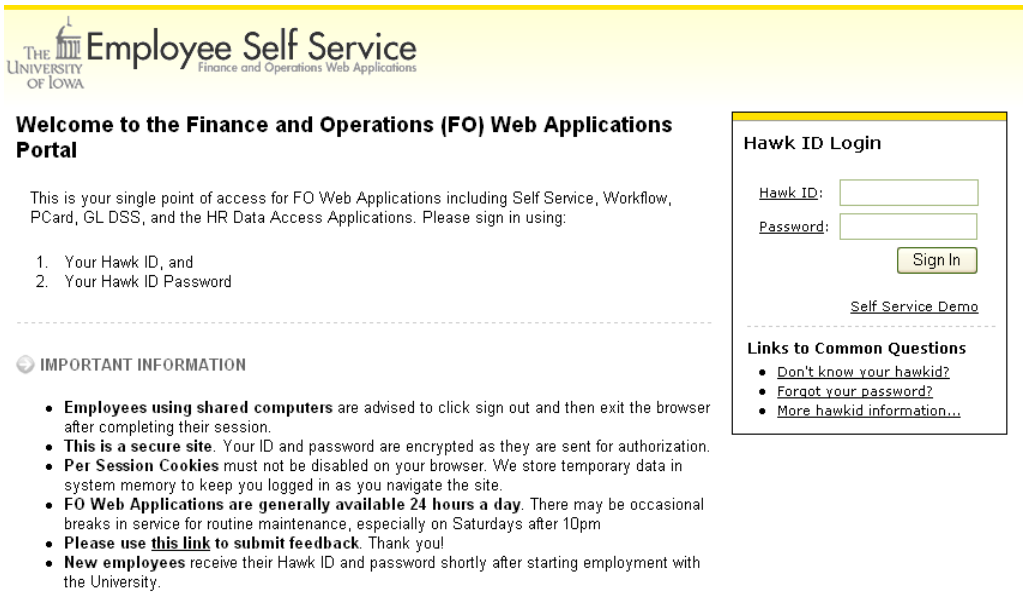
Purchase Requisitions (PReqs) Guide

This guide is for the process of ordering Services, Equipment, Repairs, and Blanket Orders by description only, which go to an outside vendor.

Contents

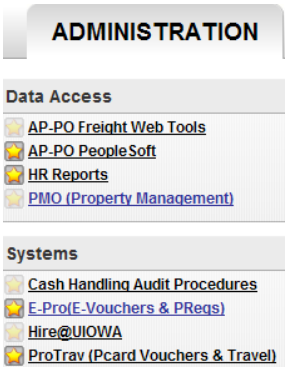
Accessing System

To access the system, Purchase Requisitions (PReqs), go to https://hris.uiowa.edu/portal/. The screen shot below is the initial sign-on screen to all FUS Web Applications and Self Service.



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 PReqs.

On the menu screen, under **Administration** tab, click on the link to **e-Pro (e-Voucher and PReqs)** or add to your favorites using the  .



If you need assistance with PReqs, please send an email to: PReqs@uiowa.edu. If you need assistance with Workflow, please send an email to: workflow@uiowa.edu.

The PReqs System can be used for purchase requisitions to inside or outside vendors. This tutorial will cover PReq to outside vendors only. After you complete your requisition, you will send the form to Workflow, following a predetermined path established by your Org/Department/Unit. You will be able to determine at any time where your form is in the Workflow process.

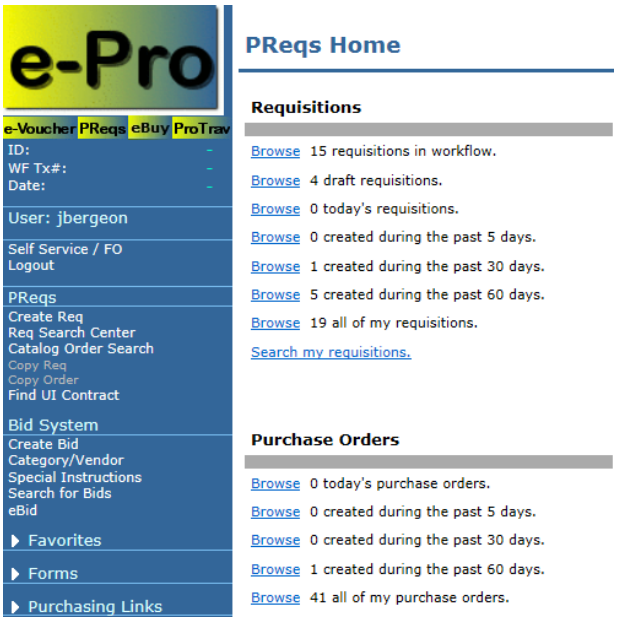
A user is defined as any employee who signs into PReqs application. A requester can be the same as a user or different than the user. Users must be assigned a requester or multiple requesters in order to be able to create purchase requisitions. If a user is not a requester or not assigned to a requester they cannot initiate a PReq.

One-Stop e-Procurement ~ Homepage

The name of this Web Application is **PReqs** (***Purchase Requisitions***).

Please note the **System Messages**

Click on **PReqs**.



PReqs Home Page

You should now be at PReqs Home Page. You can view Requisitions and Purchase 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 they created. You will not be able to see requisitions created by other Initiators on this page. This page shows only your own work. This is where Initiators will keep track of their requisitions and see when the requisition has been assigned a Purchase Order (PO) number.

Search my requisitions allows you to search by date range, PReq or PO numbers, and many other options.

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.

