

SOP #: 4.2.3.1	Area: Purchasing
Title: Purchases Over \$50,000.00	Effective Date: 03-01-2016
Version #: 1.0	Revision Date: 02-01-2023
Approval Date: 02-27-2016	Review Date: N/A

Title: Purchases Over \$50,000.00


Purchase transactions over \$50,000.00 require formal bids. UNT System Procurement Services is responsible for soliciting formal bids once an approved requisition, with a Request for Formal Solicitation form attached, is received in good order.

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. Complete [Request for Formal Solicitation](#) form, providing the scope of work and product/service specifications.
2. Enter **EUID** and **Password**.
3. Click **Sign In**.

UNIVERSITY OF NORTH TEXAS SYSTEM



Enterprise Information System

The Enterprise Information System is the primary administrative information resource for the University of North Texas System.

This system is the property of the University of North Texas System and your use of this resource constitutes an agreement to abide by relevant federal and state laws and institutional policies. Unauthorized use of this system is prohibited. Violations can result in penalties and criminal prosecution. Usage may be subject to security testing and monitoring. Users have no expectation of privacy except as otherwise provided by applicable privacy laws.

System Login

EUID (required)

Password (required)

[Sign In](#)

Trouble logging in?

[Activate my account](#)

[What's my EUID?](#)

[Reset my password](#)

Scheduled Maintenance

Service may be interrupted during these regular maintenance times:

- Tuesday 7:00 - 9:30 pm
- Thursday 7:00 - 9:30 pm
- Saturday 7:00 pm to noon Sunday

Web Browsers & Settings

Enterprise Information System (EIS) currently supports the following Web browsers and versions:

- Google Chrome 24
- Firefox 17
- Internet Explorer 11, 10, 9, and 8
- Safari 6

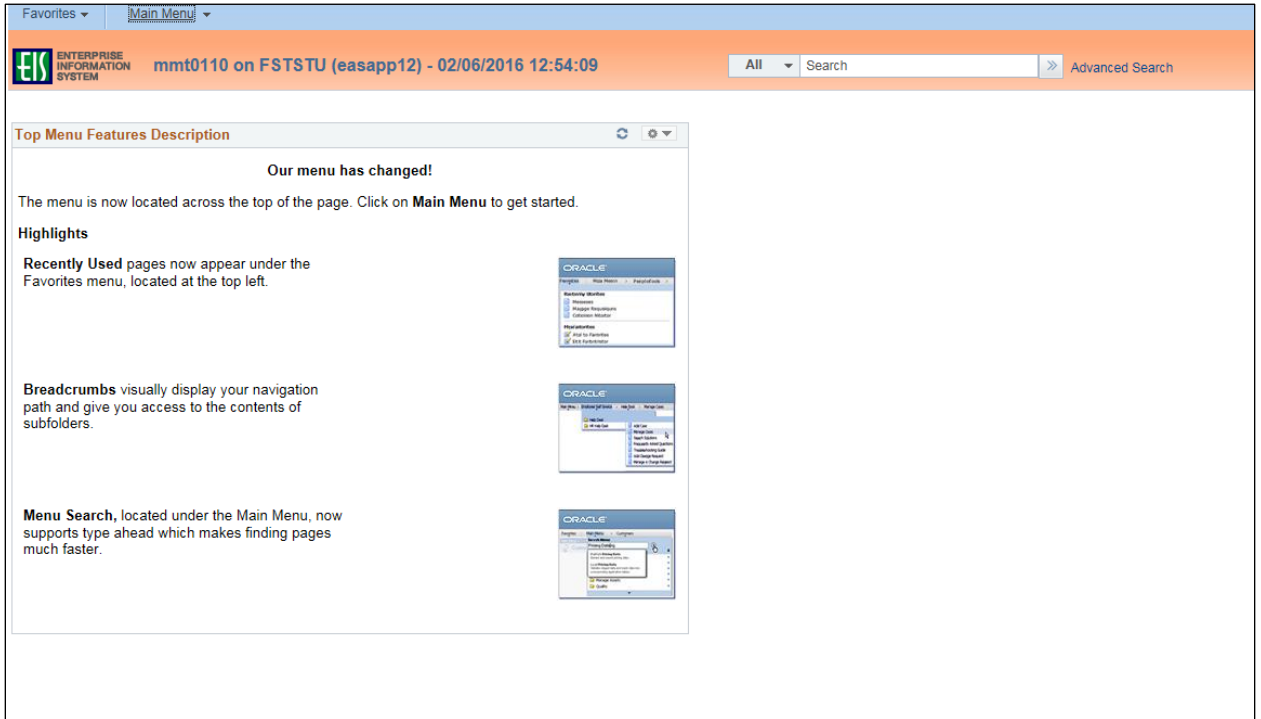
Note: Internet Explorer's Compatibility Mode is unsupported in EIS. Turn off this feature in Internet Explorer under Tools > Compatibility Mode Settings.

To use the Enterprise Information System, set your Web browser to allow JavaScript, accept cookies, and turn off popup blocking.

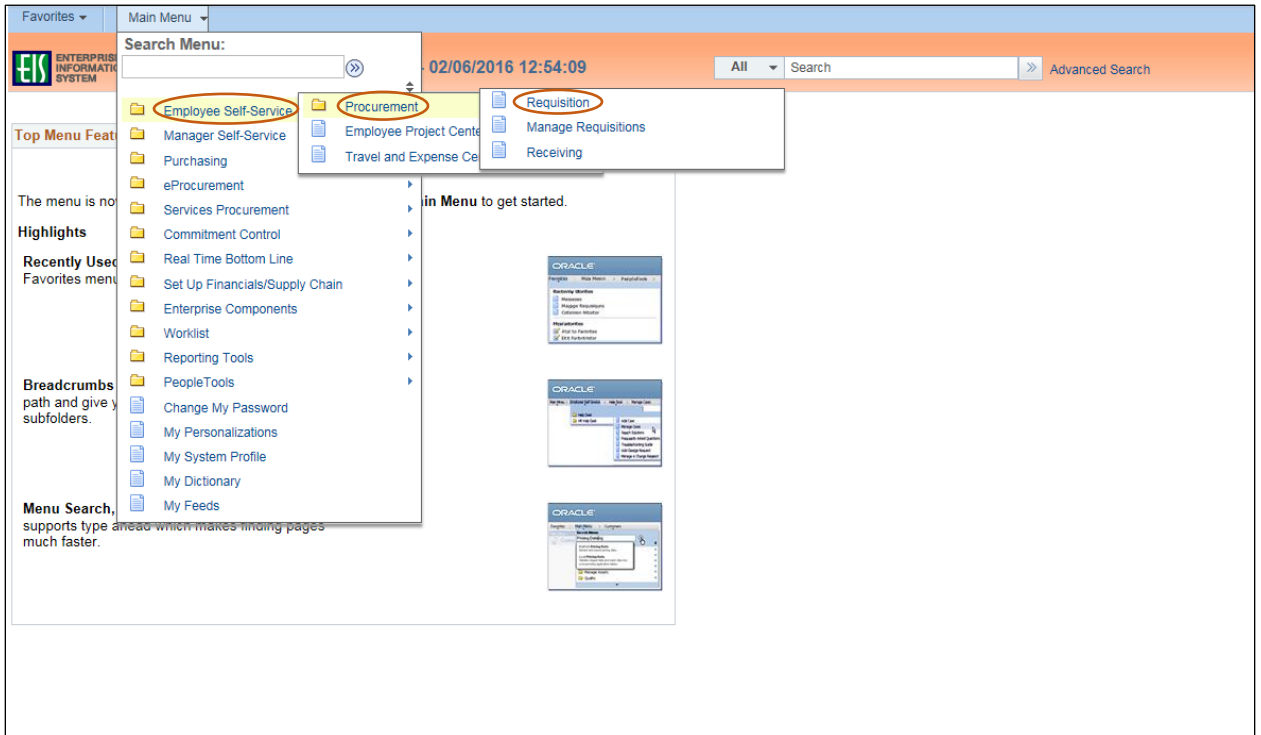
Some documents inside EIS are in PDF format and require the free [Adobe Reader](#) software to open.

[State of Texas](#) • [Statewide Search](#) • [Texas Homeland Security](#) • [Fraud Reporting](#) • [Public Information Act](#) • [Online Institutional Resumes](#)
[University of North Texas](#) • [UNT Health Science Center](#) • [University of North Texas Dallas](#) • [UNT Dallas College of Law](#)
 ©2014 [University of North Texas System](#) • Site changes to [System Portal Administration](#) • Last modified August 12, 2014

4. Click **Main Menu**.



5. Navigate to **Requisition** by clicking on Employee Self-Service>Procurement>Requisition.



- Verify that the information in the **Business Unit** and **Requester** fields is correct.
Note: Supplier information should not be completed as the vendor will be selected based on the formal bid process conducted by Procurement Services.

Requisition Settings

Business Unit: SY769 Univ. of North Texas System Requisition Name:

*Requester: E92200 Business Services-Gen Priority: Medium

*Currency: USD

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Supplier: Category:

Supplier Location: Unit of Measure:

Buyer:

Shipping Defaults

Ship To: BSCA 400 Add One Time Address

Due Date: Attention:

Distribution Defaults

SpeedChart:

Accounting Defaults

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000					

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

Requisition Settings

Business Unit: SY769 Univ. of North Texas System Requisition Name: Pipe Organ for Dr. Tunner

*Requester: E92200 Business Services-Gen Priority: Medium

*Currency: USD

- Click on the magnifying glass next to **Fund Cat**.
Note: **Account** and **Alt Acct** should remain blank. These fields will be completed later.

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000	<input type="text"/>				

9. Select the appropriate **Fund Cat** from the **Look Up Fund Cat** dropdown.

The screenshot shows the 'Requisition Settings' page in the EIS system. A 'Look Up Fund Cat' dialog box is open, displaying a list of Fund Categories. The 'Fund Cat' field in the 'Accounting Defaults' table is highlighted with a red circle.

Fund Category	Description
105	Educational & General
120	Auxiliary
200	Designated Operating-Managed
202	Designated Operating-General
207	Quasi Endowment Spendable
250	Unrestricted Loans
255	Quasi Endow Corpus and Apprec
303	Restr Expendable
307	Restr True Endowment Spendable
309	Restr Quasi Endowment Spendabl
350	Loans and Contracts
353	Rest Quasi Endow Corpus/Apprec
355	Restr True Endowment Apprec
360	Restr Expendable Cap Cntrbt
400	Sponsored Projects-Restr
500	Restr True Endowment Corpus
505	Restr Non-Expend PR Life Inc
700	Net Investment in Plant
720	Retirement of Indebtedness
800	Agency Funds
934	Suspense Fund 34 [CONV ONLY]
993	Suspense NTfund 93 [CONV ONLY]
996	Suspense Unmapped [CONV ONLY]
997	Suspense for Plant [CONV ONLY]
998	Suspense Inactive [CONV ONLY]
999	Suspense [CONV ONLY]

10. Click on the magnifying glass next to **Fund**.

The screenshot shows a close-up of the 'Accounting Defaults' table. The 'Fund' column has a magnifying glass icon next to its input field, which is circled in red.

