IOWA

Purchase Requisitions (PReqs) Guide

This guide is for the process of ordering Services, Equipment, Repairs, Contract Orders, and Subagreements by description only, which go to an outside vendor. The Purchase Requisition system (PReqs) is part of the University of Iowa on-line E-Pro application and is used as a primary vehicle for the purchase of any goods or services by initiating a Requisition which will later generate a Purchase Order (PO).

- Non-eBuy Requisitions over $25,000 are routed to the assigned Purchasing Agent in workflow.
- eBuy Requisitions over $100,000 are routed to the assigned Purchasing Agent in workflow.
- Requisitions under $25,000 will be assigned a Purchase Order after the last departmental approval in workflow in most cases.
    - The Department accepts all responsibilities of Purchasing Policies and for the approval of these Requisitions with the exception of Capital Equipment, Blanket Orders, To be Bid Orders and New Vendors.
    - Proper transaction approvals include the Initiator/Requester plus one or more departmental approver.
- If the Procurement Card (PCard) is not accepted or the Vendor is not listed in eBuy, create a purchase requisition.
- Purchases, $100,000 and above are required to go out for competitive bids (for non-federally funded purchases).
- Federally funded purchases will remain at $50,000 for competitive bidding.

Approved conflict of interest (COI) vendors being paid $2,000 and over require a competitive bid.

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Accessing System

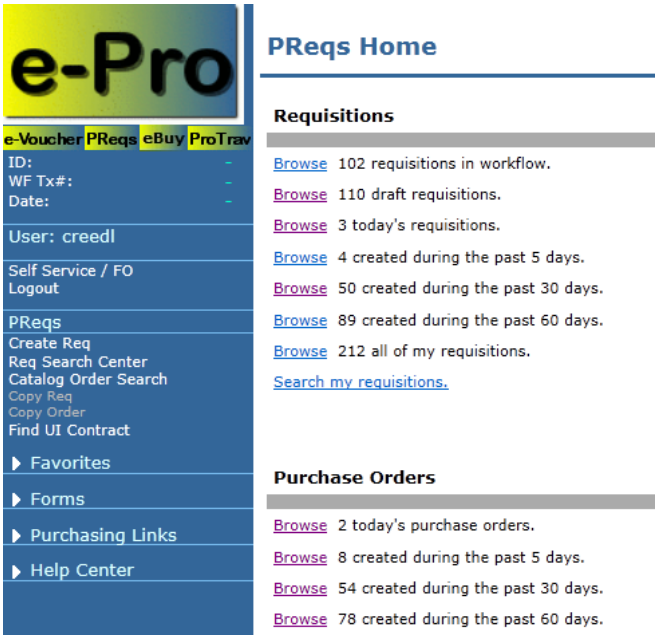
How to Access ePro (eVouchers, PReqs/Receiving)

1. Sign in to **Employee Self-Service**.
2. Navigate to **Business & Financial Systems**.
3. Click **ePro (eVouchers, Preqs/Receiving)**.

You will land on the **One Stop-eProcurement Page**.

If you need assistance with Preqs, please send an email to: preqs@uiowa.edu.

PReqs Homepage



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 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

Requisition Center

Req #	Req Date	End User	Status	Vendor Name	Req Amt	Description	Attach	Order ID	Paid by PCard	On Contract
W000541937	2012-03-08	Jamie Hachmeister	Sent to Workflow	Pepsi Beverages Company	$ 8,554.76	Test for speed			No	Yes
W000541952	2012-03-12	Cindy Schneider	Inside Workflow	Pepsi Beverages Company	$ 25,500.00	contract over $25K			No	Yes
W000541953	2012-03-12	Cindy Schneider	Inside Workflow	Nike USA Incorporated	$ 12,539.50	confirming w/invoice	Invoice		No	No
W000541959	2012-03-13	Cindy Schneider	Inside Workflow	Spring is in the Aire	$ 4,154.43	New Vendor to CB			No	No

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.

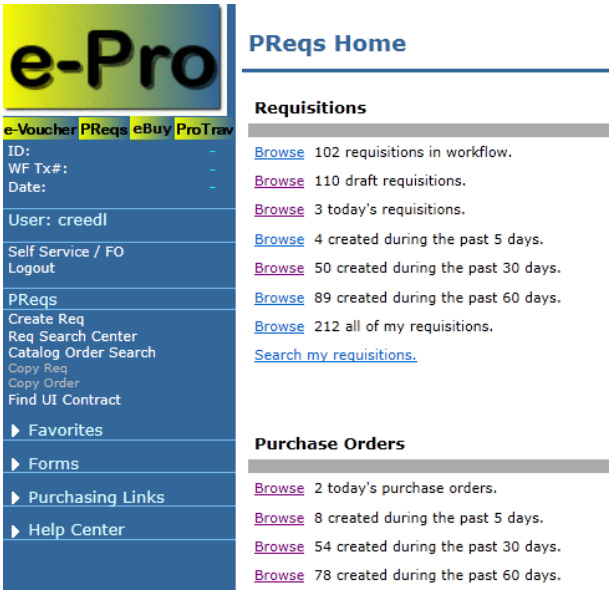
Workflow Void - Requisition voided in Workflow