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

Requisition Center

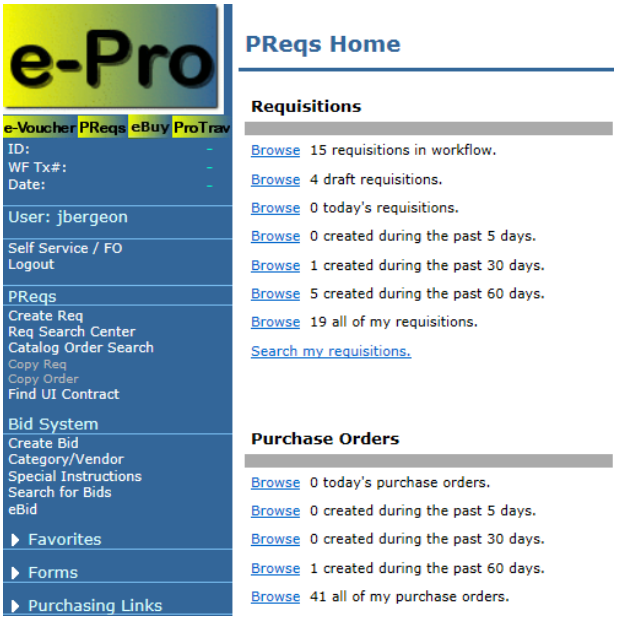
Req #	Req Date	End User	Status	Vendor Name	Req Amt	Description	Attach	Order ID	Paid by PCard	On Contract
W000542467	2012-05-08	Julie Bergeon	Sent to Workflow	Blue Eagle Design	$ 2,500.00	test confirming non/contract			No	No
W000542468	2012-05-08	Julie Bergeon	Sent to Workflow	Apple Incorporated	$ 7,500.00	test confirming on-contract			No	No
W000542533	2012-05-16	Julie Bergeon	Sent to Workflow	Advanced Electrical Services Incorporated	$ 5,000.00	test			No	No
W000542534	2012-05-16	Julie Bergeon	Inside Workflow	Scheels All Sports	$ 7,500.00	Black and Gold Socks for Purch	Invoice		No	No
W000542607	2012-06-21	Julie Bergeon	Draft Req	Dell Computer Corporation	$ 400.00	test			No	No
W000542655	2012-09-18	Jamie Hachmeister	Sent to Workflow	OfficeMax	$ 11.29	OfficeMax - Retractable Gel In		EB846516	No	No
W000542656	2012-09-18	Jamie Hachmeister	Sent to Workflow	Fisher Scientific Company	$ 45,378.48	BEKR PP PRINTD GRAD 25ML 10/PK		EB846516	No	No

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 **PReqs Home Page**.



Under **Purchase Orders** on the PReqs 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
W000118042	Julie Bergeon	1000607751	2007-11-26	RFQ Order	Open	Pigott Incorporated Office Pavilion	$ 31,451.29	#0092001 - Continuing Educatio	
W000118099	Julie Bergeon	1000607718	2007-11-26	Regular Order	Dispatched	Schaerer Mayfield USA Incorporated	$ 820.00	#13115 POLYESTER CHICK FOAM	
W000118101	Julie Bergeon	1000607720	2007-11-26	Regular Order	Dispatched	Terumo Medical Corporation	$ 580.00	Microcatheter Progreat Coaxial	
W000118109	Julie Bergeon	1000607726	2007-11-26	Regular Order	Dispatched	Gummed Papers Of America	$ 4,164.80	12.5" x 18.5"-80# Ultra Digita	
W000118114	Julie Bergeon	1000607723	2007-11-26	Contract-State	Dispatched	Hewlett Packard Company	$ 6,983.00	PS955AV - HP XW8400 Workstatio	

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. Funds are encumbered unless the PO is a blanket order.

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.

Users 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/Oracle 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.

Under **Favorites** on the side bar, click on the **ShipTo** 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.

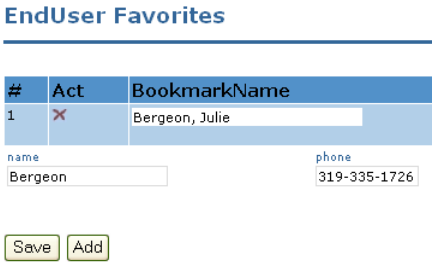
Fill in the ShipTo fields and click Save

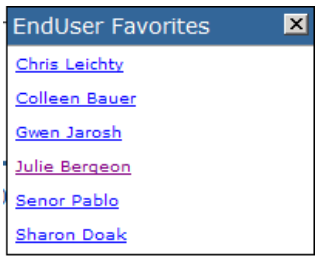
Click Add to add another.

Always remember to save after adding any new entries.

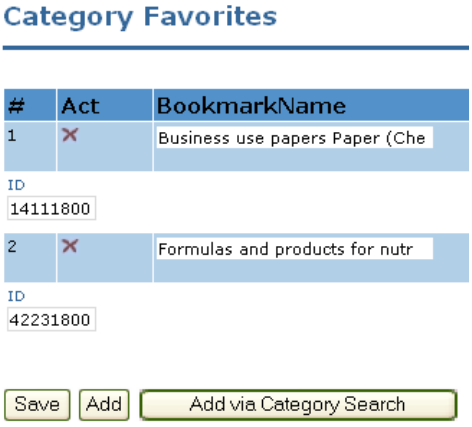
Note the Ship To ID format is Building-Room Number.

When you click **End User** under **Favorites** you may enter your **Bookmark Name** and tab to the Name field, enter the name and tab to the Phone field and enter the phone number, including area code and click Save





Wherever you see the in the PReq form, a window displays a list of your favorites.

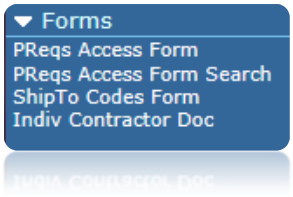


Here are examples of the other Favorites screen. Create your own Favorites for all the fields listed.

Create New Requisition

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

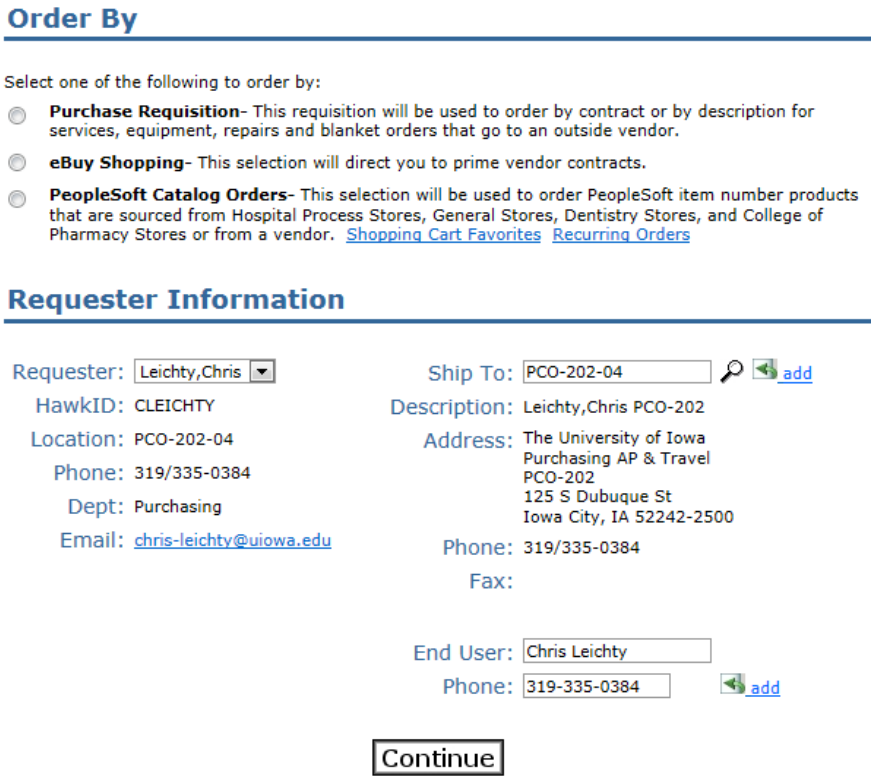


Order By Page

Select **Purchase Requisition**.

