CONTENTS

I. Overview ........................................................................................................................................ 2
   1. EProcurement Overview .......................................................................................................... 2
   2. Log into SFS to Create eProcurement Requisition .............................................................. 2

II. Requisition Settings (Optional) - Create Requisition Specific Defaults.................... 3

III. Methods to Create Requisitions .......................................................................................... 6
   3. Special Request – Most Common .............................................................................................. 6
   4. Template .................................................................................................................................... 10
   5. Express Item Entry - Abbreviated order entry ......................................................................... 12
   6. Favorites ..................................................................................................................................... 13
   7. Recently Ordered ....................................................................................................................... 14

IV. Checkout – Review and Submit Requisition ........................................................................ 15

V. View requisitions from Other Users ...................................................................................... 22

VI. Manage Requisition Page ...................................................................................................... 24
   8. View Status, Lifespan, and Perform Actions on the Requisitions ........................................ 24

VII. System Steps ........................................................................................................................ 28
   9. Copy Requisition (Can be used to create a NEW requisition and resubmit a
      DENIED requisition) .............................................................................................................. 28
   10. Cancel a Requisition ................................................................................................................ 33

VIII. Entering New Fiscal Year Requisitions ............................................................................ 35
    11. New Year Requisitions (May 1 – June 30) ........................................................................... 35

IX. Create Templates and Favorites ............................................................................................ 37
    12. Creating Templates ................................................................................................................ 37
    13. Creating Favorites .................................................................................................................. 38

Revision Control .......................................................................................................................... 40
I. Overview

EProcurement Overview
Eprocurement is being rolled out to create efficiencies in the purchasing process by implementing electronic approval workflow. This streamlines the approval process by allowing a requester to create and submit for approval a request for purchase electronically, thus eliminating the current manual paper process.

Log into SFS to Create eProcurement Requisition
eProcurement Requisitions are created in SFS. Most people use SFS to enter and/or approve Expense reports. This is the same system. Go to the below link to access SFS.
https://portal.sfs.wisconsin.edu

If you have trouble logging in, please reach out to your Business Unit Administrator or contact Security using the below link.
https://www.wisconsin.edu/sfs/security/
II. **Requisition Settings (Optional) - Create Requisition Specific Defaults**

Requisition settings are requisition specific. It allows the Requesters to select a Business Unit, Line, Shipping, and Distribution defaults per requisition. The defaults will apply to all requisition line item(s), but can be changed if necessary. This is similar to PO Defaults.

This can be the first step when creating requisitions, but is not a requirement. If you do not want to enter requisition defaults, skip to Section III (Methods to Create Requisitions.)

1. To create Requisition Settings, navigate to Requisitions Navigator: eProcurement > Requisition

2. Click Requisition Settings at the top of the Create Requisition page

3. The below page will appear. Use the magnifying glass to select a Business Unit, if the business unit you need is not displayed.

4. Please note, the Business Unit you select, **must be the same** as the GL Unit used on the requisition chart field string. See the above screen shot.
5. If you select a different Business Unit, you will be brought back to the Create Requisition page.

6. If you do not need to create other Requisition Setting defaults, choose the method to create a requisition and continue the requisition creation process. Otherwise click Requisition Settings again to go back into the Requisition Settings to select the other defaults. You will notice the Business Unit has changed.

7. Enter Line, Shipping, and/or Distribution Defaults. Use the magnifying glass to populate the fields. Enter as few or as many defaults as needed.

8. **The selection of a category, will default an account into the requisition.** Accounts have been added to each category profile, based on the history. Do not enter an account in the requisition settings page, if a category is selected. The account in the category profile will override an account input. **Please note, the account defaulted into the requisition can be changed if necessary, once in the requisition.**
9. Click Chartfieds2 to enter chart field combination defaults

10. The requisition defaults will apply to all created requisition lines. These can be changed on the requisition, if necessary.

11. Verify the Business Unit and GL unit are the same. If they are not the same, make the update.

12. After entering in the desired Requisition Setting(s), click OK.


14. Click the hyperlink on the selected method to create the requisition.
III. Methods to Create Requisitions

The below screen will appear after the Requisition Settings are entered or the Requester navigates to the Create Requisition page. Select the method to create the requisition.

