Requisition Instructions

Version 1.4

8/14/2020

Contents

Logging in to ESM

Using Mozilla Firefox or Google Chrome, log into My IRIS Web with your net ID and password.
https://irisweb.tennessee.edu/irj/portal

Disable all pop-up blockers for your web browser

- For Mozilla Firefox:
  - Click on the "Firefox" drop down menu and select "Options"
  - Click on "Content" and uncheck the "Block pop-up windows" box
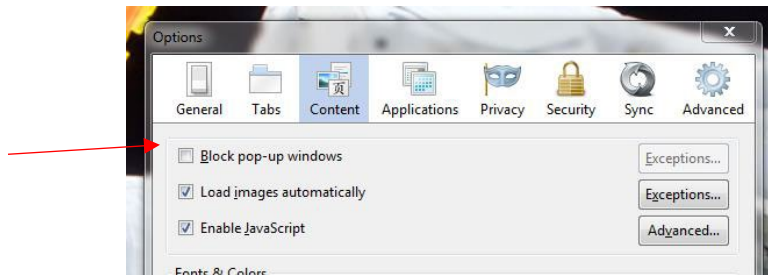
- For Google Chrome:
  - Go to Chrome://settings/content
  - Click to select the "Allow all sites to show pop-ups" radio button.
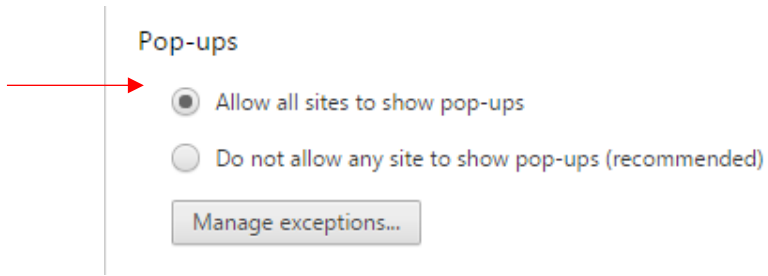
Select the shop folder to the get to the UT Market Place where you can shop the catalogs or create a requisition.

Setting Default Ship-To and Bill-To Address

If this is your first time using this system, you will need to set up default ship to and bill to addresses.

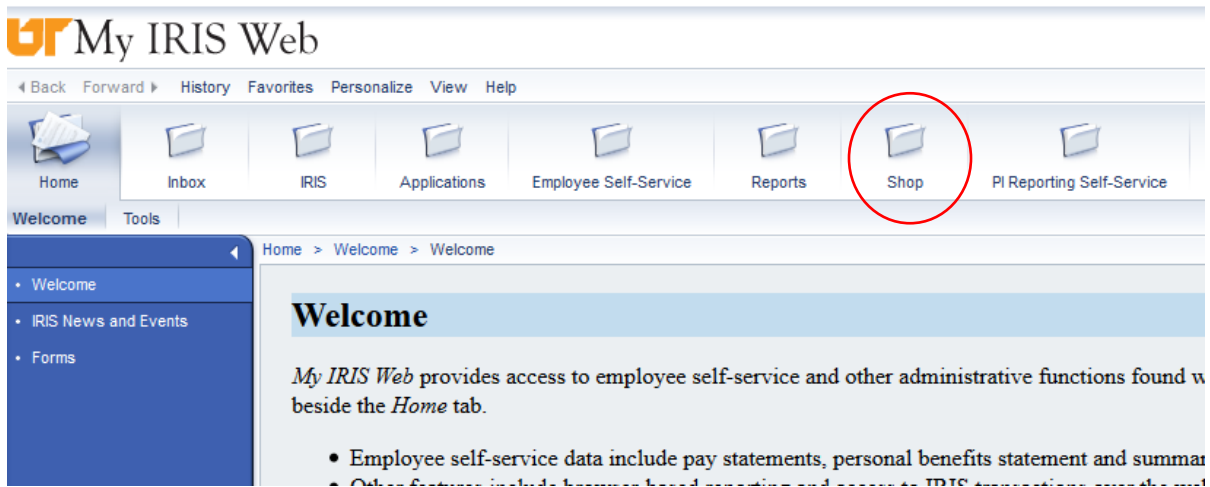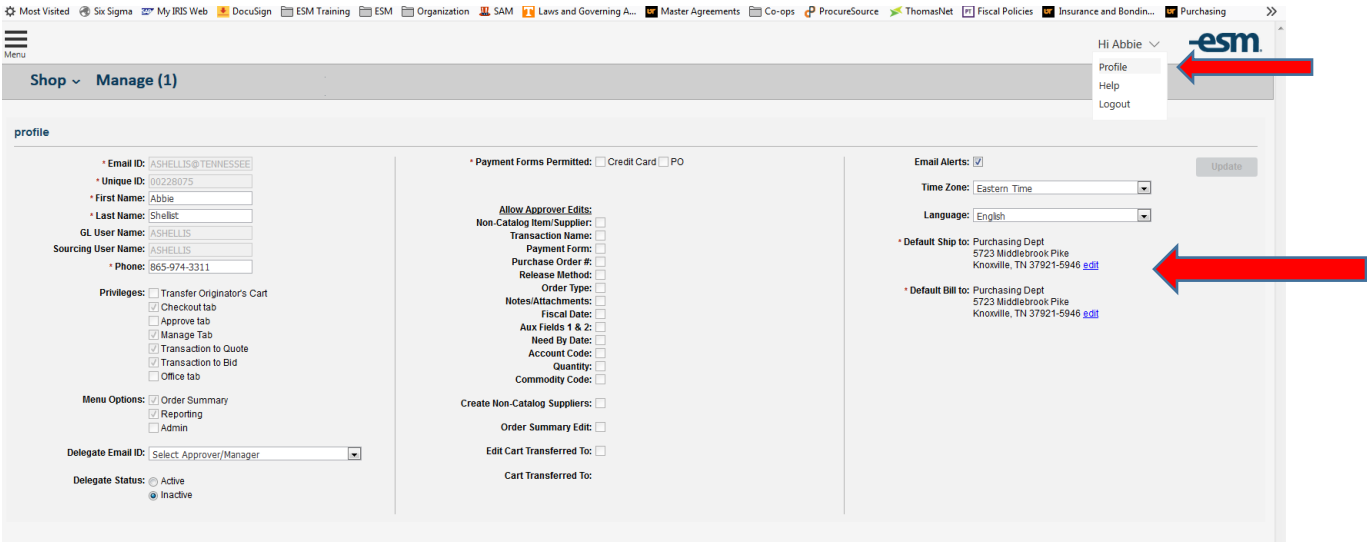Next to your name in the right hand corner of the screen there is a dropdown arrow. Click on **Profile** and you will see the default ship to address on the right side of page. Click **Edit**. Enter the first letters of department name. If address is there, select and click "update". Repeat for bill to address.

