Title: Purchases $15,000.00 and under

Purchase transactions from $0 to $15,000.00 require one verbal bid or quote. Orders should be awarded to the vendor that provides the best value to the institution. Departments are encouraged to seek a quote or bid from a Historically Underutilized Business (HUB) vendor. For assistance finding a HUB vendor, click here or email HUB@untsystem.edu.

Setting up the Requisition
The requisition must be set up before it can be created, reviewed and submitted. Follow the steps below to set up the requisition.

1. Request bid or quote from vendor.
   **Note:** Price quotes may be taken by phone, by fax, or by email. Prices may also be obtained via a vendor’s website. Ensure vendors send invoices to invoices@UNTSystem.edu. Ensure a reasonable amount of time is given to vendors to respond to a request for bid or quote.
2. Enter EUID and Password.
3. Click Sign In.
4. Click **Main Menu**.

5. Navigate to **Requisition** by clicking on Employee Self-Service>Procurement>Requisition.
6. Verify that the information in the Business Unit and Requester fields is correct.

7. Enter Requisition Name.  
   **Note:** Give the requisition a meaningful name, as it will be visible when using Manage Requisitions.

8. Click magnifying glass next to Supplier field.
9. Enter vendor name into **Name** field.
10. Click **Find**.

11. Select the appropriate **Supplier ID** from **Search Results**—confirming it lists the correct address. **Note:** If the appropriate **Supplier Name** does not appear in the **Search Results**, click **Cancel**. The Supplier and/or applicable address will be added later using the **Suggest New Supplier** feature located on the **Create Requisition** screen.
Note: Requisition Settings screen opens. The Supplier ID and Default Location will automatically be populated into the requisition in the Supplier and Supplier Location fields.

12. Click on the magnifying glass next to Fund Cat.
Note: Account and Alt Acct should remain blank. These fields will be completed later.
13. Select the appropriate **Fund Cat** from the **Look Up Fund Cat** dropdown.

14. Click on the magnifying glass next to **Fund**.
15. Select the appropriate Fund from the Look Up Fund dropdown.

16. Click on the magnifying glass next to Function.
17. Select the appropriate **Function** from the **Look Up Function** dropdown.

18. Click **OK**.

**Note:** The **Create Requisition** screen will open.
Completing the Requisition Using CAP-IT Guidelines
You must ensure each requisition contains all of the necessary components and follows the required process. Use the acronym CAP-IT to complete each requisition correctly. CAP-IT details all a requisition should include. Refer often to the CAP-IT acronym to ensure requisitions are being completed correctly.

**C**ode using category code best describing the purchase.

**A**ttach all documents.

**P**urpose statement should define how purchase will benefit the institution.

**I**nformation in the Justification Comments must include: (See table below).

**T**rack order using **Manage Requisitions**.

<table>
<thead>
<tr>
<th>Justification Comments</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td>Item</td>
</tr>
<tr>
<td>Required</td>
<td>Department contact</td>
</tr>
<tr>
<td>Required</td>
<td>Vendor contact</td>
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<tr>
<td>Required</td>
<td>Purpose</td>
</tr>
<tr>
<td>Required</td>
<td>Email Address</td>
</tr>
<tr>
<td>Required</td>
<td>Procurement Method</td>
</tr>
<tr>
<td>Required</td>
<td>Service Date</td>
</tr>
</tbody>
</table>

### Supporting Documentation
- If applicable: HSP Form [If purchase is over 85k (or has the potential to go over 85k with change orders).]
- If applicable: Quotes [Attach all quotes]
- If applicable: Contract [If this purchase is made off an existing contract, attach copy of contract]
- If applicable: Previous PO number [What was the previous PO number? This helps with reporting]
- If applicable: Proprietary/Sole Source form [Must have VP or dept chair signature]
- If applicable: Request for Solicitation form [Attach for formal solicitations]
- If applicable: Conflict of Interest form [Attach when reporting COI]
- If applicable: Emails [Additional information on purchase/contract]
Creating the Requisition
To create the requisition, follow the steps below before moving on to the next phase of reviewing requisition details.

