

Catalog Order Guide ~ Sourced to Stores and Vendor

The University maintains several Inventory Business Units (also known as Stores or Warehouses) throughout campus that offer commonly used supplies. Over 70,000 items are available for campus and hospital to choose from. These products can be purchased through Catalog Orders that are accessed via PReqs and may be sourced from multiple Inventory Store (or Warehouse) units per order. Catalog Orders also allow purchase of Non-Inventory supplies that can be sourced from multiple vendors. Both types of orders leverage the University’s buying power to assure the lowest prices and quick delivery of the material required for our daily operations. One order may contain items from multiple warehouse and/or multiple vendor items.

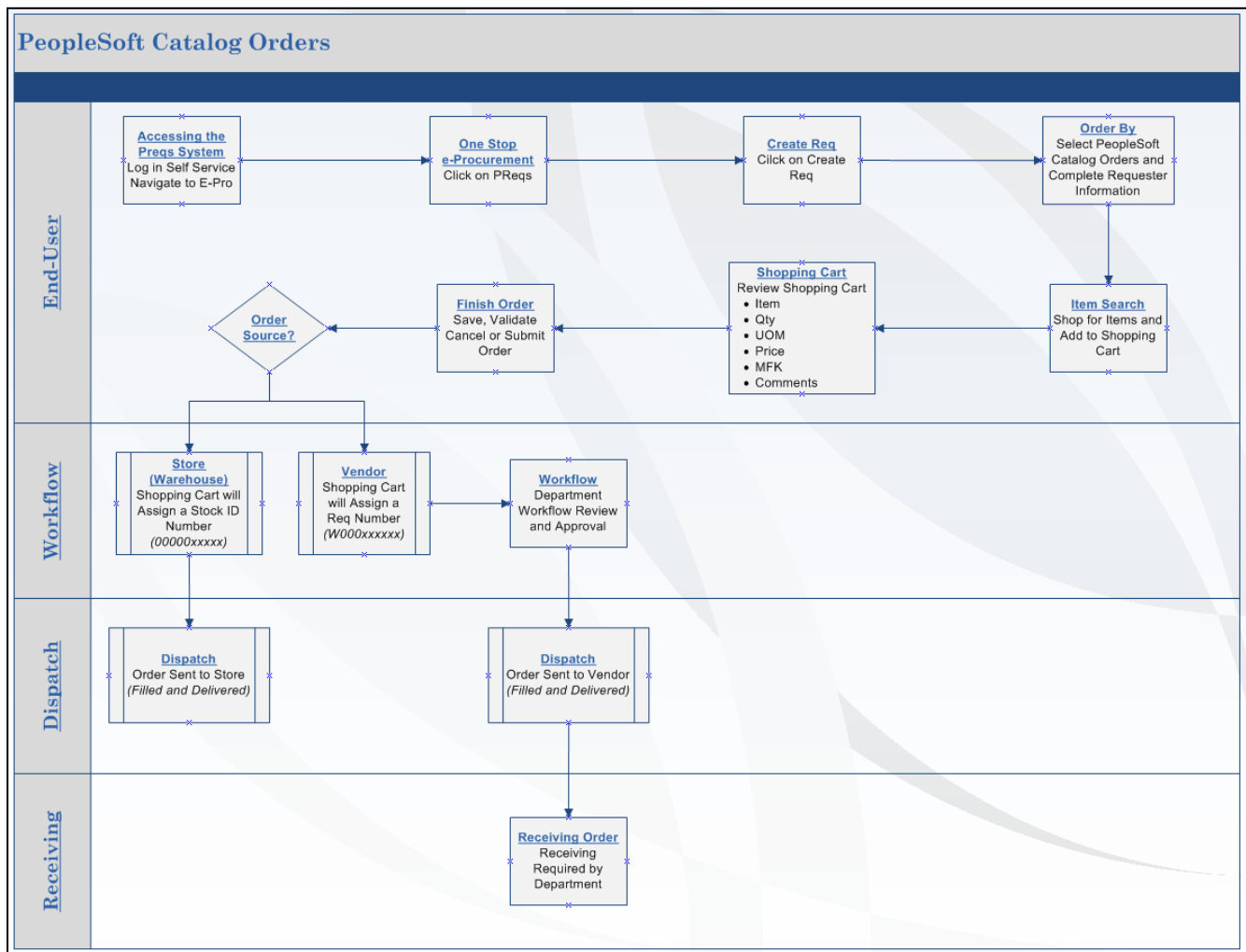
Requesters will need to complete a PReqs access form before access to the specific catalogs can be granted. Access to catalogs is based upon your position, department and job responsibilities.

This guide demonstrates the steps to order goods using PeopleSoft Catalog Orders through the PReqs System. These goods are assigned a PeopleSoft Item Number and have been contracted through UI Purchasing. PS Catalog Orders save time and provide a simple method to order items for a department. They provide the end-user the flexibility to buy items in a central location using one method, while the system auto generates the Order to each UI Store Unit and/or to each Vendor. Also, these Orders do not require additional Purchasing Workflow for approval because the items have already been contracted. So once the Shopping Cart Order or Requisition has been approved through Departmental Workflow, the order is sent directly to the UI Store or Vendor.

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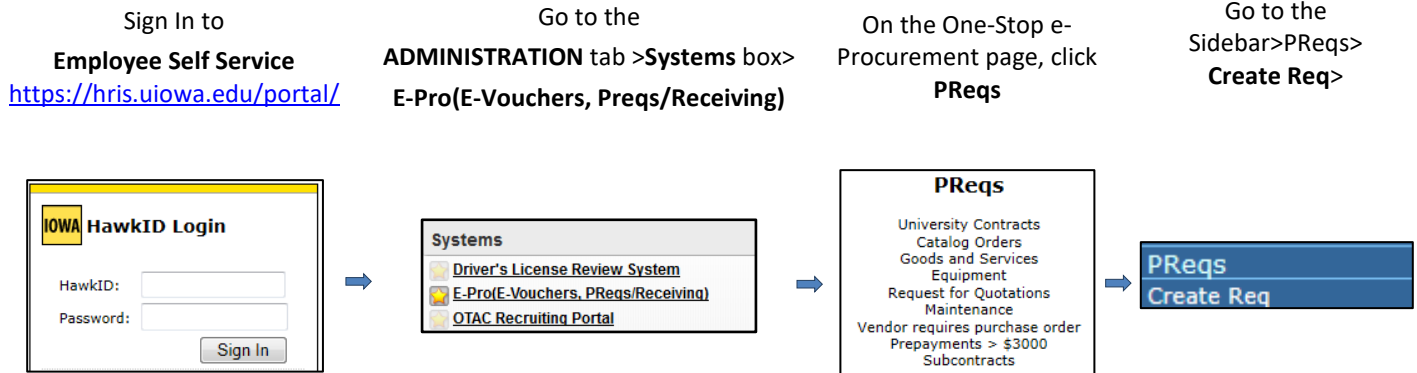
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Below is a diagram that outlines the steps from beginning to end on processing PS Catalog Orders.



Accessing System

To access Catalog Orders/Purchase Requisitions (PREqs), go to <https://hris.uiowa.edu/portal/>.



Note: Your web browser must support encryption and have cookies enabled in order to login. We recommend using Internet Explorer to take advantage of the many features within Purchase Requisitions.

PReqs Home

Requisitions

[Browse](#) 6 requisitions in workflow.
[Browse](#) 0 draft requisitions.
[Browse](#) 0 today's requisitions.
[Browse](#) 0 created during the past 5 days.
[Browse](#) 6 created during the past 30 days.
[Browse](#) 6 created during the past 60 days.
[Browse](#) 6 all of my requisitions.
[Search my requisitions.](#)

Inventory Catalog Orders *

[Browse](#) 9 Draft
[Browse](#) 0 In Progress
[Browse](#) 5 Complete
[Browse](#) 0 Cancelled within the last 30 days
[Browse](#) 14 All of my Stock Orders
[Browse](#) 2 Recurring Orders
[Search my orders.](#)
* Supply Items sourced from a Warehouse and/or Vendor

Purchase Orders

[Browse](#) 1 today's purchase orders.
[Browse](#) 3 created during the past 5 days.
[Browse](#) 10 created during the past 30 days.
[Browse](#) 10 created during the past 60 days.
[Browse](#) 11 all of my purchase orders.

eBuy Shopping Carts

[Browse](#) 1 Draft eBuy Shopping Carts
[Browse](#) 0 today's eBuy Shopping Carts
[Browse](#) 0 loaded from eBuy the past 5 days
[Browse](#) 2 loaded from eBuy the past 30 days
[Browse](#) 2 loaded from eBuy the past 60 days
[Browse](#) 3 All of my eBuy Shopping Carts

PReqs Home

You should now be at PReqs Home page. You can view Requisitions, Purchase Orders, Catalog Orders and eBuy Orders by clicking on the **Browse** next to the appropriate list.

The PReqs Home Page is where the Initiators can browse and check the status of the requisitions, purchase orders, and catalog orders they created. You will not be able to see orders created by other Initiators on this page. This page shows only your own work. This is where Initiators will keep track of their Warehouse orders to see when they complete and Vendor orders to see when a purchase order number is assigned.

