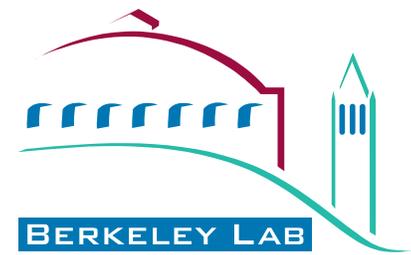
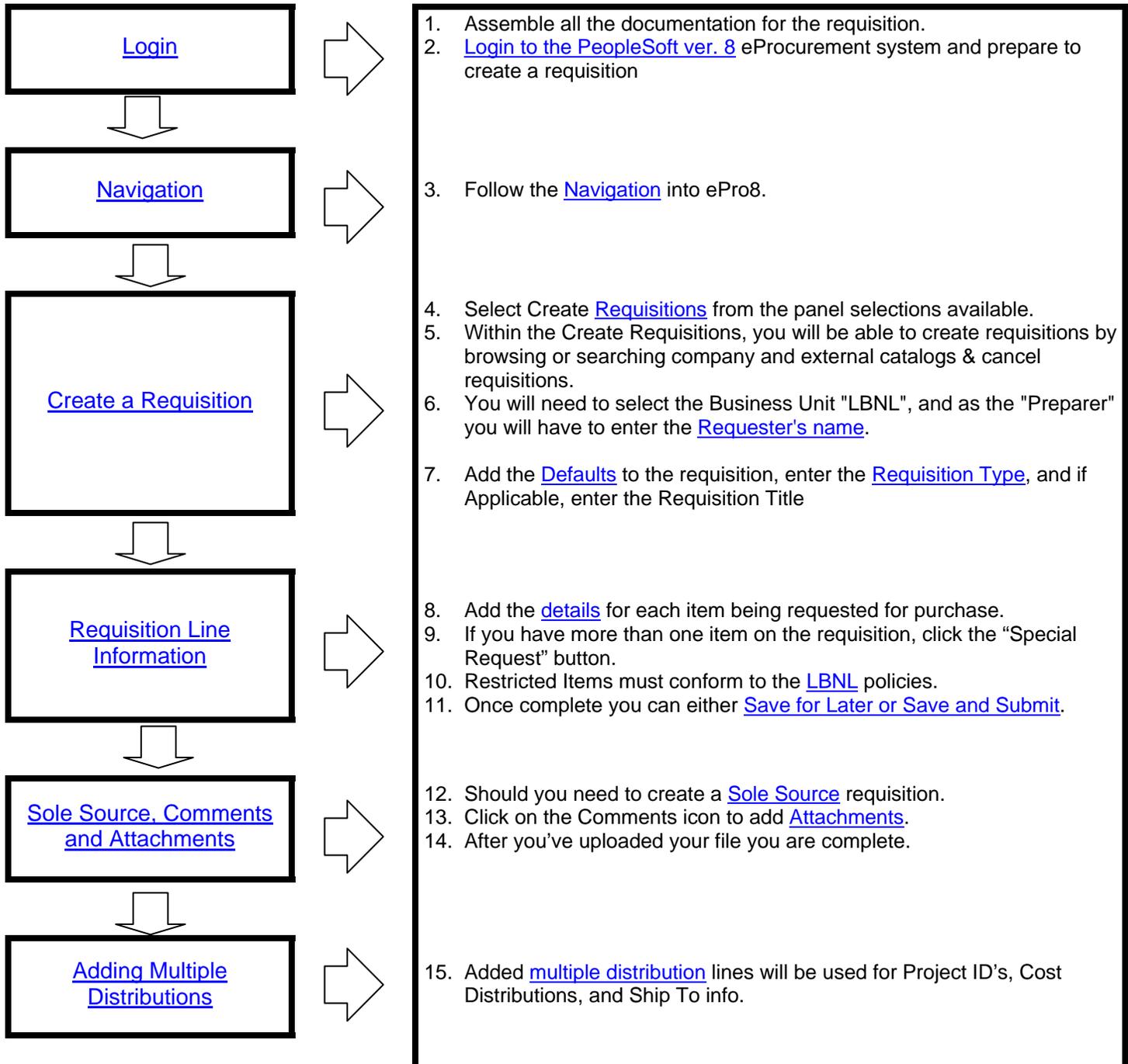


# How Do I Create a Requisition?



This instruction provides Requisition Preparers with an introduction to the PeopleSoft eProcurement 8 system. Requisitions will be entered as shown below and later assigned to Purchase Orders by buyers.



# How Do I Create a Requisition?

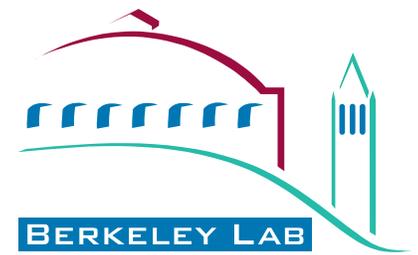


## Step 1: Login

- ❖ Launch Internet Explorer (IE)
  - Log into eProcurement 8 via the link of **epro/eproprd** for production (or **epro/eprotrn** for the training database).
  - *Note: If your workstation is not set up with Internet Explorer contact the Help Desk (4357).*
- Enter your login name (UPPERCASE only)
- Enter your password

