
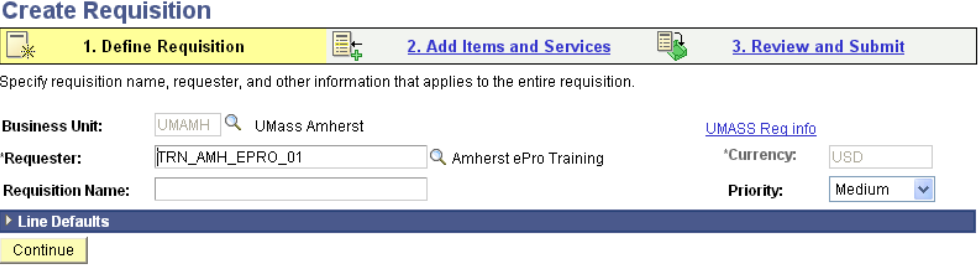


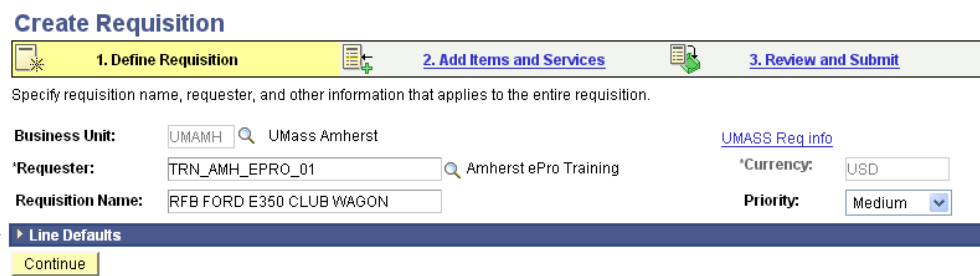
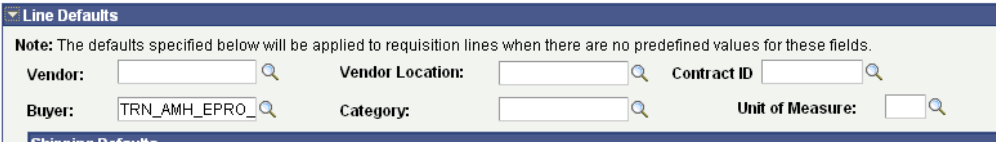



