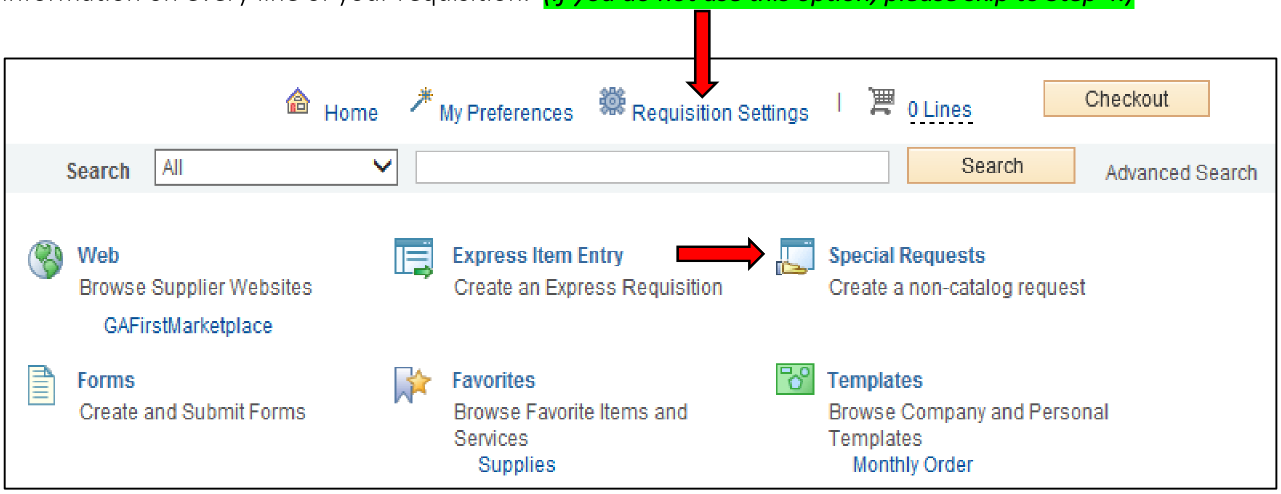
Job Aid EPC2
Create a Special Request Requisition

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 <u>prior</u> 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 <u>did not use</u> **Requisition Settings** *(step 3)*, complete steps **a - i** below <u>**for each line/item you need to enter including**</u> 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** <u>or</u> 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 <u>**blank**</u>: 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:

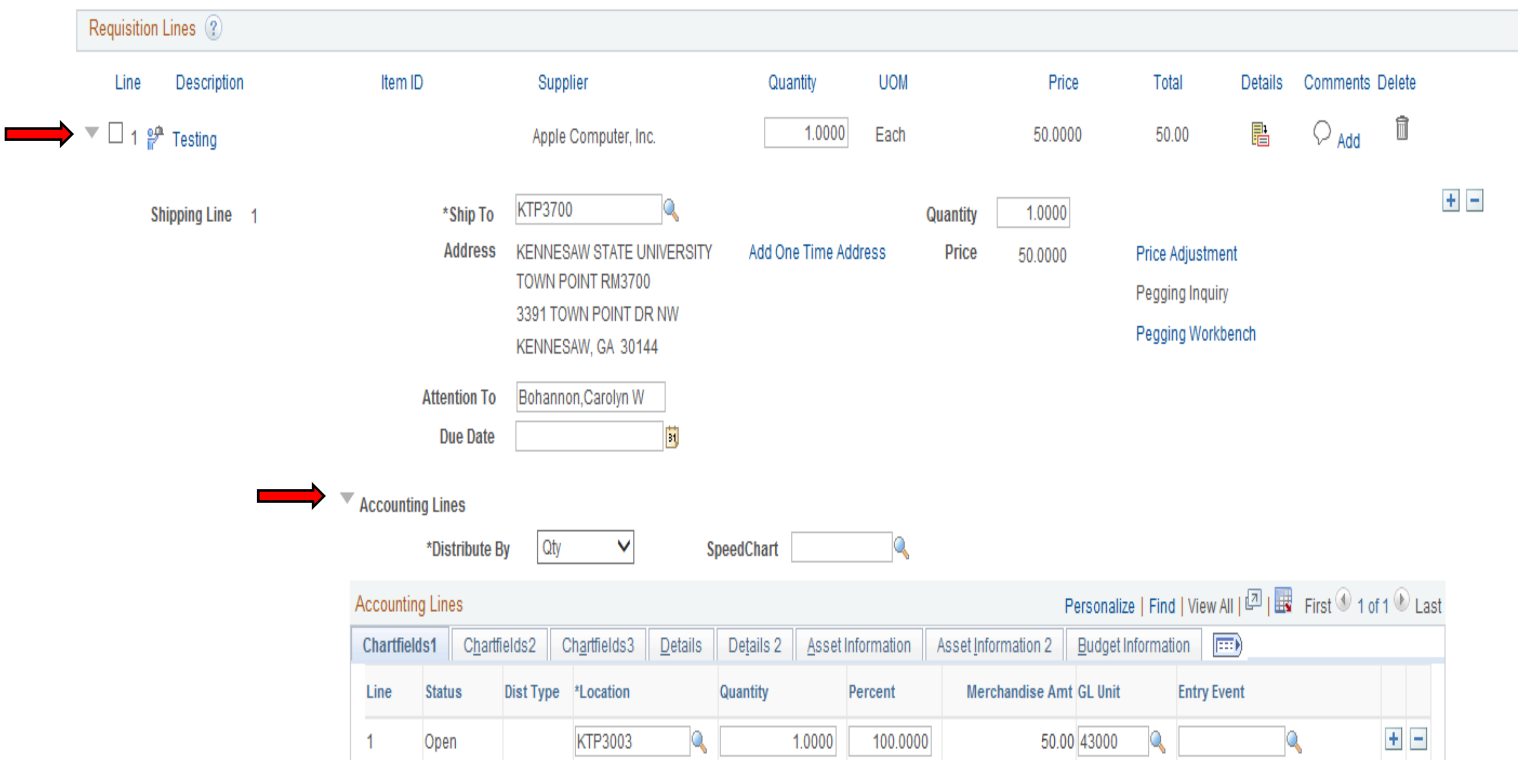
   When using either option for accounting allocation changes:

