. Click on the magnifying glass next to **Fund**.



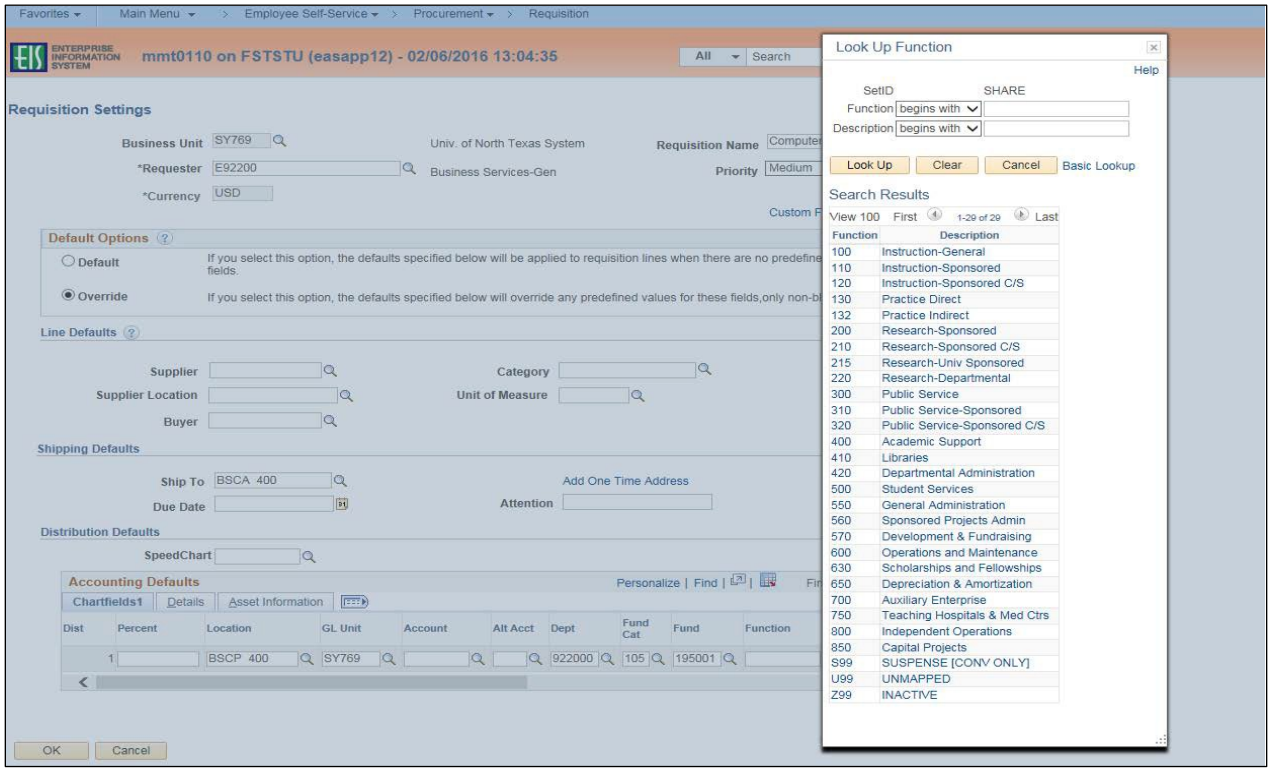
15. Select the appropriate **Fund** from the **Look Up Fund** dropdown.



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

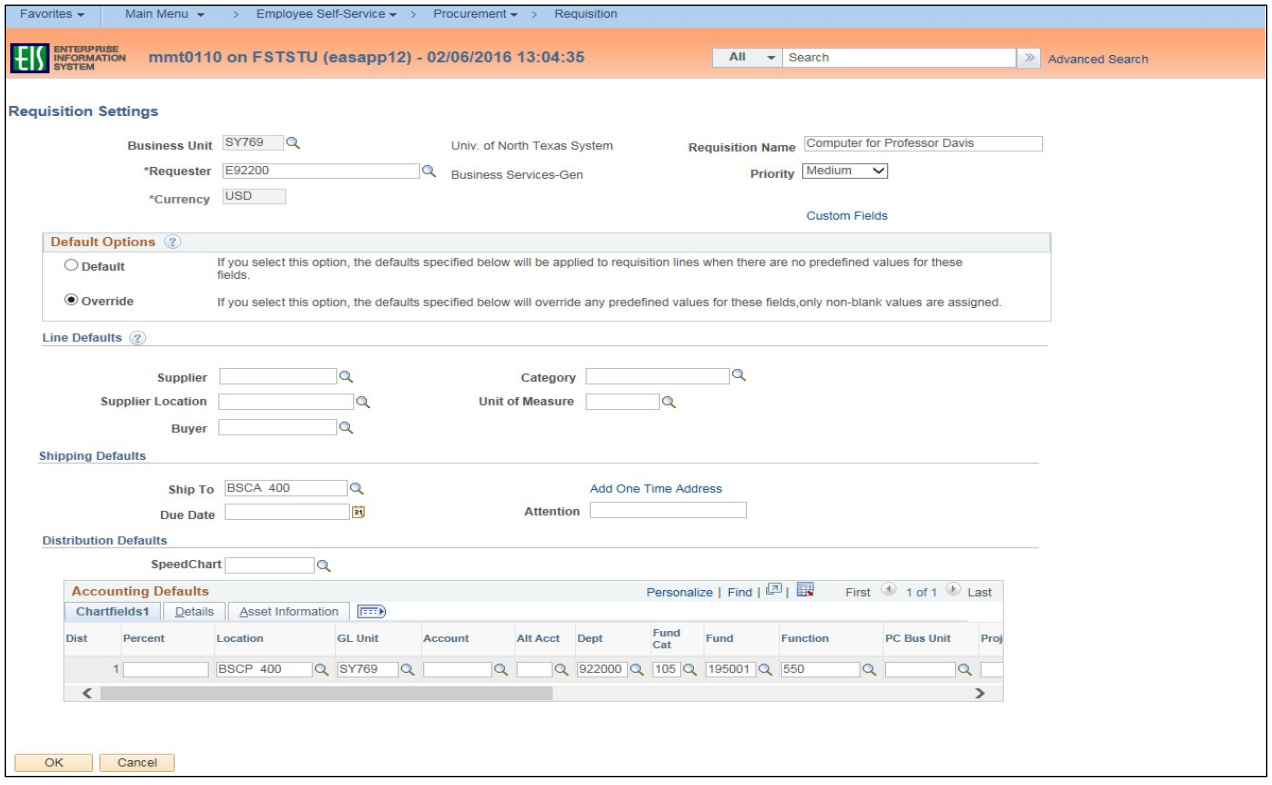


17. Select the appropriate **Function** from the **Look Up Function** dropdown.



18. 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: (See table below).

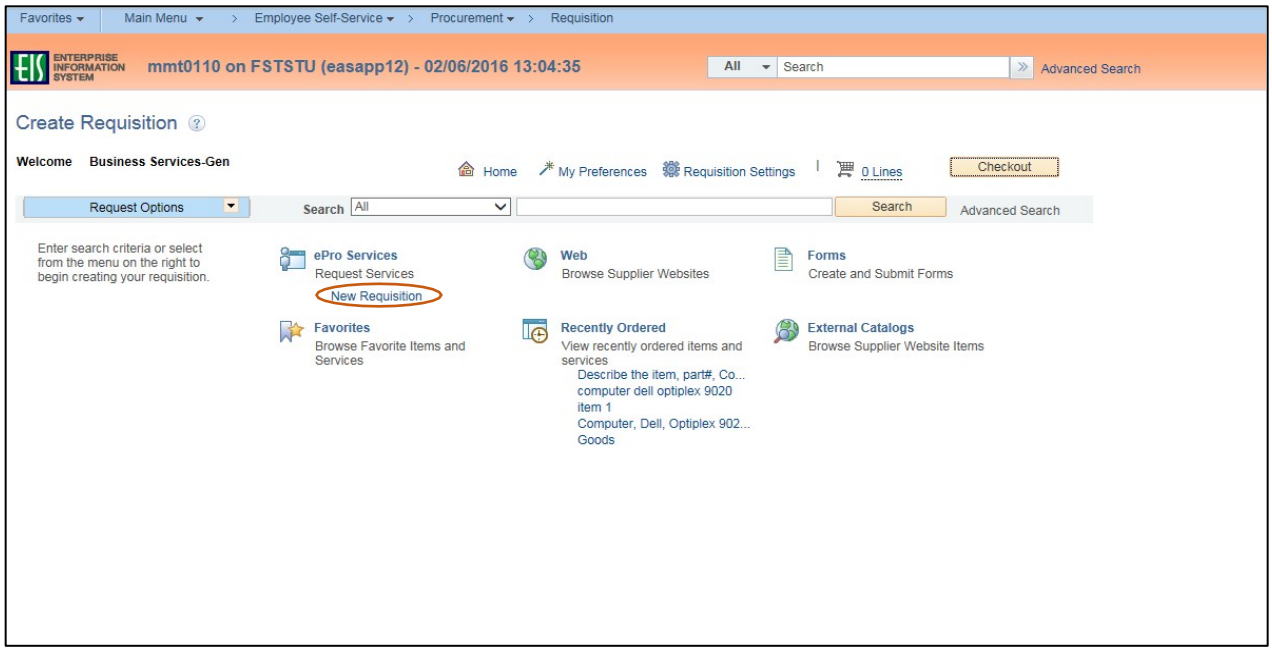
Track order using **Manage Requisitions**.

	Justification Comments	
Required	**Item**	**Notes**
Required	Department contact	Full name, phone number and email address
Required	Vendor contact	Full name, phone number and email address
Required	Purpose	What is it for? Why is it being purchased?
Required	Email Address	Where do we need to send the order?
Required	Procurement Method	Must be referenced (coop, contract, quotes)
Required	Service Date	When do need services performed or good received by?
	Supporting Documentation	
If applicable	HSP Form	If purchase is over 85k (or has the potential to go over 85k with change orders).
If applicable	Quotes	Attach all quotes
If applicable	Contract	If this purchase is made off an existing contract, attach copy of contract
If applicable	Previous PO number	What was the previous PO number? This helps with reporting
If applicable	Proprietary/Sole Source form	Must have VP or dept chair signature
If applicable	Request for Solicitation form	Attach for formal solicitations
If applicable	Conflict of Interest form	Attach when reporting COI
If applicable	Emails	Additional information on purchase/contract

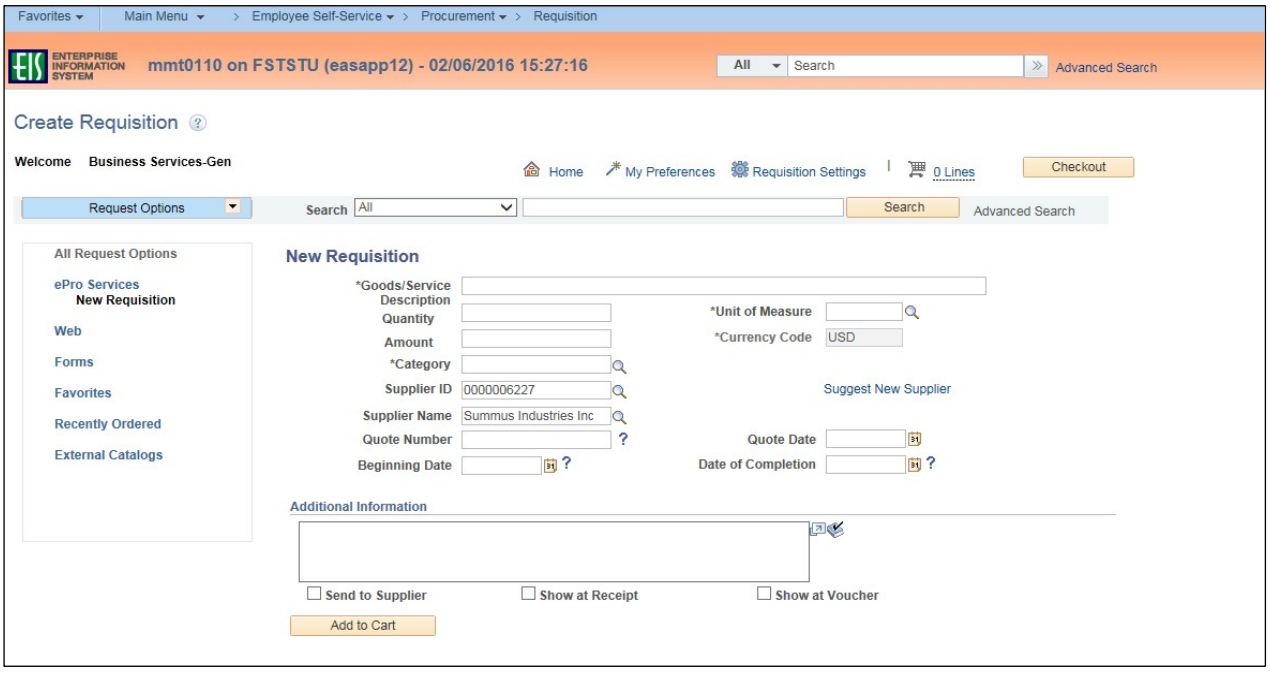
Creating the Requisition

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

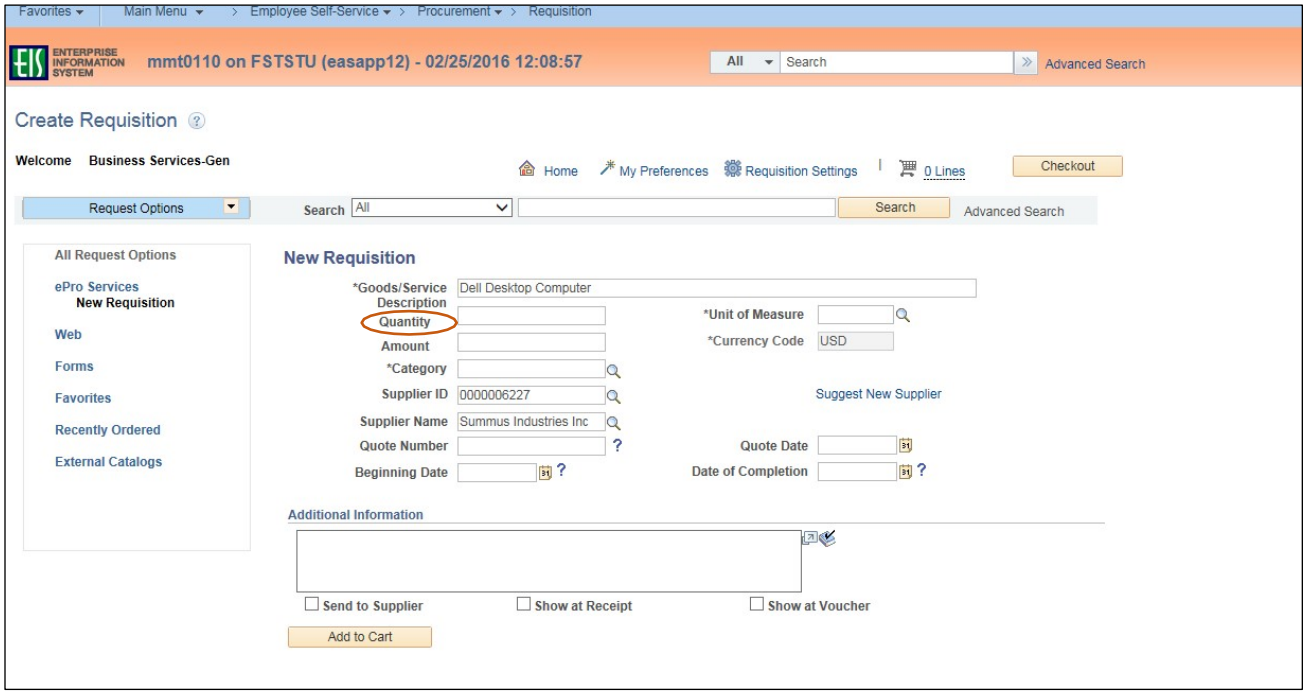
1. Click **New Requisition** under the **ePro Services** section.



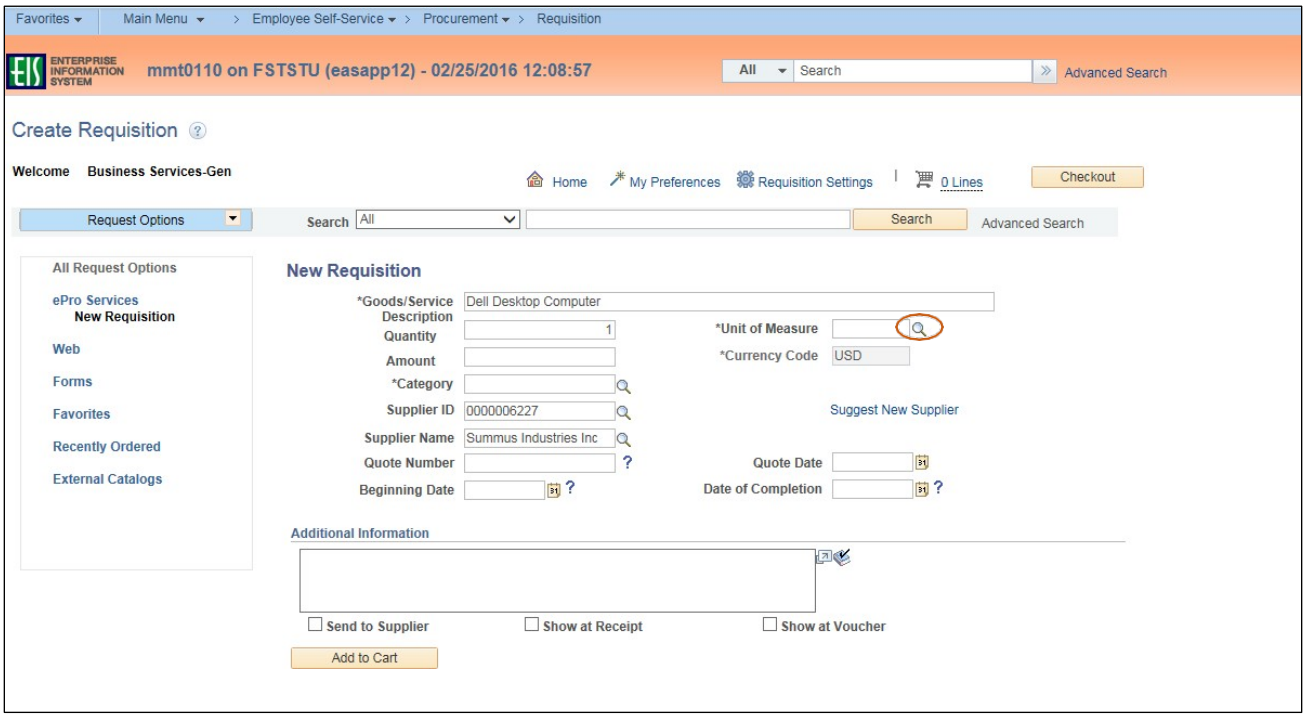
2. Type the line item description from the price bid or quote received from the vendor in the **Goods/Service Description** field.
Note: Descriptions should be concise, but complete and should include the part number, catalog number, or model number if available, along with a detailed description.



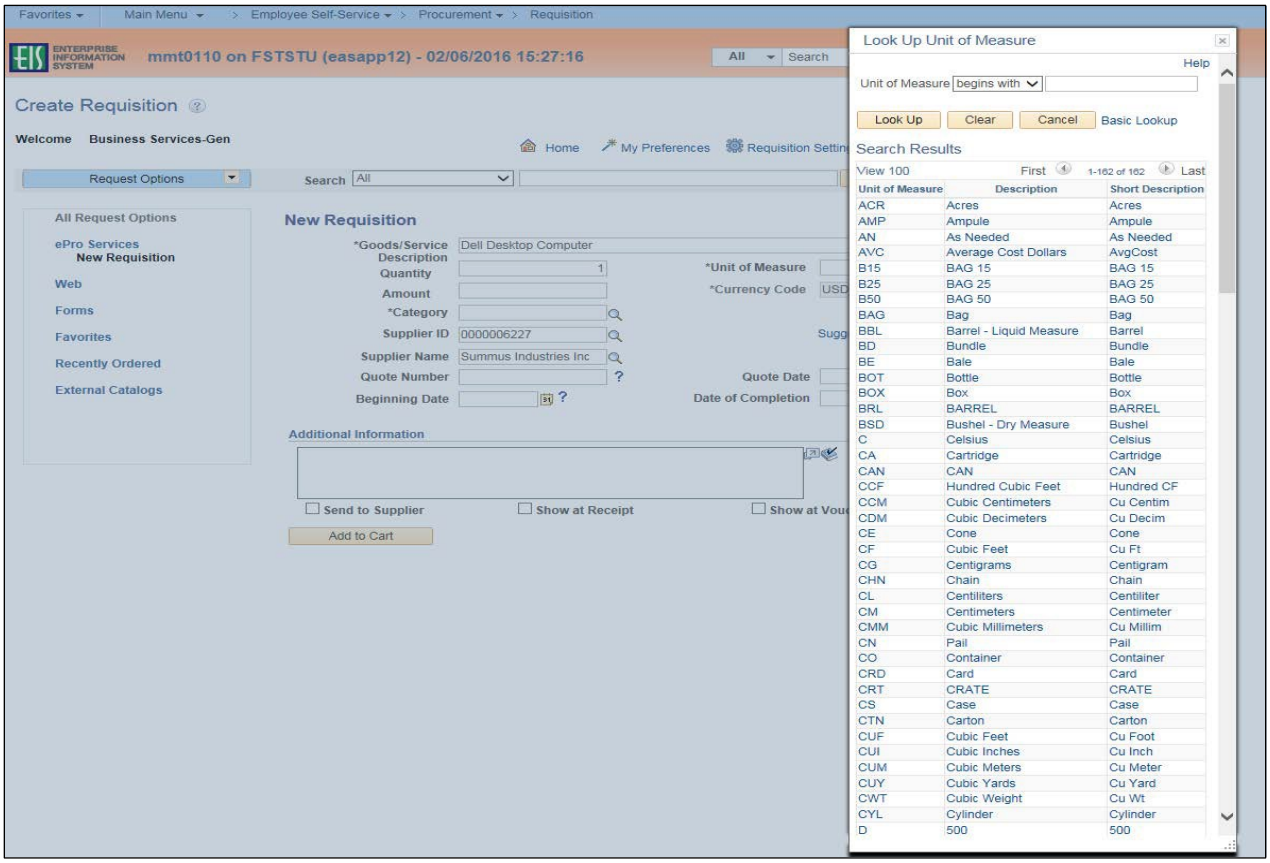
3. Type the number of items in **Quantity** field.



