

Requisition Instructions

New User Interface

Version 1.2

5/1/2018

Contents

Logging in to ESM	3
Setting Default Ship-To and Bill-To Address	5
Non-Catalog Orders (Requisition)	6
Selecting a Supplier	6
Adding Line Items	8
Required Fields	8
Item/Service	8
UOM (Unit of Measure)	8
Quantity	9
List Price	9
Non-Required Fields	9
Adding Line Items when Transaction is Already in Checkout	10
Checkout	12
General Details	13
Order Type	13
Purchase Order #	14
Delivery Date	14
User Group	14
Procurement Only	14
Work Order #	14
Asset	14
Delivery Details	15
Billing Details	15
GL Details	16
Favorites	17
Splitting Accounts	18
Line Item Details	19
Notes and Attachments	21
Adding Notes	22
Adding Attachments	22
Adding Notes and Attachments at Line Item Level	24
Transaction Name	24


Discounts and Trade-Ins.....	25
Submitting Your Transaction.....	25
Main Market Place Page	27
Recently Requested Products.....	27
Recent Transactions.....	28
General Information	28
Pending Transactions.....	29
Alerts	29
Sole Source/NCJ (Non-Competitive Justification).....	30
Informal Bids.....	34
Searching Transactions.....	34
Rejected Requisitions.....	37
Deleting a Transaction	39
Checking Workflow	39
Copying a Transaction.....	40
Additional Functions	43
Paying an Invoice	44

Logging in to ESM

NOTE: Please do not use Internet Explorer as your browser. You may lose functionality or have issues viewing.

Using Mozilla Firefox or Google Chrome, log into My IRIS Web with your net ID and password.

<https://irisweb.tennessee.edu/irj/portal>



THE UNIVERSITY OF
TENNESSEE
KNOXVILLE

What is a UT NetID?

Forgot Your Password?

Need help signing in?

Current service alerts and outage

CENTRAL AUTHENTICATION SERVICE

To continue, please enter your NetID and password:

NetID:

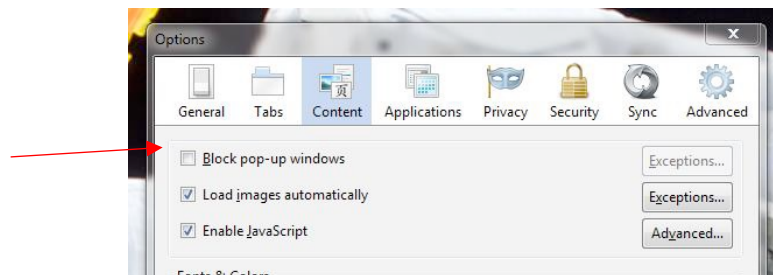
Password:

LOGIN

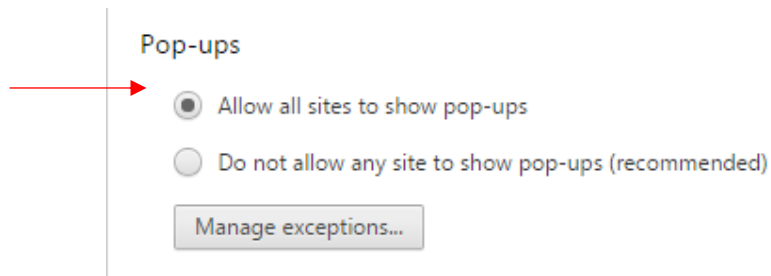
By logging in to this site, you agree to the terms of the [UT Acceptable Use Policy](#)

Disable all pop-up blockers for your web browser

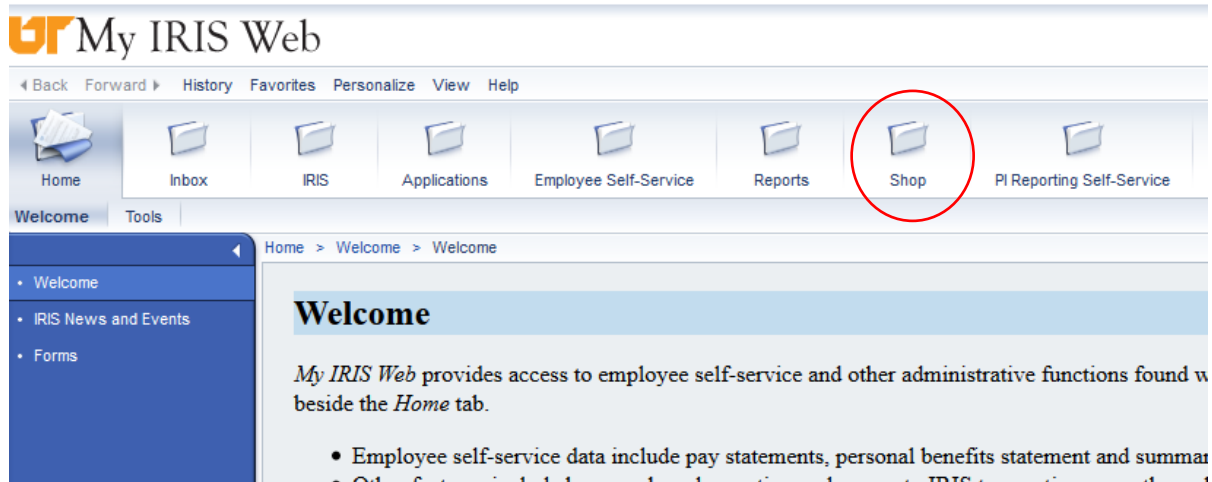
- For Mozilla Firefox:
 - Click on the “Firefox” drop down menu and select “Options”
 - Click on “Content” and uncheck the “Block pop-up windows” box



- 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 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.

The screenshot shows the ESM user profile page. The top navigation bar includes links like 'Most Visited', 'Six Sigma', 'My IRS Web', 'DocuSign', 'ESM Training', 'ESM', 'Organization', 'SAM', 'Laws and Governing A...', 'Master Agreements', 'Co-ops', 'ProcureSource', 'ThomasNet', 'Fiscal Policies', 'Insurance and Bondin...', and 'Purchasing'. The user's name 'Hi Abbie' is in the top right corner, with a dropdown menu showing 'Profile', 'Help', and 'Logout'. A red arrow points to the 'Profile' option. Below the navigation bar, the 'Shop' and 'Manage (1)' tabs are visible. The 'profile' section contains user information, payment forms, and email alerts. The 'Default Ship to' address is highlighted with a red arrow.