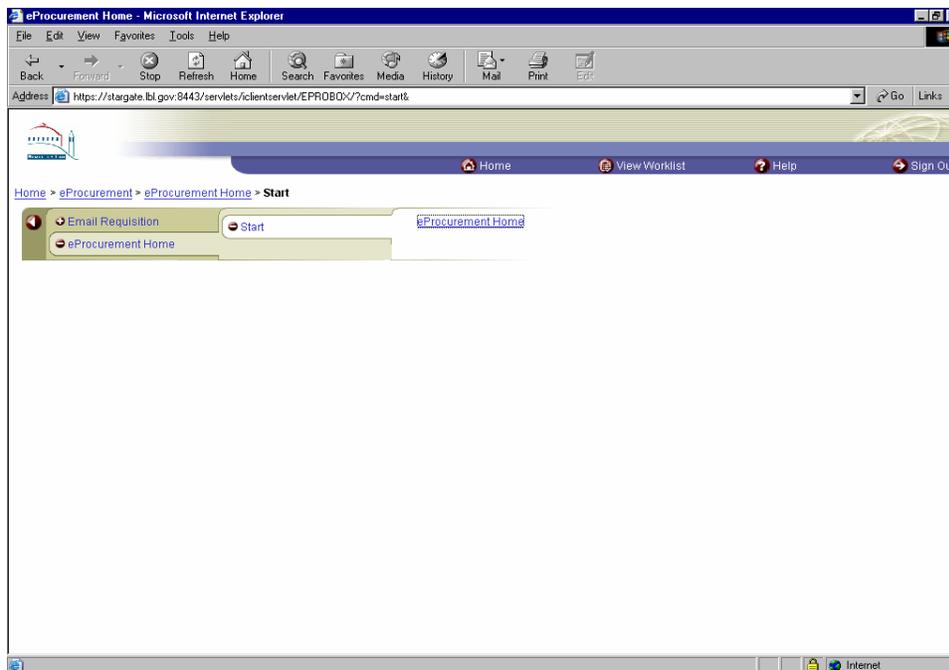


# How Do I Create a Requisition?



## Step 2: Navigation

- ⇒ eProcurement
- ⇒ eProcurement Home
- ⇒ Start
- ⇒ eProcurement Home

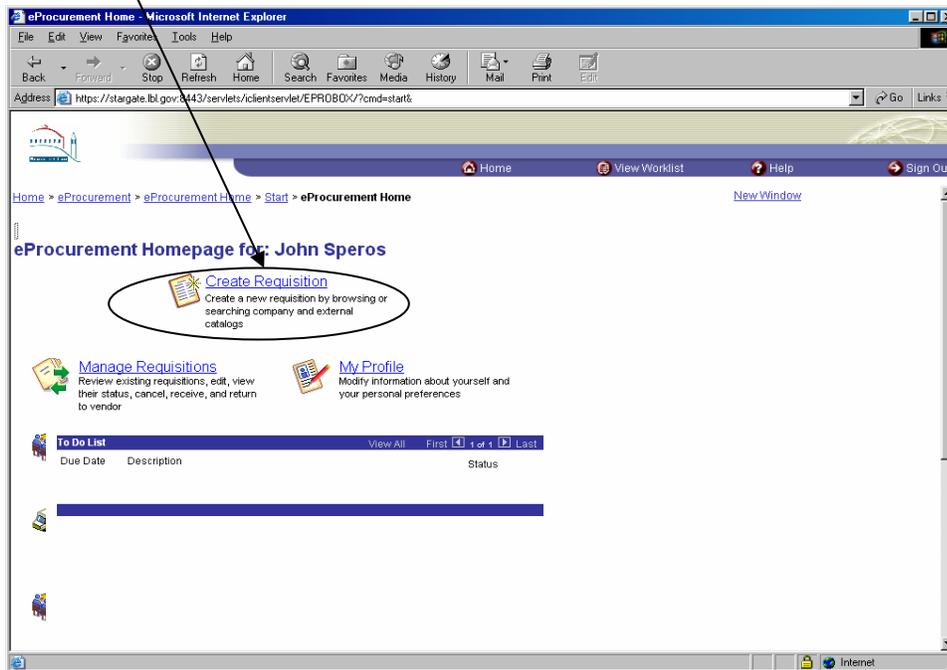


# How Do I Create a Requisition?

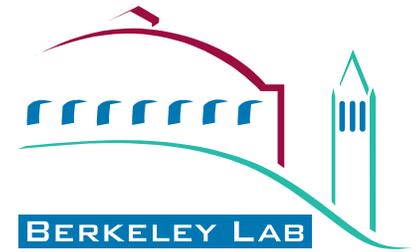


## Step 3: Select Function

⇒ Click “Create Requisition”

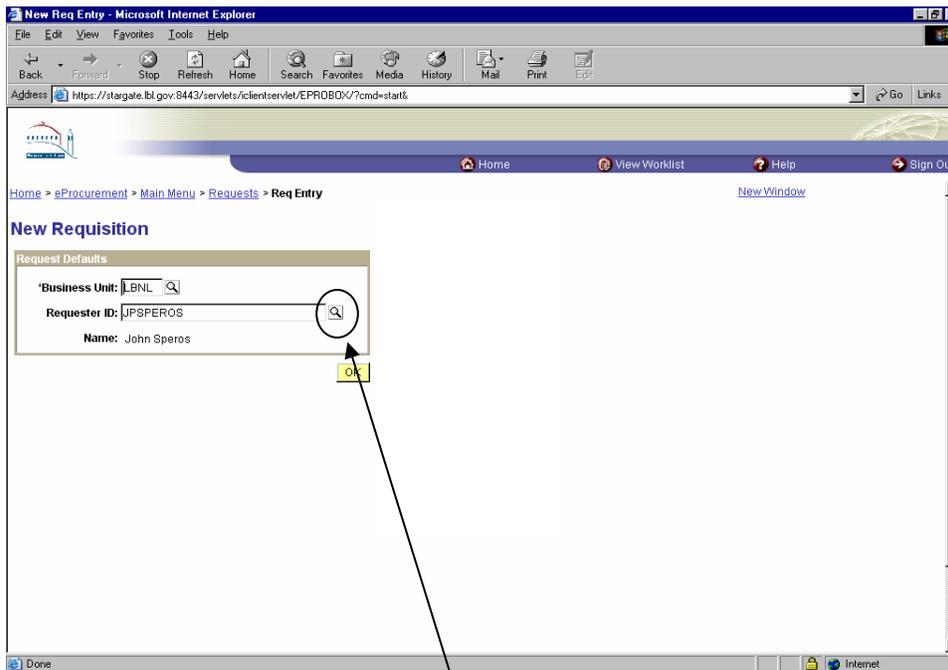


# How Do I Create a Requisition?



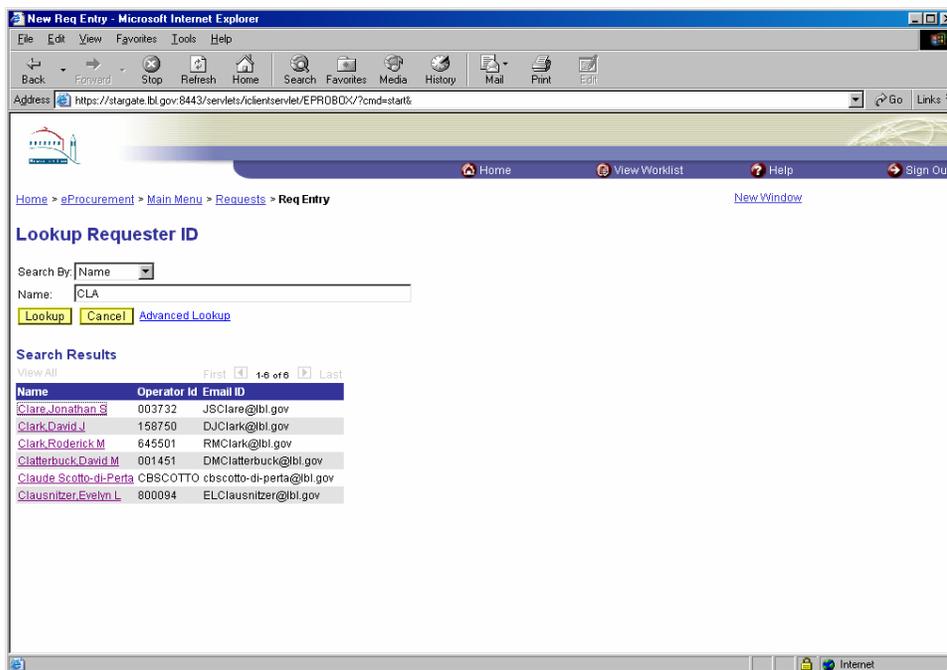
## Step 4: Enter the Requester

- If **LBNL** is not defaulted in as the Business Unit then enter **LBNL**.
- Verify that the **Requester ID** is correct (from your operator defaults)
- Click on the **OK** button



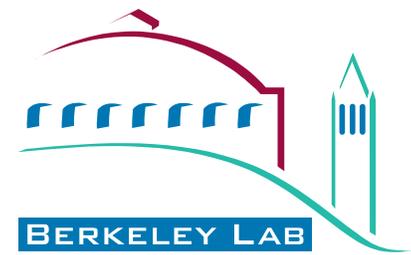
- Click the **Requester ID** lookup  icon to find the specific requester's name. The Lookup Requester ID panel will be displayed.

# How Do I Create a Requisition?



- In the **Search By** field, change the value to “Name”.
- In the **Name** box, enter the beginning of the requester’s last name and click the **Lookup** button. All requesters matching the name you entered will be returned.
- Select the requester you want by clicking on the link. The value will appear on the previous “New Requisition” page.

# How Do I Create a Requisition?



## Step 5: Enter the Requisition Defaults

- Click the **Vendor Lookup** link to select a vendor or leave the vendor blank and have the buyer choose one.
  - If a vendor's name is not listed, type in the vendor's Name, Phone Number, and Contact in Line 1's **Comments** section (see below).
- Leave the **PCard Suggested** box checked unless the items are over \$5,000, restricted, or will be on an Extended Term (blanket) order.
- Leave the **Buyer** box blank unless you have been working with a buyer and the buyer instructed you to enter their name. You can select a buyer by clicking on the  next to the buyer name, clicking the Lookup button, and clicking on the applicable buyer's name.
- Verify that the **Ship To** address & **Location** are correct. (Location is taken from the Requester defaults). If you want to change these, click the **Override** button and select the appropriate values using the  icon. Laboratory locations must have 3-digit building numbers. (Do **not** uncheck the **Override Suggested Vendor** box.)
- Enter the **Due Date** when you need your items
- Enter an **Approver** from your division with enough dollar authority to approve the requisition. (See the IRIS "Authorized Signers" page.) The Approver is entered similarly to the Requester in Step 4 above.