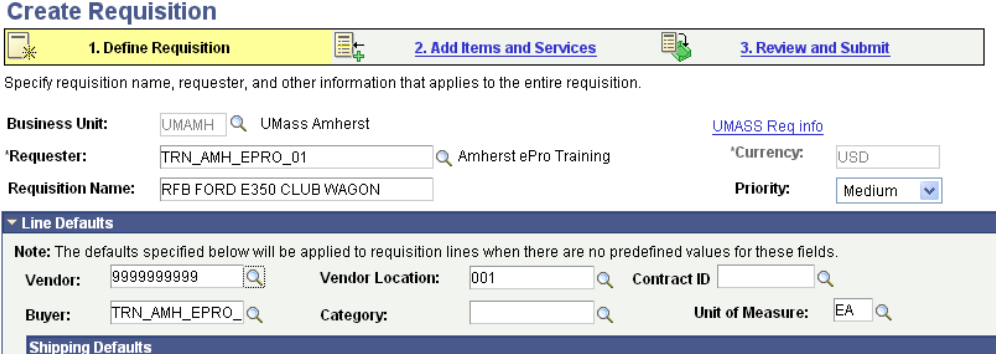

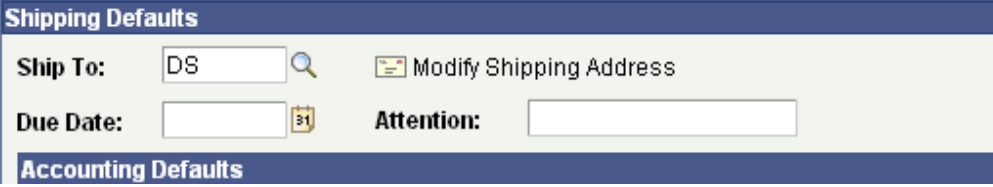


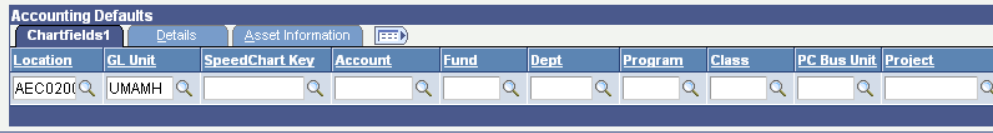

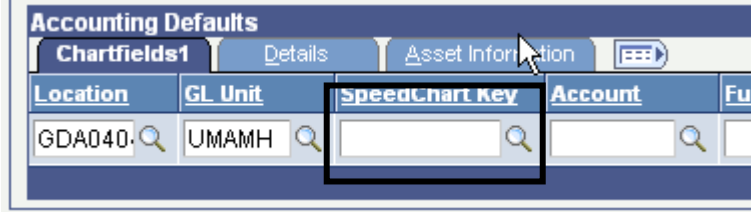
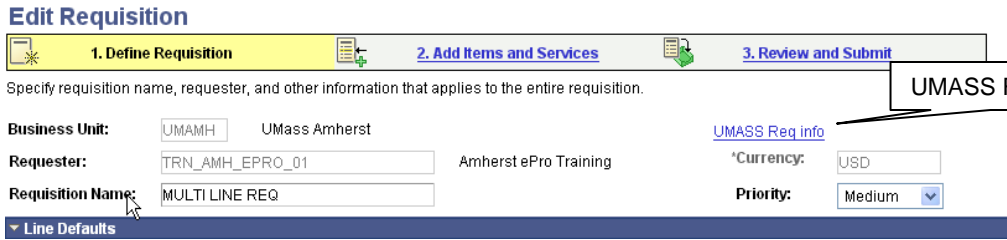



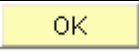
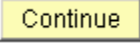
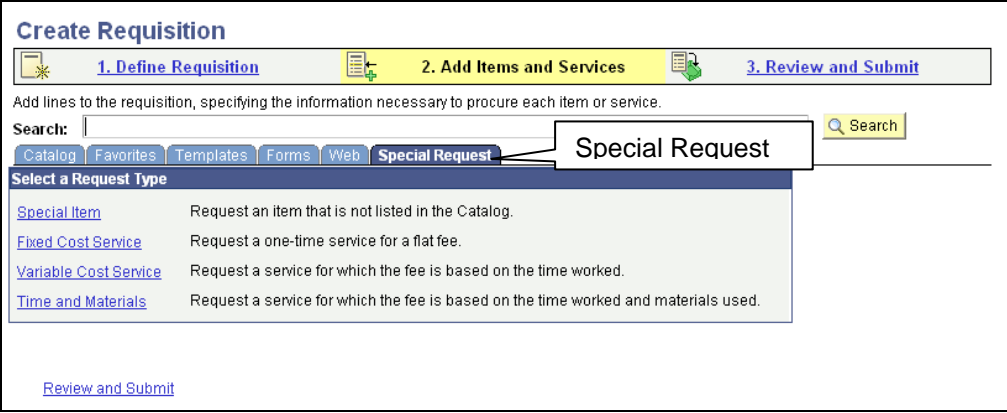
Request for Bid (RFB) eProcurement Requisition	
	<p>Navigate to the following path:</p> <p style="text-align: center;"><i>eProcurement</i> → <i>Create Requisition</i></p>
	<p>The <i>Create Requisition</i> page opens.</p>  <p>Create Requisition</p> <p>Specify requisition name, requester, and other information that applies to the entire requisition.</p> <p>Business Unit: <input type="text" value="UMAMH"/> UMass Amherst UMASS Req info</p> <p>*Requester: <input type="text" value="TRN_AMH_EPRO_01"/> Amherst ePro Training *Currency: <input type="text" value="USD"/></p> <p>Requisition Name: <input type="text"/> Priority: <input type="text" value="Medium"/></p> <p>▶ Line Defaults</p> <p><input type="button" value="Continue"/></p>
Step 1.	Select the <i>1. Define Requisition Tab</i> , if it is not already selected.
	<p>The following fields are located on the Define Requisitions page:</p> <ul style="list-style-type: none"> ◆ Business Unit: Required. Defaulted from your User ID ◆ Requester: Required. Defaulted from your User ID ◆ Requisition Name: Optional, but Recommended. A searchable field. Use the Requisition Name field to name the Requisition in a memorable way (any way you like, to make it easy for you to find your requisition later). This field is limited to 30 characters. If left blank the Requisition ID number will be assigned as the Requisition Name. It populates the PO reference.
Step 2.	Enter a <i>Requisition Name</i> .
	<p>Click the <i>Line Defaults Expand Section</i> icon </p>  <p>Create Requisition</p> <p>Specify requisition name, requester, and other information that applies to the entire requisition.</p> <p>Business Unit: <input type="text" value="UMAMH"/> UMass Amherst UMASS Req info</p> <p>*Requester: <input type="text" value="TRN_AMH_EPRO_01"/> Amherst ePro Training *Currency: <input type="text" value="USD"/></p> <p>Requisition Name: <input type="text" value="RFB FORD E350 CLUB WAGON"/> Priority: <input type="text" value="Medium"/></p> <p>▶ Line Defaults</p> <p><input type="button" value="Continue"/></p>

