Training and Documentation Manual
End User Training: Placing an Order

Welcome to E-Requisitioning

InsideTufts | Finance Division
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Signing in

At your browser type
https://ereqprod.uit.tufts.edu/EpicorEProcurement

You’ll be taken to the sign-in screen. Type in your Username and Password, then click the LOGIN button. This screen is also referred to as the “console.”

NOTE: Your login username & password are the same as it is for Tufts trumpeter e-mail (LDAP).
Setting Your Preferences

Each user has personal preferences for their profile. You can select default values for orders. Preferences also allow you to make changes for proxies (alternate system users) and add ad hoc approvers as needed. The next set of screens will highlight how to use preferences. At the “console” screen, click any icon.

Then, click Preferences on your menu bar. Define, update or simply view preferences if previously set.
Setting Your Preferences

It is at this tab, Requisition Codes, where you can set your preferred defaults, such as a Cost Center or Account. Click the Update button when finished.

Ship to locations are added by the system Administrator; free form addresses are not allowed.

Choose the correct Ship To location from dropdown as needed and click update. Scroll down to the bottom and select MORE to bring up the “Ship to Search” screen (next page). If your address doesn’t appear, call x75078.
You can enter part of your address and click search. Some addresses are by street while others are by building name.

Click on the address you want as your default

Click Update
It’s at the preferences/proxy screen where you may set your proxies as defined below:

**Approval Proxy** – this person can approve orders on your behalf  
**Requisition Proxy** – we aren’t using at this time  
**Requisition Proxy Group** – we aren’t using at this time  
**Reconciler Proxy** – we aren’t using at this time  
**Default Corporate Card Admin** – we aren’t using at this time  
**Preferred Ad Hoc Approver** – this person will default as a local approver for all orders entered by you

Please note that we will not be using Credit Card, Application or Region preferences.

If your settings are done, click Update.

If you are going on vacation, this is where you would assign an Approval Proxy. If you don’t put an end date, the proxy will remain until it is removed.

If you Click … to add a default Ad Hoc Approver, follow directions on next page.
Enter part of the last name and click search.

Highlight the User and click Submit.
Click Update to Save Your Proxy Preferences.

Note: You need to log out and log in again before entering a new requisition for your ad-hoc approver to default.
Placing an Order: Getting Started

At the console screen, select Create an Order, as shown below.

Enter your order information as needed. All fields should be complete.

NOTE: If you see a number adjacent to Orders Submitted, it means that you have that many orders “pending”, i.e., not yet approved. When approved, that particular order will be subtracted from the count.

These comments are not fed into PeopleSoft. They are internal comments.
Placing an Order: Selecting A Supplier

When you first login, the supplier field will be blank. After completing an order, the supplier will default from the last order entered in the same session.

1. Type first letter(s) of supplier then click ...
2. Highlight the supplier and click Submit.
3. To change, enter part of the supplier name and click to search.

Can't find your supplier? Call x73225.
When you are finished entering this information, scroll up to the top.

Scroll down to enter DepId, Project or Grant (cost center).

Enter information as needed. You can search by code or description.

If you know the code, you can enter it here and click Find.
Now that you have scrolled back to the top.....

Click Add to Basket

A message appears in red, reminding you of FAR regulations that must be followed.

Federal regulations (FAR) require a Supplier Justification Form (SOF) be completed for all orders. If this order is $10,000 or greater please click here to complete and attach this form.

If you click the blue link within that message, you will need to follow directions as shown in the appendix of this manual.
Please take note: **Catalog and Favorites are not in use at this time.**

If the order requires approval other than the university rules, add the approver(s) here. Add part of the approver last name and Click .

To add more items, Click **Non Catalog** and you will be brought back to the first screen.

Scroll down the page and you will see Start Date and End Date, which you **MUST** use when creating Blanket Orders; optional for other types or reqs.
If using a “ship to” address that is different from your default in your profile, scroll to the right to view the Shipping tab, just to the right of the Basket tab.

Click the arrow and scroll to the bottom "more" to search for your address.
Enter part of your address and click search. Some addresses are by street while others are by building name. Call x75078 if you aren’t able to find your address.

Click on the address you want.

Various search types are available.

Click OK to change ship to for all lines.
If you are shipping to someone other than yourself, enter the person’s name & department.

You’ll need to include department, building & room number for desktop deliveries to persons other than yourself. Please note that on this screen, only the Attn: line can be edited.
Adding an Attachment

Click the icon to add a **line item** attachment.

Use this icon if you want an attachment pertaining to an entire order, not just a line item.

Click New
After clicking on NEW, click Browse to find the attachment on your computer or network drive.

Please enter file to upload as attachment:

[Browser dialog box]

Click BROWSE

Highlight the file and click Open
Enter comments if necessary and click Load

When you receive the message stating success, click the Close button.
Your file to be attached should now be listed.

Click the **Done** button.
Submitting Your Order

To place your order, click submit.

Your order has been submitted!