Requisitions - Microsoft Internet Explorer

Address: <http://eprosrv.lbl.gov:8000/servlets/iclientservlet/EPROTRN?cmd=start&>

Home Worklist Help Sign Out

### Requisition Defaults

Default  Override

Override Suggested Vendor  
 Consolidate with other Reqs

**Item Details**

Vendor:  

[Vendor Lookup](#)

PCard Suggested

Buyer:   [One Time Address](#)

Ship To:  LBNL MAIN RECEIVING

Location:  Enclosed Office

Due Date:  

Approver:  

**Extended Term Details**

Extended Term Agreement

Certifier:  Cert Type:

Begin Date:  End Date:  Prev PO:

**Chartfield Defaults**

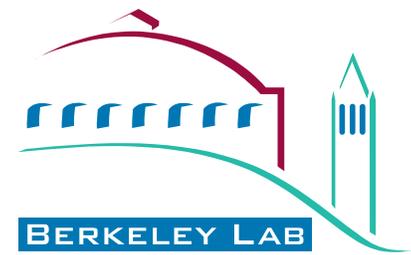
GL Unit: LBNL

Project ID:   [Project ID](#)

Cancel OK

Done Local Intranet

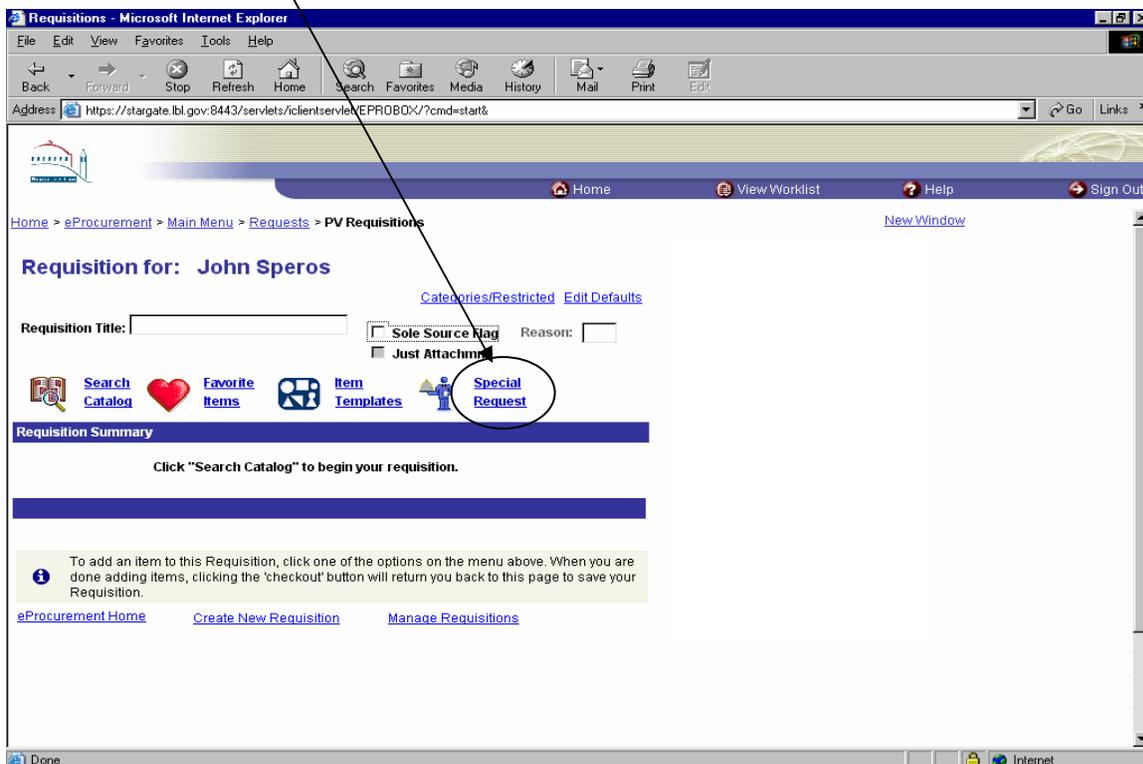
# How Do I Create a Requisition?



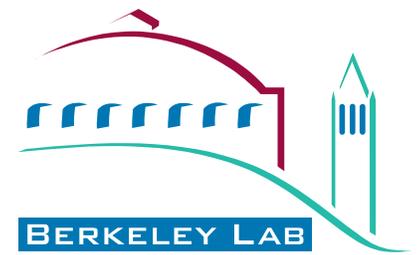
- If this requisition is for a new Extended Term Agreement (blanket order), *uncheck* the **PCard Suggested** box and *check* the **Extended Term Agreement** box. (If the requisition will be used to change an existing Extended Term agreement, enter the below information in Line 1's **Comments** box and do not enter the information on the Requisition Defaults page.)
  - Select a **Certifier** who will be responsible for approving invoices. A Certifier is entered similarly to the Requester name in Step 4 above.
  - Enter a **Begin Date** and **End Date**.
  - Enter a previous PO number in the **Prev PO** box if this replaces an existing Extended Term Agreement.
  - Select a **Cert Type** to indicate how invoices should be handled.
- Enter the default **Project ID** for the requisition.
- Click the **OK** button

## Step 6: Enter the Requisition Type

- Click on the **Special Request** link each time you want to add a new line to the requisition. Enter a requisition line for each item that you expect to be independently received or invoiced. (We only use Special Request now.)

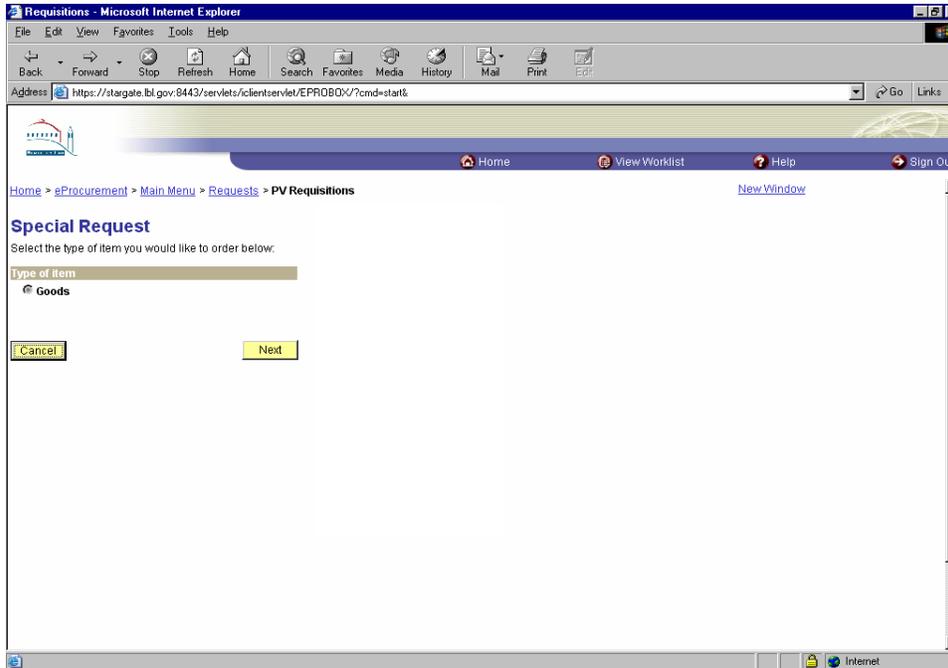


# How Do I Create a Requisition?

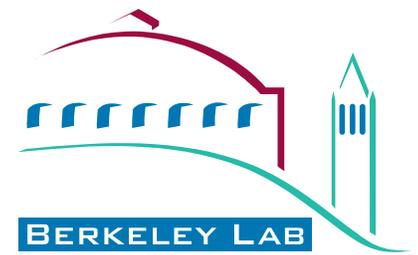


## Enter the Special Request Type

- Click the **Next** button



# How Do I Create a Requisition?

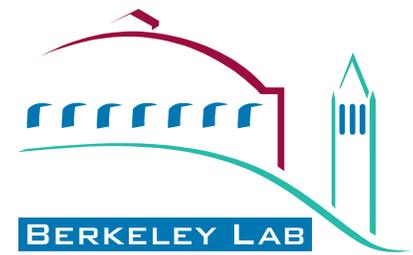


## Step 7: Enter the Requisition Details

- Enter a **Description** of the item or service being requested. (Do not just say “See attached quote.”) Try to use the first 40 characters to describe your requirement since only those are sent to the PCard system and are available for Receiving. The **Description** box holds 254 characters. Additional characters will be truncated. If you need more space to describe your requirement, use the **Comment Text** box.
- Enter a quantity (**Qty**) and unit price (**Price**). For Extended-Term requisitions, enter the total dollar amount for the line in **Qty** and enter a **Price** of \$1.00 to enable Accounts Payable to pay multiple invoices for the line.
- Select a **Unit of Measure** (usually use “Each”).
- Select the **Category** that best applies to the item. Use the [Categories/Restricted](#) link for a description of categories and their requirements. (See Step 8 below for details on restricted categories.)
- **Due Date** will default from the defaults panel. You can change it for a particular item.
- Enter any **Comments Text** (if applicable) within this area up to 2001 characters. Use this as an overflow for the description field which is limited to 254 characters. Include the suggested vendor previously mentioned.
- As the Preparer, you can check who will have access to the **Comment Text**.
- Click on the **Add Item** button.

