

Multi-Year Requisitions/POs

Shopping is Easy in ePro!



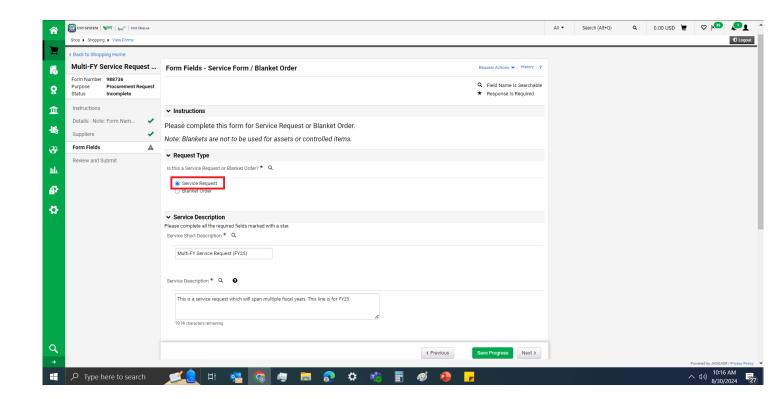
Guidelines

- Multi-FY POs are service purchase orders that cover the term of an agreement and cross multiple fiscal years
 - Multi-FY PO functionality is only available on Service Request/Blanket Order form Service Request (Request
 Type = Service Request)
- Multi-FY POs are not for project/grant funds
 - Note: These funds already ignore the fiscal year boundaries, so no change is occurring
- Multi-FY POs can not have split funding
- Fiscal Years end on 08/31/YYYY and begin on 09/01/YYYY
- The Accounting Date should be the current date



- Creating a Multi-FY service requisition is almost the same as creating a service requisition for a single fiscal year.
 - For a refresher on creating a service requisition more generally, please review the <u>Service Request training</u> guide.
- While filling in the form, don't forget to select Service Request!

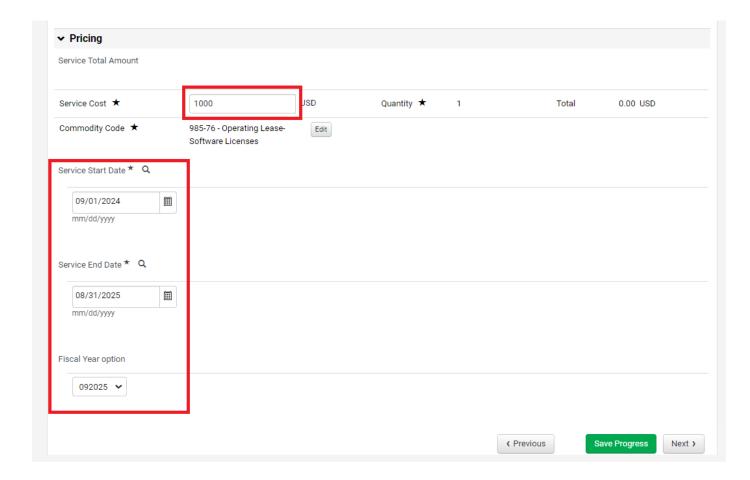
Setup





- The first form will be the first line on the requisition.
- Each line can only cover one fiscal year.
 - Note: It is fine to have multiple lines for one FY. (i.e. FY25 Service Item 1: Service Start Date / Service End Date 09/01/2024 – 10/31/2024, Service Item 2: Service Start Date / Service End Date 01/01/2025– 8/31/2025, etc.)
- The Service Start and End dates must match the FY selected for each line.
 - (i.e. line 1 FY25 dates: 09/1/24-08/31/2025, line 2 FY26 dates – 09/01/2025-03/31/2026, etc.)
- The Service Cost should be the amount for the entire period specified.

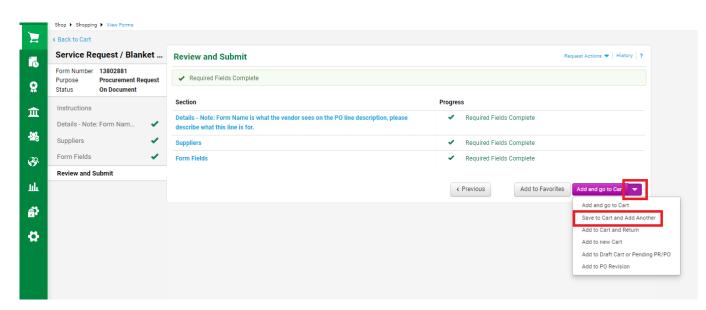
Setup

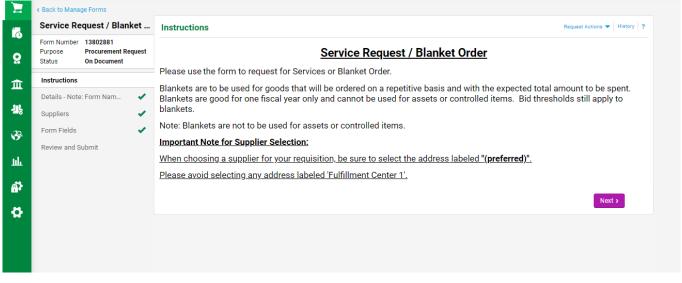




Additional Lines

- You can add additional lines for other fiscal years, or for multiple lines within the same fiscal year.
- On the Review and Submit page, use the dropdown menu to select Save to Cart and Add Another. (If you already added the line to your cart, no need to worry! Go to the next slide.)
- The second picture is what you will see after clicking Save to Cart and Add Another. Notice that the fields are automatically filled out identically to the first line. All you need to do is update the information that changes for the second line!
- If more lines are needed, repeat. Otherwise, click
 Add and go to Cart on the final page.

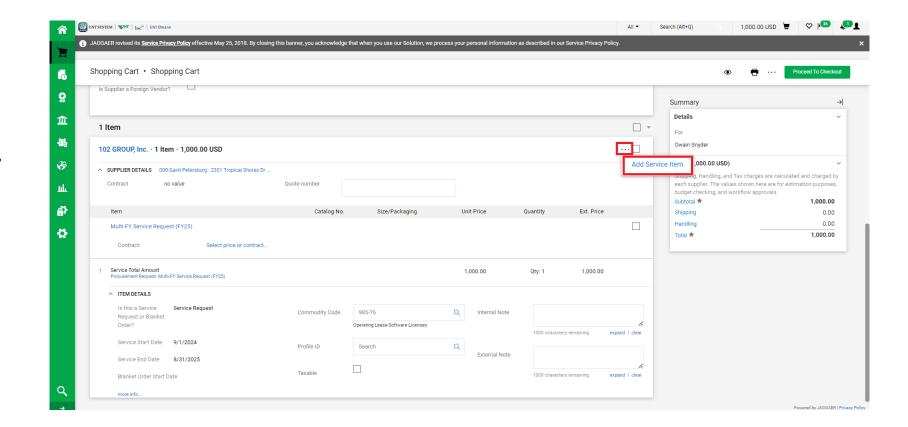






 To add another line from the cart, click the three dots pictured here and select Add Service Item.

Additional Lines





- Your cart should end up looking something like this. Notice that the Service Start and End Dates show on the line for a quick reference point.
- Finish filling in the rest of your information and submit!

Finishing Up

