

Shop Contracts (Preferred Vendor)

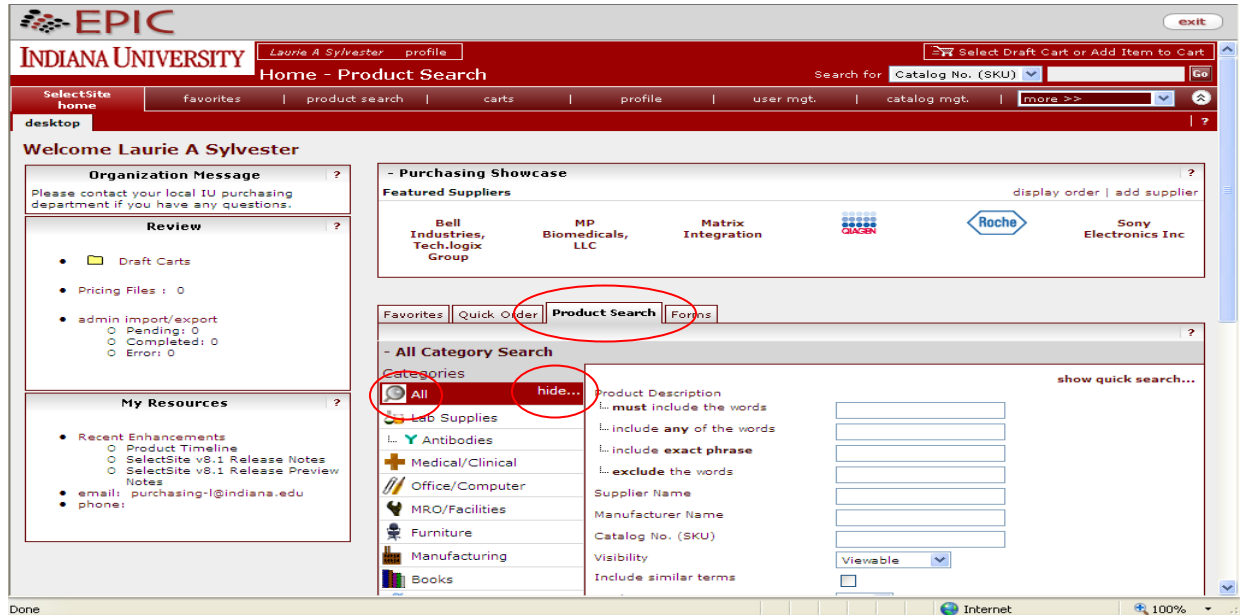
Indiana University has negotiated contracts with a number of vendors, ensuring that staff and faculty have access to the highest quality products available at the best price. Negotiated contacts often include extended warranty plans and service agreements not available in stores. Follow the exercise below to learn the process of purchasing goods through contacted vendors.

In the training environment, select Shop Contracts (preferred vendor).

The screenshot displays the EPIC Training Environment interface. On the left, a sidebar titled "Group Quick Links" contains several menu items, with "EPIC Training Environment" highlighted by a red circle. The main content area features the EPIC logo and the text "Electronic Procurement and Invoicing Center". A prominent red banner across the middle reads "**THIS IS NOT PRODUCTION!! - THIS IS A TEST ENVIRONMENT (TRN)**". Below this, a list of links is shown, with "Shop Contracts (preferred vendor)" circled in red. Other links include "Create a Requisition", "Create a Vendor", "Search for Documents", "Search for Vendors", "Assign a Purchasing Contract Manager", "Manage Quote Lists", "Manage Vendor Stipulations", "Create a Receiving Ticket", and "Search for a Receiving Ticket". At the bottom left, user information is displayed: "User Id is EAX", "User Name is Ax, Ethan", "User Organization is UA-PUR", and "User Campus is BL".

You will be taken to the SciQuest SelectSite. SelectSite is an interface between Indiana University's EPIC system and each contract vendor's order entry system.

Select the Product Search tab, then click “All” under All Category Search. Click “more” to expand the menu. Your screen should look like the image below.

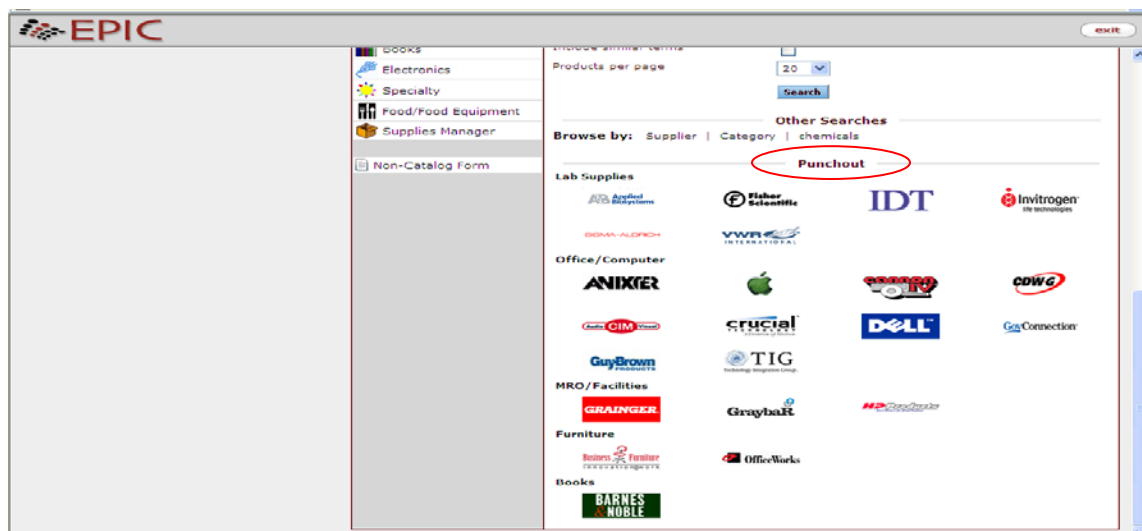


There are two ways to find products through the SelectSite:

1. by using Punchout vendors, or
2. by searching Hosted catalogues.