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000	200				

11. Select the appropriate **Fund** from the **Look Up Fund** dropdown.

The screenshot shows the 'Requisition Settings' page in the EK Enterprise Information System. A 'Look Up Fund' dialog box is open, displaying a list of funds. The 'Fund' field in the 'Accounting Defaults' table is highlighted with a magnifying glass.

Look Up Fund Dialog:

- SetID: SHARE
- Fund begins with: []
- Description begins with: []
- Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results:

Fund	Description
100003	DepOp/QEnd-Majorie Wilson Orgn
100004	DepOp/QEnd-Schl Of Visual Arts
100005	DepOp/QEnd Unrest Gift fund
100007	DepOp/QEnd-Getty Musical Art
100008	DepOp/QEnd-L Murchison Tutor
100009	DepOp/QEnd-Prsdnt's Cmrtstn
100013	DepOp/QEnd-Chas.H.Fleming Trst
100015	DepOp/QEnd-Everett Foundation
100017	DepOp/QEnd-Trip-Onstead Inst
100021	DepOp/QEnd-Rbt Fn Rsv Ser 1999
100022	DepOp/QEnd-Rbt Fn Rsv Ser 199
100023	DepOp/QEnd-Rev Fin Sys Ser 05
100024	DepOp/QEnd-Employee Ben Prg
100025	DepOp/QEnd-Unt Hith Self Ins
100026	DepOp/QEnd-Journalism Pr Endow
100027	DepOp/QEnd- Lone Star Chair
100028	DepOp/QEnd-UNT Quasi Endow
130001	Schol/QEnd-General Univ
130002	Schol/QEnd-Decker
130003	Schol/QEnd-Eagle Escapades
130004	Schol/QEnd-Boeing Elec Tech
130005	Schol/QEnd-H. W. Wilson
130006	Schol/QEnd-Dr James Tad Lott
130007	Schol/QEnd-Pres Council
130008	Schol/QEnd-L Murchison Ugrad
130009	Schol/QEnd-L Murchison Cmht
130010	Schol/QEnd-L Murchison Dance
130011	Schol/QEnd-L Murchison Costum
130012	Schol/QEnd-L Murchison Dramate
130013	Schol/QEnd-Paramount Pictures
130014	Schol/QEnd-Paramount Pic/D&D
130015	Schol/QEnd-Paramount Bio Sci
130016	Schol/QEnd-Paramount Pic/CVAD
130017	Schol/QEnd-Men's Golf
130018	Schol/QEnd-Chancellor Hotel
130019	Schol/QEnd-CMHT--Banf Vintner
130020	Schol/QEnd-Auxiliary Services
130021	Schol/QEnd-L Murchison Grad
130022	Schol/QEnd-TCOM Minority
130023	Schol/QEnd-Grainner

Accounting Defaults Table:

Dist	Percent	Location	GL Unit	Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Proj
1		BSCP 400	SY769			922000	200	830001			

12. Click on the magnifying glass next to **Function**.

The screenshot shows a close-up of the 'Accounting Defaults' table. The 'Function' field is highlighted with a magnifying glass icon, indicating the next step in the process.

13. Select the appropriate **Function** from the **Look Up Function** dropdown.

The screenshot shows the 'Requisition Settings' screen in the EIV Enterprise Information System. A 'Look Up Function' dropdown menu is open, displaying a list of functions. The 'Function' column lists codes like 100, 110, 120, etc., and the 'Description' column lists corresponding names like 'Instruction-General', 'Instruction-Sponsored', 'Practice Direct', etc. The background shows various fields for Business Unit (SY769), Requester (E92200), and Accounting Defaults.

14. Click **OK**.

Note: The **Create Requisition** screen will open.

The screenshot shows the 'Requisition Settings' screen after clicking 'OK'. The 'Requisition Name' field is now populated with 'Pipe Organ for Dr. Tunner'. Other fields like Business Unit (SY769), Requester (E92200), and Accounting Defaults remain visible. The 'Look Up Function' dropdown is no longer 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.

Code using category code best describing the purchase.

Attach all documents.

Purpose statement should define how purchase will benefit the institution.

Information in the Justification Comments must include:

- ✓ Department contact full name, full phone number & email.
- ✓ Any special requirements or handling requests (ex. Where to email order).
- ✓ Service dates and/or date needed.
- ✓ Reference full name and contract number of any Co-operative contracts, if applicable.
- ✓ Note if sole source, proprietary justification, and/or bid tab is included, if applicable.

Track order using **Manage Requisitions**.

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.

The screenshot shows the 'Create Requisition' page in the EIS system. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/06/2016 13:04:35'. The page title is 'Create Requisition'. The 'Request Options' dropdown is set to 'All'. The 'ePro Services' section is expanded, and the 'New Requisition' link is circled in red. Other sections include 'Web', 'Forms', 'Favorites', 'Recently Ordered', and 'External Catalogs'. The 'Recently Ordered' section shows a list of items: 'computer dell optiplex 9020 item 1' and 'Computer, Dell, Optiplex 902... Goods'.

2. Enter the description of the good or service 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.

The screenshot shows the 'New Requisition' form in the EIS system. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/26/2016 13:30:24'. The page title is 'Create Requisition'. The 'Request Options' dropdown is set to 'All'. The 'New Requisition' form is displayed with the following fields: '*Goods/Service Description', 'Quantity', 'Amount', '*Category', 'Supplier ID', 'Supplier Name', 'Quote Number', 'Beginning Date', '*Unit of Measure', '*Currency Code' (set to USD), 'Quote Date', and 'Date of Completion'. There is a 'Suggest New Supplier' button. Below the form is an 'Additional Information' section with a text area and three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Add to Cart' button is at the bottom.

3. Type the number of items in **Quantity** field.

The screenshot shows the 'Create Requisition' page in the EIS system. The 'Quantity' field is highlighted with a red circle. The form includes the following fields and options:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: (highlighted)
- Amount: (empty)
- *Category: (empty)
- Supplier ID: (empty)
- Supplier Name: (empty)
- Quote Number: (empty)
- Beginning Date: (empty)
- *Unit of Measure: (empty)
- *Currency Code: USD
- Quote Date: (empty)
- Date of Completion: (empty)
- Additional Information: (empty)
- Send to Supplier:
- Show at Receipt:
- Show at Voucher:
- Add to Cart: (button)

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.

The screenshot shows the 'Create Requisition' page in the EIS system. The 'Unit of Measure' field is highlighted with a red circle. The 'Quantity' field now contains the number '1'. The form includes the following fields and options:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- *Unit of Measure: (highlighted)
- *Currency Code: USD
- Quote Date: (empty)
- Date of Completion: (empty)
- Additional Information: (empty)
- Send to Supplier:
- Show at Receipt:
- Show at Voucher:
- Add to Cart: (button)

- Select the appropriate **Unit of Measure** from **Look Up Unit of Measure** dropdown.

The screenshot shows the 'Create Requisition' page in the EIS system. The 'New Requisition' form is partially filled with the following details:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- *Unit of Measure: (dropdown menu is open)
- *Currency Code: USD

The 'Look Up Unit of Measure' dropdown menu is open, displaying a list of units of measure. The units listed include: ACR, AMP, AN, AVC, B15, B25, B50, BAG, BBL, BD, BE, BOT, BOX, BRL, BSD, C, CA, CAN, CCF, CCM, CDM, CE, CF, CG, CHN, CL, CM, CMM, CN, CO, CRD, CRT, CS, CTN, CUF, CUI, CUM, CUY, CWT, CYL, D, DAY, and DG. Each unit is accompanied by its full name and a short description.

- Enter an estimated dollar amount for the good or service in the **Amount** field.

The screenshot shows the 'Create Requisition' page in the EIS system. The 'New Requisition' form is partially filled with the following details:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- *Unit of Measure: EA
- *Currency Code: USD

The 'Amount' field is highlighted with a red circle, indicating where the user should enter an estimated dollar amount for the good or service.

7. Click on the magnifying glass next to the **Category** field.

Enterprise Information System (EIK) interface showing the 'Create Requisition' page. The page title is 'mmt0110 on FSTSTU (easapp12) - 02/26/2016 13:30:24'. The page includes a search bar and a 'Request Options' dropdown menu. The main form is titled 'New Requisition' and contains the following fields:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- *Unit of Measure: EA
- Amount: 32,000.00
- *Currency Code: USD
- Category**: (Field circled in red, with a magnifying glass icon next to it)
- Supplier ID: (Field with a magnifying glass icon)
- Supplier Name: (Field with a magnifying glass icon)
- Quote Number: (Field with a question mark icon)
- Beginning Date: (Field with a calendar icon and a question mark icon)
- Quote Date: (Field with a calendar icon)
- Date of Completion: (Field with a calendar icon)

Additional Information section includes checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Add to Cart' button is located at the bottom of the form.

8. Click on the dropdown arrow next to **Category** to open **Search By** options.

Enterprise Information System (EIK) interface showing the 'Look Up Category' page. The page title is 'mmt0110 on FSTSTU (easapp12) - 02/06/2016 15:27:16'. The page includes a search bar and a 'Search Categories' section. The main form is titled 'Look Up Category' and contains the following fields:

- Note: You may either Search or Browse to look up the appropriate category for your special request.
- Search Categories: (Section with a dropdown arrow)
- Search By: Category (Field with a dropdown arrow circled in red)
- Find: (Button)
- Browse Category Tree: (Section with a right-pointing arrow)
- Return: (Button)

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.

Enterprise Information System (EIS) interface showing the 'Look Up Category' page. The breadcrumb trail is: Favorites > Main Menu > Employee Self-Service > Procurement > Requisition. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/06/2016 15:27:16'. The page title is 'Look Up Category'. A note states: 'You may either Search or Browse to look up the appropriate category for your special request.' The 'Search Categories' section has a 'Search By' dropdown set to 'Description' and an empty search input field. A 'Find' button is present. Below this is a 'Browse Category Tree' section with a 'Return' button.

11. Click **Find**.

The same EIS interface as above, but the search results are now displayed. The 'Search By' dropdown is still 'Description', and the search input field contains the word 'Furniture'. The 'Find' button has been clicked. The results section shows a table with one entry: '1 PROCUREMENT' with category code '931-46' and description 'Maintenance - Furniture'. There is a 'Browse Category Tree' section and a 'Return' button below the results.

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.