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 PReqs 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	Paid by PCard	On Contract
W000541868	Cindy Schneider	1000979506	2012-03-27	RFQ Order	Approved	Pepsi Beverages Company	$ 21,369.30	Polymer Foam Beds		No	No
W000542075	Jamie Hachmeister	1000979488	2012-03-23	Regular Order	Dispatched	Nike USA Incorporated	$ 3,500.00	PREPAYMENT		No	No
W000542080	Cindy Schneider	1000979490	2012-03-23	Regular Order	Dispatched	Nike USA Incorporated	$ 5,057.68	COPY REQ W/NEG AMNT		No	No
W000542081	Cindy Schneider	1000979491	2012-03-23	Regular Order	Dispatched	Apple Creek Publishing	$ 2,750.00	1000 char maxGeorge Clooney in		No	No

Purchase Order Status Section

The definitions for the Purchase Order statuses are:

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. Funds are encumbered.

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 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 the arrow to expand the menu Favorites, then click on the **ShipTo** to get to this screen.

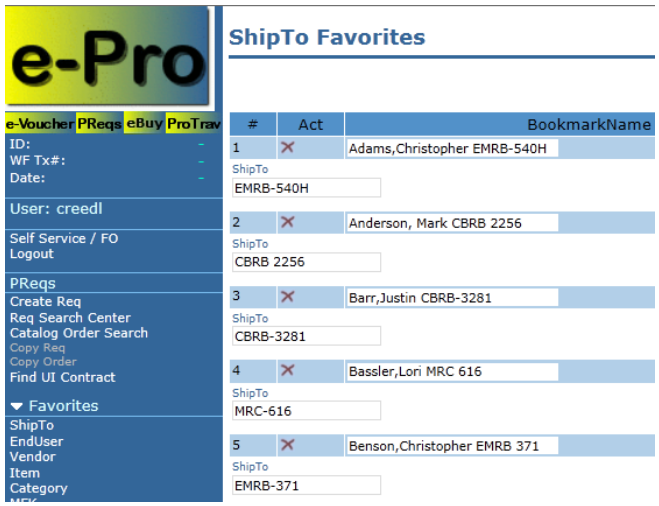
The **Bookmark Name** is a title you assign to the Favorite to identify and remember it by. It can be anything you want.

Fill in the ShipTo fields and click Save

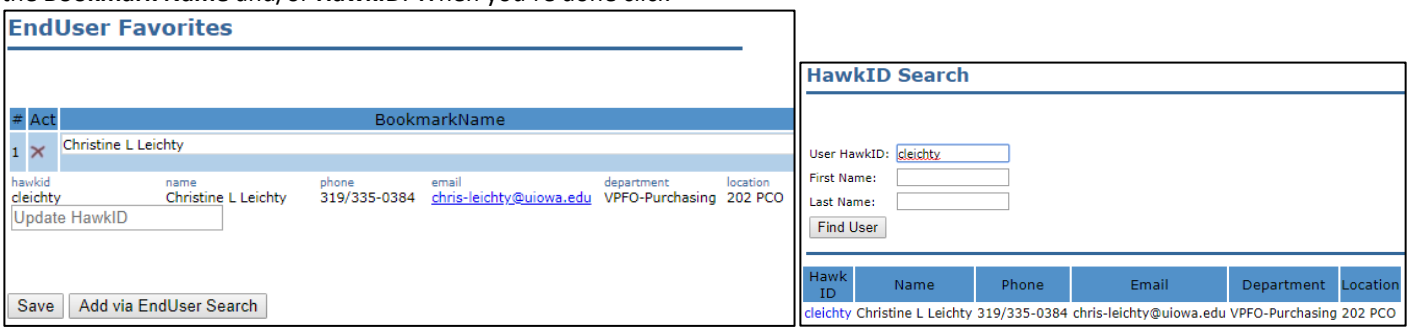
Click Add to add another.

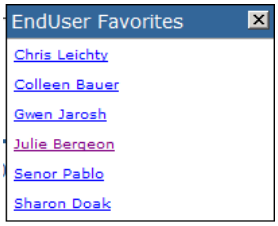
Always remember to save after adding any new entries.