   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

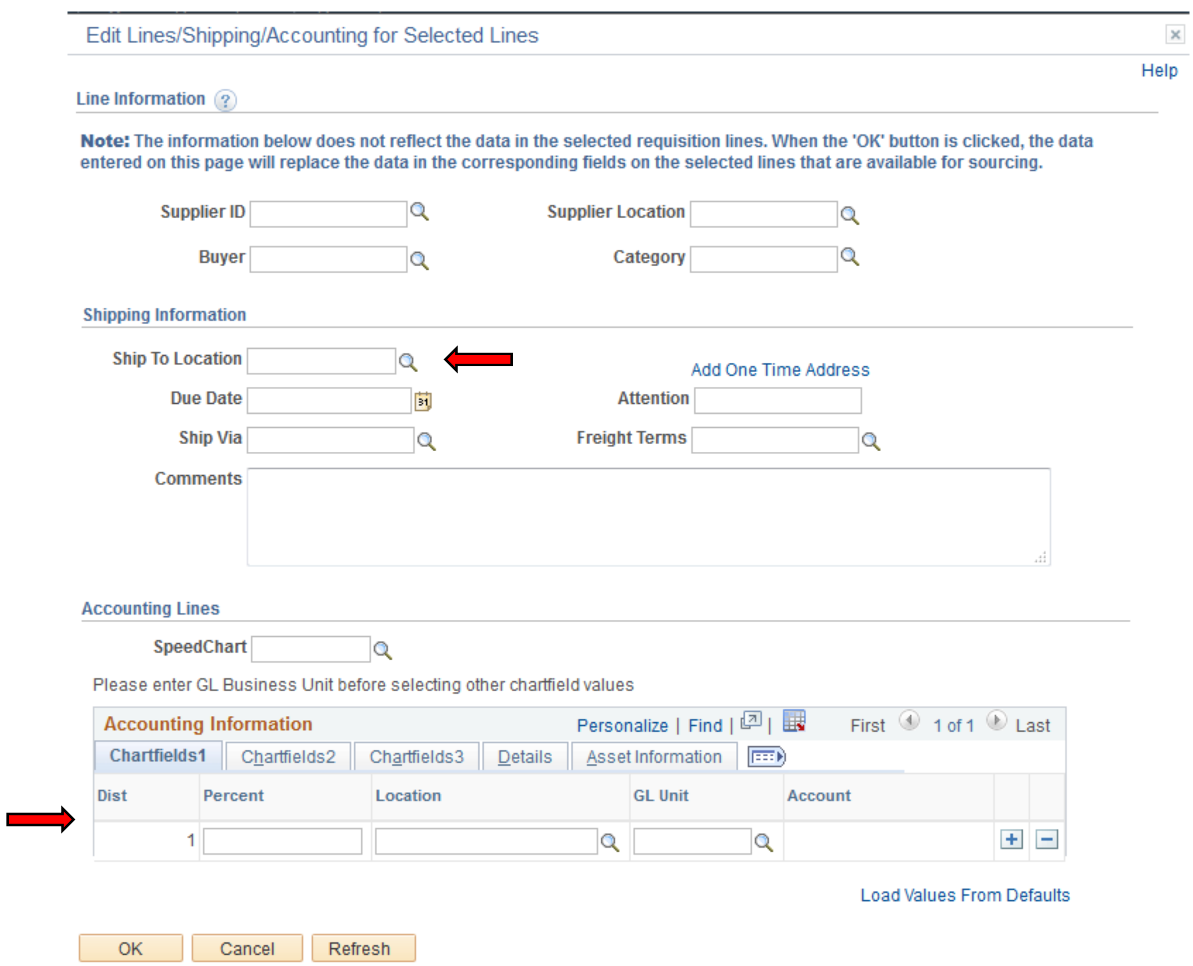


To Update Accounting Allocation on Multiple lines simultaneously:

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

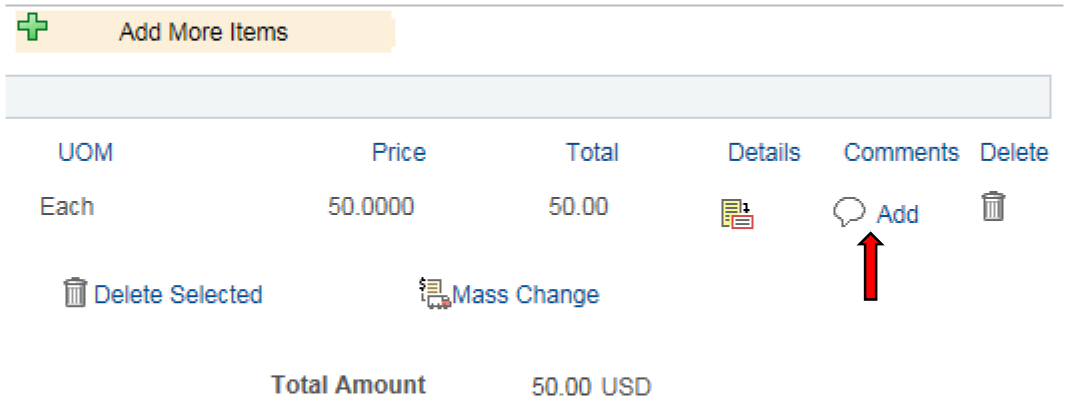
-Update the **Ship To Location** if necessary



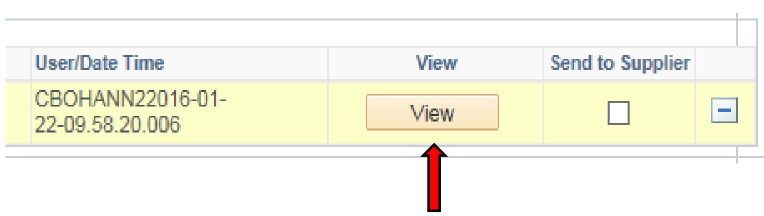
-Click **'OK'**

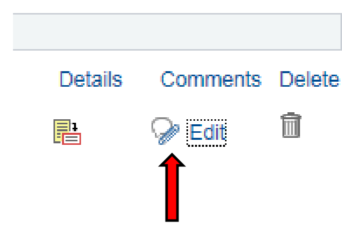
-Click **'Ok'** for **All Distribution Lines** to apply to all selected lines

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

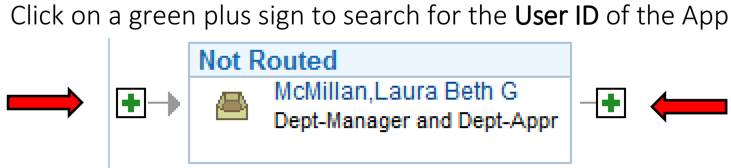


11. Click **'Add Attachments'** and **Browse** for the saved scanned documents
12. Once located, click on your file and click **'Open'**
13. Click **'Upload'** and then **'OK'**
14. To verify you have attached your document(s), you will be able to see a ***'View'*** button on the screen where you added 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





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



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