PReqs Access/Update Form

The PReqs Access form needs to be completed to Add, Update or Delete requester/initiator information. Before users can create requisitions, catalog orders and place orders in eBuy you have to be granted access. This form will need to be filled out by the Requester. The Requester is the departmental, unit or division representative who directly works with Purchasing and Accounts Payable. Initiators are individuals who have been given authority to do requisitions on behalf of a Requester. Without filling out the form you can still access PReqs, but you will not be able to Create Req. If the "Create Req" link is not active on the sidebar you will need to complete the PReqs Access Form.

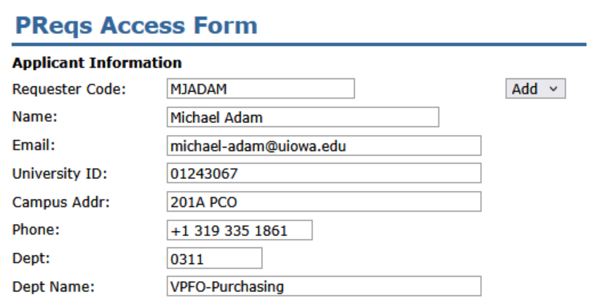
Accessing the PReqs Access/Update Form

How to find the Preqs Access Form

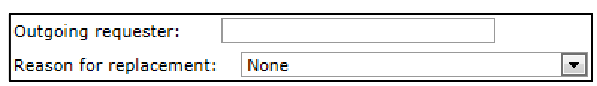
1. Sign in to **Employee Self-Service**.
2. Navigate to **Business & Financial Systems**.
3. Click **ePro (eVouchers, Preqs/Receiving)**.
4. You will land on the **One Stop-eProcurement Page**.
5. Click **PReqs**
6. In the blue bar on the left side under **Forms**, click **PReqs Access Form**.

PReqs Access Form

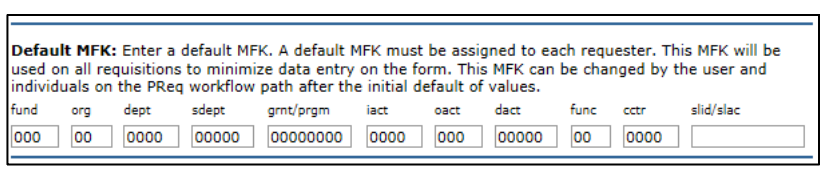
Review Applicant Information – This information defaults in. Please review to see if information is correct. If not correct go to Self Service and update your campus address under My Self-Service / Personal Information / Address and Phone Change / Campus Mailing Address.



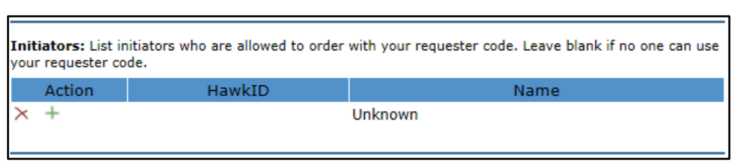
If you are replacing a Requester within your Department, be sure to complete the Outgoing Requester and Reason for Replacement.



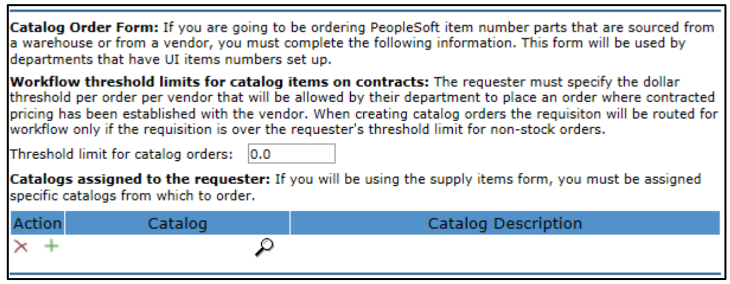
Complete the Default MFK. The MFK you provide on this form will automatically be used on all requisitions you create. Please note that these can be changed on each Order. If you have trouble validating the form make sure you've entered the iact and oact.



If no Initiators are needed, click the ✕. If you need to add an initiator(s) that will be allowed to order with your requester information enter their Hawk ID. If you need to add more, click the + .