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



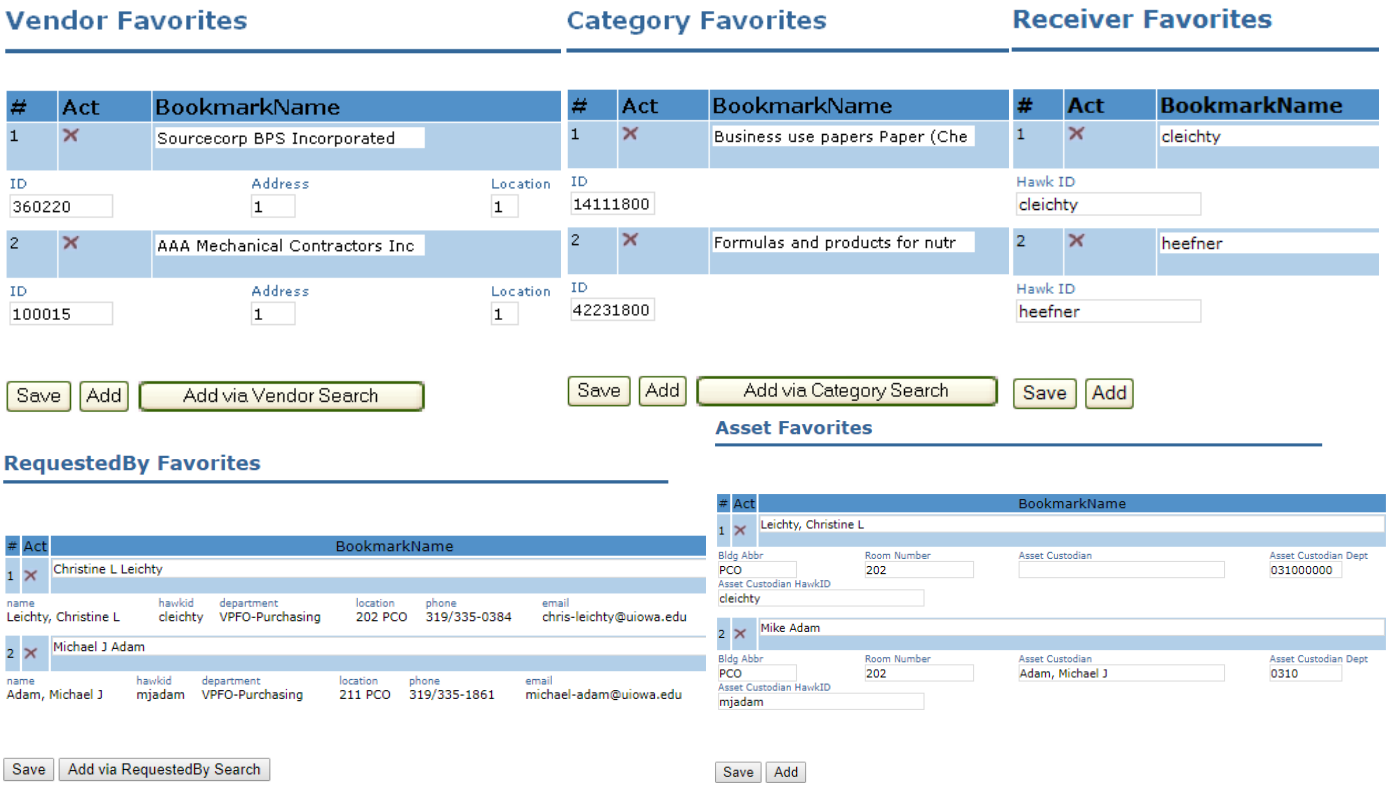
When you click **End User** under **Favorites** you may click **Add via EndUser Search** to add new EndUser's to your favorites. This will allow you to search by HawkID or name. After clicking **Find User** click the HawkID link to add. For existing favorites you can update the **Bookmark Name** and/or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



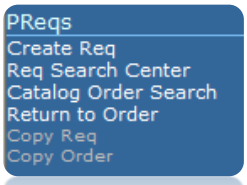


Wherever you see the in the PReq form, a window displays a list of your favorites.

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

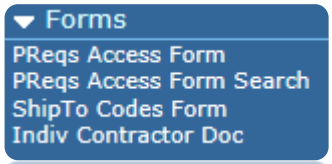


Create a New Requisition

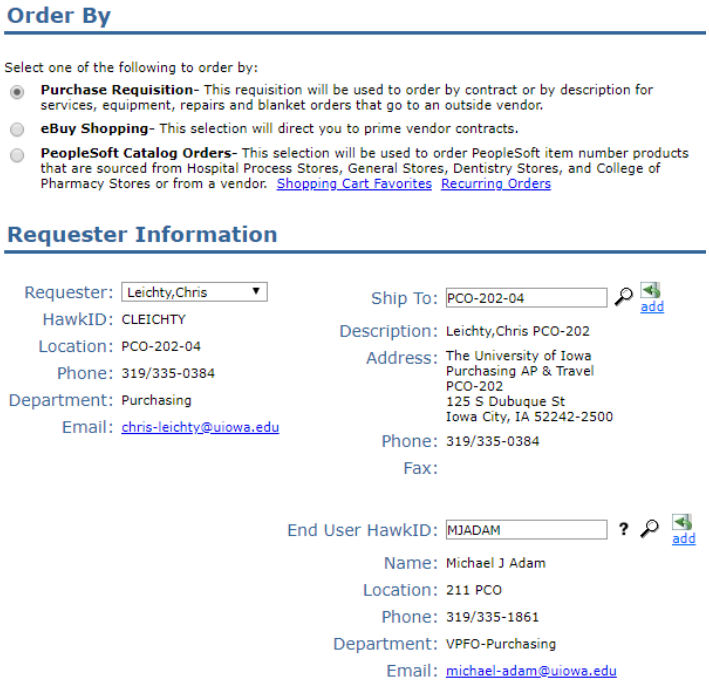


Click on the **Create Req** link on the side bar and you'll get the **Order By** page below

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



A Requisition starts with the **Order By** page. The Order By page is followed by a short series of steps that include filling out the Requisition, submitting to Workflow, processing a Purchase Order and verifying when the order is Received. As we proceed through these pages you will be able to see how much of the information is automatically filled and that the system will prompt you if information is missing to assure that everything is filled out correctly to avoid any unnecessary delays in ordering. Start by selecting the **Purchase Requisition** option. Next, complete the **Requester Information** section, all fields are required however, these will default based on the last order and only need to be updated if there changes.