**Navigator:** eProcurement > Requisition

*Special Request – Most Common*

1. Click Special Request icon

![Special Request Screen]

2. The below screen will appear.

![Special Request Screen]

3. Supplier, Category, and Unit of Measure may already be populated, if selected in the Requisitions Settings.

4. Populate all the Item Detail fields. These are required inputs, as indicated by the "*".
a. * Item Description. – Enter as much information as you can about the product/service you are requesting. For example the model #, terms, contract information, and any other pertinent information.
b. * Price
c. * Quantity
d. * Category – Use the magnifying glass to select a category number. The below screen will appear. *This step may not be a necessary, if category number was selected in the Requisition Settings.*

Click the link on the selected category. The create requisition page will be displayed, with the category name populated in the field. The account per the category’s profile will be populated in the requisition chart field string.

e. Currency – defaults to USD and cannot be updated.
f. * Unit of Measure – Use the magnifying glass to select a Unit of Measure. *This step may not be a necessary, if you selected a UOM in the Requisition Settings.*
g. Supplier is not a required input. It can be entered in by the Buyer once the requisition is converted to a Purchase Order. *This step may also not be a necessary, if you already selected a Supplier in the Requisition Settings.*

h. If entering in a Supplier, use the magnifying glass on the Supplier ID or Name. Select a Supplier. Suppliers for all Business Units will be under Set ID: SHARE, with the exception of UWMSN, Bursars, and DPD.

5. Use the “Additional Information” space for any information you may typically write on paper requisitions today. Examples include contract numbers, special instructions, etc.

6. The below boxes can be checked off to provide further instructions for the requisition.

7. After entering in the information, click **Add to Cart**.
8. The Special Request page will be blank. Enter in additional items if needed. If no additional items need to be added, view the shopping cart to verify ordered items.

9. The shopping cart will display the requested order. 

   *Some browser versions may not display the shopping cart. The process can still proceed.*

10. If ready to proceed, click from the Shopping Cart or at the top of Requisition page.

11. The Checkout – Review and Submit Page will be displayed.

12. Go to the Section IV Checkout – Review and Submit Section of this document to continue the requisition creation process.
Template

Templates are used to order sets of items that are frequently ordered together. Templates can be used to create requisitions. Instructions on creating a Template for future use, are in the Create Template and Favorites section of this document.

1. After Navigating to the Create Requisition page, click the Templates icon, if Templates are available.

2. Available Templates will be displayed.

3. Click the carrot to expand the selected Template. The information highlighted below will carry over into the requisition.
4. Enter the Quantity

5. Click Add

6. The Shopping Cart will appear. If OK with the order, Click at the top of the page or from the shopping cart.

7. The Checkout – Review and Submit Page will be displayed.

8. Go to the Section IV Checkout – Review and Submit Section of this document to continue the requisition creation process.
Express Item Entry - Abbreviated order entry

1. After Navigating to Requisition, Click the Express Item Entry icon.

2. The below page will be displayed

3. Use the magnifying glass to populate the highlighted fields.
   a. Description – Item you are requesting
   b. Quantity
   c. UOM – Unit of Measure
   d. Price

4. Click Add to Cart.

5. The ordered item will be in a Shopping Cart

6. Enter another item, if desired, and click Add to Cart

7. All the ordered item(s) will be in the Shopping Cart.

8. If done, click Checkout from the shopping cart or from the top of the page

9. The Checkout – Review and Submit Page will be displayed.

10. Go to the Section IV Checkout – Review and Submit Section of this document to continue the requisition creation process.
Favorites

Favorites are used to order high frequency items. Favorites can be used to create requisitions.

Instructions on creating Favorites for future use, are in the Create Template and Favorites section of this document.

1. After Navigating to Requisition, click the Favorites icon, if Favorites are available.

2. All the Favorites will be listed. Select a favorite.

3. Enter the quantity, and click Add for each selected item.

4. The ordered item(s) will be in a Shopping Cart.

5. When done selecting items, click Checkout at the top of the page or from the shopping cart.

6. The Checkout – Review and Submit Page will be displayed.

7. Go to the Section IV Checkout – Review and Submit Section of this document to continue the requisition creation process.
Recently Ordered
Recently ordered items will be listed.

1. After Navigating to Requisition, click the icon

2. All the Recently Ordered items will be listed. Select a recently ordered item.

3. Enter the quantity, and click Add for each ordered item.

4. The ordered item(s) will be in the shopping cart.

5. When done selecting items, click at the top of the page or from the shopping cart.

6. The Checkout – Review and Submit Page will be displayed.

7. Go to the Section IV Checkout – Review and Submit Section of this document to continue the requisition creation process.
IV. Checkout – Review and Submit Requisition

Once Checkout is clicked from the Create Requisition page, the Checkout – Review and Submit page will be displayed.