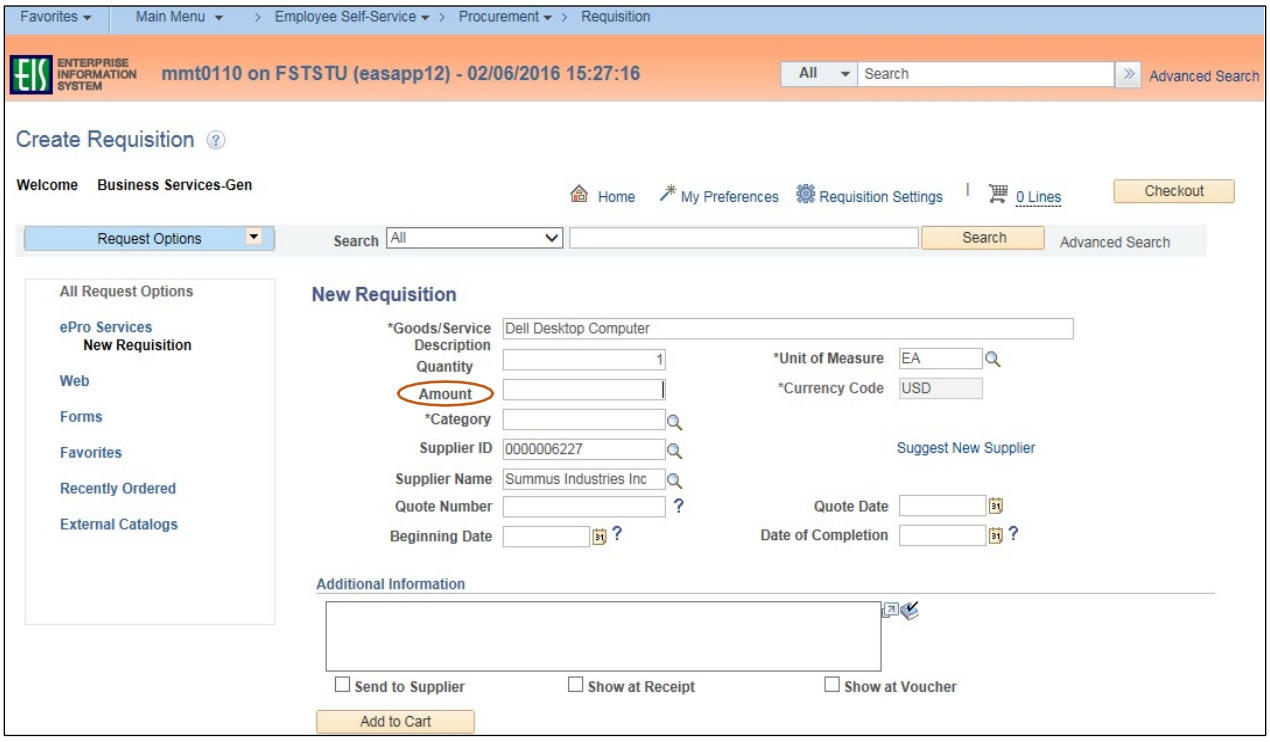
4. Click the magnifying glass next to the **Unit of Measure** field.
Note: **Unit of Measure** can be typed directly in the field without using the lookup feature.



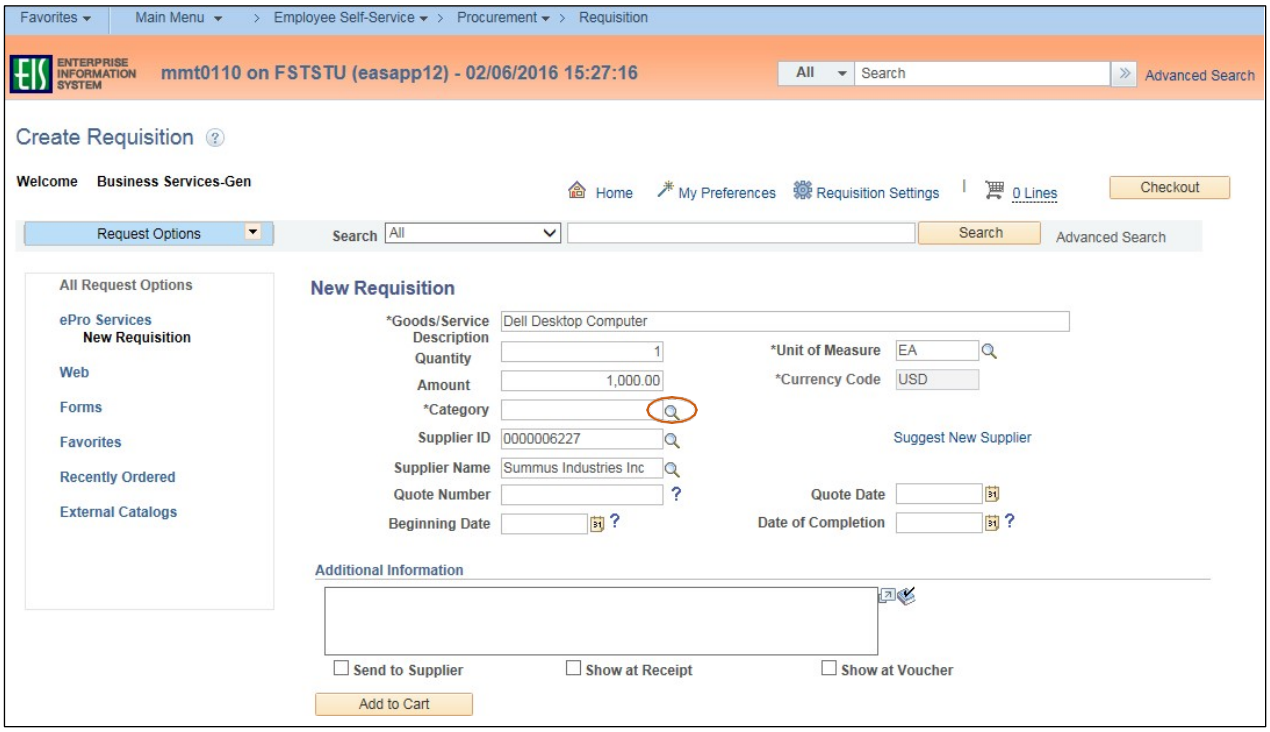
5. Select the appropriate **Unit of Measure** from **Look Up Unit of Measure** dropdown.



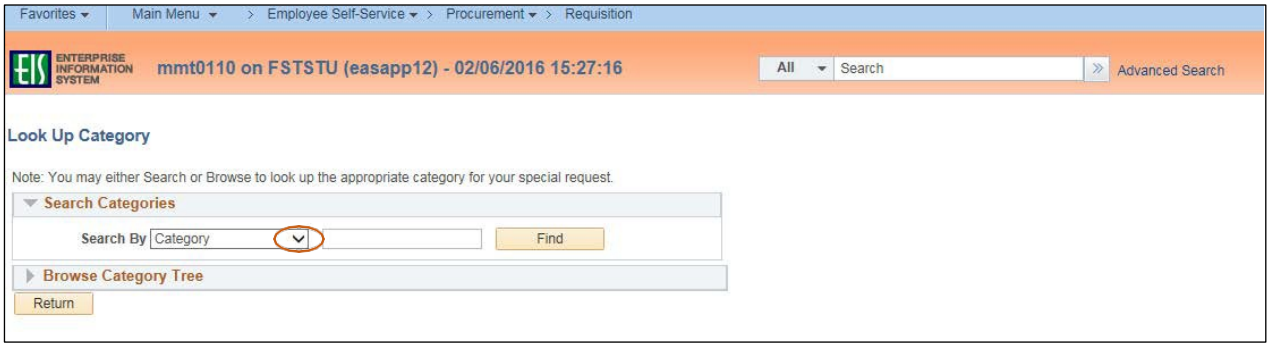
6. Enter the bid or quote amount received from the vendor in the **Amount** field.



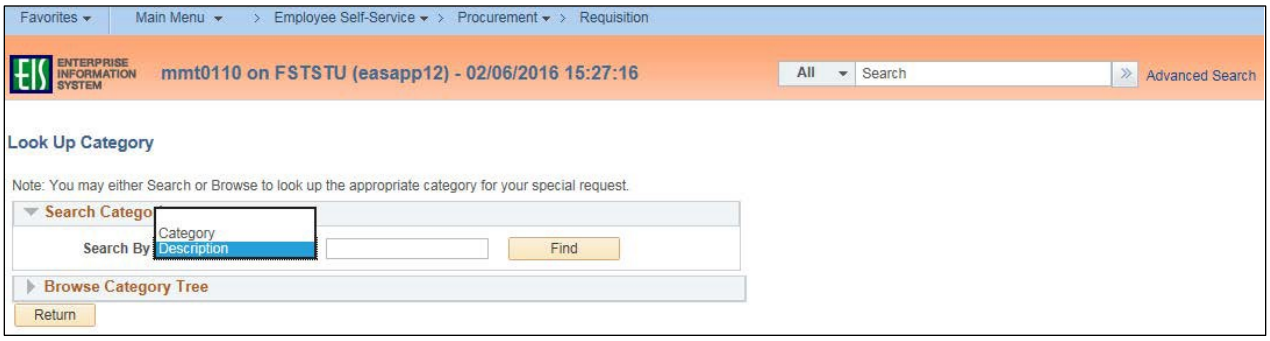
7. Click on the magnifying glass next to the **Category** field.



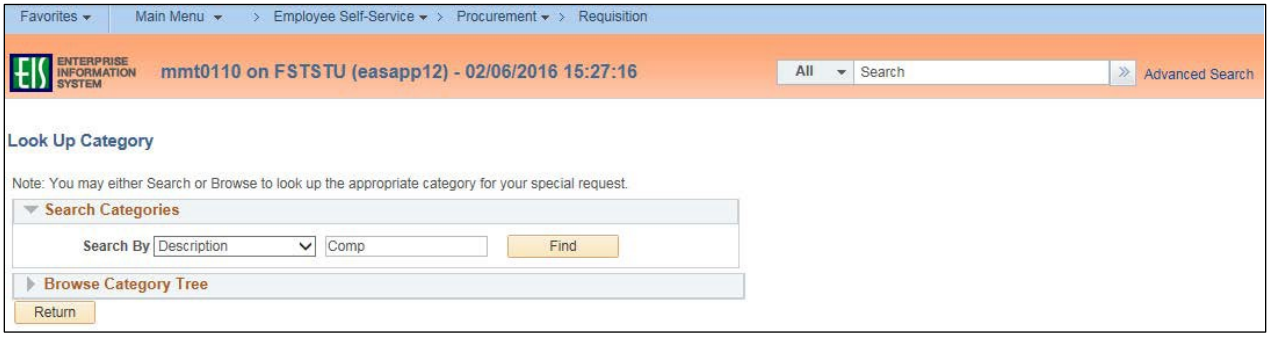
8. Click on the dropdown arrow next to **Category** to open **Search By** options.



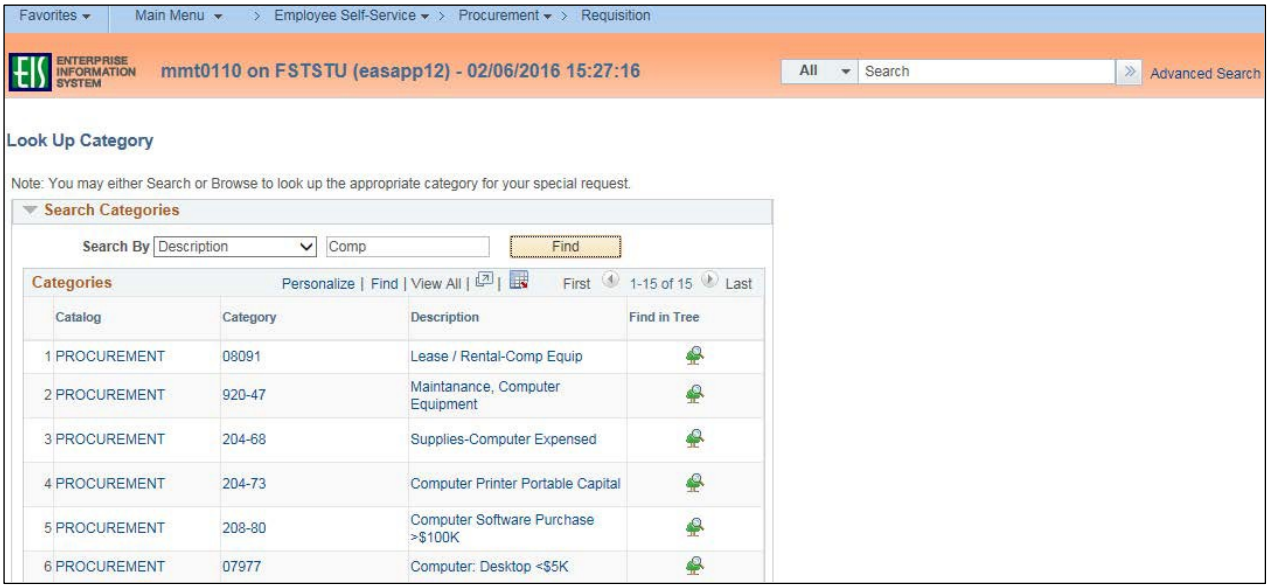
9. Select **Description** from the **Search By** dropdown menu.
10. Type a word to search in the empty field next to **Description**.
    Note: A partial word can be used. Do not use multiple words. If no word is entered, the entire **Category** or **Description** list will be available to view in the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



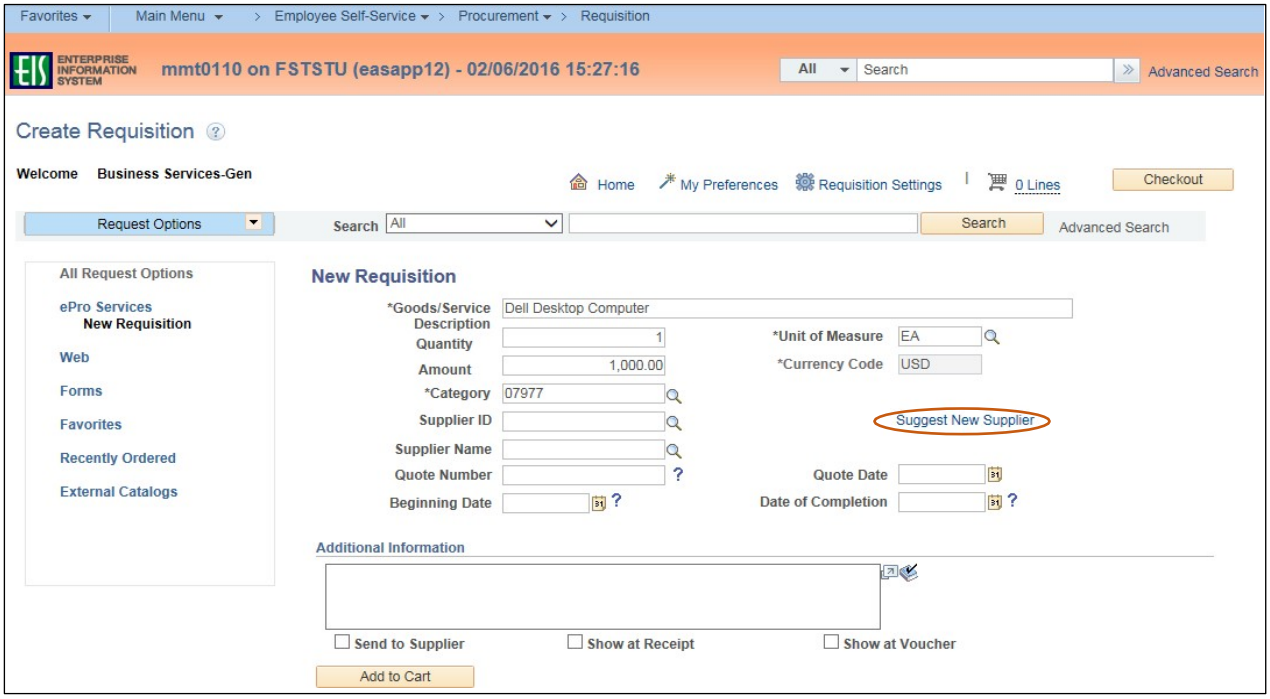
11. Click **Find**.



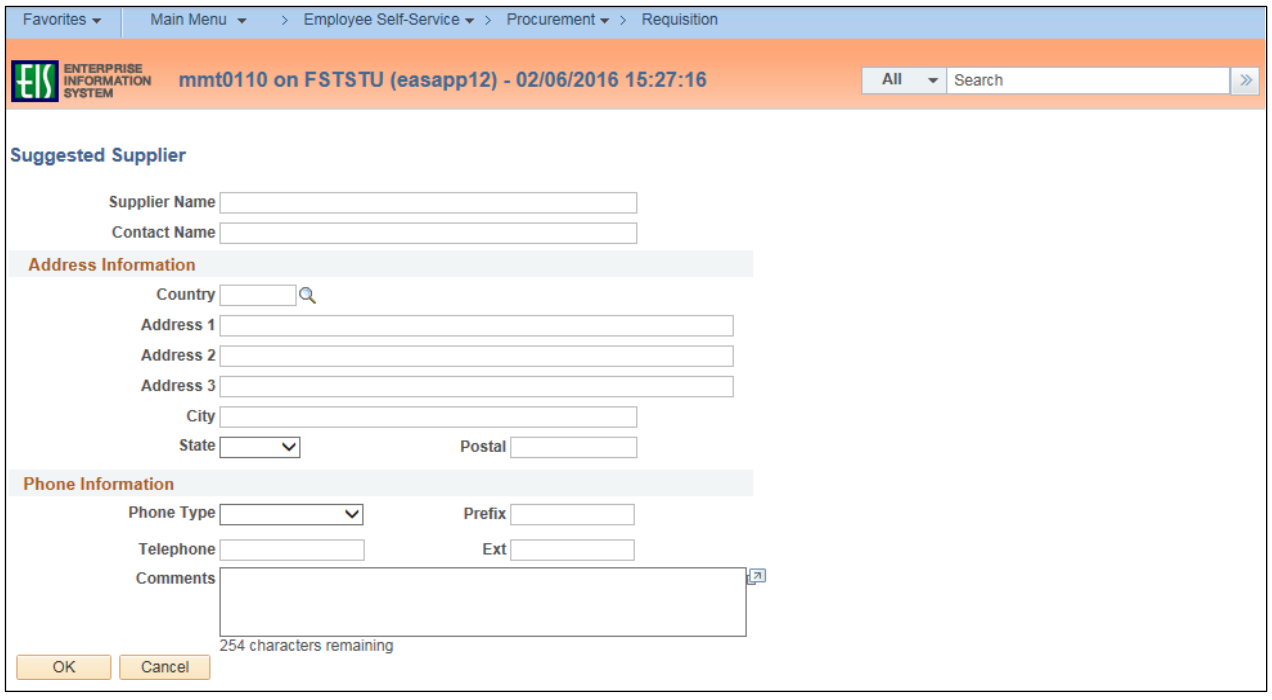
12. Click on the appropriate **Category** based on the **Description** field.
    Note: Select the category code that best describes the purchase. Accuracy is important as **Category** drives **Account** and **Alt Acct** expenditure codes. Choosing the correct **Category** also allows special approvers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



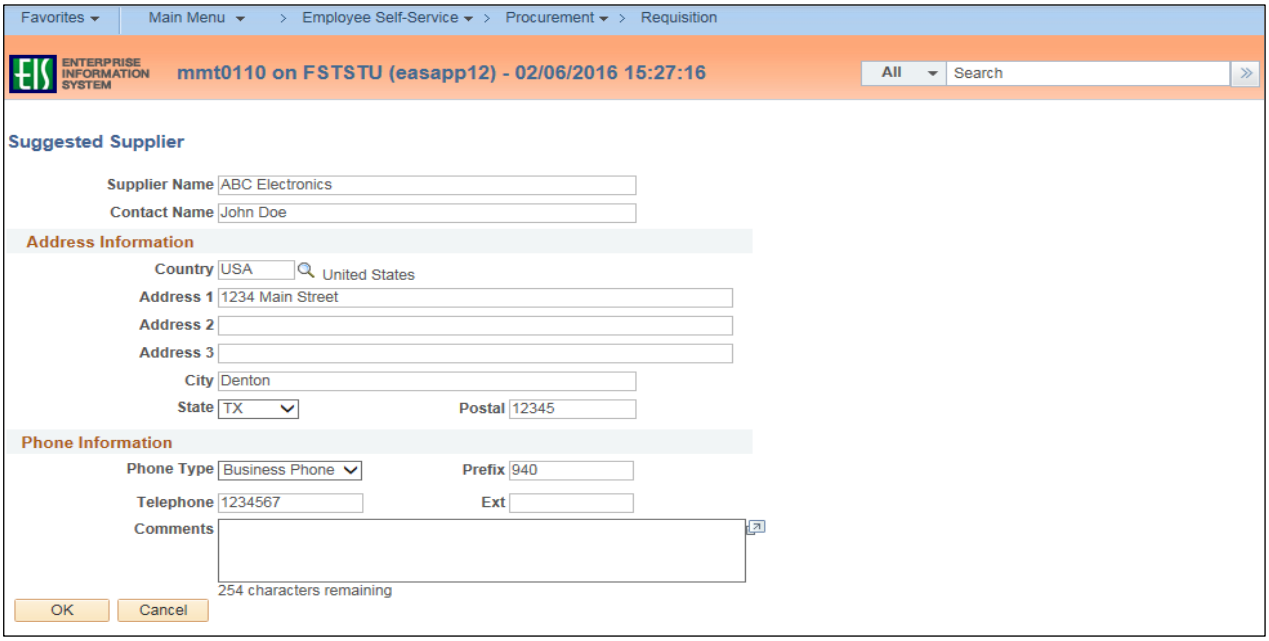
13. Click on **Suggest New Supplier** if **Supplier ID** and **Supplier Name** are not completed.
Note: Skip to step 16 if a **Suggested Supplier** is not needed.



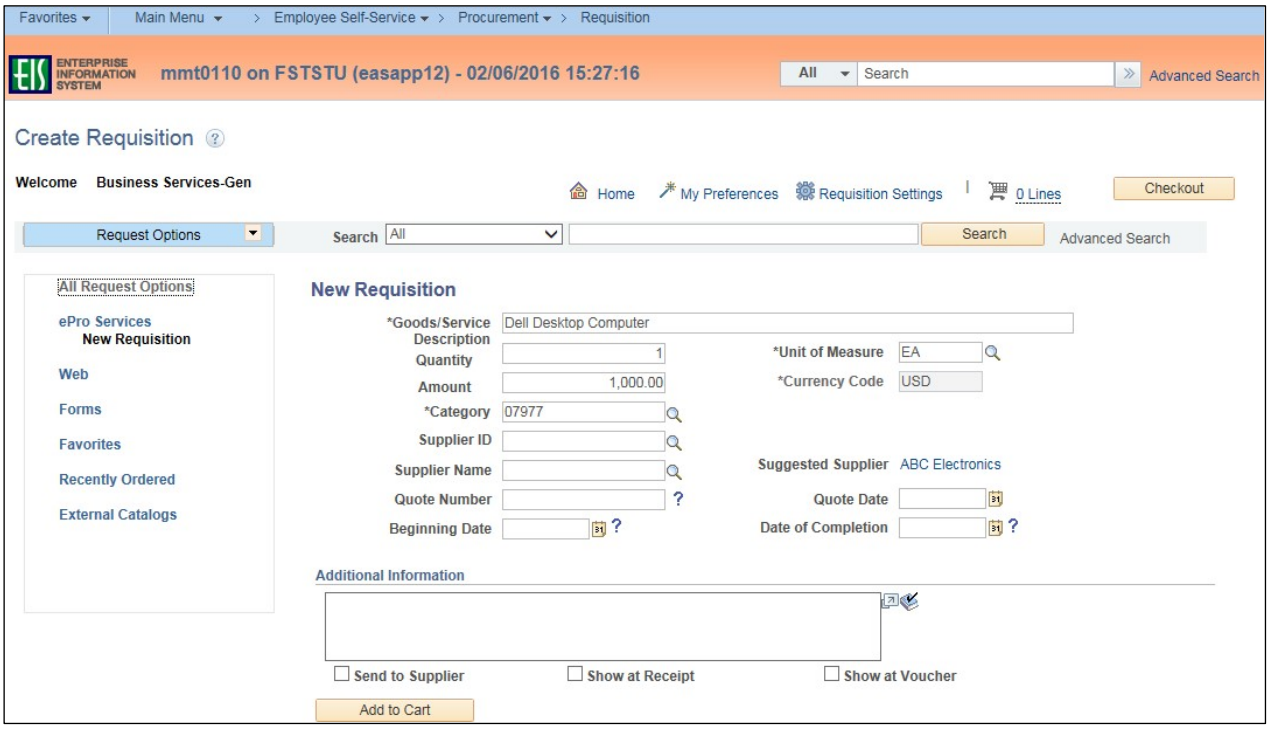
14. Enter **Supplier Name**, **Contact Name**, **Address Information**, **Full Phone Number** and **Comments** on the **Suggested Supplier** screen.
Note: Complete all fields indicated above, as you will be unable to return to edit or add Suggested Supplier information after clicking **OK**. In addition,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



15. Click **OK**.

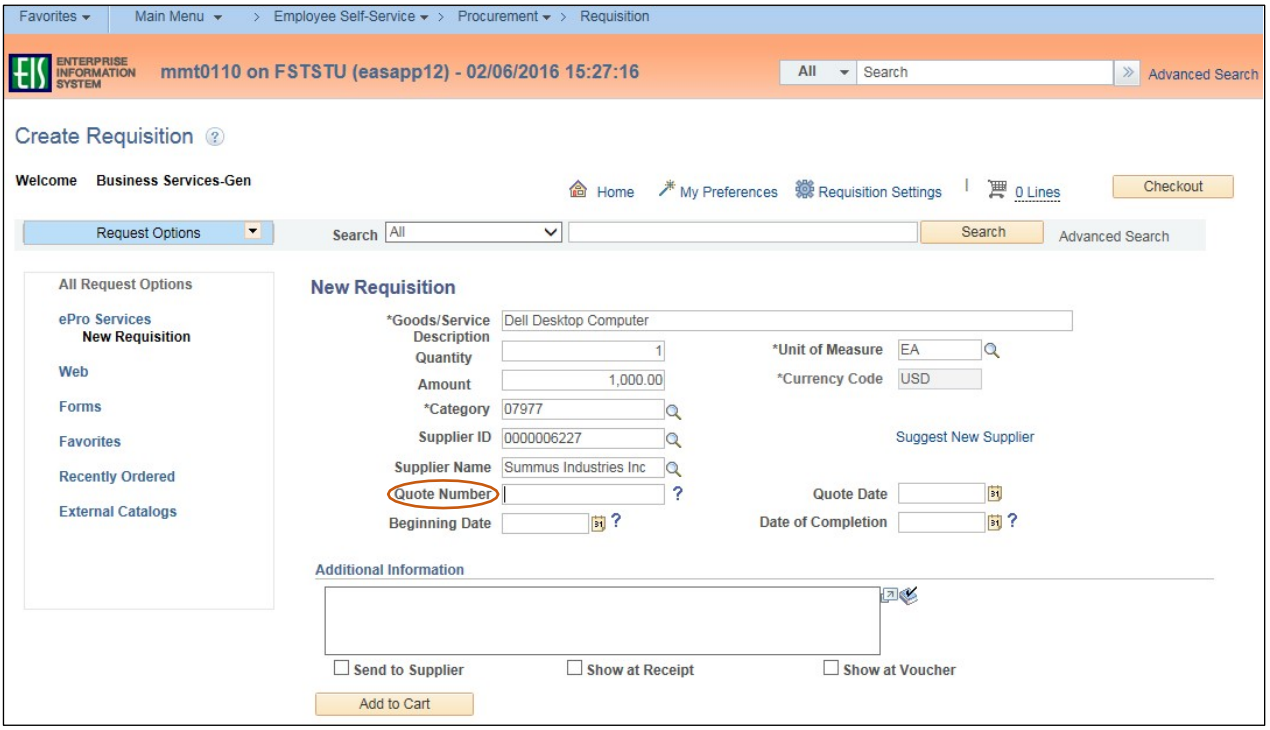


Note: The **Create Requisition** screen will be updated with the **Suggested Supplier** noted. The **Supplier ID** and **Supplier Name** will continue to be blank.