Requester: This person is the departmental, unit or division representative who directly works with Purchasing and Accounts Payable. Their name will be associated with every order. If any questions arise in regards to the PReq the Requester is the person that Purchasing and Accounts Payable will typically contact for information. When you select a requester from the drop down menu, the remaining information is automatically populated.

Ship To: The Ship To code fills in automatically after the Requester is selected, but this can be updated manually by typing in a new Ship To, or you can use the Search function to choose a different Ship To or you can use the Favorites option to select an alternate Ship To (click the add link if you want to add the Ship To code to your list of Favorites). 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. You can also add using the Favorites function (click the add link if you want to add the End User to your list of Favorites).

Default MFK: This MFK will default in on the Requisition and can be changed on the Order Line if needed

Confirming Order: Placing orders without a Purchase Order or PCard are an exception to the normal process and are highlgy discouraged by Purchasing. This is for the protection of the University. The University is not required to make a payment to vendors without an approved Purchase Order. One acceptable use for a Confirming Order would be an emergency repair of equipment that is essential to the Unviersity's mission. Confirming Purchase Orders work in the inverse order of accepted practices, which is after an item has been received by a department, a Purchase Order is generated. An order without a Purchase Order or PCard is not acceptable. This questions is to acknowledge or deny if the Order was already placed. This question defaults with No, however by changing to Yes, you have alerted Purchasing to NOT Send the Order to the Vendor.

Purchasing highly discourages departments from placing orders without a procurement card or purchase order, for the protection of the University. The University is not required to make a payment to vendors without an assigned purchase order.

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.

Continue

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. When generating a Confirming Requisition you must check "Yes" for "Has the order already been placed with the Vendor for the goods or services?"

Yes No Have you already received the goods or services? If "Yes" is selected, please attach the payment invoice to this PReq to be processed for payment.

Default MFK

050 05 0311 00000 50649100 6026 000 00000 60 0000

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.

Click the Continue button to move forward to the **Requisition** Page.

Requisition Page

The Requester, Ship To, and End User sections collapse.

1. Requisition | 2. Workflow | 3. Purchase Order | 4. Received

The progress bar lets you know the status of your order as it moves thru the system.

Review Requester Information

Requester Tester,Mabel

Ship To add PCO-202-10

End User add Jamie Hachmeister

You can still change any of this information by clicking the link.

Requester Bergeon,Julie

Requester

Requester: Tester,Mabel
HawkID: JBERGEON
Location: PCO-202-22
Phone: 319-335-1726
Dept: Purchasing
Email: julie-bergeon@uiowa.edu

End User add Michael J Adam

End User

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

Contracts

Purchasing has negotiated **Contracts** with Vendors to get better pricing. If you know the **Contract ID**, you can manually add to the Requistion or you can Search all UI Contracts, or select a Favorite to apply to the Order. This will automatically apply the Vendor Information in the next section. The mission of the University of Iowa Purchasing Department is to obtain quality goods and services at the lowest reasonable cost, while operating at the hightest standards of eithical conduct. The Purchasing Department strives to identify and implement Purchasing Contracts with perferred Vendors. This provides the lowest competitive price consisent with the University's standard of qualtity and service. Purchaseing Contracts minimize the inistutions' effots while maximizing commodity volume to gain better prices which otherwise could not be achieved.

Find a UI Contract and Apply to Order

Contract ID: add Contract Description:

Apply this Contract to all lines.

You may search by Contract, Vendor, Category, or Products/Services.

Click the Contract ID to apply it to your order.

This will populate the field and enter the vendor information.

Find a UI Contract and Apply to Order

Contract ID: 0000000300000000000003664 add Contract Description: Computers/ipads

Apply this Contract to all lines.

Vendor Information

Vendor ID: 102243 Addr #: 21 LOC: 2 add

Vendor Name: Apple Incorporated

Address 1: Education Sales Support
Address 2: MS 198-40SW
Address 3: 12545 Riata Vista Circle
City: Austin State: TX Zip: 78727
Country: United States

Find a UI Contract and Apply to Order

Contract ID: add Contract Descript

Apply this Contract to all lines.

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: Nicholas A Waddell +1 319 335 0541 nicholas-waddell@uiowa.edu
Contract ID: 0000000300000000000003664
Contract Descr: Computers/ipads
Contract Active: 03/01/2012 - 03/01/2013

Category ID: 47131901 **Category Descr:** Absorbent mats

If you skip the contract section and select a vendor with a contract, the system will ask you if you'd like use the contract. Click the Contract ID to apply or No, if the Contract Description doesn't apply to your order.