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

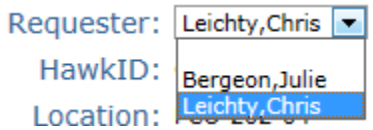
Some information will default.

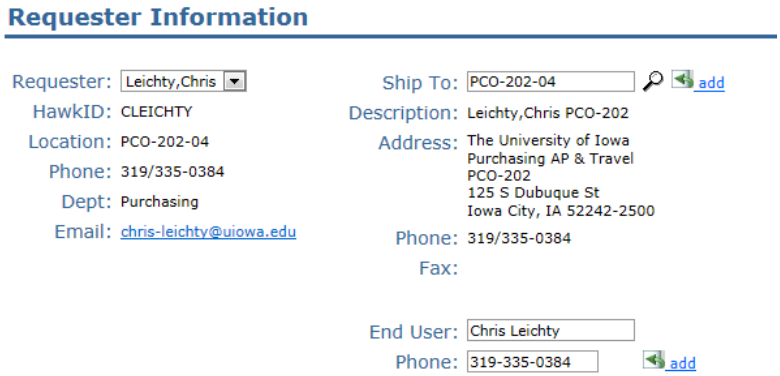


The Requester(s) you have been approved to use will be listed in the drop-down menu next to Requester:

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.



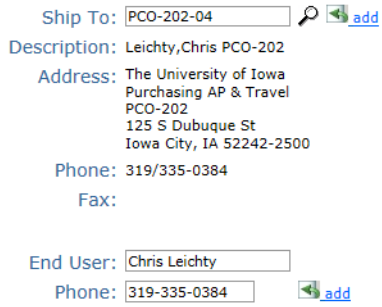


Requester: This information is used to identify the person in the department who works directly with Purchasing and Accounts Payable to facilitate the procurement and payment process. Requesters may be contacted by Purchasing, Accounts Payable, or the vendor if a question arises regarding the Order.

If you are a Requester and need to add, change, or update a requester, or add an initiator, Click on PReqs Access link under Forms on the sidebar and fill out the form.

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. Generic Ship To Codes can also be used. See the Purchasing Requester's Guide for further information on these generic codes.

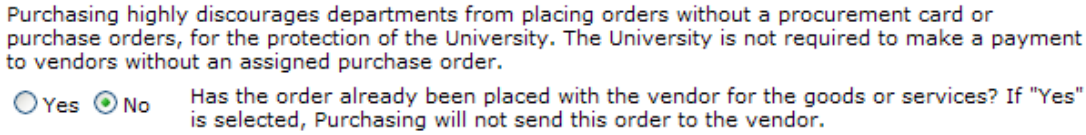
If you need to add, change, or delete a Ship To Code, Click on Ship To Codes Form link under Forms on the sidebar. State if you need to add, change or delete a Ship To Code. If deleting or changing, provide the Ship To Code #. If requesting that a new code be added, provide the building name and room number as well as the name, phone number, and department name associated with the campus address.



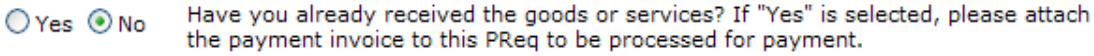
End User: The End User is the member of your department requesting the good or services. Make sure to enter the phone number in the format shown, including area code.

Remember: These can be added to your Favorites by clicking the **add** link.

If your order has been placed with the vendor, the PO is a *Confirming Order* and will not be sent to the vendor.

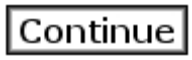


When **Yes** is selected, you'll be asked if you have received an invoice. You will attach the invoice on the next page to process the payment.



MFK is established by the Requester for the Initiator. This will default in on the Purchase Requisition and can be changed by the user and individuals on the workflow path.

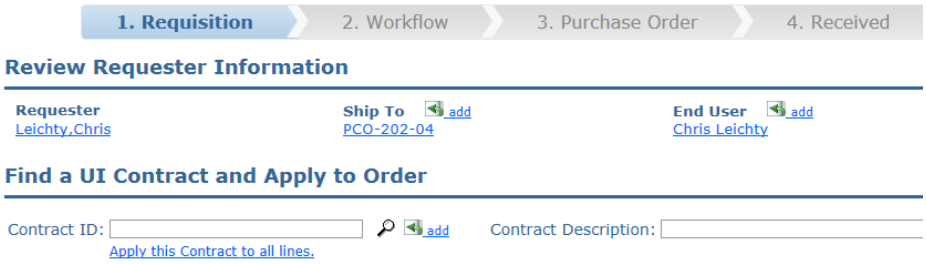
Catalog access does not apply when creating a Purchase Requistion.

Click the 

button

Requisition Page

Requester, Ship to, and End User information will collapse. You may click the links to change any info.



UI Contracts

Purchasing has negotiated many contracts with vendors to get the best pricing.

Click the spyglass to search all contracts.

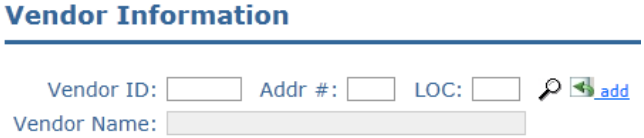
Add your criteria and click search, or just narrow your search by category or attribute.

Click the link for the contract you wish.

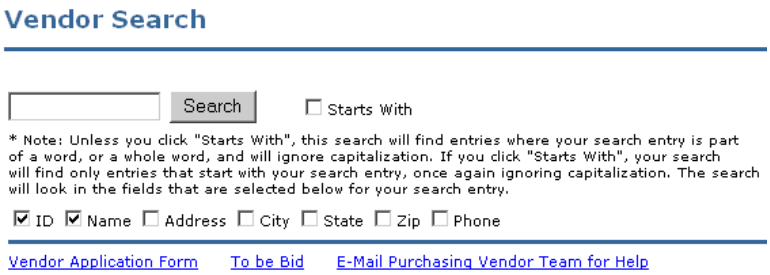
If you don't find any contracts, just click **Return to PReq**

Vendor Information

Adding a **Vendor** is the next step. If you know the Vendor ID and Address number you can type them directly into the fields. You can also use a Vendor Favorite, or you can search for a vendor.



If the vendor information does not populate or you don't know the vendor number, you may click on next to the vendor field to search for a vendor.