Hi Abbie ▾
Profile
Help
Logout

Shop ▾ Manage (1)

profile

Email ID: ASHELLIS@TENNESSEE
Unique ID: 00228075
First Name: Abbie
Last Name: Shellist
GL User Name: ASHELLIS
Sourcing User Name: ASHELLIS
Phone: 865-974-3311

Privileges: ☐ Transfer Originator's Cart
☒ Checkout tab
☐ Approve tab
☒ Manage Tab
☒ Transaction to Quote
☒ Transaction to Bid
☐ Office tab

Menu Options: ☒ Order Summary
☒ Reporting
☐ Admin

Delegate Email ID: Select Approver/Manager ▾

Delegate Status: ☐ Active
☒ Inactive

Payment Forms Permitted: ☐ Credit Card ☐ PO

Allow Approver Edit:
Non-Catalog Item/Supplier:
Transaction Name:
Payment Form:
Purchase Order #:
Release Method:
Order Type:
Notes/Attachments:
Fiscal Date:
Aux Fields 1 & 2:
Need By Date:
Account Code:
Quantity:
Commodity Code:

Create Non-Catalog Suppliers:
Order Summary Edit:
Edit Cart Transferred To:
Cart Transferred To:

Email Alerts: ☒
Time Zone: Eastern Time
Language: English

Default Ship to: Purchasing Dept
9723 Middlebrook Pike
Knoxville, TN 37921-5946 [edit](#)

Default Bill to: Purchasing Dept
9723 Middlebrook Pike
Knoxville, TN 37921-5946 [edit](#)

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”.

The screenshot shows the ESM Shop page. The top navigation bar includes a search bar, a cart icon, and a total amount of 0.00 USD. Below the navigation bar, the 'Recently Requested Products' section displays three items: 'Library License for 2018', 'BBQ Dinner', and 'Microscope Lens'. The 'General Information' section on the right contains links for 'Resources', 'Training Materials', 'Add or Update Addresses', and 'NCJ Form'. A red arrow points to the 'Add or Update Addresses' link.

Search Keyword(s), Item Numbers, etc.

Go to: All Transactions | Non-Catalog Items

Library License for 2018
By: PROQUEST LP dba PROQUEST LLC
10,000.00 USD / Each

BBQ Dinner
By: 2 DUDES BBQ
12.00 USD / Each

Microscope Lens
By: ACME BIOSCIENCE, INC
500.00 USD / Each

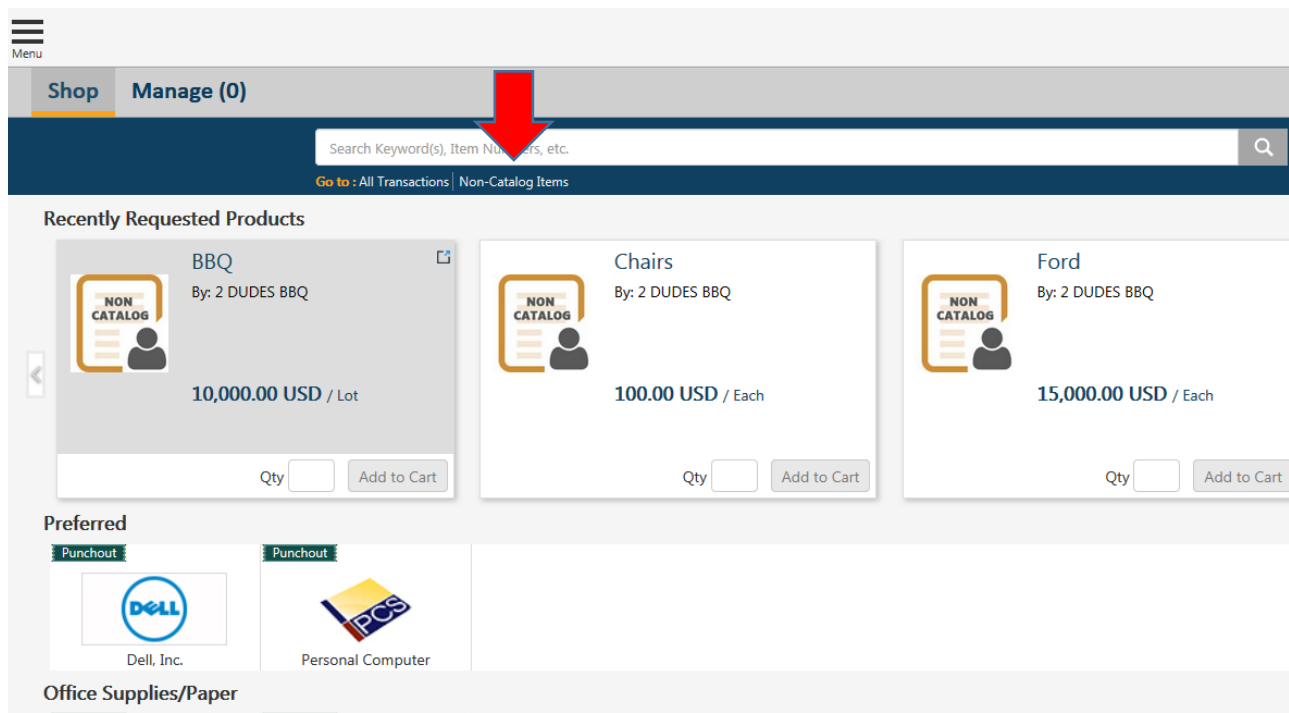
General Information

Resources
Training Materials
Add or Update Addresses
NCJ Form

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

ShopManage (0)

Search Keyword(s), Item Numbers, etc.

Q

Cart 0

Total : 0.00 USD

[Go to : All Transactions](#) | [Non-Catalog Items](#)

New Non-Catalog Item

To add a non-catalog item you need to select the supplier first.

1. Select Supplier:

acmeXQ17 record(s) found

Supplier Name	GL Code	Address	Contact Name	Contact Email / PO Email	Contact Phone	Action
ACME BIOSCIENCE, INC	1082471	101 INDUSTRIAL WAY, SUITE 7 BELMONT, CA, 94002, United States	Order Department		865-555-1212	Select
ACME BLOCK & BRICK	1022880	248 DAYTON SPUR ROAD CROSSVILLE, TN, 38555, United States	Order Department		865-555-1212	Select
ACME BLOCK & BRICK INC	1022468	248 DAYTON SPUR ROAD CROSSVILLE, TN, 38571, United States	Order Department		865-555-1212	Select

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

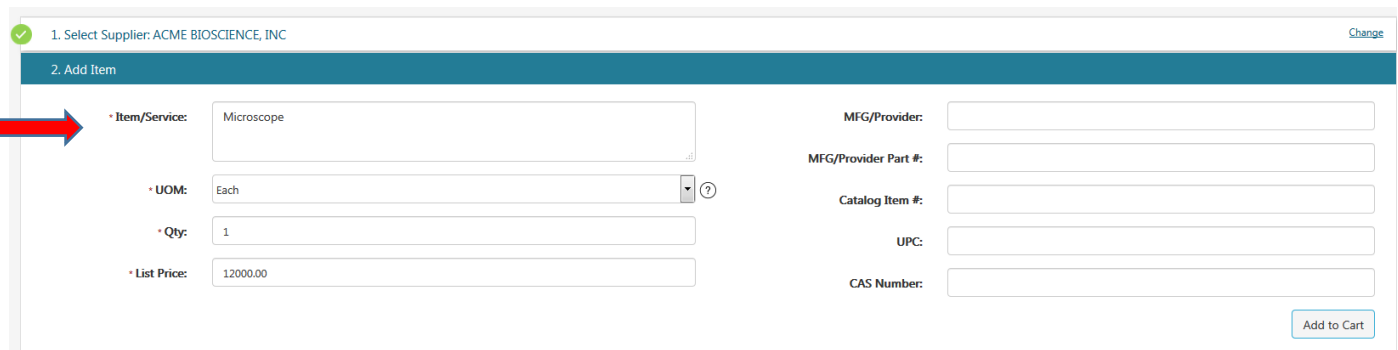
Adding Line Items

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

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.