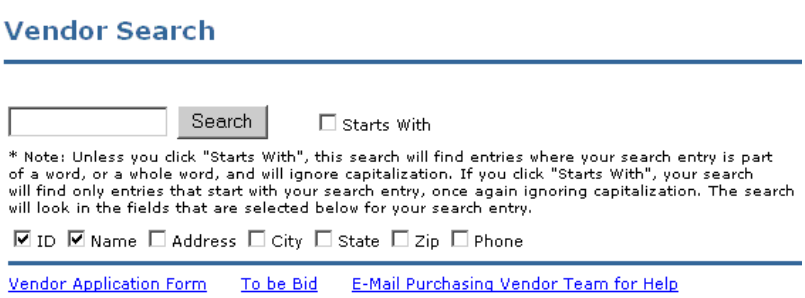
If you have questions, contact the Purchasing Agent.

Vendor Information

If you know the Vendor ID you can type it directly into the field. 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.

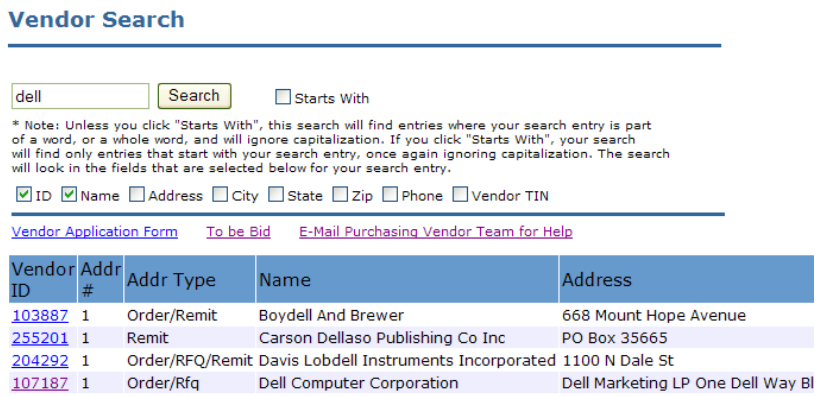
Type in the name you want to search for and click **Search**.

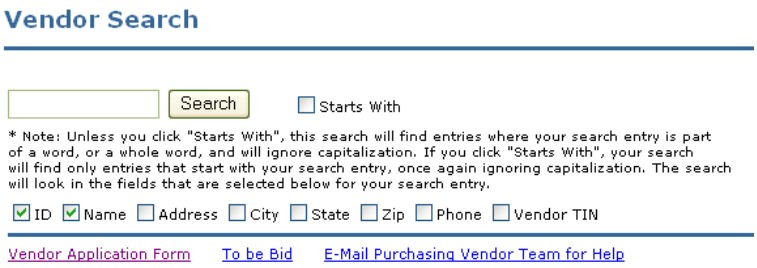


Select the vendor you want to use by clicking that Vendor ID link.

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.





To Be Bid link: 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.

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 add
Vendor Name: Test Tubes R Us

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

Address 1: 123 Brown St
Address 2: PO Box 456
Address 3:
City: Any Town State: IA Zip: 52240
Country: United States
Fax: 319/335-1234 Phone: 319/335-1235
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.

Employee Vendor Relationship

Conflict of Interest types of Relationships: If any one of the following applies to you plea

1. **Spouse/partner is employed by the vendor.** Employee means a paid employee of those persons is a partner or sole proprietor, as well as any corporation of which indirectly.
2. **Financial relationship with the vendor.** A financial relationship means a partner the faculty or staff member and another person. Examples are: Research Grants, co company, employment of an immediate family member in a company and/or other
3. **Personal relationship with the vendor employees or the vendor principals.** close that a reasonable person would believe that it would be difficult for a faculty o stranger.

Employee has a relationship to the selected vendor on this requisition.
Employee does not have a relationship to the selected vendor on this requisition.

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

Business Justification

Users will be required provide a business justification for the purchase. The justification should address the specific purpose of the purchase, who is being recognized for a reward or recognition, or any other pertinent details that will explain the public purpose of such a purchase.

Business Justification for This Purchase:

The Business justification will be required for all University purchases, regardless of the payment method.

#	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	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
990	17	3215	01000	54000600	0000	000	00000	00	0000			$0.00000

add
Add Line Item
Running Total: $ .00

The next section of the requisition is the line details. 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.

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

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
43212102	Dot matrix printers	JKEISER	6085
43212105	Laser printers	JKEISER	6085

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 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. Next, let's 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.

If you want to change all or some MFK elements, you can use the apply feature to your default MFK.

Apply this MFK to all lines.

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac
050	05	0310	00000	50649100	6070	000	00000	60	0000		

Type the numbers you wish to change and click **Apply this MFK to all lines**.

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

Reams of Paper

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

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
990	17	3215	01000	54000600	6070	000	00000	00	0000			$450.00000
050	05	0310	00000	50649100	6235	000	00000	60	0000			$300.00000

To delete the MFK line click ✕ next to the MFK Line you want to delete.