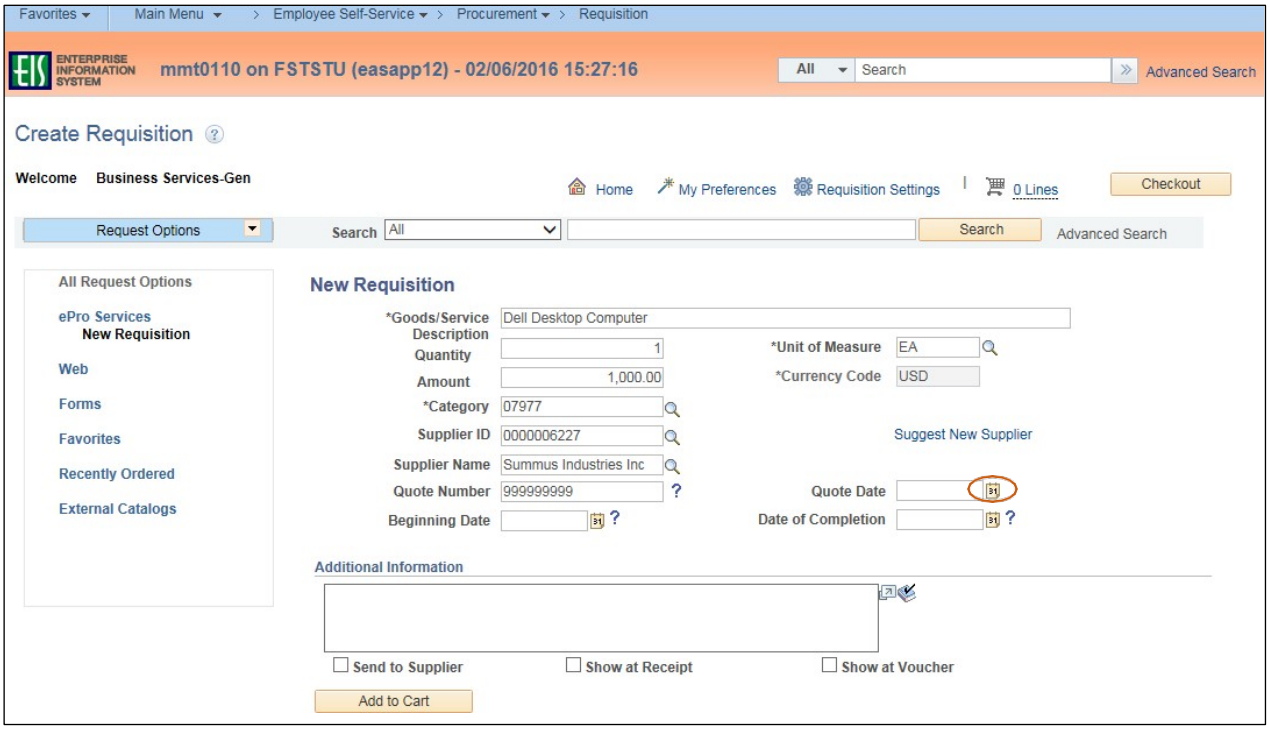


16. Enter **Quote Number**.

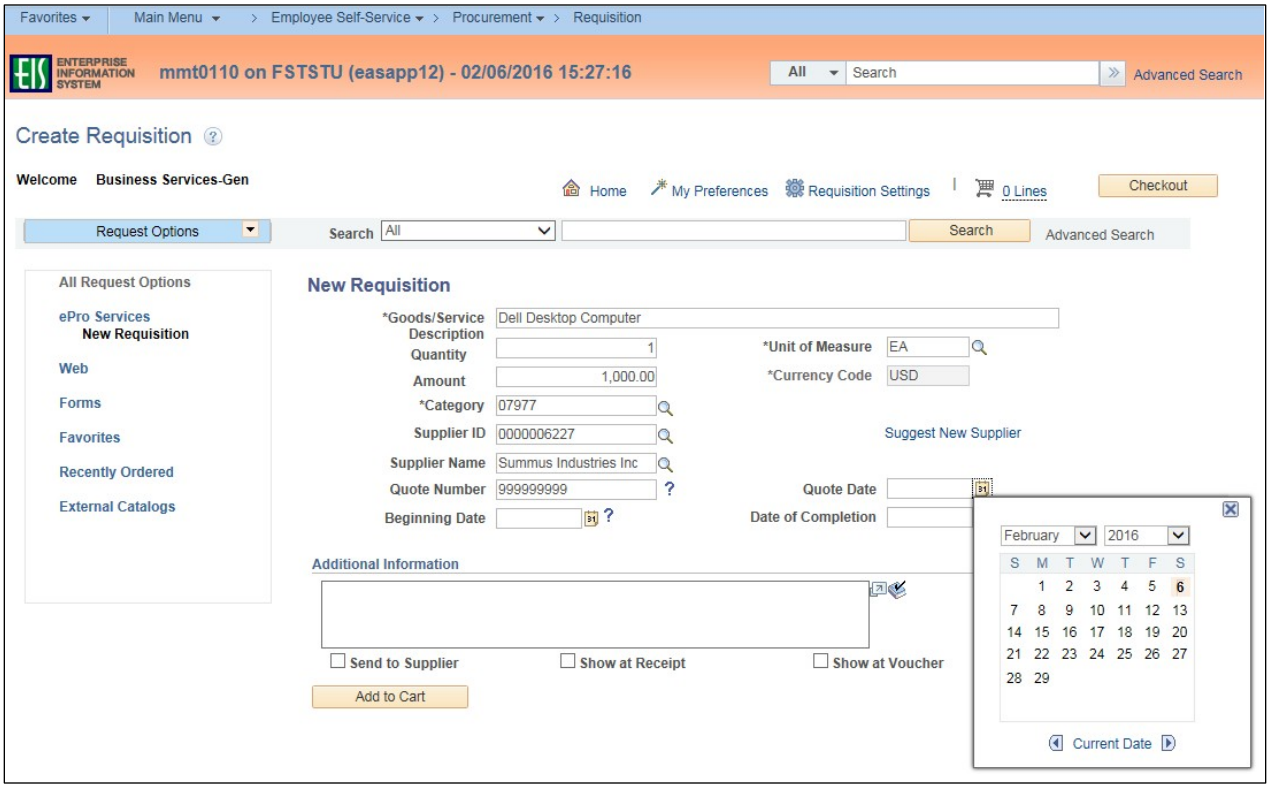
Note: If a quote number is not available and the quote is from a website, provide site address. If quote received via phone, fax or email, provide the name of person who provided quote.



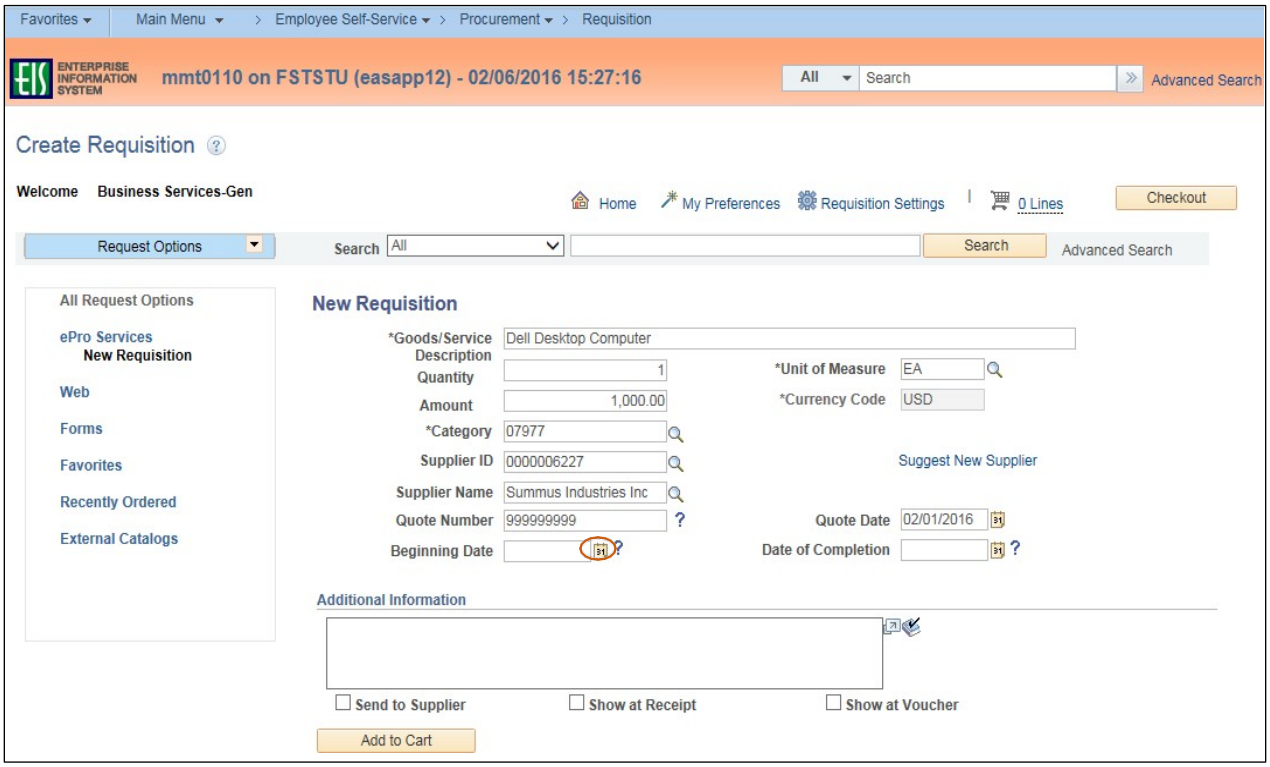
17. Enter **Quote Date** by clicking on calendar icon.



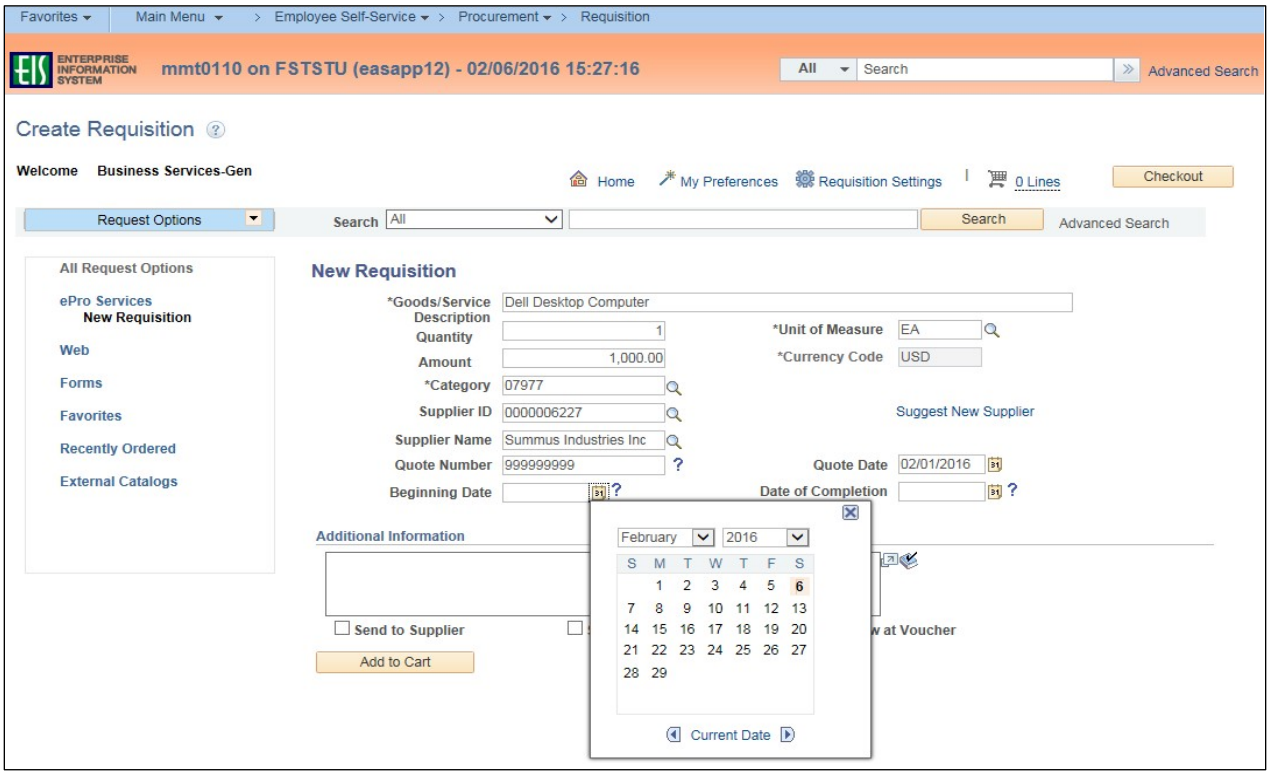
18. Select the date the quote was received.



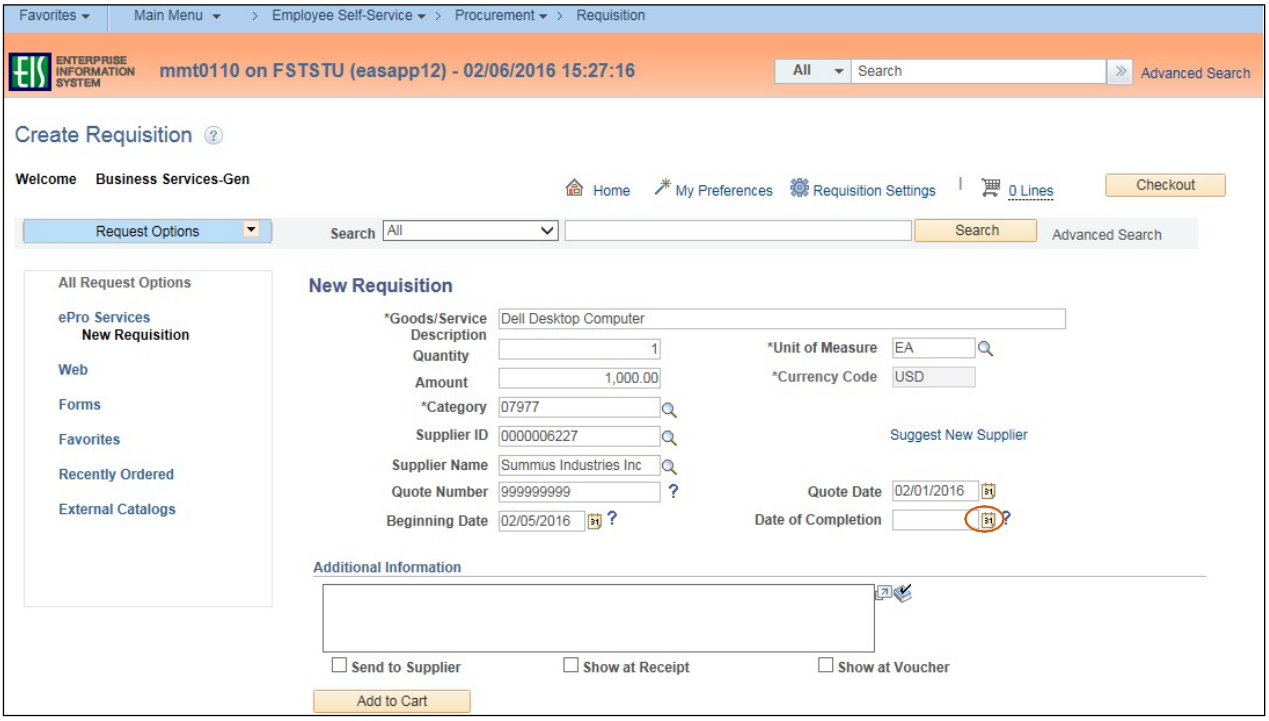
19. Enter **Beginning Date** by clicking on calendar icon.



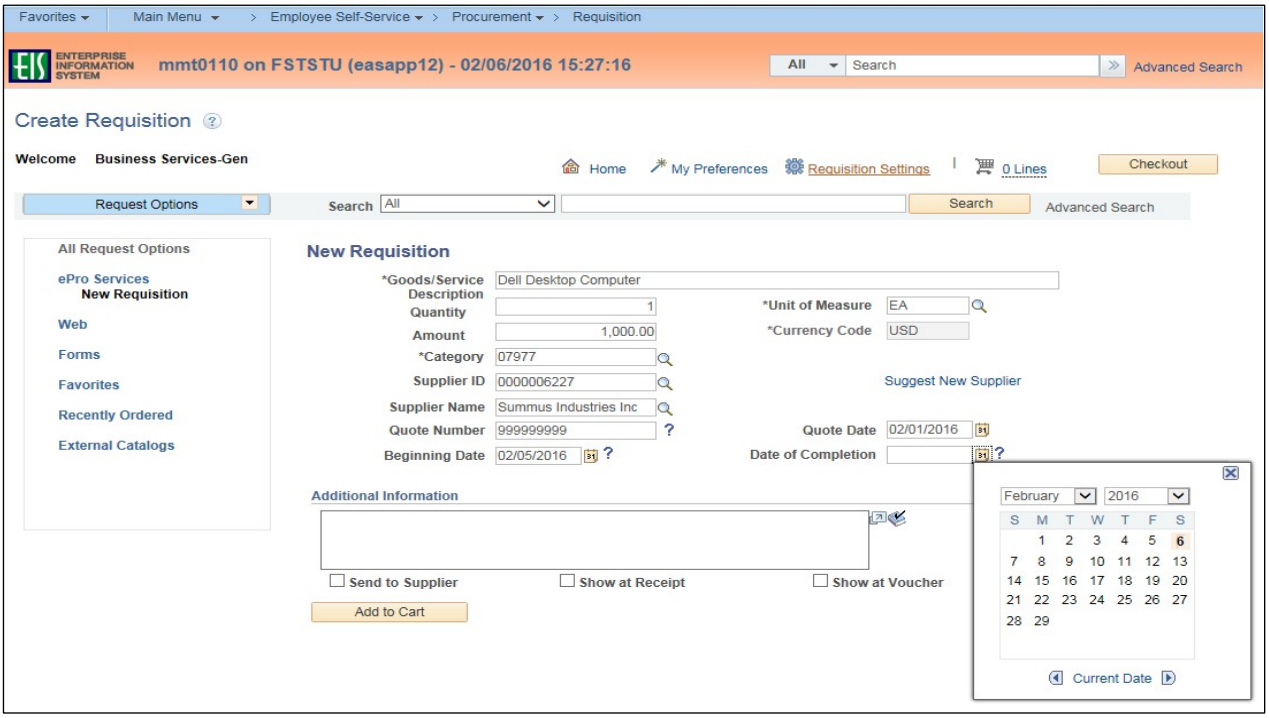
20. Select the appropriate date based on whether ordering Goods or Services.
Note: For Goods, select the date the quote will expire. For Services, select the date when the service is to begin.



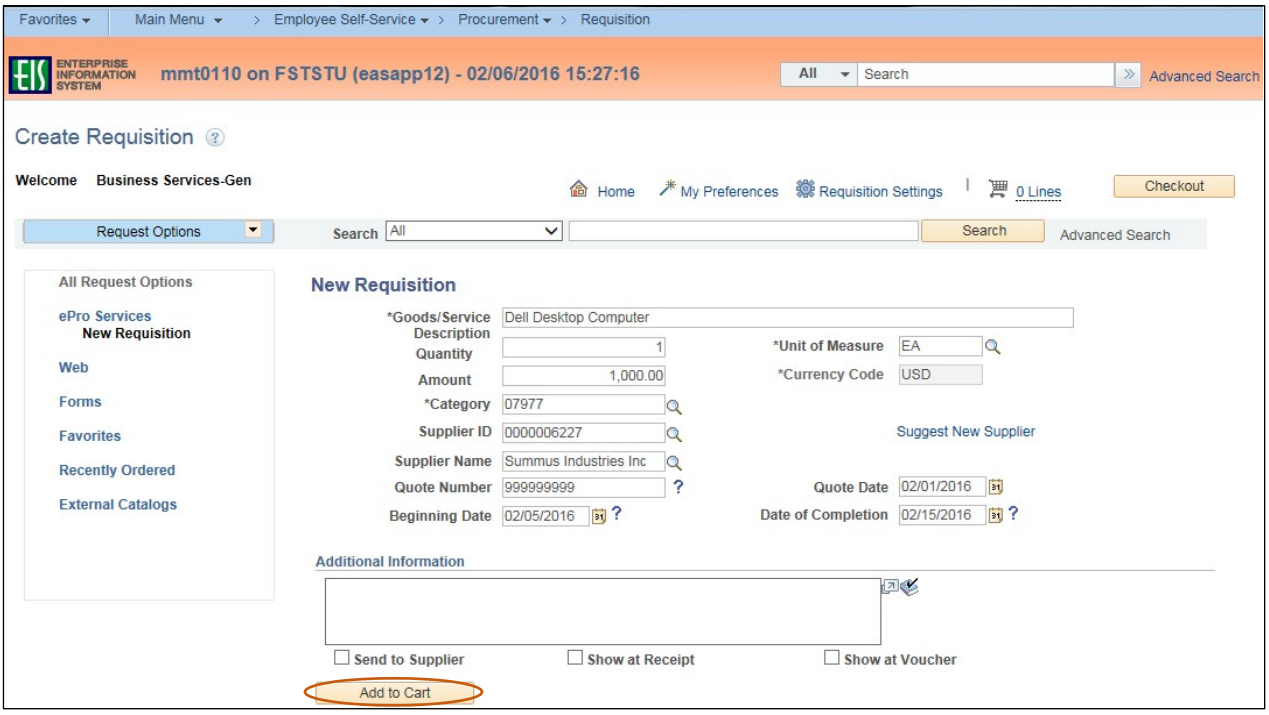
21. Enter the **Date of Completion** by clicking on the calendar icon.