Punchout Vendors

With Punchout vendors, users “punch out” (click through) directly to a vendor’s website to shop. To shop Punchout vendors’ catalogues, scroll down until you see the Punchout section.



Within the Punchout section, click on a vendor's logo to shop their catalog. In the example below, we selected the Cannon IV logo.



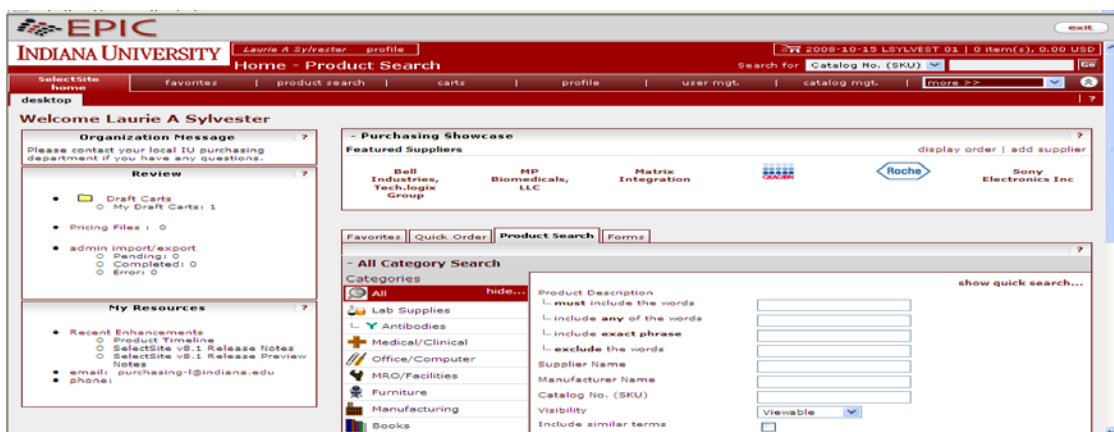
Each vendor Punchout site will have its own unique design and navigational tools. If you do not wish to continue shopping with the selected vendor, click Cancel Punchout (circled in red, above).

See "Checking Out and Transferring your Cart to EPIC" at the end of this section for more information on how to complete your order.

Hosted Catalogs

With Hosted catalogs, users shop vendor catalogs that SciQuest hosts for Indiana University. To better understand how to search for products within Hosted catalogs, return to the screen shown below.

NOTE: Searching within the Hosted Catalogs section will not include items available through Punchout vendors.

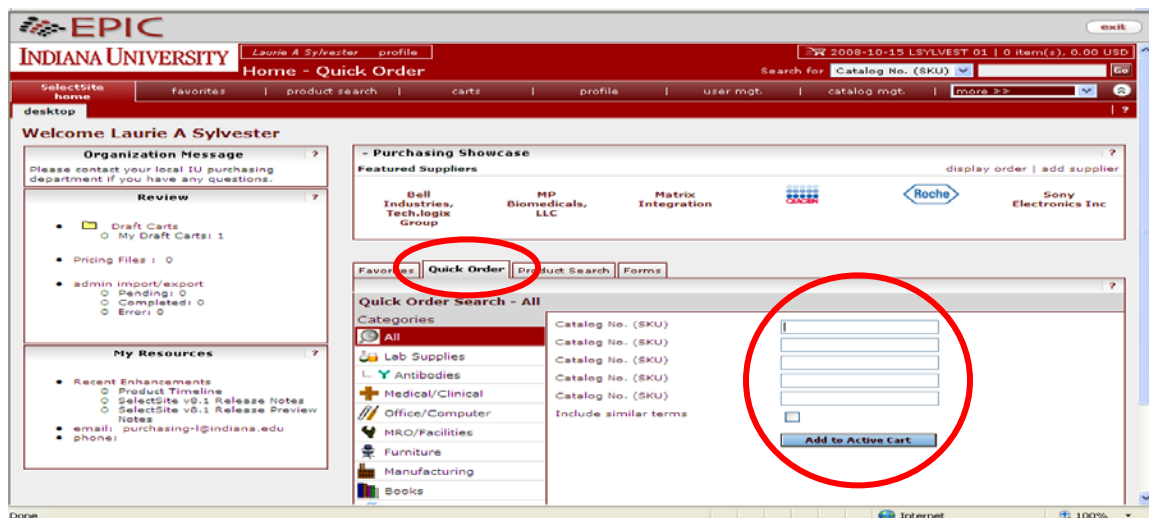


Hosted Catalogs have three popular modes of searching:

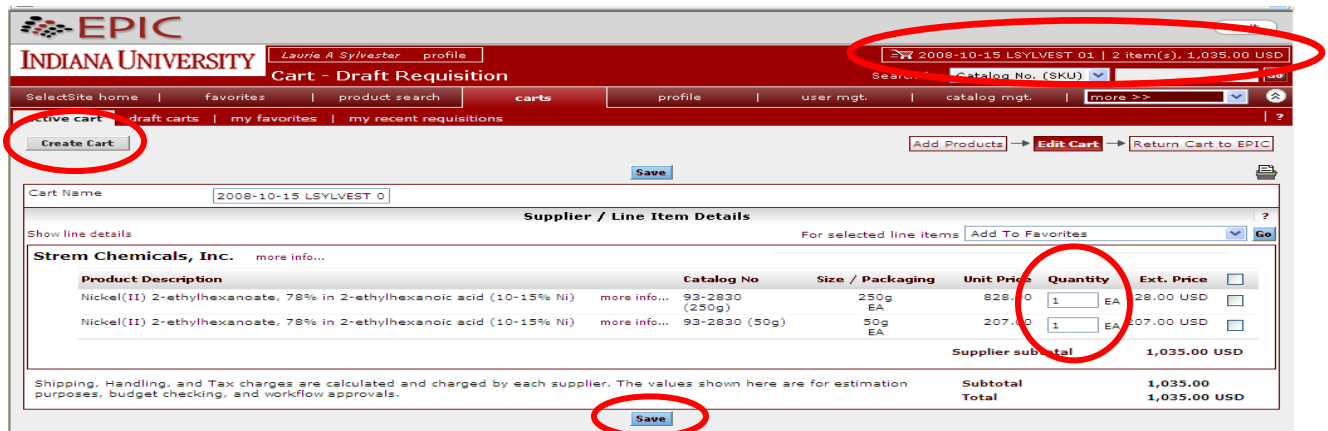
- Quick Order
- Product Search
- Catalog