The screenshot shows a web browser window titled "Requisitions - Microsoft Internet Explorer". The address bar shows the URL: <https://stargate.lbl.gov:8443/servlets/iclientervlet/EPROBOX?cmd=start&>. The page content includes a navigation menu with "Home", "View Worklist", "Help", and "Sign Out". The main heading is "Special Request - Goods". Below this, there is a "Description:" field with a dropdown menu showing "WORKSTATIONS". To the right of the description field is a link for "Categories/Restricted". Below the description field are four input fields: "Qty:" with the value "5", "Price:" with the value "150", "Unit of Measure:" with a dropdown menu showing "Each", and "Category:" with a dropdown menu showing "Computer Hardware". Below these fields are "Vendor ID:" with a link for "Vendor Lookup" and "Due Date:" with the value "05/15/2002" and a calendar icon. Below the vendor and due date fields is a "Comment Text:" field with the placeholder text "COMMENTS ARE HERE". At the bottom of the form are several buttons: "Cancel", "Send to Vendor" (checked), "Shown at Voucher" (checked), "Shown at Receipt" (checked), and "Add Item". A red circle highlights the "Add Item" button.

# How Do I Create a Requisition?

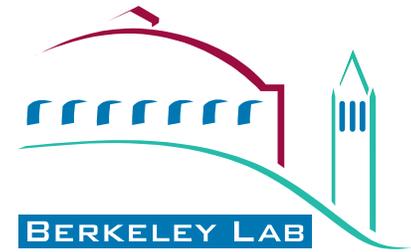


## Step 8: Restricted Items Purchases

- The Laboratory is prohibited by its Prime Contract with DOE from purchasing certain items with Government funds. Other items require special internal approvals or safety measures before purchasing them. By selecting an EH&S Restricted Item category from the list, the item will be routed to EH&S for approval or an email notification. A pop-up window will warn the user when the item Category is an EH&S Restricted item.
  - LBNL maintains the *Restricted Item List* which can be viewed on the Procurement Web site at <http://procurement.lbl.gov/restrict.htm>.
  - The chemicals and materials on the list are either dangerous to people or harmful to the environment and are regulated by Federal, DOE, State, or LBNL.
  - These items are restricted but not prohibited from being purchased. The Laboratory needs to ensure that the proper controls and authorizations are in place before the items are purchased. This is a Line Management responsibility.
  - EH&S should be consulted before purchasing restricted items.
  - Some substances/equipment require approval before purchase.
  - The requisition should contain all contact names and phone numbers to call in any case.
  - When you submit a requisition for a Restricted Item, you are acknowledging that you have followed the rules regarding its purchase.

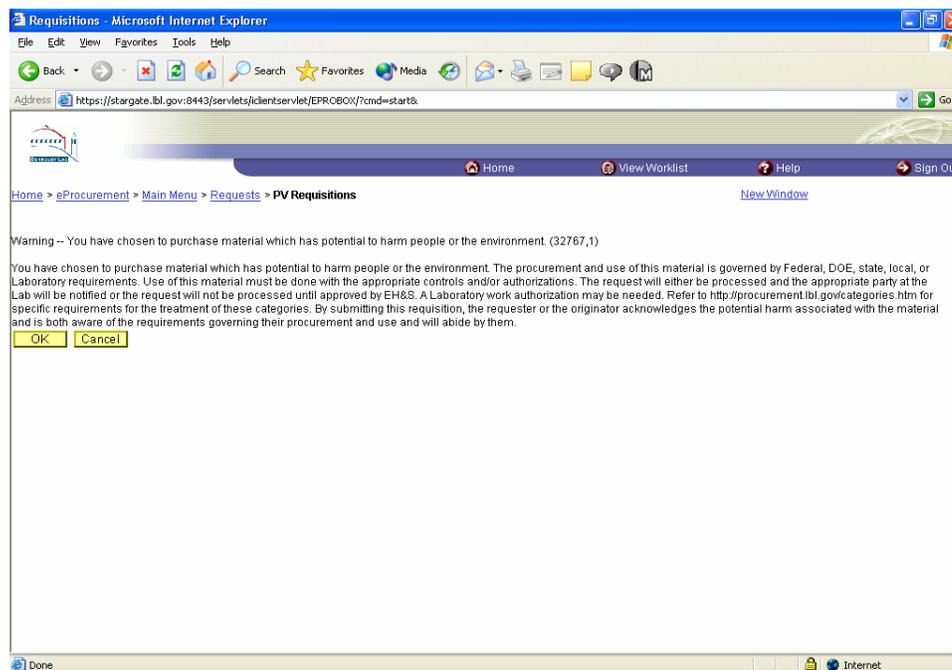
A link to the [Categories](#) page appears in each ePro requisition line and on the Requisition Summary page. Items on the Categories page in red may pose environmental, health, or safety risks and require special notifications/approvals and precautions. The eProcurement Categories page indicates which categories require EH&S approval and which ones require EH&S notification. The Categories page provides item Category definitions, whether or not an item is restricted, and applicable contact names (see example below).

# How Do I Create a Requisition?



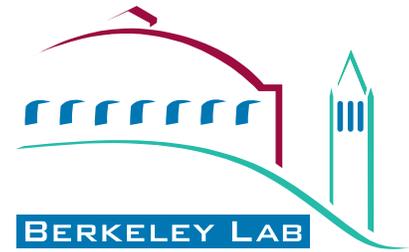
Category Description	Short Name (PeopleSoft)	Links for further information	Contact for further Notification	Authorization Note
Architect-Engineer Services	Arch-Engr			
Biological Agents	Bio-Agent	<a href="#">Restricted Item List</a> <a href="#">Biosafety Plan</a> <a href="#">Pub 3000 Chpt 6</a>	Paul Blodgett	Biological Use Authorization (Institutional Biosafety Committee)
Biosafety Cabinets	Bio-Cabint	<a href="#">Restricted Item List</a> <a href="#">Biosafety Plan</a>	Paul Blodgett	
Building Materials	Bldg-Matrl			
Chemical Storage Cabinet	Chem-Cabint	<a href="#">Restricted Item List</a> <a href="#">Chemical Hygiene Plan</a>	Larry McLouth	
Chemicals, Non-Restricted	Chem-Non-R			
Chemicals, Restricted	Chem-Rstr	<a href="#">Restricted Item List</a> <a href="#">Peroxide Forming Chemical List</a> <a href="#">Chemical Hygiene Plan</a> <a href="#">Pub 3000 Chpt 6</a>	Larry McLouth	Activity Hazard Document
Clothing	Clothing			
Computer CPU	Comp-CPU			

When the user saves the requisition, they will receive a warning pop-up panel showing that they've selected a restricted item.



The Preparer must acknowledge the receipt of this warning by clicking on the OK button. Once accepted, the requisition will be saved and a requisition number will be assigned. When the requisition is submitted, EH&S will either be notified via email or be required to approve the request before the request is sent to Procurement.

