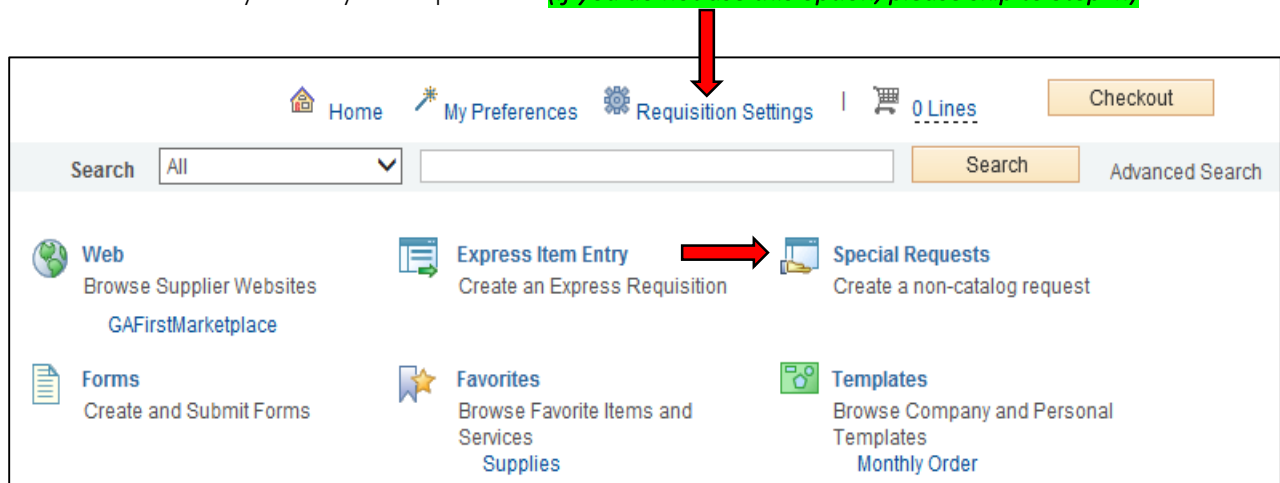




Job Aid EPC2 Create a Special Request Requisition

1. Select **eProcurement** from the menu
2. Select **Requisitions**
3. **If** you would like to use **Requisition Settings** to enter default settings/data (which is a time-saving option when creating multi-line requisitions), click the link prior to selecting '**Special Request**'. When using this function, please only use for the **Supplier, Unit of Measure** and **Category Code**. These fields will populate as the default information on every line of your requisition. **(If you do not use this option, please skip to Step 4.)**



4. Select '**Special Request**'
5. If you **did not use** **Requisition Settings** (step 3), complete steps a - i below for each line/item you need to enter including credit lines and shipping/freight:
 - a. Enter an **Item Description**
 - b. Enter the **Price** of the item
 - c. Enter the **Quantity** requested
 - d. Enter or select the **Unit of Measure** (most common is EA and JOB)
 - e. Enter the NIGP/Category code in the **Category** field using the Category Code Reference sheet:
<http://procurement.kennesaw.edu/docs/categorycodes.pdf>
(It is not recommended to use the search function for this field)
 - f. Enter the **Supplier ID** or the **Supplier Name**
 - g. If you have any information associated with the line, enter it in the **Additional Information** field
 - h. Check the '**Show at Receipt**' and '**Show at Voucher**' checkboxes
 - i. Select the '**Add to Cart**' button

The following fields will remain **blank**: Due Date, Supplier Item ID, Mfg ID, and Mfg Item ID

6. Confirm the Shopping Cart updated with your requisition line(s) in the upper right corner



7. Select the 'Checkout' button located beside the Shopping Cart

8. Enter a name for your requisition in the Requisition Name field

9. You can update the distribution/accounting information, using **one** of two methods below (*Individual Lines or Mutiple Lines*):

NOTE:

When using either option for accounting allocation changes:

If you use the SpeedChart function, you must also populate the **BudRef** field on the **Chartfields 2** tab.

If you manually enter the allocation, you must first populate the **GL Unit** field on the **Chartfields 1** tab in addition to populating the **BudRef** on the **Chartfields 2** tab.

To Update Accounting Allocation on Individual lines:

Click the **Expand** buttons (triangles) and make necessary updates for each line

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete																										
1	Testing		Apple Computer, Inc.	1.0000	Each	50.0000	50.00		Add																											
<p>Shipping Line 1</p> <p>*Ship To: <input type="text" value="KTP3700"/> Quantity: <input type="text" value="1.0000"/></p> <p>Address: KENNESAW STATE UNIVERSITY, TOWN POINT RM3700, 3391 TOWN POINT DR NW, KENNESAW, GA 30144. Price: 50.0000</p> <p>Attention To: <input type="text" value="Bohannon,Carolyn W"/> Price Adjustment, Pegging Inquiry, Pegging Workbench</p> <p>Due Date: <input type="text"/></p>																																				
<p>Accounting Lines</p> <p>*Distribute By: Qty SpeedChart: <input type="text"/></p> <p>Accounting Lines: Personalize Find View All First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Chartfields1</th> <th>Chartfields2</th> <th>Chartfields3</th> <th>Details</th> <th>Details 2</th> <th>Asset Information</th> <th>Asset Information 2</th> <th>Budget Information</th> </tr> <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><input type="text" value="KTP3003"/></td> <td>1.0000</td> <td>100.0000</td> <td>50.00</td> <td><input type="text" value="43000"/></td> <td></td> </tr> </tbody> </table>											Chartfields1	Chartfields2	Chartfields3	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		<input type="text" value="KTP3003"/>	1.0000	100.0000	50.00	<input type="text" value="43000"/>	
Chartfields1	Chartfields2	Chartfields3	Details	Details 2	Asset Information	Asset Information 2	Budget Information																													
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1	Open		<input type="text" value="KTP3003"/>	1.0000	100.0000	50.00	<input type="text" value="43000"/>																													

