



Coding an Asset in eProcurement

Navigation:

eProcurement > Requisition

Procedure:

Chose the Requisition Type: Requisition, ITD-10 or TSR Equipment

The Requisition type determines the workflow routing. The end result of an approved requisition will be a Purchase Order dispatched to the vendor with all required approvals accomplished within the eProcurement process.

- ❖ A Requester, Multi-Requester or TSR Requester can create an eProcurement requisition with an asset.

1.

Define Requisition page displays –

- Name the Requisition,
- Go to the **Line Defaults** and enter the **Supplier, Buyer, Category & Unit of Measure**
- Go to the **Accounting Defaults** and enter the **Account code, Fund, Program, SID, PC Bus Unit & Project** (**Make sure to change the location code to a valid asset location.**)

Define Requisition

Business Unit: DOCM1 Dept. of Correction Requisition Name: Creating an Asset
*Requester: JonesKa DOC-Jones Kane Priority: Medium
*Currency: USD Requisition Type: Requisition
Obligation Amount

Default Options
 Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
 Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults
Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.
Supplier: 0000064731 Category: 44000000
Supplier Location: MAIN Unit of Measure: EA
Buyer: JonesKa

Shipping Defaults
Ship To: 1590000043 Add One Time Address
Due Date: Attention:

Distribution Defaults
SpeedChart:

Accounting Defaults

| Dist | Percent | Location | GL Unit | Account | Fund | Dept | Program | SID | Bud Ref | PC Bus Unit | Project |
|------|---------|----------|---------|---------|-------|----------|---------|-------|---------|-------------|----------------|
| 1 | | ACORE | STATE | 54150 | 11000 | DOC89201 | 00000 | 10020 | | NONPC | DOC_NONPROJECT |

OK Cancel

Make sure to change the location ACORE to a valid Asset Location.



2.

- Click on the **Asset Information Tab** and enter the **AM Business Unit** and **Profile ID**. Information entered in the **Line Defaults** group box applies to all lines of the requisition.
- Click **OK**

3.

- Create Requisition page displays



4.

- Click on **Special Request** and enter the **Item Description, Price, Quantity**
- Click on **Add to Cart**.

Create Requisition [?](#)

Welcome DOC-Jones Karie [Home](#) [0 Lines](#) [Checkout](#)

Request Options

All Request Options
Catalog

Special Requests
ePro Services
Fixed Cost Service
Time and Materials
Variable Cost Service
Templates
Favorites

Special Requests [?](#)

Enter information about the non-catalog item you would like to order.

Item Details

*Item Description

*Price *Currency

*Quantity *Unit of Measure

*Category Due Date

Supplier

Supplier ID

Supplier Name EPLUS TECHNOLOGY INC [Suggest New Supplier](#)

Supplier Item ID

Manufacturer

Mfg ID

Manufacturer
Mfg Item ID

Additional Information

Send to Supplier Show at Receipt Show at Voucher

[Add to Cart](#) [Cancel](#)



5. The Shopping Cart will Display with the items added. It can be moved anywhere on your screen.

- Click on **Checkout**

[Print](#) | [New Window](#) | [Help](#) | [Personalize Page](#) |

Shopping Cart ✕

| Description | Qty | UOM |
|-------------|-----|-----|
| Equipment | 2 | EA |

Total Lines 1
Total Amount (USD) 10,000.00



6.

The Checkout – **Review and Submit** page displays

- Click on the arrow at the beginning of the line.

Checkout - Review and Submit
 Review the item information and submit the req for approval.

Requisition Summary

Business Unit: Dept. of Correction Requisition Name:
 *Requester: DOC-Jones Karie Priority:
 *Currency: Requisition Type:
 Dispatch Method: Obligation Amount:

Cart Summary: Total Amount 10,000.00 USD
 Expand lines to review shipping and accounting details Add More Items

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|------|-------------|---------|----------------------|--------------------------------|------|---------|----------|---------|-------------------------------|----------------------|
| 1 | Equipment | | EPLUS TECHNOLOGY INC | <input type="text" value="2"/> | Each | 5000.00 | 10000.00 | | <input type="text" value=""/> | <input type="text"/> |

Select All / Deselect All Select lines to:

Total Amount 10,000.00 USD

Shipping Summary

Ship To Location:
 Address: 24 Wolcott Hill Road
 Central Office
 Central Receiving
 Wethersfield, CT 06109
 Attention To: DOC-Jones Karie
 Comments:

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher Add more Comments and Attachments

Approval Justification

Enter approval justification for this requisition

7.

- Click the arrow in front of the Accounting Lines

Checkout - Review and Submit
 Review the item information and submit the req for approval.