Quick Order

If you know catalog numbers, use Quick Order (see image below). Enter the complete catalog number in the space provided and click Add to Active Cart.



Your shopping cart appears at the top right of your screen, opposite the IU logo (see image below). At this time, you have the option of changing the quantity of each item (the system will automatically list a quantity of one). After making changes, click the Save button. If you do not click the Save button, changes may be lost.



When done shopping, click on the shopping cart (top-right corner of the screen) to return to the SciQuest SelectSite to review your order. If you are NOT ready to do final check out, click on Draft Carts and this cart will be available for completion/retrieval at a later date. Should you need to start a completely new cart, click on Create Cart (circled above) and proceed.

Product Search

To search for products by product description, supplier, or manufacturer, return to the page shown below and click the Product Search tab.

The screenshot displays the SciQuest SelectSite interface. At the top, the user is logged in as Ethan Ax. The main navigation bar includes 'selectsite home', 'favorites', 'product search', 'carts', and 'history'. The 'product search' tab is highlighted with a red circle. Below the navigation bar, the page is divided into several sections:

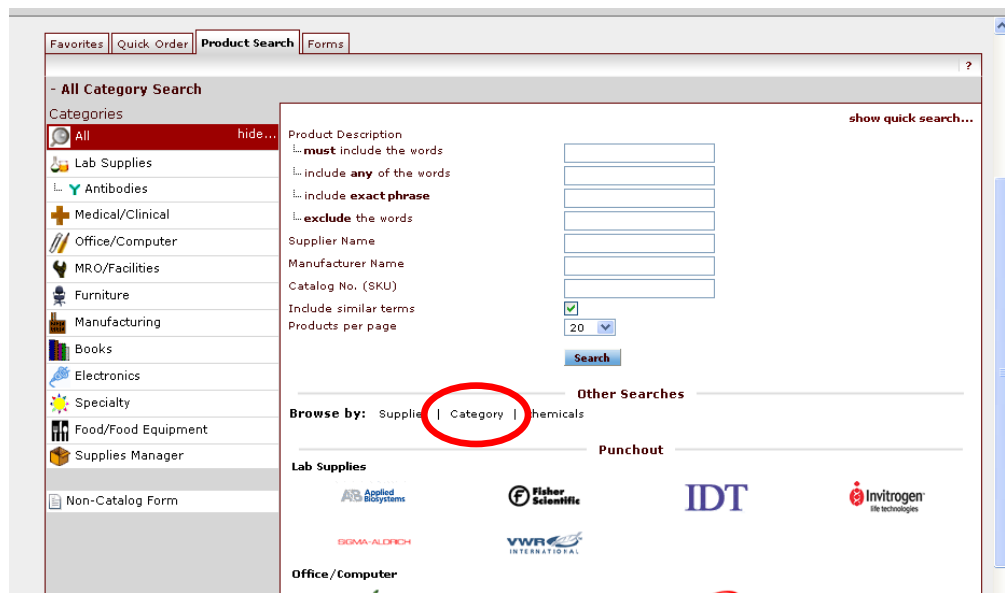
- Welcome Ethan Ax**: A sidebar with 'Organization Message', 'Review' (My Requisitions, History, Draft Carts), and 'My Resources' (Recent Enhancements, email, phone).
- Purchasing Showcase**: A section for 'Featured Suppliers' including Bell Tech Logix, Dell, GE Healthcare, GigaConnection, HAWORTH, and SIGMA-ALDRICH.
- Product Search**: A search form with tabs for 'Favorites', 'Quick Order', 'Product Search', and 'Forms'. The 'Product Search' tab is active. It includes a 'Categories' list (All, Lab Supplies, Antibodies, Medical/Clinical, Office/Computer, MRO/Facilities, Furniture, Manufacturing, Books, Electronics, Specialty, Food/Food Equipment) and a search criteria section with fields for 'Product Description', 'Supplier Name', 'Manufacturer Name', and 'Catalog No. (SKU)'. It also has checkboxes for 'Include similar terms' and a 'Products per page' dropdown set to 20.

Use any of the parameters listed to tailor your search.