To Update Accounting Allocation on Multiple lines simultaneously:

Select the line checkboxes of all the lines you need to update, then select the **Mass Change** link



- Update the accounting allocation by populating the information on **Chartfields 1 – 3** tabs or by using the **SpeedChart** field/box
- Update the **Ship To Location** if necessary

Edit Lines/Shipping/Accounting for Selected Lines ✕ Help

Line Information ?

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID Supplier Location
Buyer Category

Shipping Information

Ship To Location ← [Add One Time Address](#)
Due Date Attention
Ship Via Freight Terms
Comments

Accounting Lines

SpeedChart

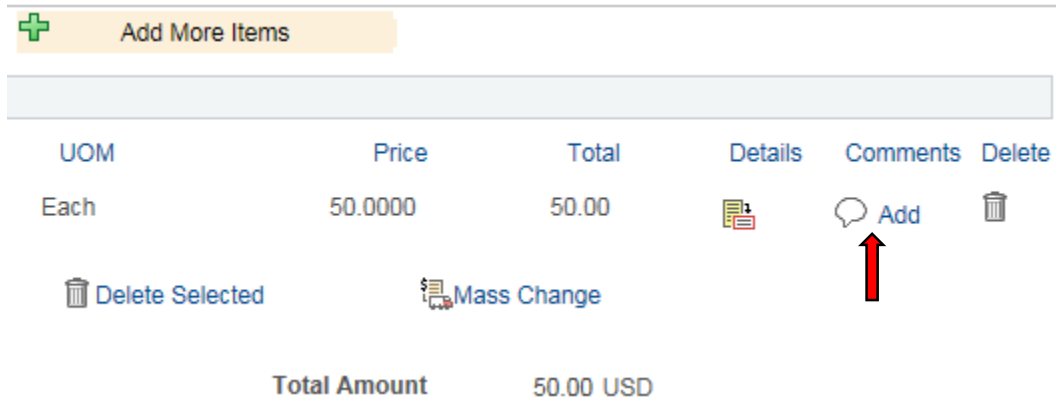
Please enter GL Business Unit before selecting other chartfield values

Accounting Information					Personalize Find <input type="text"/> <input type="text"/>		First 1 of 1 Last	
Chartfields1	Chartfields2	Chartfields3	Details	Asset Information				
Dist	Percent	Location	GL Unit	Account				
1	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

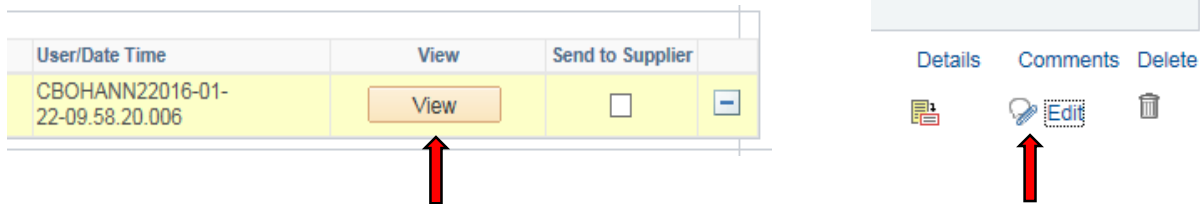
[Load Values From Defaults](#)

- Click **'OK'**
- Click **'OK'** for **All Distribution Lines** to apply to all selected lines

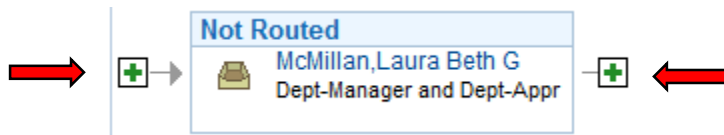
- To add supporting documentation, click on the Comment bubble or the Add link at the end of the first line of your requisition; **DO NOT** use the *"Add More Comments and Attachments"* link at the bottom of the screen.



- Click **'Add Attachments'** and **Browse** for the saved scanned documents
- Once located, click on your file and click **'Open'**
- Click **'Upload'** and then **'OK'**
- To verify you have attached your document(s), you will be able to see a **'View'** button on the screen where you added the documentation and you will see a paperclip will be attached to your Comment bubble on the line when you return to the **'Review and Submit'** screen



- Enter the business purpose or comments in the **Approval Justification** field (**NOTE:** Do not include any slashes / in your comments)
- Select the checkboxes for **'Show at Receipt'** and **'Shown at Voucher'**
- To insert any additional approvers (if requested or required),** click **'Save for Later'** then the **Preview Approvals** link
- Click on a green plus sign to search for the **User ID** of the Approver you would like to insert, click **'Insert'**



- Click **'Apply Approval Changes'** button
- Click **'Save & Submit'** to start the requisition lines into the approval workflow