If department address is not found under default or is not correct:

Return to "Shop" page. Click on "Add or Update Bill to and Ship to Address". Complete all fields and click "Submit".
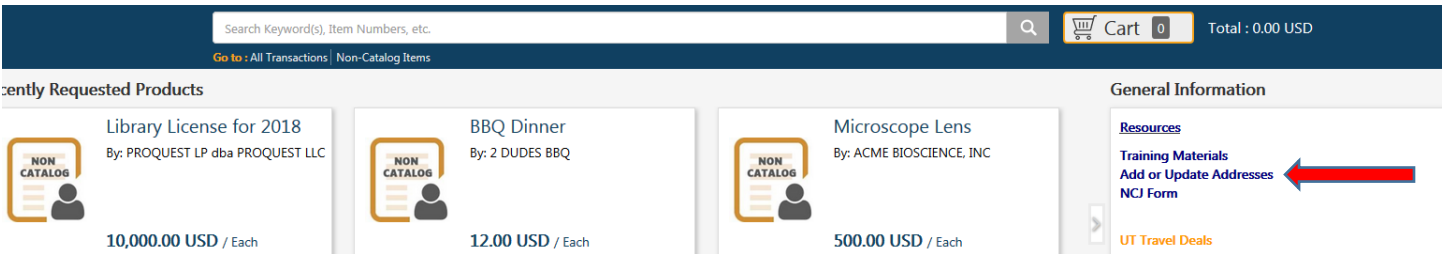
An email notification will be sent to you when addresses have been added or updated. After receiving this email notification, return the Menu → Profile to set your address as default.

Non-Catalog Orders (Requisition)

Click on non-catalog items under the search bar to begin a requisition.

Selecting a Supplier

When you click on non-catalog item you **must** enter supplier's name in the supplier field. You may type in the entire supplier name or a portion of the name. ==You cannot search by vendor number==.

If you are entering a requisition to initiate a bid, you may use "unknown" as the vendor if you do not have a vendor in mind or you can enter the vendor name for your suggested source.

If your requisition is an NCJ, informal bid, under the bid limit, or to create a PO based on another agreement (TBR, State, or cooperative agreement), you should enter the correct supplier's name in this field.

If you do not find the supplier you are looking for, please request a new vendor number in IRIS using transaction ZXK1. Once you are notified that a vendor number has been created in IRIS, the new vendor number will not be active in ESM until the next day.

*NOTE: ESM **does not** allow you to search suppliers by vendor number. You must search by supplier name. The column named GL Code is actually the vendor number for the supplier. This allows you to check for accuracy if there are multiple suppliers with the same name and you know the correct vendor number*

When you have found the correct supplier, click on the **select** button.

Adding Line Items

Begin entering the details of your requisition. The required fields are all noted by a red asterisk and you will not be able to move to the next step unless you provide all of the required information.

Required Fields

Order Types

Select from the order type drop-down menu.

Item/Service

This field is for a *brief* description and will allow only 68 characters. Once you get to the next step in the requisition, you will have additional space to include more details in the notes and attachments.

UOM (Unit of Measure)

This stands for unit of measure and if you click on the dropdown menu, your choices will appear. Please select from the one that best suits your needs.
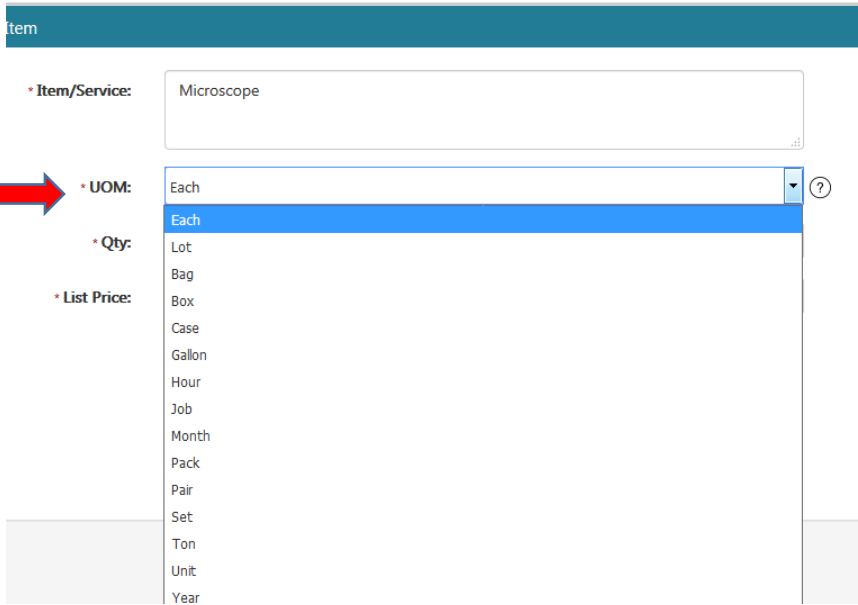
Quantity