Catalog Order Section

Browse Draft – Order where the submit button has not been pressed.

Browse In Progress – Order that has at least one stock item that has not been sourced in PeopleSoft

Browse Complete – Order that has been submitted with only non-stock items, or has stock items that have all been sourced or cancelled

Browse Cancelled within the last 30 days – Order with at least one stock item that has been cancelled

Browse All my Stock Orders – Shows all stock orders

*Supply Items sourced from a Warehouse will only list under the Catalog Order section

*Supply Items sourced from a Vendor will list under Catalog Order section until a user has clicked submit, then will list under Requisition and Purchase Order section.

Requisition Section

Browse Requisitions in Workflow will display a list of requisitions that have the status of **Inside Workflow** or **Sent to Workflow**.

Inside Workflow means that the requisition is actually inside the Workflow system and is waiting for one or more approvals. **Sent to Workflow** means that the requisition has been finalized and sent to Workflow, but has not actually entered the Workflow process.

Browse Draft Requisitions will display a list requisitions that have been saved as a draft copy, but have not yet been completed, validated, and sent to Workflow.

Browse Today's Requisitions will display a list of requisitions that the Initiator created on the current day.

Created During the Past 5, 30, and 60 days and **All of My Requisitions** will list requisitions based on the specific list title.

After you click on any one of these **Browse** lists, the system takes you to the Requisition Center.

Requisition Center

| Req # | Req Date | End User | Status | Vendor Name | Req Amt | Description | Attach |
|----------------------------|------------|---------------|-----------------|---|--------------|--------------------------------|----------|
| W000116334 | 2007-08-22 | David Bergeon | Inside Workflow | Koch Brothers | \$ 7,040.00 | Lanier LD435c copier Mainfram | Y |
| W000116337 | 2007-08-22 | Dan Felderman | Inside Workflow | Extem Prep Systems Incorporated Division Of Medi Dose Group | \$ 8,925.50 | EPS211633-S, 15ml Sterile Drop | |
| W000116338 | 2007-08-22 | Gwen Jarosh | Inside Workflow | Frohwein Office Plus | \$ 19,905.91 | 0082201 CMAB Renovate Suite 20 | |
| W000116369 | 2007-08-23 | Senor Pablo | Inside Workflow | City Of Coralville | \$ 3,100.00 | Blanket order for water & sewe | |

PReq Status Section

The definitions for the requisition statuses are:

Inside Workflow -Requisition inside Workflow waiting for one or more approvals

Sent to Workflow - Requisition that has been validated and sent to Workflow, but has not yet entered the Workflow process

Draft - Requisition saved as a draft copy that has not yet been validated or Sent to Workflow.

Workflow Void - Requisition voided in Workflow

Deleted - Requisition deleted by the Initiator before the Approvers received it in Workflow. There should be an

internal comment entered on the Requisition explaining why it was deleted.

Workflow Complete - All approvers have approved the requisition and the Purchase Order number has been assigned. See the Purchase Order Center for the PO number. After the PO number has been assigned the requisition will upload to PeopleSoft.

To view a requisition in the list, click on the Requisition #. And the PReq form will be displayed.

Click on **Back** to return to **My Home Page**.

PReqs Home

Requisitions

[Browse](#) 18 requisitions in workflow.

[Browse](#) 1 draft requisitions.

[Browse](#) 0 today's requisitions.

[Browse](#) 0 created during the past 5 days.

[Browse](#) 1 created during the past 30 days.

[Browse](#) 9 created during the past 60 days.

[Browse](#) 19 all of my requisitions.

[Search my requisitions.](#)

Purchase Orders

[Browse](#) 0 today's purchase orders.

[Browse](#) 0 created during the past 5 days.

[Browse](#) 0 created during the past 30 days.

[Browse](#) 35 created during the past 60 days.

[Browse](#) 162 all of my purchase orders.

Under **Purchase Orders** on the Home Page you can view purchase order numbers that have been assigned on the current day or in the past 5, 30, or 60 days. You can also view all of the purchase orders created from your PReqs.

When you click on **Browse** in this section, the system takes you to the Purchase Order Center.

Purchase Order Center

| Req # | End User | PO ID | PO Date | PO Type | PO Status | Vendor Name | Req Amt | Description | Attach |
|----------------------------|---------------|----------------------------|------------|------------------|------------|------------------------------------|-------------|--------------------------------|----------|
| W000116333 | Julie Bergeon | 1000603980 | 2007-08-23 | RFQ Order | Dispatched | Thomson Healthcare Incorporated | \$ 7,287.00 | Three Year SubsciRenewal To Mi | Y |
| W000116335 | Gwen Jarosh | 1000604050 | 2007-08-27 | Quote | Approved | Sartorius BBI Systems Incorporated | \$ 5,000.00 | Installation of items purchase | |
| W000116339 | Julie Bergeon | 1000604051 | 2007-08-27 | Confirming Order | Approved | Thomson Shore Incorporated | \$ 4,087.00 | Nelson-Printing 750 cloth book | |
| W000116340 | David Bergeon | 1000603981 | 2007-08-23 | Regular Order | Dispatched | Stott Pilates | \$ 2,317.50 | ST 01019 USReformer-Group SPX | |

Purchase Order Status Section

The definitions for the Purchase Order statuses are:

Open: The PO has been uploaded to PeopleSoft, but has not been finalized by Purchasing or dispatched to the vendor. Funds are not yet encumbered.

Approved: The PO has been verified and finalized by Purchasing. The order will be dispatched to the vendor on the next working day after it is approved.

Dispatched: The PO has been sent to the vendor via fax or mail. Funds are encumbered. It can now be vouchered.


Complete: The PO has been fully vouchered and has gone through PO Recon. Once an order is complete it cannot be reactivated. Funds are no longer encumbered.

Cancelled: The PO has not been vouchered and has been cancelled by Purchasing. Funds are no longer encumbered.

Initiators can click on the PO ID to view the PO report on-line on the AP-PO Web Application. If the PO status is blank, the PO report is not yet available. The PO report will be available as soon as the order has uploaded to the PeopleSoft System. This is the Business Financial System Software currently being used by Purchasing and Accounts Payable. Departments need to view the PO Report for accuracy. Contact the Buyer at once regarding any discrepancies.

Favorites

Favorites is for saving frequently used information and can be added throughout the PReq by clicking [add](#). You may also have the option to add this information manually.



e-Voucher **PReqs** **eBuy** **ProTrav**

ID: -
WF Tx#: -
Date: -

User: creedl

Self Service / FO Logout

PReqs

Create Req
Req Search Center
Catalog Order Search
Copy Req
Copy Order
Find UI Contract

► Favorites

MFK Favorites

| # | Act | BookmarkName |
|---|-------------------------------------|--|
| 1 | <input checked="" type="checkbox"/> | 0500500000000005064910060-€ |
| | | fund org dept sdept grnt/prgm iact oact dact fn cctr slid slac |
| | | 050 05 0310 00000 50649100 6235 000 00000 60 0000 |
| 2 | <input checked="" type="checkbox"/> | 1-PURCHASING TEST |
| | | fund org dept sdept grnt/prgm iact oact dact fn cctr slid slac |
| | | 050 05 0310 00000 50649100 6235 000 00000 60 0000 |
| 3 | <input checked="" type="checkbox"/> | 2401700000100005351583121-€ |
| | | fund org dept sdept grnt/prgm iact oact dact fn cctr slid slac |
| | | 240 17 3215 10000 53515831 6405 999 00000 21 7604 |

Under **Favorites** on the side bar, click on the **MFK** to get to this screen.

The **Bookmark Name** is a title you assign to the Favorite to identify and remember it by. It can be anything you want.

Fill in the MFK fields and click [Save](#)

Click [Add](#) to add another.

Always remember to save after adding any new entries.

Leave IACT and OACT blank for catalog orders. These values will default from the item.

When you click **End User** under **Favorites** you may click **Add via EndUser Search** to add new EndUser's to your favorites. This will allow you to search by HawkID or name. After clicking **Find User** click the [HawkID](#) link to add. For existing favorites you can update the **Bookmark Name** and/or **HawkID**. When your done click [Save](#)

EndUser Favorites

| # | Act | BookmarkName |
|---|-------------------------------------|--------------------|
| 1 | <input checked="" type="checkbox"/> | Christine L Leichy |

| hawkid | name | phone | email | department | location |
|---------|--------------------|--------------|------------------------|-----------------|----------|
| cleichy | Christine L Leichy | 319/335-0384 | chris-leichy@uiowa.edu | VPFO-Purchasing | 202 PCO |

Update HawkID

[Save](#) [Add via EndUser Search](#)

HawkID Search

User HawkID:

First Name:

Last Name:

[Find User](#)

| Hawk ID | Name | Phone | Email | Department | Location |
|---------|--------------------|--------------|------------------------|-----------------|----------|
| cleichy | Christine L Leichy | 319/335-0384 | chris-leichy@uiowa.edu | VPFO-Purchasing | 202 PCO |

EndUser Favorites

- [Chris Leichy](#)
- [Colleen Bauer](#)
- [Gwen Jarosh](#)
- [Julie Bergeon](#)
- [Senor Pablo](#)
- [Sharon Doak](#)

Wherever you see the  a window displays a list of your favorites.