Type in the name you want to search for and click **Search**.

Vendor Search

dell | Search | Starts With

* Note: Unless you click "Starts With", this search will find entries where your search entry is part of a word, or a whole word, and will ignore capitalization. If you click "Starts With", your search will find only entries that start with your search entry, once again ignoring capitalization. The search will look in the fields that are selected below for your search entry.

☑ ID ☑ Name ☐ Address ☐ City ☐ State ☐ Zip ☐ Phone ☐ Vendor TIN

Vendor Application Form To be Bid E-Mail Purchasing Vendor Team for Help

Vendor ID	Addr #	Addr Type	Name	Address
103887	1	Order/Remit	Boydell And Brewer	668 Mount Hope Avenue
255201	1	Remit	Carson Dellaso Publishing Co Inc	PO Box 35665
204292	1	Order/RFQ/Remit	Davis Lobdell Instruments Incorporated	1100 N Dale St
107187	1	Order/Rfq	Dell Computer Corporation	Dell Marketing LP One Dell Way Bl
107187	2	Remit	Dell Computer Corporation	Dell Marketing LP Dell USA LP PO E
107187	3	Remit	Dell Computer Corporation	Dell USA LP PO Box 802816
107187	4	Order/RFQ	Dell Computer Corporation	One Dell Way
107187	5	Remit	Dell Computer Corporation	One Dell Way RR 2W Box 15
107187	6	Remit	Dell Computer Corporation	Dell Catalog Sales LP Dell USA LP

Then select the vendor you want to use by clicking that Vendor ID link.

Don't forget to scroll over on the search page to see the phone numbers, credit card acceptance, URL addresses. The Vendor information will populate the main requisition screen.

After you have entered the Vendor ID and Address # or chosen a Vendor from the Search, the address detail will be populated in your Requisition.

If you happen to select a vendor with a contract, you'll receive this message:

Yes No **This is a contracted Vendor, would you like to Review Current Contracts?**

If you would like to purchase from one of these contracts, click the Contract ID link for the contract you wish to purchase from. Click 'No' if these contracts do not apply.

Current Contracts for: Apple Incorporated

Vendor Number: 102243
Vendor Phone:
Address: Education Sales Support
MS 198-40SW
12545 Riata Vista Circle
Austin, TX 78727

Sales Representative: Ed Cranston 339-1104

Purchasing Agent: Jayne M Keiser +1 319 335 0387 jayne-keiser@uiowa.edu
Contract ID: 00000003000000000000005228
Contract Descr: Apple education agreement
Contract Active: 05/12/2008 - 12/31/2099

Category ID: 52161600 **Category Descr:** Audio visual equipment
Category ID: 43210000 **Category Descr:** Computer Equipment and

Click the Contract ID to apply or No, if the Contract Description doesn't apply to your order.

If you have questions, contact the Purchasing Agent.

Vendor Information

Vendor ID: 102243 Addr #: 3 LOC: 2 add Address 1: Education
Vendor Name: Apple Incorporated Address 2: MS 198-40

The Contract ID and Vendor Information will populate.

Contract ID: 00000003000000000000005228 add Contract Description: Apple education agreement
Apply this Contract to all lines.

Vendor Information

Vendor ID: 102243 Addr #: 25 LOC: 2 add Address 1: Mail stop 198 3ED
Vendor Name: Apple Incorporated Address 2: MS: 198-9IES
Address 3: 12545 Riata Vista Circle
City: Austin State: TX Zip: 78727-6524
Country: United States
Fax: 866/219-9213 Phone: 800/800-2775
Email: jordanbusiness@apple.com

Create Bid

New Vendor ~ Update Address

If you don't find the vendor you're looking for, you may add a new vendor.

Vendor Information

Vendor ID: Addr #: LOC: 1

Name: Test Tubes R Us

Address 1: 123 Brown St.

Address 2: PO Box 456

Address 3:

City: Any Town State: IA Zip: 50000

Country: United States

Fax: 319-338-6666 Phone: 319-338-7777

Email: info@tubesrus.com

☑ Vendor is new ☐ Update vendor address

Click the **Vendor is new** box ☑ Vendor is new which will open the fields for editing. Type the name, address, phones, and email address.

It is helpful to have an email address so that we may email the vendor to get the other necessary information to pay the vendor.

Clicking the **Update vendor address** box (if you have a different address found in the search center) will help our Vendor File keep up-to-date information.

Vendor Search

Search ☐ Starts With

* Note: Unless you click "Starts With", this search will find entries where your search entry is part of a word, or a whole word, and will ignore capitalization. If you click "Starts With", your search will find only entries that start with your search entry, once again ignoring capitalization. The search will look in the fields that are selected below for your search entry.

☑ ID ☑ Name ☐ Address ☐ City ☐ State ☐ Zip ☐ Phone ☐ Vendor TIN

Vendor Application Form To be Bid E-Mail Purchasing Vendor Team for Help

To Be Bid link: This can only be used on Orders $5000.00 and over. When the Initiator clicks on the To Be Bid button, a generic vendor number entitled, Vendor To Be Assigned automatically is populated on the Requisition. The requisition follows the appropriate departmental workflow path and, after the final departmental approval, is routed to the Purchasing Agent. The department should enter any necessary notes regarding the Request for Quote or Request for Proposal in the Internal Comments area on the Requisition. Any other information, such as specifications, quotation forms, etc. are to be sent to the Purchasing Agent via campus mail, email, or fax and identified with the Requisition #, date, Purchasing Agent name, Requester name and phone number.

E-mail Vendor Team for Help: If you need help with a vendor, click on this link to send an email to the vendor file team in Purchasing. Please include the following information in your message: Vendor name, full address, phone, fax, Tax ID# (FEIN), Vendor contact name, your name, and phone.

Near the Vendor Information section are **Conflict of Interest** statements. You must mark whether you do or don't have a relationship with the vendor.

Vendor ID: 376507 Addr #: 1 LOC: 1 add

Vendor Name: Positronic Industries Incorporated

○ Please mark here if you have no relationship with the selected vendor.

○ Please mark here if you have a relationship to the selected vendor.

Types of Relationships

Examples of a Conflict of Interest with a vendor include, but are not limited to:

Owning or acquiring a financial interest in, or having a consulting or other relationship with, any business entity that supplies goods, services, or finances to the University when the employee has decision-making authority for those transactions;

- Promoting or providing information about goods or services to the University community when the employee or his or her immediate family has a financial interest in or other paid relationship with the relevant business entity;
- Assuming or accepting any non-University duties requiring, or appearing to require, the use of University data, processes, procedures, or proprietary or confidential information.

