eProcurement Training

Instructor: Nancy Milburn
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating a Special Request Requisitions for Goods</td>
<td>3</td>
</tr>
<tr>
<td>Creating a Special Request Requisition for Variable Cost Service</td>
<td>17</td>
</tr>
<tr>
<td>Creating a Special Request Requisition for Fixed Cost Service</td>
<td>32</td>
</tr>
<tr>
<td>Processing Receipts</td>
<td></td>
</tr>
<tr>
<td>Receipt processed through eProcurement Manage Requisitions</td>
<td>45</td>
</tr>
<tr>
<td>Receipt processed through eProcurement Receive Items</td>
<td>50</td>
</tr>
</tbody>
</table>
Creating a Requisition for Goods

- Log into myFSU
- **Click Fi** for Financials
- Click the eProcurement link
• Click Requisition
• You are now on the Requisition Settings page. Search for a Supplier or enter the Supplier number in the appropriate field.
• To search, click the magnifying glass to the right of the Supplier field
• Enter a string of letters in the Supplier name and click “Find”
• Select Supplier from the list by clicking the Supplier ID link.
• When selected, system will return to the Requisition Settings page.

Click magnifying glass to search for category code.
- Click arrow next to “Description” and get drop box.
- Select “contains” and enter a string of letters in the description of the category you need.
• System goes back to Requisition Settings page.
• To select a Unit of Measure, click the magnifying glass next to the field.
• Scroll through the list and select the most appropriate choice. "EA" for each is a good default choice if appropriate.
• System goes back to Requisition Settings page.
• To select a Unit of Measure, click the magnifying glass next to the field.
• Scroll through the list and select the most appropriate choice. “EA” for each is a good default choice if appropriate.
• Most Requesters will have a default Ship To address assigned to their UserID. If that is where items are to be shipped, make no changes. To change, click the magnifying glass next to the field and search for a different Ship To address. Select by clicking the Location link.
• System goes back to Requisition Settings page.
• To select a due date, click the little calendar next to the field to select the date or you can enter the date directly into the field.
• Due date is the date the Supplier has provided to you for when you will receive the goods.
• If left blank, system will default to 14 days and date may not be accurate.
• System goes back to Requisition Settings page.
• The Attention field is to enter the name of the individual that wants to receive the shipment from the supplier (optional)
• Enter the Dept/Fund and if applicable, Project information for the budget that will be used to pay for the merchandise in the Accounting Defaults fields. This example is for an E&G budget.
• Once all information is entered, review and click “OK” to go to next step
• Select the link for the type of order that you are entering.
• This example is a Special Request for commodities
• Click Special Requests
• The template for a commodity purchase will come up. Enter the item description including name of the item, item number, make, model, manufacturer, color, etc.
• The supplier needs all information needed so they know exactly what you are buying.
• Enter the price for the item(s) and the quantity in the appropriate fields.
• Click “Add to Cart” to add line.
• New template will come up, so when done adding lines, click “Checkout” to go to the next step.
• The “Checkout” button takes you to the Review page, which is for you to review your requisition.
• Check the information, making sure you included all required details, due dates, correct supplier, etc.
• When satisfied that all is correct, click “Save and Submit” when ready to submit.
• This page is your order confirmation.
• You see the requisition number and if you click in the “Pending” box, you can see the approvers for the budget you entered.
• Those approvers will receive an email notifying them to approve the requisition.
Creating a Requisition for a Variable Service

