

SDCOE MITI Finance Refresher Activity eProcurement Quick Source Requisitions

This activity details the steps required to source a requisition which has been approved and budget checked.

Navigation: Main Menu > eProcurement>Buyer Center>Quick Source Requisitions

Step	Action
1.	Click the Add a New Value tab.
2.	Click in the Run Control ID field. Enter the desired information into the Run Control ID field. “QUICK_SOURCE”
3.	Click the Add button.
4.	Select Purchase Orders in the Request Type dropdown.
5.	Confirm the Item ID Required checkbox is unchecked .
6.	Enter Procurement Business Unit in the From Business Unit and the To Business Unit fields.
7.	Enter Requisition ID in the From Requisition ID and the To Requisition ID fields.
8.	Click the Sourcing Options tab.
9.	Enter Buyer ID in the Buyer field.
10.	Enter ONL in the Origin field.
11.	Enter a reference name in the Purchase Order Reference field.
12.	Click Run .
13.	Click OK .

SDCOE MITI Finance Refresher Activity eProcurement Requisition

This activity details the steps required to create a purchasing requisition.

Navigation: Main Menu > eProcurement>Requisition

Step	Action
1.	Click the Requisition Settings link.
2.	Name the requisition with a reference in the Requisition Name field. “New PC for John W”
3.	Select Ship To from lookup.
4.	Enter attention information in Attention field. “Deliver to John”
5.	Click OK .
6.	Click the Special Request link.
7.	Enter Item Description . “Lenovo IBM ThinkPad T450s 20BX-14” Core i5 5300U”
8.	Enter Price . “1,432.99”
9.	Enter Quantity . “1”
10.	Enter Unit of Measure , or choose from lookup. “EA”
11.	Enter Category using the lookup. Once the lookup is selected you can search by Category or by Description.
12.	Enter Supplier ID , or choose from lookup. This is optional but maybe required by your district.
13.	Enter Supplier Item ID . “3616724”
14.	Click Add to Cart . If adding more items go back to Step 4.
15.	Click Checkout button.
16.	Click the Select All / Deselect All checkbox. This is assuming that all the lines of the requisition will have the same chartstring .
17.	Click the Mass Change link.
18.	Enter the Location field using the lookup.
19.	Enter appropriate chartstring for transaction.
20.	Enter any comments needed.
21.	Enter any approval justification.
22.	Click Save & Submit .

SDCOE MITI Finance Refresher Activity eProcurement Requisition for Stores

This activity details the steps required to create a stores requisition.

Navigation: Main Menu > eProcurement>Requisition

Step	Action
1.	Click the Requisition Settings link.
2.	Name the requisition with a reference in the Requisition Name field. “Stores Office Supplies”
3.	Select Ship To from lookup.
4.	Enter attention information in Attention field. “Deliver to John”
5.	Click OK .
6.	Enter Search criteria in the Search field. “Paper”
7.	Once desired item is found and inventory status is confirmed Enter Quantity and Click Add . If adding more items go back to Step 6.
8.	Click Checkout button.
9.	Click the Select All / Deselect All checkbox. This is assuming that all the lines of the requisition will have the same chartstring .
10.	Click the Mass Change link.
11.	Enter the Location field using the lookup.
12.	Enter appropriate chartstring for transaction.
13.	Enter any comments needed.
14.	Enter any approval justification.
15.	Click Save & Submit .

SDCOE MITI Finance Refresher Activity Copy Requisition to Purchase Order

This activity details the steps required to copy a Requisition to a Purchase Order.

Navigation: Main Menu > Purchasing>Purchase Orders>Add/Update POs

Step	Action
1.	Click the Add button.
2.	Enter Supplier by either the Supplier field or the Supplier ID field.
3.	Enter a reference in the PO Reference field. “Blanket for Tree Service”
4.	Select Requisition from the Copy From dropdown.
5.	Select lines to be copied, click Copy To PO .
6.	Review Purchase Order for accuracy, click Save .
7.	Budget Check the Purchase Order.
8.	Submit for Approval.

SDCOE MITI Finance Refresher Activity Direct Entry of Purchase Order

This activity details the steps required to create a Purchase Order directly without a Requisition.

Navigation: Main Menu > Purchasing>Purchase Orders>Add/Update POs

Step	Action
1.	Click the Add button.
2.	Enter Supplier by either the Supplier field or the Supplier ID field.
3.	Enter a reference in the PO Reference field. “Blanket for Tree Service”
4.	Enter Description . “Tree trimming and removal”
5.	Enter PO Qty . “1”
6.	Enter UOM . “EA”
7.	Enter Category . “72150000”
8.	Enter Price . “5,000”
9.	Click the Schedule icon.
10.	Enter the Ship To .
11.	Click the Distribution icon.
12.	Enter appropriate chartstring for transaction, click OK .
13.	Click the Return to Main Page link.
14.	If another line is needed click the Add Row icon, and go to line 4.
15.	If Freight is to be added choose 13-Header Misc. Charges from the Go to dropdown. If no freight needed go to step 23.
16.	Click Miscellaneous Charges link.
17.	Choose FREIGHT from the Miscellaneous Charge lookup.
18.	Enter Freight Charge in the Amount field.
19.	Click OK .
20.	Select the lines which will share the cost of the freight entered using the Sel column of check boxes.
21.	Click Allocate box.
22.	Click Return to Main Page link.
23.	Click Save .
24.	Budget Check the Purchase Order by clicking Budget check icon.
25.	Submit for Approval by clicking approval icon.

SDCOE MITI Finance Refresher Activity Purchase Order Receipt

This activity details the steps required to create a Purchase Order Receipt.

Navigation: Main Menu > Purchasing>Receipts>Add/Update Receipts

Step	Action
1.	Click the Add button.
2.	Enter Supplier by either the Supplier field or the Supplier ID field.
3.	Use the Search Criteria fields to find the desired Purchase Order .
4.	Check the checkbox's for the lines which you need to process a receipt.
5.	Click OK .
6.	Confirm the Receipt Qty for each line.
7.	If attaching scanned documents click Add Header Comments link. If not go to step 12.
8.	Use Attach button to attach file from your PC.
9.	In comment box give description of attachment. "Packing Slip"
10.	Click the Show at Voucher checkbox.
11.	Click OK .
12.	Click Save .

SDCOE MITI Finance Refresher Activity Purchase Order Receipt for Inventory Items

This activity details the steps required to create a Purchase Order Receipt for Inventory replenishment.

Navigation: Main Menu > Purchasing>Receipts>Add/Update Receipts

Step	Action
1.	Click the Add button.
2.	Enter Supplier by either the Supplier field or the Supplier ID field.
3.	Use the Search Criteria fields to find the desired Purchase Order .
4.	Check the checkbox's for the lines which you need to process a receipt.
5.	Click OK .
6.	Confirm there is an INV Status column for the receipt.
7.	Confirm the Receipt Qty for each line.
8.	If attaching scanned documents click Add Header Comments link. If not go to step 12.
9.	Use Attach button to attach file from your PC.
10.	In comment box give description of attachment. "Packing Slip"
11.	Click the Show at Voucher checkbox.
12.	Click OK .
13.	Check the Interface Receipt checkbox.
14.	Click Save .