#	Act	Qty	UOM	Category	Price	Extension
1	✕	1.0	Each	? add	$ 0.00000	$ 0.00000

Vendor Item ID: add
Mfg ID:
Mfg Item ID: add
Contract ID:

	fund	org	dept	sdept	grmt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
✕ add	050	11	1280	00000	52322200	6199	000	00000	10	0000			$0.00000

Add Line Item

Running Total: $ .00

The next section of the requisition is the Line Items. Start by entering the Quantity (Qty), Unit of Measure (UOM), Category, Price and Line Item Description in the text box.

Under **Category**, you may use one of your Category Favorites or manually type in the Category Code, if you know it.

Category Information Search

printers Search

* Note: this search will find entries where your search entry is part of a word or a whole word, and will ignore capitalization. The search will look in fields Category ID, Description, Buyer, and I-acct for your search value. To retrieve all category values, simply click the Search button.

ID	Description	Buyer	IACT	Contract ID
43212102	Dot matrix printers	Keiser,Jayne	6085	No
43212105	Laser printers	Keiser,Jayne	6085	Yes
42201710	Medical ultrasound or doppler or echo printers	Long,Mark	6090	Yes

Click the Spyglass under Category and this will take you to the Category Search Screen.

The Category Search will perform a search on the Description, Buyer Name, IACT or click on search with nothing entered to show all categories in alphabetical order.

Select the appropriate Category by clicking on the blue link in the ID column.

The Category Code assigned to the first line item determines the Buyer assigned to the requisition. The IACT initially defaults into the MFK from the Category, but can still be modified by the Initiator. Please note that the IACT that defaults may not be be valid for the particular items you are purchasing or may not work with the MFK you are using. Please be sure to check it for accuracy.

The Requester has assigned a default MFK to your profile. You may change it or use one from your MFK Favorites . If you use an MFK Favorite you can still modify the MFK on the main requisition screen by typing over the MFK element you want to change. If you'd like to split or add another MFK to this line item, click on the + next to the MFK Element headings to add another MFK line. You can make changes to the MFK elements by typing over them. You'll need to adjust the MFK Amounts accordingly if you add additional MFK's. The Org and Dept on the first MFK of the first line item determines which approval routing path the Initiator can choose from in Workflow.

#	Act	Qty	UOM	Category	Price	Extension
1	✕	5.0	Each	14000000 ? add	$ 150.00000	$ 750.00000

5lb weight reams of paper

Vendor Item ID: add
Mfg ID:
Mfg Item ID: add
Contract ID:

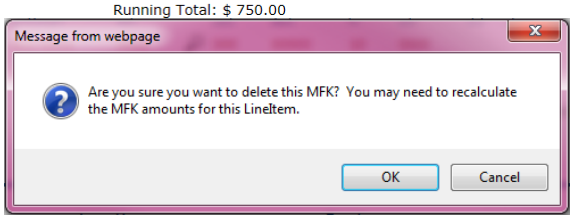
	fund	org	dept	sdept	grmt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
✕ add	520	11	1280	00000	80172000	0000	000	00000	10	0000			$450.00000
✕ add	050	11	1280	00000	52561000	0000	000	00000	21	0000			$300.00000

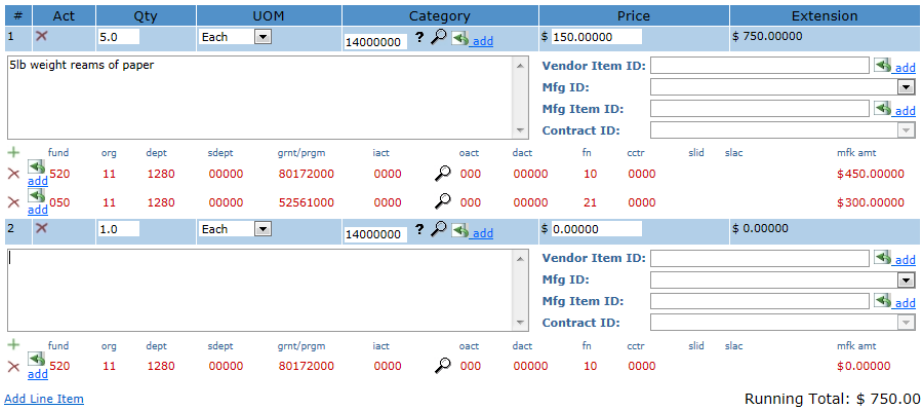
Add Line Item

Running Total: $ 750.00

To delete the MFK line click ✕ next to the MFK Line you want to delete. You'll receive the warning message shown below.

Click OK if you want to delete this MFK line.

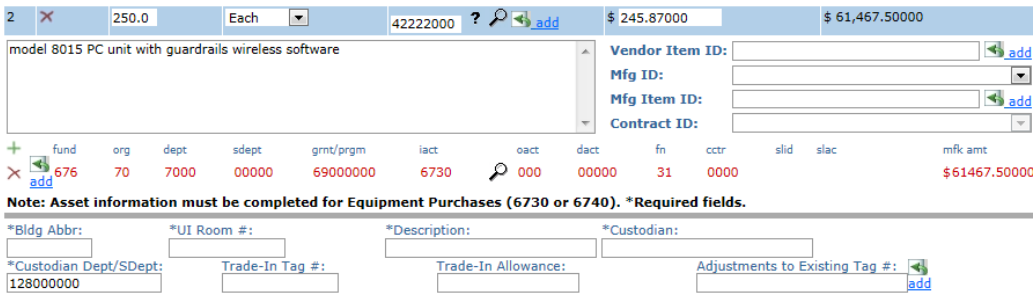




To add another Line Item click on Add LineItem link. Line Item 2 will then be available. Fill in the Qty, UOM, Category, Price, Line Description and MFK sections.

To delete a Line Item click the ✕ in the Act field. You will receive a warning message. Click OK if you want to go ahead and delete the line.

For the purchase of equipment and software, requesters have an area to communicate the purchase of an item with the vendor. This area may include vendor catalogue numbers that are not relevant for asset description.



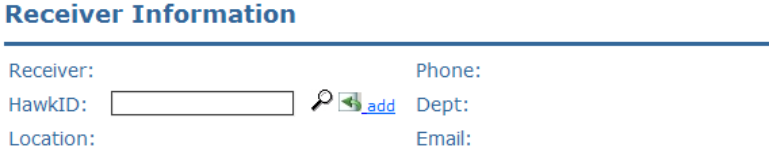
Because the vendor description may not be useful in describing the resulting asset, there is a second Description field within the asset information area to allow requestors to communicate asset descriptions to the Property Management Office.