- Log into myFSU
- **Click Fi** for Financials
- Click the eProcurement link
• Click Requisition
• You are now on the Requisition Settings page. Search for a Supplier or enter the Supplier number in the appropriate field.
• To search, click the magnifying glass to the right of the Supplier field.
• Enter a string of letters in the Supplier name and click “Find”.
• Select Supplier from the list by clicking the Supplier ID link.
• When selected, system will return to the Requisition Settings page.
• Look up the category code. For services, click the down arrow, check “contains” and enter “serv” in the field to the right.
• This pulls a list of all contractual services. Select the best fit for the service being submitted.
• When you click the number to the left of the service, it populates the field.
• To select a Unit of Measure, click the magnifying glass to the right of the field.
• Since this example is for a variable service (hourly rate), select “HR” or “MHR” for hourly charges.
• Click on the symbol to make a selection.
- Select a Ship To address by clicking the magnifying glass, click the down arrow next to “Description”, select “contains” and then enter a string of 5-6 letters that are in the department name
- Select the Ship To Location that corresponds with the building and room number for your department
• All services must have a Due Date selected. This is the ending date of the service.
• For this example, the Due Date will be May 30, 2015
• Click the calendar icon and select the date from the calendar or enter the date directly into the field.
• Budget information must be entered in the Accounting Defaults line
• Enter the Dept ID, Fund and if applicable, the PC Bus Unit, Project and Activity Code.
• Examples of both are listed to the left.
• The blank template will come up.
• Enter the service description (256 characters will fit the line). All services must include a description of the service, beginning and ending dates, and the name and full phone number for the FSU Contract Manager.
• Enter the Units of Work (# hours) and the Rate (cost per hour) in the appropriate fields
• Enter the Quote number or name of individual that provided the quote and the quote date in the appropriate fields
• Finally, enter the Beginning date in the appropriate field and click “Add to Cart” when completed to
• When you click “Add to Cart”, the system will give you a new template for Line #2. If you don’t have more lines to add, click the “Checkout” button.
• The Checkout – Review and Submit page lets you check your work.

• Ensure all details are correct by checking the Description, Supplier, Quantity, Price, and you can click to ensure the budget information is correct.

• When all is reviewed and determined correct, click “Save and Submit” to submit the requisition to your Approver.
- If changes are needed to the budget, category code, etc., click “Mass Change”.
- For this example, I have updated the category code to “furniture”.
- Click “Ok” when updates are completed.
Distribution Change Options

For the selected requisition lines that are available for sourcing, apply distribution changes to:

- **All Distribution Lines**
  Apply changes to all existing distribution lines.

- **Matching Distribution Lines**
  Apply changes to each existing distribution line by matching the distribution line numbers.

- **Replace Distribution Lines**
  Remove the existing distribution lines and replace with the distribution lines changes.

When this page comes up, determine if the change is for all lines or just selected lines. Make the appropriate selection, then click "Ok".
You will go back to the Checkout – Review and Submit page.
Click “Save and Submit” to submit the requisition to your Approver.
• The Confirmation page gives you the Requisition number.
• As you can see, the requisition is in Pending status awaiting approval from the individual(s) listed in the “Pending” box.
• To see who is eligible to approve the requisition and how to contact them, click the “Multiple Approvers” link.
• If only one approver is eligible, you may see a name here.
• The box to the left shows an example of what information is in the box.

<table>
<thead>
<tr>
<th>Approver #1</th>
<th>Approver #2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong> Eric Algoe</td>
<td><strong>Name:</strong> Melissa Cueto</td>
</tr>
<tr>
<td><strong>Empl ID:</strong> 000099344</td>
<td><strong>Empl ID:</strong> 000078670</td>
</tr>
<tr>
<td><strong>Department:</strong> 010000</td>
<td><strong>Department:</strong> 010000</td>
</tr>
<tr>
<td><strong>Supervisor ID:</strong></td>
<td><strong>Supervisor ID:</strong></td>
</tr>
<tr>
<td><strong>Telephone:</strong></td>
<td><strong>Telephone:</strong></td>
</tr>
<tr>
<td><strong>Reports To Position</strong></td>
<td><strong>Reports To Position</strong></td>
</tr>
<tr>
<td><strong>Number:</strong> 00051102</td>
<td><strong>Number:</strong> 00051567</td>
</tr>
<tr>
<td><strong>Email ID:</strong> <a href="mailto:EALGOE.ps_invalid@admin.fsu.edu">EALGOE.ps_invalid@admin.fsu.edu</a></td>
<td><strong>Email ID:</strong> <a href="mailto:MMORRISONCUETO.ps_invalid@admin.fsu.edu">MMORRISONCUETO.ps_invalid@admin.fsu.edu</a></td>
</tr>
</tbody>
</table>
To enter another requisition, you can click the Create New Requisition link at the bottom.
Creating a Requisition for a Fixed Cost Service

- Log into myFSU
- **Click Fi** for Financials
- Click the eProcurement link
• Click Requisition
You are now on the Requisition Settings page. Search for a Supplier or enter the Supplier number in the appropriate field.

To search, click the magnifying glass to the right of the Supplier field.