The same EIS interface as above, but the search results are now displayed. The 'Search By' dropdown is still 'Description', and the search input field contains the word 'Furniture'. The 'Find' button has been clicked. The results section shows a table with one entry: '1 PROCUREMENT' with category code '931-46' and description 'Maintenance - Furniture'. There is a 'Browse Category Tree' section and a 'Return' button below the results.

13. Enter "RFQ" in the **Quote Number** field.

The screenshot shows the 'Create Requisition' page in the EIS system. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The page title is 'Create Requisition'. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/26/2016 13:30:24'. The 'Request Options' dropdown is set to 'All'. The 'New Requisition' section contains the following fields: *Goods/Service Description (Wicks Opus 5268), Quantity (1), *Unit of Measure (EA), Amount (32,000.00), *Currency Code (USD), *Category (931-46), Supplier ID, Supplier Name, Quote Number (empty), and Beginning Date (empty). There are also fields for Quote Date and Date of Completion. Below the fields is an 'Additional Information' section with a text area and three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Add to Cart' button is at the bottom.

14. Enter **Beginning Date** by clicking on calendar icon.

This screenshot is identical to the previous one, but with the 'Beginning Date' field highlighted by a red circle. The 'Quote Number' field now contains the text 'RFQ'. The 'Additional Information' section and 'Add to Cart' button are also visible.

15. Select the appropriate date based on whether ordering Goods or Services.

The screenshot shows the 'Create Requisition' page in the EIS system. The 'New Requisition' form is partially filled with the following details:

- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- Amount: 32,000.00
- *Unit of Measure: EA
- *Currency Code: USD
- *Category: 931-46
- Quote Number: RFQ
- Beginning Date: [calendar icon]
- Date of Completion: [calendar icon]

A calendar pop-up is displayed over the 'Date of Completion' field, showing the month of February 2016. The date 26 is highlighted in blue. The calendar includes a header with days of the week (S, M, T, W, T, F, S) and a grid of dates from 1 to 29.

16. Enter the **Date of Completion** by clicking on the calendar icon.

The screenshot shows the 'Create Requisition' page with the 'Date of Completion' field highlighted by a red circle. The form details are the same as in the previous screenshot, but the 'Date of Completion' field now contains the date 02/01/2016. The 'Date of Completion' field has a calendar icon next to it, which was the focus of the instruction.

17. 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. Formal bids can take from 15 to 90 days depending on dollar amount.

The screenshot shows the 'Create Requisition' page. The 'New Requisition' section contains the following fields:

- *Goods/Service: Wicks Opus 5268
- Description: [empty]
- Quantity: 1
- Amount: 32,000.00
- *Category: 931-46
- Supplier ID: [empty]
- Supplier Name: [empty]
- Quote Number: RFQ
- Beginning Date: 02/01/2016
- *Unit of Measure: EA
- *Currency Code: USD
- Quote Date: [empty]
- Date of Completion: [empty]

The 'Additional Information' field is empty. There are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Add to Cart' button is highlighted with a red circle.

18. Type any necessary information in the **Additional Information** field.
 19. Click **Add to Cart**.
 20. Repeat steps 2-19 for each item to be purchased.

The screenshot shows the 'Create Requisition' page with the following changes from the previous screenshot:

- Date of Completion: 02/29/2016
- The 'Add to Cart' button is circled in red.

Note: Number of lines in the order will be visible beside the **Shopping Cart** icon located next to **Checkout**.

21. Click **Checkout** when order is complete.


The screenshot shows the 'Create Requisition' page in an Enterprise Information System. The breadcrumb trail is: Favorites > Main Menu > Employee Self-Service > Procurement > Requisition. The user is logged in as 'mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14'. The page title is 'Create Requisition'. The navigation bar includes 'Home', 'My Preferences', 'Requisition Settings', '0 Lines' (shopping cart icon), and 'Checkout' (circled in red). The main content area is titled 'New Requisition' and contains the following fields:

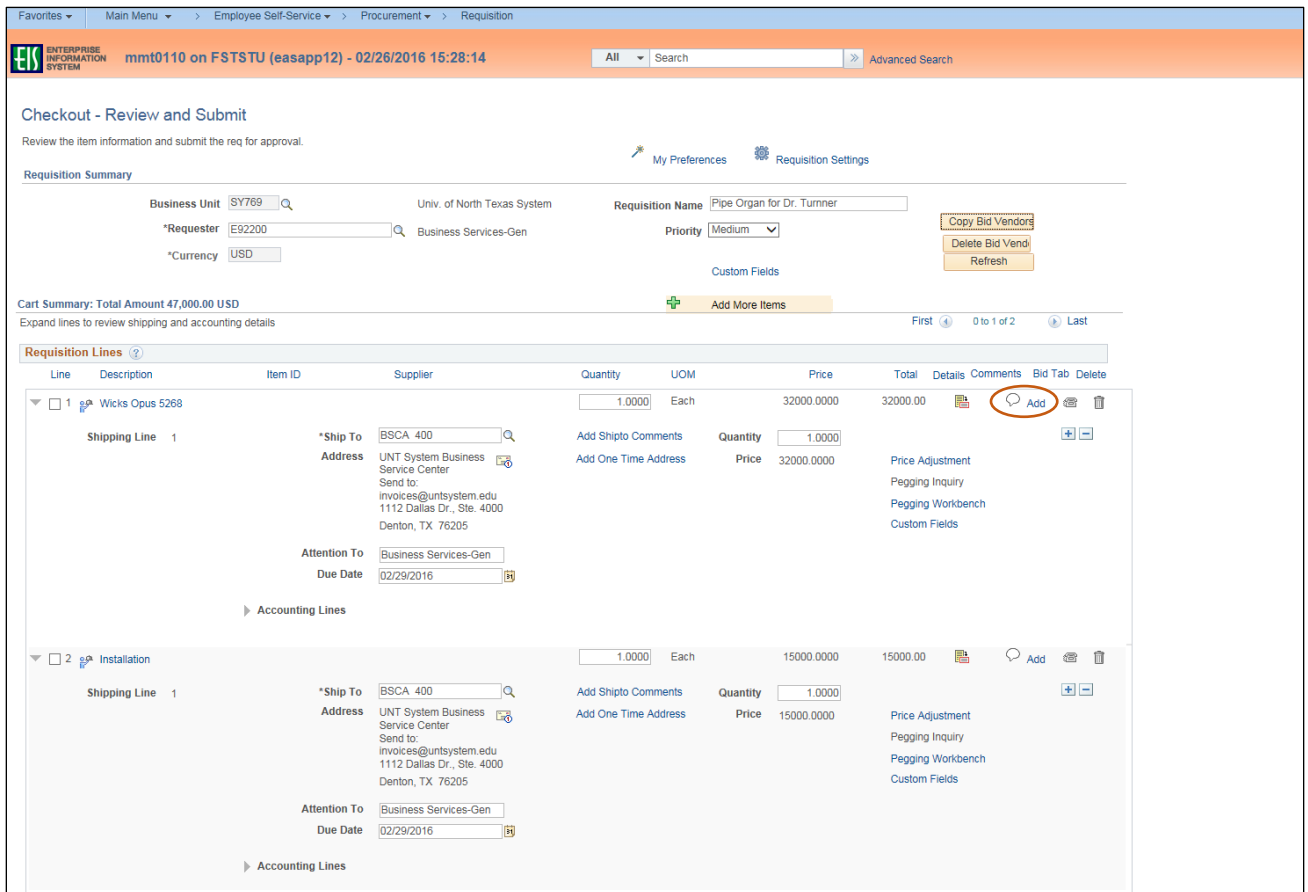
- *Goods/Service Description: Wicks Opus 5268
- Quantity: 1
- *Unit of Measure: EA
- Amount: 32,000.00
- *Currency Code: USD
- *Category: 931-46
- Supplier ID: [empty]
- Supplier Name: [empty]
- Quote Number: RFQ
- Beginning Date: 02/01/2016
- Quote Date: [empty]
- Date of Completion: 02/29/2016

Additional Information section includes a text area and three checkboxes: Send to Supplier, Show at Receipt, and Show at Voucher. An 'Add to Cart' button is located at the bottom.

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.





Enterprise Information System
mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14

Checkout - Review and Submit
Review the item information and submit the req for approval.

Requisition Summary

Business Unit: SY769 Univ. of North Texas System
*Requester: E92200 Business Services-Gen
*Currency: USD
Requisition Name: Pipe Organ for Dr. Turner
Priority: Medium
Buttons: Copy Bid Vendor, Delete Bid Vendor, Refresh

Cart Summary: Total Amount 47,000.00 USD
Expand lines to review shipping and accounting details

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5268			1.0000	Each	32000.0000	32000.00		 Add		
Shipping Line 1											
			*Ship To: BSCA 400	Add Shipto Comments	Quantity: 1.0000						
			Address: UNT System Business Service Center	Add One Time Address	Price: 32000.0000						
			Send to: invoices@untssystem.edu								
			1112 Dallas Dr., Ste. 4000								
			Denton, TX 76205								
			Attention To: Business Services-Gen								
			Due Date: 02/29/2016								
Accounting Lines											
2	Installation			1.0000	Each	15000.0000	15000.00		 Add		
Shipping Line 1											
			*Ship To: BSCA 400	Add Shipto Comments	Quantity: 1.0000						
			Address: UNT System Business Service Center	Add One Time Address	Price: 15000.0000						
			Send to: invoices@untssystem.edu								
			1112 Dallas Dr., Ste. 4000								
			Denton, TX 76205								
			Attention To: Business Services-Gen								
			Due Date: 02/29/2016								
Accounting Lines											