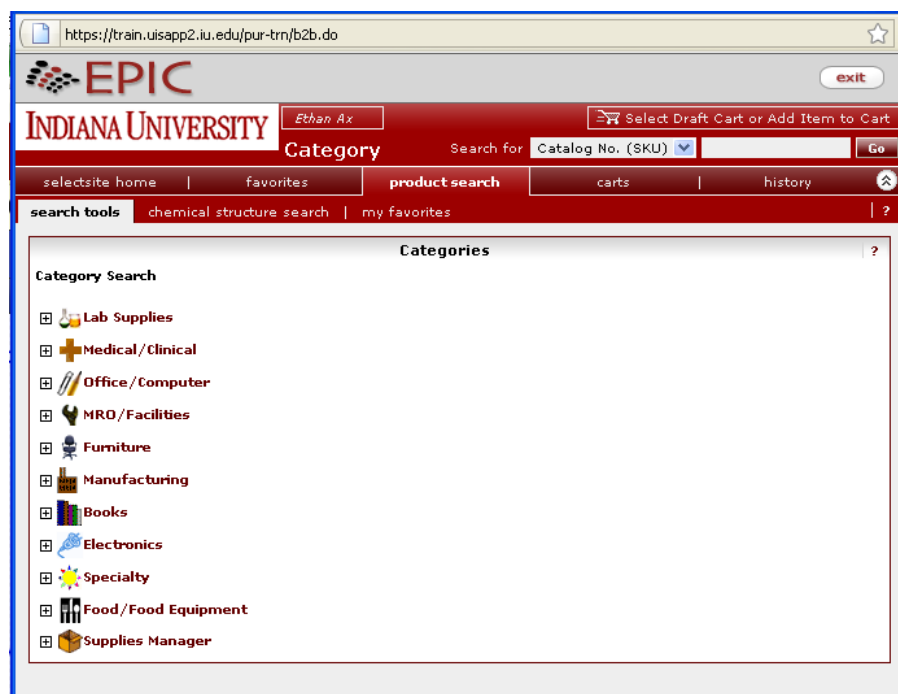
TIP: If you don't find what you're looking for, check the box "include similar terms" and look for matches close to your search requirements.

Category Search

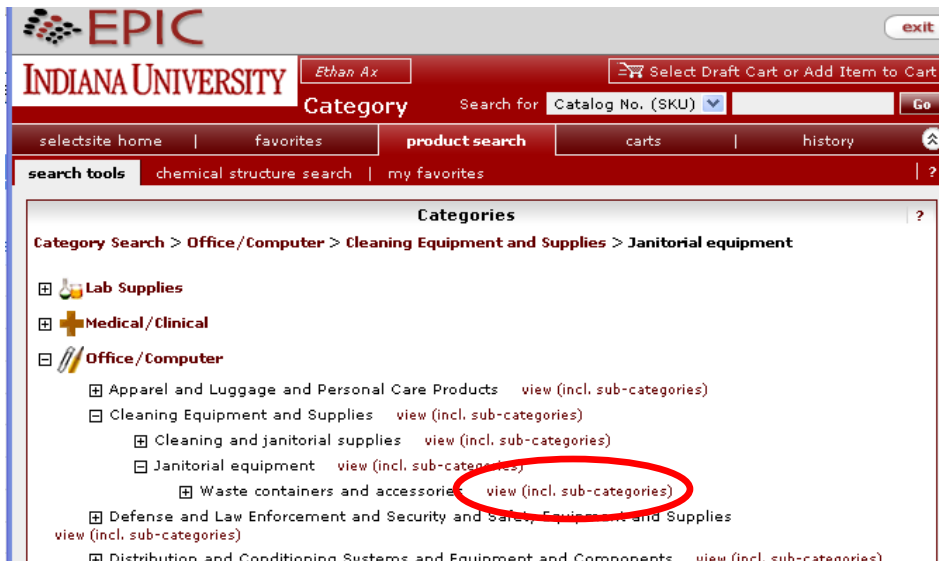
To search by category, click on Category under Other Searches (see image below).



The following page will appear.



Click on a category to drill down to the item you want.



Click “view” next to each category to find specific items and return them to your cart.

Checking Out and Transferring your Cart to EPIC

If you were shopping with a Punchout vendor, the vendor’s website will have a CHECK OUT option to bring the cart back into the SciQuest SelectSite.

If you were shopping using one of the search options, click on the SHOPPING CART button (shown below) at the top of the page to display your cart.



You should see the screen below.



Click “Return Cart to EPIC”. Your order may take a few moments to process. To avoid creating duplicate orders, do not click on “Return Cart to EPIC” more than once.

At this stage, you are done shopping, but your order is not complete. To finalize your order and route it for approval, you must create a requisition. For more information on creating a requisition see Section 4 of this document.

Create a Requisition from Shop Contract (Preferred Vendor)

Once a cart has been transferred to EPIC from the SciQuest site, the following screen appears.

EPIC - Create a Requisition - Windows Internet Explorer
https://uisapp2.iu.edu/pur-prd/requisition.do

Doc Id:	3716589	Req Number:	517857
Doc Status:		Req Status:	In Process
Created:	10/16/08	Initiator:	Sylvester, Laurie A

Create a Requisition
Required fields are denoted by an asterisk. When you are finished, click the continue button at the bottom of this window.

*Delivery Campus:	Bloomington	?
*Funding:	IU Account	?
*Requestor Name:		?
*Requestor Phone:		?
*Requestor Email:		?
Description:	Requisition	?

Complete each of the fields (* indicates required field). In the Description field, describe items specific to your order. For example, "Office Supplies".

NOTE: Please spell your name the same way for all orders (Ex. If you use your middle initial for one order, do so for all orders). This will make searching for orders easier in the future.

After making your entries, click Continue. The following screen will appear.

EPIC

Doc Id:	3716589	Req Number:	517857
Doc Status:		Req Status:	In Process
Created:	10/16/08	Initiator:	Sylvester, Laurie A

Create a Requisition
Required fields are denoted by an asterisk. Use the link to the right of the red arrow in a section header to open or close the section. When you are finished, click one of the buttons at the bottom of this window to take the corresponding action on the document.

Doc Info	show
Vendor	show
Items	show
Payment Info	show
Delivery	show
Additional	show
Internal Notes	show

Open the tabs by clicking the Show button or the Expand All button (circled in the image above). See below for a description of each tab.

Doc Info Tab

[expand all](#) [collapse all](#)

Doc Info ▼ hide

Doc Info	
Description:	Test Order ?
Org Doc Number:	? ?
Fiscal Year:	2009 ?

The Description field from the previous screen will carry over to the Doc Info tab. If no description was given, it can be entered now.

The org doc number (alpha-numeric 10) field is optional and is used by some departments to assign a number/code to special projects. This number, if entered, will appear on all the accounting transactions for this document.