Enter the quantity in whole numbers for the items you need to purchase.

*Please note that you **cannot** enter a partial quantity (for example 1.5 tons)*

List Price

Enter the list price. This can be an estimate if it is something we will be bidding for you.

*Please note that you **cannot** use a comma in the price.*

No-cost/Zero Dollar Item

The system will not allow you to enter a zero in the price field. If you need to enter a line item where the item will have no cost, enter .01 and add a note to that line item explaining the item will actually be no-cost. This will allow the buyer to modify the resulting PO to reflect a no-cost item.

Non-Required Fields

These fields are not required but if you have this information and it would be helpful in the procurement of the goods you need to purchase, please include it.

MFG/Provider:		
MFG/Provider Part #:		
Catalog Item #:		
UPC:		
CAS Number:		

When you have completed the required fields, click on add to cart.

Repeat this process for every line item you wish to add. Once you have finished adding all of your items, click on **cart**.

From the cart, you have the opportunity to change the quantity if you need to. It give you an overview of the items and the price.

Adding Line Items when Transaction is Already in Checkout

Once your transaction is in checkout, you will notice you cannot add line items. Please follow these steps for adding additional lines to a transaction in the checkout:

1. While your transaction in the cart, go back to **non-catalog items**

2. Enter the supplier name of the same supplier as your transaction you want to add items to

3. Fill in all the required information for the item and add to cart.

4. Now when you click on your cart, you will see the added line items and you can proceed to checkout.

Checkout

When you are ready to proceed, click on checkout.

A new window will pop up asking if you wish to continue.

General Details

Order Type

The first step in completing the requisition header is to select the order type. The default is just a dash that will require you to make a selection. You will see a dropdown arrow which will show you your order type options.

1. Standard Order- one time purchase and is **encumbered**
2. Informal Bid- 3 bids attached: If your department is authorized to do informal bidding you may select this order type- one time purchase and is **encumbered**
3. Framework Order- multiple purchases over a period of time and is **unencumbered**
4. NCJ Standard- Attach NCJ Form- one time purchase and is **unencumbered**
5. NCJ Framework Order- Attach NCJ Form – multiple purchases over a period of time and is **unencumbered**

Purchase Order

This is a number assigned by the system and cannot be changed. Once your requisition is converted into a purchase order, the actual PO number (either beginning with a 45 or a 55) will populate this field.

Delivery Date

This field is not required but if you have a date that you would like delivery to occur, please fill this out.

User Group

This field is for the **procurement office only** and is not able to be changed.

Procurement Only

This filed is for the procurement office only. Please **do not** make a selection here.

Work Order

Work Order # is an optional field and it is for your own internal use. The work order field does not show up on the purchase order.

Asset

This is a required field to which you will answer yes or no.

After you have completed the order type and asset questions, click continue.

Delivery Details

Ship to-Attn: This is a required field so you will need to enter someone's name (it will default to your own name) or if you do not want a name in this field, enter an exclamation point.

If you have used other delivery addresses in the past, you will see those as an option for you to select under **Recently Used Locations**.

Billing Details

Repeat the instructions for the shipping details for billing details. You can have the invoice sent to the attention of someone specific if you choose. Otherwise, put in an exclamation point.

GL Details

You will have the ability to assign an account number to the entire requisition or you can split the transaction between multiple accounts at either the header level or the line item level.

If you chose to enter the account information at the header level, that account number and GL code will apply to all the line items in your transaction.

If each line item should have a different GL code, you will want to apply the account and GL information at the line item level. All transactions require a GL code.

If you have entered account numbers for previous requisitions, you should see those in the dropdown menu in the Account Code/Favorite search field. If you select a favorite that does not have a GL code attached to it, <mark>you must also enter the GL code</mark>.

If this is your first requisition or you want to use a fund other than one that is in your favorites, click on the **+** sign and enter the account number in the fund field. Select the one you need.

You will need to enter the fund (account number) and a GL code and click apply.

When you enter the GL code, you will see it pop up in blue underneath the search field. You will need to click on the GL code highlighted in blue and click apply.

Favorites

To make an account a favorite, you will need to click on the start next to the account number.

Chart	Index	Account Code	Description	USD Split	% Split	Action
UT		E010120-U013610020-439100	OFF EQUITY&DIVERSITY-Office of equity & diversity - OPERATING SUPPLIES	6000.00	50.00	🗑 ⭐

If you made a mistake and want to remove an account number, click on the trash can.

Splitting Accounts

You can split the transaction among multiple account numbers. This can be done at the header or line item level. After you have entered your first account number, click the + sign to add another. Be sure to include the appropriate GL code.