1. Enter a Requisition Name. If a name is not entered, the Requisition Name will be the Requisition ID.

When populating this field, use a name that is descriptive and meaningful. For New Year requisitions created in the current year, use this field to label the requisition as a New Year request. Go to the Entering New Fiscal Year Requisition section of this document, for more details.

2. If adding comments and/or attachments to a requisition line, click the button.
3. The Line Comments page will be displayed.

4. Add commentary

5. If adding attachment(s), click and upload the document. Make sure the name on the attachment is valid.

6. To add multiple comments, click the “+” at the top of the page. **Make sure to enter a comment in the comments section for each attachment.**

7. Click after adding commentary and/or uploading the attachment(s). The Submit page will be displayed.
8. The next steps are for adding Ship To, Location, and chart field string data.

   If Requisitions Setting defaults were entered, the data has already been populated. If there are no changes to the selected defaults and/or a single line requisition was created, skip to step 16.

9. Click at each requisition line, to display Ship To, Location, and chart field combination. 

10. The below will display. Click the carrot next to Account Lines if the accounting line details are not already displayed. Click the magnifying glass to enter the Ship To, the Location, and the GL Unit. **The GL Unit, must be the same as the Business Unit.**
11. At the Accounting Line, click the Chartfield2 tab to display the chart field.

12. Enter a valid chart field combination. Use the magnifying glass if necessary.
   - Account
   - Fund
   - Dept
   - Program
   - Class (optional)
   - GL Unit (required input if you enter in a Project number)
   - Project (optional)

13. If you receive an error message on the chart field combinations, the chartfield string is invalid. Your department manager or Accounts Payable Group can provide a valid chart field combination. If you still have issues, go into WISDM (Main Menu/Other/Funding Validation/Inquiry) for chartfield assistance. https://wisdm2.doit.wisc.edu/wisdm2/EditQuery/EditQuery.aspx

14. Please note, if the requisition has multiple lines, the above steps will have to be completed for each line.
15. Once all the information has been entered for the line item(s), enter Requisition Comments and/or Approval Justification if desired.

16. Look over the requisition to verify inputs.

17. If done and ready to submit the requisition for approval, click . If the requisition is not complete and/or ready to be submitted for approval click This will save the requisition at an Open Status.

18. To finish an Open Status requisition at a later date, select “Edit” Action from the Manage Requisition page. The Manage Requisition section of this document provides more information on completing this action.
19. The below confirmation page will appear after the requisition has been submitted for approval. It will display the Requisition Name and ID and the required Approvals prior to Purchase Order creation.

20. Workflow emails will be automatically generated and routed to the approvers in the workflow. The email will contain a link to the approval page in SFS.

21. Once the requisition is submitted for approval, the requisition creation process is completed. The Status of the requisition can be monitored from the Manage Requisition page.

**Navigator:** eProcurement > Manage Requisition
22. From the Manage Requisition page, enter the Business Unit and/or Requisition ID and click Search.

23. Expand the carrot on the Requisition to view the status of the requisition.

24. The Requester will receive an email when the Requisition is Fully Approved. **This is the only notification the requester will receive.** The Requester will not receive notification when the purchase order is created.
V. View requisitions from Other Users

Users may occasionally have the need to view requisitions from other users. This can be accomplished from the Manage Requisitions page, which will be discussed in step V1. If your current security does not allow you to view other user’s requisitions, contact your BU Administrator to adjust your Requisition Authorization. Below are the screen shots to make updates to the Requester’s Requisition Authorization.

Navigation to the User Preference Screen (Requisition Authorization)

**Navigator > Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences**

![Screen Shot 1](image1.png)

![Screen Shot 2](image2.png)
### Requisition Authorizations

**User:** 000566655  
**MCDONALD, DENISE**

<table>
<thead>
<tr>
<th>Allowed Requisition Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approve</strong></td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
</tr>
<tr>
<td><strong>View</strong></td>
</tr>
<tr>
<td><strong>Update</strong></td>
</tr>
<tr>
<td><strong>Add</strong></td>
</tr>
<tr>
<td><strong>Delete</strong></td>
</tr>
<tr>
<td><strong>Close</strong></td>
</tr>
<tr>
<td><strong>Reopen</strong></td>
</tr>
<tr>
<td><strong>Override Preferred Supplier</strong></td>
</tr>
<tr>
<td><strong>Override RFQ Required Flag</strong></td>
</tr>
<tr>
<td><strong>Override Non-Qualified Requisitions for Close</strong></td>
</tr>
<tr>
<td><strong>Can Work Approved Req's</strong></td>
</tr>
<tr>
<td><strong>Full Auth for All Requesters</strong></td>
</tr>
<tr>
<td><strong>View/Override VAT Details</strong></td>
</tr>
</tbody>
</table>

### Requesters User Authorization

<table>
<thead>
<tr>
<th>Requesters User Auth For</th>
<th>Description</th>
<th>Add</th>
<th>Update</th>
<th>Cancel</th>
<th>Delete</th>
<th>Close</th>
<th>Reopen</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
VI. Manage Requisition Page

View Status, Lifespan, and Perform Actions on the Requisitions

To view the status or perform actions on your requisition, navigate to the Manage Requisition page. Depending on your security, you may also be able to view the status of a requisition from another user. See Section V.

