

# eReq: Creation Process

## Procurement & Business Services

### Overview

As of October 1<sup>st</sup>, 2017, Procurement and Business services has implemented an eRequisition system to be used for the following scenarios:

1. Purchases over \$3000.00. (Exceptions are noted within the Spending Policy)
2. Purchases for which funds are to be encumbered.
3. Purchases which require bids.

This system was put into place as a means of continuing the advancement of technology, improving the quality of customer service to campus with more efficiencies, and improving sustainability efforts within Business & Finance. Users of the eRequisition system are able to follow the status of the requisition to purchase order process from inception to completion.

### How To

To access the eRequisition system, users will need to sign into Self Service and click on the “Finance” tab. From there, the link for the eRequisition system will be listed in alphabetical order. At this point, users can begin the eRequisition creation process with the steps that follow.

eRequisition System

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**Ship Code or new shipping address is required.**  
**Delivery date is required.**  
**No detail requisition records were entered, at least one must be entered.**  
**Backup documentation is required.**

**Data Saved but eRequisition has errors.**  
**eRequisition ID: R0064795**

**\* Marks required fields.**

<p>1. <b>Vendors's Banner/User ID</b> 902502446 <input type="button" value="Validate ID"/> or <input type="button" value="Search for Vendor"/> or leave blank: 2. Kendall Electric Inc</p> <p>3. <b>Vendor Address in Banner *</b> 131 Grand Trunk Ave Battle Creek, MI 49037 [VO-1] <input type="button" value="v"/> <b>Vendor Address (override)</b> <input type="text"/> <b>City State, zip (override)</b> <input type="text"/> <input type="text"/> <input type="text"/> <b>Vendor Contact</b> James Pierce <input type="text"/> <b>Vendor Phone</b> <input type="text"/></p> <p>4. <b>Transaction Date *</b> 07/27/2018 <input type="text"/></p> <p>5. <b>Delivery Date *</b> <input type="text"/></p> <p>6. <b>Non-US Vendor *</b> No <input type="button" value="v"/></p> <p>7. <b>Terms and Conditions *</b> No <input type="button" value="v"/></p> <p>8. <b>Disclosure Statement Attached *</b> (for total over 5000) No <input type="button" value="v"/></p> <p>10. <b>Software/Software as a Service/IT Related Services *</b> No <input type="button" value="v"/></p> <p>11. <b>Shipping Address *</b> <input type="text"/></p>	<p><b>Preparer's Name *</b> Matthew Pike</p> <p><b>Preparer's Email *</b> pikemat@auburn.edu</p> <p><b>Dept Name *</b> Procurement &amp; Business Svcs <input type="text"/></p> <p><b>Office Phone # *</b> 8443630</p> <p><b>Vendor Email</b> james.pierce@kendallelectric.com <input type="text"/></p> <p><b>Department/Center Orgn *</b> 113600 Procurement and Business Services</p> <p><b>Attention</b> <input type="text"/></p> <p><b>Delivery Comment</b> <input type="text"/></p> <p><b>Quote Number</b> <input type="text"/></p> <p>9. <b>Sole Source *</b> No <input type="button" value="v"/></p> <p>10. <b>Software/Service has been vetted *</b> (If Yes, attach verification) No <input type="button" value="v"/></p> <p><b>Shipping Address Update/Override</b> <input type="button" value="Show Shipping Address/Override"/></p>
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- 1) To begin the eReq creation process, one of the following can be completed:
  - a. Enter the Banner ID for the vendor or search for the vendor based on their name. Once the Banner ID is typed in or the search is complete, click "Validate ID."
  - b. If the requisition is for a bid, a Banner ID should not be entered.
- 2) Once the Banner ID is entered, click "Validate ID."
- 3) After the vendor is validated, select the appropriate "VO" address from the drop down menu. If the correct address is not listed, you may enter the address into the Vendor Address (Override) section.
- 4) The "Transaction Date" will populate based on the day that you begin the eReq process.
- 5) The "Delivery Date" must be at least one day following the "Transaction Date."
- 6) If the vendor selected is a non-US vendor, choose the appropriate answer from the drop down.
- 7) Should the quote or contract received reference any terms and conditions related to the purchase or services being requested, select "Yes" from the drop down.
- 8) For any transaction over \$5000.00, a completed and notarized Disclosure Statement must be uploaded and "Yes" should be selected from the drop down menu. **(Clicking the link below will open the disclosure statement in an internet browser.)**  
  