Add as many accounts as you need to.

At the header level, you can only split accounts by percentage.

At the line item level, you can split by percentage or by dollar amount. Once you are finished, click update.

Line Item Details

At line item details you can change the quantity, add internal and external notes and attachments, select if it is an asset or not, add a delivery date, change the ship to attention, change an account number or GL code.

To do your account assignment by line item, click on **Line Item Details**. If you click on more, you will be able to adjust the item details and GL details.

If you click on more, you will be able to adjust the **Item details** and **GL details.**

Microscope

Supplier Name: ACME BIOSCIENCE, INC
Catalog Item #:

| Item Details | GL Details |

* Ship To – Attn:	Abbie Shellist		Price:	12,000.00 / Each
Procurement Only:	Select Commodity Code		* Qty:	1
Work Order #:			Item Subtotal:	12,000.00
* Asset >= $4,999.99?:	No		Item Total (USD):	12,000.00
Delivery Date:				

Update

When you click on GL Details, you will be able to change the account number or add an account for a split by clicking on the **+**, enter the required information and click apply.

Microscope

Supplier Name: ACME BIOSCIENCE, INC
Catalog Item #:

| Item Details | GL Details |

* Account Code/Favorite

Select Account Code   ⌄ (+)

* Chart of Accounts:	UT ⌄
Index Code:	Select Index ⌄
* Fund:	E010113010-U013610013 - Councils & Commissions-Vice Chancellor for Diversity ⌄
General Ledger:	434398 - ELECTRICITY USER CD 98 ⌄
Internal Orders:	Search/Select ⌄

Apply   Cancel

Notes and Attachments

These fields allow you to add a note or an attachment for **internal** purposes (to the buyer) or for **external** purposes (to the prospective bidders). Here is an example of an external note, which will be transmitted in the bid document and resulting PO. Internal notes could contain specifications or directions to the buyer. External notes are anything that you would want to be visible in the bid or resulting purchase order.

You can add a note or an attachment at the **header level** (which affects the entire requisition) or you can add notes and attachments at the **line item level** if they just pertain to that one line item. To add them at the header level, do it here:

If you want to add them at the line item level, click on the line item details tab.

The "header" is basically the front page of the requisition. Under transaction summary and transaction name, you will see notes and attachments, both for internal use and external use.

Header level notes and attachments

The header is the place where you would want to attach the NCJ form, quotes, specifications for a bid or any other documents intended for the Purchasing office.

You can add Word documents, PDFs, jpgs or Excel files as attachments.

==Please attach any relevant information that is needed to complete the transaction. These types of attachments include detailed specifications, quotes, invoices, etc.==

Please note: you are limited to 5 external attachments and 5 internal attachments for a total of 10 attachments.

Adding Notes

When you click on the note icon, a separate window will open and you can enter your notes here. And click update. You will see all notes have a date and time stamp.

Adding Attachments

Click on the paperclip icon to add an attachment. A window will pop up and you can choose the file you want to upload. Once you have selected the file, click update.

You can now see the attachment I have added.

Uploaded Attachments

Delete	File Name		File Size	Uploaded Date
☐	2017_Shellist_Abbie.doc		125.00 KB	02/06/2018 12:48

(Attachments will not be sent to suppliers who receive transactions via POXML)

Choose file

[Update] [Delete] [Cancel]

Uploaded Attachments

Delete	File Name	File Size	Uploaded Date
☐	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:48
☐	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:49
☐	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:49
☐	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:49
☐	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:50

Choose file

(Attachments will not be sent to suppliers who receive transactions via POXML)

Maximum 5 files can be uploaded at note level.

[Update] [Delete] [Cancel]

You will notice that when a note or attachment has been added, the notes and attachment icons will turn from black to blue.

Notes and Attachments

Internal Note 📄 📎   External Note 📄 📎

This indicates there are both internal notes and attachments added to this requisition.

Adding Notes and Attachments at Line Item Level

Click on Line Item Details. You will see all of your line items and a place for notes and attachments for each line item. Follow the same process for adding notes/attachments at the header level.

Transaction Name

Under the Transaction Summary box you will see the Transaction Name. This field is populated with is a system-generated name including the date, time stamp, and the last name of the person who entered the requisition. You can edit this field by typing in a new transaction name and clicking Update.

You can change the name of the transaction and click update.

Discounts and Trade-Ins

If you are creating a requisition that will include a discount, each line item should account for the discount. If the list price is $5,000 with a 20% discount you should enter the price as $4,000.

If you have a trade-in, you should create a line item that says trade-in and list a negative dollar value.

When creating a line item for a trade-in, departments will: select "No" on the Asset question.

In the Account Assignment "details" departments must enter their cost center & GL Code 439100. The major equipment GL Codes beginning with 46....00 or 439400 for sensitive minor equipment should not be used. Doing so will cause problems when paying the invoice in MIR7.

Submitting Your Transaction

After you have filled in all the required information, you will see green check marks next to each section.

If you have no more changes to make, you are ready to request approval or forward to someone else for review.

To forward, you will enter the name of the person you want to forward it to and click continue.

Requesting approval: you will get a pop up window that asks if you are sure you want to submit the transaction.

This step checks the fund and makes sure you have access to it. If so, you will see the workflow details open which shows the various workflow steps and who is able to approve. The status will tell you where your transaction is in the process. Active means it is at that step for approval. Once it is approved, you will see the status change to approved with a date and time stamp next to the name of the person who approved.