Fiscal Year will always reflect the Current fiscal year and is only editable when approaching the end of a fiscal year. For example, in late June of 2008, the fiscal year may be edited so that the order will be deducted from the 2008-2009 account. The fiscal year always starts July 1.

Vendor Tab

Vendor ▼ hide

Vendor Info	
Suggested Vendor:	Cannon IV Inc. Shop ?
Address 1:	950 Dorman Street ?
Address 2:	? ?
City:	Indianapolis ?
State:	IN ?
Postal Code:	46202 ?
Vendor Contacts:	Wes Stayton: 800-825-7779 ? Outside Sales wes.stayton@cannon4.com additional contacts
Supplier Diversity:	? ?
Phone Number:	800-825-7779 ?
Fax Number:	317-822-4857 ?
Country:	US ?
Contract ID:	IUCANNON01 ?

This requisition was created from Shop Contracts (Preferred Vendors), so the system automatically populated the Vendor tab based upon the Punchout vendor selected. You do not need to take any action here.

Items Tab

#	Qty	UOM	Cat #	Description	Unit Cost	Ext Cost	
1.	1.00	EA	968019-0403	Logitech Classic Keyboard 200 - Keyboard - USB - glossy black - English - North America	17.37	17.37	<input type="button" value="delete"/>
Totals					Total:	17.37	
					APO Spending Limit:	25,000.00	

The cart contents that were transferred to EPIC from the SciQuest SelectSite will appear in the Items tab.

Each line item will have its own accounting segments which can be updated individually or populated via the Account Distribution function. See below for a detailed description of both options.

Items Tab – Accounting for One-Item Orders

For one-item orders, click the EDIT button to display accounting information (see image below).

Qty	UOM	Cat #	Unit Cost	Ext Cost				
1.00	EA	968019-0403	17.37	17.37	<input type="button" value="delete"/>			
Line Item 1 - Description Logitech Classic Keyboard 200 - Keyboard - USB - glossy black - English - North America								
Line Item 1 - Accounts								
Chart	Acct	Sub-Acct	Obj Code	Sub-Obj	Project Code	Org Ref Id	%	
1.							%	<input type="button" value="delete account"/>
<input type="button" value="add additional accounts"/>								
Line Item 1 - CAMS <input type="button" value="add CAMS detail"/>								

Chart, Account, Object Code, and Percentage are the only required fields. The Sub-account, Sub-object Code, Project Code, and Organizational Code are optional. Click on the magnifying glass to use the Lookup function if you are not sure what number to enter. When only using one account, the percentage should be 100%.

Click on Add Additional Accounts if there are other accounts needed for invoice payment. The combined percentages across multiple accounts must always be 100%. For example, to charge half of the order to one account and half the order to a second account, enter “50” in the percentage column for each account.

NOTE: EPIC does not have a “default” object code for requisitions that are created from shopping. Therefore it is important to review each line item of the requisition and apply the correct object code.

Items Tab – Accounting for Multiple-Item Orders

For orders with multiple items that share the same account structure click Setup Account Distribution (circled below).

#	Qty	UOM	Cat #	Description	Unit Cost	Ext Cost	
1.	1.00	EA	968019-0403	Logitech Classic Keyboard 200 - Keyboard - USB - glossy black - English - North America	17.37	17.37	[delete]
Totals					Total:	17.37	
					APO Spending Limit:	25,000.00	

The screen below will appear. Enter the accounting structure to be applied to all items.

EPIC

Distribute Accounts

You may use the "Distribute" button to distribute the accounting structure from this screen across all of the items in the requisition. Line items that already contain account segments will be ignored.

Chart	Acct	Sub-Acct	Obj Code	Sub-Obj	Project Code	Org Ref Id	%	
UA	1915030		5000				100 %	[delete account]

[add additional accounts] [distribute to items] [cancel]

Chart, Account, Object Code, and Percentage are the only required fields. The Sub-account, Sub-object Code, Project Code, and Organizational Code are optional. When only one account is used, the percentage will always be 100%. When finished, click Distribute to Items (circled below).

EPIC

Distribute Accounts

You may use the "Distribute" button to distribute the accounting structure from this screen across all of the items in the requisition. Line items that already contain account segments will be ignored.

Chart	Acct	Sub-Acct	Obj Code	Sub-Obj	Project Code	Org Ref Id	%	
UA	1915030		5000				100 %	[delete account]

[add additional accounts] [distribute to items] [cancel]

The following message should appear above the Doc Info tab:

NOTE: Accounting segments have been distributed to the items where no accounts were present.

Items Tab – Accounting for Multiple-Item Orders When Some Items Use Different Accounts

In the example below, items 3 and 4 follow a different account structure than the rest of the items. Edit items 3 and 4 individually by clicking the “Edit” button next to each item.

Items							
Add/Edit Items							
#	Qty	UOM	Cat #	Description	Unit Cost	Ext Cost	
1.	1.00	EA	Surcharge	Steelcase Metal Surcharge	903.95	903.95	delete
2.	101.00	EA	4611410-6	461 Chair-Pneumatic Height, Mid Back, Back Lock, L...	447.50	45,197.50	delete
3.	50.00	EA	CP-42EHN-1-BS-1	CP-42EHN-1-BS Table Top with Base in Honey Laminat...	337.68	16,884.00	delete
4.	100.00	EA	CP-42EAC-1-BS-1	CP-42EAC-1-BS Table Top with Base in Autumn Lamina...	337.68	33,768.00	delete
5.	20.00	EA	AnthroExtra-2	48" Anthro Cart w/extension tubes, additional shel...	574.58	11,491.60	delete
6.	100.00	EA	AnthroExtra-2	48" Anthro Cart w/extension tubes, additional shel...	574.58	57,458.00	delete
7.	1.00	EA	462LEAPL-12	462 Chair-Adjustable Seat/Arm, Full Back, Lumbar ~...	694.84	694.84	delete
Totals					Total:	166,397.89	
					APO Spending Limit:	25,000.00	

After editing the account structure for an individual item, click “Return to All Items” (circled in the image below) to view your changes and edit any remaining items.