Here are examples of the other Favorites screen. Create your own Favorites for all the fields listed.

Vendor Favorites

| # | Act | BookmarkName |
|--------|---------|--------------------------------|
| 1 | | Sourcecorp BPS Incorporated |
| ID | Address | Location |
| 360220 | 1 | 1 |
| 2 | | AAA Mechanical Contractors Inc |
| ID | Address | Location |
| 100015 | 1 | 1 |

Save Add Add via Vendor Search

Category Favorites

| # | Act | BookmarkName |
|----------|-----|--------------------------------|
| 1 | | Business use papers Paper (Che |
| ID | | |
| 14111800 | | |
| 2 | | Formulas and products for nutr |
| ID | | |
| 42231800 | | |

Save Add Add via Category Search

Receiver Favorites

| # | Act | BookmarkName |
|----------|-----|--------------|
| 1 | | cleichty |
| Hawk ID | | |
| cleichty | | |
| 2 | | heefner |
| Hawk ID | | |
| heefner | | |

Save Add

RequestedBy Favorites

| # | Act | BookmarkName |
|----------------------|--------------|-------------------------|
| 1 | | Christine L Leichty |
| name | hawkid | department |
| Leichty, Christine L | cleichty | VPFO-Purchasing |
| location | phone | email |
| 202 PCO | 319/335-0384 | chris-leichty@uiowa.edu |
| 2 | | Michael J Adam |
| name | hawkid | department |
| Adam, Michael J | mjadam | VPFO-Purchasing |
| location | phone | email |
| 211 PCO | 319/335-1861 | michael-adam@uiowa.edu |

Save Add via RequestedBy Search

Asset Favorites

| # | Act | BookmarkName |
|------------------------|-------------|----------------------|
| 1 | | Leichty, Christine L |
| Bldg Abbr | Room Number | Asset Custodian |
| PCO | 202 | |
| Asset Custodian HawkID | | Asset Custodian Dept |
| cleichty | | 031000000 |
| 2 | | Mike Adam |
| Bldg Abbr | Room Number | Asset Custodian |
| PCO | 202 | Adam, Michael J |
| Asset Custodian HawkID | | Asset Custodian Dept |
| mjadam | | 0310 |

Save Add

Create New Order

PReqs

Create Req
Req Search Center
Catalog Order Search
Return to Order
Copy Req
Copy Order

Click on the **Create Req** link on the side bar and you'll get the **Order By** page below

Note: If **Create Req** is grayed out, a Requester must fill out a **PReq Access** form to get the initiator signed up. See **PReqs Access** link on side-bar

Forms

PReqs Access
Item Form
Ship to Codes
Vendor Codes

Order By

[crutchy.ds.uiowa.edu/001/grc/faces/](#)

Select one of the following to order by:

- ☐ **Purchase Requisition**- This requisition will be used to order by contract or by description for services, equipment, repairs and blanket orders that go to an outside vendor.
- ☐ **eBuy Shopping**- This selection will direct you to prime vendor contracts.
- ☒ **PeopleSoft Catalog Orders**- This selection will be used to order PeopleSoft item number products that are sourced from Hospital Process Stores, General Stores, Dentistry Stores, and College of Pharmacy Stores or from a vendor. [Shopping Cart Favorites](#) [Recurring Orders](#)

Order By Page

Select **PeopleSoft Catalog Orders**.

All fields on the **Order By** page are required.

Requester Information

Requester:
HawkID: CLEICHTY
Location: PCO-202-04
Phone: 319/335-0384
Department: Purchasing
Email: chris-leichty@uiowa.edu

Ship To:
Description: Leichty,Chris PCO-202
Address: The University of Iowa
Purchasing AP & Travel
PCO-202
125 S Dubuque St
Iowa City, IA 52242-2500
Phone: 319/335-0384
Fax:

End User HawkID: ?
Name: Michael J Adam
Location: 211 PCO
Phone: 319/335-1861
Department: VPFO-Purchasing
Email: michael-adam@uiowa.edu

The Requester(s) you have been approved to use will be listed in the drop-down menu next to Requester:

Click down arrow next to the Requester: field and click on the Requester name that you want to use and it will populate the Requester information and corresponding Ship To information on the main screen.

Requester:

HawkID: Bergeon,Julie
Location: Leichty,Chris

Requester Information

Requester:
HawkID: CLEICHTY
Location: PCO-202-04
Phone: 319/335-0384
Department: Purchasing
Email: chris-leichty@uiowa.edu

Ship To:
Description: Leichty,Chris PCO-202
Address: The University of Iowa
Purchasing AP & Travel
PCO-202
125 S Dubuque St
Iowa City, IA 52242-2500
Phone: 319/335-0384
Fax:

End User HawkID: ?
Name: Michael J Adam
Location: 211 PCO
Phone: 319/335-1861
Department: VPFO-Purchasing
Email: michael-adam@uiowa.edu

Continue

Requester: This information is used to identify the person in the department who works directly with Purchasing and Accounts Payable to facilitate the procurement and payment process. Requesters may be contacted by Purchasing, Accounts Payable, or the vendor if a question arises regarding the Order.

Ship To Code: The Ship To Code fills in automatically according to the Requester you've selected. This code identifies the location to which the merchandise being ordered is to be sent.

End User: The End User is the member of your department requesting the good or services. Enter manually by typing in the HawkID for the End User or use the Search function to populate.

Remember: These can be used with the Favorites function and [add](#) link.

This MFK will default in on the Catalog Orders and can be changed if needed.

Default MFK

050 05 0311 00000 50649100 6026 000 00000 60 0000

Catalog Access

| SetID | Catalog | Description |
|-------|--------------------|----------------------------|
| UIOWA | UH_ASC | Ambulatory Surg Center |
| UIOWA | UH_CATH_LAB | Cath Lab |
| UIOWA | UH_CSS | Central Sterilization Serv |
| UIOWA | UH_MOR | Main Operating Room |
| UIOWA | UH_PROCESSED_STORE | Processed Stores Hospital |

Catalog Access: Requesters/Initiators must be assigned specific catalogs in order to be able to access the catalog and order the item in the catalog. This is a list of the catalogs you have access to.

Click the **Continue** button to continue to the Item Search Page.

Shop for Items

[Search](#) **QuickShop** [Add to Cart](#) **MiniCart:** 0 item(s)

[OrderBy Page](#) [Go to Shopping Cart](#) [Items Help](#) I want to see 10 items per page.

Match any criteria

UI Item #:

Description:

Manufacturer Name:

Manuf Item ID:

Vendor Name:

Vendor Item ID:

Vendor ID:

Catalog: ☒

Category:

Alias:

Old Item ID:

Filter search by: ☐ Warehouse ☐ Vendor ☒ None

[Go to Shopping Cart](#)

[Collapse All](#) [Expand All UOM](#) [Expand All Mfg Info](#) [Expand All Vendors](#)

No items found. 1

| UI Item # | Vendor Item ID | Description | UOM Price | UOM | Manuf Name | Manuf Item ID | Sourcing from | Order Qty |
|--------------------------|----------------|-------------|-----------|-----|------------|---------------|---------------|-----------|
| Nothing found to display | | | | | | | | |

[Collapse All](#) [Expand All UOM](#) [Expand All Mfg Info](#) [Expand All Vendors](#)

[OrderBy Page](#) [Go to Shopping Cart](#)

The first field is a global search which searches the description, manufacture name, manufacture item id, and vendor item id.

If the user knows the UI Item id, then you may type this in the **QuickShop** field and click [Add to Cart](#). It will then be placed in your shopping cart. Click [Go to Shopping Cart](#) if you want view its contents.

On the item search page, you may search for items using many different criteria. You can narrow search by putting information in multiple fields and using any or all match criteria in the drop-down. default (Match any criteria) will result in items with at least one of the criteria typed. Selecting all result in items with all criteria typed.

You must select one field to search on. The search will find entries where your search is part of a word and will ignore capitalization.

Match any criteria

Match any criteria

Match all criteria

your
The
will

Item Search Results

Match all criteria ☒

| | | | |
|---------------------------|----------------------|------------------------|---|
| UI Item #: | <input type="text"/> | Description: | <input type="text" value="syringe"/> |
| Manufacturer Name: | <input type="text"/> | Manuf Item ID: | <input type="text"/> |
| Vendor Name: | <input type="text"/> | Vendor Item ID: | <input type="text"/> |
| Vendor ID: | <input type="text"/> | | |
| Category: | <input type="text"/> | Catalog: | Processed Stores Hospital <input checked="" type="checkbox"/> |
| Old Item ID: | <input type="text"/> | Alias: | <input type="text"/> |

Filter search by:

☐ Warehouse

☐ Vendor

☒ None

[Go to Shopping Cart](#)

[Collapse All](#)

[Expand All UOM](#)

[Expand All Mfg Info](#)

[Expand All Vendors](#)

68 items found, displaying 61 to 68

[[First/Prev](#)] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#) [[Next/Last](#)]

| UI Item # | Vendor Item ID | Description | UOM Price | UOM | Manuf Name | Manuf Item ID | Sourcing from | Order Qty |
|------------------------|----------------|---|------------|-----|------------------------|---------------|---------------|--------------------------------|
| 906957 | 15356-102A | Syringe Glass 2cc Glass Tip | \$ 10.9400 | EA | POPPER AND SONS | 5009 | UHPSS | <input type="text" value="0"/> |
| 906941 | | Syringe Asepto Irrigation Syringe 50cc | \$ 0.6537 | EA | CR BARD | 0035280 | UHPSS | <input type="text" value="0"/> |
| 906839 | DYND70280 | Bulb Syringe Ear Disposable 2 Oz | \$ 0.4623 | EA | MEDLINE INDUSTRIES INC | DYND70280 | UHPSS | <input type="text" value="0"/> |
| 906825 | S9424-1AA | Syringe Hypodermic Slip Tip Glass Non-sterile 10 Cc | \$ 10.5235 | EA | POPPER AND SONS | 5026/5029 | UHPSS | <input type="text" value="0"/> |



You may also click the **MiniCart:** at the top of the page to view your shopping cart's contents.

