Burrell College of Osteopathic Medicine

Purchase Requisition Process

using e-Requester

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e-Requester
(Fraxion)

Introduction

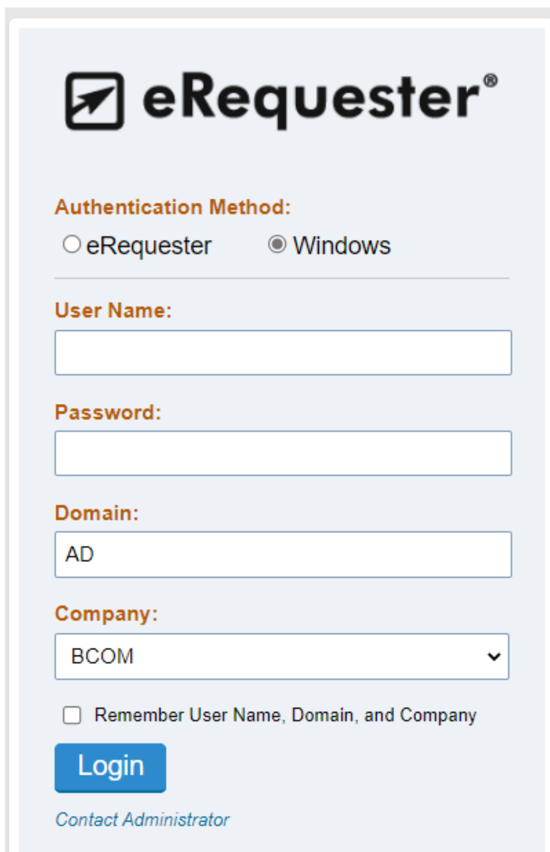
e-Requester is a web-based purchasing application that enables employees to create purchase requests, submit them for approval, and generate Purchase Orders.

Logging In

Go to Quick Links on the Burrell College webpage and select e-Requester.

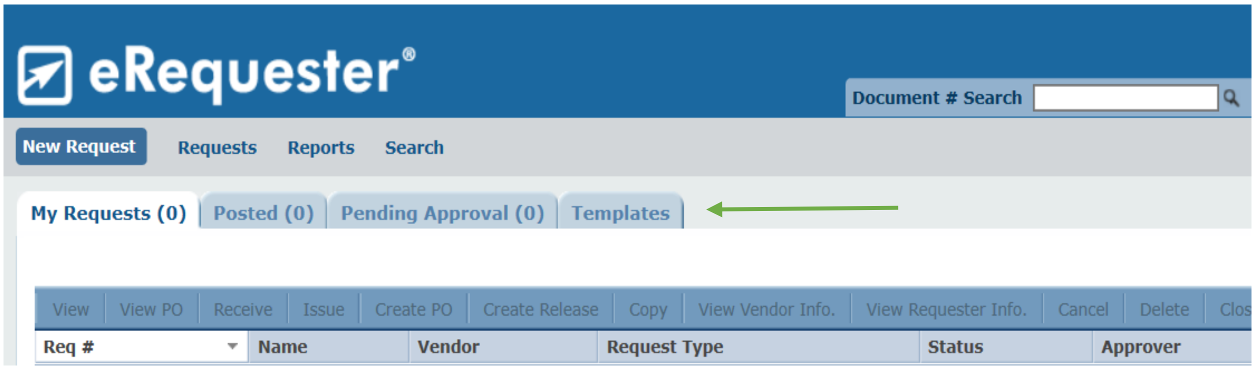
It should look something like the following image. Select Windows under Authentication Method.

Enter your User Name and Password. Click on Login.



e-Requester Dashboard

Once you have logged in, you will be taken to e-Requester's Dashboard. The Dashboard is where you will be provided with a quick overview of active requests that fall within your preview based on the configuration of your User Profile. It consists of up to 4 tabs, each of which will contain a group of requests at a similar point in their lifecycle.

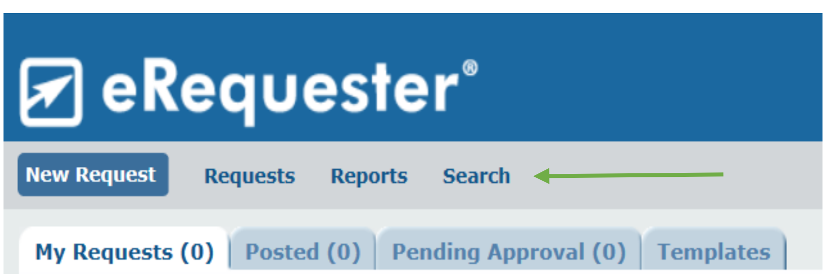


The main Dashboard tabs are:

1. **<u>My Requests</u>**: All your requests will appear here until the Purchasing Tech - (Peggy Ortega) creates the Purchase Order.
2. **<u>Posted:</u>** The "Posted" tab will show all of your requests that have an assigned Purchase Order Number
3. **<u>Pending Approval:</u>** Requests that are awaiting approval. If you are not an approver, you will still see the "Pending Approval" tab but the count will always show 0.
4. **<u>Templates:</u>** Requests that have been saved as a personal template or a shared template from your request department(s). Templates allow for easier duplication later, such as regular monthly supply orders.