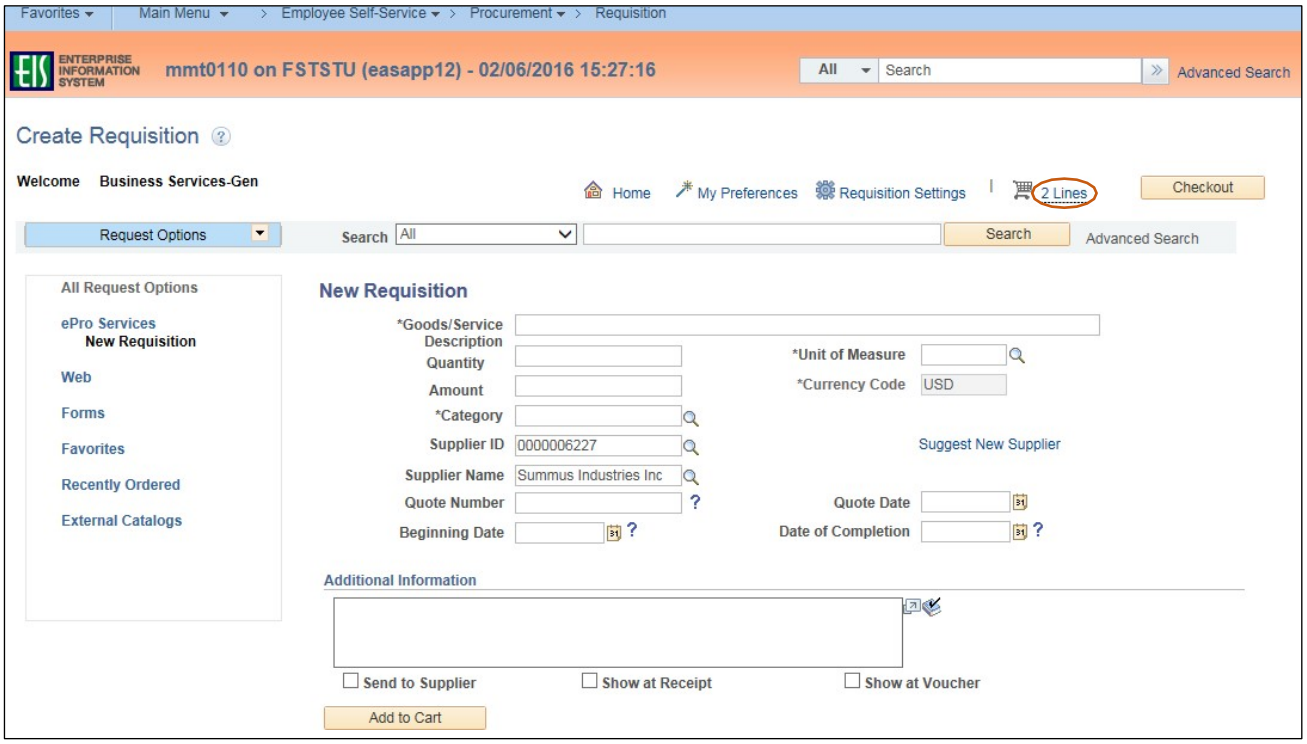
22. Select the appropriate date based on whether ordering Goods or Services.
    Note: For Goods, select the 'deliver by' date. For Services, select the date when the task should be completed. Normal business practice allows a 30 day turnaround for vendors.



23. Type any necessary information in the **Additional Information** field.
24. Click **Add to Cart**.
    Note: 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.



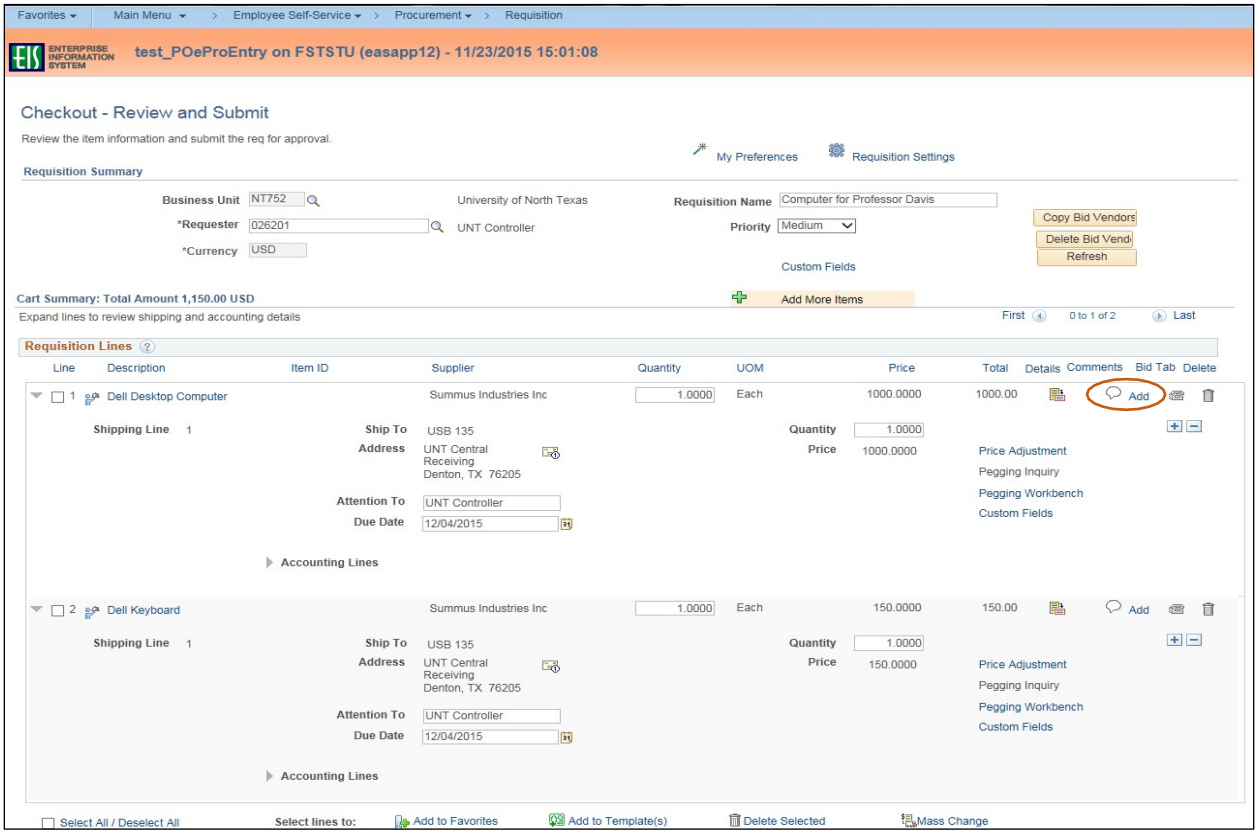
25. Repeat steps 2-12 and 16-24 for each item to be purchased from this **Supplier**.
    Note: You must repeat steps 13-15 for each item to be purchased from the **Suggested Supplier**. Create a new Requisition if a different supplier is to be used. Number of lines in the order will be visible beside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



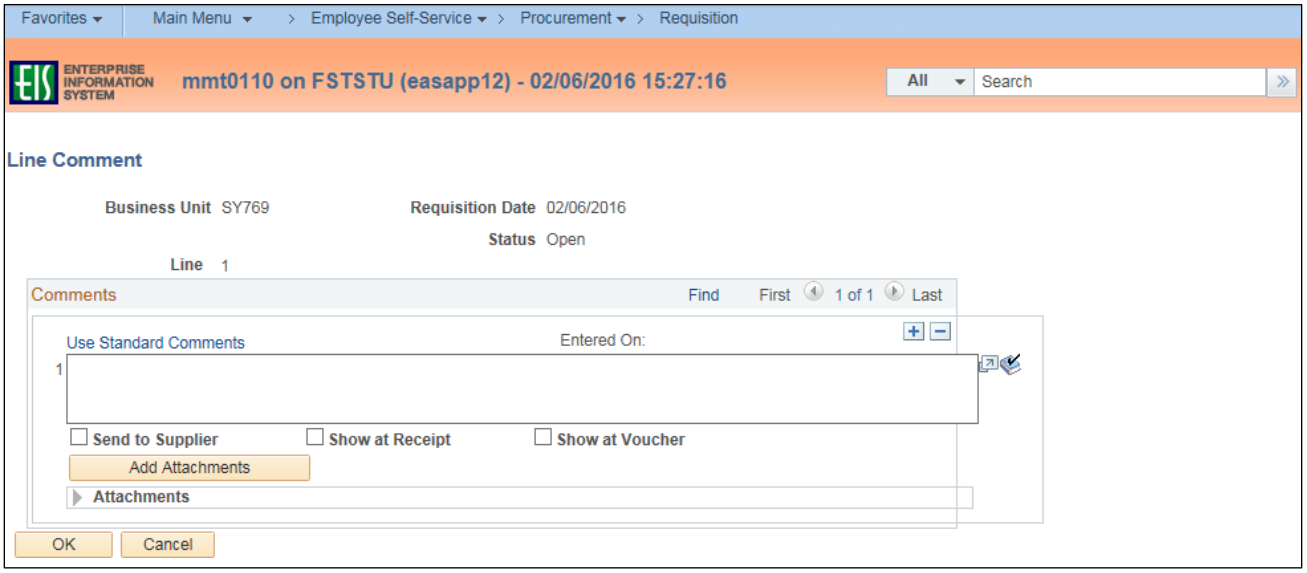
Reviewing Requisition Details

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

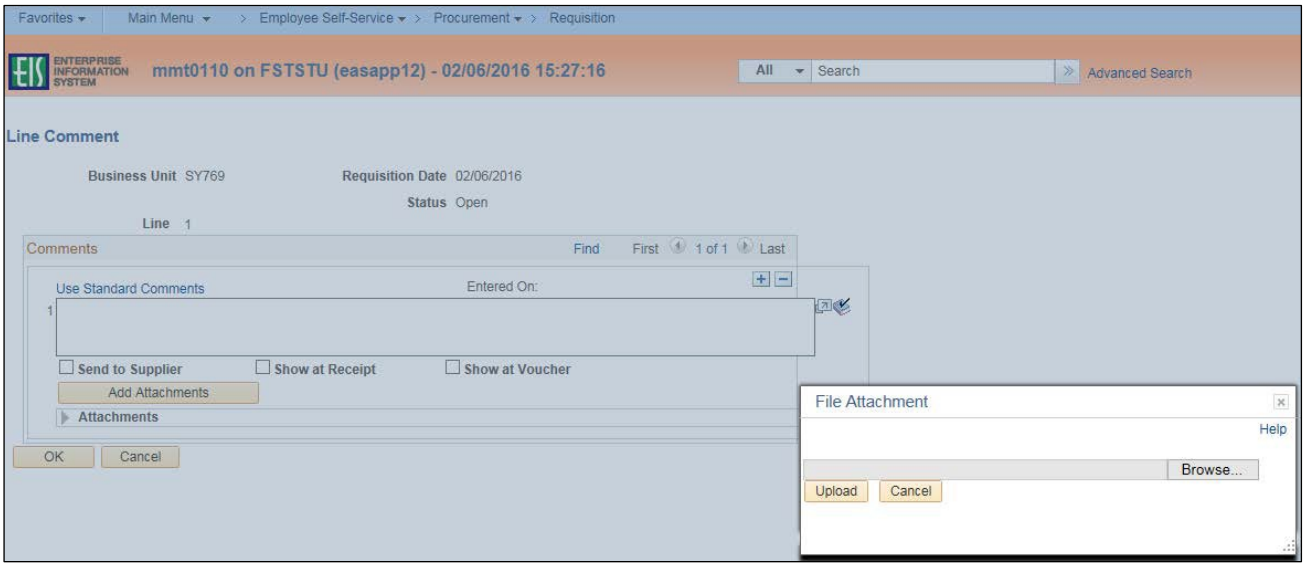
1. Review the **Requisition Line** items on the **Checkout – Review and Submit** screen to ensure the information is correct and complete.
   Note: Click on **Add More Items** if additional line items need to be added. This will return you back to step 2 of **Creating a Requisition**.
2. Click the **Comment**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



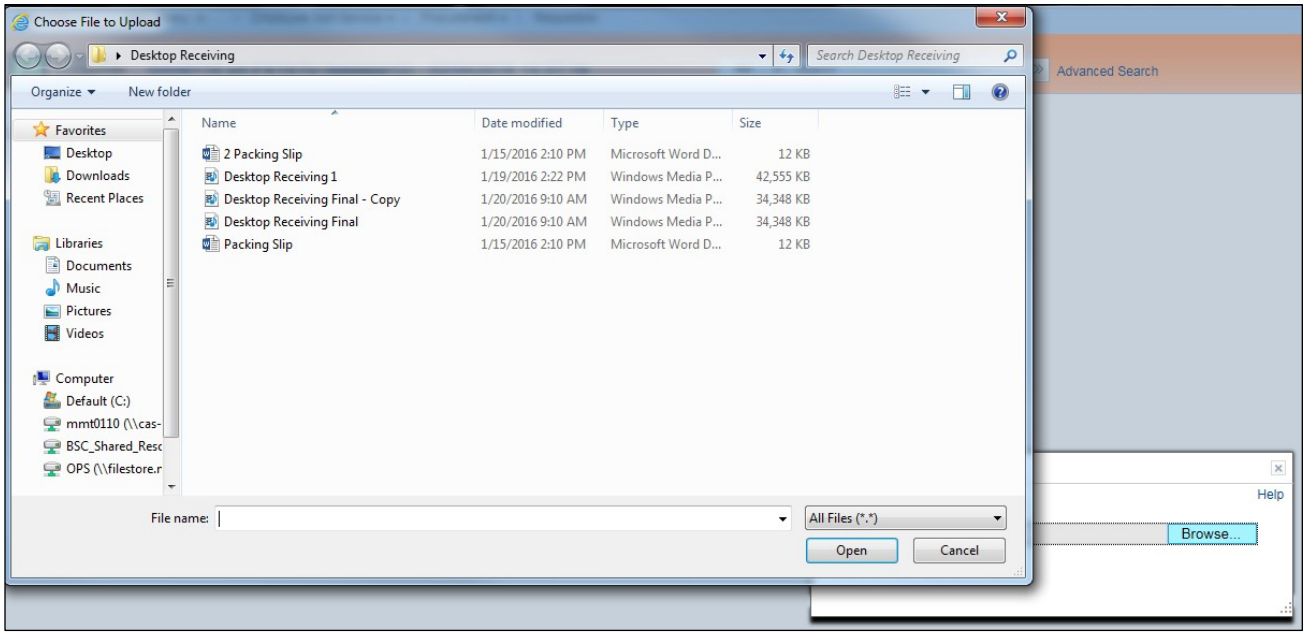
3. Enter comment in the **Comments** field within the **Line Comment** section.
   Note: Line comment is specific to the line item and is different from the **Requisition Comment** on the **Checkout – Review and Submit** screen. If you need to send the information you typed in the **Comments** field to the Supplier, Receipt, or Voucher, check the appropriate box below the **Comments** field.
4. Click **Add Attachments**.
   Note: Ensure all applicable documents are attached. Attach Supplier W-9 for **Suggested Suppliers**.



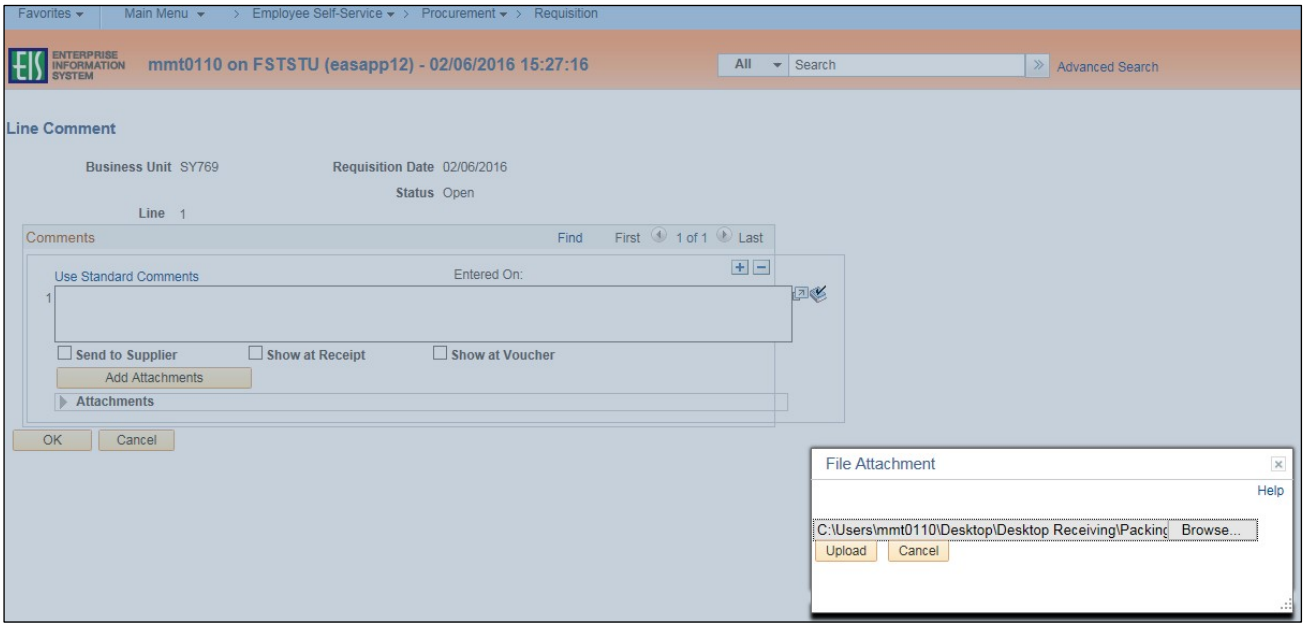
5. Click **Browse** in the **File Attachment** box.



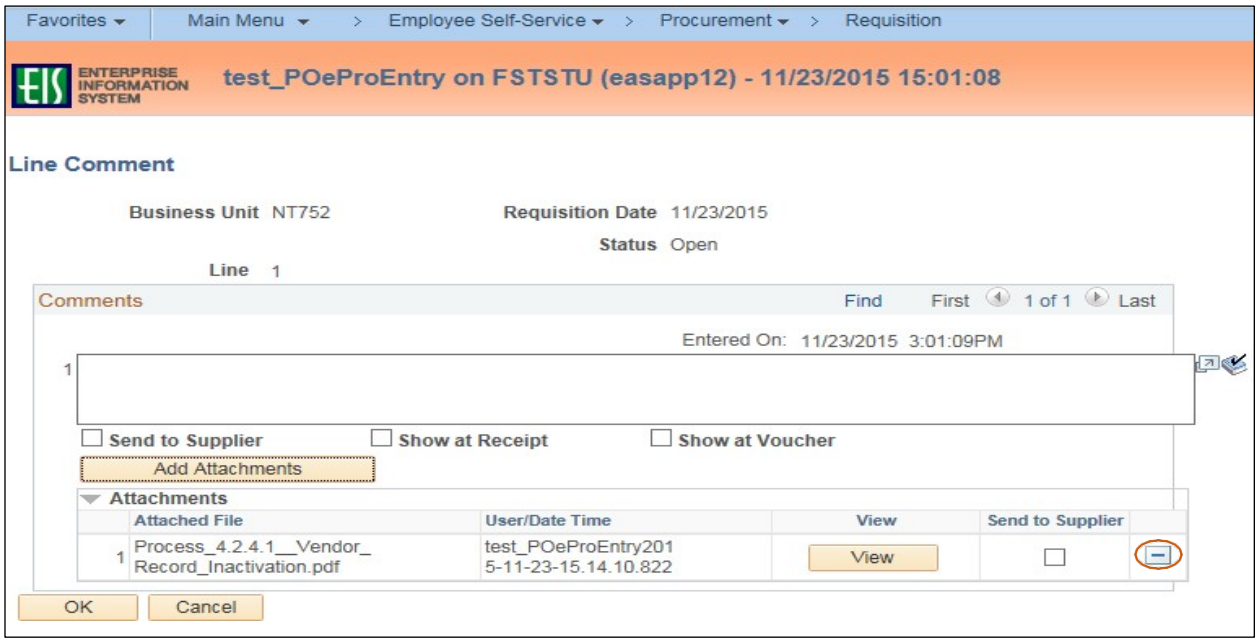
6. Select file to upload from browser window.
7. Click **Open**.



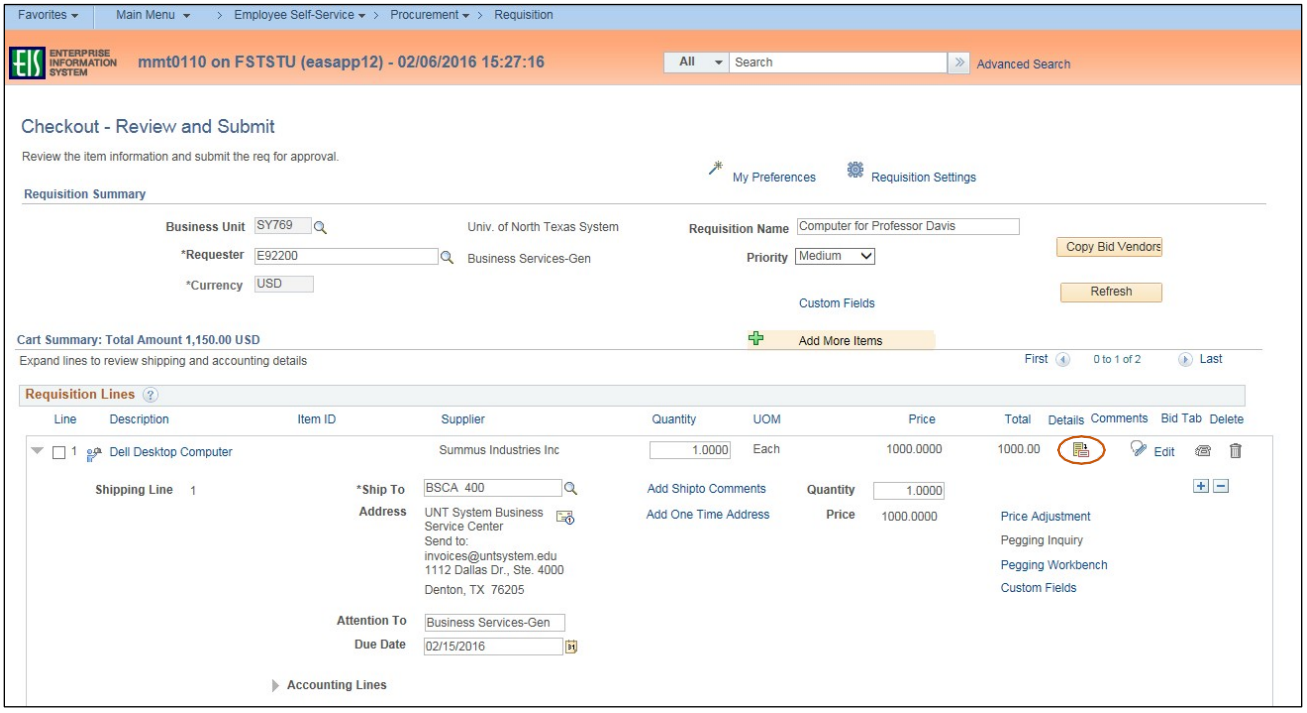
8. Click **Upload** in **File Attachment** box.