The last section needs to be completed if requesting access to PeopleSoft Catalogs. Enter a workflow threshold Limit for Catalog Orders sourced to the Vendor. Click on the Search to add a Catalog (catalogs begin with UH or UI) and if you need to add more, click the + .



Catalog Order Form: If you are going to be ordering PeopleSoft item number parts that are sourced from a warehouse or from a vendor, you must complete the following information. This form will be used by departments that have UI items numbers set up.

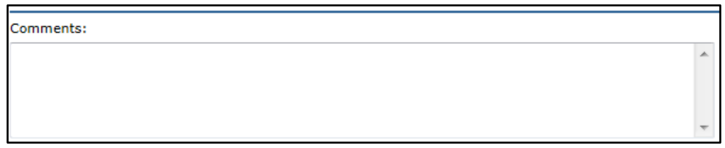
Workflow threshold limits for catalog items on contracts: The requester must specify the dollar threshold per order per vendor that will be allowed by their department to place an order where contracted pricing has been established with the vendor. When creating catalog orders the requisiton will be routed for workflow only if the requisition is over the requester's threshold limit for non-stock orders.

Threshold limit for catalog orders: 0.0

Catalogs assigned to the requester: If you will be using the supply items form, you must be assigned specific catalogs from which to order.

Action	Catalog	Catalog Description

Enter any comments that will be helpful for Purchasing Operations to complete this form request. Also, if you need receiver(s) listed in your Available Receiver List, please provide their full name and HawkIDs. You may have multiple receivers from your department in your list, but you will need to have at least one receiver to place orders. You may tell us in this space your building and office room number, and if you need us to remove Initiators from your current setup.



Comments:

Finalize form by clicking Save, Validate, Send to Workflow or Void.
Save: Saves your PReqs Access form so that you can work on it later.
Validate: Validates all fields on the Preqs Access form, including the MFK.
Send to Workflow: Sends the form into the Workflow system. You will need at least one other approver in workflow.
Void: Cancels the form if no longer needed.
Req Admin ID: Is an ID (RA000xxx) that is assigned for tracking purposes. Once your Requester Information is setup, you will receive an email notification and be asked to complete the Procure to Pay training class. This class provides an overview of Purchasing and Accounts Payable.

Workflow

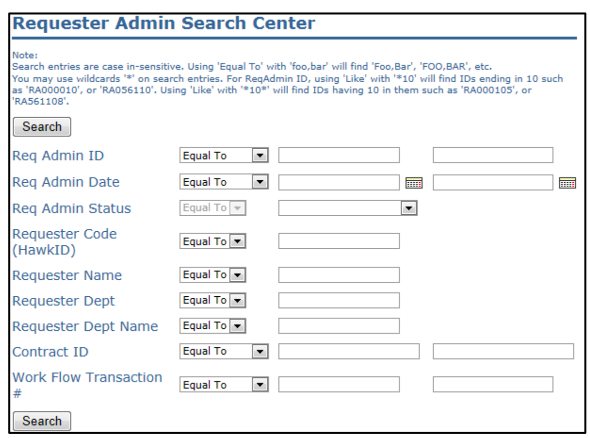
Workflow is the process of creating and approving various types of forms electronically. Based on predetermined Workflow Paths (as set by Org and Dept workflow administrators), these forms can be approved electronically and sent on to the next person in the approval path.

Requester Admin Search Center

If you need to see the status of a PReqs Access form, or need to make more updates to a draft, go to the Requester Admin Search Center.

Search for Preqs Access form status by going to the Sidebar>Forms>**PReqs Access Form Search.**

Enter any criteria and click Search.



Requester Admin 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 ReqAdmin ID, using 'Like' with '*10' will find IDs ending in 10 such as 'RA000010', or 'RA056110'. Using 'Like' with '*10*' will find IDs having 10 in them such as 'RA000105', or 'RA561108'.

Search

Req Admin ID	Equal To
Req Admin Date	Equal To
Req Admin Status	Equal To
Requester Code (HawkID)	Equal To
Requester Name	Equal To
Requester Dept	Equal To
Requester Dept Name	Equal To
Contract ID	Equal To
Work Flow Transaction #	Equal To

Search