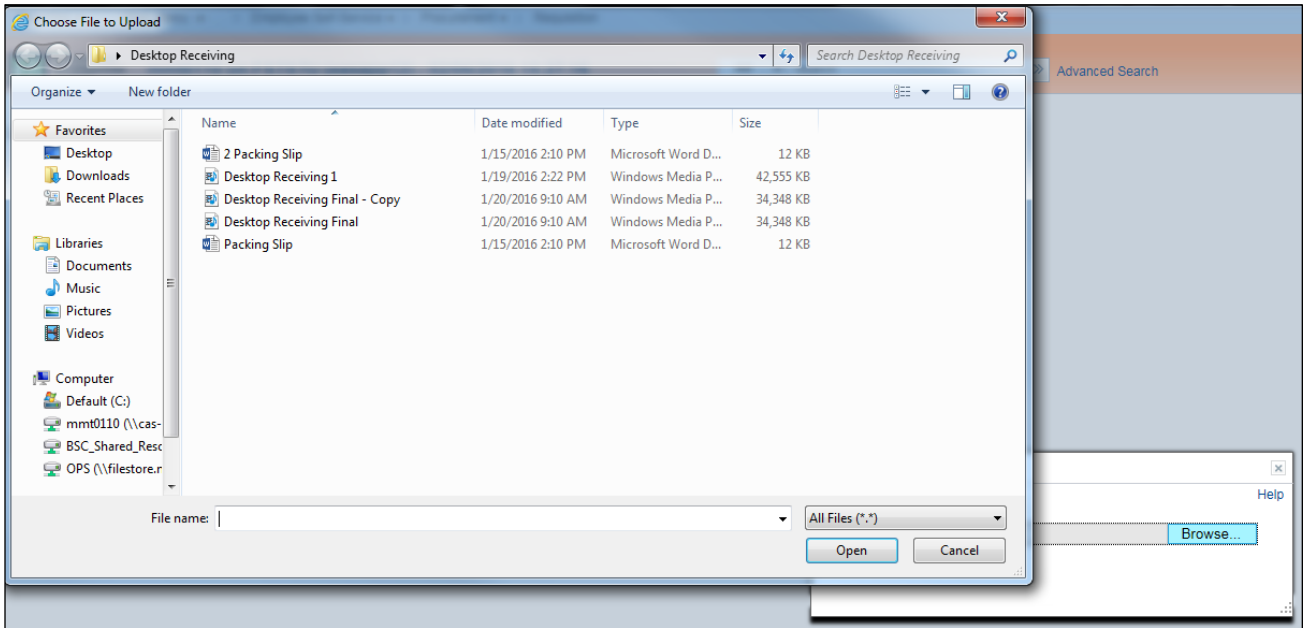
3. Enter comment in the **Comments** field within the **Line Comment** section.
Note: Line comment is specific to the line item and is different from the **Requisition Comment** on the **Checkout – Review and Submit** screen.
4. Click **Add Attachments** to attach the required [Request for Formal Solicitation](#) form.
Note: Ensure all applicable documents are attached.

The screenshot shows the 'Line Comment' form in the EIS system. The breadcrumb trail is 'Favorites > Main Menu > Employee Self-Service > Procurement > Requisition'. The header includes the EIS logo, the text 'mmt0110 on FSTSTU (easapp12) - 02/06/2016 15:27:16', and a search bar. The form displays 'Business Unit SY769', 'Requisition Date 02/06/2016', and 'Status Open'. Under 'Line 1', there is a 'Comments' section with a 'Find' button and navigation arrows. A text area for entering a comment is visible, along with a 'Use Standard Comments' link and an 'Entered On:' field. Below the text area are three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Add Attachments' button is present, followed by an 'Attachments' section with a dropdown arrow. At the bottom are 'OK' and 'Cancel' buttons.

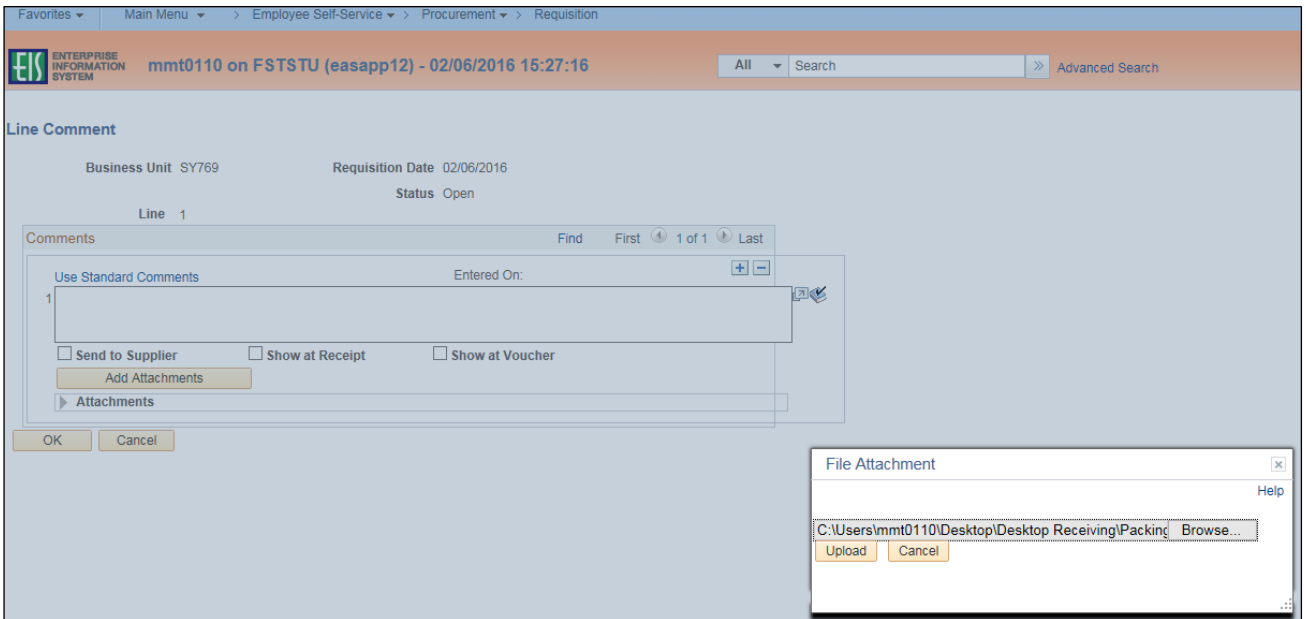
5. Click **Browse** in the **File Attachment** box.

This screenshot is similar to the previous one but includes a 'File Attachment' dialog box. The dialog box has a title bar with a close button, a 'Help' link, and a 'Browse...' button. Below the 'Browse...' button are 'Upload' and 'Cancel' buttons. The background form is dimmed, showing the same 'Line Comment' form as in the previous screenshot.

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**.

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Procurement ▾ > Requisition

EIS ENTERPRISE INFORMATION SYSTEM test_POeProEntry on FSTSTU (easapp12) - 11/23/2015 15:01:08

Line Comment

Business Unit NT752 Requisition Date 11/23/2015
 Status Open

Line 1

Comments Find First 1 of 1 Last
 Entered On: 11/23/2015 3:01:09PM

1


Send to Supplier Show at Receipt Show at Voucher

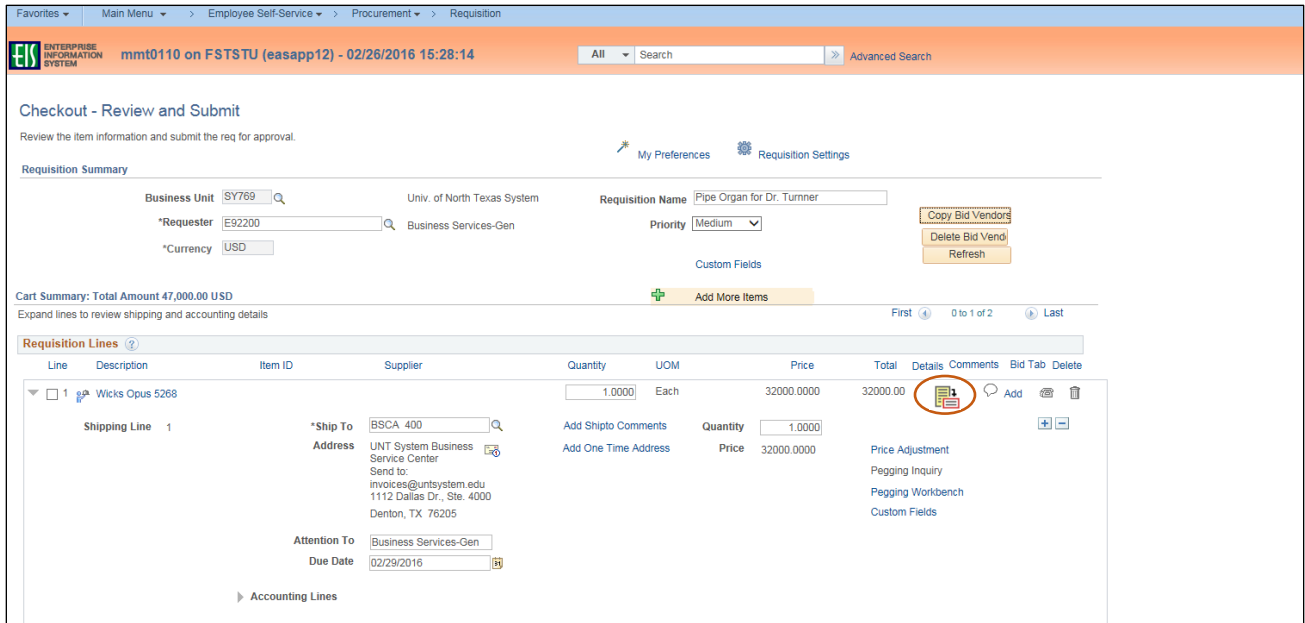
Add Attachments

Attachments

	Attached File	User/Date Time	View	Send to Supplier	
1	Process_4.2.4.1__Vendor_Record_Inactivation.pdf	test_POeProEntry201 5-11-23-15.14.10.822	View	<input type="checkbox"/>	

OK Cancel

12. Click the line details icon  when creating a requisition for a formal bid.



Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit: SY769 Univ. of North Texas System Requisition Name: Pipe Organ for Dr. Turner

*Requester: E92200 Business Services-Gen Priority: Medium


*Currency: USD

Buttons: Copy Bid Vendors, Delete Bid Vendors, Refresh

Cart Summary: Total Amount 47,000.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Shipping Line	Wicks Opus 5268	BSCA 400	1.0000	Each	32000.0000	32000.00				

Shipping Line 1

*Ship To: BSCA 400

Address: UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205

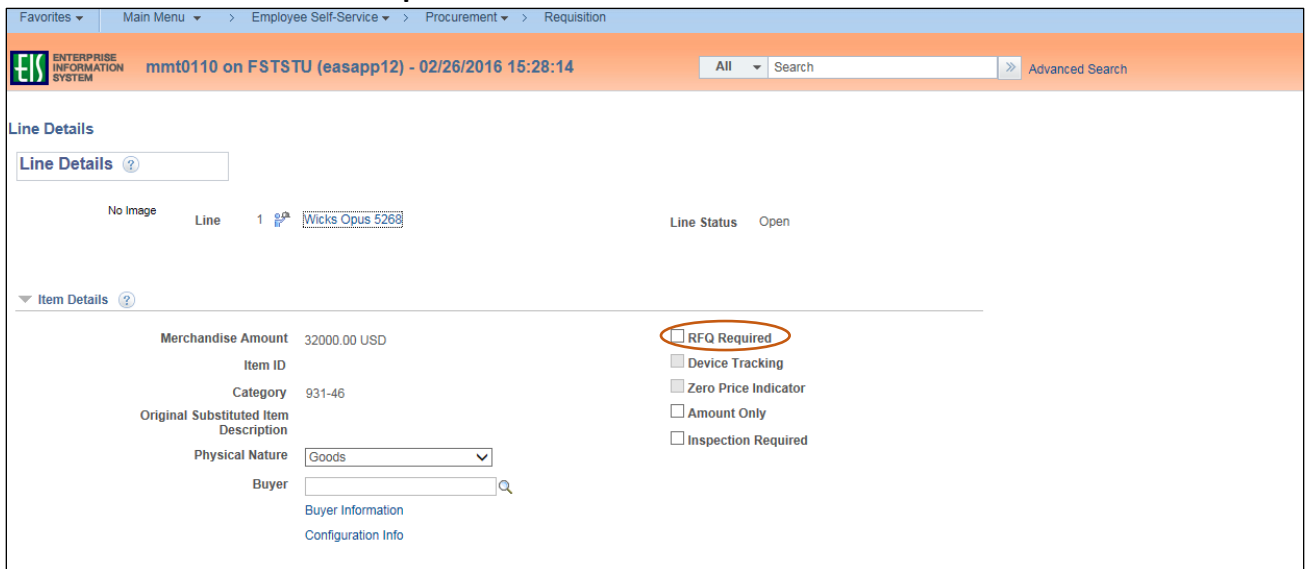
Attention To: Business Services-Gen

Due Date: 02/29/2016

Buttons: Add Shipto Comments, Add One Time Address, Price Adjustment, Pegging Inquiry, Pegging Workbench, Custom Fields