1. Select Supplier: ACME BIOSCIENCE, INC [Change](#)

2. Add Item

* Item/Service:

* UOM: ?

* Qty:

* List Price:

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

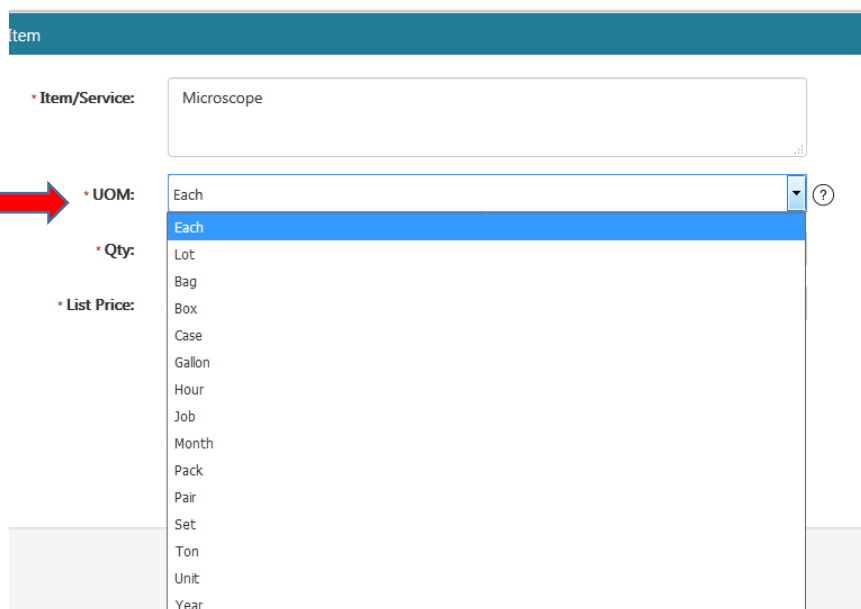
UPC:

CAS Number:

[Add to Cart](#)

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.



Item

* Item/Service:

* UOM: ?

* Qty:

* List Price:

- Each
- Lot
- Bag
- Box
- Case
- Gallon
- Hour
- Job
- Month
- Pack
- Pair
- Set
- Ton
- Unit
- Year

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.*

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.

1. Select Supplier: ACME BIOSCIENCE, INC

Change

2. Add Item

* Item/Service:

Microscope

* UOM:

Each

?

* Qty:

1

* List Price:

12000.00

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

UPC:

CAS Number:

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**.



Shop Manage (0)

Search Keyword(s), Item Numbers, etc.

Go to: All Transactions | Non-Catalog Items

New Non-Catalog Item
To add a non-catalog item you need to select the supplier first.

1. Select Supplier: ACME BIOSCIENCE, INC [Change](#)

2. Add Item

Item/Service:

UOM: Each

Qty:

List Price: 0.00

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

UPC:

CAS Number:

[Add to 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**

Search Keyword(s), Item Numbers, etc.

Go to: All Transactions | Non-Catalog Items

Item Summary (2 Items)

Item Details	Quantity	Price (USD)	Subtotal (USD)
 Microscope Lens By: ACME BIOSCIENCE, INC Catalog Item #: Mfg/Provider:	1	500.00 / Each	500.00

Cart Summary

Total Items in Cart: 2

Number of Suppliers: 1

Cart Total (USD): 15,500.00

[Checkout](#)

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

Search Keyword(s), Item Numbers, etc.

Go to: All Transactions | Non-Catalog Items

New Non-Catalog Item
To add a non-catalog item you need to select the supplier first.

1. Select Supplier:

Acme Bioscience X

No suppliers found

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

1. Select Supplier: ACME BIOSCIENCE, INC

2. Add Item

* Item/Service: 12 Month Service Contract

* UOM: Each

* Qty: 1

* List Price: 1500

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

UPC:

CAS Number:

Change

Add to Cart


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

Item Summary (3 Items)				Cart Summary	
Item Details	Quantity	Price (USD)	Subtotal (USD)		
<div>NON CATALOG</div> <div>Microscope Lens By: ACME BIOSCIENCE, INC Catalog Item #: Mfg/Provider:</div>	1	500.00 / Each	500.00	Total Items in Cart: 3	
<div>NON CATALOG</div> <div>Microscope By: ACME BIOSCIENCE, INC Catalog Item #: Mfg/Provider:</div>	1	15,000.00 / Each	15,000.00	Number of Suppliers: 1	
<div>NON CATALOG</div> <div>12 Month Service Contract By: ACME BIOSCIENCE, INC Catalog Item #: Mfg/Provider:</div>	1	1,500.00 / Each	1,500.00	Cart Total (USD): 17,000.00	
				Checkout	

Checkout

When you are ready to proceed, click on checkout.

The screenshot shows the eSM Shop interface. At the top, there's a header with a menu icon, the text 'Hi Abbie', and the eSM logo. Below the header, there's a navigation bar with 'Shop' and 'Manage (0)'. A search bar is present with the placeholder text 'Search Keyword(s), Item Numbers, etc.'. To the right of the search bar, there's a cart icon with 'Cart 1' and a total price of 'Total : 12,000.00 USD'. Below the navigation bar, there's a section titled 'Item Summary (1 Items)'. It contains a table with columns: 'Item Details', 'Quantity', 'Price (USD)', and 'Subtotal (USD)'. The table has one row for a 'Microscope' by 'ACME BIOSCIENCE, INC.' with a quantity of 1 and a price of 12,000.00 / Each, resulting in a subtotal of 12,000.00. To the right of the table, there's a 'Cart Summary' box. It contains the following information: 'Total Items in Cart: 1', 'Number of Suppliers: 1', and 'Cart Total (USD): 12,000.00'. At the bottom of the 'Cart Summary' box is a yellow 'Checkout' button. A large red arrow points to this button.

Item Details	Quantity	Price (USD)	Subtotal (USD)
 Microscope By: ACME BIOSCIENCE, INC. Catalog Item #: Mfg/Provider:	1	12,000.00 / Each	12,000.00

Cart Summary

Total Items in Cart: 1
Number of Suppliers: 1
Cart Total (USD): 12,000.00

[Checkout](#)

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

Checkout



The cart will update 1 existing transaction(s)

Do you want to continue?

Yes

No

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.

Shop Manage (1) Pending Transaction(s)

Search Keyword(s), Item Numbers, etc.