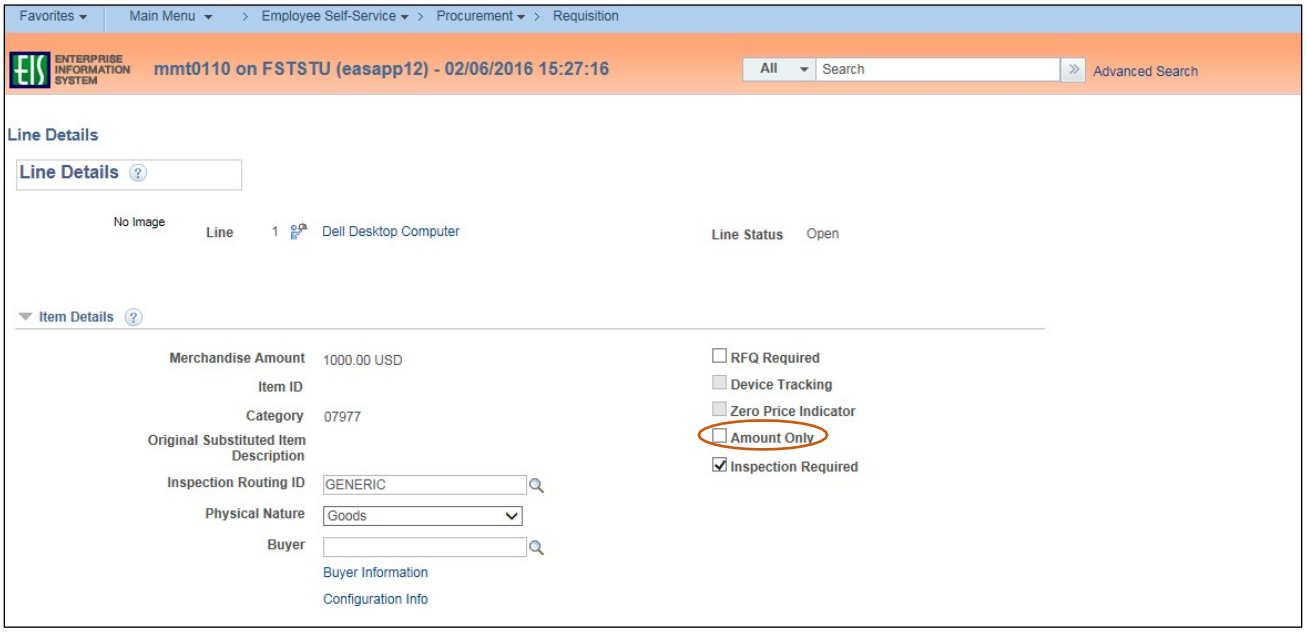
9. Confirm the file was uploaded by verifying the file is showing in the **Attachments** section.
10. Repeat steps 4-9 for each file that needs to be uploaded.
    Note: Attached files can be removed by the individual that attached them by clicking on the minus sign next to the attachment that needs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



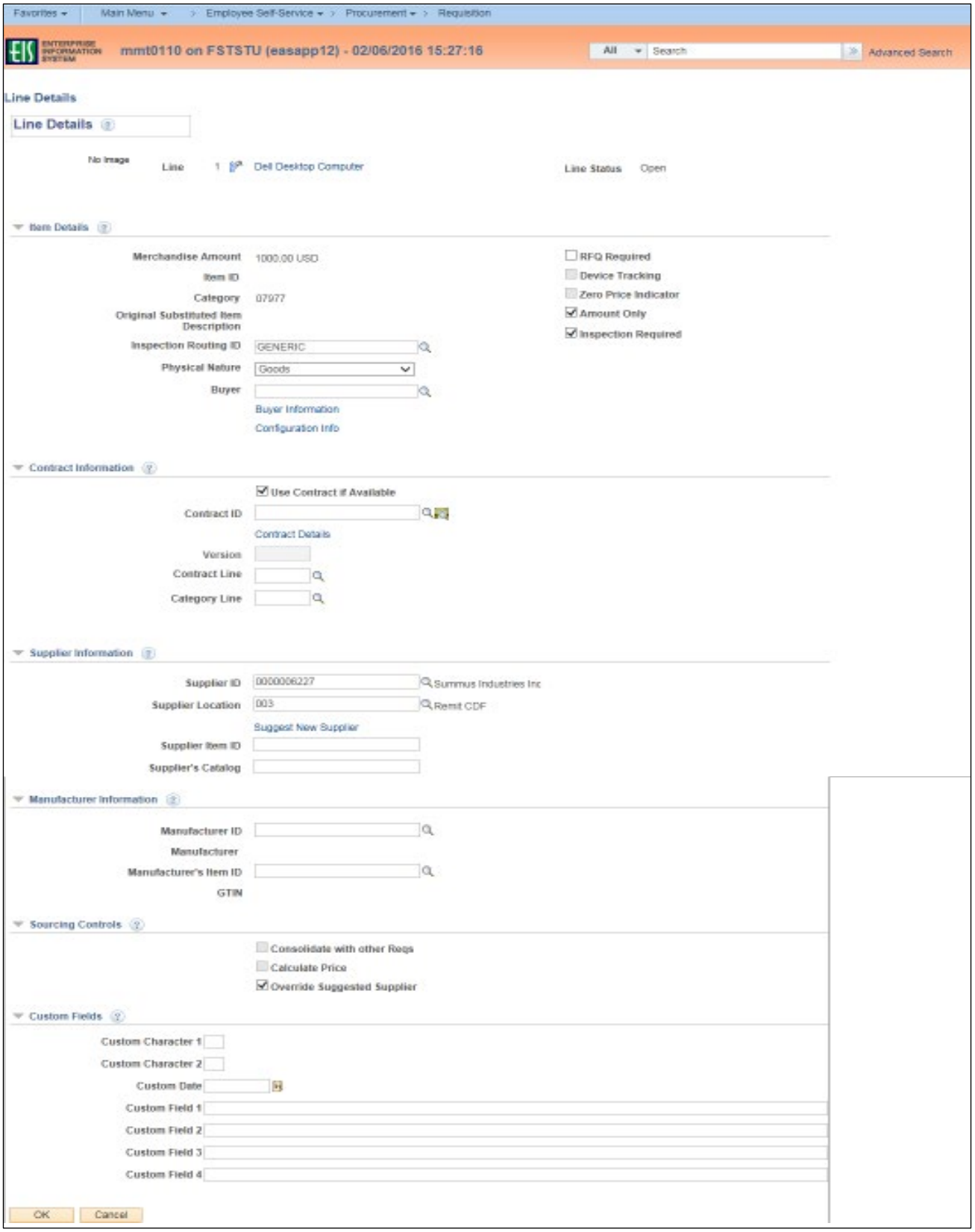
12. Click the line details icon when creating a requisition for a blanket order with a quantity of 1.
Note: If you are not creating a requisition for a blanket order, skip to step 15.



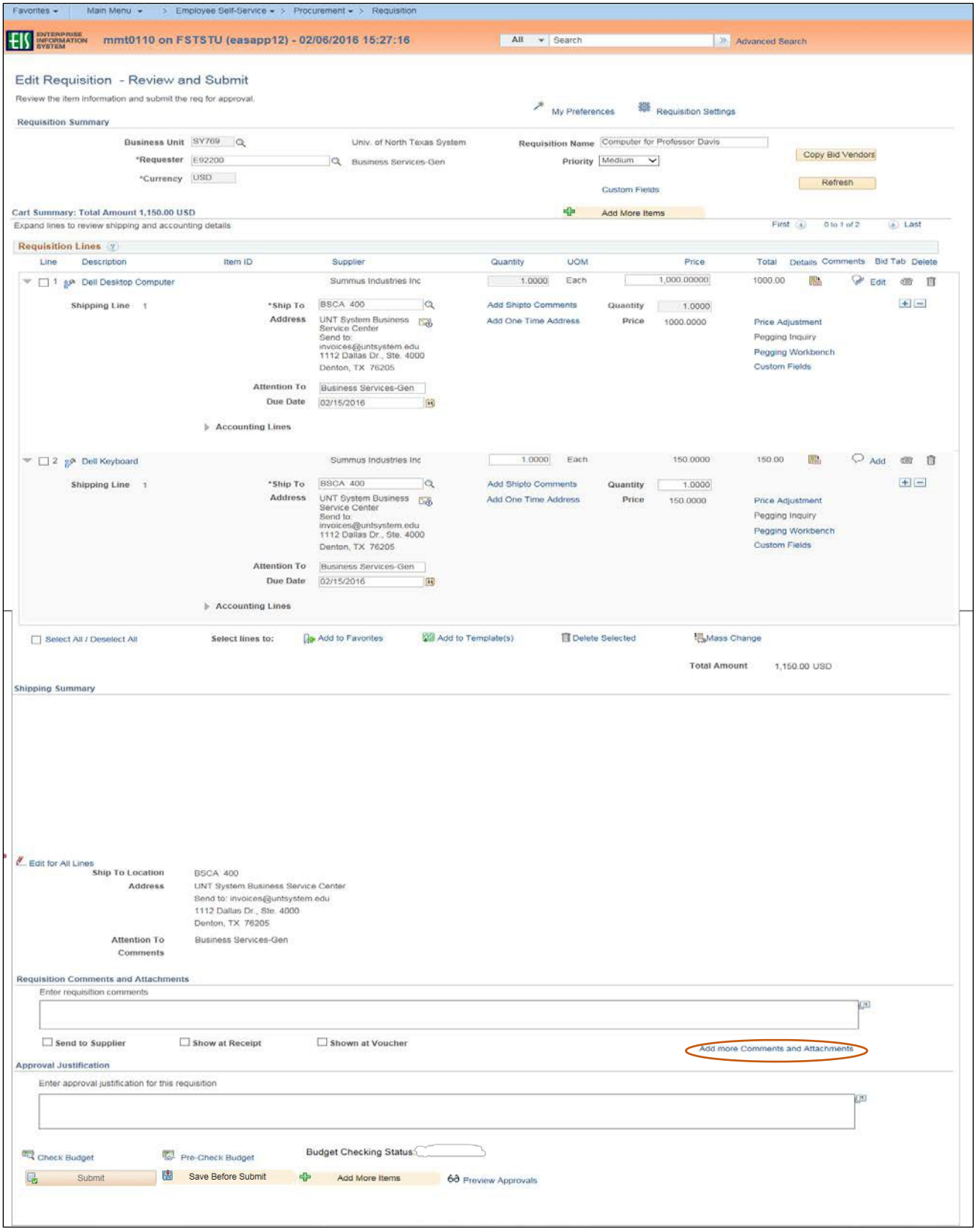
13. Select the box next to **Amount Only** on the **Line Details** screen.



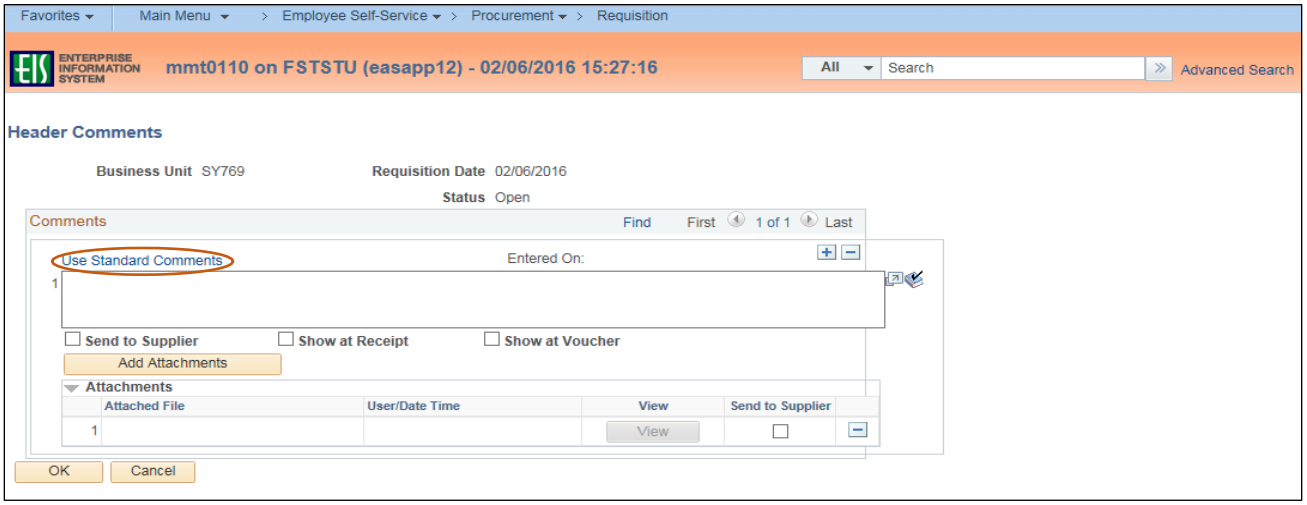
14. Click **OK** at the bottom of the screen.



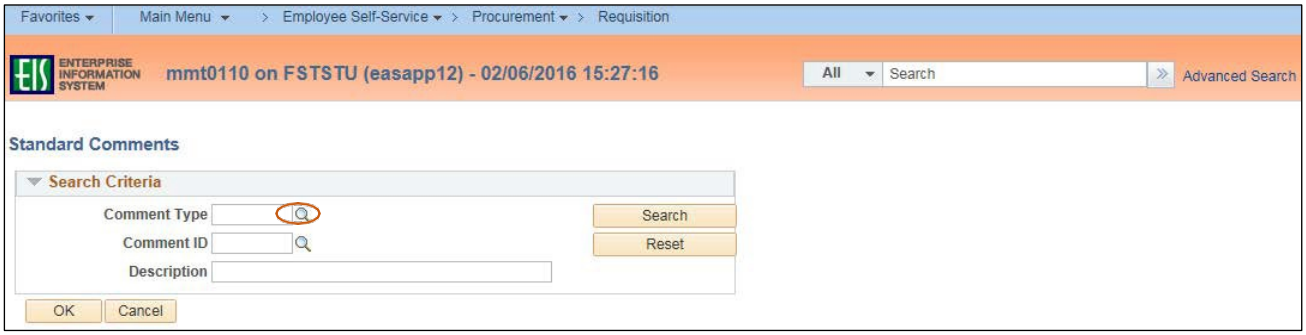
15. Scroll to the **Requisition Comments and Attachments** section at the bottom of the screen.
16. Click **Add more Comments and Attachments** to use the Standard Comments feature.



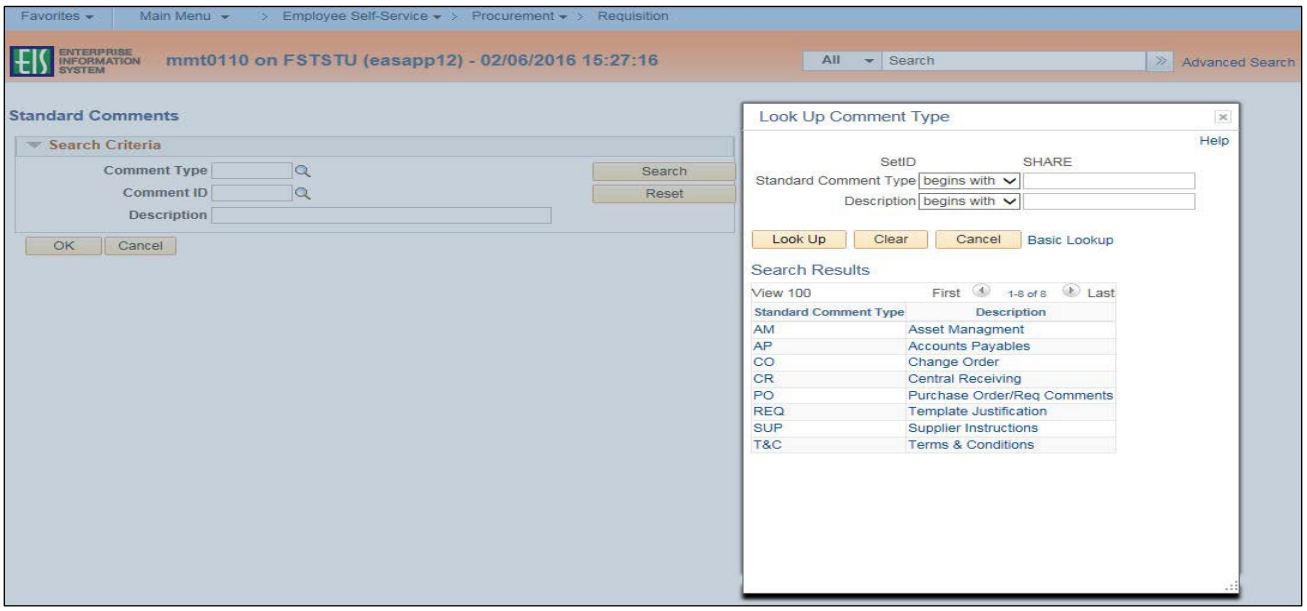
17. Click **Use Standard Comments**.



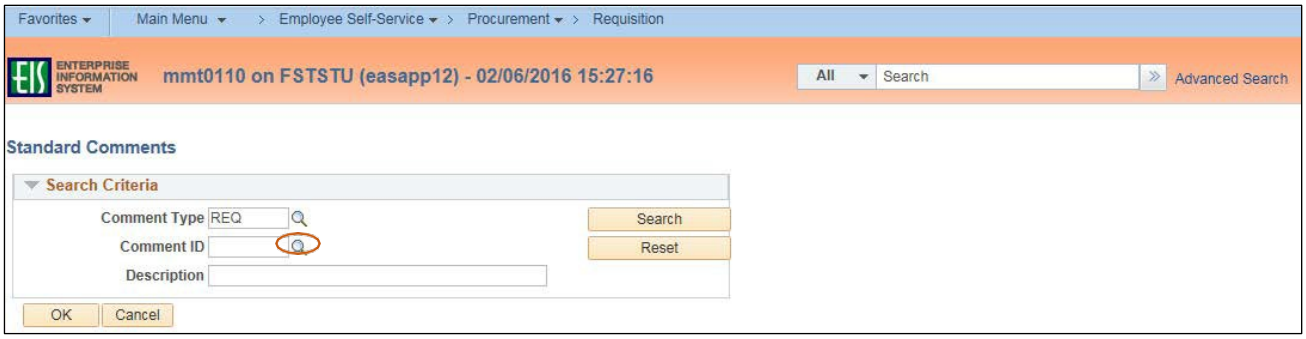
18. Click on the magnifying glass next to the **Comment Type** field.



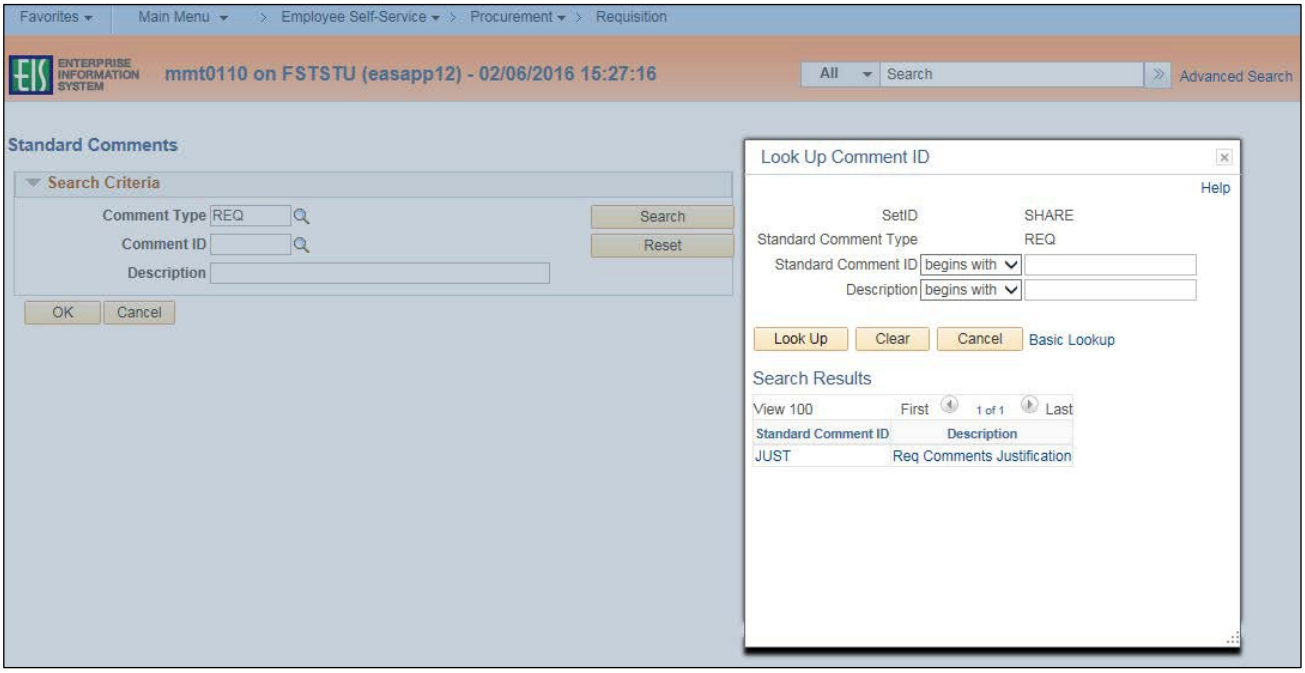
19. Select the appropriate **Standard Comment Type** from the **Look Up Comment Type** dropdown.



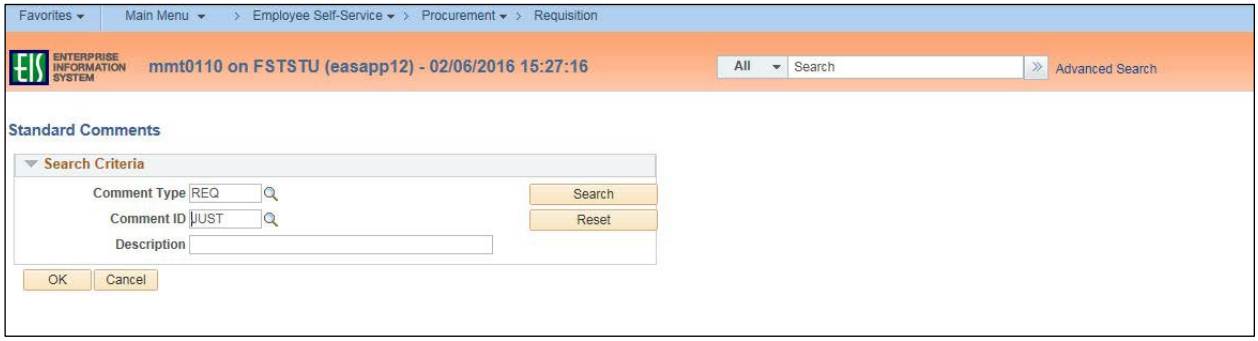
20. Click on the magnifying glass next to the **Comment ID** field.



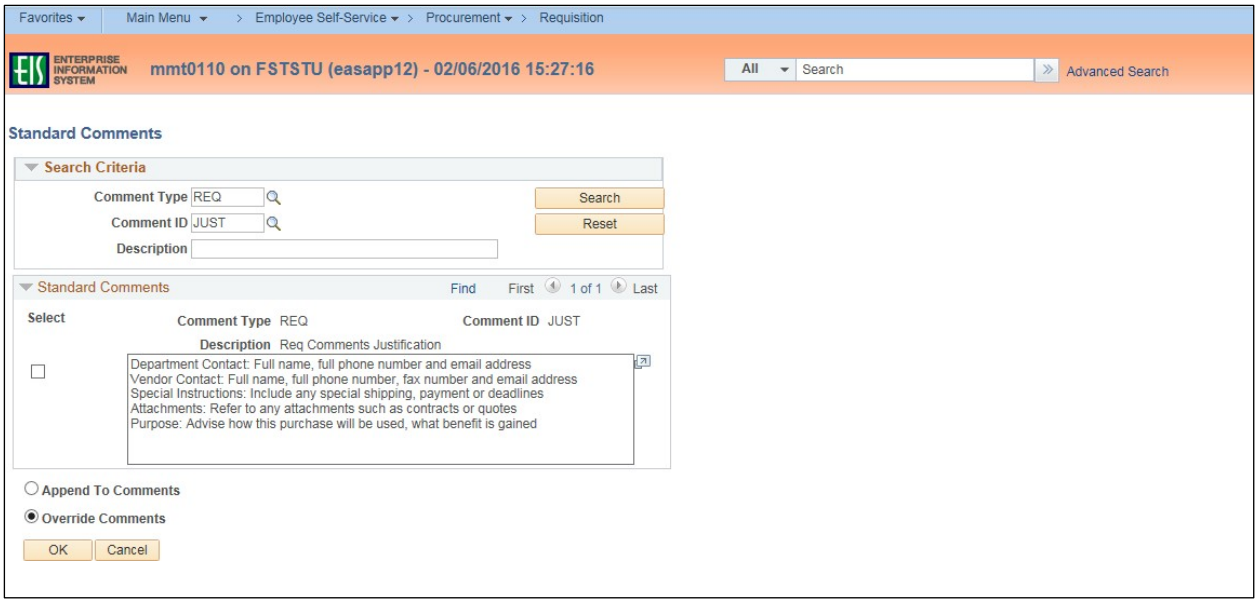
21. Select the appropriate **Standard Comment ID** from the **Look Up Comment ID** dropdown.