A pop-up window is displayed. Click the red X to close.

After you've selected all the items with their quantity, click on [Go to Shopping Cart](#) to complete your order at the top or bottom of the page. The system will take you to the Shopping Cart.

Shopping Cart ~ Ordering Items Sourced to a Warehouse

QuickShop

If you need to add another item click [Continue Shopping](#) or use **QuickShop**. You may also return to the **OrderBy** page or empty your cart.

[OrderBy Page](#) [Continue Shopping](#) [Empty Cart](#)

[Apply this MFK to all lines.](#)

☒ fund ☒ org ☒ dept ☒ sdept ☒ grmt/prgm ☐ iact ☐ oact ☒ dact ☒ fn ☒ cctr ☒ slidslac
☒ 990 17 3215 01000 54000600 0000 ☒ 0000 000000 00 0000

You can still change a MFK, change quantity, or add the item to your favorites.

You can also change the MFK for all line items buy filling in the MFK and clicking "Apply this MFK to all lines" or

only change selected numbers by un-checking the boxes.

Comments: If the Items are sourced to the Warehouse you can enter Comments that will be sent to the UI Store Unit and printed on their Picklist by clicking on the . Once complete, click the [Return to Order](#) and the will update to indicate comments are added.

Business Justification: This is required for each order; please describe the justification for the purchase. Provide enough information to those that are approving the transaction, so everyone understands what they are approving.

Items Sourcing from a Warehouse: This will split out items based on which Warehouse that the items are being sourced from . You have the ability to update the Quantity, Remove the Item or update the MFK. (Items sourcing from the Vendor, see Requisition, Step 4 below)

Complete Warehouse Order: Once all Line Items have been reviewed, you have four options to Complete the Shopping Cart. Click **Save**, to save the Order as is and finish at a later time. Click **Validate** to check errors on the Order, any errors will be outlined in red and must be corrected before you can Submit the Order.

Click **Submit** to finalize order. After clicking Save, Validate or Submit, a 10-digit Shopping Cart ID is assigned to the Order (SC000XXXXX) and once the order has been processed a Stock Request ID is assigned, (0000XXXXXX). Both the Requester and Initiator will get an email, including the Stock Request ID and Shopping Cart ID assigned to the Order. They are also notified if the Order is able to be filled, partially filled or canceled (item will need to be re-ordered) by the Warehouse. The last option if the Order is no longer needed, the end user has the ability to Cancel the Order prior to submitting by clicking the **Cancel** button. **This Completes the Order.**

Save Cart Favorite

Name of Cart Favorite
Save

Save as Recurring: Allow users to set up orders which you place on a daily, weekly, monthly, or yearly basis.

Items Sourcing From a Warehouse:
Comments for the Warehouse

UIHC PROCESSED STORES
Business Justification for This Purchase:

| # | UI Item # | Description | Qty | UOM | Total Price | |
|---|-----------|--|------|-----|-------------|-----------------|
| 1 | 19553 | Adapter Syringe Toomey Storz Sterile Single Wrap | 1.0 | EA | \$ 0.00 | add |
| | add | 050 05 0311 23000 00000000 6070 000 00000 60 0000 | | | | mfk amt \$0.00 |
| 2 | 22578 | Nasal Atomization Drug Delivery Device Without Syringe | 10.0 | EA | \$ 21.70 | add |
| | add | 050 05 0311 23000 00000000 6070 000 00000 60 0000 | | | | mfk amt \$21.70 |
| 3 | 27686 | Syringe Insulin U-100 disp needleless luer lock 1ml | 25.0 | EA | \$ 7.53 | add |
| | add | 050 05 0311 23000 00000000 6070 000 00000 60 0000 | | | | mfk amt \$7.53 |

Warehouse Subtotal: \$29.23
Price: This is the approximate price a user area will be charged upon issue of this item from an inventory area.
Stock Subtotal: \$ 29.23
Order Total: \$ 29.23

Save **Validate** **Submit** **Cancel**

| UI # | Item # | Description | Qty | UOM | Total Price | Status |
|------|--------|--|-----|-----|-------------|-----------|
| 1 | 904269 | SUTURE MONOCRYL UNDYED MONOFILAMENT POLIGLECAPRONE ABSORABL | 2.0 | BX | \$ 137.03 | Complete |
| | | fund org dept sdept grnt/prgm iact oact dact fn cctr slid slac mfk amt | | | | |
| | | 520 17 3215 13000 83047315 6090 400 00000 20 0000 | | | | \$137.03 |
| 2 | 904275 | SUTURE MONOCRYL VIOLET MONOFILAMENT POLIGLECAPRONE ABSORABL | 5.0 | BX | \$ 345.92 | Cancelled |
| | | fund org dept sdept grnt/prgm iact oact dact fn cctr slid slac mfk amt | | | | |
| | | 520 17 3215 13000 83047315 6090 400 00000 20 0000 | | | | \$345.92 |

Status are:

- o **In Progress**-Item has not been sourced from warehouse
- o **Complete**-Item has been sourced and will be shipped
- o **Cancelled**-Item order cannot be filled and will require a new order to be submitted

Stock Status - Windows Interne...

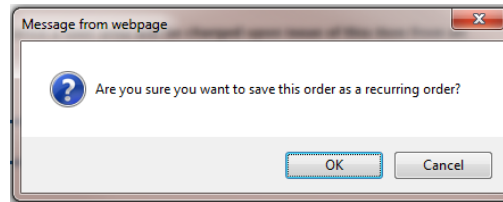
Stock Status
Warehouse: UHCSS
Warehouse Contact: Central Sterilizing Services
Warehouse Phone: 319/356-2534
Pick Date: 09/14/2007 8:43 AM
Ship Date: 09/14/2007 8:43 AM
Cancel Date:

Clicking on **Complete** link will show warehouse information, Pick Date, and Ship Date. Clicking on **Cancelled** will show you the cancelled date.

Recurring Orders

The system will generate your daily, weekly, monthly, or yearly orders and email you when it is ready to be submitted. The order will not be sent to the Vendor or UI Stores until you review and click **Submit**. Recurrences set up to begin on the present date will be created within an hour. Orders set up for a future date will be created at 12M on that day.

Once you have items in your shopping cart, you have the option of saving it as a recurring order. Click [Save as Recurring](#). The system will verify if you want to initiate this. Click OK.



Recurrence Information

- A recurring order is a way to automatically order items on a recurring basis so you don't have to keep re-ordering the same items daily, weekly or monthly. Enter the Recurrence Name, Frequency and beginning and end dates.
- Next order date is checked every hour. Most recurring orders will get created shortly after midnight, on the "next order date". When a new order is created, an email notification will go to the initiator with a link to the order where they will need to review and submit for processing.

[View Orders generated from this recurrence.](#) Recurrence is inactive.

Order Ref:

Recurrence: Next Order Date: End Date:

Save

[Create Order Immediately](#)

March, 2012

| wk | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|----|-----|-----|-----|-----|-----|-----|-----|
| 8 | | | | | 1 | 2 | 3 |
| 9 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 11 | 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 12 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |

Select date

Cancel

[View Orders generated from this recurrence.](#)

Order Ref:

Recurrence: Next Order Date: End Date:

display in your Recurring Order Center from your Home Page.

Recurring Order Center

| Order # | Next Order Date | Recurrence | Order Ref | Status | Total | End Date | Delete |
|----------------------------|-----------------|------------|------------------------|--------------------------|----------|------------|------------------------|
| RC00212315 | | MONTHLY | GS Monthly | Inactive | \$ 49.36 | 2012-01-20 | Delete |
| RC00212317 | | DAILY | Dent Stores Daily | Inactive | \$ 0.00 | 2012-01-20 | Delete |
| RC00212654 | 2012-04-03 | WEEKLY | GS Monday Weekly Order | Active | \$ 98.04 | 2012-04-30 | Delete |

At any time you wish to discontinue the Recurring Orders, simply click the **Delete** link.

After the last recurrence (End Date), the order will be come inactive. Click the RC# to modify it.

[View Orders generated from this recurrence.](#) Recurrence is inactive.

Order Ref:

Recurrence: Next Order Date: End Date:

Next Order Date: End Date:

Enter a new **Next Order** and **End Date** and click **Save** or **Validate**.