Accounting Lines

13. Select the box next to **RFQ Required** on the **Line Details** screen.



Line Details

Line Details

No Image Line 1 Wicks Opus 5268 Line Status Open

Item Details

Merchandise Amount: 32000.00 USD

Item ID

Category: 931-46

Original Substituted Item Description

Physical Nature: Goods

Buyer


Buttons: Buyer Information, Configuration Info

Item Details Checklist:

- RFQ Required
- Device Tracking
- Zero Price Indicator
- Amount Only
- Inspection Required


14. Click **OK** at the bottom of the screen.
15. Repeat steps 12-14 for each line item.

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Procurement](#) > [Requisition](#)



mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14

[All](#) Search [Advanced Search](#)





Line Details [?](#)

No Image **Line** 1  **Wicks Opus 5268** **Line Status** Open



Item Details [?](#)

Merchandise Amount 32000.00 USD Item ID Category 931-46 Original Substituted Item Description Physical Nature <input type="text" value="Goods"/>	<input checked="" type="checkbox"/> RFQ Required <input type="checkbox"/> Device Tracking <input type="checkbox"/> Zero Price Indicator <input type="checkbox"/> Amount Only <input type="checkbox"/> Inspection Required	Buyer <input type="text"/>  Buyer Information Configuration Info
---	--	--



Contract Information [?](#)

Use Contract if Available
Contract ID  
[Contract Details](#)
Version
Contract Line 
Category Line 

Supplier Information [?](#)

Supplier ID 
Supplier Location 
[Suggest New Supplier](#)
Supplier Item ID
Supplier's Catalog


Manufacturer Information [?](#)

Manufacturer ID 
Manufacturer
Manufacturer's Item ID 
GTIN

Sourcing Controls [?](#)

Consolidate with other Reqs
 Calculate Price
 Override Suggested Supplier

Custom Fields [?](#)

Custom Character 1
Custom Character 2
Custom Date 
Custom Field 1
Custom Field 2
Custom Field 3
Custom Field 4

16. Scroll to the **Requisition Comments and Attachments** section at the bottom of the screen.
17. Click **Add more Comments and Attachments** to use the Standard Comments feature.

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Procurement](#) > [Requisition](#)

ENTERPRISE INFORMATION SYSTEM mmt0110 on F8TSTU (easapp12) - 02/26/2016 15:28:14 All Search [Advanced Search](#)

Checkout - Review and Submit
 Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit: SY769 Univ. of North Texas System Requisition Name: Pipe Organ for Dr. Turner
 *Requester: E92200 Business Services-Gen Priority: Medium
 *Currency: USD

[Copy Bid Vendor](#)
[Delete Bid Vendor](#)
[Refresh](#)

Custom Fields

Cart Summary: Total Amount 47,000.00 USD [Add More Items](#)

Expand lines to review shipping and accounting details First 0 to 1 of 2 Last

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5260			1.0000	Each	32000.0000	32000.00				
<p>Shipping Line 1</p> <p>*Ship To Address: BSCA 400, UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205</p> <p>Attention To: Business Services-Gen, Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
2	Installation			1.0000	Each	15000.0000	15000.00				
<p>Shipping Line 1</p> <p>*Ship To Address: BSCA 400, UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205</p> <p>Attention To: Business Services-Gen, Due Date: 02/29/2016</p> <p>Accounting Lines</p>											

Select All / Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 47,000.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location: BSCA 400
 Address: UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205
 Attention To: Business Services-Gen

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

[Check Budget](#) [Pre-Check Budget](#)

[Submit](#) [Save Before Submit](#) [Add More Items](#) [Preview Approvals](#)

18. Click **Use Standard Comments**.

Comments

Business Unit SY769 Requisition Date 02/06/2016 Status Open

Use Standard Comments Entered On: []

1

Send to Supplier Show at Receipt Show at Voucher

Add Attachments

Attached File	User/Date Time	View	Send to Supplier
1		View	<input type="checkbox"/>

OK Cancel

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

Standard Comments

Search Criteria

Comment Type [] [] Search

Comment ID [] [] Reset

Description []

OK Cancel

20. Select the appropriate **Standard Comment Type** from the **Look Up Comment Type** dropdown.

Look Up Comment Type

SetID SHARE

Standard Comment Type [begins with] []

Description [begins with] []

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-8 of 8 Last

Standard Comment Type	Description
AM	Asset Management
AP	Accounts Payables
CO	Change Order
CR	Central Receiving
PO	Purchase Order/Req Comments
REQ	Template Justification
SUP	Supplier Instructions
T&C	Terms & Conditions

21. Click on the magnifying glass next to the **Comment ID** field.

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: [magnifying glass icon]

Description: [text box]

Buttons: Search, Reset, OK, Cancel

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

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: [magnifying glass icon]

Description: [text box]

Buttons: Search, Reset, OK, Cancel

Look Up Comment ID

SetID: [text box] SHARE: REQ

Standard Comment Type: [dropdown] begins with [text box]

Description: [dropdown] begins with [text box]

Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results

Standard Comment ID	Description
JUST	Req Comments Justification

23. Click **OK**.

Standard Comments

Search Criteria

Comment Type: REQ

Comment ID: JUST

Description: [text box]

Buttons: Search, Reset, OK, Cancel

Note: The available comment options will be displayed in the **Standard Comments** section.

The screenshot shows the 'Standard Comments' section of the EIS system. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Employee Self-Service', 'Procurement', and 'Requisition'. Below this is the EIS logo and the text 'ENTERPRISE INFORMATION SYSTEM' followed by 'mmt0110 on FSTSTU (easapp12) - 02/06/2016 15:27:16'. There is a search bar with 'All' and 'Search' buttons, and an 'Advanced Search' link.

The 'Standard Comments' section is divided into two main areas:

- Search Criteria:** This area contains three input fields: 'Comment Type' (set to 'REQ'), 'Comment ID' (set to 'JUST'), and 'Description'. There are 'Search' and 'Reset' buttons to the right of the input fields.
- Standard Comments:** This area displays a table of standard comments. The table has columns for 'Select', 'Comment Type', 'REQ', and 'Comment ID', 'JUST'. The 'Description' column contains the following text:
Department Contact: Full name, full phone number and email address
Vendor Contact: Full name, full phone number, fax number and email address
Special Instructions: Include any special shipping, payment or deadlines
Attachments: Refer to any attachments such as contracts or quotes
Purpose: Advise how this purchase will be used, what benefit is gained

Below the table, there are two radio buttons: 'Append To Comments' (unselected) and 'Override Comments' (selected). At the bottom, there are 'OK' and 'Cancel' buttons.

24. Click the box next to the appropriate standard comment option to make your selection.

25. Click **OK**.

This screenshot is identical to the one above, but with a red circle around the 'Select' checkbox in the 'Standard Comments' table, indicating that the selection step has been completed.

26. 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.

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

27. Click **OK**.

Enterprise Information System (EIS) interface showing requisition details and comments. The requisition is for 'mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14'. The status is 'Open'. The comments section is active, displaying a 'Use Standard Comments' button and a text area with the following content:

Dept. Contact: Karen James | Contact Phone: 940-555-5555 | Contact Email: karenjames@unt.edu
 Special Instructions: Please email the address above when the order ships
 Attachments: Refer to any attachments such as contracts or quotes
 Business: This purchase will allow Professor Turner to complete the composition of a concert which could result in grants

Options: Send to Supplier, Show at Receipt, Show at Voucher

Buttons: Add Attachments, OK, Cancel

28. 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?

29. Enter **Approval Justification** comments that meet the defined criteria, and any other information that may be needed by the requisition approver.

The screenshot shows a web interface for requisition management. At the top, there is a section titled "Requisition Comments and Attachments". Below this title, there is a text area for "Enter requisition comments" containing instructions: "Special Instructions: Please email the address above when the order ships", "Attachments: Refer to any attachments such as contracts or quotes", and "Purpose: This purchase will allow Professor Turnner to complete the composition of a concert which could result in grants and national recognition for the UNT System." Below the text area are three checkboxes: "Send to Supplier", "Show at Receipt", and "Shown at Voucher". To the right of these checkboxes is a link that says "Edit more Comments and Attachments". Below this section is a sub-section titled "Approval Justification", which is circled in red in the original image. Underneath this title is a large text area for "Enter approval justification for this requisition". At the bottom of the form, there are several buttons: "Check Budget", "Pre-Check Budget", "Submit", "Save Before Submit", "Add More Items", and "Preview Approvals".