Workflow Name	Approver Name	Status
Approver U170007035	Mark A Paganelli	Active - 02/06/2018 13:19 ET
	OR Cindy Stockdale	Active - 02/06/2018 13:19 ET
	OR Jody T Huff	Active - 02/06/2018 13:19 ET
	OR Jennifer K. Lane	Active - 02/06/2018 13:19 ET
	OR Robert C Chance	Active - 02/06/2018 13:19 ET
	OR Susan Bevelhimer	Active - 02/06/2018 13:19 ET
	OR Timothy F Mapes	Active - 02/06/2018 13:19 ET
	OR Abbie Shellist	Active - 02/06/2018 13:19 ET
	OR Blake Reagan	Active - 02/06/2018 13:19 ET
Purch Standard UTK	David E Marks	Pending
	OR Jack Walker	Pending
	OR Blake Reagan	Pending
	OR Lisa R Pate	Pending
	OR Amy Dudenbostel	Pending
	OR Casey Carrigan	Pending
	OR Abbie Shellist	Pending

Main Market Place Page

Recently Requested Products

At the top of the Market Place you will see "recently requested products." If you purchase certain products regularly, you can insert a quantity and click "add to cart."

Next Click on the cart icon to access your item summary and you are ready to proceed to checkout.

The information that you entered the last time you purchased this product will auto populate but you can go in and make changes if you need to.

Recent Transactions

From the main Market Place page, you can see your recent transactions. You can click on view to see the transaction in its entirety.

General Information

Here you will find a link to training material, the NCJ form and the add/update address form.

Pending Transactions

If you have transactions that are still unsubmitted, you will find then here. You can click on the blue name of the transaction and it will take you to the transaction.

Alerts

In the transaction summary field you will see any alerts in the system note field. If you see an alert, just click on it and it will open a note with an explanation for the alert. In this case, I have not included a GL code.

System Note   ✕

02/06/2018 13:10 ET

Transaction Validation: Non Catalog G/L Validation Rule
Validation Message:
G/L Code Required - Please Enter G/L Code

Close

Sole Source/NCJ (Non-Competitive Justification)

The NCJ and requisition are a single transaction. In order to submit an NCJ you will need to select one of two options in the order type drop-down menu:

NCJ- Standard

NCJ- Framework

If you are making a one-time purchase, you will select NCJ-Standard and if you need a PO that will allow multiple purchases over a period of time, you will select NCJ- Framework.

In order to process an NCJ you will need to fill out the NCJ form and attach it to the requisition under "internal attachments." The attachment will allow you to select "new NCJ" or "amendment NCJ."

In either case you will need to fill out the NCJ form (found on the main Market Place page under resources) and attach it as an internal attachment at the header level, not line item level.

Attach the NCJ form and any supporting documents in the internal attachments at the header level.

Checkout

General Details

Payment Form: ● PO	Delivery Date: [ ] 📅
Order Type: [- ▼]	User Group: [Unassigned ▼]
Purchase Order #: [3482]	Procurement Only: [Select Commodity Code ▼] ⑦
Fiscal Date: [05/01/2018]	Work Order: [ ]
	* Asset > $4,999.99?: [Select Auxiliary Field2 ▼]

[Continue]

● Delivery Details	Attn : Abbie Shellist	Location : Purchasing Department-Knoxville	Change
● Billing Details	Attn : EDIT USER	Location : UT TEST LOCATION - IMPORT	Change
GL Details			Change
Line Item Details (Total: 1)			Change
Workflow Details			Change

Transaction Summary

Transaction #: 101514
Create Date: 05/01/2018
Supplier: ACME BLOCK & BRICK
Requester: Abbie Shellist
Selection: Active
Status: Unsubmitted Transaction
System Note: None

Total Line Items:	1
Subtotal:	100,000.00
Total Value (USD):	100,000.00

Transaction Name

[05/01/2018 11:11-Shellist-ACME BLOCK & BRIC] [Update]

Notes and Attachments

Internal Note 📄📄   External Note 📄📄

THE UNIVERSITY OF TENNESSEE

Purchase Requisition
Non-Competitive Justification

Complete all that apply:

☐ New Purchase　　　　☐ Amendment to an existing purchase order

Original Start Date: ▢ _____　　Amendment Start Date: ▢ _____

Original End Date: ▢ _____　　Amendment End Date: ▢ _____

Original Amount: ▢ _____　　Amendment Amount: ▢ _____

Total Amount with ALL
Amendments: ▢ _____　　Previous PO #: ▢ _____

Explain in detail why the University should use Non-Competitive negotiation rather than a competitive process –
▢

Approval Notes:

▢

Informal Bids

If your department is authorized to conduct bids under $50,000, select "Informal Bid- 3 Bids Attached" in the order selection field. You are required to attach all of the bid documents to the requisition in **internal attachments**.

Searching Transactions

You can search for transactions in two ways.

1. You can click on go to: All Transactions and filter by a variety of options. You can filter by active, waiting, hold, archive, submitted, received, and all.

You can filter by active, waiting, hold, archive, submitted, received, and all.

You can choose a time frame to show

You can sort by recently added, account number, create date, PO #, recently added, status, supplier A-Z, supplier Z-A, transaction number and transaction name.

Or you can enter the transaction number or PO number into the search bar.

2. The other way to search is by selecting "order summary" from the meu.

Here you can search by a wider variety of options

Rejected Requisitions

When someone in the approval workflow rejects your requisition, it will show up in your Pending Transactions. You will see it says approval rejected.