If you wish to create a bi-weekly recurring order, add the items to your cart and create the recurring order. Set up the first recurring order for Weekly, every Monday. Click **Copy Order** under **PReqs** on the Sidebar, then set the second order up for Weekly, every Wednesday.

The Recurrence is not active until you enter an Order Reference name, frequency, and beginning/end date.

Save will save the Recurrence and make it Active. When you receive an email that the order was created, you will still need to validate the order (MFK) and Submit.

Validate will validate and save the Recurrence and make it Active. Once you receive an email that the order was created, simply click the SC# and submit the order.

Cancel will cancel the recurrence if you decide a recurrence isn't needed.

If you don't wish to wait for the next order date, you may click the link to create it immediately.

This Recurring Order is now active and will

Inventory Catalog Orders *

- [Browse](#) 74 Draft
- [Browse](#) 3 In Progress
- [Browse](#) 17 Complete
- [Browse](#) 1 Cancelled within the last 30 days
- [Browse](#) 111 All of my Stock Orders
- [Browse](#) 6 Recurring Orders
- [Search my orders.](#)

* Supply Items sourced from a Warehouse and/or Vendor

Shopping Cart ~ Ordering Items Sourced to a Warehouse and Sourced to Vendor

Orders can be combined with items sourced to Warehouse and items sourced to Vendor with or without workflow being required.

Match any criteria ☒

UI Item #: Description:

Manufacturer Name: Manuf Item ID:

Vendor Name: Vendor Item ID:

Vendor ID:

Category: Catalog:

Old Item ID: Alias:

Filter search by: ☐ Warehouse ☐ Vendor ☒ None

[Go to Shopping Cart](#)

[Collapse All](#) [Expand All UOM](#) [Expand All Mfg Info](#) [Expand All Vendors](#)

123 items found, displaying 91 to 100 [\[First/Prev\]](#) [6, 7, 8, 9, 10, 11, 12, 13](#) [\[Next/Last\]](#)

| UI Item # | Vendor Item ID | Description | UOM Price | UOM | Manuf Name | Manuf Item ID | Sourcing from | Order Qty |
|------------------------|----------------|--|-------------|---|----------------------------|---------------|---|--------------------------------|
| 922314 | 55900 | Applicators Wood Plain Non-sterile 6 Inch | \$ 4.5247 | BX(1) | OLON MANUFACTURING COMPANY | 55900 | UHPSS | <input type="text" value="0"/> |
| 922318 | SOLON300 | Tongue Blades Non-sterile Junior | \$ 10.5300 | BX(1) | OLON MANUFACTURING COMPANY | 300 | UHPSS | <input type="text" value="0"/> |
| 922406 | 21-386 | Forceps Tissue Allison 4-5 Teeth Non-sterile 6in | \$ 2.8200 | EA | FINE SCIENCE TOOLS INC | 21-386 | Surgical Advantage - 1 <input type="button" value="+"/> | <input type="text" value="0"/> |
| 922433 | 3195 | Gauze Cut Non-sterile 400 Pieces Per Pack 18 X 18 Inch | \$ 319.9900 | CA(10) <input type="button" value="+"/> | KENDALL HEALTHCARE | 3195 | Covidien - 1 <input type="button" value="+"/> | <input type="text" value="0"/> |
| 922437 | 16-288 | Needle Holder Mayo-hegar Non-sterile 7in | \$ 1.5000 | EA | FINE SCIENCE TOOLS INC | 16-288 | Surgical Advantage - 1 <input type="button" value="+"/> | <input type="text" value="0"/> |

Add your search criteria and click .

This example was displayed by searching for “non-sterile” in the description field.

Notice the **Sourcing from** column; these items are from **Warehouse** and an outside **Vendor**.

Note the number following the Vendor in the **Sourcing from** column shows the vendor priority. “1” being the most favored vendor.

The indicates that items have multiple UOM (units of measure), vendors, and manufacturer.

| | | | | | | | | |
|------------------------|--------|--|-------------|---|------------------------|--------|---|--------------------------------|
| 922406 | 21-386 | Forceps Tissue Allison 4-5 Teeth Non-sterile 6in | \$ 2.8200 | EA | FINE SCIENCE TOOLS INC | 21-386 | Surgical Advantage - 1 <input type="button" value="-"/> | <input type="text" value="0"/> |
| 922406 | 82500 | Forceps Tissue Allison 4-5 Teeth Non-sterile 6in | \$ 2.8200 | EA | | | Medco Instruments Incorporated - 2 | <input type="text" value="0"/> |
| 922433 | 3195 | Gauze Cut Non-sterile 400 Pieces Per Pack 18 X 18 Inch | \$ 319.9900 | CA(10) <input type="button" value="-"/> | KENDALL HEALTHCARE | 3195 | Covidien - 1 <input type="button" value="+"/> | <input type="text" value="0"/> |
| 922433 | 3195 | Gauze Cut Non-sterile 400 Pieces Per Pack 18 X 18 Inch | \$ 31.9990 | PK(1) | KENDALL HEALTHCARE | 3195 | Covidien - 1 | <input type="text" value="0"/> |

Click the to open more options

Type the desired **Order Qty** and click

After you’ve selected all the items needed on the Item Search page, click on [Go to Shopping Cart](#) at the top or bottom of the page.

Finalizing Order ~ Items Sourced to Warehouse and Vendor

Shopping cart displayed shows Warehouse and Vendor items.


Notification Center - Adding Receiver(s)

It will be required to add one primary receiver, even if it isn't required to receive on the items.

The initiator/requester will "Add Selected" available receivers to the requisition when it is created. The primary receiver will need to be selected using the radio button. Anyone not marked primary will be a secondary receiver. You can add multiple secondary receivers from the list of available receivers. This person must be different than the Initiator/Requester of the Order.


If you need to make a change to the list of available receivers (add/remove) please send an email to: preqs@uiowa.edu. If adding new receivers, please provide the full name and HawkID of the receiver to add.


Notification Center - Adding Requested by

The person listed as "Requested by" is the person requesting the order for the goods/services. This person will be receiving email notifications for this order including the Voucher Created email. Enter a valid HawkID or use the Search  functionality to search by HawkID or name to populate the Requested by field.

If you need to make a change to the Requested by person after the order is workflow complete, please contact preqs@uiowa.edu. The team will need the Purchase Order number, full name and HawkID of the Requested by person that the order is changing to.


Notification Center

Receivers  [add](#)


| Primary | Name | Hawk ID | Phone | Email | Department | Location | Remove |
|----------------------------------|-----------------|---------|--------------|--|--------------------------------|----------|---|
| <input checked="" type="radio"/> | Housel, Karen L | khousel | 319/335-0409 | karen-housel@uiowa.edu | VPFO-Accounts Payable & Travel | 202 PCO |  |



Available Receivers

Adam, Michael J
Heath, Jason E
O'Brien, Benjamin T

 **Add Selected**

The person listed as "Requested by" is the person requesting the order for the goods/services. This person will be receiving email notifications for this order including the Voucher Created email. To populate the Requested by table below enter a valid HawkID.

Requested by  [add](#)

| Hawk ID | Name | Phone | Email | Department | Location | Remove |
|---|----------------------|--------------|--|-----------------|----------|---|
| <input type="text" value="leighthy"/>  | Christine L Leichthy | 319/335-0384 | chris-leichthy@uiowa.edu | VPFO-Purchasing | 202 PCO |  |

| | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | fund | org | dept | sdept | grnt/prgm | iact | oact | dact | fn | ctr | slid | slac |
|  | 050 | 05 | 0310 | 00000 | 50649100 | 6070 |  000 | 00000 | 31 | 0000 | | |

| # | UI Item # | Description | Qty | UOM | Total Price | | | | | | | | | |
|---|-----------------------|---|------|-------|-------------|---------------------|------|-------|----|------|------|------|----------|--|
| 1 | 21785 | Hepatitis B Vaccine 10 mcg/0.5 ml syringe/vial - Engerix-B | 3.0 | EA | \$ 43.23 | add | | | | | | | | |
| | fund | org | dept | sdept | qamt/pram | iact | oact | dact | fn | cctr | slid | slac | mfk amt | |
| | 170 | 70 | 7305 | 02020 | 000000000 | 6130 | 300 | 00000 | 31 | 0000 | | | \$43.23 | |
| 2 | 22622 | Hepatitis B Immune Globulin Inj 0.5 ml syringe - Hyperhep B | 5.0 | EA | \$ 413.05 | add | | | | | | | | |
| | fund | org | dept | sdept | qamt/pram | iact | oact | dact | fn | cctr | slid | slac | mfk amt | |
| | 170 | 70 | 7305 | 02020 | 000000000 | 6130 | 100 | 00000 | 31 | 0000 | | | \$413.05 | |