The navigation to the Manage Requisitions page is as follows

Navigator: eProcurement > Manage Requisitions

View Status of Requisition

1. Enter one or more of the below criteria to select the requisition to review.

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Requisition Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition ID</td>
<td>Requests Status</td>
</tr>
<tr>
<td>Date From</td>
<td>Date To</td>
</tr>
<tr>
<td>Requester (EMPL ID)</td>
<td>PO ID</td>
</tr>
</tbody>
</table>

2. Click

3. Select the requisition to review.

4. The Request State column provides the status of the requisition.
   - **Open**: Saved, but not Submitted.
   - **Pending**: Requisition is completed and waiting on Approvals
   - **Approved**: Requisition has been approved, but purchase order has not been created
   - **PO Created**: Purchase Order has been created
   - **PO Dispatched**: Purchase Order has been dispatched to Supplier
5. Click next to the Requisition ID to view the Lifespan of the requisition.

6. Click on any highlighted icon for stage details.
   a. Approvals Icon - View the Approvals
   b. Purchase Orders - Obtain PO ID number and other Purchase Order information.
   c. Invoice - Review Supplier Invoice
   d. Payment - View payment details

A highlighted icon in the Lifespan indicates the stage is complete and available for review.

Perform Actions on a requisition
7. The following actions are available
   a. Copy
   b. Edit (can be used to complete a requisition at an Open status (Saved for Later) and edit an existing requisition)
   c. Approvals
   d. View Print
   e. Cancel
   f. Budget Check (Only available to the ePro Buyer)

8. Use the drop down to select an action and Click “Go” to trigger the action. In the below example, the “Copy” action was selected.
Copy Requisition
Allows you to take an existing requisition and copy it for the creation of a new requisition.

1. Enter the Business Unit and/or the Requisition ID to find the requisition.

2. Use the drop down to select Copy and Click Go

3. You will be brought back to the requisition. Make modifications if needed, and click . The same requisition with a New ID number will be created.

Copy function can also be used to handle Denied requisitions.

If a requisition is DENIED you cannot make updates to the requisition and re-submit it. You have to create a NEW Requisition. The copy function gives you an easy way to do this. You can copy the denied requisition, make the appropriate corrections/updates and click Save & Submit for approval to create a New Requisition.
Edit Requisition (Can be used to complete Saved, but not Submitted Requisitions)

1. Select this Action to complete requisitions at an Open Status. These are requisitions that have been Saved, but not Submitted. Edit can also be used to make edits on existing requisitions. Please note, depending on the edit, the change(s) may reinitiate the approval workflow.

2. Enter the Business Unit and or the Requisition ID as the criteria and click Search

3. The requisition should be displayed.

4. Use the drop down to select “Edit” and click “Go”

5. The Checkout – Review and Submit page will be displayed

6. Finish or modify the requisition.

7. If done and ready to submit the requisition for approval, click Save & submit

8. The requisition will we routed for approval.

Approvals – Displays the approvers on the requisition

View Print – Allows you to view a printable version of the requisition

Check Budget – This function cannot be performed by the requester. This is performed by the Buyer after the requisition is fully approved.
VII. System Steps

*Copy Requisition (Can be used to create a NEW requisition and resubmit a DENIED requisition)*

The copy function is an efficient way to create new requisitions when some or all of the required fields are the same as existing requisitions. As was previously mentioned, this is an efficient way to handle denied requisitions.

1. Follow the below navigation access the Manage Requisition page

   **Navigator:** eProcurement > Manage Requisitions

2. Search for the requisition to Copy using one or more of the below criteria.
   - Business Unit
   - Requisition ID
   - Requisition Name
   - Requests Status (i.e. Approved, Completed, etc.)
   - Date From
   - Date To
   - Requester (Employee ID)
   - PO ID

3. Find the requisition to copy, select “Copy”, and click “Go.”
4. The Checkout-Review and Submit page will be displayed.

5. If no changes are needed, click [Save & submit] at the bottom of the page.
6. To update the item information, click the item hyperlink. Make all the updates, and click Apply.
7. To update the chart field information, click the carrot next to the chart to display the accounting line details.