Expand Section

<p>Step 3.</p>	<p>Scroll down to the <i>Line Defaults</i> section</p> 
	<p>Line Defaults Once information is entered into the Line Defaults fields, it automatically populates each line that is added to the requisition from that point forward. Line fields may be edited (defaults overridden) at the individual line level.</p> <ul style="list-style-type: none"> ◆ Buyer: Name is auto-populated based on your Requester ID ◆ Unit of Measure: Assign here if all lines going forward will have the same Unit of Measure.
	<p>Do not use the defaults page to enter the category and/or the account code, to avoid potential system issues. Please follow the instructions for category and account that are contained later in this exercise.</p>
<p>Step 4.</p>	<p>Click in the Unit of Measure field and enter EA</p>
	<p>We are using the Requisition process to solicit Requests for Bids (RFB). Because of this, no one vendor can be specified as the <i>selected</i> vendor for the RFB requisition. Requests for Bids are always assigned the 9999999999 Vendor ID to process the requisition through the system.</p>
<p>Step 5.</p>	<p>Enter: 9999999999 [10 nines] in the Vendor ID field and tab out.</p>
	<p>The Create Requisition page with vendor id, vendor location and unit of measure populated</p> 
	<p>Because this is a bid requisition, it is unnecessary to search for Contracts.</p>

<p>Step 6.</p>	<p>Scroll down to the Shipping Defaults section.</p> 
	<p>Shipping Defaults</p> <ul style="list-style-type: none"> ◆ Ship To: Auto-populated, based on your Requester ID. The Ship-To code defines the general campus receiving address where goods are to be shipped. This prints on the purchase order. The Ship-To address can be changed by clicking on the Look Up Ship-To icon and selecting a new Ship-To address. Only one Ship-To address may be assigned to a requisition. ◆ Modify Shipping Address: Not in use at this time. ◆ Attention: Defaults from your Requester ID (does not print on the PO).
<p>Step 7.</p>	<p>Scroll down to the Accounting Defaults section.</p>
	<p>Accounting Defaults:</p> <ul style="list-style-type: none"> ◆ Location: Auto-populates based on your Requester ID. The Location field is a code that identifies the operator's room number and building and is used to identify where on campus the goods are to be delivered. This information prints on the purchase order. Location may be changed by clicking on the <i>Look Up Location</i> icon and selecting a different location. Only one Location may be assigned to a requisition. ◆ GL Unit: Auto-populates based on your Requester ID. ◆ SpeedChart: When entered here, populates the budget fields on all lines going forward.
	