30. Click **Save Before Submit** at the bottom of the screen.

[Favorites](#) | [Main Menu](#) | [Employee Self-Service](#) | [Procurement](#) | [Requisition](#)

EIS INTERPRETIVE INFORMATION SYSTEM | mmt0110 on FSTSTU (easapp12) - 02/26/2016 16:28:14 | All Search | Advanced Search

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) | [Requisition Settings](#)

Requisition Summary

Business Unit: SY769 | Univ. of North Texas System | Requisition Name: Pipe Organ for Dr. Turner
 *Requester: E92200 | Business Services-Gen | Priority: Medium
 *Currency: USD

[Copy Bid Vendor](#)
[Delete Bid Vendor](#)
[Refresh](#)

[Custom Fields](#)

Cart Summary: Total Amount 47,000.00 USD | [Add More Items](#)

Expand lines to review shipping and accounting details | First | 0 to 1 of 2 | Last

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5268			1.0000	Each	32000.0000	32000.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Add ShipTo Comments Quantity: 1.0000</p> <p>Address: UNT System Business Service Center Add One Time Address Price: 32000.0000</p> <p>Send to: invoices@untsystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205</p> <p>Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400 Add ShipTo Comments Quantity: 1.0000</p> <p>Address: UNT System Business Service Center Add One Time Address Price: 15000.0000</p> <p>Send to: invoices@untsystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205</p> <p>Attention To: Business Services-Gen Due Date: 02/29/2016</p> <p>Accounting Lines</p>											

Select All / Deselect All | Select lines to: | [Add to Favorites](#) | [Add to Template\(s\)](#) | [Delete Selected](#) | [Mass Change](#)

Total Amount 47,000.00 USD

Shipping Summary

Edit for All Lines

Ship To Location: BSCA 400
 Address: UNT System Business Service Center
 Send to: invoices@untsystem.edu
 1112 Dallas Dr., Ste. 4000
 Denton, TX 76205
 Attention To: Business Services-Gen
 Comments:

Requisition Comments and Attachments

Enter requisition comments
 Special Instructions: Please email the address above when the order ships
 Attachments: Refer to any attachments such as contracts or quotes
 Purpose: This purchase will allow Professor Turner to complete the composition of a concert which could result in grants and national recognition for the UNT System.

Send to Supplier | Show at Receipt | Shown at Voucher | [Edit more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition
 This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provides grants to fund more programs for the arts.

[Check Budget](#) | [Pre-Check Budget](#)

[Submit](#) | [Save Before Submit](#) | [Add More Items](#) | 63 [Preview Approvals](#)

31. Click on the triangle icon  next to **Accounting Lines**.

Enterprise Information System
 mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14



Checkout - Review and Submit
 Review the item information and submit the req for approval.

Requisition Summary

Business Unit: SY769 Univ. of North Texas System
 *Requester: E92200 Business Services-Gen
 *Currency: USD
 Requisition Name: Pipe Organ for Dr. Turner
 Priority: Medium
 Copy Bid Vendors
 Delete Bid Vendl
 Refresh

Cart Summary: Total Amount 47,000.00 USD
 Add More Items

Expand lines to review shipping and accounting details

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5268			1.0000	Each	32000.0000	32000.00				
	Shipping Line 1		*Ship To: BSCA 400 Address: UNT System Business Service Center Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205 Attention To: Business Services-Gen Due Date: 02/29/2016	Add Shipto Comments Add One Time Address	Quantity: 1.0000 Price: 32000.0000			Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields			
			 Accounting Lines								
2	Installation			1.0000	Each	15000.0000	15000.00				
	Shipping Line 1		*Ship To: BSCA 400 Address: UNT System Business Service Center Send to: invoices@untssystem.edu 1112 Dallas Dr., Ste. 4000 Denton, TX 76205 Attention To: Business Services-Gen Due Date: 02/29/2016	Add Shipto Comments Add One Time Address	Quantity: 1.0000 Price: 15000.0000			Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields			
			 Accounting Lines								

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

33. 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**.

The screenshot shows the 'Checkout - Review and Submit' page for requisition mmt0110. It displays requisition summary information, a cart summary for a total amount of 47,000.00 USD, and a list of requisition lines. The first line is a shipping line for 'Wicks Opus 5268' with a quantity of 1,000 and a price of 32,000.00. Below this line, the 'Accounting Lines' section is expanded, showing a table with columns for Line, Status, Dist Type, Location, Quantity, Percent, Merchandise Amt, and GL Unit. The first row in this table shows Line 1, Status Open, Dist Type BSCP, Location 400, Quantity 1,000, Percent 100.0000, Merchandise Amt 32,000.00, and GL Unit SY769. The 'Accounting Lines' tab is circled in red.

Chartfields 1

Accounting Lines										Personalize Find View All First 1 of 1 Last			
Chartfields1	Chartfields2	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		BSCP 400	1,000	100.0000	32,000.00	SY769						

Chartfields 2

Accounting Lines														Personalize Find View All First 1 of 1 Last			
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information											
Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate				
53505	7367	922000	200	830001	550												

34. Follow steps 35-37 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**.

35. Click on the blue plus sign **+** at the end of **Chartfields 1**.

Accounting Lines											Personalize	Find	View All	First	1 of 1	Last
Chartfields1	Chartfields2	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		BSCP 400	1.0000	100.0000	32,000.00	SY769				+	-				

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

Accounting Lines											Personalize	Find	View All	First	1-2 of 2	Last
Chartfields1	Chartfields2	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		BSCP 400	1.0000	100.0000	32,000.00	SY769				+	-				
2	Open		BSCP 400	0.0000		0.00	SY769				+	-				

37. Click on the **Chartfields 2** tab.

Accounting Lines											Personalize	Find	View All	First	1-2 of 2	Last
Chartfields1	Chartfields2	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		BSCP 400	0.5000	50.0000	16,000.00	SY769				+	-				
2	Open		BSCP 400	0.5000	50.0000	16,000.00	SY769				+	-				

38. Make changes to the newly created distribution lines, as needed.

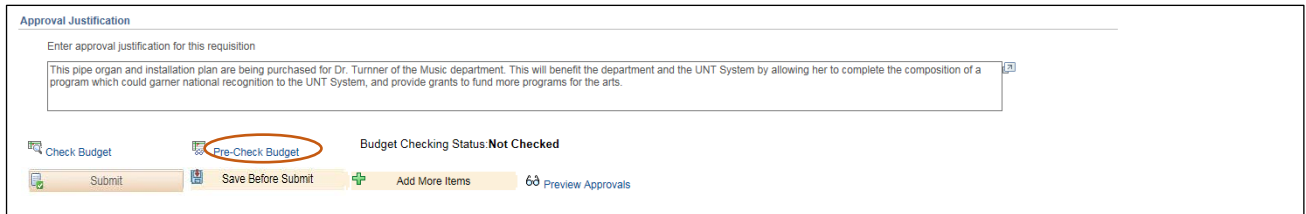
Accounting Lines														Personalize	Find	View All	First	1-2 of 2	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information													
Account	Alt Acct	Dept	Fund Cat	Fund	Function	PC Bus Unit	Project	Activity	Program	Purpose	Site	Affiliate	Fund Affiliate						
53104	7378	922000	105	195001	550									+	-				
53104	7378	922000	105	195001	550									+	-				

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.

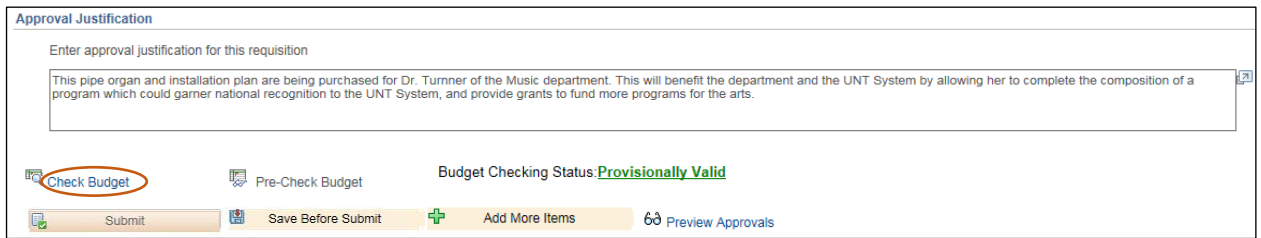
1. Click **Pre-Check Budget** at the bottom of the screen to conduct a pre-budget check, which verifies the availability of funds without encumbering the funds.

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.



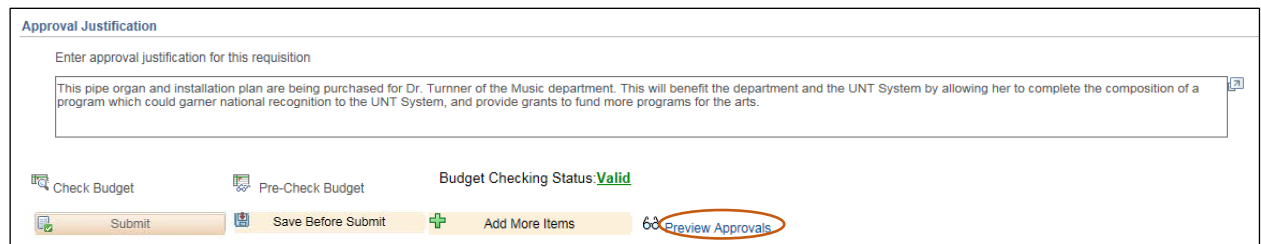
The screenshot shows the 'Approval Justification' section with a text area containing the following text: "This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts." Below the text area, there are several buttons: 'Check Budget', 'Pre-Check Budget' (circled in red), 'Add More Items', 'Save Before Submit', and 'Preview Approvals'. The 'Budget Checking Status' is displayed as 'Not Checked'.

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



The screenshot shows the 'Approval Justification' section with the same text as the previous screenshot. Below the text area, the 'Check Budget' button is circled in red. The 'Budget Checking Status' is now 'Provisionally Valid'.