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

Reams of Paper

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

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
990	17	3215	01000	54000600	6070	000	00000	00	0000			$450.00000
050	05	0310	00000	50649100	6235	000	00000	60	0000			$300.00000

#	Act	Qty	UOM	Category	Price	Extension
2		1.0	Each	14000000	$ 0.00000	$ 0.00000

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

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
990	17	3215	01000	54000600	6070	000	00000	00	0000			$0.00000

Add Line Item

Running Total: $ 750.00

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 (6730, 6731 or 6740 Iact), 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. HawkID validation has been added to Asset Custodian. You may enter the HawkID of the custodian and tab to populate or use the Search functionality to search by HawkID or name.

#	Act	Qty	UOM	Category	Price	Extension
1		1.0	Each	43211500 add	$ 2750.00000	$ 2,750.00000

PC unit with guardrails

Vendor Item ID: 8015 add
Mfg ID: Apple
Mfg Item ID: M18015 add
Contract ID:

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	fn	cctr	slid	slac	mfk amt
990	17	3215	01000	54000600	6730	000	00000	00	0000			$2750.00000

add

Note: Asset information must be completed for Equipment Purchases (6730, 6731, or 6740). *Required fields.

*Bldg Abbr: PCO
*UI Room #: 202
*Description: Computer
*Asset Custodian (HawkID): Leichty, Christine L
*Custodian Dept/SDept: 021000003
Trade-In Tag #: n/a
Trade-In Allowance: n/a
Adjustments to Existing Tag #: add

General guidelines for this description field are:

First 30 characters should include the most details (Subject) of the item. Be specific.

Include any Vendor Item, Manufacture, or Manufacture IDs in the fields beside the description box.

Adding a Receiver

Any PReqs with IACT 6230, 6231, 6730, 6731 or 6740, ≥ $25K, ≥ $10K with IACT between 6200-6235, blanket orders (starting with B) and Contract Orders (starting with C) with IACT 6200-6235, 6730, 6731 or 6740 and Subagreement orders 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.

Receiver Information

Receivers add

Primary	Name	Hawk ID	Phone	Email	Department	Location	Remove
◉	Housel, Karen L	khousel	319/335-0409	karen-housel@uiowa.edu	ACCOUNTS PAYABLE & TRAVEL	202 PCO	✕
○	Hyche, Denise A	dhyche	319/335-3816	denise-hyche@uiowa.edu	ACCOUNTS PAYABLE & TRAVEL	202 PCO	✕

Available Receivers

Adam, Michael J
Davis, Doralee G
Kinney, Joshua
O'Brien, Benjamin T
Singleman, Kevin H

<- Add Selected

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.

The Receiver(s) 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

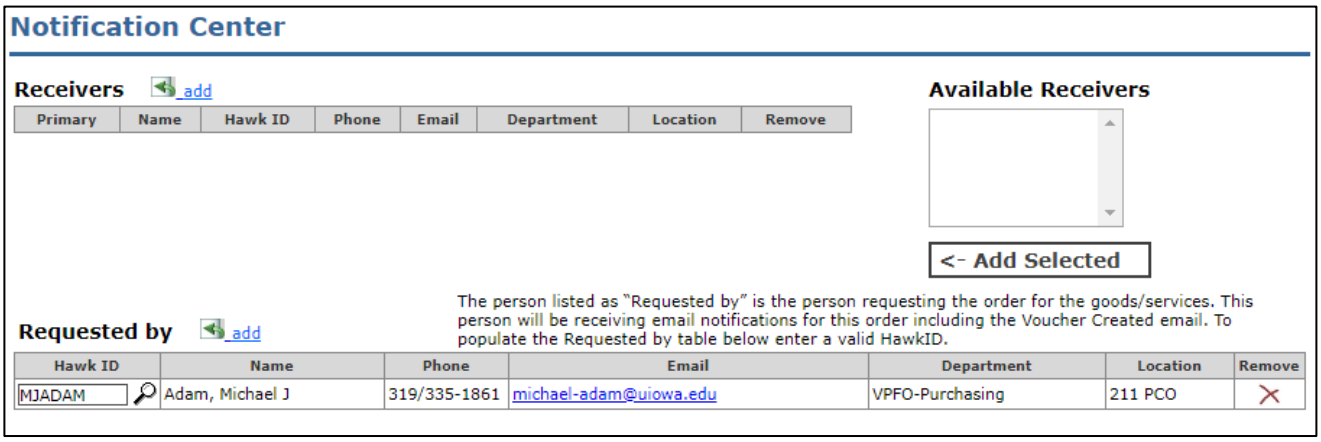
Direct receiving questions/suggestions to preqs@uiowa.edu.