General guidelines for this description field are:

- Enter "Noun" "Manufacturer or Model" "Description" where
  - "Noun" is the item being purchased
  - "Manufacturer" or "Model" – based on which is more relevant to identifying the asset.
  - "Description" provides additional specifics concerning what type of item is being purchased
- If there are multiple line items associated with an asset or quantities of the same asset, enter the same description in the Asset Information area for all associated line items.
- Freight does not need a description in the Asset Information Area.

Adding a Receiver

Any PReqs with IACT 6730 or 6740, ≥ $10K, ≥ $5K with IACT between 6200-6235, blanket orders (starting with B) and Contract Orders (starting with C) with IACT 6200-6235, 6730 or 6740 will require you to assign a Receiver (by Hawk ID) to enter when goods are received from an outside vendor.



The **Receiver Information** is under the last line item detail.

Use the spyglass to search or type the HawkID of the individual you wish to designate to receive the goods/services.

The Receiver you select will receive an email with a link to the PReq after the PO number is assigned.

Subject: PO# 1000866362: Will need receipt info

Dear Sir or Madam,

This email serves as a notice to you that requisition #W000225407 has been created indicating you as the Receiver. Once your goods and/or services have been received you are required to enter receipt information on the requisition. You can add/update receiving information by clicking on the "Receiving" link underneath the workflow approval section. Please note that receiving information is required on this transaction in order for payment to be processed on corresponding vouchers against the Purchase Order.

- Requisition #W000225407 created PO #1000866362
- Vendor name: Bright Eyes And Bushy Tails
- First line description: test final pcard
- Total amount of order: $6,418.99

Direct receiving questions/suggestions to preqs@uiowa.edu.

For further details on Receiving after goods are received see the PReqs Receiving Guide or Receiving FAQs.

Attachments

- You may attach any file type
- Emails – While in the email, do a File/Save As and give the email a document name
- Paper documents – A paper document must be scanned and saved in electronic format
- Multiple documents may be attached

Attachments

Act	File Name	File Type	Attach Date
Nothing found to display			

L:\AP_Purchasing\Purch Browse... Upload Attachment

Attachments

Act	File Name	File Type	Attach Date	Attachment Type	Send to Vendor
✕	MonthlyCreditLimit.pdf	application/pdf	05/20/2010 10:27AM	Quote	Yes 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

Click on Browse and choose a file to upload.

The attachment path is now located in the box. Click on Upload Attachment.

Once uploaded, you need to select the **Attachment Type** and whether it needs to be sent to the vendor. Invoice, Sole Source, and Conflict of Interest will default **No**, and will not be sent to the vendor.

A date/time stamp will disply in the **Attch Date** column.

If the attachment needs to be **deleted** click on the ✕ under **Act**.

Comments

Vendor: Please RUSH this order. add

Internal: Special Project #23514 add

The next section is the Vendor and Internal Comments that also include **Favorites**. Text entered in the Vendor Comments section will print on the Purchase Order sent to the vendor. Text entered in the Internal Comments section remains as an internal note to others in the department and/or Purchasing.

Order Placed, Blanket Order Questions, Pre-payments greater than $5000, Sole Source Justifications

○ 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.

○ Yes ◉ No Is this a Blanket Order?

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

☐ View Sole Source Form

The answers to the questions asked regarding order placed with vendor and receipt of invoice will default from the Order By page.

You may change your answer if needed.

Blanket Orders: Under the comments there is a question for Blanket Orders. Blanket Orders must be $5000 or greater before it will validate and route through workflow. This ensures that PReqs checked "Blanket Order" will route to the Purchasing Agent for review. The resulting purchase order will begin with the prefix "B" to designate a blanket purchase order. If **Yes** is selected, another question will display, "Do you have preferred vendor pricing?...".

○ Yes ◉ No Do you have preferred vendor pricing? If so, please attach price listing.

If you did receive preferred pricing from the vendor, please attach to the PReq using the steps under the Attachments section.

Prepayments: Also under the comments there is a check box for Prepayments. Check this box, if the vendor requires prepayment.

View Sole Source Form: If this box is clicked, the Sole Source Justification Form displays. Sole Source Justifications should completed if the purchase is $25K or more and is not going to be bid (also required if a conflict of interest vendor over $2K). When the PReq is Saved or Validated, the completed Sole Source Justification form becomes a part of the requisition. All sole source purchases must be reviewed and approved by purchasing. Valid reasons for allowing a sole source purchase can be found at http://www.uiowa.edu/~our/opmanual/v/11.htm#119.

Action Section ~ Save, Validate, Send to Workflow, Void

The last section of the PReq contains actions you take with the requisition.

Save - saves a requisition. You can work on it later.

Validate - validates all fields on the requisition including the MFK.

Send to Workflow - sends requisition into the Workflow System.

Void - If for some reason an Initiator needs to void a requisition that they have saved or validated but have not sent to Workflow they can click on Void and the Requisition is voided.

When the form is complete, click the Send to Workflow button. The PReqs system is now integrated with the workflow system. (Contact your Workflow Administrator if you have questions.)

Save | Validate | Send to Workflow | Void

Workflow

Select the appropriate Workflow group from the list and click on "Continue."

Initiate Workflow Process

You are entering a Requisition - 5,000 to 25,000 into the UI Workflow System.

Please choose a workflow group from the following list.
If you don't see the group you wish to use, please click here to choose a different department for routing.

	ORG / DEPT	SUBLEVEL
◉	VPFO-Purchasing	09030-SW/MC
○	VPFO-Purchasing	PReqs_Inventory
○	VPFO-Purchasing	PReqs_testing

Continue

Workflow Routing
Workflow for: Requisition - 5,000 to 25,000 (Transaction 2386387)

This transaction was entered into Workflow on 07/06/2010
The Workflow Inbox displays this basic information: 1089273 | Julie Bergeon | | PAQ | Dimitri Wine And Spirits Incorporated | W000226466
View the entire projected Workflow path for this form.

WORKFLOW OPTIONS FOR: REQUISITION - 5,000 TO 25,000 (TRANSACTION 2386387)

You are viewing all options for this form.
To view Approval options only, click here. To view "Do Not Approve" options only, click here.

You are responsible for routing this form to its next step, using this application.
Please choose from the following options:

◉ Send to the next approval level as listed here:

Employee ID	Name	Approval Level	Approval Type
1005940	HOUSEL,KAREN L	SUBLEVEL	May Approve
1013688	JETTER,JAMES L	SUBLEVEL	May Approve
1021689	PORTWOOD,JENNIFER ELLEN	SUBLEVEL	May Approve
1026227	LEICHTY,CHRISTINE L	SUBLEVEL	May Approve
1026470	SOPHER,ANNE M	SUBLEVEL	May Approve
1029666	HYCHE,DENISE A	SUBLEVEL	May Approve
1089273	BERGEON,JULIE ANN	SUBLEVEL	May Approve
1104961	HACHMEISTER,JAMIE L	SUBLEVEL	May Approve
1139717	WATKINS,JOHN E	SUBLEVEL	May Approve

○ Send to the next approval level plus someone from my alternates list.
(specify on next page)
○ Send to an alternate for intermediate approval.
(specify on next page)
○ Void this form, removing it completely from workflow.
You will be asked for further confirmation.