# How Do I Create a Requisition?



## Step 9: Save for Later or Submit Requisition

- When you finished with the requisition, you can either **Save and Submit** the requisition for approval and further processing or **Save for Later**. The **Save for Later** function allows you to save the requisition and get a requisition number. You can then lookup the requisition number and edit it a future time. **Save for Later** does not send the requisition to the approver but lets you continue to work on it at a later time.
- Here is the requisition number:

Save for Later

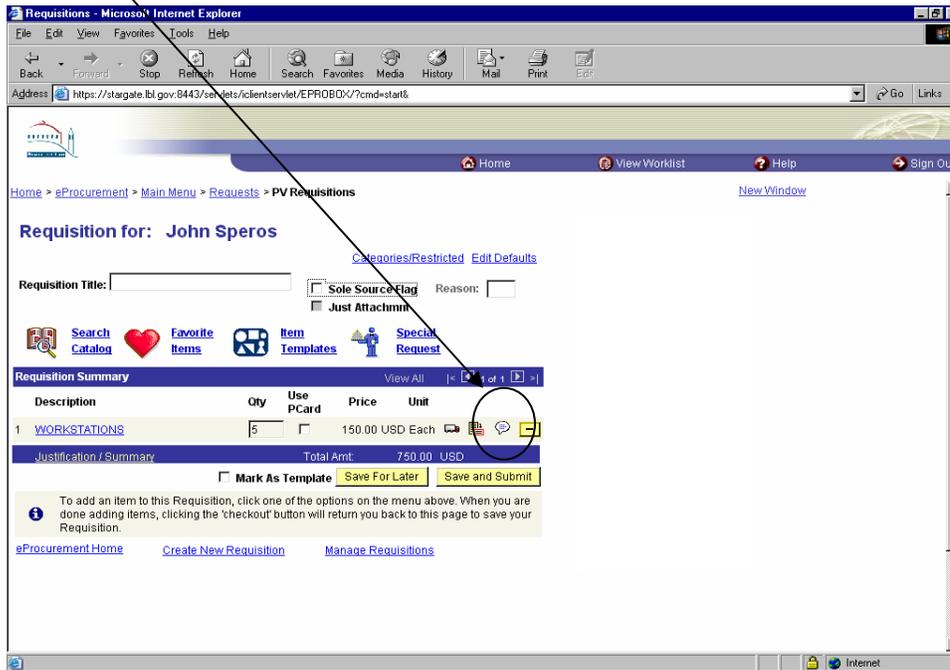
Save and Submit

# How Do I Create a Requisition?



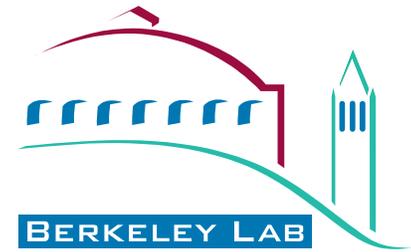
## Step 9: Requisition Summary Page

- Once you've reached this panel, you have the option of clicking the **Save and Submit** button to complete the requisition. Should there be a requirement to add file attachments you will need to click on the **Comments** icon.



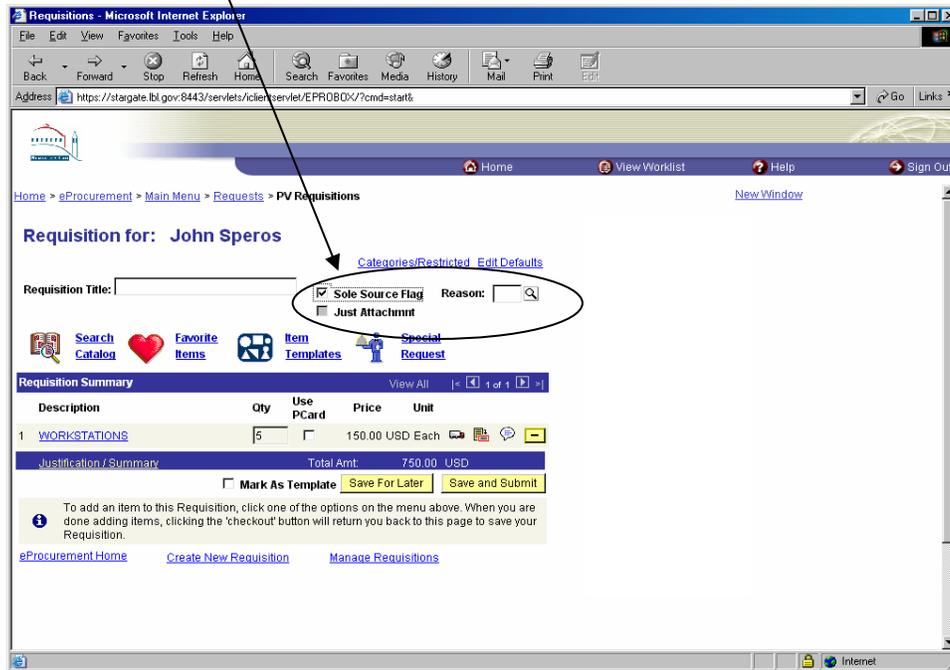
	Use this Icon to edit/update the delivery schedule details and project distribution information.
	The distribution page (accessible when you click on the above truck icon) will allow you to create multiple project distributions (split the requisition among several projects).
	Adding "One-Time Addresses"
	Delete 1 Line
	Add 1 Line
	Line Detail Information for the requisition line items
	Comments Page
 <a href="#">Special Request</a>	To add an additional item to this Requisition, click the "Special Request" icon/link.
	When you are done adding items, click on the <b>Save and Submit</b> button to create a requisition.

# How Do I Create a Requisition?



## Step 10: Sole Source Items

Click the **Sole Source Flag** checkbox if you only want the requisition to be purchased from the vendor you specify. When you click this box, select a **Reason** (see below) for why it is a sole source.



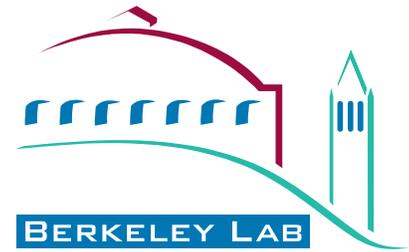
These tables show when sole source information is required:

Typical Requisitions	
< 25K	Nothing is Required
25K – 100K	Check Sole Source box and select a reason.
≥ 100K	Check Sole Source box and attach Justification Form

IUT (Intra-University Transactions – UC)	
< 25K	Nothing is Required
≥ 25K	Check Sole Source box and attach Justification Form

M&O (DOE Management & Operating Contractors)	
Any amount	Check Sole Source box and attach Justification Form

# How Do I Create a Requisition?



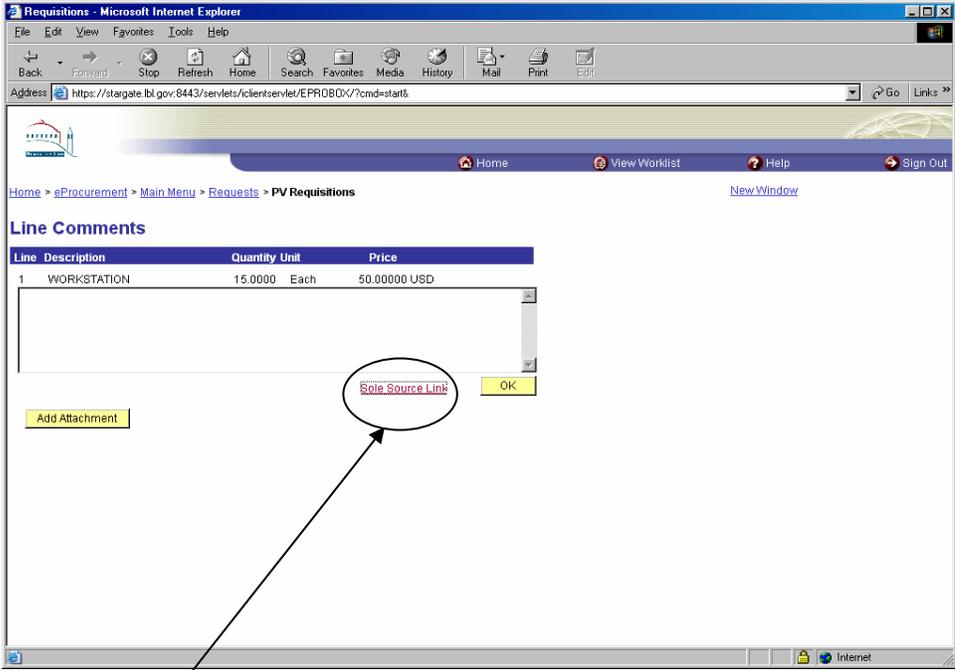
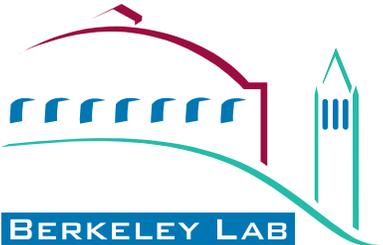
Select a reason from the Table.