8. If adding comments and/or attachments to a requisition line, click the 

9. The Line Comments page will be displayed.

10. Add commentary

11. If adding attachment(s), click and upload the document. Make sure the name on the attachment is valid.

12. To add multiple comments, click the “+” at the top of the page. Make sure to enter a comment in the comments section for each attachment.
13. Review the requisition one more time. After all the appropriate updates have been made, Click [Save & submit] at the bottom of the page.

14. The Confirmation Page will be displayed. It will provide the new name of the requisition and the required Approvals.

15. Once the Denied requisition has been copied, cancel the Denied requisition. The next set of instructions, provides information on canceling requisitions.
Cancel a Requisition

To cancel a created requisition, go to the below Navigation. Denied requisitions should be cancelled.

**Navigator:** eProcurement > Manage Requisitions

1. The below screen will appear.

2. Enter in one or more criteria to bring in the requisition to cancel. The more fields populated, the quicker the search. It is recommended to have at least the Business Unit populated in the criteria. It would also be ideal to have the Requisition ID that needs to be canceled.

3. Find the requisition to cancel. Go to the menu to the right and use the drop down to find “Cancel.”
4. Once it is selected, click Go. The below screen will appear.

```
[Image]
```

Click

5. The Manage Requisition page will be displayed. The requisition should have a status of Canceled and a Total Dollar Amount of $0.

```
[Image]
```
VIII. Entering New Fiscal Year Requisitions

New Year Requisitions (May 1 – June 30)

It is recommended to create requisitions in the same fiscal year as the created purchase order. If for some reason a requisition needs to be created in the current year for a purchase order in the new fiscal year, follow the below instructions.

May 1st through June 30th, requisitions for the New Fiscal can be entered into the System. These requisitions must be flagged as NEW YEAR requisitions. The screen shots assume FY19 is the NEW YEAR.

1. Follow the path below to create a requisition.
   **Navigator**: eProcurement > Requisition

2. Enter item information, per the Create Requisition section of this document.

3. Once Checkout is clicked, the Checkout – Review and Submit page will be displayed.

4. Enter FY19 at the beginning of the Requisition Name and in the Requisition Comments section.
5. Finish updating the page using the same instructions, per the Checkout – Review and Submit section of this document.

6. If the requisition is complete and ready to be approved, click

7. The Approvers and Buyers should know the requisition is for a New Year Purchase Order. No vouchering should be done against the created New Year purchase order until after July 2\textsuperscript{nd}.

8. Click if the requisition is not completed and/or not ready to be submitted for approval.

9. The requisition will be at an Open Status. The requisition can be completed before or after the New Year using the Manage Requisition page, Edit action.
IX. Create Templates and Favorites

Creating Templates

1. Once Checkout is clicked, the Checkout – Review and Submit page will be displayed. From here a Template can be created from the requisition that is currently being created.

2. Check the box next to the line item and Click `Add to Template(s)`

3. The below page will appear. Enter a Template Name and description.
4. The next time a requisition is created, the Template method can be used as a starting point in the creation of a new requisition.

Creating Favorites

1. Once Checkout is clicked, the Checkout – Review and Submit page will be displayed. From here a Favorite can be created from the requisition that is currently being created.

2. Check the box next to the line item and Click

3. The below confirmation page will appear. Click OK
4. The next time a requisition is created, the Favorite method can be used as a starting point in the creation of a new requisition.
## Revision Control

<table>
<thead>
<tr>
<th>VERSION</th>
<th>DATE</th>
<th>NAME</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>12/5/2016</td>
<td>Aaron Dise</td>
<td>UAT</td>
</tr>
<tr>
<td>1.1</td>
<td>2/7/2017</td>
<td>Denise McDonald</td>
<td>Updated Per Training Feedback</td>
</tr>
<tr>
<td>1.2</td>
<td>10/10/2017</td>
<td>Denise McDonald</td>
<td>Updated Per Training Feedback</td>
</tr>
<tr>
<td>1.3</td>
<td>5/25/2018</td>
<td>Denise Mcdonald</td>
<td>9.2 Upgrade</td>
</tr>
<tr>
<td>1.4</td>
<td>08/16/2018</td>
<td>Denise Mcdonald</td>
<td>Updated to include comments on Requisition Authorization</td>
</tr>
<tr>
<td>1.5</td>
<td>09/10/2018</td>
<td>Denise Mcdonald</td>
<td>Updated per UAT and Roadshow Feedback</td>
</tr>
</tbody>
</table>