<p>Step 8.</p>	<p>Change your Location if needed</p>

	<p>Each requisition line must have a budget (chartfield line) associated with it for pre-encumbrance/encumbrance/payment purposes. A SpeedChart is a tool that simplifies the data entry of budget information.</p> <p>When the SpeedChart number is entered in Accounting Defaults, it automatically populates the budget that is to be charged for any line items entered from that point forward. The chartfield values may be edited at the line level.</p> <p>Once you exit the Tab (or page), the SpeedChart number itself is no longer visible -- it is cleared from the SpeedChart field. The resulting Chartfield values do remain and are visible if you click on another tab and back to Chartfields. (it is not required that you do this)</p>
<p>Step 9.</p>	<p>Click in the SpeedChart field.</p> 
<p>Step 10.</p>	<p>Enter your speedchart and then Tab out of field</p>
<p>Step 11.</p>	<p>Scroll up and Click the UMASS Req Info link.</p> 
	<p>The UMASS Req Info page opens.</p>

	<p>Policy for the use of these radio buttons may vary by campus. One of the three buttons must be selected.</p> <ul style="list-style-type: none"> ◆ Does Not Apply: Default. This is the default. Leave at the default if 'Sole Source' or 'Other' does not apply. ◆ Sole Source: Optional. The policy for the use of the Sole Source radio button varies by campus. Your trainer should be able to explain the policy for your campus. ◆ Other: Optional. Select 'Other' if all the Item(s) and/or Service(s) you are purchasing on your requisition are covered by a contract that was not listed in the Contract dropdown. When 'Other' is selected, another field will open up that will allow you to insert the appropriate contract number.
<p>Step 14.</p>	<p>Click the  Button at the bottom of the page.</p> <p>The Create Requisition page reappears.</p>
<p>Step 15.</p>	<p>Scroll to the bottom of the page and Click the  button.</p>
	<p>The Add Items and Services page appears.</p>  <p>The screenshot shows the 'Create Requisition' page with three tabs: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. Below the tabs is a search bar and a 'Search' button. A dropdown menu titled 'Select a Request Type' is open, showing four options: 'Special Item', 'Fixed Cost Service', 'Variable Cost Service', and 'Time and Materials'. The 'Special Request' tab is highlighted, and a callout box points to it with the text 'Special Request'. At the bottom of the dropdown, there is a 'Review and Submit' link.</p>
<p>Step 16.</p>	<p>Select the Special Request Tab, if it is not already selected.</p>

Step 17.

Click on the [Special Item](#) link.

Special Item

Catalog Favorites Templates Forms Web **Special Request**

Select a Request Type

Special Item	Request an item that is not listed in the Catalog.
Fixed Cost Service	Request a one-time service for a flat fee.
Variable Cost Service	Request a service for which the fee is based on the time worked.
Time and Materials	Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

The **Create Requisition – Add Items and Services - Add Item** page appears. This is where you add your individual LINE ITEMS

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms Web **Special Request**

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

*Vendor ID: TEMPORARY VENDOR CODE

Vendor Item ID: *Vendor Location


Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Fields marked with an asterisk * are required fields