1	<a href="#">Unique Capability</a>
10	<a href="#">Other</a>
2	<a href="#">Compatibility with equipment</a>
3	<a href="#">Continued Develop or enhance</a>
4	<a href="#">Unusual or compelling urgency</a>
5	<a href="#">Industrial Mobilization</a>
6	<a href="#">Authorized or req'd by statute</a>
7	<a href="#">International Agreement</a>
8	<a href="#">Leader in Field</a>
9	<a href="#">National Security</a>

If a Sole Source Justification Form is needed, click on the **Comments** icon to access the panel.

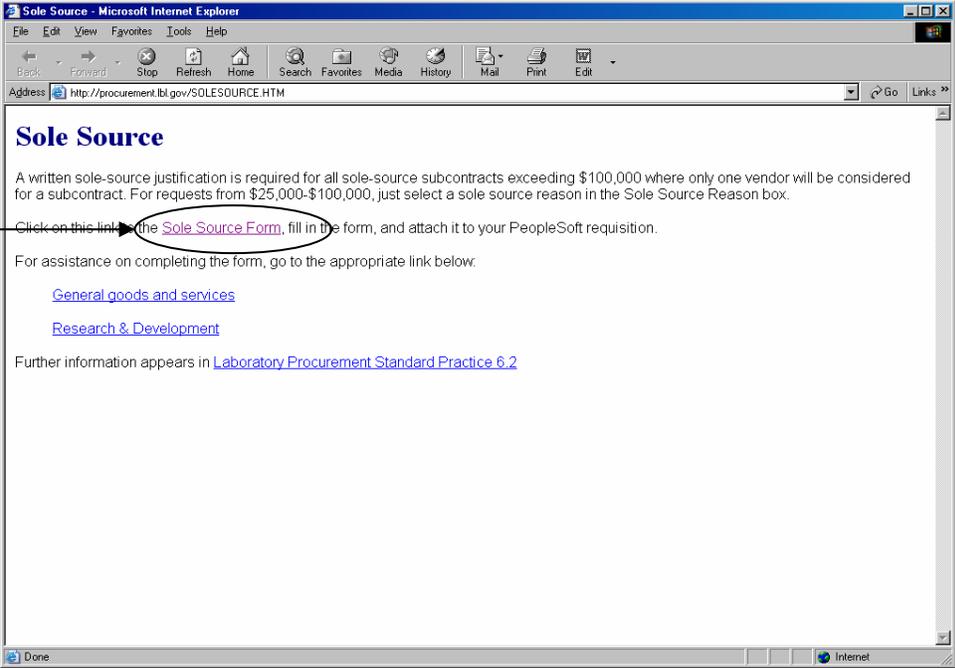
The screenshot shows the Berkeley Lab eProcurement interface. The requisition is for 'John Speros' and is titled 'WORKSTATIONS'. The 'Reason' dropdown is set to '2'. A 'Comments' icon is circled and pointed to by an arrow from the text above. The requisition summary table shows 1 item with a quantity of 5, a price of 150.00 USD Each, and a total amount of 750.00 USD. The interface includes navigation links for 'Home', 'View Worklist', 'Help', and 'Sign Out'. There are also buttons for 'Mark As Template', 'Save For Later', and 'Save and Submit'.

# How Do I Create a Requisition?

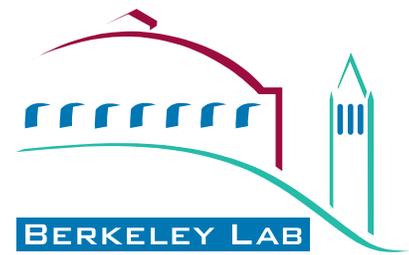


Click on the [Sole Source Link](#) to access the Sole Source Justification Form.

Sole Source Link



# How Do I Create a Requisition?



## Sole Source Justification Form

**BERKELEY LAB JUSTIFICATION FOR SOLE SOURCE PROCUREMENT or INTRA-UNIVERSITY TRANSACTION**

**I. Complete and submit this form with the requisition when the total estimated cost is over \$100,000 and it appears to be a sole source. This form is also used when requesting procurements from the University of California over \$25,000.**

**II. A. Fill in data for the procurement:**

1. Requisition Number:	4. Program and Project:
2. Account Number:	5. Person in charge:
3. Estimated Cost/Price:	6. Estimated delivery time or period of performance:

**B. Check reason(s) for sole source:**

<input type="checkbox"/>	1. Unique capability, expertise, facilities, or equipment that no other source can provide to satisfy the Laboratory's requirements.	<input type="checkbox"/>	6. Authorized or required by statute. (Please identify the statute and explain its effect in an attachment or space below.)
<input type="checkbox"/>	2. Standardization of parts and/or compatibility with existing equipment.	<input type="checkbox"/>	7. International agreement.
<input type="checkbox"/>	3. Follow-on work for continued development or enhancement of goods or services and it is likely that award to a source other than the incumbent subcontractor would result in substantial duplication of costs that would not be recovered or would cause unacceptable delays in fulfilling program needs.	<input type="checkbox"/>	8. Identified source is acknowledged to be leader in its field of expertise as demonstrated in reputable and valid literature, symposia presentations, etc. (Normally appropriate in subcontracting for research and development but not goods and services.)
<input type="checkbox"/>	4. Unusual or compelling urgency (i.e. the necessity to shorten procurement cycle time to meet milestone dates established by a government agency).	<input type="checkbox"/>	9. National Security or public interest.
<input type="checkbox"/>	5. Industrial mobilization or engineering, development, or research capability.	<input type="checkbox"/>	10. Other: (Please explain.)

Fill-in the form and save it to your computer if the form is required according to the above table. Click the **Add Attachment** icon to upload the form (or any other attachment) to ePro. Only enter requisition attachments on Line 1.

Once the attachment has been uploaded, the page will look like this. Check the **Justification Attachment Flag** box before you click **OK**.

Requisitions - Microsoft Internet Explorer

Address: <https://stargate.lbl.gov:8443/servlets/clientservlet/EPROBODX/?cmd=start>

Home > eProcurement > Main Menu > Requests > PV Requisitions

### Line Comments

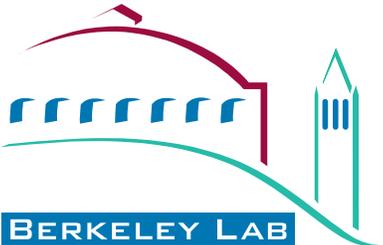
Line	Description	Quantity	Unit	Price
1	WORKSTATIONS	5.0000	Each	150.00000 USD