Click on the internal note icon and the note window will pop up and you can read the rejection reason

Internal Note   ✕

```
02/06/2018 15:12 ET Abbie Shellist -
02/06/2018 15:10 ET Abbie Shellist - Rejection Reason: Please change the order type and resubmit
02/06/2018 12:45 ET Abbie Shellist - Please make sure these all ship at one time.
```

[Update]   [Cancel]

You will need to request again to send it back through workflow

Search Keyword(s), Item Numbers, etc.		🔍	🛒 Cart 0	Total : 0.00 USD

Go to : All Transactions | Non-Catalog Items

Pending Transaction(s)   1 Transaction(s) from Recent Cart   Click on Transaction Name to complete the Checkout process

NEW 02/06/2018 14:15-Shellist-ACME BLOCK...	**Total Line Items:** 1	**Total Value:** 15,000.00 USD	**Create Date:** 02/06/2018	
Transaction #: 94357	**PO #:** 2066	**Supplier:** ACME BLOCK & BRICK	**Requester:** Abbie Shellist	Unsubmitted Transaction

Hide 3 other Pending Transaction(s)

02/02/2018 11:02-Shellist-ACME BIOSCI...	**Total Line Items:** 8	**Total Value:** 60,500.00 USD	**Create Date:** 02/02/2018	
Transaction #: 94064	**PO #:** 2062	**Supplier:** ACME BIOSCIENCE, INC	**Requester:** Abbie Shellist	Approval Rejected

Click on the name of the transaction and the requisition will open and allow you to make changes.
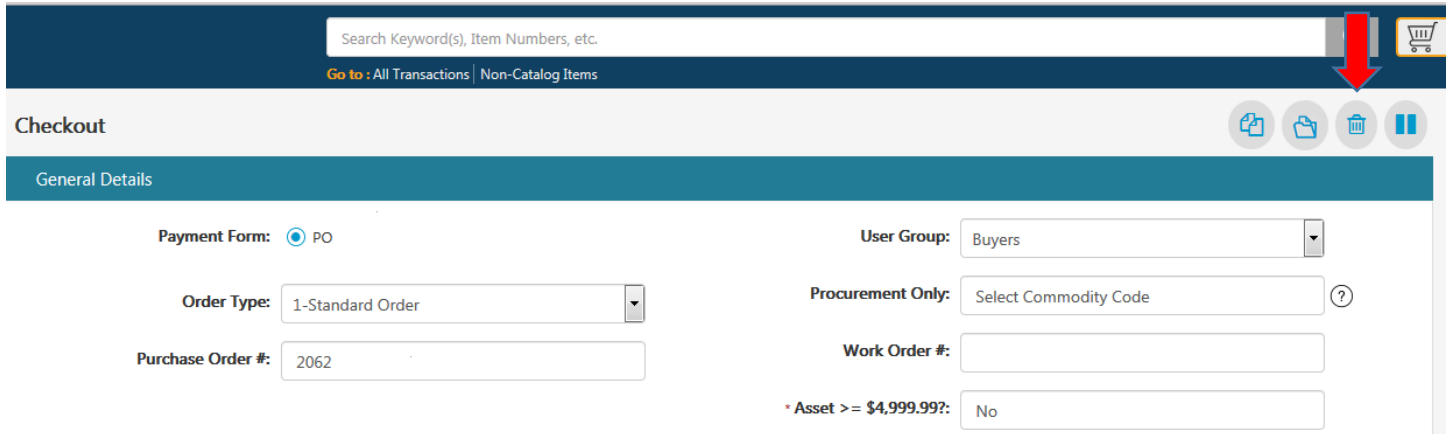
1. Make your changes and click on Request Approval and this will go back through workflow for approval

[Forward]   [Request Approval]

Deleting a Transaction

If you need to delete a transaction whether before it goes through workflow for approval or if it has been rejected to you, click on the trashcan icon at the top of the checkout page.

Checking Workflow

To check the workflow of a transaction you have submitted, go to All Transactions or search for your transaction number in the search transaction or PO field.

Click on the name of the transaction in question and then click on workflow details. In this case you can see it was approved