1. Click **New Requisition** under the ePro Services section.

2. Type the line item description from the price bid or quote received from the vendor in the **Goods/Service Description** field.
   **Note:** Descriptions should be concise, but complete and should include the part number, catalog number, or model number if available, along with a detailed description.
3. Type the number of items in **Quantity** field.

![Image of Create Requisition form with Quantity field highlighted]

4. Click the magnifying glass next to the **Unit of Measure** field.  
   **Note:** **Unit of Measure** can be typed directly in the field without using the lookup feature.

![Image of Create Requisition form with Unit of Measure field highlighted]
5. Select the appropriate **Unit of Measure** from **Look Up Unit of Measure** dropdown.

6. Enter the bid or quote amount received from the vendor in the **Amount** field.
7. Click on the magnifying glass next to the **Category** field.

8. Click on the dropdown arrow next to **Category** to open **Search By** options.
9. Select **Description** from the **Search By** dropdown menu.
10. Type a word to search in the empty field next to **Description**.
    **Note**: A partial word can be used. Do not use multiple words. If no word is entered, the entire **Category** or **Description** list will be available to view in the dropdown.

![Look Up Category](image)

11. Click **Find**.

![Look Up Category](image)

12. Click on the appropriate **Category** based on the **Description** field.
    **Note**: Select the category code that best describes the purchase. Accuracy is important as **Category** drives **Account** and **Alt Acct** expenditure codes. Choosing the correct **Category** also allows special approvers to be automatically inserted into the approval workflow.

![Look Up Category](image)
13. Click on **Suggest New Supplier** if **Supplier ID** and **Supplier Name** are not completed. **Note**: Skip to step 16 if a **Suggested Supplier** is not needed.

![Image of the Suggest New Supplier screen]

14. Enter **Supplier Name**, **Contact Name**, **Address Information**, **Full Phone Number** and **Comments** on the **Suggested Supplier** screen. **Note**: Complete all fields indicated above, as you will be unable to return to edit or add Suggested Supplier information after clicking **OK**. In addition, you should obtain a W-9 from the Supplier that should be attached to the requisition.

![Image of the Suggested Supplier screen]
15. Click OK.

**Note:** The Create Requisition screen will be updated with the Suggested Supplier noted. The Supplier ID and Supplier Name will continue to be blank.
16. Enter **Quote Number**.

**Note**: If a quote number is not available and the quote is from a website, provide site address. If quote received via phone, fax or email, provide the name of person who provided quote.

17. Enter **Quote Date** by clicking on calendar icon.
18. Select the date the quote was received.

19. Enter **Beginning Date** by clicking on calendar icon.
20. Select the appropriate date based on whether ordering Goods or Services. **Note:** For Goods, select the date the quote will expire. For Services, select the date when the service is to begin.

21. Enter the **Date of Completion** by clicking on the calendar icon.
22. Select the appropriate date based on whether ordering Goods or Services.  
**Note:** For Goods, select the ‘deliver by’ date. For Services, select the date when the task should be completed. Normal business practice allows a 30 day turnaround for vendors.

23. Type any necessary information in the **Additional Information** field.
24. Click **Add to Cart**.  
**Note:** To send the information you typed in the **Additional Information** field to the Supplier, Receipt, or Voucher, check the appropriate box below the **Additional Information** field.
25. Repeat steps 2-12 and 16-24 for each item to be purchased from this Supplier. **Note**: You must repeat steps 13-15 for each item to be purchased from the Suggested Supplier. Create a new Requisition if a different supplier is to be used. Number of lines in the order will be visible beside the Shopping Cart icon located next to Checkout.

26. Click Checkout when order is complete.
Reviewing Requisition Details
Requisitions must be reviewed before submission. Follow the steps below to ensure the requisition is correct before proceeding.

1. Review the **Requisition Line** items on the **Checkout – Review and Submit** screen to ensure the information is correct and complete.
   **Note**: Click on **Add More Items** if additional line items need to be added. This will return you back to step 2 of **Creating a Requisition**.