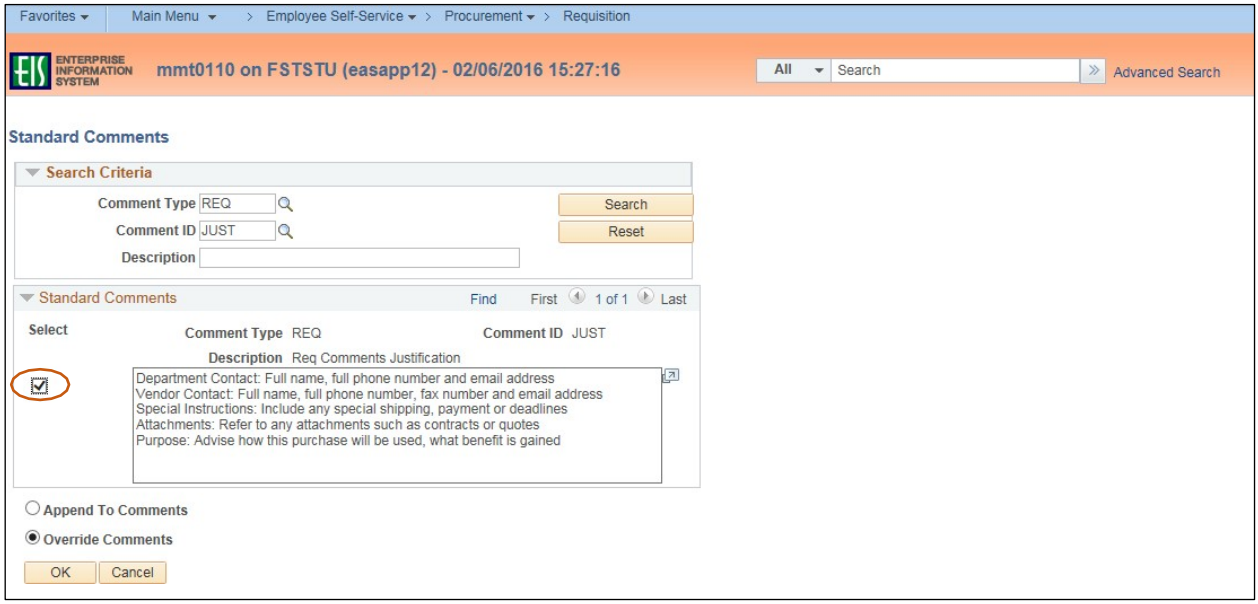
22. Click **OK**.



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



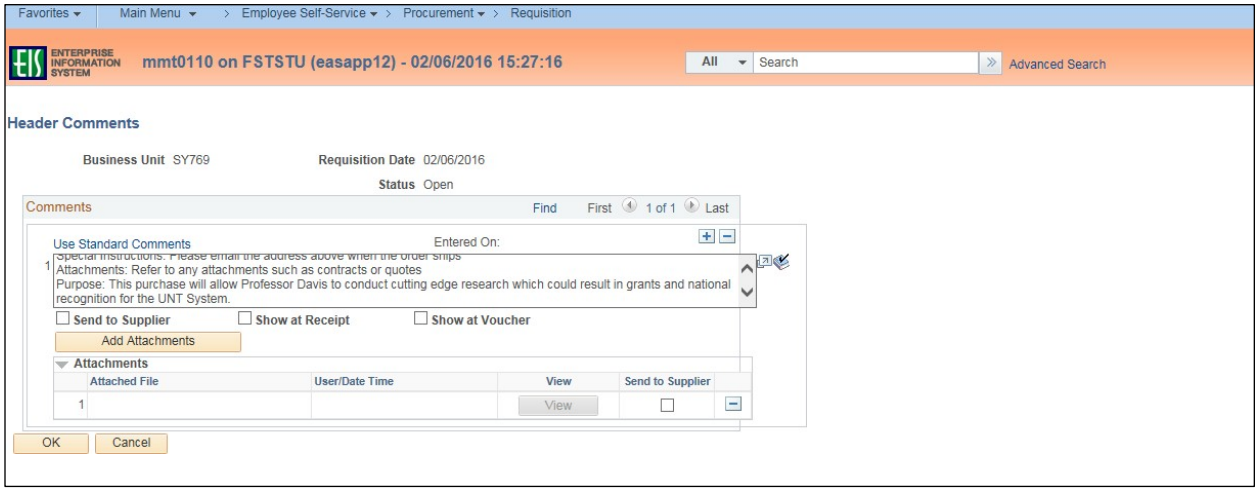
23. Click the box next to the appropriate standard comment option to make your selection.
24. Click **OK**.



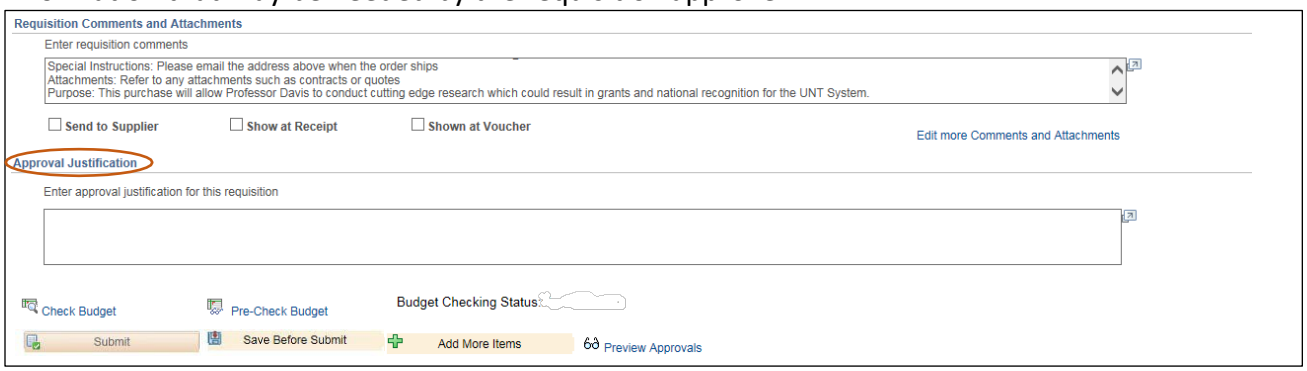
25. Recall the CAP-IT guidelines when providing detailed information in the **Standard Comments** box, which is now populated with helpful comment prompts.
Note: The items listed in the table below require additional information be provided in the **Requisition Comments and Attachments** section of the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

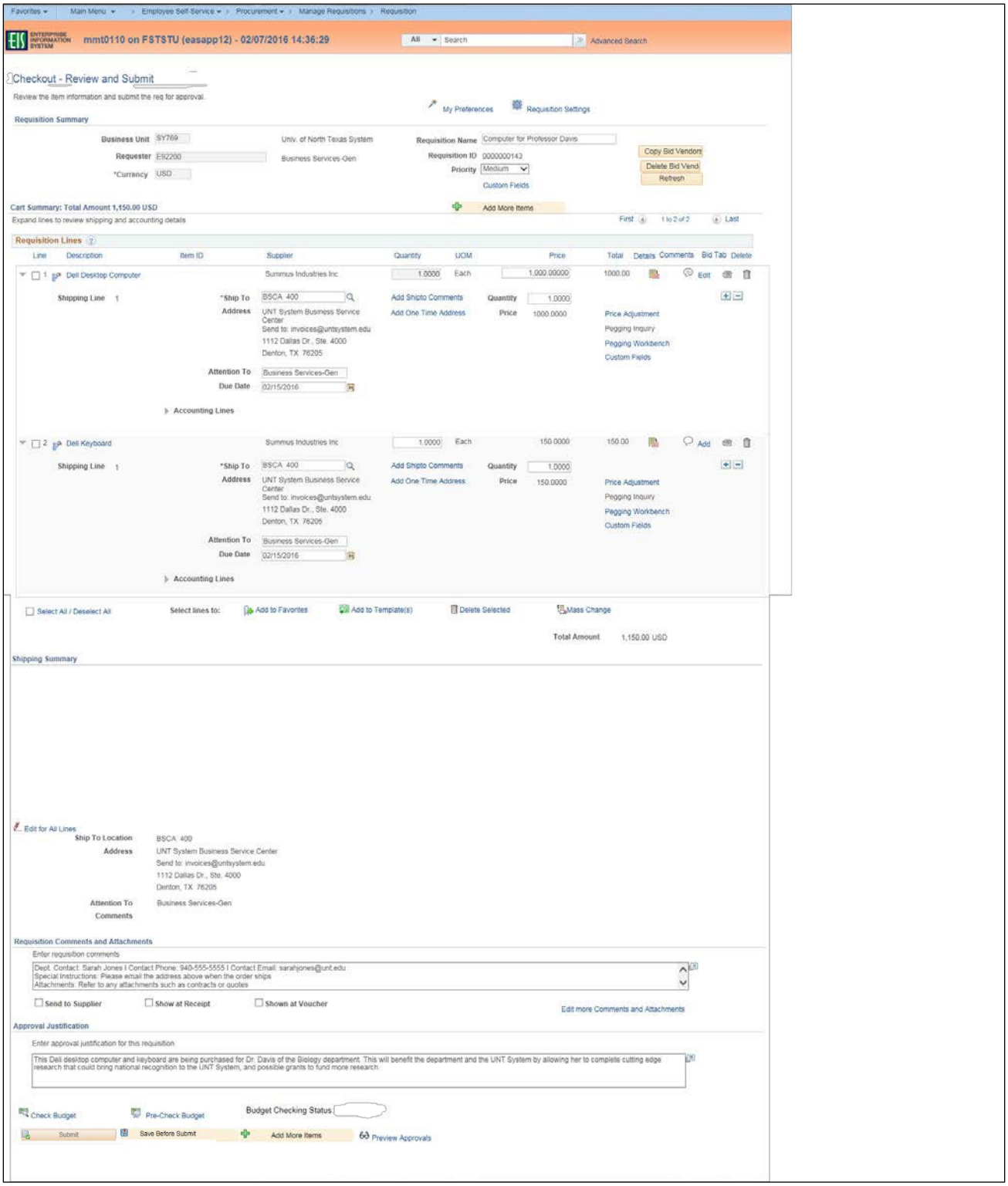
26. Click **OK**.



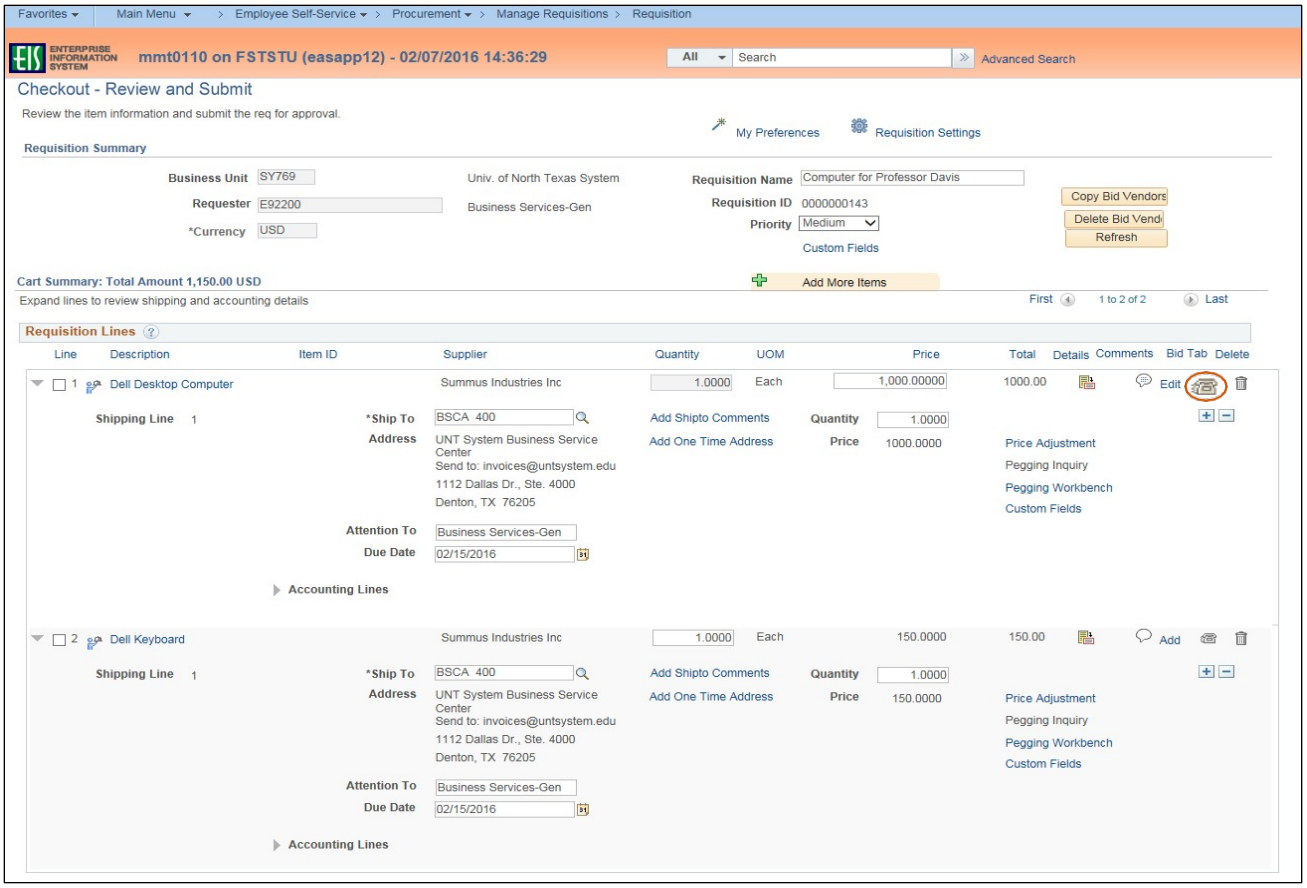
27. Scroll to the **Approval Justification** section at the bottom of the screen.
    Note: A business justification is necessary for every purchase, and should answer these questions as it pertains to the department and the purchase. The comment entered in this section should explain
    - Why this purchase is being made?
    - What is the purpose of the purchase?
    - Who in the department is this purchase for?
28. Enter **Approval Justification** comments that meet the defined criteria, and any other information that may be needed by the requisition approver.



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

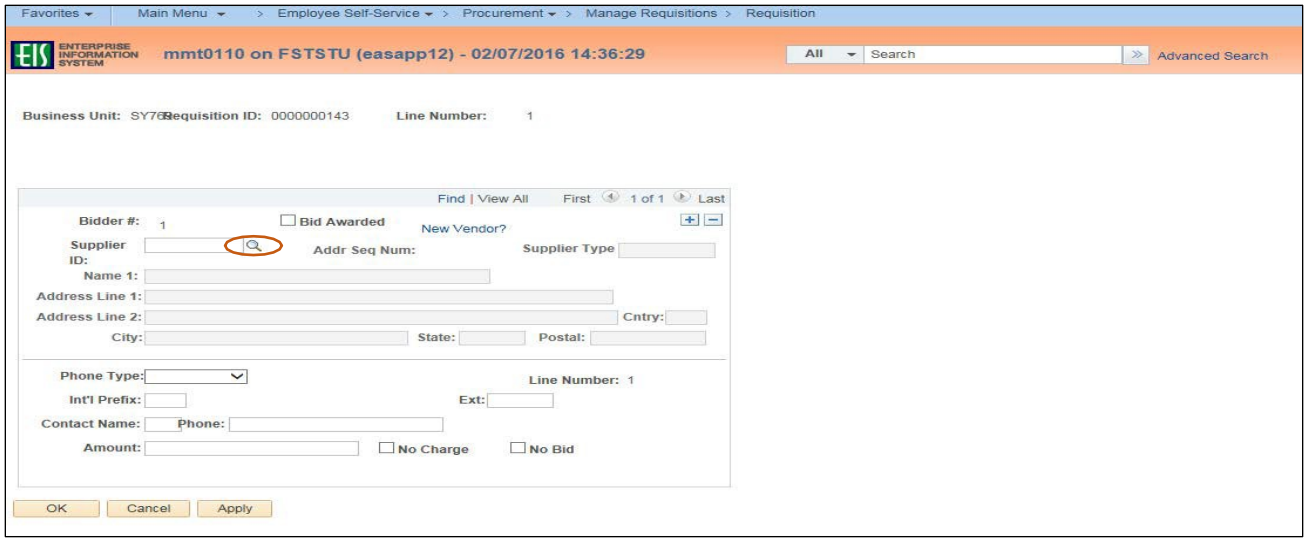


30. Click the Telephone icon beside the **Comment** icon to complete the **Bid Tab**, if applicable.
    Note: **Bid Tab** only needs to be completed for Line 1.

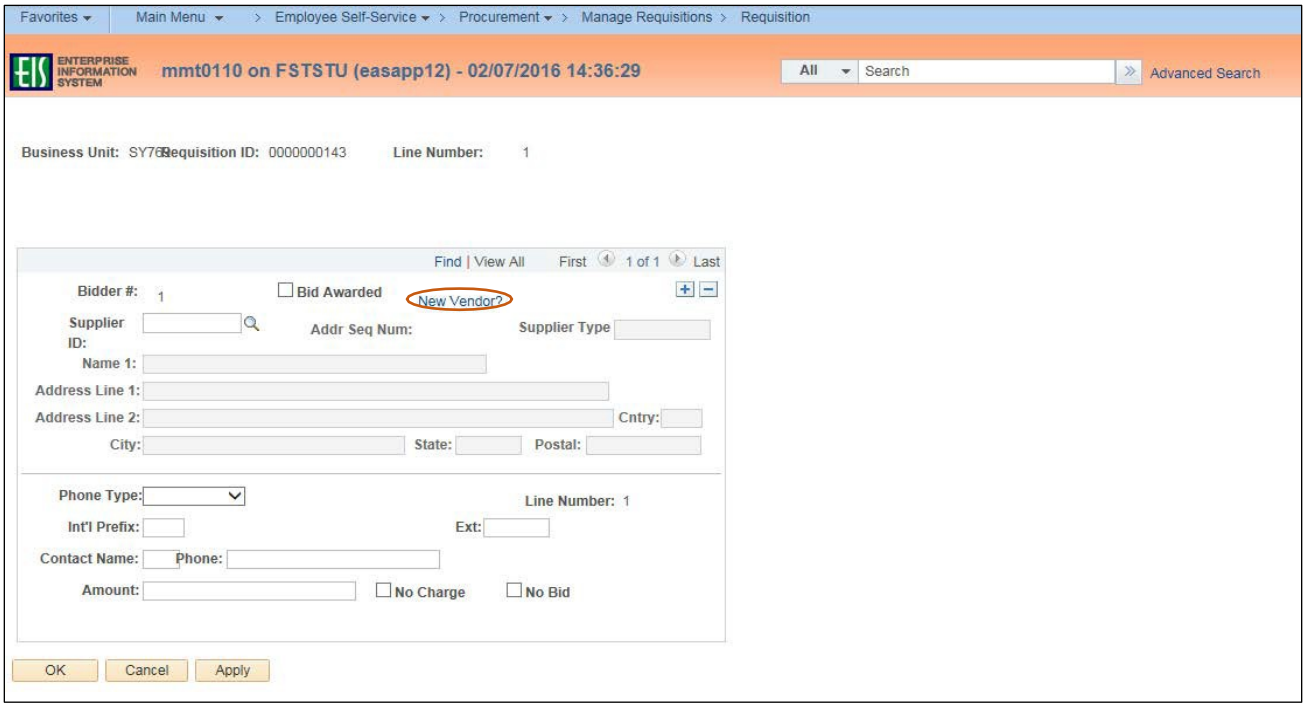


Note: If you are using a **Suggested Supplier** skip to step 33.

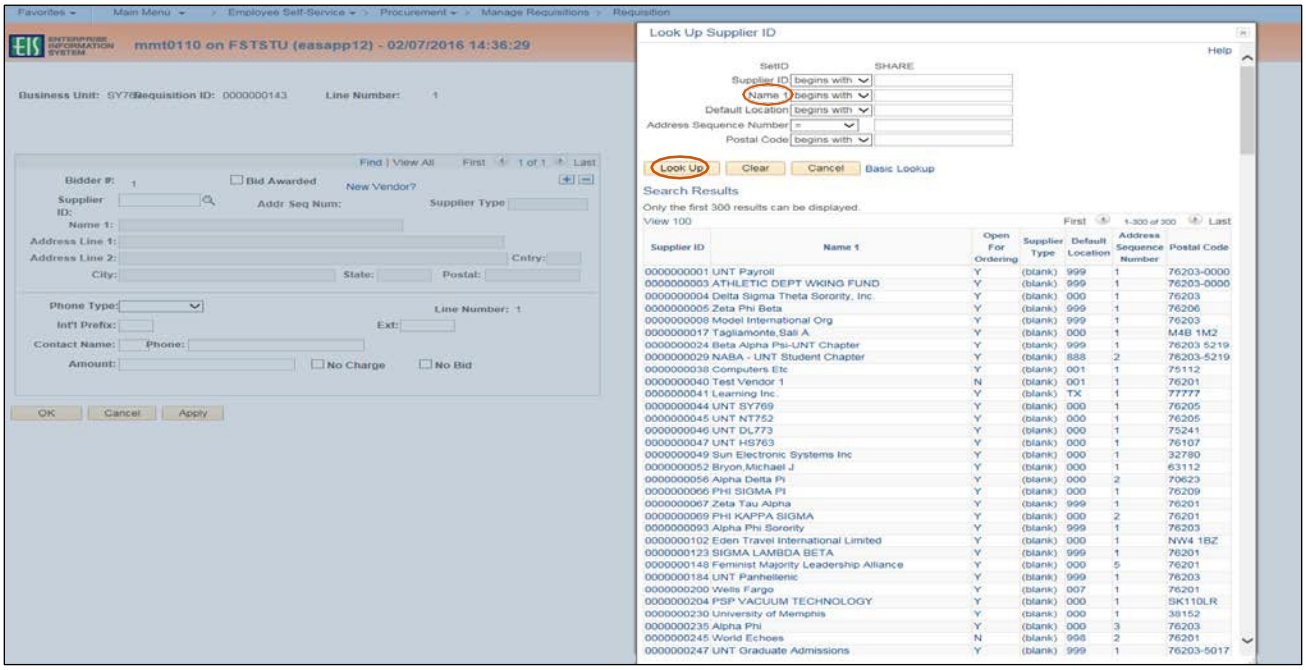
31. Click on the magnifying glass next to the **Supplier ID** field.
32. Skip to step 37.