Go to: All Transactions | Non-Catalog Items

Cart 0 Total: 0.00 USD

Checkout

General Details

Payment Form: ☒ PO

Order Type: -

Purchase Order #: 2067

User Group: Buyers

Procurement Only: Select Commodity Code

Work Order #:

* Asset >= \$4,999.99?: Select Auxiliary Field2

Continue

Transaction Summary

Transaction #: 94587

Create Date: 02/08/2018

Supplier: ACME BLOCK & BRICK

Requester: Abbie Shellist

Selection: Active

Status: Unsubmitted Transaction

System Note: None

Total Line Items: 1

Subtotal: 165,000.00

Total Value (USD): 165,000.00

Transaction Name

02/08/2018 09:40-Shellist-ACME BLOCK & BRIC Update

Notes and Attachments

Internal Note External Note

Delivery Details Attn: Abbie Shellist Location: Purchasing Dept Change

Billing Details Attn: Location: Purchasing Dept Change

GL Detail Change

Line Item Details (Total: 1) Change

Workflow Details Change

General Details

Payment Form: ☒ PO

Order Type: -

Purchase Order #:

- 1-Standard Order
- 2-Informal Bid-3 bids attached
- 3-Framework Order
- 4-Sole Source Standard-Attach NCJ Form
- 5-Sole Source Framework-Attach NCJ Form
-

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 field 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.


User Group:

Procurement Only: (?)

Work Order #:

* Asset >= \$4,999.99?:


☒ No
☐ Yes



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

General Details

Payment Form: <input checked="" type="radio"/> PO	User Group: <input type="text" value="Unassigned"/>
Order Type: <input type="text" value="1-Standard Order"/>	Procurement Only: <input type="text" value="Select Commodity Code"/> (?)
Purchase Order #: <input type="text" value="2059"/>	Work Order #: <input type="text"/>
	* Asset >= \$4,999.99?: <input type="text" value="No"/> ✕
	<input type="button" value="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.

The screenshot shows the 'Checkout' page with a 'Delivery Details' tab selected. A red arrow points to the 'Ship To - Attn:' field, which contains 'Abbie Shellist'. Below this, the 'Default Location' is 'Purchasing Dept' with contact information. The 'Recently Used Locations' section is empty. The 'Transaction Summary' on the right shows Transaction #: 93756, Create Date: 01/30/2018, Supplier: ACME BIOSCIENCE, INC, and a Subtotal of 12,000.00. The 'Transaction Name' is '01/30/2018 10:32-Shellist-ACME BIOSCIENCE, I'. The 'Notes and Attachments' section has buttons for 'Internal Note' and 'External Note'. At the bottom, there are 'Forward' and 'Request Approval' buttons.

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**.

This close-up shows the 'Delivery Details' section. The 'Ship To - Attn:' field is highlighted with a red arrow. Below it, the 'Default Location' is 'Purchasing Dept' with contact information. The 'Recently Used Locations' section shows a list of locations, including 'PURCHASING DEPARTMENT' with contact information. A 'Select' button is visible next to the 'PURCHASING DEPARTMENT' entry. A red arrow points to the 'Continue' button at the bottom right.

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, **you must also enter the GL code.**

Menu

Shop Manage (0)

Search Keyword(s), Item Numbers, etc.

Go to: All Transactions | Non-Catalog Items

Checkout

General Details [Change](#)

Delivery Details Attn : Location : PURCHASING DEPARTMENT [Change](#)

Billing Details Attn : Abbie Shellist Location : Purchasing Dept [Change](#)

GL Detail

Account Code/Favorite

Select Account Code

E010120-U013610020-439100 - OFF EQUITY&DIVERSITY-Office of equity & diversity-OPERATING SUPPLIES

Chart of Accounts: UT

Index Code: Select Index

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.

GL Detail

* Account Code/Favorite

Select Account Code

+

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

*** Account Code/Favorite**

Select Account Code ▼ ⊕

*** Chart of Accounts:** UT ▼

Index Code: Select Index ▼

*** Fund:** Search/Select ▼
This field is required

General Ledger: Search/Select ▼

Internal Orders: Search/Select ▼

Apply Cancel

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.

GL Detail

Account Code/Favorite

Select Account Code ▼ ⊕

*** Chart of Accounts:** UT ▼

Index Code: Select Index ▼

*** Fund:** E170145001-U170001045 - Data Operations-Treasurer ▼

General Ledger: 439100 ▼

Internal Orders: 439100 - OPERATING SUPPLIES ▼

Apply Cancel

Favorites

To make an account a favorite, you will need to click on the star 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.

Microscope

×



Supplier Name: ACME BIOSCIENCE, INC

Catalog Item #:

Item Details

GL Details

Item Split Details:

NOTE: Remaining USD / % Split must be 0.00 in order to apply account(s) to transaction

Chart	Index	Account Code	Description	USD Split	% Split	Action
UT		E010120- U013610020-439100	OFF EQUITY&DIVERSITY-Office of equity & diversity - OPERATING SUPPLIES	6000	50	
UT		E010113010- U013610013-434398	Councils & Commissions-Vice Chancellor for Diversity - ELECTRICITY USER CD 98	6000	50	
				Remaining:	0.00	0.00

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.

Checkout













✓ General Details

✓ Delivery Details

✓ Billing Details

✓ GL Detail

Line Item Details (Total: 7)

Item Details	* Quantity	Price	Subtotal	Tax	Item Total (USD)	
1  Microscope edit	<input type="text" value="1"/>	12,000.00 / Each	12,000.00	0.00	12,000.00	more... 
Notes and Attachments: Internal Note  External Note 						
2  Microscope Lens edit	<input type="text" value="1"/>	500.00 / Each	500.00	0.00	500.00	more... 
Notes and Attachments: Internal Note  External Note 						
3  Microscope edit	<input type="text" value="1"/>	15,000.00 / Each	15,000.00	0.00	15,000.00	more... 
Notes and Attachments: Internal Note  External Note 						

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



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.



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.

Checkout

General Details [Change](#)

Delivery Details Attn: Abbie Shellist Location: Purchasing Dept [Change](#)

Billing Details Attn: ! Location: Purchasing Dept [Change](#)

GL Detail

* Account Code/Favorite
See Item Details [+](#)

Item Split Details:
NOTE: Remaining USD / % Split must be 0.00 in order to apply account(s) to transaction

Chart	Index	Account Code	Description	USD Split	% Split	Action
			Remaining:	60,000.00	100.00	

[Continue](#)

Transaction Summary

Transaction #: 94064
Create Date: 02/02/2018
Supplier: ACME BIOSCIENCE, INC
Requester: Abbie Shellist
Selection: Active
Status: Pending Validation
System Note: None
Total Line Items: 7
Subtotal: 60,000.00
Total Value (USD): 60,000.00

Transaction Name
02/02/2018 11:02-Shellist-ACME BIOSCIENCE, IP [Update](#)

Notes and Attachments
Internal Note [+](#) External Note [+](#)

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.

Internal Note

02/06/2018 12:45 ET Abbie Shellist - Please make sure these all ship at one time.

Update

Cancel

[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.

Uploaded Attachments

Choose file

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

Update

Delete

Cancel

Delete	File Name	File Size	Uploaded Date
--------	-----------	-----------	---------------

You can now see the attachment I have added.

Uploaded Attachments

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

Delete	File Name	File Size	Uploaded Date
<input type="checkbox"/>	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:48

You are restricted to uploading 5 internal attachments and 5 external attachments.