2. Click the **Comment** icon or **Add** in the **Requisition Lines** section.
   **Note**: Comments and attachments only need to be completed for Line 1 unless special instructions are needed for other line items.
3. Enter comment in the **Comments** field within the **Line Comment** section. **Note**: Line comment is specific to the line item and is different from the **Requisition Comment** on the **Checkout – Review and Submit** screen. If you need to send the information you typed in the **Comments** field to the Supplier, Receipt, or Voucher, check the appropriate box below the **Comments** field.

4. Click **Add Attachments**. **Note**: Ensure all applicable documents are attached. Attach Supplier W-9 for **Suggested Suppliers**.

5. Click **Browse** in the **File Attachment** box.
6. Select file to upload from browser window.
7. Click Open.

8. Click Upload in File Attachment box.
9. Confirm the file was uploaded by verifying the file is showing in the Attachments section.
10. Repeat steps 4-9 for each file that needs to be uploaded.
   **Note:** Attached files can be removed by the individual that attached them by clicking on the minus sign next to the attachment that needs to be removed in the Attachments section.
11. Click OK.
12. Click the line details icon 🔄 when creating a requisition for a blanket order with a quantity of 1. **Note:** If you are not creating a requisition for a blanket order, skip to step 15.

13. Select the box next to **Amount Only** on the **Line Details** screen.
14. Click **OK** at the bottom of the screen.
15. Scroll to the **Requisition Comments and Attachments** section at the bottom of the screen.

16. Click **Add more Comments and Attachments** to use the Standard Comments feature.
17. Click **Use Standard Comments**.

18. Click on the magnifying glass next to the **Comment Type** field.

19. Select the appropriate **Standard Comment Type** from the **Look Up Comment Type** dropdown.
20. Click on the magnifying glass next to the **Comment ID** field.

![Image of the magnifying glass next to the Comment ID field](image1.png)

21. Select the appropriate **Standard Comment ID** from the **Look Up Comment ID** dropdown.

![Image of the Look Up Comment ID dropdown](image2.png)

22. Click **OK**.

![Image of the OK button being clicked](image3.png)
**Note:** The available comment options will be displayed in the **Standard Comments** section.

23. Click the box next to the appropriate standard comment option to make your selection.
24. Click **OK**.
25. Recall the CAP-IT guidelines when providing detailed information in the **Standard Comments** box, which is now populated with helpful comment prompts.  
**Note**: The items listed in the table below require additional information be provided in the **Requisition Comments and Attachments** section of the requisition. See **Procurement Guide** for additional instructions.

<table>
<thead>
<tr>
<th>Advertisements</th>
<th>Animals</th>
<th>Blanket Purchase Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branding/Logo Items</td>
<td>Contributions</td>
<td>Controlled Items</td>
</tr>
<tr>
<td>Controlled Substances</td>
<td>Direct Publications</td>
<td>Flowers, Floral Arrangements &amp; Plants</td>
</tr>
<tr>
<td>Food and Beverage</td>
<td>Foreign Nationals</td>
<td>Gifts, Gratuities and Honorariums</td>
</tr>
<tr>
<td>Hazardous Materials</td>
<td>Hosted Events</td>
<td>License Fees</td>
</tr>
<tr>
<td>Memberships</td>
<td>Moving Expense/Relocation</td>
<td>Notary Fees</td>
</tr>
<tr>
<td>Prepayments</td>
<td>Promotional Items</td>
<td>Radioactive Materials</td>
</tr>
<tr>
<td>Registration Fees</td>
<td>Sponsorship, Community Service &amp; Community Support</td>
<td>Subscription of Print Materials</td>
</tr>
<tr>
<td>Telecommunication Equipment</td>
<td>Temporary Personnel</td>
<td>Tips</td>
</tr>
<tr>
<td>Training and Development</td>
<td>Vehicles</td>
<td>Visa Fees</td>
</tr>
</tbody>
</table>

26. Click **OK**.
27. Scroll to the Approval Justification section at the bottom of the screen. 

**Note:** A business justification is necessary for every purchase, and should answer these questions as it pertains to the department and the purchase. The comment entered in this section should explain

- Why this purchase is being made?
- What is the purpose of the purchase?
- Who in the department is this purchase for?

28. Enter Approval Justification comments that meet the defined criteria, and any other information that may be needed by the requisition approver.
29. Click **Save Before Submit** at the bottom of the screen.
30. Click the Telephone icon beside the **Comment** icon to complete the **Bid Tab**, if applicable.  
**Note:** **Bid Tab** only needs to be completed for Line 1.