Vendor							
Items							
Line Item 3 - Detail							
Qty	UOM	Cat #	Description	Unit Cost	Ext Cost		
50.00	EA	CP-42EHN-1-BS-1	CP-42EHN-1-BS Table Top with Base in Honey Laminat...	337.68	16,884.00	delete	return to all line items
Line Item 3 - Accounts							
Chart	Acct	Sub-Acct	Obj Code	Sub-Obj	Project Code	Org Ref Id	%
1.	IN	1270410	4300				100 %
add additional accounts							

Click on Setup Account Distribution and define the accounting structure for the remaining items.


Items							
Add/Edit Items							
#	Qty	UOM	Cat #	Description	Unit Cost	Ext Cost	
1.	1.00	EA	Surcharge	Steelcase Metal Surcharge	903.95	903.95	delete
2.	101.00	EA	4611410-6	461 Chair-Pneumatic Height, Mid Back,	447.50	45,197.50	delete

After defining the account structure for the remaining items, click Distribute to Items.

Distribute Accounts



You may use the "Distribute" button to distribute the accounting structure from this screen across all of the items in the requisition. Line items that already contain account segments will be ignored.

Chart	Acct	Sub-Acct	Obj Code	Sub-Obj	Project Code	Org Ref Id	%	
IN	1270410		5200				100 %	delete account
<input type="button" value="add additional account"/> <input type="button" value="distribute to items"/> <input type="button" value="cancel"/>								

Click the review button  at the bottom of the page to check your requisition for errors – the full picture of your account distribution will be much clearer.



The account summary shows the two account structures used to support this requisition:

Account Summary

Detail	Fiscal Year	Chart	Account	Sub-Acct	Object Code	Sub-Obj	Project Code	Org Ref ID	Org Doc #	Estimated Enc. Amt.
	2006	IN	1270404		5200				083105	115,745.89
	2006	IN	1271065		5215				083105	50,652.00

Click Show for each of the account structures to see which line items are covered under each structure:

Account Summary

Detail	Fiscal Year	Chart	Account	Sub-Acct	Object Code	Sub-Obj	Project Code	Org Ref ID	Org Doc #	Estimated Enc. Amt.																		
	2006	IN	1270404		5200				083105	115,745.89																		
<table border="1"> <thead> <tr> <th>Line #</th> <th>Estimated Encumbrance</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>903.95</td> <td>Steelcase Metal Surcharge</td> </tr> <tr> <td>2</td> <td>45,197.50</td> <td>461 Chair-Pneumatic Height, Mid Back, Back Lock, Lumbar Adjustment, Seat Angle/Depth, Arm ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,</td> </tr> <tr> <td>5</td> <td>11,491.60</td> <td>48" Anthro Cart w/extension tubes, additional shelf and document display (small) Bone ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,</td> </tr> <tr> <td>6</td> <td>57,458.00</td> <td>48" Anthro Cart w/extension tubes, additional shelf and document display (small) Bone ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,</td> </tr> <tr> <td>7</td> <td>694.84</td> <td>462 Chair-Adjustable Seat/Arm, Full Back, Lumbar ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,</td> </tr> </tbody> </table>											Line #	Estimated Encumbrance	Description	1	903.95	Steelcase Metal Surcharge	2	45,197.50	461 Chair-Pneumatic Height, Mid Back, Back Lock, Lumbar Adjustment, Seat Angle/Depth, Arm ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,	5	11,491.60	48" Anthro Cart w/extension tubes, additional shelf and document display (small) Bone ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,	6	57,458.00	48" Anthro Cart w/extension tubes, additional shelf and document display (small) Bone ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,	7	694.84	462 Chair-Adjustable Seat/Arm, Full Back, Lumbar ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,
Line #	Estimated Encumbrance	Description																										
1	903.95	Steelcase Metal Surcharge																										
2	45,197.50	461 Chair-Pneumatic Height, Mid Back, Back Lock, Lumbar Adjustment, Seat Angle/Depth, Arm ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,																										
5	11,491.60	48" Anthro Cart w/extension tubes, additional shelf and document display (small) Bone ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,																										
6	57,458.00	48" Anthro Cart w/extension tubes, additional shelf and document display (small) Bone ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,																										
7	694.84	462 Chair-Adjustable Seat/Arm, Full Back, Lumbar ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,																										
	2006	IN	1271065		5215				083105	50,652.00																		
<table border="1"> <thead> <tr> <th>Line #</th> <th>Estimated Encumbrance</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>3</td> <td>16,884.00</td> <td>CP-42EHN-1-BS Table Top with Base in Honey Laminate ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,</td> </tr> <tr> <td>4</td> <td>33,768.00</td> <td>CP-42EAC-1-BS Table Top with Base in Autumn Laminate</td> </tr> </tbody> </table>											Line #	Estimated Encumbrance	Description	3	16,884.00	CP-42EHN-1-BS Table Top with Base in Honey Laminate ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,	4	33,768.00	CP-42EAC-1-BS Table Top with Base in Autumn Laminate									
Line #	Estimated Encumbrance	Description																										
3	16,884.00	CP-42EHN-1-BS Table Top with Base in Honey Laminate ~ PLASTIC=Plastic,POLYPRO=Polypropylene,6205=Black,UPHLS TRY=Upholstery,LINK=Link,5A23=Green,																										
4	33,768.00	CP-42EAC-1-BS Table Top with Base in Autumn Laminate																										

Items Tab – Capital Asset Management (CAMS)

For single items with a value of \$5,000 or more, a capital object code (codes starting with 7000) is required. You must also select the CAMS Transaction Type and add comments as necessary (circled in the image below). The Transaction Type identifies the type of capital addition and is selected from the pull-down menu.