Uploaded Attachments



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



Maximum 5 files can be uploaded at note level.

Delete	File Name	File Size	Uploaded Date
<input type="checkbox"/>	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:48
<input type="checkbox"/>	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:49
<input type="checkbox"/>	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:49
<input type="checkbox"/>	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:49
<input type="checkbox"/>	2017_Shellist_Abbie.doc	125.00 KB	02/06/2018 12:50

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.

Line Item Details (Total: 7)							
Item Details		Quantity	Price	Subtotal	Tax	Item Total (USD)	
1	<div><div>NON CATALOG</div><div></div></div> Microscope edit	<div>1</div>	12,000.00 / Each	12,000.00	0.00	12,000.00	more...
				Notes and Attachments:			
				Internal Note		External Note	
2	<div><div>NON CATALOG</div><div></div></div> Microscope Lens edit	<div>1</div>	500.00 / Each	500.00	0.00	500.00	more...
				Notes and Attachments:			
				Internal Note		External Note	
3	<div><div>NON CATALOG</div><div></div></div> Microscope edit	<div>1</div>	15,000.00 / Each	15,000.00	0.00	15,000.00	more...
				Notes and Attachments:			
				Internal Note		External Note	

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.

Transaction Summary

Transaction #: 98288

Create Date: 03/21/2018

Supplier: 2 DUDES BBQ

Requester: Abbie Shellist

Selection: Active

Status: Unsubmitted Transaction

System Note: None



Total Line Items: 1

Subtotal: 10,000.00

Total Value (USD): 10,000.00

Transaction Name

Notes and Attachments

Internal Note  External Note 

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.

1. Select Supplier: ACME BLOCK & BRICK INC

2. Add Item

Item/Service: Trade-in

UOM: Each

Qty: 1

List Price: -5000

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

UPC:

CAS Number:

Add to Cart

Submitting Your Transaction

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

Shop Manage (0) Pending

Search Keyword(s), Item Numbers, etc. Go to : All Transactions | Non-Catalog Items

Checkout

General Details

Payment Form: ☒ PO

Order Type: 1-Standard Order

Purchase Order #: 2059

User Group: Unassigned

Procurement Only: Select Commodity Code

Work Order #:

Asset >= \$4,999.99?: No

Continue

✓ Delivery Details

Attn : .

Location : PURCHASING DEPARTMENT

Change

✓ Billing Details

Attn : Abbie Shellist

Location : Purchasing Dept

Change

✓ GL Detail

Change

✓ Line Item Details (Total: 1)

Change

Workflow Details

Change

Forward

Request Approval

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.

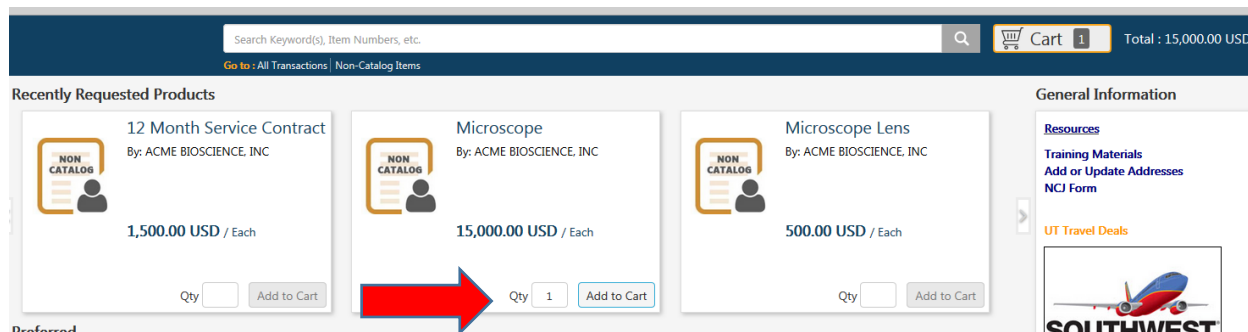
This step checks the fund and makes sure you have access to it. If so, you will see the workflow details open which shows the various workflow steps and who is able to approve. The status will tell you where your transaction is in the process. Active means it is at that step for approval. Once it is 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 Details		
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.

Cart 2

Total: 2

[Go to: All Transactions](#) | [Non-Catalog Items](#)

Item Summary (2 Items)

Item Details	Quantity	Price (USD)	Subtotal (USD)
<div>NON CATALOG</div> <div>Microscope</div> <div>By: ACME BIOSCIENCE, INC</div> <div>Catalog Item #:</div> <div>Mfg/Provider:</div>	1	15,000.00 / Each	15,000.00
<div>NON CATALOG</div> <div>Microscope</div> <div>By: ACME BIOSCIENCE, INC</div> <div>Catalog Item #:</div> <div>Mfg/Provider:</div>	1	15,000.00 / Each	15,000.00

Cart Summary

Total Items in Cart: 2

Number of Suppliers: 1

Cart Total (USD): 30,000.00

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.

Recent Transactions

02/06/2018 13:14-Shellist-PROQUEST LP dba PROQU...
PROQUEST LP dba PROQUEST LLC
Order Total (1 items): 10,000.00 USD [View](#)

02/06/2018 13:12-Shellist-2 DUDES BBQ
2 DUDES BBQ
Order Total (1 items): 1,800.00 USD [View](#)

02/02/2018 11:02-Shellist-ACME BIOSCIENCE, INC
ACME BIOSCIENCE, INC
Order Total (8 items): 60,500.00 USD [View](#)

General Information


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

General Information

Resources

[Training Materials](#)
[Add or Update Addresses](#)
[NCJ Form](#)

UT Travel Deals



Southwest Airlines Discounted Rates

Pending Transactions

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

Shop

Manage (1)

Search Keyword(s), Item Numbers, etc.

Go to : All Transactions | Non-Catalog Items

Cart 0

Total : 0.00 USD

Pending Transaction(s)

1 Transaction(s) from Recent Cart

Click on Transaction Name to complete the Checkout

NEW

02/06/2018 13:14-Shellist-PROQUEST L...

Transaction #: 94343

Total Line Items: 1

PO #: 2065

Total Value: 10,000.00 USD

Supplier: PROQUEST LP dba PROQUEST LLC

Create Date: 02/06/2018

Requester: Abbie Shellist

Unsubmitted Transaction

Hide 2 other Pending Transaction(s)

02/02/2018 11:02-Shellist-ACME BIOSCI...

Transaction #: 94064

Total Line Items: 8

PO #: 2062

Total Value: 60,500.00 USD

Supplier: ACME BIOSCIENCE, INC

Create Date: 02/02/2018

Requester: Abbie Shellist

Invalid Transaction

02/06/2018 13:12-Shellist-2 DUDES BBQ

Transaction #: 94342

Total Line Items: 1

PO #: 2064

Total Value: 1,800.00 USD

Supplier: 2 DUDES BBQ

Create Date: 02/06/2018

Requester: Abbie Shellist

Unsubmitted 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.