| # | UI Item # | Description | Qty | UOM | Total Price | |
|---|-----------------------|--|-----|-----|-------------|---------------------|
| 1 | 15811 | Syringe Refill Shade A1 Dentin Herculite XRV | 2.0 | EA | \$ 70.50 | add |
| <div><div> fund</div><div> org</div><div> dept</div><div> sdept</div><div> grnt/prgm</div><div> iact</div><div> oact</div><div> dact</div><div> fn</div><div> cctr</div><div> slid</div><div> slac</div><div> mflk</div><div> amt</div></div> | | | | | | |
| <div><div> add</div><div>050</div><div>05</div><div>0310</div><div>00000</div><div>50649100</div><div>6070</div><div> 000</div><div>00000</div><div>31</div><div>0000</div><div></div><div></div><div>\$70.50</div></div> | | | | | | |
| Line Comments Insp. Required ID Inspection Not Required Confirming Order No Due Date 01/01/2015 | | | | | | |
| 2 | 16289 | Intraoral Syringe Tips Large (PKG/100) | 3.0 | PKG | \$ 62.10 | add |
| <div><div> fund</div><div> org</div><div> dept</div><div> sdept</div><div> grnt/prgm</div><div> iact</div><div> oact</div><div> dact</div><div> fn</div><div> cctr</div><div> slid</div><div> slac</div><div> mflk</div><div> amt</div></div> | | | | | | |
| <div><div> add</div><div>050</div><div>05</div><div>0310</div><div>00000</div><div>50649100</div><div>6070</div><div> 000</div><div>00000</div><div>31</div><div>0000</div><div></div><div></div><div>\$62.10</div></div> | | | | | | |
| Line Comments Insp. Required ID Inspection Not Required Confirming Order No Due Date 01/01/2015 | | | | | | |
| <div><div><div>FAX Confirmation to: add</div><div>Est. Shipping: \$ 0.00</div></div><div><div>Supplier Subtotal:</div><div>\$132.60</div></div></div> | | | | | | |

13 | Page

Covidien [More Info](#)[W000226853](#) Workflow Required

It will also create Req IDs for the order for items sourced to Vendor, which may or may not require further action from you depending on your workflow threshold. The requester, initiator, purchasing agent, requested by and end user people will receive an email indicating the PO #.

| # | UI Item # | Description | Qty | UOM | Total Price | |
|--|------------------------|--|-----|------------------|-------------|------------|
| 1 | 922433 | Gauze Cut Non-sterile 400 Pieces Per Pack 18 X 18 Inch | 1.0 | CA | \$ 319.99 | |
| fund org dept sdept grnt/prgm iact oact dact fn cctr slid slac mfk amt | | | | | | |
| 990 17 3215 01000 54000600 6090 140 00000 00 0000 \$319.99 | | | | | | |
| Line Comments | | Insp. Required ID | | Confirming Order | | Due Date |
| | | Inspection Not Required | | No | | 07/28/2010 |

| | | | | | | |
|--|------------------------|--|-----|------------------|-----------|------------|
| 2 | 922433 | Gauze Cut Non-sterile 400 Pieces Per Pack 18 X 18 Inch | 5.0 | PK | \$ 160.00 | |
| fund org dept sdept grnt/prgm iact oact dact fn cctr slid slac mfk amt | | | | | | |
| 990 17 3215 01000 54000600 6090 140 00000 00 0000 \$160.00 | | | | | | |
| Line Comments | | Insp. Required ID | | Confirming Order | | Due Date |
| | | Inspection Not Required | | No | | 07/28/2010 |

FAX Confirmation to: Est. Shipping:

Supplier Subtotal: \$479.99

Surgical Advantage [More Info](#)[W000226852](#) Workflow Required

| # | UI Item # | Description | Qty | UOM | Total Price | |
|--|------------------------|--|-----|------------------|-------------|------------|
| 3 | 922406 | Forceps Tissue Allison 4-5 Teeth Non-sterile 6in | 5.0 | EA | \$ 14.10 | |
| fund org dept sdept grnt/prgm iact oact dact fn cctr slid slac mfk amt | | | | | | |
| 990 17 3215 01000 54000600 6090 210 00000 00 0000 \$14.10 | | | | | | |
| Line Comments | | Insp. Required ID | | Confirming Order | | Due Date |
| | | Inspection Not Required | | No | | 07/28/2010 |

FAX Confirmation to: Est. Shipping:

Supplier Subtotal: \$14.10

Order Total: \$ 519.13

Shopping Cart ~ Catalog Order (Shopping Cart Favorites)

Click on the **Create Req** link in the side bar area and you'll get the Order By screen below.

PReqs
Create Req
Req Search Center


For orders you've previously saved as a favorite, you'll begin the same way on the Order By page. Verify the **Requester**, **Ship to**, and **End User** Information. Click the link **Shopping Cart Favorites**.


Order By

Select one of the following to order by:

- ☐ **Purchase Requisition**- This requisition will be used to order by contract or by description for services, equipment, repairs and blanket orders that go to an outside vendor.
- ☐ **eBuy Shopping**- This selection will direct you to prime vendor contracts.
- ☐ **PeopleSoft Catalog Orders**- This selection will be used to order PeopleSoft item number products that are sourced from Hospital Procurement Stores, General Stores, Dentistry Stores, and College of Pharmacy Stores or from a vendor. [Shopping Cart Favorites](#) [Recurring Orders](#)

Requester Information

Requester: Ship To: 
HawkID: CLEICHTY Description: Leichty,Chris PCO-202
Location: PCO-202-04 Address: The University of Iowa
Phone: 319/335-0384 Purchasing AP & Travel
Department: Purchasing PCO-202
Email: chris-leichty@uiowa.edu 125 S Dubuque St
Iowa City, IA 52242-2500
Phone: 319/335-0384
Fax:

End User HawkID: ? 
Name: Michael J Adam
Location: 211 PCO
Phone: 319/335-1861
Department: VPFO-Purchasing
Email: michael-adam@uiowa.edu

A list of your **Saved Shopping Lists** will display.

You may select the cart name or remove from your list.

Saved Shopping Lists

| Order ID | Cart Name | |
|------------|--|------------------------|
| SC00212333 | Lab Coats Weekly | remove |
| SC00212377 | AGA Medical order | remove |
| SC00212665 | Scrub Order/Linen Stores | remove |

Saved Shopping List Items

| | UI Item # | Description | UOM Price | UOM | Sourcing from | Order Qty |
|---|-----------------------|---------------------------|------------|-----|------------------------------|-----------|
| X | 42648 | Pants Charcoal Dietary 34 | \$ 14.4000 | EA | Standard Textile Company - 1 | 6.0 |
| X | 42649 | Pants Charcoal Dietary 36 | \$ 14.4000 | EA | Standard Textile Company - 1 | 6.0 |
| X | 42650 | Pants Charcoal Dietary 38 | \$ 13.7300 | EA | Standard Textile Company - 1 | 6.0 |

Clear Order Qty

Add to Shopping Cart

Add Items

Return to Saved Carts

Your items and quantities are saved in the Favorites.

You may change the quantities, delete and/or **Add to Shopping Cart**.

You may even add items to an existing cart Favorite by clicking **Add Items**.

Items Sourcing From a Warehouse:

Comments for the Warehouse 

UIHC PROCESSED STORES

| # | UI Item # | Description | Qty | UOM | Total Price | |
|---|---|--|-----|-----|-------------|---|
| 1 | 923661 | Syringe Insulin U-100 Disp 31ga X 5/16in Needle 0.5ml nonsa | 4.0 | EA | \$ 0.72 |  |
| | add | | | | | |
| | fund org dept sdept grnt/prgm iact oact dact fn cctr slidslac | mfr amt | | | | |
| | 990 17 3215 01000 54000600 6090 | 270 00000 00 0000 | | | | |
| | | \$0.72 | | | | |
| 2 | 907171 | Swab Povidone Iodine Stick 3-pack | 2.0 | PK | \$ 0.23 |  |
| | add | | | | | |
| | fund org dept sdept grnt/prgm iact oact dact fn cctr slidslac | mfr amt | | | | |
| | 990 17 3215 01000 54000600 6090 | 110 00000 00 0000 | | | | |
| | | \$0.23 | | | | |
| 3 | 939408 | Suture Chromic Gut Absorbable 5-0 27in Reverse Cutting Needl | 1.0 | BX | \$ 123.60 |  |
| | add | | | | | |
| | fund org dept sdept grnt/prgm iact oact dact fn cctr slidslac | mfr amt | | | | |
| | 990 17 3215 01000 54000600 6090 | 400 00000 00 0000 | | | | |
| | | \$123.60 | | | | |

Warehouse Subtotal: \$124.55

Price: This is the approximate price a user area will be charged upon issue of this item from an inventory area.

Stock Subtotal: \$ 124.55

Order to Vendor ~ Workflow Required

Click the PReq link to access requisition.

