The eProcurement module is a web-based purchasing system designed to provide UTMB end-users with online creation and submission of requisitions. Additionally, based on the funding department number, project number, and commodity being requested, ePro electronically routes the requisition to the appropriate individuals for review and approval.

Since PeopleSoft is an integrated system, it is important that the end-user enter the correct information on the requisition the first time so accurate information carries forward on the purchase order and on to other PS modules including Accounts Payable, Asset Management, Grants, and General Ledger.

The Procure-to-Pay process begins when a Requester creates a requisition. When the Requisition has been approved and successfully budget checked, a Buyer creates or the system auto-generates a purchase order and it is dispatched to the vendor. After the merchandise/service has been received and inspected, the vendor's invoice can be vouchered and paid.

Basic Steps to Creating a Requisition:

Pathway: Main Menu > eProcurement > Create Requisition
Validate the appropriate Business Unit and Requester name appears on this page. Update this information as appropriate.

Optional: Enter a Requisition Name

**Decision Point:**
- Do I need to update funding for this purchase or am I using my default chartfield string?
- Where is my merchandise being delivered?
- What type of Requisition am I creating (Web or Special Request)?
- Do I have all required information (including a price quote for a DEP Special Request)?

To select the appropriate vendor for a Special Request requisition and/or to update the funding or delivery of this purchase, expand the Line Defaults section of this page:

**Selecting a Vendor:**

For all Special Request requisitions, use the look-up to select the appropriate vendor/vendor location. Note – if this requisition is being processed as a punch-out/web eCatalog order, do not select a vendor. For punch-out orders, the appropriate vendor and vendor location will default into the requisition once items have been selected.
Enter appropriate search criteria to assist in locating the vendor. Click the Find button.

Scan the listing of vendors to locate the appropriate vendor address/location.
To confirm you are selecting the correct vendor location, click the Vendor Detail icon.

This page will provide you with the vendor Telephone number, Fax number, and UTMB’s customer ID with this vendor. To view the vendor’s address, click the Envelope icon.
To select this vendor location for this Requisition, click the Select Vendor icon (green checkmark).

### Updating the Chartfield (Funding):

Each end-user is set-up with a default chartfield string which automatically populates on the end-user’s requisition. The end-user is responsible for updating the chartfield string on their requisition as appropriate. The easiest and best way to change the chartfield string for all items on the requisition is to update the funding on the Line Defaults page prior to adding line items to the requisition.

In the Accounting Defaults section, enter a valid SpeedChart value or update each individual chartfield value as appropriate.

To update the funding utilizing a SpeedChart, enter the SpeedChart value and click TAB. Validate the funding updated as appropriate.

### Updating Freight Terms, Ship to, and Location Codes:

The Line Defaults page can also be used to update the Freight Terms, the Ship to address, and the Location code.

- The Freight Terms assist in defining if freight will be paid for this purchase. If no freight will be charged by the vendor, change the Freight Terms Code to DEST.

- The “Ship to” address is important because this is the location that will print on the Purchase Order to advise the vendor where to ship your merchandise.
The “Location” code is where the Supply Chain – Delivery team will deliver your merchandise from Central Receiving to your department. To prevent delays in receiving your merchandise, always validate the correct “Location” code appears on your requisition.

If changes are required, use the look-up magnifying glass to select the appropriate Freight Terms, Ship to code, and/or Location code.

**Note:** Do not enter a Buyer, Category, or Unit of Measure on this page.

Once all changes have been made to this page, click the Continue button:

### Creating a Punch-Out Web Requisition:

UTMB has established several eCatalogs for easier ordering of supplies. Punch-out/Web requisitions require less data entry and fewer steps to process. There is no need to select a vendor, enter a category code, type a description, etc. All required data is populated for you.

Click the Web tab and select the appropriate eCatalog.

Note: Each vendor’s website has a different look – unique to that vendor. However, each website works in the same manner - search for an item, select the item to be purchased, enter quantity to be ordered. Items are placed in a Shopping Cart. Once all items are selected, review your Shopping Cart and return the items into your eProcurement Requisition.
Review items and add any additional comments. Budget check and submit the requisition for approval (see details below).

Creating a Special Request Requisition:

Click the Special Request tab and select the appropriate type of request. For merchandise not listed in a Web eCatalog, click the Special Item hyperlink.

All requisitions must include a description, quantity, unit of measure, category (commodity code), and vendor item ID (catalog #). Additionally, UCLIN requisitions must also include the manufacturer ID.

- Vendor Item ID is the unique number assigned by the vendor you will be ordering from
- Manufacturer ID is the company that manufactures/makes the item being ordered

Enter a meaningful, detailed line item description, price, quantity, and unit of measure. Note: if this requisition will be processed under the Small Order System (DEP), enter the price provided by the vendor when you obtained your quote. Additionally, ensure you are selecting the appropriate Unit of Measure associated with the price entered ($40.00 per case; $25.00 each).
Select a Category Code

The Category code is a required field for all line items on a Special Request requisition. Each Category code is tied to a default Account code. The default Account code can be modified by the end-user as appropriate once the line item has been added to the Requisition.

Click the magnifying glass icon to search for the appropriate Category code that best describes the item being purchased.

Enter search criteria and click the Look-Up button:

Select the Category code that best describes the item being purchased:
Enter the Vendor Item ID (catalog #) and when creating a UCLIN requisition, select the Mfg ID. Optional: Enter a Due Date and if required, enter any additional information. If the additional information should be included on the purchase order and transmitted to the vendor, select the “Send to Vendor” box.

Click the Add Item button:

To add additional line items to this same requisition, repeat steps listed above. Once all line items have been entered, click the Review and Submit hyperlink to continue the requisition creation process.

Review and Submit:

Once all line items have been entered, validate the vendor, quantities, unit of measure, and prices have been entered correctly.
Additional Comments (Optional):

Enter additional comments (if applicable).
- Checking the Approval Justification box ensures comment #1 displays on your approver’s worklist.
- To add more than one comment, click the More Comments hyperlink.

Budget Check and Submit Requisition for Approval:

All requisitions must have a Valid budget check status and be fully approved before a purchase order can be created. Click the Budget Check button to validate funding and pre-encumber funds associated with this requisition:

Click OK to save the Requisition and run budget check:
Once the Budget Check status is Valid, click the Save & Submit button to route the requisition for approval and further processing:

The following confirmation page displays the Requisition # and who the requisition routed to for approval:

If the requisition routed to multiple approvers, click the hyperlink to see a listing of all approvers:

Use the scroll bar on the right to scroll through the listing of approvers. Click the Close button to exit this window.