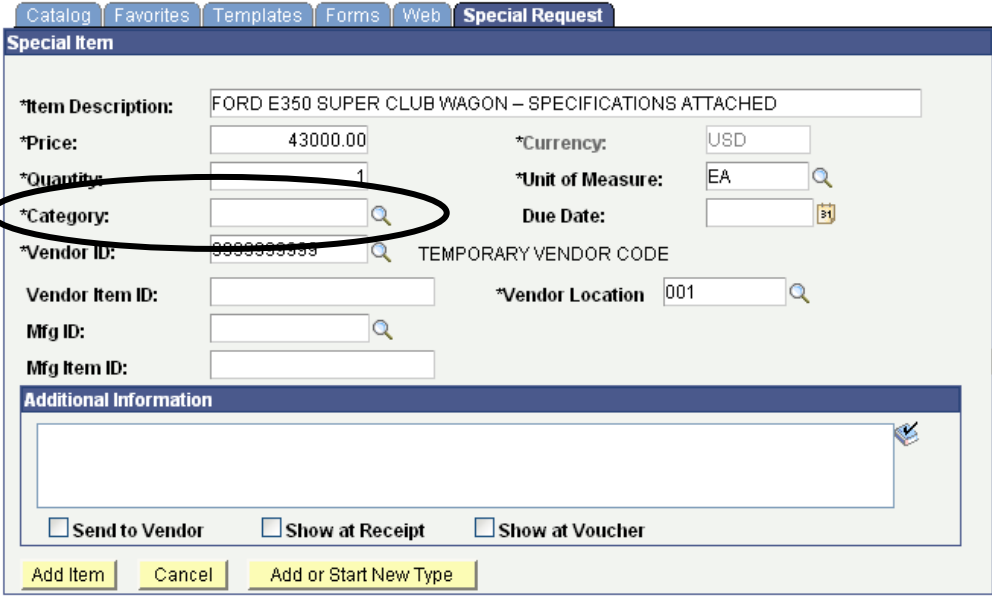
 **Special Item** section:

- ◆ **Item Description:** **Required.** Enter the description of what you are ordering. Include manufacturer's name and number, if applicable, and a complete description of the item.
- ◆ **Price:** **Required.** Enter the unit price of the Item you are ordering.
- ◆ **Quantity:** **Required.** Enter the quantity of the item(s) you are ordering.
- ◆ **Unit of Measure:** **Required.** Auto-populated if entered on the Line Defaults page. Enter the Unit of Measure for each item ordered for Description-only Requisitions.
- ◆ **Category:** **Required.** Click on the Look up Category icon to select the appropriate category for the line. When selected here, the matching account code will auto-populate the account code field in Chartfield 1 on the distribution. See the front of this guide, *Understanding Categories*, for an explanation of Category and how it is used.
- ◆ **Vendor ID:** **Required.** Auto-populates from the vendor previously selected in Define Requisition.
- ◆ **Vendor Location:** **Required.** Auto-populates from the vendor selected in Define Requisition.
- ◆ **Additional Info:** **Optional.** Enter any line-specific comments related to the purchase.

Step 18. **Enter** information in the following fields:

Item Description:
Price:
Quantity:

Step 19.




The screenshot shows the 'Special Item' form with the following fields and values:



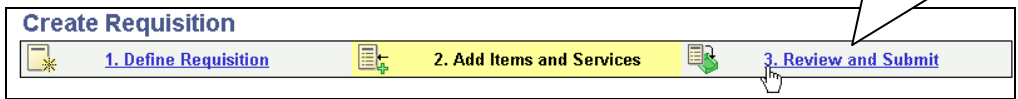
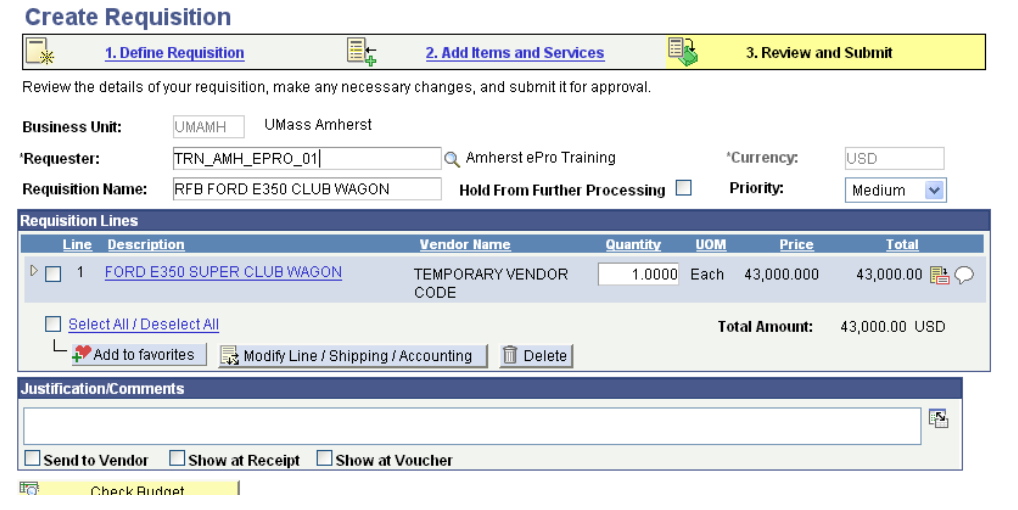