Once you have received this notation that a requisition number has been established, you will need to wait for a 5 minute refresh period for a PO# to be generated – assuming it is an instant PO, not requiring the approval of others.
Splitting Charges

This section pertains to the splitting of charges for an order. Splits can be made by item or by the total amount of the line.

If you are splitting before adding the items to your basket, scroll down and click splits here.

The item must be in your basket before adding a split, click OK to continue.
If the items are already in your basket, click the "" to get to the splits screen.

Scroll Down and click Splits.
Choose the split method

Click **Edit** to change the distribution for the first split

Change as necessary and click **Update**
Change Amount, Percentage or Qty for this distribution and click Add Split

Click Edit to change the distribution for the next split. Repeat steps for each distribution.
Click **Save Split Information** when done.

Remaining to allocate must = 0 for all.

Click **Update** to change distribution.
Inquiring on an Order

There are a few ways to check on an order. If you are already on this page, Click Orders.

If you want to check from the console, click on Check Order Status.
Enter search criteria and click Search OR click search for all.

You can only view orders for yourself (from this page). An approver can see orders that they approved (instructions available in approver documentation).

You can sort the list by clicking on the column heading.

Click this icon to see order information (pg 30)

Click this icon to make a change to a requisition in process. (pg 33)

Click this icon to cancel the order (pg 35)
If you select the [icon] you are able to view many different screens of information.

The order tab gives a brief summary of supplier, requestor and date of order.

Click [icon] if you need to see item detail, such as deptid or splits.

If you would like to order these items again, click “Copy Order to Basket”
Viewing other tabs within Inquiry Orders.

The approvals tab will show if an order is pending, approved, disapproved or completed.
Viewing other tabs within Inquiry Orders.
If you select the icon you are able to **make a change** to a requisition in progress. When you click the icon, you'll see this question:

Click OK

Click to make changes to Item information (including Cost Center & Supplier)
Make changes as necessary and click update when done.
If you select the icon you are able to **cancel an order** in progress. You’ll be taken to this screen. Click the Cancel Order button.

Depending on the order status, you will receive one of the messages below, click OK to cancel.
Print Requisition Feature

You can click on the Print Requisition button to view a requisition, print it out, or save it as a pdf. After clicking the Print Requisition button you will see this:

Note: you may need to call your FSP for technical assistance in enabling pop-ups, running Active-X, etc.
This is the view req detail. If for some reason you need to print a copy, use the print icon.

You can also save this requisition as a pdf. Click on the first icon on the tool bar, export this report.

This box will appear. Select pdf from the drop down and then select OK.
## Icon Inventory

<table>
<thead>
<tr>
<th>Icon</th>
<th>Where it appears</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="pen.png" alt="Pen" /></td>
<td>Various</td>
<td>Show more information about the line (distribution, supplier, req type)</td>
</tr>
<tr>
<td><img src="trash.png" alt="Trash Can" /></td>
<td>Various</td>
<td>View/Add/Delete attachment</td>
</tr>
<tr>
<td><img src="trash.png" alt="Trash Can" /></td>
<td>Various</td>
<td>Delete item/distribution</td>
</tr>
<tr>
<td><img src="pen.png" alt="Pen" /></td>
<td>Order Status Page</td>
<td>PO sent to PeopleSoft (system said supplier)</td>
</tr>
<tr>
<td><img src="check.png" alt="Check Mark" /></td>
<td>Order Status Page</td>
<td>Accept Order (will be turned off)</td>
</tr>
<tr>
<td><img src="delete.png" alt="Delete" /></td>
<td>Order Status Page</td>
<td>Cancel the order</td>
</tr>
<tr>
<td><img src="pen.png" alt="Pen" /></td>
<td>Order Status Page</td>
<td>Change order</td>
</tr>
<tr>
<td><img src="information.png" alt="Information" /></td>
<td>Order Status Approval Page</td>
<td>Show more information about the order</td>
</tr>
<tr>
<td><img src="basket.png" alt="Basket" /></td>
<td>View Order Page Line Item</td>
<td>Add item to basket for re-order</td>
</tr>
<tr>
<td><img src="basket.png" alt="Basket" /></td>
<td>View Order Page Line Item</td>
<td>Indicates there is an attachment</td>
</tr>
<tr>
<td><img src="information.png" alt="Information" /></td>
<td>View Order Page Line Item</td>
<td>Shows item description (we aren’t using items so this will be blank)</td>
</tr>
<tr>
<td><img src="information.png" alt="Information" /></td>
<td>Order Status Page</td>
<td>Re-sends purchase order to supplier – This will NOT be used, the po will not be sent to supplier from the system.</td>
</tr>
</tbody>
</table>
Appendix

As noted on page 13 of this manual, if you select to link to the Supplier Justification Form from the electronic requisition, please follow these steps:

1. Click on the link and then open the file when asked (see below).

2. When you click Open, the form will appear. Complete the form.

3. Print out the completed form, and obtain signature. Close the form on your screen unless you choose to save it to your desktop.

4. Scan in the signed form and save on your computer as a pdf.

5. Attach that pdf to your requisition, as shown on page 18 of this manual. You will see that your pdf has been successfully attached when you see this icon on your screen.