Enter a string of letters in the Supplier name and click “Find”
• Select Supplier from the list by clicking the Supplier ID link.
• When selected, system will return to the Requisition Settings page.
• Look up the category code. For services, click the down arrow, check “contains” and enter “serv” in the field to the right.
• This pulls a list of all contractual services. Select the best fit for the service being submitted.
• When you click the number to the left of the service, it populates the field.
• To select a Unit of Measure, click the magnifying glass to the right of the field.
• Since this example is for a fixed cost service (lump sum payment), select “EA” the lump sum. (If you have two payments, you can put each payment on a separate line)
• Click on the symbol to make a selection.
• Select a Ship To address by clicking the magnifying glass, click the down arrow next to “Description”, select “contains” and then enter a string of 5-6 letters that are in the department name
• Select the Ship To Location that corresponds with the building and room number for your department
• All services must have a Due Date selected. This is the ending date of the service.
• For this example, the Due Date will be May 30, 2015
• Click the calendar icon and select the date from the calendar or enter the date directly into the field.
Budget information must be entered in the Accounting Defaults line.

- Enter the Dept ID, Fund and if applicable, the PC Bus Unit, Project and Activity Code.

Examples of both are listed to the left.
• The blank template will come up.
• Enter the service description (256 characters will fit the line). All services must include a description of the service, beginning and ending dates, and the name and full phone number for the FSU Contract Manager.
• Enter the Value of Service (one time cost) in the appropriate field.
• Enter the Quote number and/or name of individual that provided the quote and the quote date in the appropriate fields.
• Finally, enter the Beginning date in the appropriate field and click “Add to Cart” when completed.
• In this example, it is a one day service.
The system will give you a new template for Line #2. If you don’t need any more lines added, click “Checkout” button.
• The “Checkout” button takes you to the Review page, which is for you to review your requisition.

• Check the information, making sure you included all required details, due dates, correct supplier, etc.

• When satisfied that all is correct, click “Save and Submit” when ready to submit.
This page is your order confirmation.

You see the requisition number and if you click in the “Pending” box, you can see the approvers for the budget you entered.

Those approvers will receive an email notifying them to approve the requisition.
Processing a Receipt through ePro Manage Requisitions

- Go to myFSU>Financials>eProcurement>Manage Requisition
• Click Manage Requisitions
• To search for the requisition to receive on, remove the date in the Date From field
• Click “Search”
• Select the order you need to process the receipt for and click the down arrow next to the “Select Action” box.
• Click “Receive” and then click “Go”.

• Select the lines that need to be received by clicking the box to the left of each line.
• Click “Receive Selected”.

To view the requisition and line items for a requisition, click the triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.
- Make any changes to the quantity as needed. (Ex: if you physically received only 1 of line item #1, then change the quantity to “1” before saving—see example).
- Do not process a receipt for items or services you have not received (you are certifying receipt of items/services when processing a receipt in OMNI).
- When all changes are made, click “Save Receipt”.

![Image of receipt processing interface](image-url)
• If any changes to quantities were made, you will see the top message. Click “Ok” if the quantity is correct. Click “cancel” if not correct and then fix.
• When satisfied with the quantities, click “Ok” to save the receipt.
• You will get the receipt number and can see the amounts received on the confirmation.
Process a Receipt through ePro Receive Items

- Log in to myFSU>Financials>eProcurement >Receive Items
- A list of all PO lines eligible for a receipt will come up to select from.
- Click the box to the left of the line you want to process a receipt against, then click “Receive Selected”.
- The line will come up for you to process.
• This example is a blanket PO. Update the Received Quantity with the amount on the invoice to be paid.
• Click “Ok” when this message comes up.
• The confirmation will come up with the quantity you entered.
• You can write this receipt number on the invoice.

Receipt Saved Successfully
You have saved receipt # 0000660143 containing the following items:

<table>
<thead>
<tr>
<th>Receipt Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

Return to Manage Requisitions  Return to Receiving
Cancelling a Receipt through eProcurement

- Log in to myFSU>Financials>eProcurement>Manage Requisitions
- Remove the date in the “Date From” field to get all requisitions to come up.
- Click “Search”
- To open the order you need to cancel the receipt for, click the arrow to the left of the line to open the box.
- Click the “Receiving” icon.
• Click Search to get a list of all receipts that are eligible to be cancelled (cannot cancel once payment has been made).
• Click the red “X” to cancel the receipt.
The system will pull up the receipt lines and ask if you are sure you want to cancel this receipt. Click “Yes” to cancel. Once completed, the order is now showing up in “Dispatched” status in Manage Requisitions again.