\*\*\*\* There is an EPRO attachment for this item. \*\*\*\*

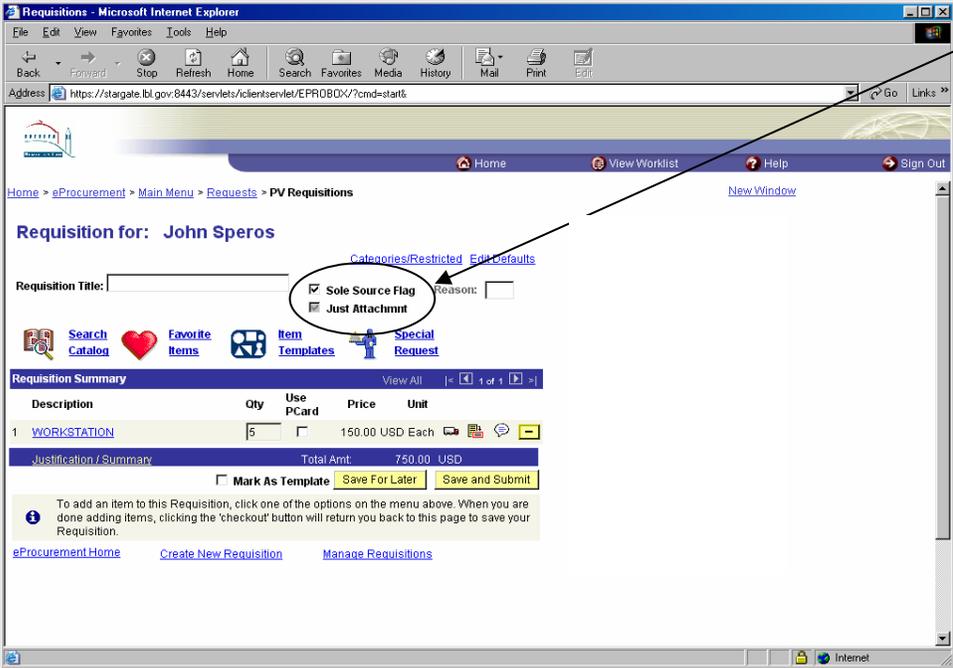
[Sole Source Link](#)

Attached File	View	Justification Attachment Flag	Send to Vendor
1 sole.rtf	<input type="button" value="View"/>	<input type="checkbox"/>	<input type="checkbox"/>

# How Do I Create a Requisition?



Once the file has been attached, the Requisition Summary Page will appear with a check in the **Just Attachment**

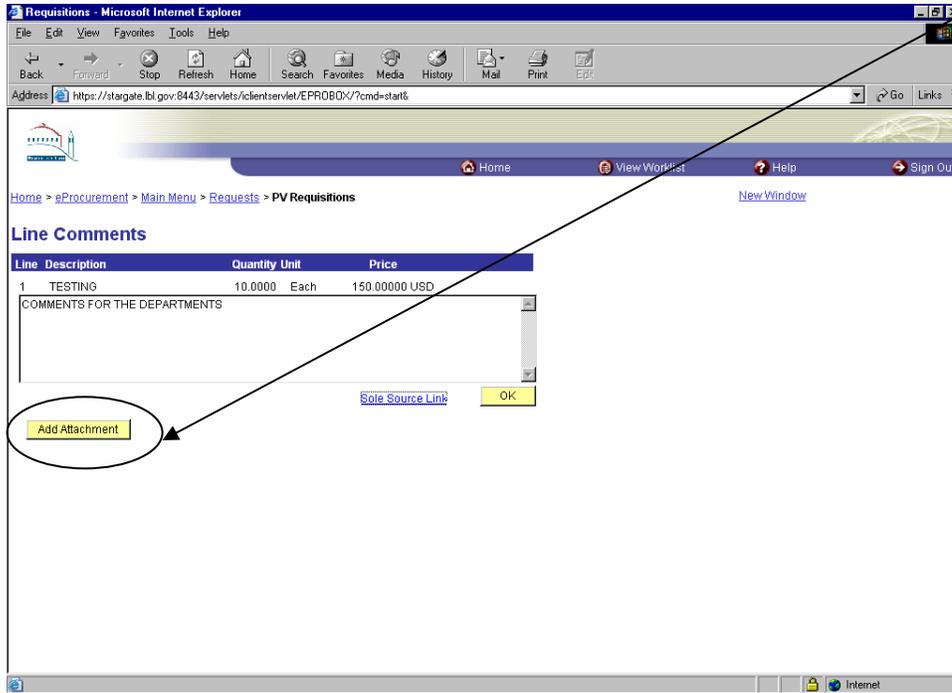


# How Do I Create a Requisition?

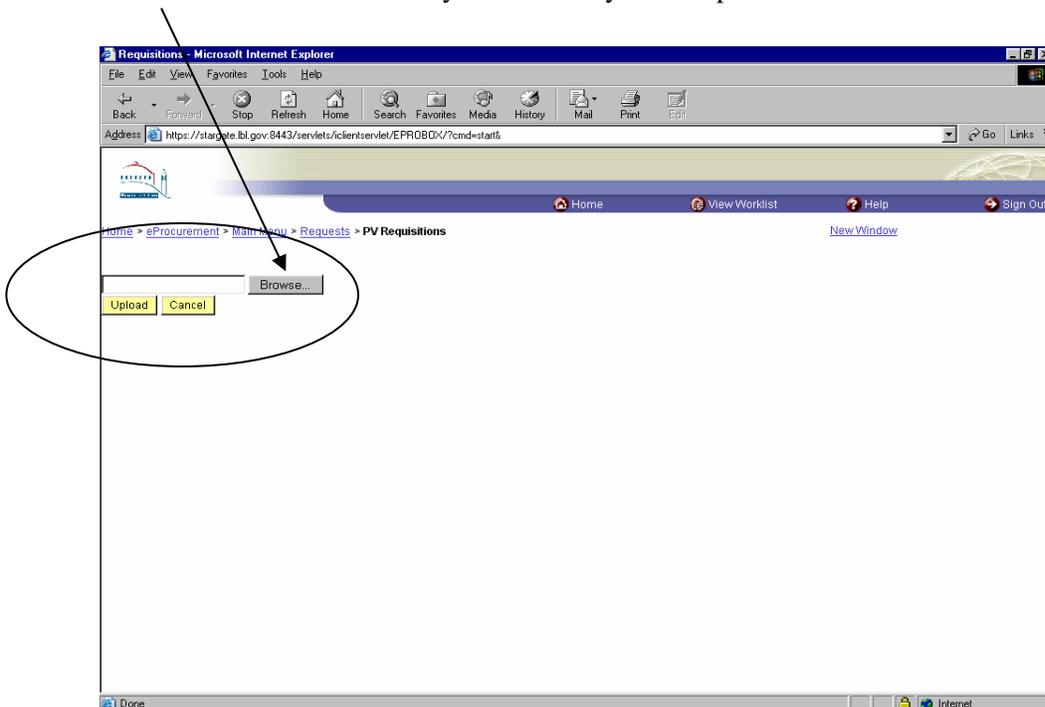


## Step 11: Adding File Attachments

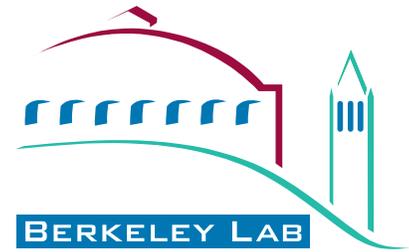
- Click on the **Add Attachment** button to browse to and attach specific files to your requisition.
  - *To add additional attachments repeat these steps.*
  - *All attachments should be added to Line #1 only.*



- The **Browse** button will allow you to search your computer for files to attach.