Transaction Summary

Transaction #: 94064



Create Date: 02/02/2018

Supplier: ACME BIOSCIENCE, INC

Requester: Abbie Shellist

Selection: Active

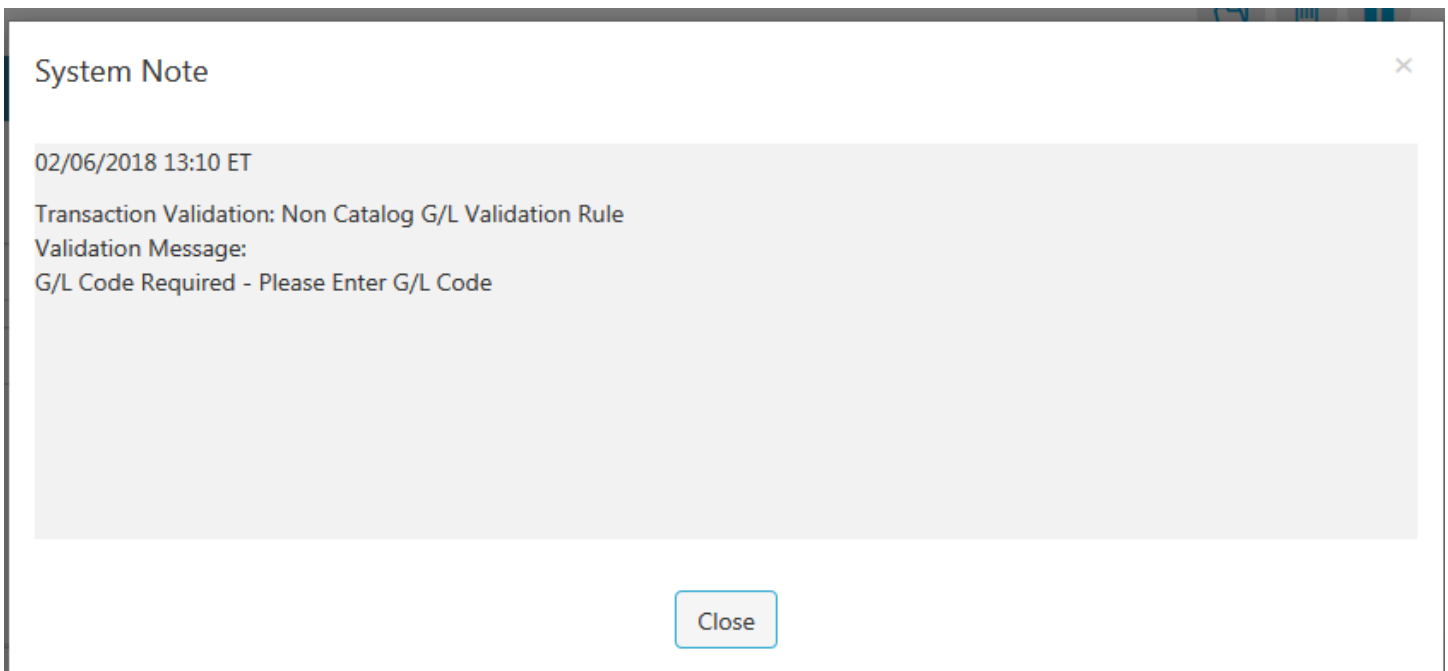
Status: Invalid Transaction

System Note: Alert  

Total Line Items: 8

Subtotal: 60,500.00

Total Value (USD): 60,500.00



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.”

General Details

Payment Form: ☒ PO

Order Type:

1-Standard Order

1-Standard Order

2-Infomral Bid-3 bids attached

3-Framework Order

4-Sole Source Standard-Attach NCJ Form

5-Sole Source Framework-Attach NCJ Form

-

Purchase Order #:

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.

Shop Manage (0)

Pending Transaction(s)

Search Keyword(s), Item Numbers, etc.

Cart 0

Total : 0.00 USD

Go to: All Transactions | Non-Catalog Items

Recently Requested Products

Concrete

By: ACME BLOCK & BRICK

15,000.00 USD / Lot

Qty

Add to Cart

Library License for 2018

By: PROQUEST LP dba PROQUEST LLC

10,000.00 USD / Each

Qty

Add to Cart

BBQ Dinner

By: 2 DUDES BBQ

12.00 USD / Each

Qty

Add to Cart

Preferred

Punchout

Punchout

General Information

Resources

Training Materials

Add or Update Addresses

NCJ Form

UT Travel Deals

SOUTHWEST

Southwest Airlines Discounted Rates

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



Checkout



General Details

Payment Form: ☒ PO

Order Type:

Purchase Order #:

Fiscal Date:

Delivery Date:

User Group:

Procurement Only:

Work Order:

* Asset > \$4,999.99?:

[Continue](#)

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 

 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

**Purchase Requisition
Non-Competitive Justification**

Complete all that apply:

<input type="checkbox"/> New Purchase	<input type="checkbox"/> Amendment to an existing purchase order
Original Start Date: <input type="text"/>	Amendment Start Date: <input type="text"/>
Original End Date: <input type="text"/>	Amendment End Date: <input type="text"/>
Original Amount: <input type="text"/>	Amendment Amount: <input type="text"/>
Total Amount with ALL Amendments: <input type="text"/>	Previous PO #: <input type="text"/>

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**.

al Details

Payment Form: ☒ PO

Order Type:

1-Standard Order

1-Standard Order

2-**Informal Bid-3 bids attached**

3-Framework Order

4-Sole Source Standard-Attach NCJ Form

5-Sole Source Framework-Attach NCJ Form

Purchase Order #:

ery DetailsAttn : Abbie ShellistLocation

1 DetailsAttn : !Location

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.

Shop Manage (0) Pending Transaction(s)

Search Transactions, Item Numbers, etc.

Cart 0 Total : 0.00 USD

All Transactions (Total 4)

Filter By: All Showing: Last 7 days Sort By: Recently Added Search Transaction# or PO#

02/06/2018
Transaction # 94342

Total Line Items: 1
PO #: 2065

Total Value: 10,000.00 USD
Supplier: PROQUEST LP dba PROQUEST LLC

Create Date: 02/06/2018
Requester: Abbie Shellist

Unsubmitted Transaction

02/06/2018
Transaction # 94342

Total Line Items: 1
PO #: 2064

Total Value: 1,800.00 USD
Supplier: 2 DUDES BBQ

Create Date: 02/06/2018
Requester: Abbie Shellist

Unsubmitted Transaction

02/02/2018 11:02-Shellist-ACME BIOS...
Transaction # 94064

Total Line Items: 8
PO #: 2062

Total Value: 60,500.00 USD
Supplier: ACME BIOSCIENCE, INC

Create Date: 02/02/2018
Requester: Abbie Shellist

Unsubmitted Transaction

01/30/2018 10:32-Shellist-ACME BIOS...
Transaction # 93756

Total Line Items: 1
PO #: 2059

Total Value: 12,000.00 USD
Supplier: ACME BIOSCIENCE, INC

Create Date: 01/30/2018
Requester: Abbie Shellist

Submitted to Supplier

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

You can choose a time frame to show

Showing: Last 7 days Sort By: Recently Added

Total Line Items: 1 Total Value: 1,800.00 USD Create Date: 02/09/2018

PO #: 2069 Supplier: 2 DUDES BBQ Requester: Abbie Shellist

Total Line Items: 1 Total Value: 165,000.00 USD Create Date: 02/09/2018

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.