Covidien [More Info](#)

W000226853 Workflow Required

| # | UI Item # | Description | Qty | UOM | Total Price | |
|---|---|---|--|------------|-------------|--|
| 1 | 922433 | Gauze Cut Non-sterile 400 Pieces Per Pack 18 X 18 Inch | 1.0 | CA | \$ 319.99 | |
| | fund org dept sdept grnt/prgm iact oact dact fn cctr slidslac | mfr amt | | | | |
| | 990 17 3215 01000 54000600 6090 140 00000 00 0000 | \$319.99 | | | | |
| Line Comments | | Insp. Required ID | Confirming Order | Due Date | | |
|  | | Inspection Not Required  | No  | 07/28/2010 | | |
| 2 | 922433 | Gauze Cut Non-sterile 400 Pieces Per Pack 18 X 18 Inch | 5.0 | PK | \$ 160.00 | |
| | fund org dept sdept grnt/prgm iact oact dact fn cctr slidslac | mfr amt | | | | |
| | 990 17 3215 01000 54000600 6090 140 00000 00 0000 | \$160.00 | | | | |
| Line Comments | | Insp. Required ID | Confirming Order | Due Date | | |
|  | | Inspection Not Required  | No  | 07/28/2010 | | |




FAX Confirmation to:

Est. Shipping: 0.00

Supplier Subtotal: \$479.99

Surgical Advantage [More Info](#)

W000226852 Workflow Required

| # | UI Item # | Description | Qty | UOM | Total Price | |
|---|---|---|--|------------|-------------|--|
| 3 | 922406 | Forceps Tissue Allison 4-5 Teeth Non-sterile 6in | 5.0 | EA | \$ 14.10 | |
| | fund org dept sdept grnt/prgm iact oact dact fn cctr slidslac | mfr amt | | | | |
| | 990 17 3215 01000 54000600 6090 210 00000 00 0000 | \$14.10 | | | | |
| Line Comments | | Insp. Required ID | Confirming Order | Due Date | | |
|  | | Inspection Not Required  | No  | 07/28/2010 | | |

FAX Confirmation to:

Est. Shipping: 0.00


Supplier Subtotal: \$14.10

Order Total: \$ 519.13

This requisition is from order # SC00329858

Review Requester Information

Requester
[Leichty, Chris](#)

Ship To 
[PCO-202-04](#)

End User 
[Julie A Bergeon](#)

You'll need to review the information on the requisition to send to workflow.

This link will take you back to your shopping cart

Vendor Information

Vendor and line information defaults from UI Item number. You are unable to change this information.

Vendor ID: Addr #: LOC: Address: 1717 W Collins Ave
Vendor Name: Kerr Corporation City: Orange State: CA Zip: 92867
Fax: 800/537-7345 Phone: Country: USA
Email:

Order Details

This will be your final opportunity to change your quantity, MFK, comments, due date, inspection, and confirming order.

Business Justification for This Purchase

Fulfill stock

Apply this MFK to all lines.

fund

org

dept

sdept

grmt/prgm

iact

oact

dact

fn

ctr

slid

slac

add

050

05

0310

00000

50649100

6070

000

00000

31

0000

Buyer: Crew,Colleen

Buyer Info

| # | Act | UI Item # | Qty | UOM | Category | Price | Extension | | | | | | |
|--|------|-----------|------|-------|------------|--------------|----------------|------|-------|-----|------|------|--------------|
| 1 | X | 15811 | 3.0 | EA | 53131500 ? | \$ 35.25000 | \$ 105.75000 | | | | | | |
| <div>Syringe Refill Shade A1 Dentin Herculite XRV</div> <div> <div>Vendor Item ID: 29813</div> <div>Mfg ID:</div> <div>Mfg Item ID:</div> <div>Contract ID:</div> </div> | | | | | | | | | | | | | |
| | fund | org | dept | sdept | grmt/prgm | iact | oact | dact | fn | ctr | slid | slac | mfk amt |
| | add | 050 | 05 | 0310 | 00000 | 50649100 | 6026 | 000 | 00000 | 60 | 0000 | | \$105.75000 |
| <div>Line Comments</div> <div> <div>Inspection Required ID</div> <div>Inspection Not Required</div> </div> <div>Due Date 01/01/2015</div> | | | | | | | | | | | | | |
| 2 | X | 16289 | 5.0 | PKG | 53131500 ? | \$ 20.70000 | \$ 103.50000 | | | | | | |
| <div>Intraoral Syringe Tips Large (PKG/100)</div> <div> <div>Vendor Item ID: 20731</div> <div>Mfg ID:</div> <div>Mfg Item ID:</div> <div>Contract ID:</div> </div> | | | | | | | | | | | | | |
| | fund | org | dept | sdept | grmt/prgm | iact | oact | dact | fn | ctr | slid | slac | mfk amt |
| | add | 050 | 05 | 0310 | 00000 | 50649100 | 6026 | 000 | 00000 | 60 | 0000 | | \$103.50000 |
| <div>Line Comments</div> <div> <div>Inspection Required ID</div> <div>Inspection Not Required</div> </div> <div>Due Date 01/01/2015</div> | | | | | | | | | | | | | |
| 3 | X | 16329 | 2.0 | JR | 53131500 ? | \$ 661.05000 | \$ 1,322.10000 | | | | | | |
| <div>Tyten FC Double Spill 600mg Fast Set Gray Cap Yellow Body (JR/500)</div> <div> <div>Vendor Item ID: 29994</div> <div>Mfg ID:</div> <div>Mfg Item ID:</div> <div>Contract ID:</div> </div> | | | | | | | | | | | | | |
| | fund | org | dept | sdept | grmt/prgm | iact | oact | dact | fn | ctr | slid | slac | mfk amt |
| | add | 050 | 05 | 0310 | 00000 | 50649100 | 6026 | 000 | 00000 | 60 | 0000 | | \$1322.10000 |
| <div>Line Comments</div> <div> <div>Inspection Required ID</div> <div>Inspection Not Required</div> </div> <div>Due Date 01/01/2015</div> | | | | | | | | | | | | | |

Running Total: \$ 1,531.35

Attachments

If you need to include an **Attachment**, start by clicking the **Browse...** button, locate file and click the **Upload Attachment** button. Once uploaded, select the Attachment Type from the drop down menu and select if it should be Sent to the Vendor or not. Click the Red X if the Attachment needs to be removed

Attachments

| Act | File Name | File Type | Attach Date | Attachment Type | Send to Vendor |
|-----|--|---|--------------------|-----------------|---|
| | MonthlyCreditLimit.pdf | application/pdf | 05/20/2010 10:27AM | Quote | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| | UIVAF.doc | application/msword | 05/20/2010 10:28AM | Sole Source | No |
| | National_Belgium.xlsx | application/vnd.openxmlformats-officedocument.spreadsheetml.sheet | 05/20/2010 10:30AM | Invoice | No |

Review, Add, or Edit **Comments**. Comments can be added to your Favorites to use for future orders. If comments were added on the Shopping Cart page, they will be transferred to the Requisition. Text entered in the Vendor Comments will print on the Purchase Order sent to the Vendor, while text entered in the Internal Comments will remain as a note for the Department and/or Purchasing department and text entered in the Receipt will print on the PO Receipt for Receivers to view.

Comments

| | |
|----------|---|
| Vendor | <div>Per quote number 88KKKE.</div> <div></div> |
| Internal | <div>Special Project #44598</div> <div></div> |
| Receipt | <div>Check for breakage.</div> <div></div> |

If the order has already been placed to the vendor, click **Yes**.

☐ Yes ☒ No Has the order already been placed with the vendor for the goods or services? If "Yes" is selected, Purchasing will not send this order to the vendor.

☐ Check if this is a Prepayment. This is a Prepayment, payment will be sent separately from Purchase Order.

☐ View Sole Source Form

To Complete the Requisition, you can either **Save**, **Validate** or **Void**.

Save - Saves a requisition and allows you to work on it later

Validate - Validates all fields on the Requisition including the MFK.

Void - Voids the Requisition.

When the form is complete, click the **Send to Workflow** button. This will integrate with the Workflow system (Contact your Workflow Administrator if you have questions or concerns). Once Workflow is complete, the Requester, Initiator and Purchasing Agent will receive an email stating the assigned Purchase Order number, which then uploads to PeopleSoft and the PO is dispatched to vendor.

Finalizing Workflow

Workflow is the process of creating and approving various types of forms electronically. Based on predetermined Workflow Paths (as set by Org and Dept workflow administrators), these forms can be approved electronically and sent on to the next person in the approval path.

Choose Workflow Routing

Initiate Workflow Process

Workflow Routing

Confirm Workflow Routing

PReq Sidebar

The side on the PReq contains information about the Req and some links.

Req ID: Is located on the sidebar at the top. A 10-digit number that begins with a W. The PReqs system electronically assigns the number after the Initiator saves or validates a requisition.

WFTx#: Is located on the sidebar at the top. This is the Workflow transaction number that is assigned by workflow for tracking purposes.

Date: Is located on the sidebar at the top. This is the date the requisition was created.

PO: Is located on the sidebar at the top. A 10 digit number that begins with a 1 or B. This number is electronically assigned in the PReqs System after the last workflow approval.

PReqs

Create Req: Requisitions going to outside vendors only.

Req Search Center: Located on the sidebar, click on Search Center to find Requisitions. Granted by workflow administrator.

Order (catalog) Search Center: Located on the sidebar, click on Search Center to find Catalog Orders. Granted by workflow administrator.

Return to Order: Takes the user to the main Order entry page.

Copy Req: Brings up an established Req you would like copied. Click Copy Req on the side bar. The information from the Req will be populated in a new record. Make any changes needed and send to workflow.

Copy Order: Brings up established Catalog order you would like copied. Click Copy Order on the side bar. The information from the Order will be populated in a new record. Make any changes needed and send to workflow.

Find UI Contract: Search for established University Contracts by Vendor, Category, or Products/Services.