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

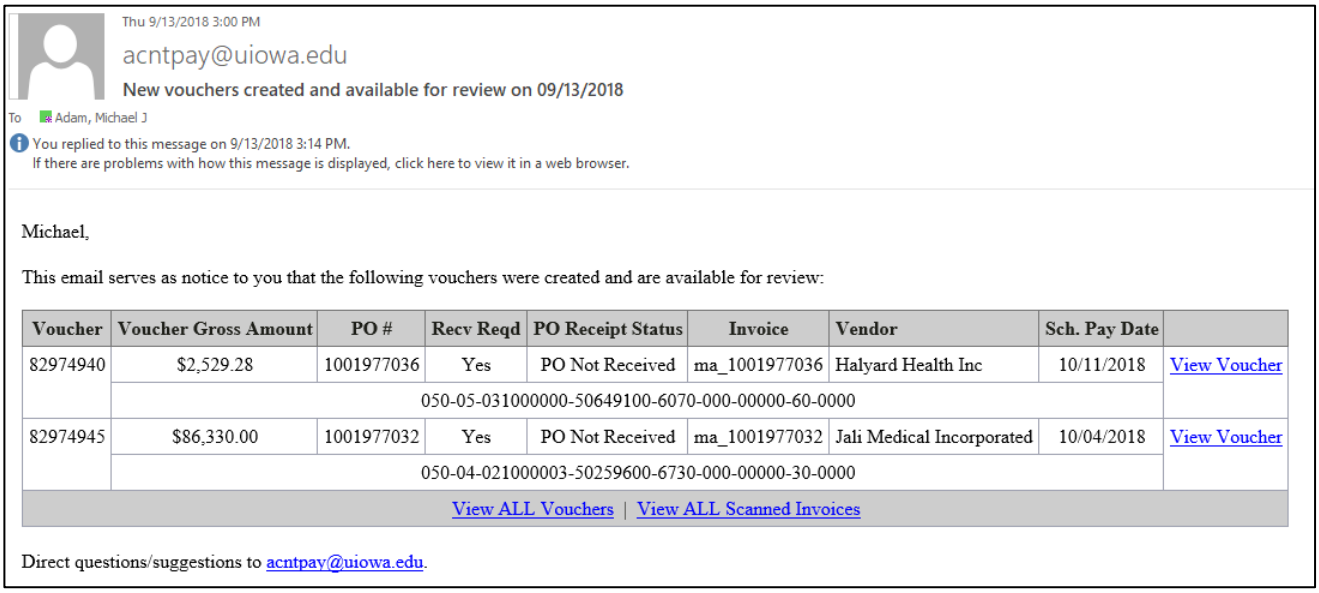
Adding Requested by

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.

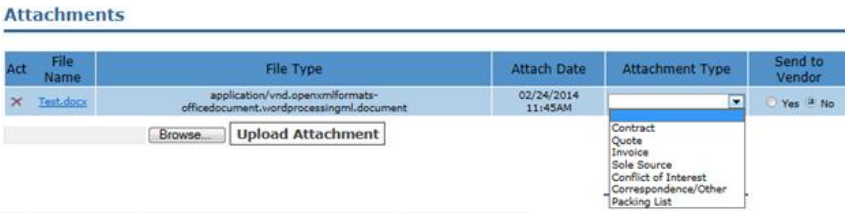


Voucher Created Email example.



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** (Contract, Quote, Invoice, Sole Source, Conflict of Interest, Correspondence/Other or Packing List) from the drop down menu and select if it should be Sent to the Vendor or not. Click ✕ if the Attachment needs to be removed.



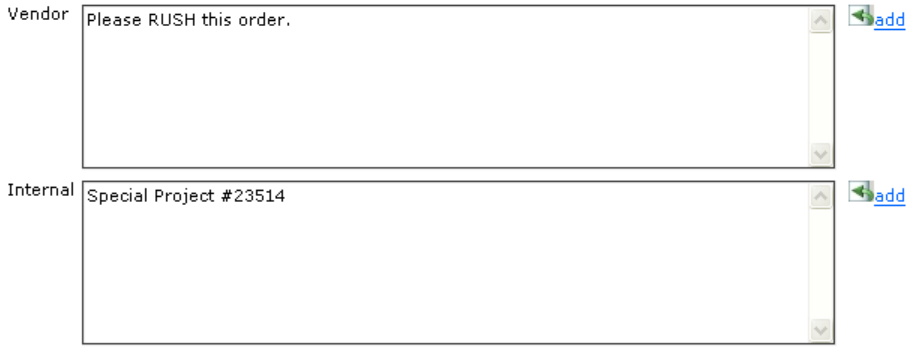
Act	File Name	File Type	Attach Date	Attachment Type	Send to Vendor
✕	MonthlyCreditLimit.pdf	application/pdf	05/20/2010 10:27AM	Quote	Yes No
✕	UIVAF.doc	application/msword	05/20/2010 10:28AM	Sole Source	No
✕	National_Belgium.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet	05/20/2010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

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



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.

Finalize Requisition

○ 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. 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 be completed if the purchase is $50K 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 https://opsmanual.uiowa.edu/administrative-financial-and-facilities-policies/purchasing#11.10.

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

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.