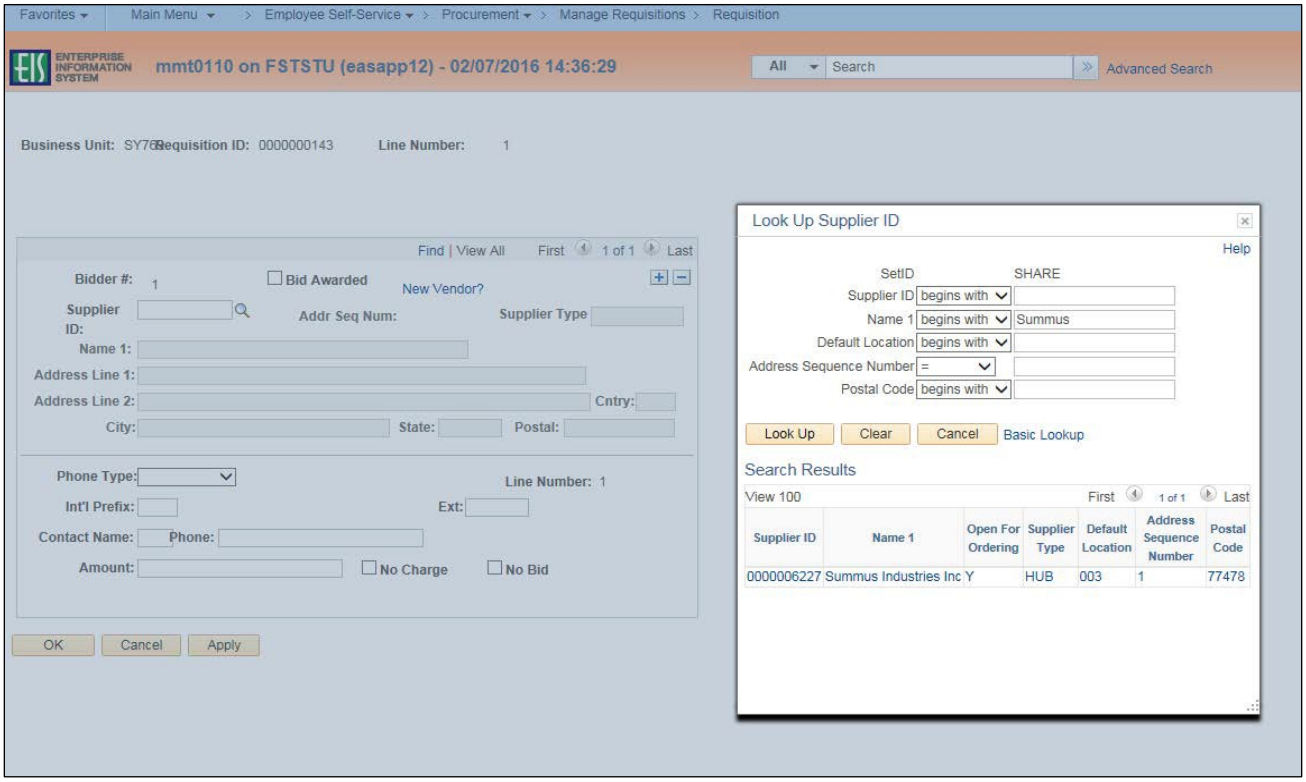
33. Click the link labeled **New Vendor?**.
34. Enter information for the new vendor in the fields that follow, including **Name 1**, **Address**, **Phone Type**, **Contact Name**, **Phone,** and **Amount**.
35. Click **OK**.
36. Skip to step 41.



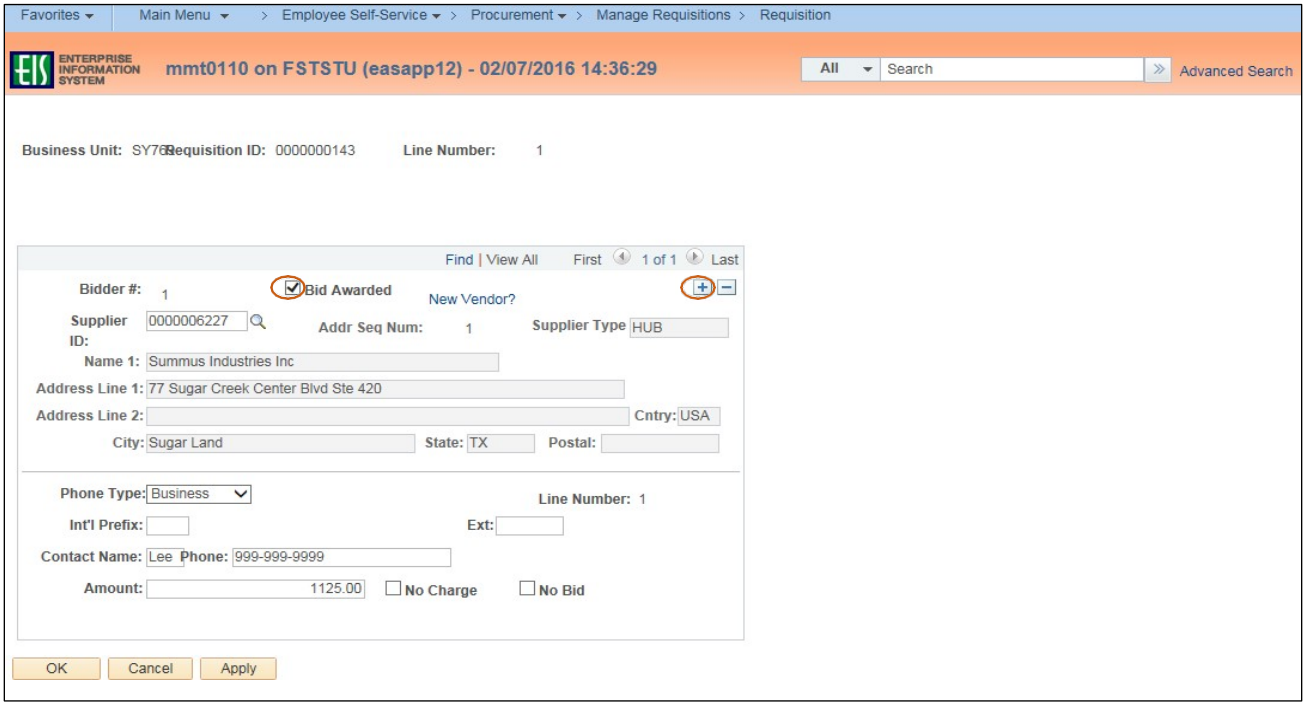
37. Enter Supplier name in the **Name 1** field.
38. Click **Look Up**.



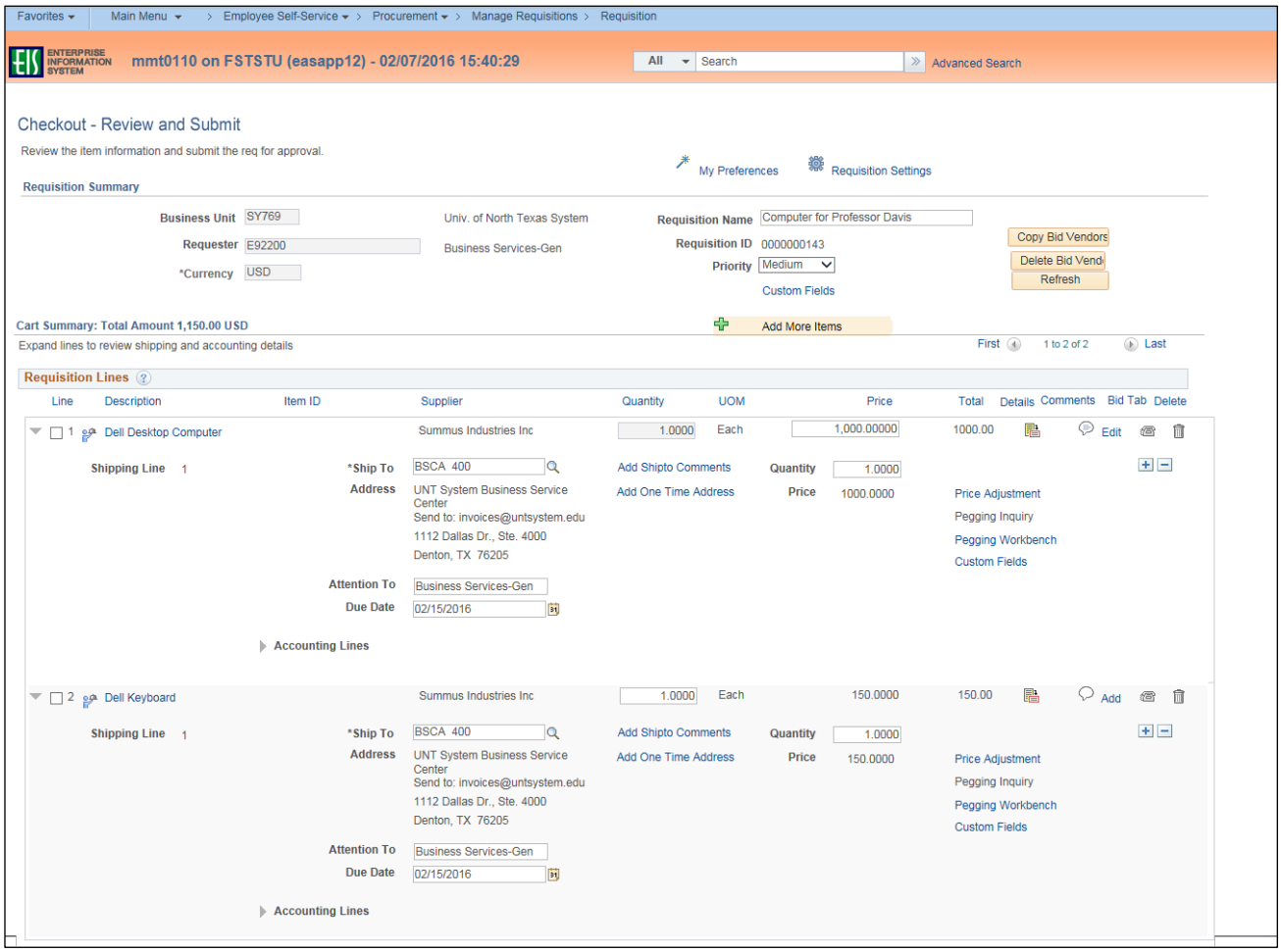
39. Select the appropriate **Supplier ID** from **Search Results** – confirming it lists the correct **Postal Code**. **Note**: If the appropriate **Name 1** does not appear in the **Search Results**, click **Cancel**. Enter **Name** and **Address** on the **Bid Tab** screen.



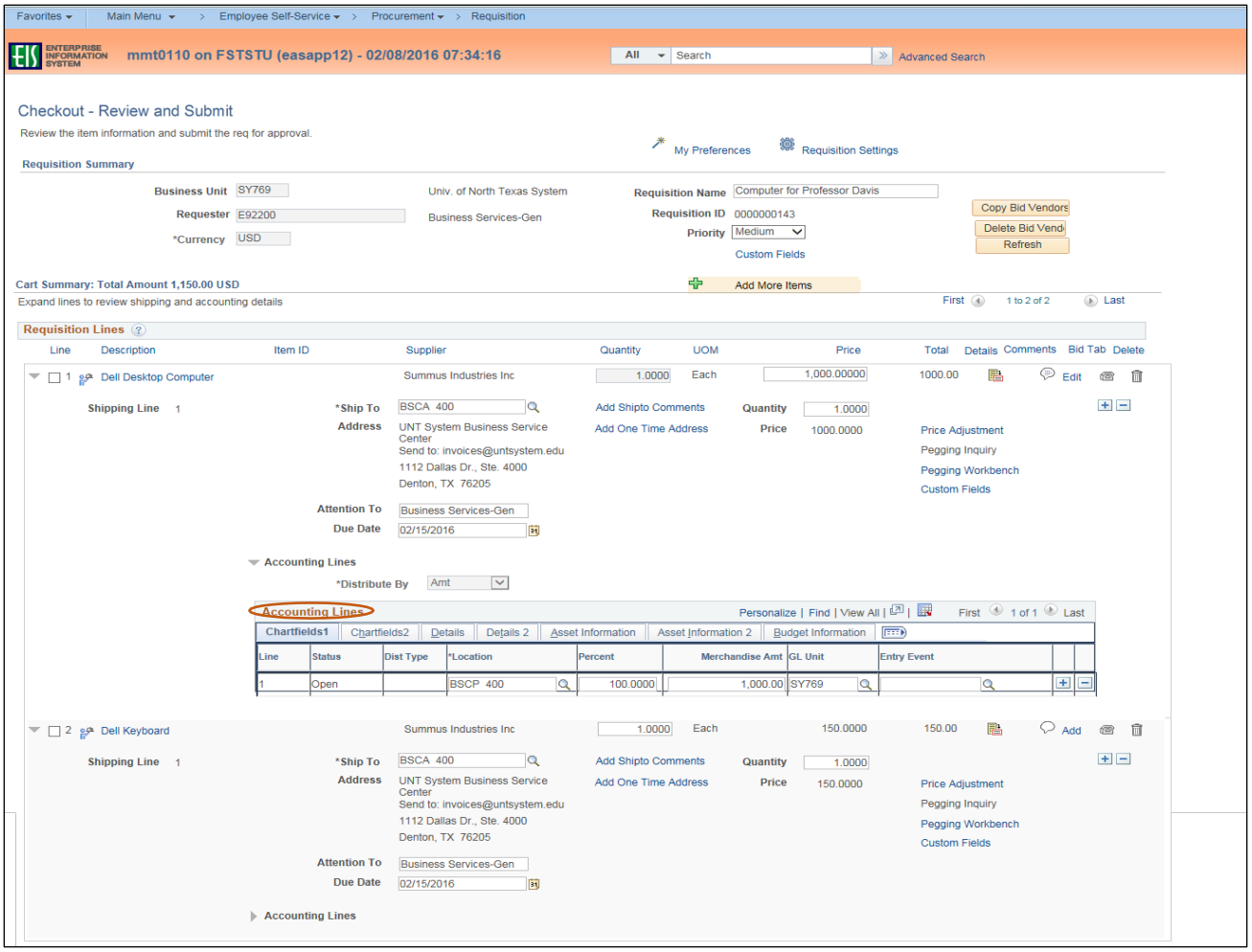
40. Enter **Contact Name** and **Phone.**
41. Enter the bid or quote amount received from vendor in the **Amount** field.



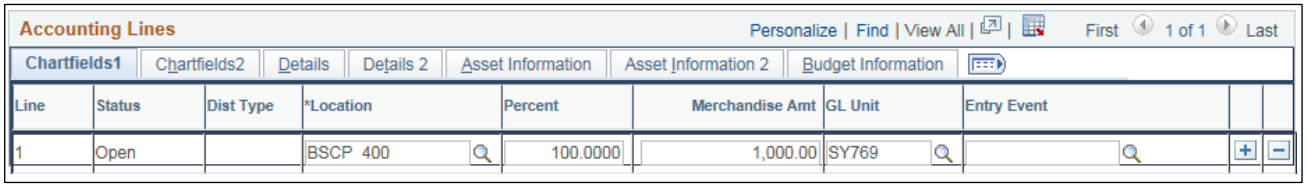
42. Click on + to add a new bid, if necessary.
43. Repeat steps 31 - 42 for each bid.
44. Click the box next to **Bid Awarded** as applicable.
    Note: **Supplier Type** automatically populates if identified as a HUB supplier.
45. Click **OK**.



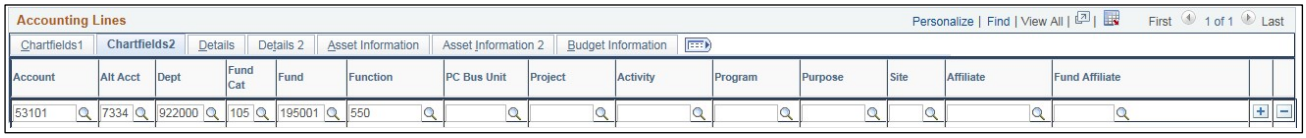
46. Click on the triangle icon ▶ next to **Accounting Lines**.
47. Review expense detail for accuracy in **Chartfields 1** and **Chartfields 2** in the **Accounting Lines** section by clicking on the appropriate tab.
48. Make changes as needed to ensure accuracy of expenditure codes.
    Note: Do not 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**.



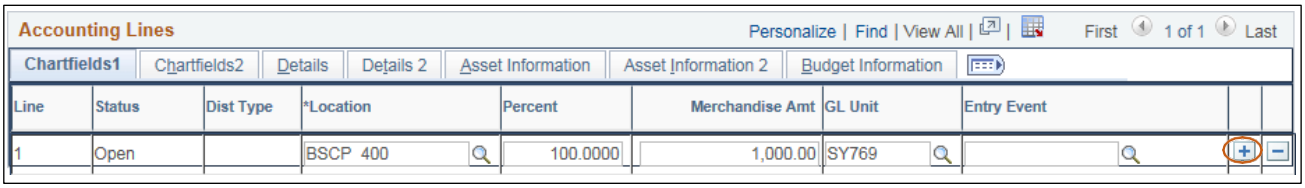
Chartfields 1



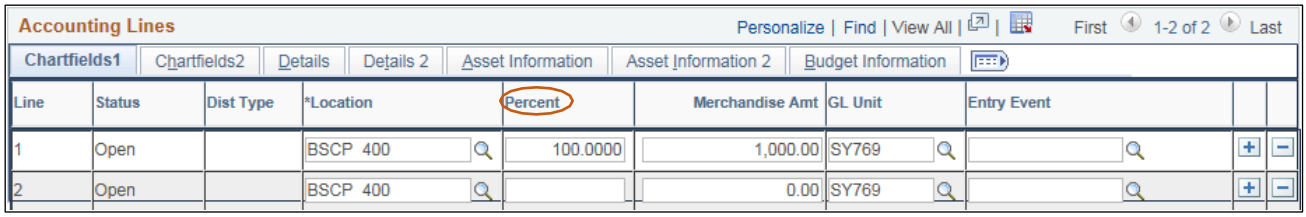
Chartfields 2



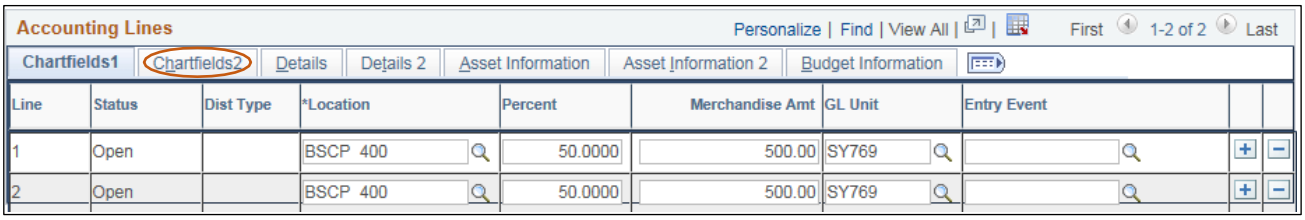
49. Follow steps 50-52 to split the expense between multiple funding sources. If you do not need to do this, skip to step 1 in the section **Reviewing Budget and Approvals and Submitting the Requisition**.
50. Click on the blue plus sign ➕ at the end of **Chartfields 1**.



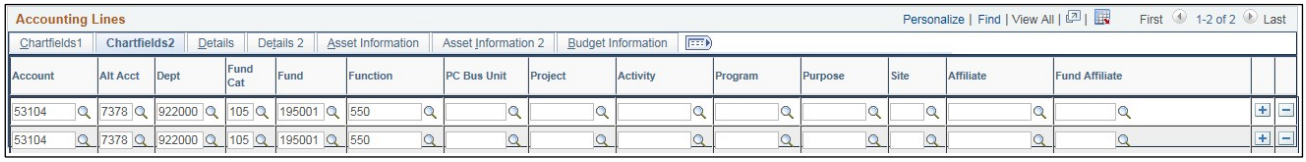
51. Distribute funding based on the quantity or percentage of the line amount.



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



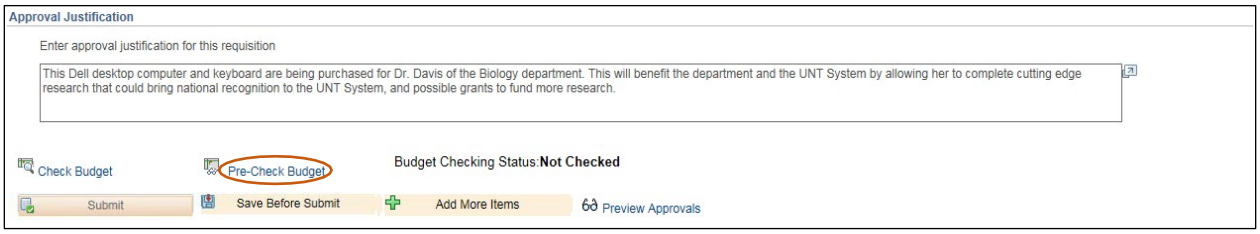
53. Make changes to the newly created distribution lines, as needed.



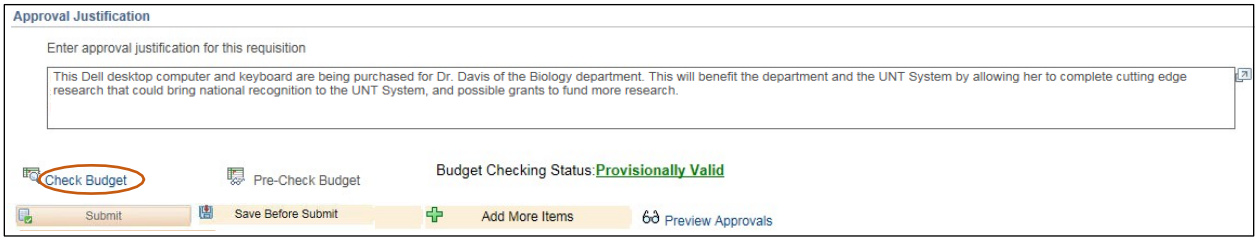
Reviewing Budget and Approvals and Submitting the Requisition

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

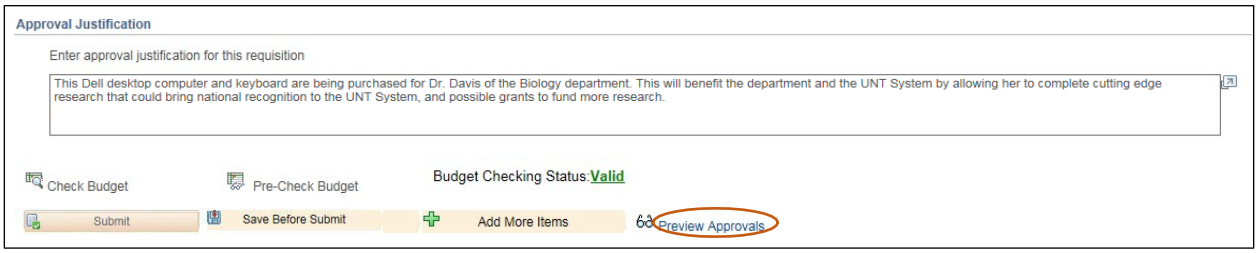
1. Click **Pre-Check Budget** at the bottom of the screen to conduct a pre-budget check, which verifies the availability of funds without encumbering the funds.
   Note: If your requisition does not pass the **Pre-Check Budget**, contact the budget office, if your requisition does pass, move on to step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



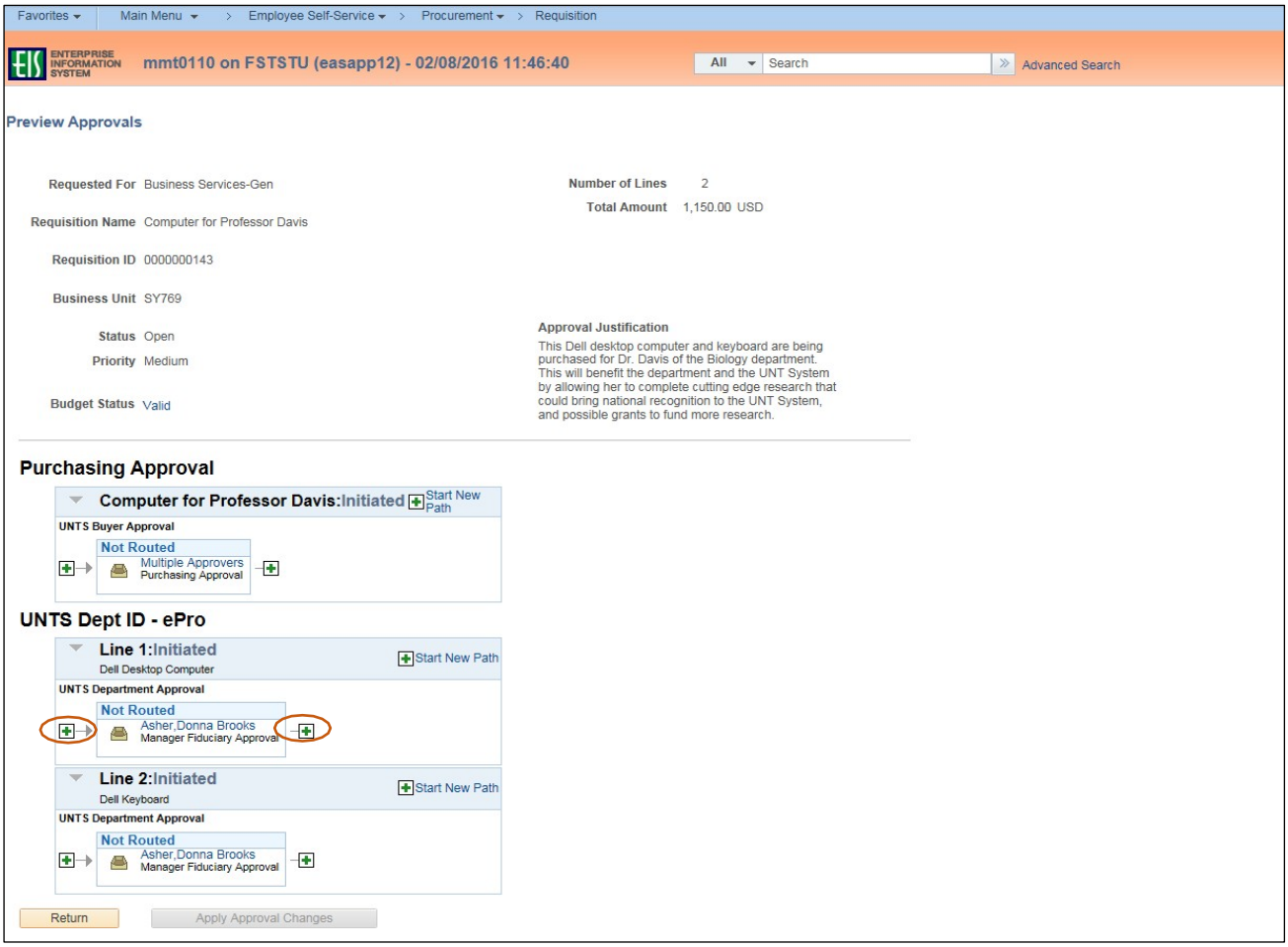
2. Click **Check Budget** to conduct an official budget check, and encumber the necessary funds.