Continue

You will proceed to the Approval/Routing screen where you will have four choices for routing.

You may also choose to:

- "Approve and send to the next approval level plus someone from my alternates list"
- "Approve and send to next plus someone from your alternates list.
- "Approve and send to an alternate for intermediate approval." Or
- Void the form

Alternates: An alternate is someone not in the established approval route that you would like to send the form to on an ad hoc basis.

Confirm Workflow Routing

CONFIRM ROUTING FOR: REQUISITION - 5,000 TO 25,000 (TRANSACTION 2386387)

This transaction was entered into Workflow on 07/06/2010
The Workflow Inbox displays this basic information: 1089273 | Julie Bergeon | | PAQ | Dimitri Wine And Spirits Incorporated | W000226466
View the entire projected Workflow path for this form.
You are processing this form; it will proceed through the workflow system as follows:

You have chosen to use the default workflow routing.

Name	Approval Type
HOUSEL,KAREN L	May Approve
JETTER,JAMES L	May Approve
PORTWOOD,JENNIFER ELLEN	May Approve
LEICHTY,CHRISTINE L	May Approve
SOPHER,ANNE M	May Approve
HYCHE,DENISE A	May Approve
BERGEON,JULIE ANN	May Approve
HACHMEISTER,JAMIE L	May Approve
WATKINS,JOHN E	May Approve

Press Continue to approve this routing:

Continue

If you select "Approve and send to the next approval level as listed here," you will go directly to the Confirm Screen.

Select Alternates for Workflow Routing

SELECT ALTERNATE APPROVERS FOR: REQUISITION - 5,000 TO 25,000 (TRANSACTION 2386387)

This transaction was entered into Workflow on 07/06/2010
The Workflow Inbox displays this basic information: 1089273 | Julie Bergeon | | PAQ | Dimitri Wine And Spirits Incorporated | W000226466
View the entire projected Workflow path for this form.

You have selected to route this form to individuals outside the workflow path. *Please select the specific individuals to whom you wish to route this form by clicking their boxes to the left of their names.*

Add New Workflow Alternate

NAME	EMAIL	TYPE OF APPROVAL REQUESTED
ANKRUM,PATRICIA L		View Permitted Required
ANNIS,LINDA ANN		View Permitted Required
BAUER,COLLEEN DENISE		View Permitted Required
BELL,BRENDA JEAN		View Permitted Required

If you select either of the "**send to an alternate**" choices and you have an alternates list established, you will see your alternate listing.

Click in the check box next to the individual you have selected as the alternate.

"Alternates" for Ad Hoc Approval
Search for Alternate

Please select the Employee to add to your Ad Hoc Approval List

Employee ID:
Last Name:
First Name:
Reset Continue

If you choose "Add New Workflow Alternate", you may type employee ID, last or first name.

"Alternates" for Ad Hoc Approval
Add Alternate

You are selecting **1005940 / HOUSEL,KAREN L** to your Ad Hoc Authorization List:

Click to store this employee on your ad hoc list:

Process Request

Click **Process Request** to add this person.

Select Alternates for Workflow Routing

***SCHNEIDER,CINDY ANN* was added to your alternates list and has automatically been selected as a required alternate on this page.**

SELECT ALTERNATE APPROVERS FOR: REQUISITION - 5,000 TO 25,000 (TRANSACTION)

This transaction was entered into Workflow on 07/06/2010
The Workflow Inbox displays this basic information: 1089273 | Julie Bergeon | | PAQ | Dimitri Wine And Spirits Incorporated | W000226466
View the entire projected Workflow path for this form.

You have selected to route this form to individuals outside the workflow path. *Please select the specific individuals to whom you wish to route this form by clicking their boxes to the left of their names.*

Your alternate is now displayed in the list.

Confirm Workflow Routing

CONFIRM ROUTING FOR: REQUISITION - 5,000 TO 25,000 (TRANSACTION 2386387)

This transaction was entered into Workflow on 07/06/2010
The Workflow Inbox displays this basic information: 1089273 | Julie Bergeon | | PAQ | Dimitri Wine And Spirits Incorporated | W000226466
View the entire projected Workflow path for this form.
You are processing this form; it will proceed through the workflow system as follows:

You have chosen to select additional individuals to accompany the default workflow routing.

Name		Approval Type
HOUSEL,KAREN L		May Approve
JETTER,JAMES L		May Approve
PORTWOOD,JENNIFER ELLEN		May Approve
LEICHTY,CHRISTINE L		May Approve
SOPHER,ANNE M		May Approve
HYCHE,DENISE A		May Approve
BERGEON,JULIE ANN		May Approve
HACHMEISTER,JAMIE L		May Approve
WATKINS,JOHN E		May Approve
SCHNEIDER,CINDY ANN	(SELECTED AS AD-HOC APPROVER)	Required

Press Continue to approve this routing:

Continue

You will continue to the verification screen. Click **Continue**.

Finish Workflow Routing

You have approved this form; it will proceed through the workflow system.

To return to the Web Purchase Requisition / E-Voucher System, please click here.

You will continue to a screen that verifies your form has been successfully routed and approval is complete.

After workflow is complete, the requester, initiator, and purchasing agent will receive an email stating the assigned PO number. After the PO number has been assigned the requisition uploads to PeopleSoft and order is dispatched to vendor via email, EDX, or faxed by Purchasing.

Note: A minimum of two electronic signatures on PReq transactions is required at the departmental level.