- *Item Description: FORD E350 SUPER CLUB WAGON – SPECIFICATIONS ATTACHED
- *Price: 43000.00
- *Quantity: 1
- *Category: (empty field with a red circle around it and a red arrow pointing to the lookup icon)
- *Currency: USD
- *Unit of Measure: EA
- *Vendor ID: 0000000000 (TEMPORARY VENDOR CODE)
- *Vendor Location: 001





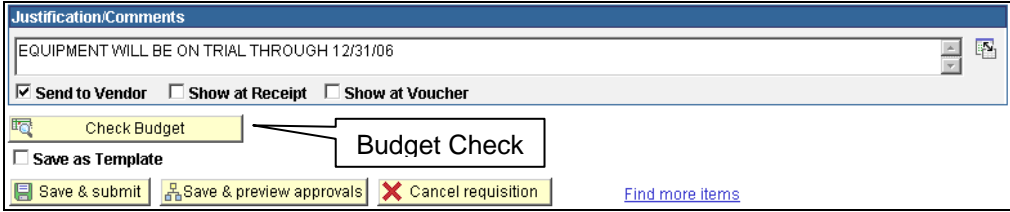


Additional Information section includes checkboxes for:

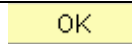
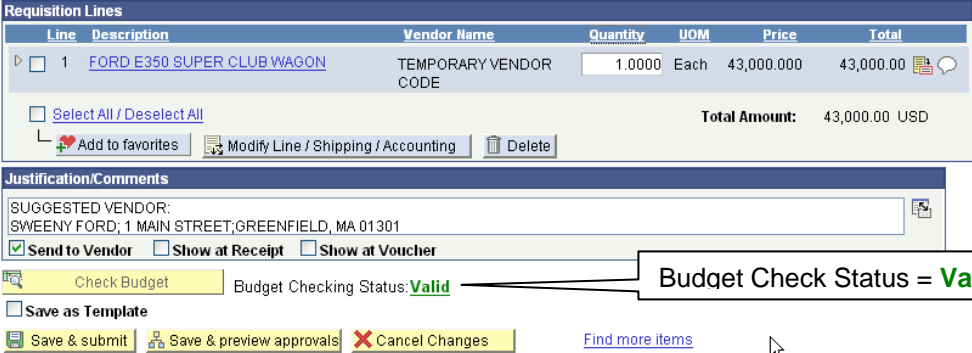