3. Click **Preview Approvals**.




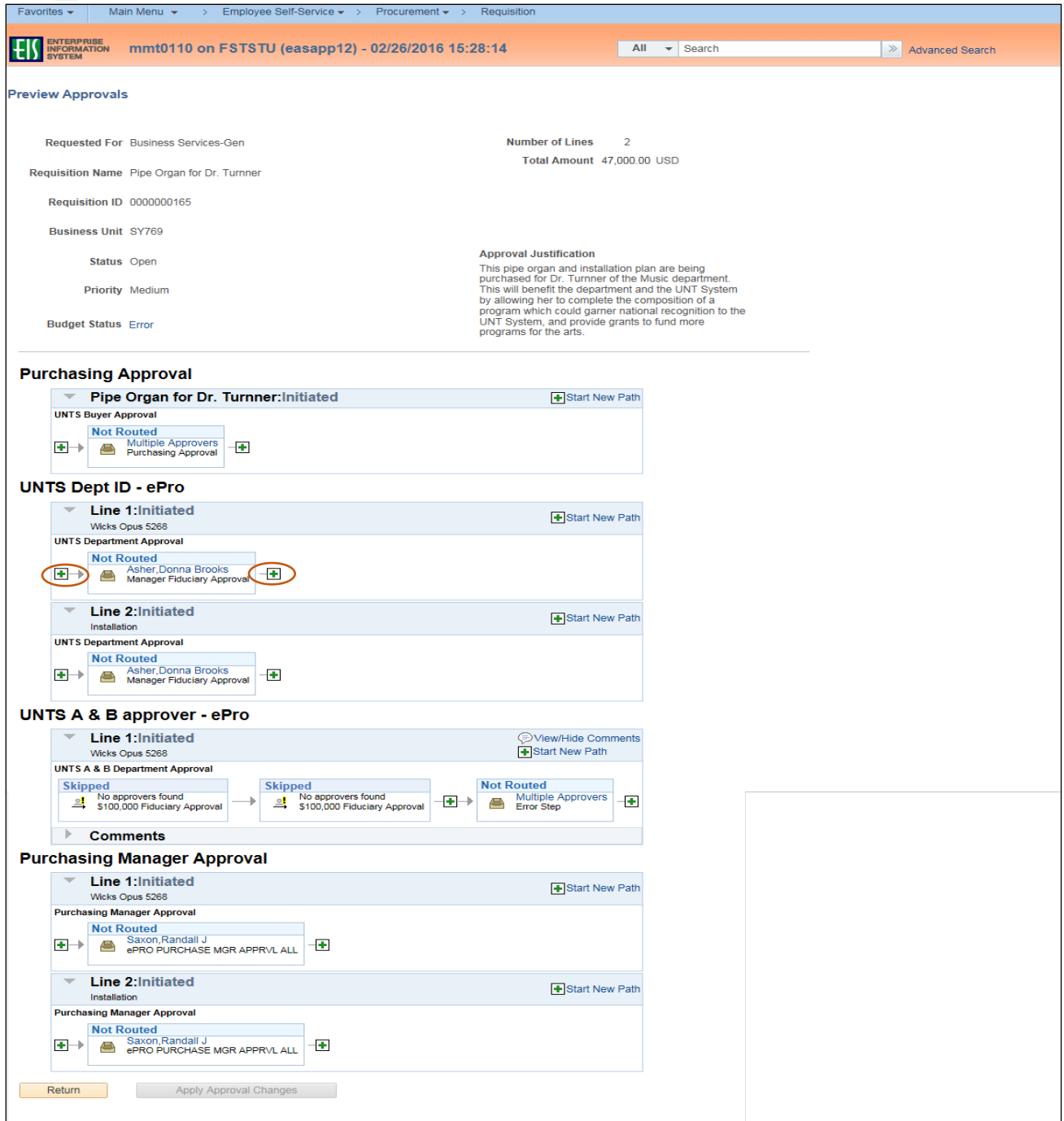
The screenshot shows the 'Approval Justification' section with the same text. Below the text area, the 'Preview Approvals' button is circled in red. The 'Budget Checking Status' is now 'Valid'.

- 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.

- Click the green plus symbol  to add an Approver.

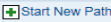
Note: You may add an Approver/Reviewer to the front or end of the workflow by clicking the  before or after the existing Approver.




Preview Approvals

Requested For: Business Services-Gen Number of Lines: 2
 Requisition Name: Pipe Organ for Dr. Turner Total Amount: 47,000.00 USD
 Requisition ID: 0000000165
 Business Unit: SY769
 Status: Open Approval Justification: This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.
 Priority: Medium
 Budget Status: Error


Purchasing Approval

▼ **Pipe Organ for Dr. Turner: Initiated** 

UNTS Buyer Approval



Not Routed
 Multiple Approvers
 Purchasing Approval 

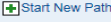
UNTS Dept ID - ePro

▼ **Line 1: Initiated** 

Wicks Opus 5268


UNTS Department Approval

Not Routed
 Asher, Donna Brooks
 Manager Fiduciary Approval  

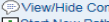
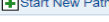
▼ **Line 2: Initiated** 

Installation

UNTS Department Approval



Not Routed
 Asher, Donna Brooks
 Manager Fiduciary Approval 

UNTS A & B approver - ePro


▼ **Line 1: Initiated**  

Wicks Opus 5268

UNTS A & B Department Approval


Skipped No approvers found \$100,000 Fiduciary Approval → Skipped No approvers found \$100,000 Fiduciary Approval  → Not Routed Multiple Approvers Error Step 

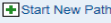
Purchasing Manager Approval

▼ **Line 1: Initiated** 

Wicks Opus 5268


Purchasing Manager Approval

Not Routed
 Saxon, Randall J
 ePRO PURCHASE MGR APPRVL ALL 

▼ **Line 2: Initiated** 

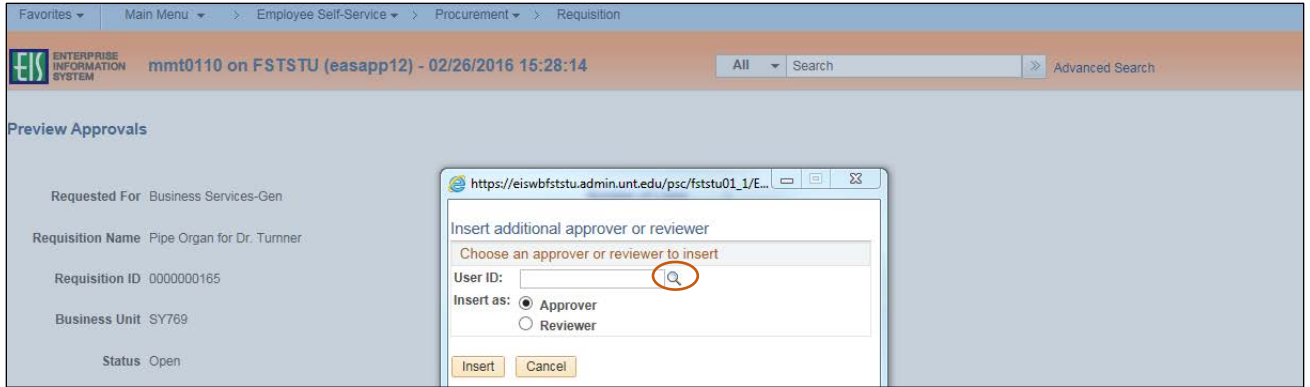
Installation

Purchasing Manager Approval

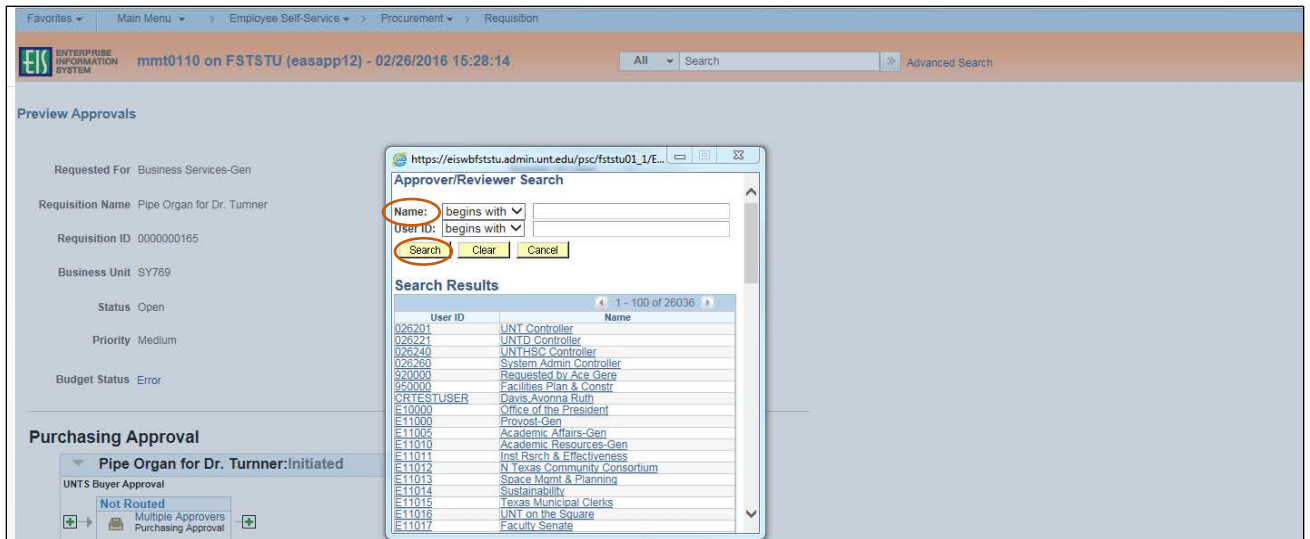
Not Routed
 Saxon, Randall J
 ePRO PURCHASE MGR APPRVL ALL 

Return Apply Approval Changes

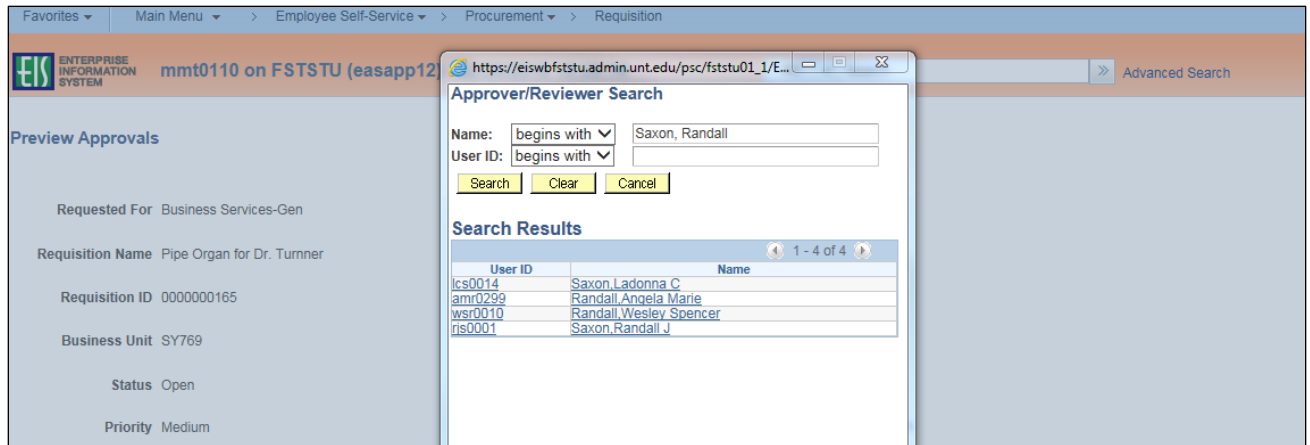
- Click on the magnifying glass beside the blank **User ID** field.



- Enter a full or partial name (Last Name, First Name) into the **Name** field.
- Click **Search**.