Favorites - Frequently used information.

Forms

PReq Access: Requesters link to add initiators

PReq Access Search: Requesters link to search for initiator request status

Ship to Codes: Request to add, change, or delete a Ship to code

Indiv Contractor Doc: Payroll form link to pay contractors

▼ Purchasing Links

- Purchasing Contracts
- Current Bid Opportunities
- Iowa Prison Industries
- Targeted Small Business
- Subagreements
- eforms

▼ Help Center

- Contact Us
- Purchasing Policy Manual
- Purchase Req Tutorial
- Catalog Order Tutorial
- Services Voucher Tutorial
- Non-Services Voucher
- Tutorial
- Freight Account
- FAQ
- Requester Search

Purchasing Links

Purchasing Contracts: University of Iowa contracts are considered a primary tool for the departments to receive the best pricing and quality. Contact Purchasing Agents if you have questions.

Bids Opportunities: Currently Active Bids

Iowa Prison Industries: Web site showing Iowa Prison Industries Items.

Targeted Small Business: System providing State of Iowa certified Targeted Small Businesses with advance notice of procurement opportunities.

Subagreements: Division of Sponsored Programs web site to help users with subagreements.

e-forms: Electronic forms web site.

Help Center

Contact us: Informational page for questions

Purchasing Policy Manual: Link to manual with guidelines

PReqs Initiator Tutorial: Document for requesters and initiators

Catalog Order Tutorial: Document for requesters and initiators for use of catalog orders

Services Voucher Tutorial: Document for help with services e-vouchers (payroll)

Non-Services Voucher: Document for help with non-services e-vouchers

Freight Account: Learn how getting a Freight account can save you money.

FAQ: Frequently asked questions regarding PReqs and e-Vouchers

Requester Search: This search will look in the Requester Code, Requestor Name, Location, and Department Name fields

Search Center

Order Search Center

Note:
Search entries are case in-sensitive. Using 'Equal To' with 'foo,bar' will find 'Foo,Bar', 'FOO,BAR', etc.
You may use wildcards '*' on search entries. For Order ID, using 'Like' with '*10' will find IDs ending in 10 such as 'SC000010', or 'S0056110'. Using 'Like' with '*10*' will find IDs having 10 in them such as 'SC000103', or 'SC561108'.

Search

SC Order ID

Equal To

Stock ID

Equal To

eBuy Shopping Cart ID

Equal To

eBuy Shopping Cart Name

Equal To

eBuy Catalog Num

Equal To

Recurrence ID

Like

Order Date

Equal To

SC Order Status

Equal To

Requested By (HawkID)

Equal To

Initiator (HawkID)

Equal To

Requester Code

Equal To

Requester Name

Equal To

Ship To

Equal To

End User

Equal To

Contract ID

Equal To

Vendor ID

Like

The Search Center is granted by your workflow administrator.

You can search for Catalog orders using many different criteria on this page.

You can narrow the search by putting information in multiple fields.

SC Order ID is the number assigned to the Catalog Order.

Stock ID is the number assigned to Items sourced from a warehouse.

Search Center Results

15 Orders found.

| Order # | Order Date | Initiator | End User | Status | Order Amt | Description |
|----------------------------|------------|-----------|---------------|----------|-------------|--------------------------------|
| SC00000318 | 2007-07-12 | jbergeon | Julie Bergeon | Complete | \$ 240.00 | Syringe Refill |
| SC00000382 | 2007-07-23 | jbergeon | Julie Bergeon | Complete | \$ 240.00 | Syringe Refill |
| SC00000508 | 2007-08-22 | jbergeon | Julie Bergeon | Complete | \$ 9,003.56 | CUSHION CHAIR AIR FILLED |
| SC00000541 | 2007-08-23 | jbergeon | Julie Bergeon | Complete | \$ 5,600.70 | MIRROR CONE SOCKET PLAIN #4 |
| SC00000559 | 2007-08-23 | jbergeon | Julie Bergeon | Complete | \$ 5,421.61 | TUBE RECTAL X-RAY OPAQUE NON-S |

After you have the information in the fields you want to search on, click on **Search** at the top left of the Search Center page. A list of the requisitions that met the criteria you entered will be displayed.

Click on the **Order #** if you want to see the catalog order.

Requisition Search Center

Note:
Search entries are case in-sensitive. Using 'Equal To' with 'foo,bar' will find 'Foo,Bar', 'FOO,BAR', etc.
You may use wildcards '*' on search entries. For Requisition ID, using 'Like' with '*10' will find IDs ending in 10 such as 'W000000010', or 'W000056110'. Using 'Like' with '*10*' will find IDs having 10 in them such as 'W000000105', or 'W000561108'.

Requisition ID

PO ID

eBuy Shopping Cart ID

eBuy Shopping Cart Name

eBuy Catalog Num

Requisition Date

Requisition Status

Requested By (HawkID)

Initiator (HawkID)

Requester Code

Requester Name

Ship To

End User

Contract ID

You can search for requisitions using many different criteria on this page.

You can narrow the search by putting information in multiple fields.

There are four main fields that users need to know how to search on.

Requester Name: If you use the criteria “Equal to”, you must enter the name using the following format: lastname,firstname no spaces. For example, Doe,Jane. If you use the criteria “Like” you can use the any part of the Requesters name, for instance just their last name. You then need to enter the wildcard * before and/or after the name. This type of search is helpful if you are not sure of exactly how the Requester’s name has been entered or how it is spelled.

Vendor Name: This works like the Requester Name search. If you use “Equal to” you must enter the complete vendor name and exact spelling. If you use the “Like” criteria, enter the wildcard of * before and/or at the end. For example, *Dell; Dell*; *Dell*, etc.

Initiator (HawkID): You must enter the Initiators official HawkID to use this search. To look up a HawkID, use the campus phone directory on the sidebar.

Requested By (HawkID): You may enter the HawkID for the Requested By person to use this search. To look up a HawkID, use the campus phone directory on the sidebar.

After you have the information in the fields you want to search on, click on “Search” at the top left of the Search Center page. A list of the requisitions that met the criteria you entered will be displayed.

| Search Center Results | | | | | | | | | | | | | | |
|----------------------------|-------------------|-----------|---------------|-------------------|----------------------------|------------|---------------|------------|-------------------------------------|-----------|--------------------------------|---------|-----------------------------|---------------|
| 500 Requisitions found. | | | | | | | | | | | | | | |
| Req # | Requested By | Initiator | End User | Status | PO ID | PO Date | PO Type | PO Status | Vendor Name | Req Amt | Description | Attach | Order ID | Paid by PCard |
| W001103205 | Decker, Elizabeth | edeckr | Mary Cohen | Workflow Complete | 1001976960 | 2018-08-02 | Regular Order | Dispatched | West Music Company Incorporated | \$ 56.90 | Oakdale Comm. Choir supplies | Invoice | | No |
| W001103171 | Decker, Elizabeth | edeckr | Brian Douglas | Workflow Complete | 1001976939 | 2018-08-02 | Regular Order | Dispatched | Gazette Communications Incorporated | \$ 67.69 | Shipping June 2018 | Invoice | | No |
| W001102984 | Decker, Elizabeth | edeckr | Anne E Wilson | Workflow Complete | 1001976502 | 2018-07-02 | eBuy order | Complete | Office Depot Inc | \$ 588.93 | HP 508A Cyan Toner Cartridge (| | EB105254087 | No |

Click on the **Req #** if you want to see the requisition or click on the **PO number** to see the PO report.

Users can search on and view all requisitions in the Preqs system, but can only edit the requisitions they initiated.

Catalog Order Guidelines

Catalog Order: Requesters must be assigned specific catalogs in order to be able to access the catalog and order the item. This order may contain multiple Warehouse and/or multiple Vendor items. These get assigned a 10-digit number beginning SC.

PReqs Access Form: This is required for all requesters to gain access to and complete orders.

Stock requests: (items sourced from a warehouse): these orders do not go through workflow. These get assigned a 10-digit number beginning in "0" also referred to as a "Stock ID". These will be loaded into the PeopleSoft Financial System where they will be "picked" from the Warehouse.

Items sourced from a vendor: these orders may or may not require workflow depending on the workflow threshold limit approved by the department. These orders are assigned a 10-digit requisition ID beginning with "W". These are loaded into the PeopleSoft Financial System and dispatched to the vendor by Purchasing.

Workflow: Paperless, electronic signature system.

Workflow Threshold: A workflow threshold is determined by the department for their catalog items on contracts. This threshold will be allowed by their department to place an order where contracted pricing has been established with the vendor. When creating a catalog order the requisition will be routed to workflow only if the requisition is over the requester's workflow threshold limit for items sourced to a vendor (non-stock) orders.

Requesters: These are the people in the department who work directly with Purchasing and Accounts Payable to facilitate the procurement and payment process. Requesters may be contacted by Purchasing, Accounts Payable, or the vendor if a question arises regarding the Catalog Order. Users must either be a Requester or an initiator assigned to a specific requester(s) in order to be able to initiate transactions in PReqs. If a user signs in and is not a Requester or assigned to a requester(s), they will not be able initiate a requisition.

Initiators: An initiator is an individual assigned to a specific Requester(s) in order to be able to initiate transactions.