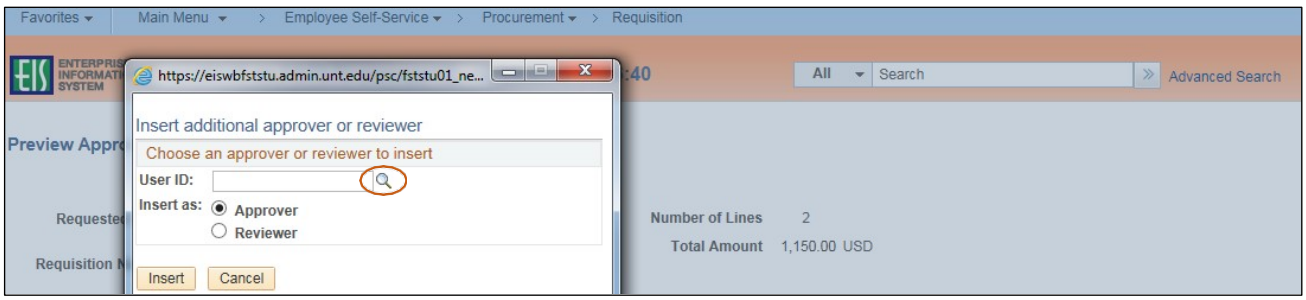
3. Click **Preview Approvals**.



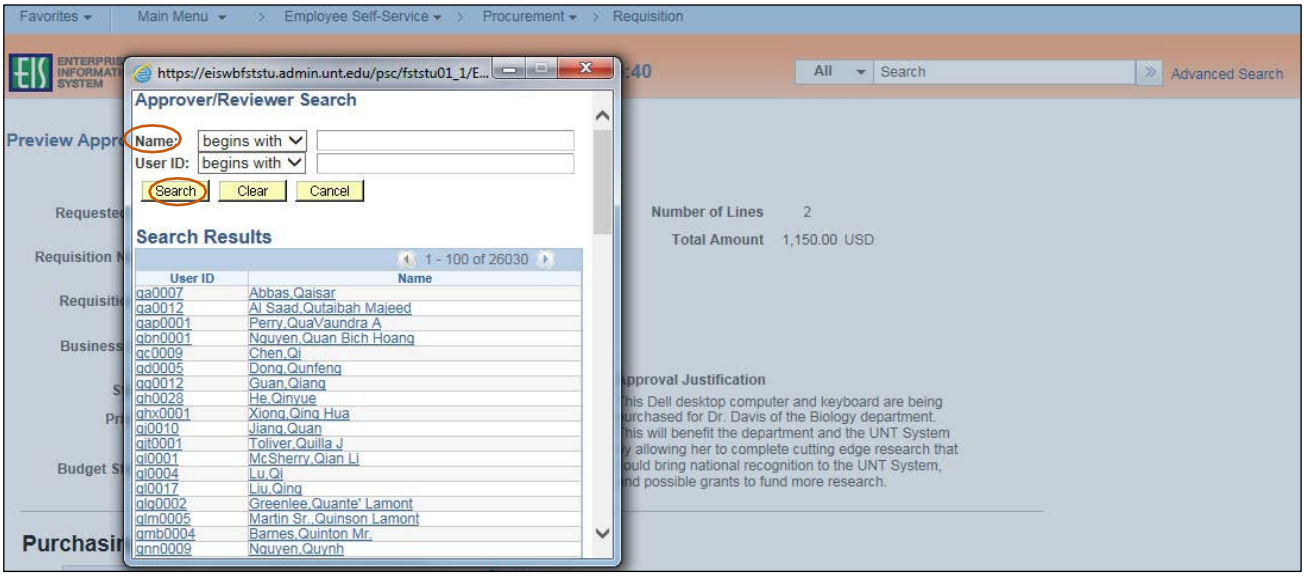
4. Review the **Preview Approvals** screen to ensure the requisition will be routed to the correct Approver for **UNTS Department Approval**.
   Note: If the requisition is set to route to the correct Approver, move on to step 13. If the requisition is not set to route to the correct Approver, move to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



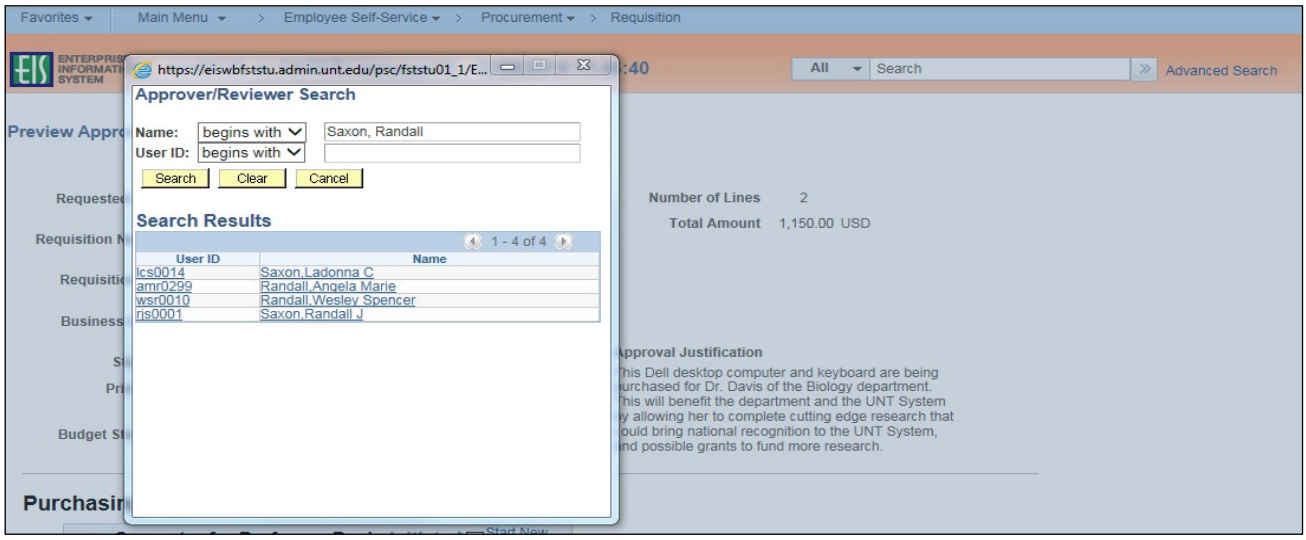
6. Click on the magnifying glass beside the blank **User ID** field.



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

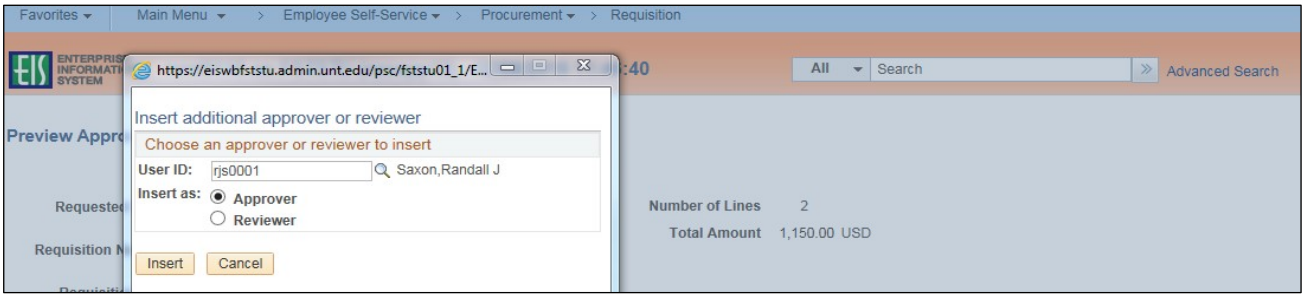


9. Select the appropriate **Name** or **User ID** for the Approver/Reviewer you want to insert.

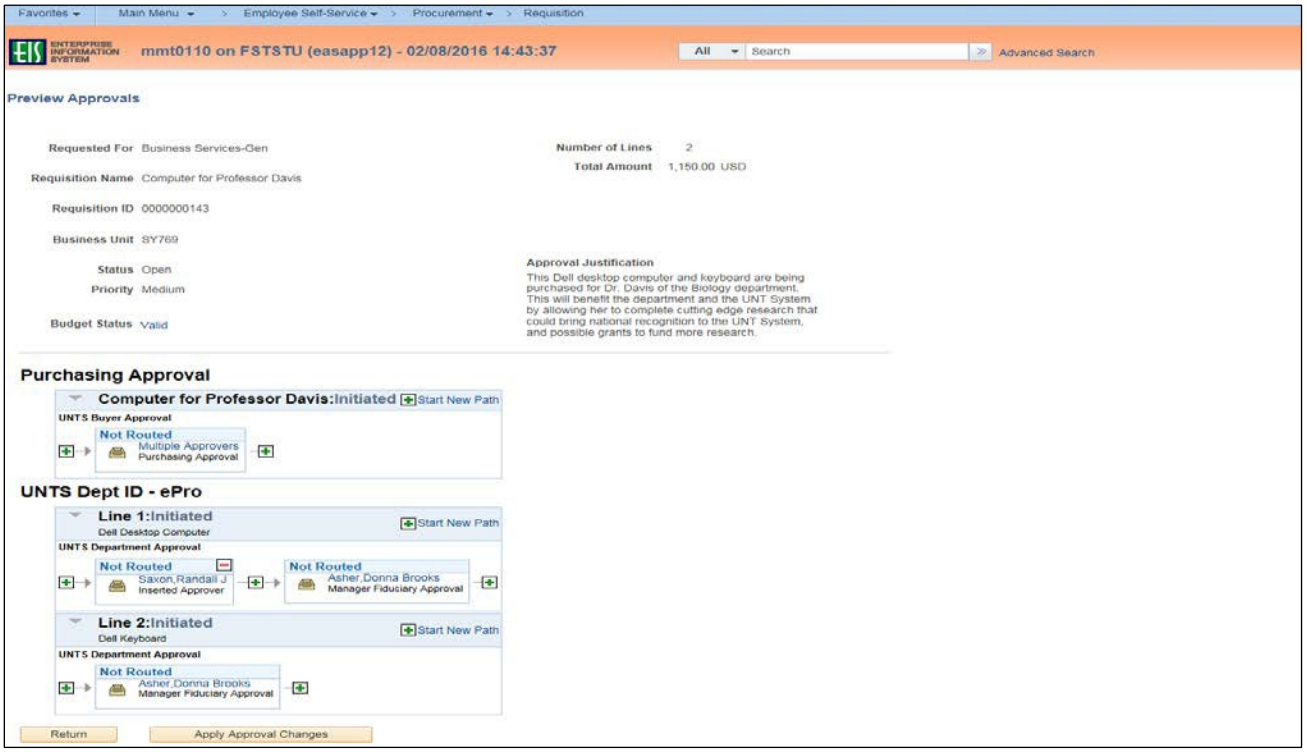


10. Click **Insert**.

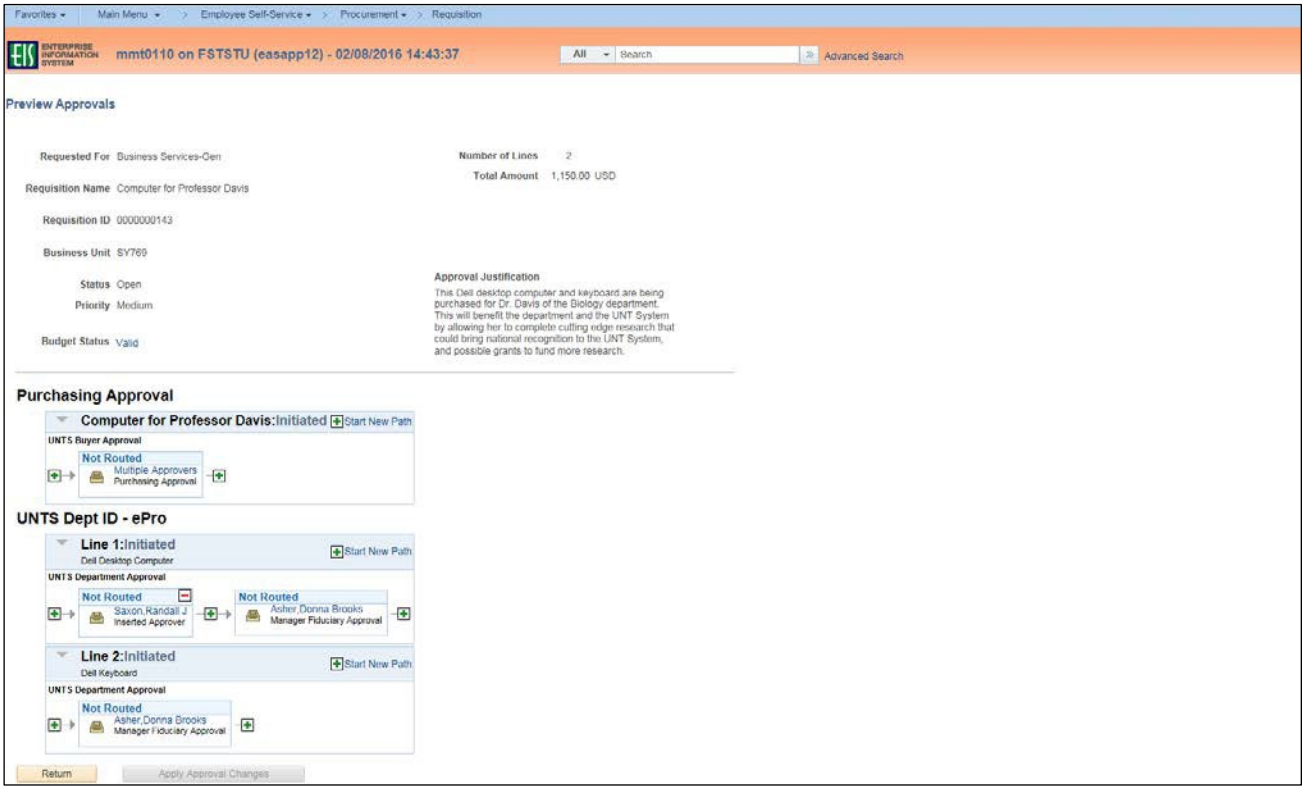
    Note: If you would like to insert someone as a Reviewer of the requisition instead of as an Approver, select the **Reviewer** option.



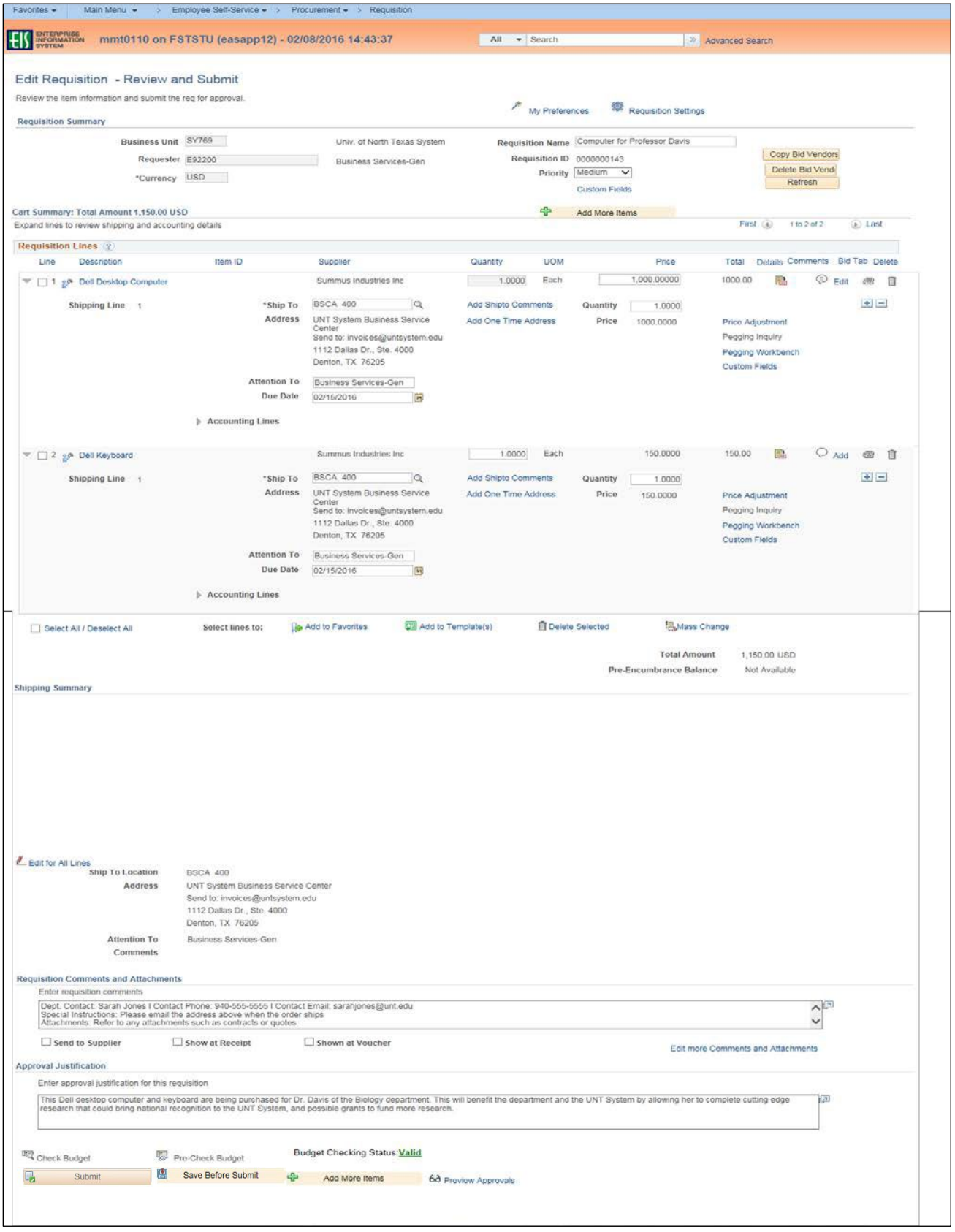
11. Click **Apply Approval Changes**.
12. Repeat steps 4-11 for each additional Approver or Reviewer you need to add.



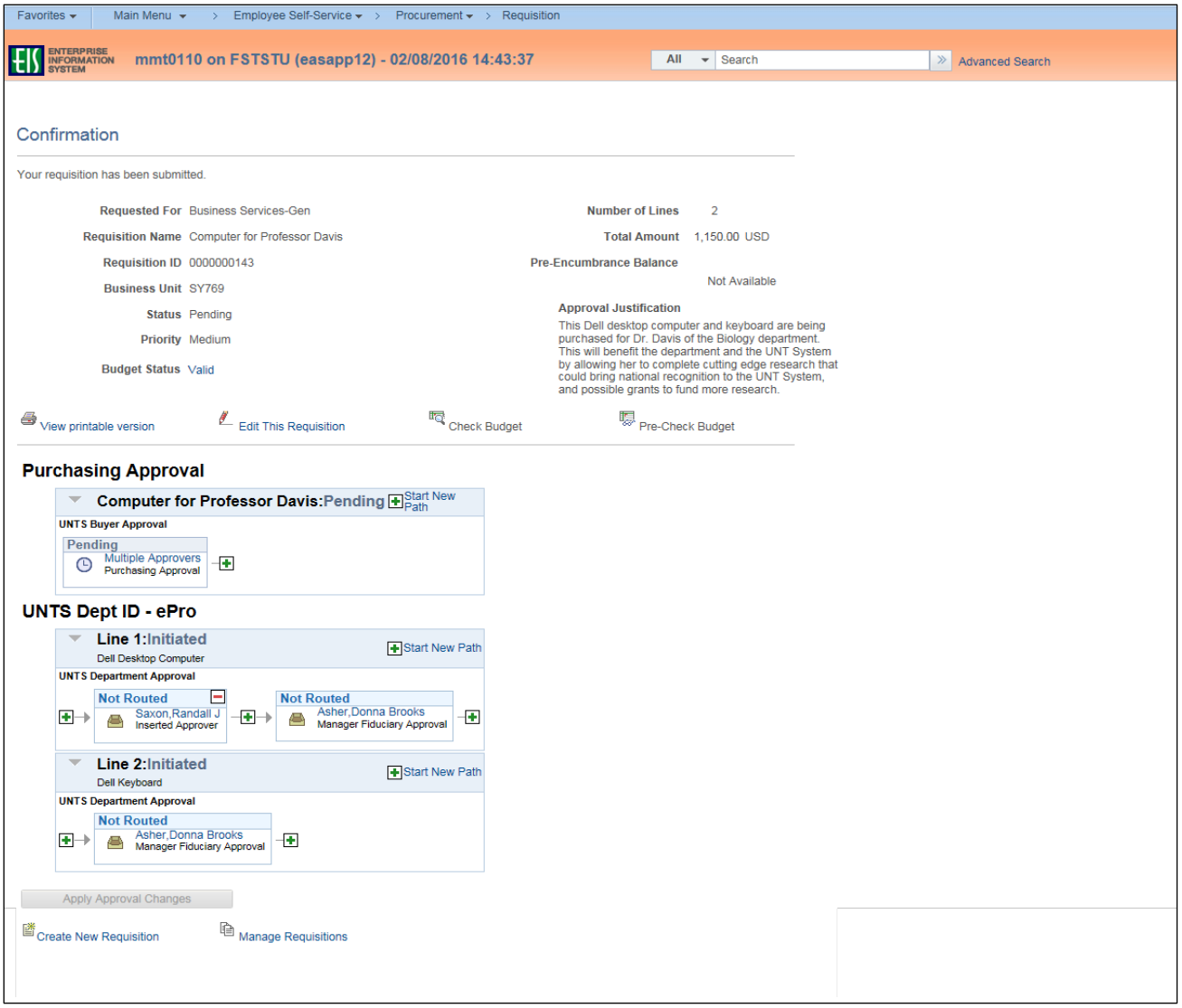
13. Click **Return**.



14. Click S**ubmit**.



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.