<https://ago.alabama.gov/Documents/File-AL-Vendor-Disclosure-Statement.pdf>
- 9) If the product or services requested requires a Sole Source, please choose "Yes" from the drop down menu and upload the sole source justification with the backup documentation for the requisition.
- 10) If the product or service requested is software, software as a service, or IT related services, please choose "Yes" from the drop down menu. If the product or service has been vetted by OIT, please choose "Yes" from the drop down menu and upload the verification with the backup documentation for the requisition.
- 11) Choose the correct shipping address for the location products or services are to be delivered to.

**\*\*\*CLICK SAVE PROGRESS AT THIS POINT TO ENSURE NO LOSS OF PREVIOUSLY ENTERED INFORMATION\*\*\***

12.

13.

[Click here to download the Excel template spreadsheet to use for copying data to this web page.](#)

14.

#	Fund *	Orgn *	Acct *	Prog *	Actv	Part #	Description *	Unit Of Measure *	Quantity *	Price *	Additional Amt	Total
Clear -> 1							Characters remaining 1000					\$ .00
Clear -> 2							Characters remaining 1000					\$ .00
Clear -> 3							Characters remaining 1000					\$ .00
Clear -> 4							Characters remaining 1000					\$ .00
add 5							Characters remaining 1000					\$ .00
Grand Total: \$ .00												

17.

12) The PO Comments field should be used for any information you would like printed on the purchase order. This field within Banner was previously known as “Document Text.”

13) The Additional Comments field should be used for any internal notes you would not like printed on the purchase order. This field was previously unavailable in Banner.

14) FOAP designations are now to be entered at a 1 to 1 ratio. For each commodity line, you will only be able to enter one FOAP. If you have multiple FOAPs being used for one commodity line, you will need to split the total commodity amount by the number of FOAPs being entered for the one commodity.

***If entering the FOAPs and commodity lines are easier via an Excel spreadsheet, you can download a template that will tie into the eReq system once completed.***

**\*\*\*CLICK SAVE PROGRESS AT THIS POINT TO ENSURE NO LOSS OF PREVIOUSLY ENTERED INFORMATION\*\*\***

15. **Documentation is Required \*** (retain original documentation for a rolling year)

**Uploaded Documents**

File Name	Comment	Date	Userid

16. **Route requisition for additional approval.(Not Required)**  
 Comma delimited list of AU User IDs/Banner 50 numbers.  
(Use this option to route the requisition to individuals other than the preparer or the Orgn Code Approver)

[Extract data to Spreadsheet - Generate Requisition as a PDF](#)

15) All backup documentation uploaded into the eReq system must be in a PDF file format. Once it has been selected for upload, comments can be entered to identify the file for approvals.

16) Should you wish to route the eReq to additional approvers, you may enter the user ID or Banner ID assigned for that person in this field.

**\*\*\*CLICK SAVE PROGRESS AT THIS POINT TO ENSURE NO LOSS OF PREVIOUSLY ENTERED INFORMATION\*\*\***

17) Once all information has been entered and the requisition is ready for the approval queue, click "Queue Requisition to be Approved."

***Note: For questions related to the eRequisition process, please contact Cynthia Caldwell-Jackson at 334-844-7771 or [caldwcy@auburn.edu](mailto:caldwcy@auburn.edu).***