Change History on a PReq

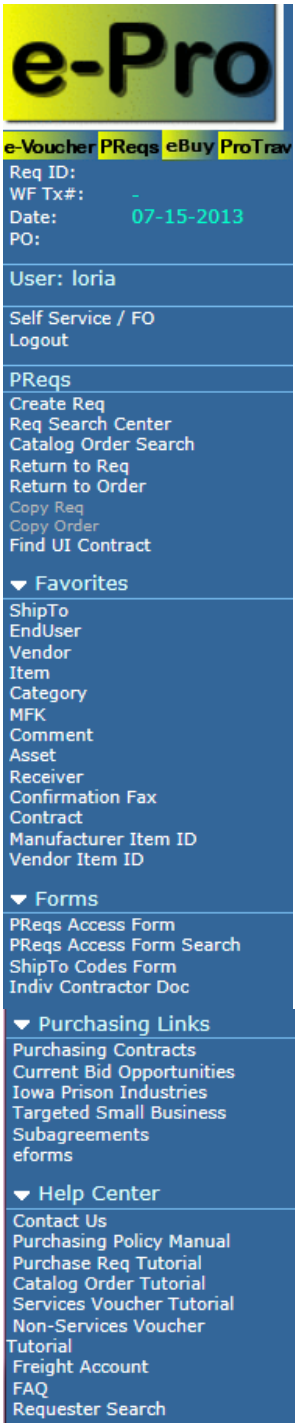
Once the Requisition is Inside Workflow, the Workflow path will be displayed. Each time a change is made to the PReq after it is sent to Workflow, the system logs the change.

Clicking on the Change History button on the main PReq page displays a recap of all changes that have been made on this PReq and who made the change.

When there is no change history to view for a Requisition, the Change History button is disabled.

Change History

Modified By	Date	Field	Prior	Current
pcarleto	06-15-2010 08:33:07 AM	Vendor Comment	Contact Kris Kluseman 319-335-3636 for questions and additional information * Send Invoices to: The University of Iowa * Accounts Payable/Travel * 202 Plaza Centre One * Iowa City IA 52242-2500 Please write PO# on each invoice! File Path: T:\CAP\U\UI\IA\Iowa City\BioVenture Center\RFP\Sales\Quotes\HMI -XXXXX_XXX-Q-061110.sp4	Contact Kris Kluseman 319-335-3636 for questions and additional information. Send Invoices to: The University of Iowa * Accounts Payable/Travel * 202 Plaza Centre One * Iowa City IA 52242-2500 Please write PO# on each invoice! File Path: T:\CAP\U\UI\IA\Iowa City\BioVenture Center\RFP\Sales\Quotes\HMI -XXXXX_XXX-Q-061110.sp4
pcarleto	06-15-2010 08:32:43 AM	Vendor Comment	Contact Kris Kluseman 319-335-3636 for questions and additional information * Send Invoices to: The University of Iowa * Accounts Payable/Travel * 202 Plaza Centre One * Iowa City IA 52242-2500 * Please write PO# on each invoice!	Contact Kris Kluseman 319-335-3636 for questions and additional information * Send Invoices to: The University of Iowa * Accounts Payable/Travel * 202 Plaza Centre One * Iowa City IA 52242-2500 Please write PO# on each invoice! File Path: T:\CAP\U\UI\IA\Iowa City\BioVenture Center\RFP\Sales\Quotes\HMI -XXXXX_XXX-Q-061110.sp4
pcarleto	06-15-2010 08:32:43 AM	Internal Comment	FY '10 FUNDS	FY '10 FUNDS Novation/UI Contract Ref #H7207A



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 Center for negotiated pricing with vendors.

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: 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.

Current Bid 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

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'.

Search

Requisition ID	Equal To		
PO ID	Equal To		
eBuy Shopping Cart ID	Equal To		
eBuy Shopping Cart Name	Equal To		
eBuy Catalog Num	Equal To		
Requisition Date	Equal To		
Requisition Status	Equal To		
Initiator (HawkID)	Equal To		
Requester Code	Equal To		
Requester Name	Equal To		

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 three 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.

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

32 Requisitions found.

Req #	Initiator	End User	Status	PO ID	PO Date	PO Type	PO Status	Vendor Name	Req Amt	Description	Attach	Order ID	Paid by PCard
W000225721	heefner	Jamie Hachmeister	Workflow Complete	1000866602	2010-05-24	Regular Order	Dispatched	Arthrex Incorporated	$ 15,890.00	Anchor 3.0 BioComposite Suture		SC00090295	No
W000225631	humpleby	Jamie Hachmeister	Workflow Complete	1000866537	2010-05-21	Regular Order	Complete	Jimmy Jacks Rib Shack	$ 6,800.00	test copy final pcard			Yes
W000225630	humpleby	Jamie Hachmeister	Workflow Complete	1000866536	2010-05-21	Regular Order	Complete	Jimmy Jacks Rib Shack	$ 6,800.00	test			Yes
W000225629	humpleby	Jamie Hachmeister	Workflow Complete	1000866535	2010-05-21	Regular Order	Dispatched	Jimmy Jacks Rib Shack	$ 5,800.00	test			No
W000225621	heefner	Jamie Hachmeister	Workflow Complete	1000866528	2010-05-22	Regular Order	Dispatched	Guidant Corporation	$ 5,781.00	Catheter Dilitation 4.0 c		SC00090246	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.

PReq Guidelines

Responsibilities of an Initiator

Throughout the purchasing process everyone is held to the same standards to assure that a purchase is appropriate, valid, for the benefit of the university, supportable, and all purchasing controls are utilized. However, the initiator is in the unique position of making sure the entire process starts on the right foot.

- Planning ahead (will you need extra time for approval or bids, is the purchase time sensitive)
- Finding best price and working with Purchasing
- Making the decision on which purchasing tool is best suited for their specific purchase (eBuy, PCard, PReq, eVoucher, Item Catalog orders)
- Entering orders completely and accurately
- Providing documentation of pricing
- Validating order and sending to workflow
- Ensuring the appropriate departmental approvals are acquired

On requisitions less than $5000.00 the purchase order number is assigned after the last departmental Workflow approval. These requisitions will not be routed to Purchasing for approval. This will allow departments to obtain their PO numbers in a timely fashion and should eliminate the need for obtaining advance PO #'s from Purchasing for rush or emergency orders. After the Purchase Order number is assigned, the PReq will be loaded to the PeopleSoft system. The Purchasing Dept will mail or fax a hard copy of the PO to the Vendor.

When completing the PReq, indicate whether the pricing is quoted or estimated. Reference the quote number and or person who provided the quote. Put this information in the Line Items, Vendor Comments, or add attachment document fields if there are many line items.

If pricing is estimated, put a Comment in the Internal Comment field. Departments must attempt to get firm pricing before approving orders less than $5000.00.

The PReqs system will not allow zero dollar amount requisitions.

Generic Ship-To Codes: These Ship-to codes are available for use by all Departments. Most departments use these codes when they want goods delivered to a special address or when they want to pick up the goods. Further information on these codes can be obtained from the Procure to Pay Manual.

Subawards: All orders for Subawards must go through the Division of Sponsored Programs. See http://dsp.research.uiowa.edu/ for more information.

Orders for Trial Merchandise: The PReqs system will not allow zero amount Purchase Orders. Contact the appropriate Purchasing Agent for assistance with orders for trial merchandise.