Copying a Transaction

First you will need to look up the transaction you would like to copy. Go to All Transactions and then enter the transaction number or PO number into the search bar and click the search icon.
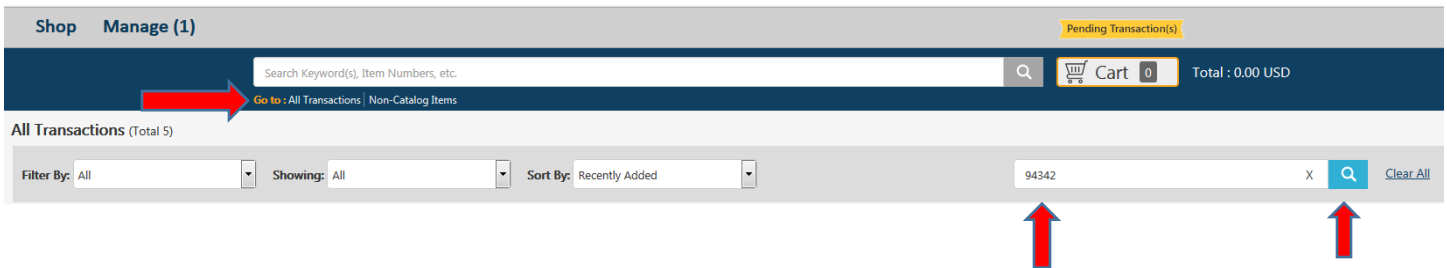
Click on the name of the transaction which will be in blue. This will open your old transaction.
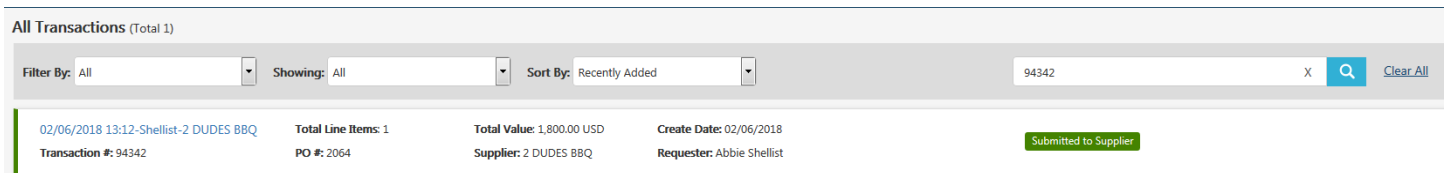
Click on the copy icon (two pieces of paper) and you will be asked if you want to copy your transaction.
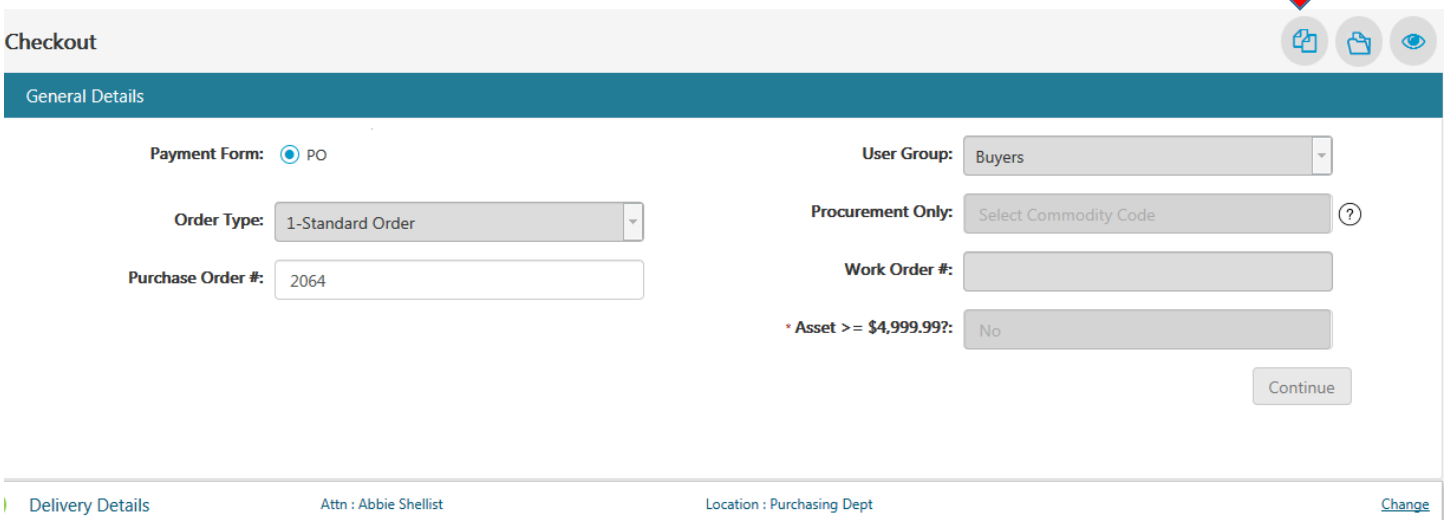
Click "yes"
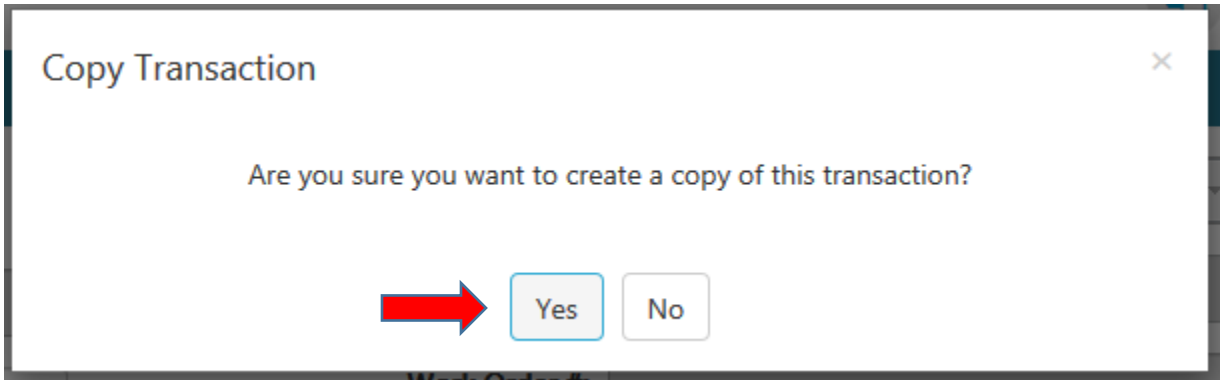
You will now see that the transaction name says copy. You can change the name of this transaction by clicking into the transaction name field and clicking update.