Showing: Last 7 days Sort By: Recently Added

Total Line Items: 1 Total Value: 1,800.00 USD Create Date: 02/09/2018

PO #: 2069 Supplier: 2 DUDES BBQ Requester: Abbie Shellist

Total Line Items: 1 Total Value: 165,000.00 USD Create Date: 02/09/2018

PO #: 2068 Supplier: ACME BLOCK & BRICK Requester: Abbie Shellist

Total Line Items: 1 Total Value: 165,000.00 USD Create Date: 02/09/2018

PO #: 2067 Supplier: ACME BLOCK & BRICK Requester: Abbie Shellist

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

All Transactions (Total 4)

Filter By: All Showing: Last 7 days Sort By: Recently Added

Search Transaction# or PO#

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

Menu


Shop Manage (0)

Search Keyword(s), Item Numbers, etc.

Go to: All Transactions | Non-Catalog Items

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.

 **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...
Transaction #: 94357

Total Line Items: 1
PO #: 2066

Total Value: 15,000.00 USD
Supplier: ACME BLOCK & BRICK

Create Date: 02/06/2018
Requester: Abbie Shellist

Unsubmitted Transaction

Hide 3 other Pending Transaction(s)

02/02/2018 11:02-Shellist-ACME BIOSCL...
Transaction #: 94064

Total Line Items: 8
PO #: 2062

Total Value: 60,500.00 USD
Supplier: ACME BIOSCIENCE, INC

Create Date: 02/02/2018
Requester: Abbie Shellist

Approval Rejected



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

Transaction Summary

Transaction #: 94064

Create Date: 02/02/2018

Supplier: ACME BIOSCIENCE, INC

Requester: Abbie Shellist

Selection: Active

Status: Approval Rejected

System Note: [History](#)

Total Line Items: 8



Subtotal: 60,500.00



Total Value (USD): 60,500.00

Transaction Name

02/02/2018 11:02-Shellist-ACME BIOSCIENCE, IN

Notes and Attachments

Internal Note  

External Note  

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...

Transaction #: 94357

Total Line Items: 1

PO #: 2066

Total Value: 15,000.00 USD

Supplier: ACME BLOCK & BRICK

Create Date: 02/06/2018

Requester: Abbie Shellist

Unsubmitted Transaction

Hide 3 other Pending Transaction(s)

02/02/2018 11:02-Shellist-ACME BIOSCL...

Transaction #: 94064

Total Line Items: 8

PO #: 2062

Total Value: 60,500.00 USD

Supplier: ACME BIOSCIENCE, INC

Create Date: 02/02/2018

Requester: Abbie Shellist

Approval Rejected

Click on the name of the transaction and the requisition will open and allow you to make changes.

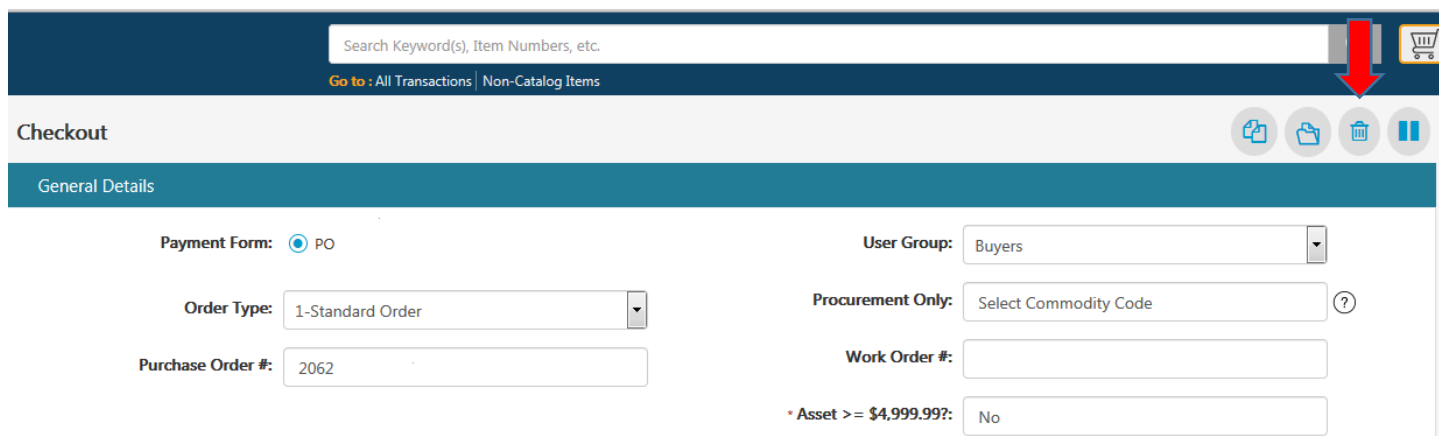
1. Make your changes and click on Request Approval and this will go back through workflow for approval

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.



The screenshot shows the 'Checkout' page with a search bar at the top. Below the search bar, there are links for 'Go to : All Transactions' and 'Non-Catalog Items'. The 'Checkout' section has a 'General Details' tab. The form includes fields for 'Payment Form' (set to PO), 'Order Type' (set to 1-Standard Order), 'Purchase Order #' (set to 2062), 'User Group' (set to Buyers), 'Procurement Only' (set to Select Commodity Code), 'Work Order #', and 'Asset >= \$4,999.99?' (set to No). A red arrow points to the trashcan icon in the top right corner of the checkout page.

Checking Workflow

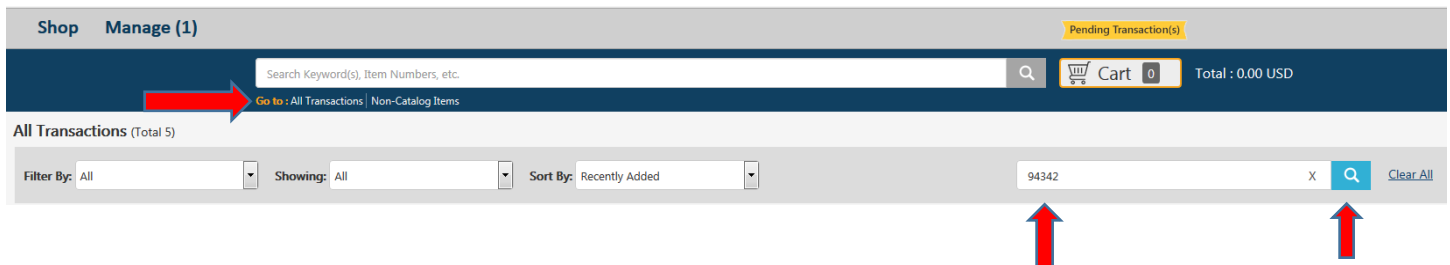
To check the workflow of a transaction you have submitted, go to All Transactions or search for your transaction number in the search transaction or PO field.

