



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



Setup

- 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 [Service Request training guide](#).
- While filling in the form, don't forget to select Service Request!

The screenshot displays the 'Form Fields - Service Form / Blanket Order' page in the E-PRO system. The page is titled 'Multi-FY Service Request ...' and shows the following details:

- Form Number:** 988736
- Purpose:** Procurement Request
- Status:** Incomplete

The 'Form Fields' section is expanded to show the following sections:

- Instructions:** Please complete this form for Service Request or Blanket Order. Note: Blankets are not to be used for assets or controlled items.
- Request Type:** Is this a Service Request or Blanket Order? *
 - Service Request
 - Blanket Order
- Service Description:** Please complete all the required fields marked with a star.
 - Service Short Description *
Multi-FY Service Request (FY25)
 - Service Description *
This is a service request which will span multiple fiscal years. This line is for FY25
1914 characters remaining

At the bottom of the form, there are buttons for '< Previous', 'Save Progress', and 'Next >'. The system footer shows 'Powered by JAGGAER | Privacy Policy' and the date '10:16 AM 8/30/2024'.



- 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

▼ Pricing

Service Total Amount

Service Cost ★	<input type="text" value="1000"/>	USD	Quantity ★	1	Total	0.00 USD
Commodity Code ★	985-76 - Operating Lease-Software Licenses		<input type="button" value="Edit"/>			

Service Start Date ★ 🔍

mm/dd/yyyy

Service End Date ★ 🔍

mm/dd/yyyy

Fiscal Year option

▼



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.

Shop > Shopping > View Forms

< Back to Cart

Service Request / Blanket ...

Form Number 13802881
Purpose Procurement Request
Status On Document

Instructions

Details - Note: Form Nam... ✓
Suppliers ✓
Form Fields ✓

Review and Submit

Review and Submit

Request Actions | History | ?

Required Fields Complete

Section	Progress
Details - Note: Form Name is what the vendor sees on the PO line description, please describe what this line is for.	Required Fields Complete
Suppliers	Required Fields Complete
Form Fields	Required Fields Complete

< Previous Add to Favorites Add and go to Cart

- Add and go to Cart
- Save to Cart and Add Another
- Add to Cart and Return
- Add to new Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision

< Back to Manage Forms

Service Request / Blanket ...

Form Number 13802881
Purpose Procurement Request
Status On Document

Instructions

Details - Note: Form Nam... ✓
Suppliers ✓
Form Fields ✓
Review and Submit

Instructions

Service Request / Blanket Order

Please use the form to request for Services or Blanket Order.

Blankets are to be used for goods that will be ordered on a repetitive basis and with the expected total amount to be spent. Blankets are good for one fiscal year only and cannot be used for assets or controlled items. Bid thresholds still apply to blankets.

Note: Blankets are not to be used for assets or controlled items.

Important Note for Supplier Selection:

When choosing a supplier for your requisition, be sure to select the address labeled "(preferred)".

Please avoid selecting any address labeled 'Fulfillment Center 1'.

Next >



Additional Lines

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

The screenshot displays a shopping cart interface. At the top, there is a navigation bar with the text 'UNTSYSTEM | UNT | Inc. | UNT DALLAS' and a search bar. Below this is a banner for JAGGAER's Service Privacy Policy. The main content area is titled 'Shopping Cart' and shows a single item: '102 GROUP, Inc. - 1 Item - 1,000.00 USD'. A 'More Options' menu is open for this item, with 'Add Service Item' highlighted in a red box. The item details section includes fields for 'Is this a Service Request or Blanket Order?', 'Commodity Code' (985-76), 'Internal Note', 'Service Start Date' (9/1/2024), 'Profile ID', 'Service End Date' (8/31/2025), 'External Note', and 'Blanket Order Start Date'. A summary panel on the right shows the subtotal as 1,000.00 USD and the total as 1,000.00 USD. A 'Proceed To Checkout' button is visible in the top right corner.



Finishing Up

- 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!

The screenshot displays the ePro Shopping Cart interface. The browser address bar shows the URL: `usertest.sciquest.com/apps/Router/ReqConfigurableCart?ReqId=4078962&ShoppingType=materialShop&tmstmp=1725032343142`. The page title is "Shopping Cart • Shopping Cart".

Two line items are visible, both with a "Service Total Amount" of 1,000.00 and a quantity of 1. Each line item has an "ITEM DETAILS" section highlighted with a red box. The details for the first item (FY25) are:

- Is this a Service Request or Blanket Order? **Service Request**
- Service Start Date: **9/1/2024**
- Service End Date: **8/31/2025**

The details for the second item (FY26) are:

- Is this a Service Request or Blanket Order? **Service Request**
- Service Start Date: **9/1/2025**
- Service End Date: **8/31/2026**

Other fields for both items include: Commodity Code (985-76), Profile ID (Search), Internal Note (1000 characters remaining), External Note (1000 characters remaining), and Taxable (checkbox). A "Proceed To Checkout" button is located in the top right corner. A summary panel on the right shows a total of 2,000.00 USD, with Subtotal at 2,000.00, Shipping at 0.00, and Handling at 0.00.