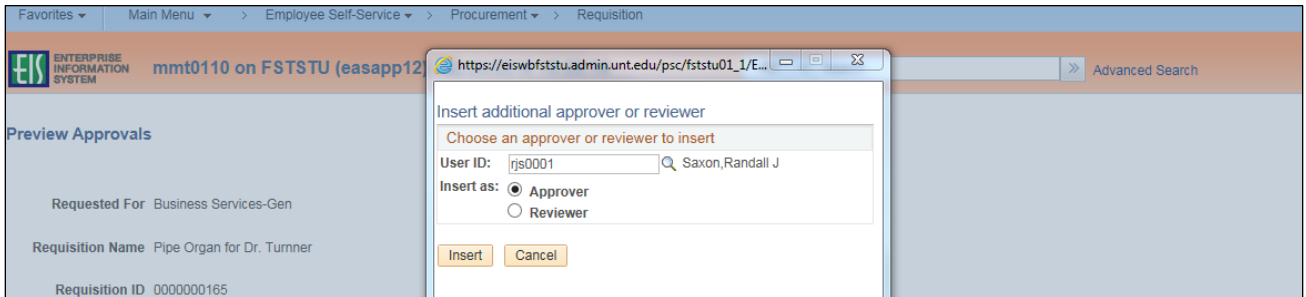


- Select the appropriate **Name** or **User ID** for the Approver/Reviewer you want to insert.



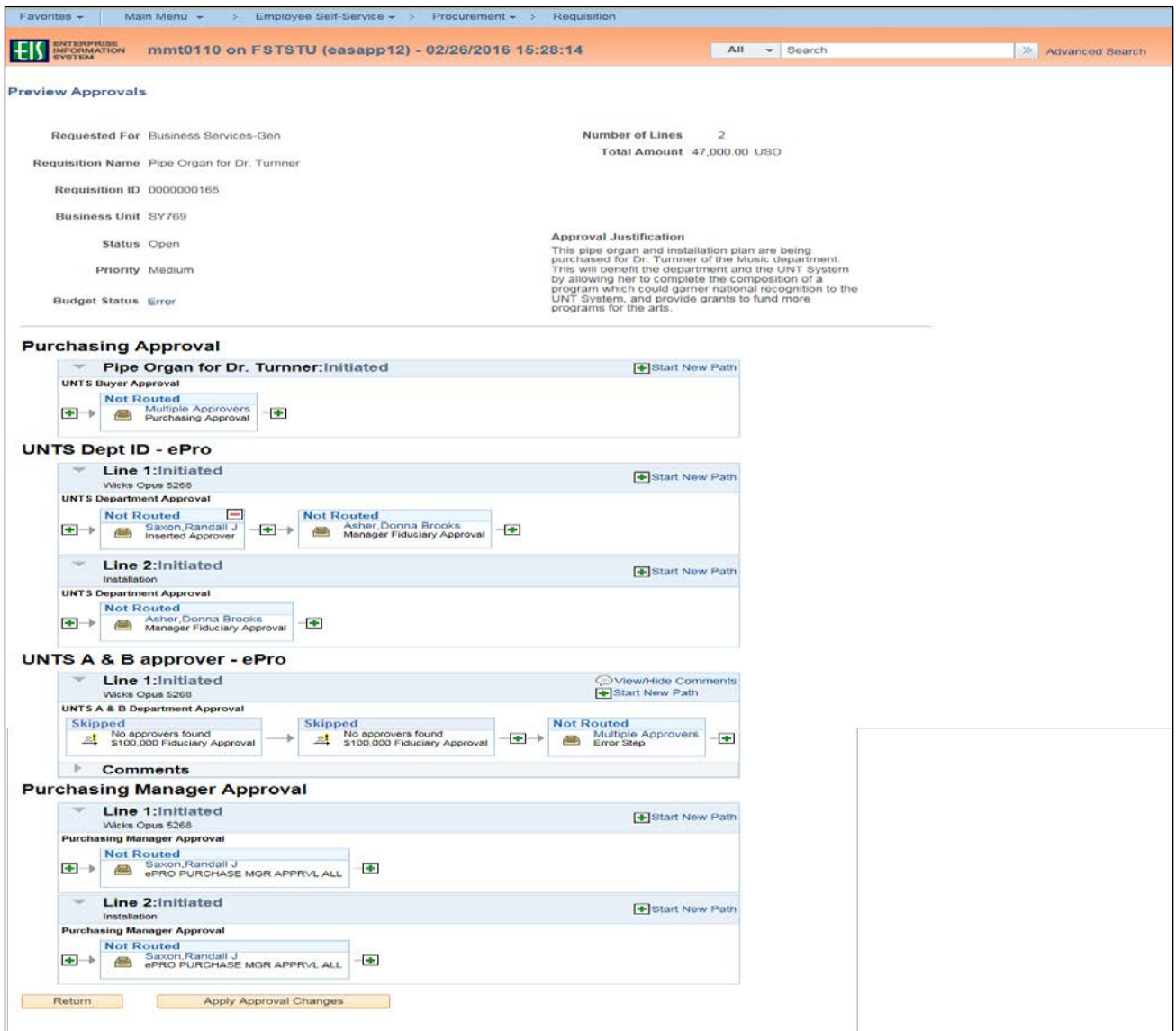
10. Click **Insert**.

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**.

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Procurement](#) > [Requisition](#)

ENTERPRISE INFORMATION SYSTEM **mmt0110 on FSTSTU (easapp12) - 02/26/2016 15:28:14**
All Search [Advanced Search](#)

Preview Approvals

Requested For Business Services-Gen	Number of Lines 2
Requisition Name Pipe Organ for Dr. Turner	Total Amount 47,000.00 USD
Requisition ID 0000000165	
Business Unit SY769	
Status Open	Approval Justification
Priority Medium	This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.
Budget Status Error	

Purchasing Approval

▼ Pipe Organ for Dr. Turner:Initiated + Start New Path

UNTS Buyer Approval

Not Routed +
Multiple Approvers Purchasing Approval +

UNTS Dept ID - ePro

▼ Line 1:Initiated + Start New Path

Wicks Opus 5268

UNTS Department Approval

Not Routed + → Not Routed +
Saxon,Randall J Inserted Approver + → Asher,Donna Brooks Manager Fiduciary Approval +

▼ Line 2:Initiated + Start New Path

Installation

UNTS Department Approval

Not Routed +
Asher,Donna Brooks Manager Fiduciary Approval +

UNTS A & B approver - ePro

▼ Line 1:Initiated View/Hide Comments + Start New Path

Wicks Opus 5268

UNTS A & B Department Approval

Skipped + → Skipped + → Not Routed +
No approvers found \$100,000 Fiduciary Approval + → No approvers found \$100,000 Fiduciary Approval + → Multiple Approvers Error Step +

▶ **Comments**

Purchasing Manager Approval

▼ Line 1:Initiated + Start New Path

Wicks Opus 5268

Purchasing Manager Approval

Not Routed +
Saxon,Randall J ePRO PURCHASE MGR APPRVL ALL +

▼ Line 2:Initiated + Start New Path

Installation

Purchasing Manager Approval

Not Routed +
Saxon,Randall J ePRO PURCHASE MGR APPRVL ALL +

Return
Apply Approval Changes

14. Click **Submit**.

[Favorites](#) > [Main Menu](#) > [Employee Self-Service](#) > [Procurement](#) > [Requisition](#)

ENTERPRISE INFORMATION SYSTEM mmt0110 on FSTSTU (easapp12) - 02/26/2016 17:08:59 All Search > Advanced Search

Edit Requisition - Review and Submit

Review the Item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit SY769	Univ. of North Texas System	Requisition Name Pipe Organ for Dr. Turner	Copy Bid Vendors Delete Bid Vendors Refresh
Requester E92200	Business Services-Gen	Requisition ID 0000000165	
*Currency USD		Priority Medium	

[Add More Items](#)

Cart Summary: Total Amount 47,000.00 USD

Expand lines to review shipping and accounting details

[First](#) 1 to 2 of 2 [Last](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Bid Tab	Delete
1	Wicks Opus 5268			1.0000	Each	32000.0000	32000.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400</p> <p>Address: UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205</p> <p>Attention To: Business Services-Gen</p> <p>Due Date: 02/29/2016</p> <p>Accounting Lines</p>											
2	Installation			1.0000	Each	15000.0000	15000.00				
<p>Shipping Line 1</p> <p>*Ship To: BSCA 400</p> <p>Address: UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205</p> <p>Attention To: Business Services-Gen</p> <p>Due Date: 02/29/2016</p> <p>Accounting Lines</p>											

Select All / Deselect All
 Select lines to:
 [Add to Favorites](#)
 [Add to Template\(s\)](#)
 [Delete Selected](#)
 [Mass Change](#)

Total Amount 47,000.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location BSCA 400
Address UNT System Business Service Center, 1112 Dallas Dr., Ste. 4000, Denton, TX 76205
Attention To Business Services-Gen
Comments

Requisition Comments and Attachments

Enter requisition comments

Dept. Contact: Karen James | Contact Phone: 940-555-5555 | Contact Email: karenjames@unt.edu
 Special Instructions: Please email the address above when the order ships
 Attachments: Refer to any attachments such as contracts or quotes

Send to Supplier
 Show at Receipt
 Shown at Voucher
 [Edit more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.

[Check Budget](#)
 [Pre-Check Budget](#)
 Budget Checking Status **Valid**

[Submit](#)
 [Save Before Submit](#)
 [Add More Items](#)
 [Preview Approvals](#)

Note: The Confirmation screen will open.

Confirmation

Your requisition has been submitted.

Requested For	Business Services-Gen	Number of Lines	2
Requisition Name	Pipe Organ for Dr. Turner	Total Amount	47,000.00 USD
Requisition ID	000000165	Approval Justification	This pipe organ and installation plan are being purchased for Dr. Turner of the Music department. This will benefit the department and the UNT System by allowing her to complete the composition of a program which could garner national recognition to the UNT System, and provide grants to fund more programs for the arts.
Business Unit	SY789		
Status	Open		
Priority	Medium		
Budget Status	Not Checked		

View printable version | Edit This Requisition | Check Budget | Pre-Check Budget

Purchasing Approval

Pipe Organ for Dr. Turner: Initiated

UNTS Buyer Approval

Not Routed: Multiple Approvers Purchasing Approval

UNTS Dept ID - ePro

Line 1: Initiated

Wicks Opus 5268

UNTS Department Approval

Not Routed: Saxon, Randall J. Inserted Approver

Not Routed: Asher, Donna Brooks. Manager Fiduciary Approval

Line 2: Initiated

Installation

UNTS Department Approval

Not Routed: Asher, Donna Brooks. Manager Fiduciary Approval

UNTS A & B approver - ePro

Line 1: Initiated

Wicks Opus 5268

UNTS A & B Department Approval

Skipped: No approvers found \$100,000 Fiduciary Approval

Skipped: No approvers found \$100,000 Fiduciary Approval

Not Routed: Multiple Approvers Error Step

Purchasing Manager Approval

Line 1: Initiated

Wicks Opus 5268

Purchasing Manager Approval

Not Routed: Saxon, Randall J. ePRO PURCHASE MGR APPRVL ALL

Line 2: Initiated

Installation

Purchasing Manager Approval

Not Routed: Saxon, Randall J. ePRO PURCHASE MGR APPRVL ALL

Apply Approval Changes

Create New Requisition | Manage Requisitions

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](#).