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



Workflow Details		
Workflow Name	Approver Name	Status
Approver U170007035	Mark A Paganelli	Approved - 02/06/2018 13:23 ET
	OR Cindy Stockdale	
	OR Jody T Huff	
	OR Jennifer K. Lane	
	OR Robert C Chance	
	OR Susan Bevelhimer	
	OR Timothy F Mapes	
	OR Abbie Shellist	
	OR Blake Reagan	
Purch Standard UTK	David E Marks	Approved - 02/06/2018 13:55 ET
	OR Jack Walker	
	OR Blake Reagan	
	OR Lisa R Pate	
	OR Amy Dudenbostel	
	OR Casey Carrigan	
	OR Abbie Shellist	
	OR Ryan Holliday	

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.




Shop Manage (1) Pending Transaction(s)

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

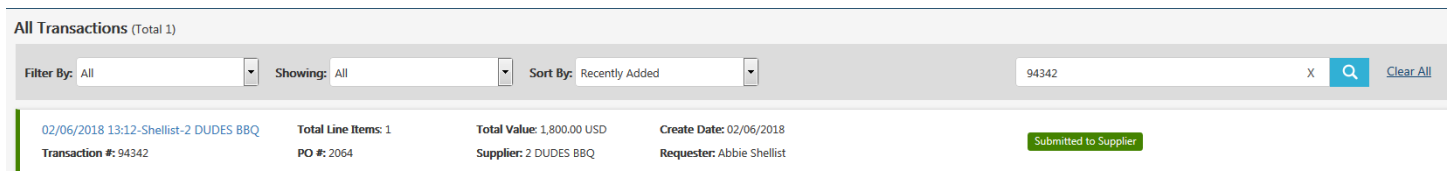
[Go to : All Transactions](#) [Non-Catalog Items](#)

All Transactions (Total 5)

Filter By: All Showing: All Sort By: Recently Added


94342 X  [Clear All](#)

Click on the name of the transaction which will be in blue. This will open your old transaction.



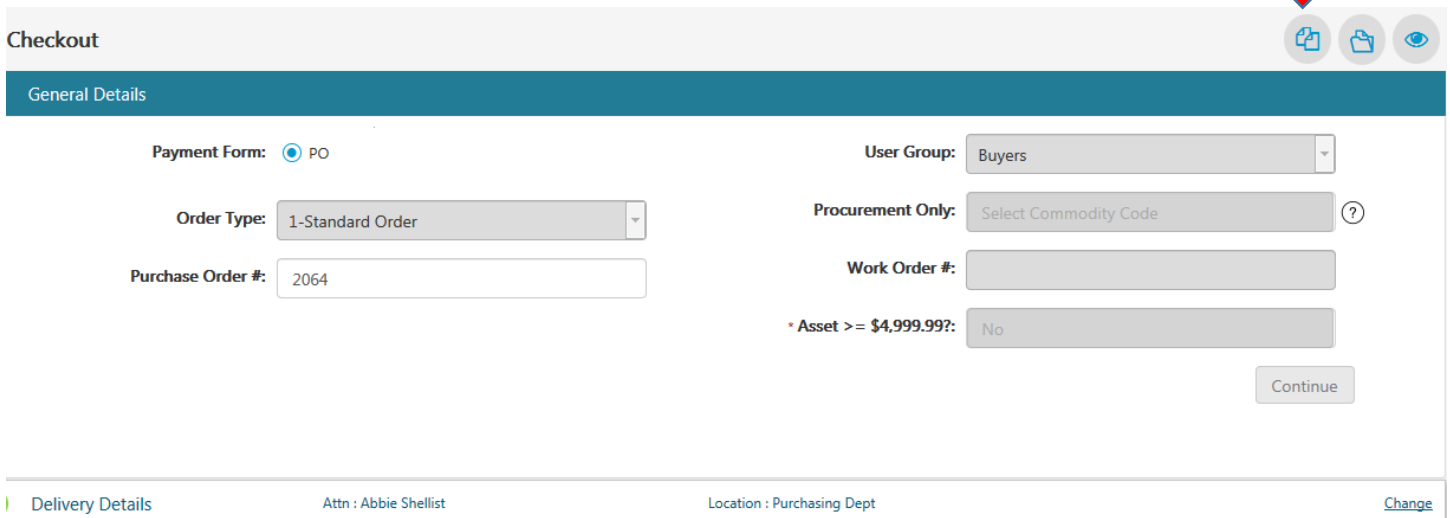
All Transactions (Total 1)




Filter By: All Showing: All Sort By: Recently Added

94342 X  [Clear All](#)

02/06/2018 13:12-Shellist-2 DUDES BBQ Total Line Items: 1 Total Value: 1,800.00 USD Create Date: 02/06/2018
Transaction #: 94342 PO #: 2064 Supplier: 2 DUDES BBQ Requester: Abbie Shellist [Submitted to Supplier](#)

Click on the copy icon (two pieces of paper) and you will be asked if you want to copy your transaction.



Checkout   

General Details

Payment Form: ☒ PO User Group: Buyers

Order Type: 1-Standard Order Procurement Only: Select Commodity Code ?

Purchase Order #: 2064 Work Order #:

* Asset >= \$4,999.99?: No


[Continue](#)

Delivery Details Attn : Abbie Shellist Location : Purchasing Dept [Change](#)

Click "yes"

Copy Transaction

Are you sure you want to create a copy of this transaction?



YesNo

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.

Transaction Summary

Transaction #: 94669

Create Date: 02/09/2018

Supplier: 2 DUDES BBQ

Requester: Abbie Shellist

Selection: Active

Status: Pending Validation

System Note: None

Total Line Items:

1

Subtotal:

1,800.00

Total Value (USD):

1,800.00

Transaction Name

COPY - 02/09/2018 08:51-Shellist-2 DUDES BBQ

Update

Notes and Attachments

Internal Note

External Note

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

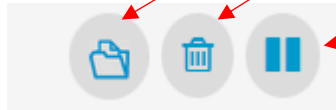
You are able to change the following fields in the copy:

- 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		<input type="checkbox"/>	5500007098	1	Professional

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

PO Reference

Purchase Order/Scheduling Agreement: 5500007098

Layout: Goods/service items | 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				


[illegible]

Transaction: Invoice

Basic Data | **Payment** | Details | Tax | Withholding tax | Contacts | Note

BaselineDt: 06/29/2017 Payt Terms: N30 30 Days 0.000 %
 Due on: 07/29/2017 0 Days 0.000 %
 Discount: USD 0 Days net
 Fixed ☐
 Pmt Method: ☐ Pmnt Block: Free for payment

Transaction



Basic Data Payment Details Tax Withholding tax Contacts Note

Unpl. Del. Csts

Currency Exch. Rate

Doc. Type Inv. Party

Bus. Area




Assignment G/L

Header Text


Plg level Planning Day

Click on “Save as Completed” button at the top.

Park Incoming Invoice: Company Code UT

Show PO structure Show worklist  Hold  Simulate  Save as Completed | Mes

Transaction Invoice



Basic Data Payment Details Tax Withholding tax Contacts Note

Unpl. Del. Csts

Currency USD Exch. Rate 1.00000