Change History on a PReq

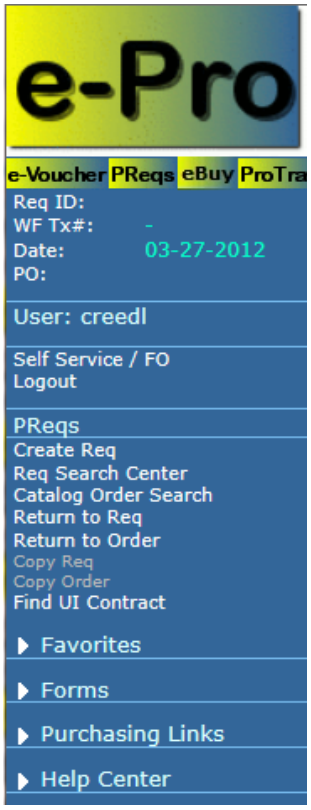
Once the Requisition is Inside Workflow, the Workflow path will be displayed. Each time a change is made to the PReq after it is sent to Workflow, the system logs the change.

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.

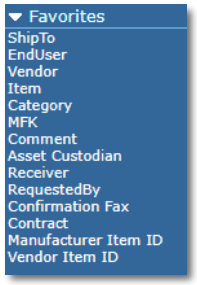
Order (catalog) Search Center: Located on the sidebar, click on Search Center to find Catalog Orders. Granted by workflow administrator.

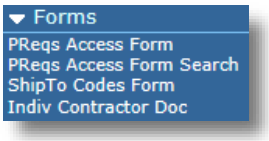
Return to Order: Takes the user to the main Order entry page.

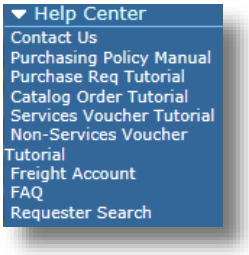
Copy Req: Brings up an established Req you would like copied. Click Copy Req on the side bar. The information from the Req will be populated in a new record. Make any changes needed and send to workflow.

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 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: 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

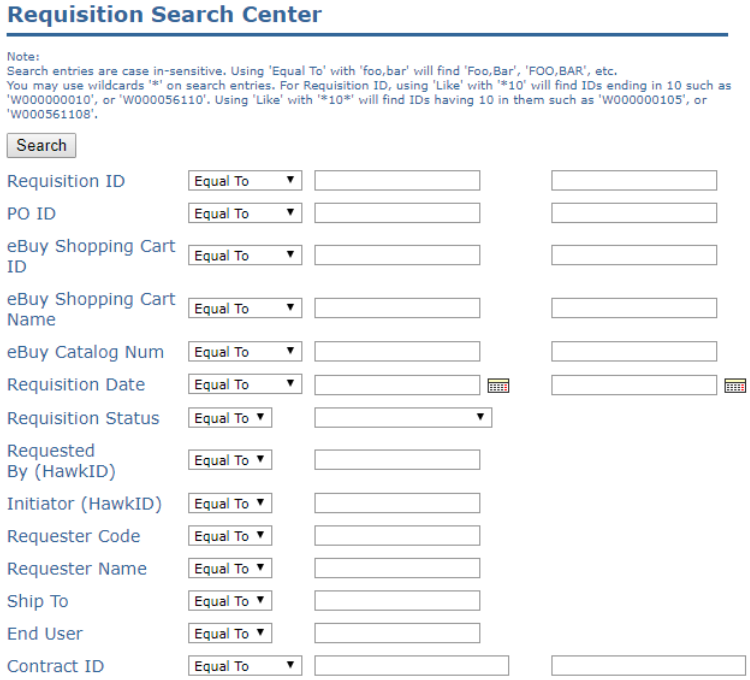
Services Voucher Tutorial: Document for help with services e-vouchers (payroll)

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



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.

PReq Guidelines

On requisitions less than $25,000.00 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 Department will send a 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 or in the Vendor Comments 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 $25,000.00.

The PReqs system will not allow zero dollar amount requisitions.

For low dollar (under $10,000) **goods and services** orders should use the following tools in the order listed**.**

1. PCard - These orders are reviewed and audited 100%. The charges can be disputed
2. PReqs - If PCard can't be used or if the department does not have a pcard, recommend PReqs. Purchase orders are issues with University terms and conditions that are meant to protect the University.
3. eVouchers are appropriate for subscriptions, memberships, hotel deposits, refunds, reimbursements, third party payments, Transfer of funds, travel registration, travel, utilities, research subjects, pre-payments under $3000 and food and alcohol.

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 www.research.uiowa.edu/dsp/ 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.

Procedures for Initiators to Follow for Non-eBuy Orders $25,000 and Over:

The PO number for orders $25,000 and over is assigned after the last Purchasing Department approval in Workflow. This will typically be the Purchasing Agent. However, orders $100,000 and over also require approval from the Director of Purchasing.

Rush or emergency purchase order numbers for orders $25,000 and over must be obtained from the Purchasing Agent. Departments with emergencies will be required to enter a Requisition in the PReq system and let Purchasing know it is an emergency. Then they must send the Requisition through Workflow with all required signatures. Once it gets to the Purchasing Agent, the PO number will be assigned and you will be able to view it on the system.

Paid by PCard: Purchasing Agents can pay PReqs by their Procurement Card. The PCard limits are set higher and POs are sent the usual way to the vendor.