31. Click on the magnifying glass next to the **Supplier ID** field.
32. Skip to step 37.

**Note:** If you are using a **Suggested Supplier** skip to step 33.
33. Click the link labeled **New Vendor?**.
34. Enter information for the new vendor in the fields that follow, including **Name 1**, **Address**, **Phone Type**, **Contact Name**, **Phone**, and **Amount**.
35. Click **OK**.
36. Skip to step 41.
37. Enter Supplier name in the **Name 1** field.
38. Click **Look Up**.
39. Select the appropriate **Supplier ID** from **Search Results** – confirming it lists the correct **Postal Code**.

   **Note**: If the appropriate **Name 1** does not appear in the **Search Results**, click **Cancel**. Enter **Name** and **Address** on the **Bid Tab** screen.

40. Enter **Contact Name** and **Phone**.

41. Enter the bid or quote amount received from vendor in the **Amount** field.
42. Click on + to add a new bid, if necessary.
43. Repeat steps 31 - 42 for each bid.
44. Click the box next to Bid Awarded as applicable.
   **Note:** Supplier Type automatically populates if identified as a HUB supplier.
45. Click OK.
46. Click on the triangle icon next to Accounting Lines.

47. Review expense detail for accuracy in Chartfields 1 and Chartfields 2 in the Accounting Lines section by clicking on the appropriate tab.

48. Make changes as needed to ensure accuracy of expenditure codes.

**Note:** Do not change Account or Alt Acct here. These fields are controlled by the Category code. Make those changes at the level step. Also, once the requisition is approved you will no longer be able to make changes to the Accounting Lines.
49. Follow steps 50-52 to split the expense between multiple funding sources. If you do not need to do this, skip to step 1 in the section Reviewing Budget and Approvals and Submitting the Requisition.

50. Click on the blue plus sign at the end of Chartfields 1.

51. Distribute funding based on the quantity or percentage of the line amount.

52. Click on the Chartfields 2 tab.

53. Make changes to the newly created distribution lines, as needed.
Reviewing Budget and Approvals and Submitting the Requisition

Requisition Budget and Approvals must be reviewed before submission. Follow the steps below to ensure the requisition is correct before submitting.

1. Click **Pre-Check Budget** at the bottom of the screen to conduct a pre-budget check, which verifies the availability of funds without encumbering the funds. **Note:** If your requisition does not pass the **Pre-Check Budget**, contact the budget office, if your requisition does pass, move on to step 2.

2. Click **Check Budget** to conduct an official budget check, and encumber the necessary funds.

3. Click **Preview Approvals**.
4. Review the **Preview Approvals** screen to ensure the requisition will be routed to the correct Approver for **UNTS Department Approval**.

   **Note:** If the requisition is set to route to the correct Approver, move on to step 13. If the requisition is not set to route to the correct Approver, move to step 5 to ad hoc to the appropriate Approver/Reviewer.

5. Click the green plus symbol  to add an Approver.

   **Note:** You may add an Approver/Reviewer to the front or end of the workflow by clicking the  before or after the existing Approver.

6. Click on the magnifying glass beside the blank **User ID** field.
7. Enter a full or partial name (Last Name, First Name) into the Name field.
8. Click Search.

9. Select the appropriate Name or User ID for the Approver/Reviewer you want to insert.

10. Click Insert.
   Note: If you would like to insert someone as a Reviewer of the requisition instead of as an Approver, select the Reviewer option.
11. Click **Apply Approval Changes**.
12. Repeat steps 4-11 for each additional Approver or Reviewer you need to add.

13. Click **Return**.
14. Click Submit.
Note: The **Confirmation** screen will open.

![Confirmation Screen](image)

**Note:** The **Manage Requisitions** feature in EIS will allow you to
- track the requisition process using the **Request Lifespan**,  
- edit the requisition,  
- cancel the requisition,  
- re-open the requisition,  
- complete **Desktop Receiving**, and  
- complete a change request.

For instructions on using the **Manage Requisitions** feature in EIS [click here](#).