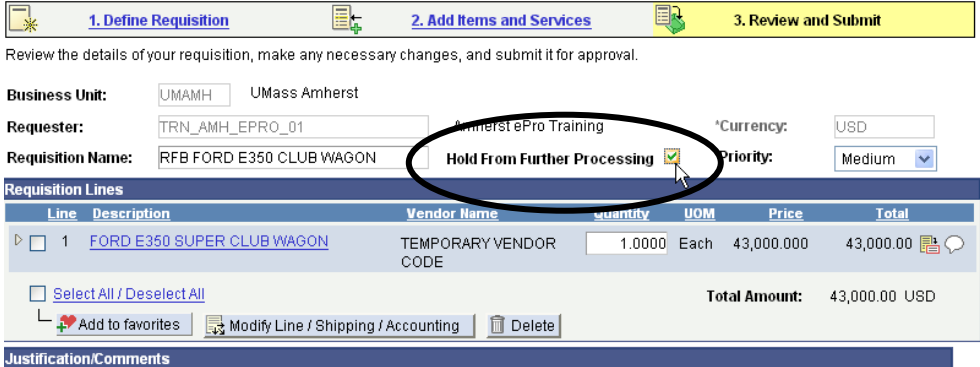

- Send to Vendor
- Show at Receipt
- Show at Voucher


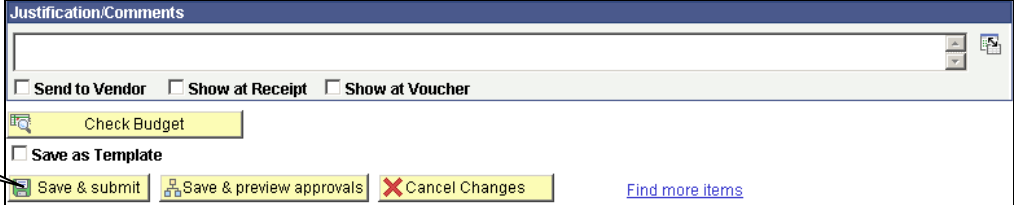
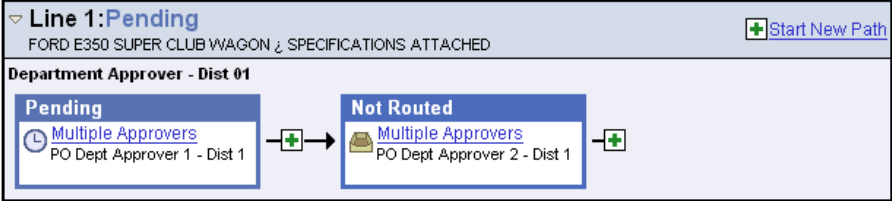

Buttons at the bottom: Add Item, Cancel, Add or Start New Type

Click on the Category Lookup Icon  to search for a product category and enter the category. You may also directly enter the category in the field if you know it.

<p>Step 20.</p>	<p>Click the Add Item button to add this line-level item to the requisition.</p>
	<p>The Add Items and Services, Special Request Tab reappears.</p>
	<p>All fields in the Special Item section of the Special Request Tab are blank except the Vendor ID and Vendor Location – the system is ready for an additional line.</p>
	<p>Once a Line has been added to the requisition, the defaults for that line cannot be changed by using the Define Requisition tab. <i>Existing</i> lines can be changed either at the line level or by using the Modify Line/Shipping/Accounting page.</p> <p>Defaults for new lines going forward can be established by going back to the Define Requisition tab and changing the values there.</p>
<p>Step 21.</p>	<p>Click the Review and Submit Tab link on the Create Requisition page.</p> <div data-bbox="391 940 1404 1037">  </div>
	<p>The Review and Submit Tab appears on the Create Requisition page.</p> <div data-bbox="391 1129 1404 1635">  </div>
	<p>Because we are soliciting a Request for Bids (RFB) through the Requisition process, bids from multiple vendors will be sought by the Procurement Department. Use this section to list all known vendors to which you and your department wish bids to be sent. The Procurement Department may add additional vendors to your list.</p>

<p>Step 22.</p>	<p>Enter the following in the Justification/Comments box:</p> <p>SUGGESTED VENDOR: SWEENEY FORD; 1 MAIN STREET;GREENFIELD, MA 01301</p>
	<p>Justification Comments field allows you to type more than can be displayed on the page. To review and edit your typing, use the Arrow Keys on your keyboard to navigate within the field, or use the scroll bar at the right end of the field</p>
<p>Step 23.</p>	<p>Click the Send to Vendor checkbox.</p> 
	<p>Clicking the Send to Vendor checkbox ensures that the Comments will print on any copy of the Requisition/RFB that might be needed by Procurement to execute the RFB.</p>
	<p>The Bid Number and the Bid Opening date will be added to the Justification Comments section of the requisition by the Procurement Department Buyer to whom this RFB is assigned at a later time, after the buyer has reviewed the requisition.</p> <p>Here is an <i>example</i> of what the Procurement Department Buyer might enter:</p> <ul style="list-style-type: none"> • BIDNUMBER: AA06-JM-0088 • BID OPENS: 12/16/06 <p>(DO NOT ENTER THIS INFORMATION INTO THE COMMENTS SECTION)</p>
<p>Step 24.</p>	<p>Scroll to the bottom of the Create Requisitions page.</p> 
<p>Step 25.</p>	<p>Click the  button.</p>
<p>Step 26.</p>	<p>A message appears to warn you that the requisition will be saved to an Open status before budget checking will occur.</p> <p>Budget Checking will save your requisition in an Open Status. (18036,39)</p> <p>In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition without budget checking.</p> 