Requisition Summary

Business Unit: Dept. of Correction Requisition Name:
 *Requester: DOC-Jones Karie Priority:
 *Currency: Requisition Type:
 Dispatch Method: Obligation Amount:

Cart Summary: Total Amount 10,000.00 USD
 Expand lines to review shipping and accounting details Add More Items

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|------------------|-------------|------------------|---|--------------------------------|----------|--------------------------------|----------|---|-------------------------------|----------------------|
| 1 | Equipment | | EPLUS TECHNOLOGY INC | <input type="text" value="2"/> | Each | 5000.00 | 10000.00 | | <input type="text" value=""/> | <input type="text"/> |
| Shipping Line: 1 | | *Ship To | <input type="text" value="159000043"/> | Add Ship to Comments | Quantity | <input type="text" value="2"/> | | | | |
| | | Address | 24 Wolcott Hill Road Central Office Central Receiving Wethersfield, CT 06109 | Add One Time Address | Price | 5000.00 | | Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields | | |
| | | Attention To | <input type="text" value="DOC-Jones Karie"/> | | | | | | | |
| | | Due Date | <input type="text"/> | | | | | | | |
| | | Accounting Lines | <input type="text"/> | | | | | | | |

Select All / Deselect All Select lines to:

Total Amount 10,000.00 USD

Shipping Summary



8. The Chartfields will display.

The screenshot shows the 'Accounting Lines' interface. At the top, there are dropdowns for '*Distribute By' (set to 'Qty') and 'SpeedChart'. Below this is a tabbed interface with tabs for 'Chartfields1', 'Chartfields2', 'Chartfields3', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The 'Chartfields1' tab is active, displaying a table with the following data:

| Line | Status | Dist Type | *Location | Quantity | Percent | Merchandise Amt | GL Unit | Entry Event |
|------|--------|-----------|-----------|----------|----------|-----------------|---------|-------------|
| 1 | Open | | ACORE | 2 | 100.0000 | 10,000.00 | STATE | |

Below the table are buttons for 'Add to Favorites', 'Add to Template(s)', 'Delete Selected', and 'Mass Change'. At the bottom right, it shows 'Total Amount 10,000.00 USD'.

9.

- Click on the Asset Information Tab

AM Business Unit and **Profile ID** were carried forward to the line.

The screenshot shows the 'Accounting Lines' interface with the 'Asset Information' tab selected. The table below shows the following data:

| AM Business Unit | Profile ID | Tag Number | CAP # | Sequence | Empl ID |
|------------------|------------|------------|-------|----------|---------|
| DOCM1 | 1EQUIPMENT | | | | |

10. Go to the Line Details page to enter Purchasing Authority and Contract information.

- Click the **Line Details** button.



11.

The **Purchasing Authority** defaults to Contracts.

- Enter a Contract ID if using this Purchasing Authority.
- Click OK

Line Details

Line Details ?

No Image Line 19⁰⁰ Equipment Line Status Open

▼ Item Details ?

Merchandise Amount 10000.00 USD
Item ID
Category 44000000
Original Substituted Item Description
Physical Nature Goods
Buyer JonesKa
Buyer Information
Configuration Info

RFQ Required
Device Tracking
Zero Price Indicator
Stockless Item
Amount Only
Inspection Required

▼ Contract Information ?

Use Contract if Available
Contract ID 12PSXD308AB
Contract Details
Version 2
Contract Line
Category Line

▼ Supplier Information ?

Supplier ID 0000084731 EPLUS TECHNOLOGY INC
Supplier Location MAIN ORDER & REMIT-CHECKS
Suggest New Supplier
Supplier Item ID
Supplier's Catalog

▼ Manufacturer Information ?

Manufacturer ID
Manufacturer
Manufacturer's Item ID
GTIN

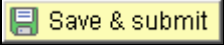
▼ Sourcing Controls ?

Consolidate with other Reqs
 Calculate Price
 Override Suggested Supplier
 Inventory Source Flag

▼ State of CT Custom Fields ?

Purchasing Authority Contracts



| | |
|-----|--|
| 12. | Select Save & submit to save the requisition and begin the Approval Workflow process. Selecting Save for Later will save the requisition, but not initiate the Approval Workflow process. <ul style="list-style-type: none"> Click the Save & submit button.  |
| 13. | The Confirmation page displays. |

Requisition Approver’s Query: Ensures all Asset information was entered correctly.
 (The Query name will be sent out in a Daily Mail when completed.)

Requisition Amount, Budget and Purchasing Approvers will have access to run the Query from the Buyers Work Center to identify any requisition line in pending status that:

- Has an Asset Account Code and no Asset BU or Profile ID or
- Has an Asset BU and no Asset Account code or Profile ID

Asset Account Codes:

55820, 54150, 55830, 55840, 55850, 55860, 55870, 55880, 55890,
 55420, 55430, 55450, 55470, 55480, 55490, 55500, 55510, 55520, 55530,
 55540, 55610, 55620, 55630, 55640, 55650, 55660, 55670, 55680, 55690,
 55700, 55710, 55720, 55730, 55810, 55440, 55460, 53755, 54150,