EP.020.503 – CREATING AN ePro REQUISITION WITH A PROCUREMENT CONTRACT

Purpose	• To describe how to add a procurement contract to an ePro requisition. • To identify where requisition comments can be added for designated areas. • To identify where to review and submit the requisition.
Description	Requisitions can be created from a contract in two ways – by entering the Contract ID manually or by copying from an existing contract. Contracts fall into one of three categories: Agency, Statewide, and University System of Georgia (USG). Institutional Contract Admins are responsible for adding and maintaining institution-specific contracts (Agency). Statewide contracts are entered by the University System Office (USO) for all institutions to reference procurement transactions. USG contracts are entered by USO for institutions to reference contract documentation, but not to reference on procurement transactions. Additionally, Procurement Contracts for all institutions are entered into the POCON SetID. Since this is a shared SetID, institutions have access to contracts they did not enter. It is imperative users only update Agency contracts for their specific institution.
Security Role	**BOR_EP_MAINT_REQ**
Dependencies/ Constraints	Procurement Contract exists in PeopleSoft. For more information on how to verify the contract exists in PeopleSoft, see business process PC.010.012 – Inquiring on a Procurement Contract. An institution must use SHARE Suppliers to create a Procurement Contract. Once a contract is created, it can be referenced on a Purchase Order.

Additional Information	• BOR_PO_CONTRACT_INQUIRY role to view procurement contract.
	• For more information regarding creating an eProcurement Requisition, see EP.020.500 - Creating a Special Request Requisition
	• A supplier may have multiple contracts in the system. If a contract is referenced to create a Requisition the following occurs:
	  ○ If the Auto Default option is selected on a single contract, this contract defaults in the Contract ID field on the Requisition line.
	  ○ If the Auto Default option is selected on all contracts for the supplier, the contract with the most recent Begin Date defaults in the Contract ID field on the Requisition line.
	  ○ If the Auto Default option is selected on a contract where contract line items are listed, and this contract is used to create the Requisition, this contract defaults in the Contract ID field on the Requisition line.

Procedure

Below are step by step instructions on how to add a Procurement Contract to an ePro Requisition.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **eProcurement** link.
4.	Click the **Create Requisition** link. The system navigates to the Look Up Business Unit page.
5.	Enter or search for the **Business Unit**.
6.	Enter or search for the **Requester**.
7.	Click **OK**. The system navigates to the Create Requisition page.
8.	Click the **Special Requests** link.

Step	Action
9.	Enter the **Item Description**. (Ex: Blue Ink Pen)
10.	Enter the **Price.**
11.	Enter the **Quantity**.
12.	Enter or search for the **Category** (NIGP Code).
13.	Enter the **Unit of Measure**.
14.	Enter the **Supplier ID** and **Supplier Name**.
15.	Click the **Add to Cart** button once all information is entered.
16.	Continue to add additional items, following Steps 9 - 15 until all items are added to the Shopping Cart.
17.	Once all items are added to the Shopping Cart, click the **Checkout** button at the top of the page. The system navigates to the Checkout – Review and Submit page.
18.	Under the Requisition Lines section, click on the Details icon for the Contract Line Item. The system generates the Line Details popup window.
19.	On the Line Details popup window, enter or search for information in the following fields: • **Contract ID:** field used to enter or search for Contract ID. • **Contract Line:** if the Procurement Contract has defined lines use this field to specify a Contract Line ***Note:*** *depending on how the Procurement Contract is setup the Contract ID may populate in the Contract ID field. See Additional Information section for more information.*
20.	Click **OK**.
21.	The system navigates to the Checkout – Review and Submit page. To view the requisition line information, click the Expand triangle icon to the left of the line checkbox to expand the section. The information added on the Special Requests page is listed in this section. Additional information (Ship To, Comments, Attachments) can be added/modified here.
22.	To add comments or attachments to a requisition line, click the **Add** link in the Comments column.

Step	Action
23.	To modify the ChartField, Asset, and Budget information, click the Expand triangle to the left of the Requisition Line, then click the Expand triangle to the left of the Accounting Lines section to expand the section. ***Note:*** *If all items on the requisition need the same Accounting Lines modifications, click the Select All/Deselect All checkbox, click the* ***Mass Change*** *link, and make the necessary adjustment(s).*
24.	To perform a pre-budget check, click the **Pre-Check Budget** link. For more information regarding pre-budget checking, see EP.020.500 - Creating a Special Request Requisition
25.	Users can either save a draft requisition for further editing and/or review or save and submit the requisition into the workflow. • Option 1: To submit the requisition into the workflow process for approvals, click the **Save & Submit** button. • Option 2: To save the requisition for later, click the **Save for Later** button. This action saves the requisition but does not submit it. The Requisition ID can be found at the top of the page after selecting this button.
26.	The Confirmation page opens. From this page users can: • View Printable Version • Edit the Requisition. For more information on how to edit a requisition, see EP.020.550 - Editing, Saving, and Submitting a Requisition. • View the Approval Path and the Approvers for each step (if Multiple Approvers exist for a step, click the link to see who can approve the Requisition) • Pre-Check Budget • Create New Requisition • Navigate back to Manage Requisitions page