<p>Step 27.</p>	<p>Click the  button.</p>
	<p>When the processing has finished, the Budget Checking Status will display as Valid.</p>  <p>The screenshot shows a table with one line item: 'FORD E350 SUPER CLUB WAGON' with a quantity of 1.0000 and a price of 43,000.00. Below the table, the 'Budget Checking Status' is displayed as 'Valid'. A callout box points to this status with the text 'Budget Check Status = Valid'.</p>
	<p>The Budget Checking Status should = Valid. If the Budget Status = Error, click on the Error link to view the reason for the budget error. Requisitions in budget error can be approved, but they cannot be sourced to a purchase order until the budget error is corrected and the Budget Status on the requisition = Valid. If you get a budget status of Error on a requisition, you need to work with the appropriate people to correct it.</p>
<p>Step 28.</p>	<p>Click the Hold from Further Processing Checkbox to ensure that the requisition is not sourced to a purchase order accidentally before Procurement has a chance to solicit the requests for bids.</p> <p>Edit Requisition</p>  <p>The screenshot shows the 'Edit Requisition' form. The 'Hold From Further Processing' checkbox is checked and circled in red. Other fields include Business Unit (UMAMH), Requester (AMherst ePro Training), and Requisition Name (RFB FORD E350 CLUB WAGON). Below the form is a table with one line item: 'FORD E350 SUPER CLUB WAGON' with a quantity of 1.0000 and a price of 43,000.00.</p>
	<p>Hold from Further Processing Checkbox will prevent the requisition from becoming a purchase order but it will not prevent it from going through Approval Workflow</p>

	<p>To save the requisition, but not submit the requisition to Workflow, click the Save & preview approvals button. Requisitions that are not submitted to Workflow will not be reviewed or approved and they will not be sourced to purchase orders. They can, however, be budget checked.</p>												
<p>Step 29.</p>	<p>Click the Save & submit button to save the requisition and submit it to Workflow.</p> 												
	<p>The Requisition Confirmation page opens. Make note of your requisition ID</p> <p>Confirmation</p> <table border="0"> <tr> <td>Requested For: Amherst ePro Training</td> <td>Number of Lines: 1</td> </tr> <tr> <td>Requisition Name: RFB FORD E350 CLUB WAGON</td> <td>Total Amount: 43,000.00 USD</td> </tr> <tr> <td>Requisition ID: R000017709</td> <td>Justification: SUGGESTED VENDOR: SWEENEY FORD; 1 MAIN STREET; GREENFIELD, MA 01301</td> </tr> <tr> <td>Business Unit: UMAMH</td> <td></td> </tr> <tr> <td>Priority: Medium</td> <td></td> </tr> <tr> <td>Budget Status: Not Checked</td> <td></td> </tr> </table> <p>Department Approval</p> 	Requested For: Amherst ePro Training	Number of Lines: 1	Requisition Name: RFB FORD E350 CLUB WAGON	Total Amount: 43,000.00 USD	Requisition ID: R000017709	Justification: SUGGESTED VENDOR: SWEENEY FORD; 1 MAIN STREET; GREENFIELD, MA 01301	Business Unit: UMAMH		Priority: Medium		Budget Status: Not Checked	
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Business Unit: UMAMH													
Priority: Medium													
Budget Status: Not Checked													
	<p>Any Approvals that are required for the requisition are displayed. You may view the approvers by clicking on the Multiple Approvers link under the status (Status = Pending). If you were an approver for this requisition, you would need to access the approval page to post your approval by clicking on the Worklist link. Workflow Approvals are covered in detail in the Approval job aid.</p>												
<p>END OF EXERCISE</p>													