The screenshot displays the 'Line Item 1 - Detail' form. The 'CAMS Tran Type' dropdown menu is circled in red, and the 'Comments' text box is also circled in red. The form includes fields for Qty (3.00), UOM (EA), Cat # (FA289A), Description (HP IPAQ Pocket PC i21710 Ram 32mb), Unit Cost (248.55), and Ext Cost (745.65). Below the detail section is the 'Line Item 1 - Accounts' section with fields for Chart, Acct, Sub-Acct, Obj Code, Sub-Obj, Project Code, Org Ref Id, and %. The 'Line Item 1 - CAMS' section includes a dropdown for CAMS Tran Type, a note: 'Note: Asset numbers are not allowed for CAMS Tran Types of New or Lease.', an Asset Number 1 field, and a Comments field.

The Transaction Type selected will determine whether or not an existing Asset Number (not TAG Number) will be required in order to continue requisition processing. Here is a brief description of each Transaction Type:

- **NEW** indicates to Capital Asset Management that when a PREQ is processed a new asset will be created in the University Asset Database. Capital assets must have a unit cost of \$5,000.00 or more and an expected life of one year or more to be capitalized.
- **MODIFY EXISTING** indicates that the line item purchased is a component of an existing asset. This will ensure that payments (PREQ) will be applied to the correct asset number(s). When components are added to an existing asset the asset becomes a system. A system is defined as items that work together to perform one function. To capitalize a component the unit cost must be \$1,000.00 or more.
- **FABRICATION** is an asset created (built) by an Indiana University organization. A Fabrication Request document generates the asset number that is required when the Fabrication Transaction Type is selected. Therefore, the organization must submit a Fabrication Request document prior to any purchases.
- A **LEASE** purchase is the act of acquiring assets by making periodic payments, which generally consist of principle and interest. Interest is an operational expense, where as the principle payments reduce the balance of the long term liability. As the liability is reduced, the equity in the asset increases. Selecting the transaction type of Lease will indicate to Capital Asset Management that the PO is for a lease agreement.

- ASSET GIVEN IN TRADE.** University owned capital equipment may be offered for trade-in by your campus Purchasing Organization for similar capital equipment. The line item should list the dollar amount received (or trade-in allowance) for the assets being traded-in. Once the department and Purchasing have determined that existing assets will be traded in on a purchase order and the purchase order has been issued, the department will need to issue an asset retirement document for those assets being traded in.

Payment Information Tab

The billing address will automatically be populated based upon the Delivery Campus selected in the Delivery Tab.

Delivery Tab

Select the campus and building where the invoice/bill should be sent. The campus you select will determine what building codes are available in the Building drop-down menu.

Address 1, City, State, and Postal Code automatically populate based upon the building selected, unless the building “Other” is selected. When “Other” is selected, the end user will manually fill in Address, City, State, and Postal Code. A room number must be entered regardless of the selected building.

“Deliver To” is a required field and should always be the name of the person who will receive the goods. This is not necessarily the same person as the Requestor or the IU Department Contact. The E-mail Address and Phone Number fields pertain to the “Deliver To” person.

Additional Tab

Additional			
*Organization:	UA - PUR	*Requestor Name:	Laurie
*Method of PO Transmission:	Electronic	*Requestor Phone:	888-999-6666
*Cost Source:	Competitive Quote	*Requestor Email:	LA@indiana.edu
IU Dept Contact:		Reference 1:	
IU Dept Contact Phone:		Reference 2:	
IU Dept Contact Email:		Reference 3:	

The Additional Tab contains information that is helpful to processing the requisition.

- **Organization:** The chart/org is initially set to the chart/org that the initiator is a member of, however it can be changed by using the look up feature.
- **Method of PO Transmission:** How the Purchase Order will be sent to the vendor. Options include FAX, MAIL/PRINT, EMAIL, or ELECTRONIC.
- **Cost Source:** How the pricing was determined. Options may include QUOTE, PRICING AGREEMENT, ESTIMATE, etc.
- **IU Dept Contact/Phone/Email:** The person in the department who the vendor should contact if there are questions about an order/delivery/etc. If this field is blank the REQUESTOR name (required) becomes the contact for the vendor.
- **Reference Field:** A free-form text field to help department identify a requisition.


Internal Notes Tab

Internal Notes	
Send Email	
Send To E-Mail Address:	
Multiple addresses must be separated with semi-colons send email	
Add Note	
Note:	
save note	


The notes field is a free-form text field for internal notes (it is not viewable by the vendor). Notes may be used to communicate grant justification information, special instructions for Purchasing, etc.

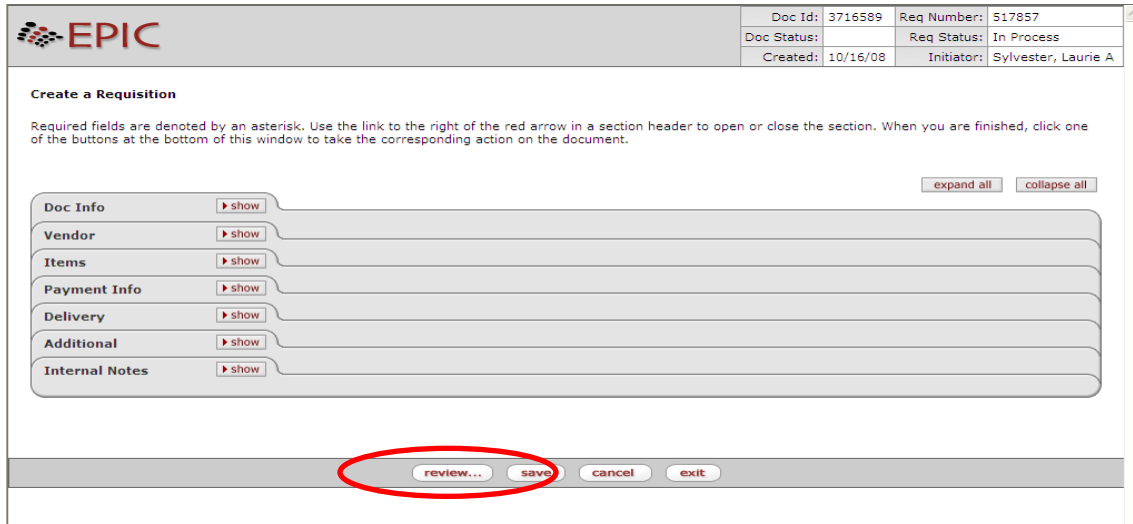
The approval process may move more quickly if justifications for the expense are provided here. This is especially true for any requisition that will ultimately need approval from the Contracts & Grants Administration. Anyone in the Workflow routing chain will be able to read the notes.