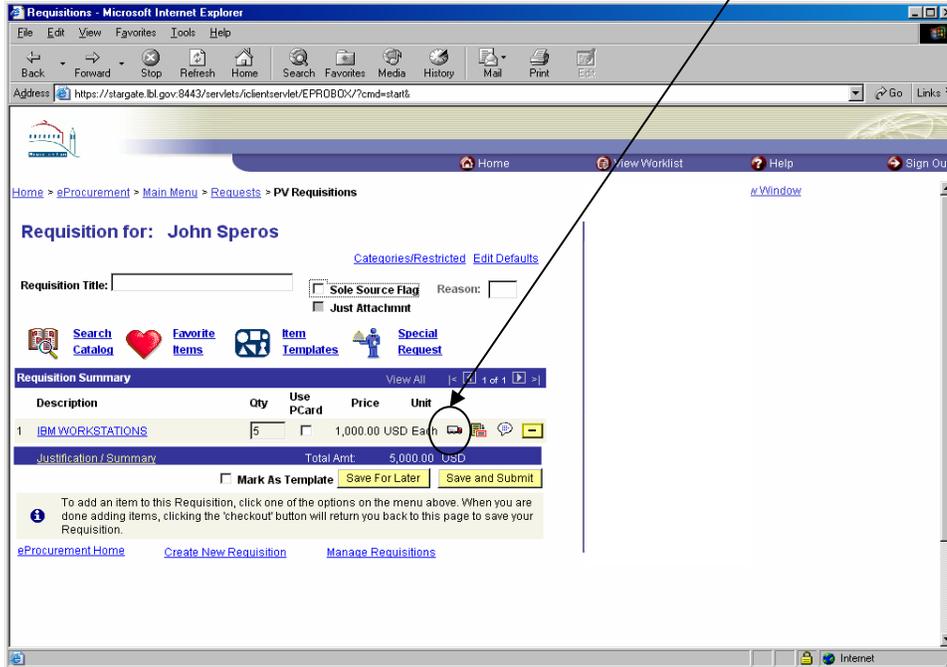


# How Do I Create a Requisition?

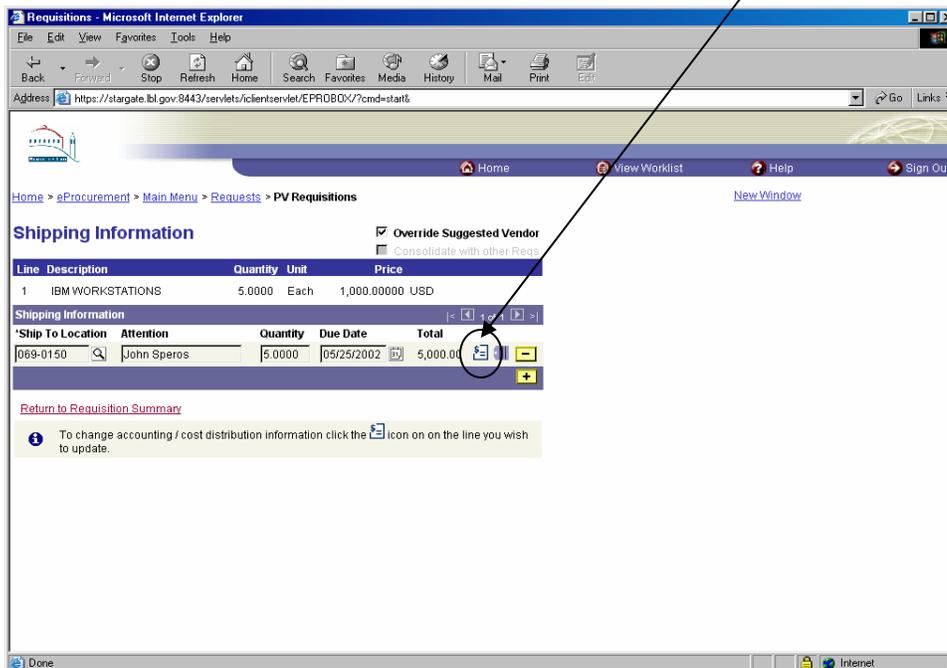


## Step 12: Adding multiple line distributions (Project splits)

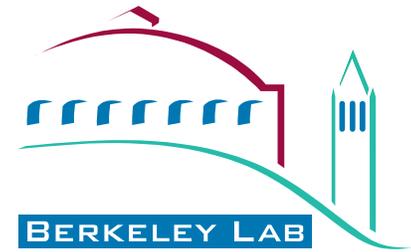
Note: For PCard requisitions, only the project(s) on requisition Line 1 go to the PCard order. To split a line's costs among several Project IDs, begin by clicking on the line's truck **Shipping Info** icon.



On the Shipping Information panel click on the “Cost Distribution Info” icon.



# How Do I Create a Requisition?

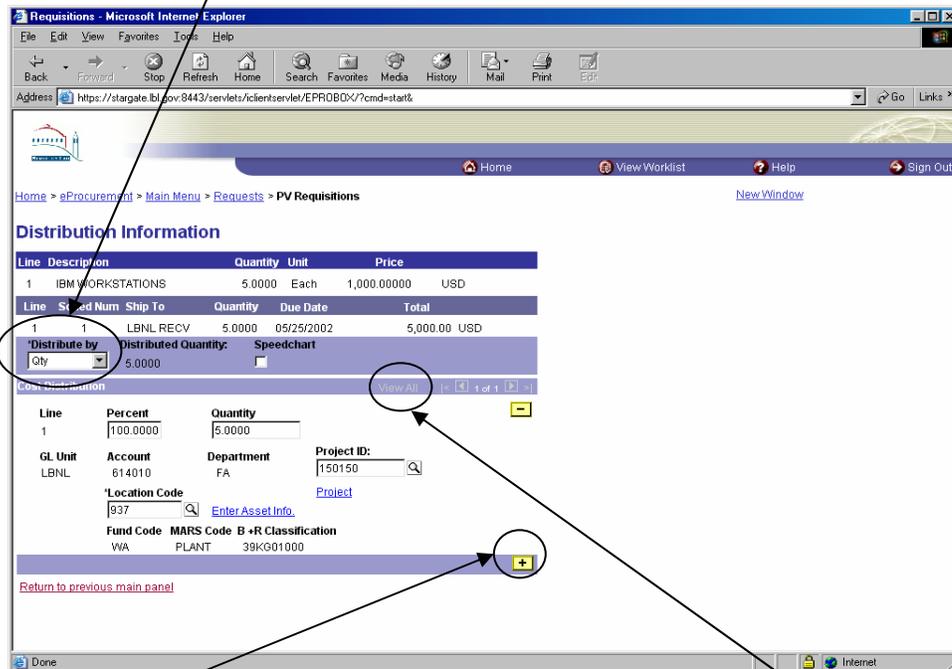


On the “Distribution Information” page, you can add project distribution lines to the requisition (split the requisition line among several projects).

First, decide if you want to **Distribute By** quantity (**Qty**) or amount (**Amt**). For example if there is a quantity of 3, you can distribute by Qty and put 2 on one project and 1 on another. If you want to distribute by Amt, you can put \$50 on one project and \$60 on another. For either Qty or Amt, you can enter percentages instead of actual quantities or amounts.

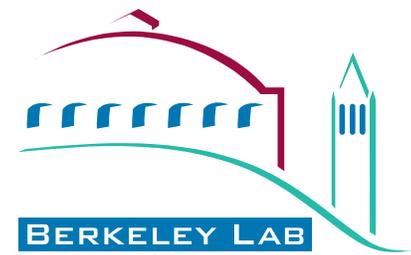
If you distributed by Qty, enter the lesser **Quantity OR Percent** you want to apply to the first project.

If you distributed by Amt, enter the lesser dollar **Total OR Percent** you want to apply to the first project.



Click on the “+” button to add additional project distribution lines. Click the **View All** link to access all the project distribution lines and distribute the projects correctly.

# How Do I Create a Requisition?



If you need to change the project ID for the items, you do that on this page as well. Here are both distribution lines:

Line	Sched Num	Ship To	Quantity	Due Date	Total
1	1	LBNL REC V	5.0000	05/25/2002	5,000.00 USD

Line	Percent	Quantity
1	20.0000	1.0000
2	20.0000	1.0000

When you complete the project distribution, click the “Return to Previous Page” links at the bottom of each page to get back to the main Requisition Summary page. There you can click Save and Submit.

If you need to later look at your requisition’s project distributions or attachments, go to the “Manage Requisitions” page, click on the requisition number, and go to its “Requisition Schedule and Distribution” link. A paperclip will appear if there is an attachment. You can click on it to view the ePro attachments.

Fund Code	Program	Class	Budget Period	Entry Event	Oper. Unit	IN Unit	Loc	Affiliate	Activity	%	Dist	Total
937					20		937				20	1000
2	LBNL	614010	FA	150150	1							
3	LBNL	614010	FA	150150	1							
4	LBNL	614010	FA	150150	1							
5	LBNL	614010	FA	150150	1							

Total Amount: 5000.000

[Return to Previous Page](#) [Return to Requisition Manage](#)