Now you are able to make changes to this new, copied transaction and submit.

You are able to change the following fields in the copy:

1) Order type
2) Transaction name
3) Attachments
4) Asset, yes or no
5) Ship to
6) Account information
7) Quantity
8) Price

If you want to add a line item to the copied requisition, you will need to go back to the non-catalog items and follow the steps of entering a new requisition by selecting the same supplier as the copied requisition.

Additional Functions

For unsubmitted transactions, you can copy, delete or put the transaction on hold.
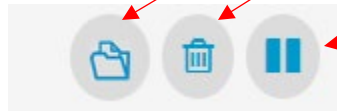
Once you request approval on the transaction, it will no longer be on hold.

If a transaction has already had a PO created, you will see "submitted to supplier" next to the transaction. If you click on the transaction you will be able to copy, archive, or view the PO.

Paying an Invoice

You will receive a copy of the finalized purchase order via email. You will continue to make payments in IRIS against the purchase order.   Go to:

IRIS transaction MIR7

Enter the required information on the Basic Data Tab

Transaction	Invoice		
Basic Data	Payment	Details	Tax	Withholding tax	Contacts	Note

Invoice date		Reference	
Posting Date	07/18/2017		
Amount			☐ Calculate tax
Tax amount		E0 (A/P sales tax, 0%) ▼	
Text			
Company Code	UT University of Tennessee		
Lot No.			

Enter the purchase order number in the Purchase Order/Scheduling Agreement box (hit enter)

PO Reference

Purchase Order/Scheduling Agreement	▼	5500007098		🗗

	Item	Amount	Quantity	O...		Purchase O...	Item	PO Text
	1	0.00			☐	5500007098	1	Professiona

Highlight the line item you are paying against >> go the account assignment box >> enter applicable account information

PO Reference

| Purchase Order/Scheduling Agreement	▼	5500007098		🗗		Goods/service items	▼
					Layout	All information	▼

Item	PO Text	Tax Code	N...	A	Acct Assgt	Edit Own C...	Edit Vendor...	S
1	Professional Soft Skills Customizable	E0 (A/P sales tax.. ▼	☐	U	🗗	🖩		

Enter applicable account information >> click on the Check button >> Back button (if you are paying against a purchase order beginning with a 45, the below boxes will be populated with purchase order information, on purchase orders beginning with a 55 you to type in the account information).


On the "Payment Tab" (at the top) >> enter the applicable payee number. If the "1" vendor number used on the purchase order is not linked a "2" vendor number there will be no "2" vendor numbers to choose from, payment will go to the address shown on the purchase order.

On the "Details Tab" (at the top) >> any shipping costs in which there is no line item, may be entered in the "Unpl. Del. Csts." Box

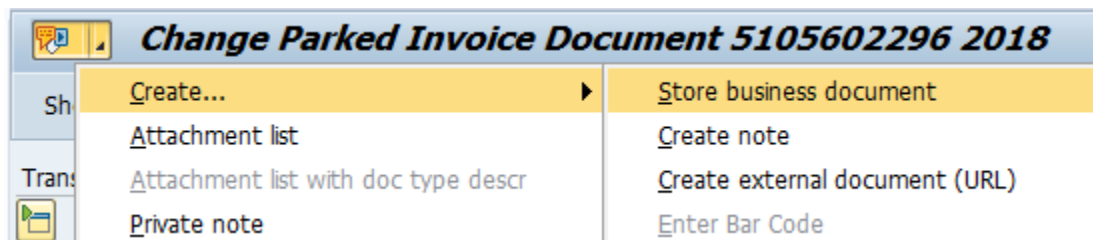From the Main Menu Bar, select "Invoice Document" and "Save Parked Document."
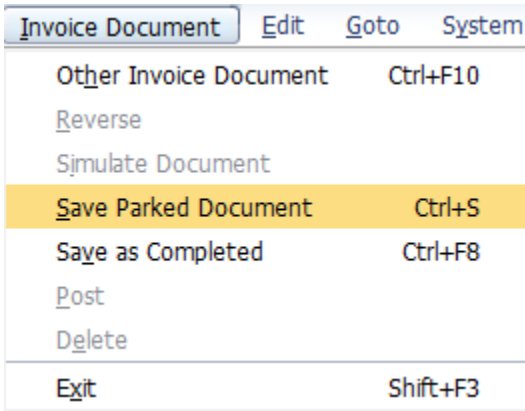
Open the parked document for changes by double clicking on it in the "parked" folder in the worklist.
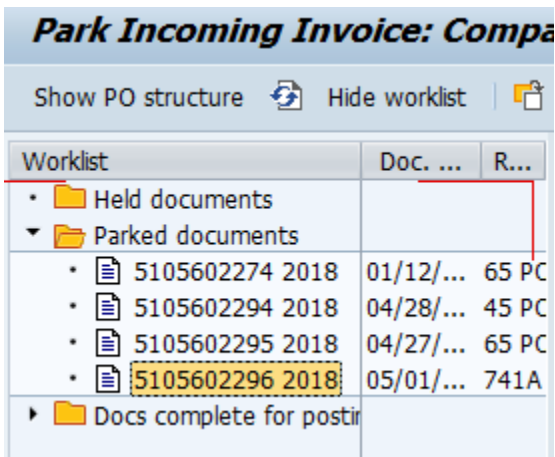

Click the "Services for Object" button.

Select "Create > Store Business Document" to attach the invoice and any supporting documentation.

Click on "Save as Completed" button at the top.