Use the “Send to E-mail Address” section to send the note to multiple individuals who may have an interest in the requisition but are not involved in the routing chain. Each e-mail address must be

entered separately. E-mails to a distribution list are not allowed. To save/send the note, press the Save Note button  .

Review and Route

When the tabs are complete, review your requisition before routing it for approval. Press the Review button  to check for any errors or missed required fields.



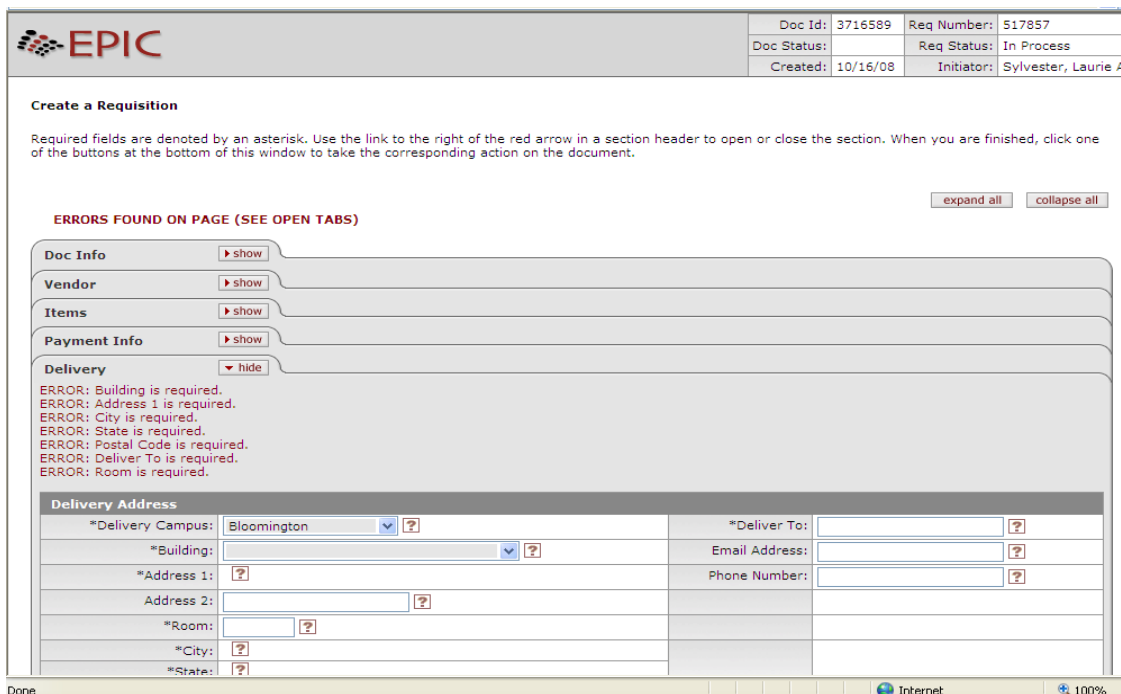
The screenshot shows the EPIC 'Create a Requisition' form. At the top right, there is a table with document and requisition details:

Doc Id:	3716589	Req Number:	517857
Doc Status:		Req Status:	In Process
Created:	10/16/08	Initiator:	Sylvester, Laurie A

Below the table, the form is titled 'Create a Requisition' and includes instructions: 'Required fields are denoted by an asterisk. Use the link to the right of the red arrow in a section header to open or close the section. When you are finished, click one of the buttons at the bottom of this window to take the corresponding action on the document.'

There are several expandable sections: Doc Info, Vendor, Items, Payment Info, Delivery, Additional, and Internal Notes, each with a 'show' button. At the bottom, there are buttons for 'expand all', 'collapse all', 'review...', 'save', 'cancel', and 'exit'. The 'review...' button is circled in red.

EPIC will expand each tab that contains errors and tell you what's missing or invalid (as shown in the image below).



This screenshot shows the same EPIC 'Create a Requisition' form, but with error messages displayed. The 'Delivery' section is expanded, and the following error messages are shown:

ERRORS FOUND ON PAGE (SEE OPEN TABS)

- ERROR: Building is required.
- ERROR: Address 1 is required.
- ERROR: City is required.
- ERROR: State is required.
- ERROR: Postal Code is required.
- ERROR: Deliver To is required.
- ERROR: Room is required.


The 'Delivery Address' section is also expanded, showing the following fields:

*Delivery Campus:	Bloomington	*Deliver To:	
*Building:		Email Address:	
*Address 1:		Phone Number:	
Address 2:			
*Room:			
*City:			
*State:			

The bottom of the screen shows a Windows taskbar with 'Done', 'Internet', and '100%' visible.

Make any necessary corrections and press the review button  again.

When all errors are corrected, EPIC will present a requisition summary of what will be routed via WORKFLOW[®] for approval. Make any additional edits as necessary.

When finished, press the route button  at the bottom of the screen. You do not need to specify an approver user ID, as that logic has already been determined by your organization's chart manager in WORKFLOW[®].

If you have been set up as an approver in WORKFLOW[®], you will see a button at the bottom of the screen that says "Approve". You must approve the document before it will be routed to the next level.