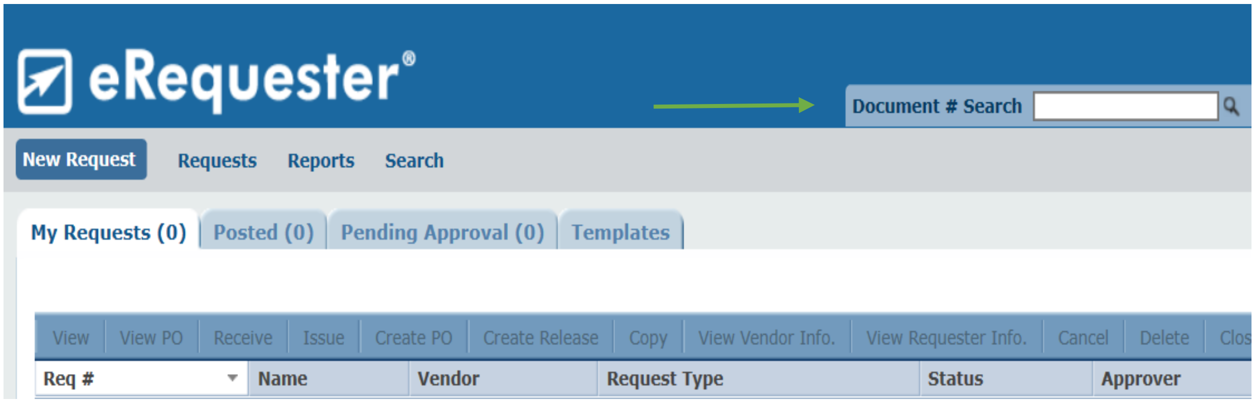
Navigating e-Requester

In addition to the Dashboard tabs, you can also see e-Requester's main Navigation Pane near the top of any given page:



Mouse over “Requests” to see a drop-down menu of options. These options will be identical to your user’s Dashboard tabs.

You may also search for requests in the system by clicking the “Search” link, which should be the link furthest from the left on the Navigation Pane. Depending on your rights as a user, some options may be available and others may not.

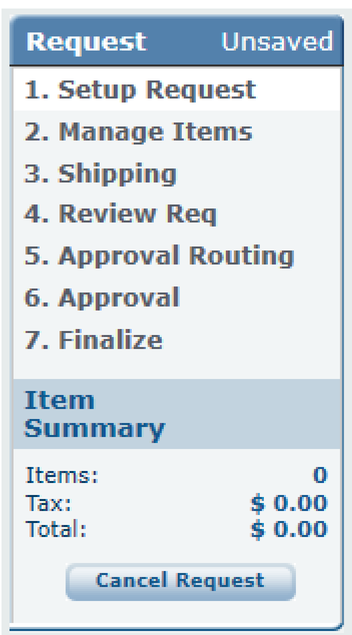


Creating a Request

To create a new request, click on "New Request" button in the Navigation Pane. This can be found in the upper-left corner of any given page in e-Requester.

The Request Sidebar

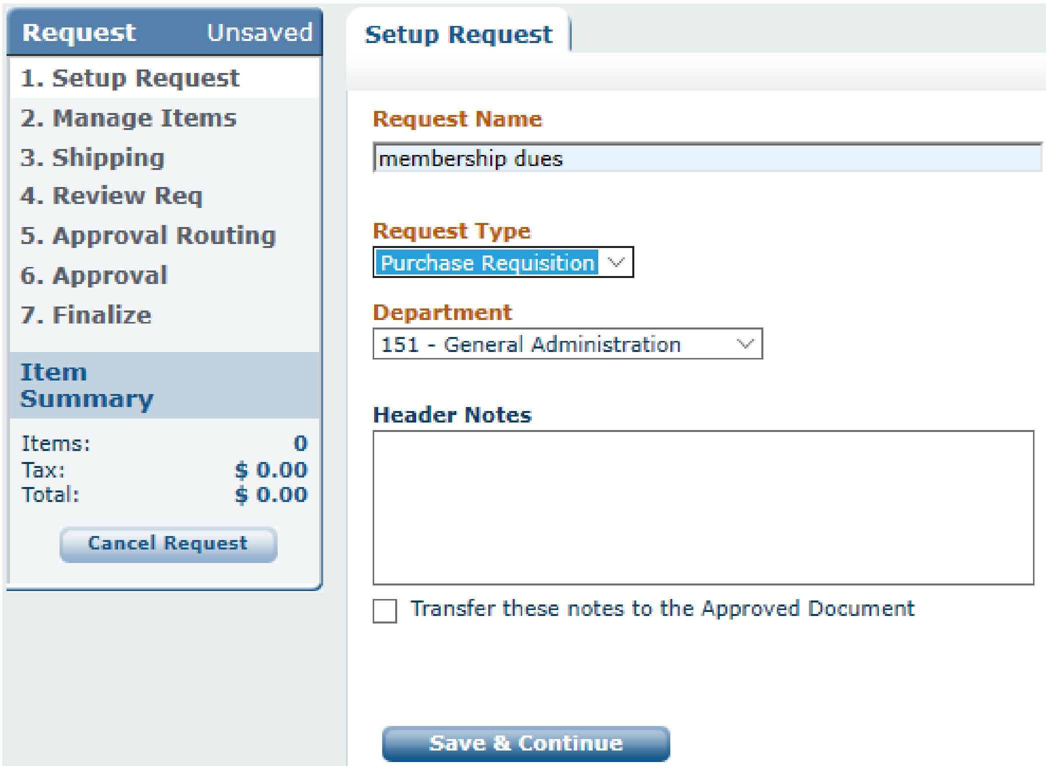
On the left-hand side of the page, you will also see a sidebar which provides you with the following information:



1. The Request Status ("Unsaved" in the screenshot)
2. The various stages in the lifecycle of a request (Setup Request, Mange Items, etc.) with those completed indicated by a blue check mark.
3. A summary of the number of items on the request, the total charges and the total cost of the request.

Tip: These descriptions also serve as links which allow the user to jump from one page to another when the request is in an editable state.

Upon clicking the New Request button, you will be taken to the Setup Request page, see image below.



On this page, you'll be asked to specify the Request Name, Request Type, and Department that you are generating the request for.

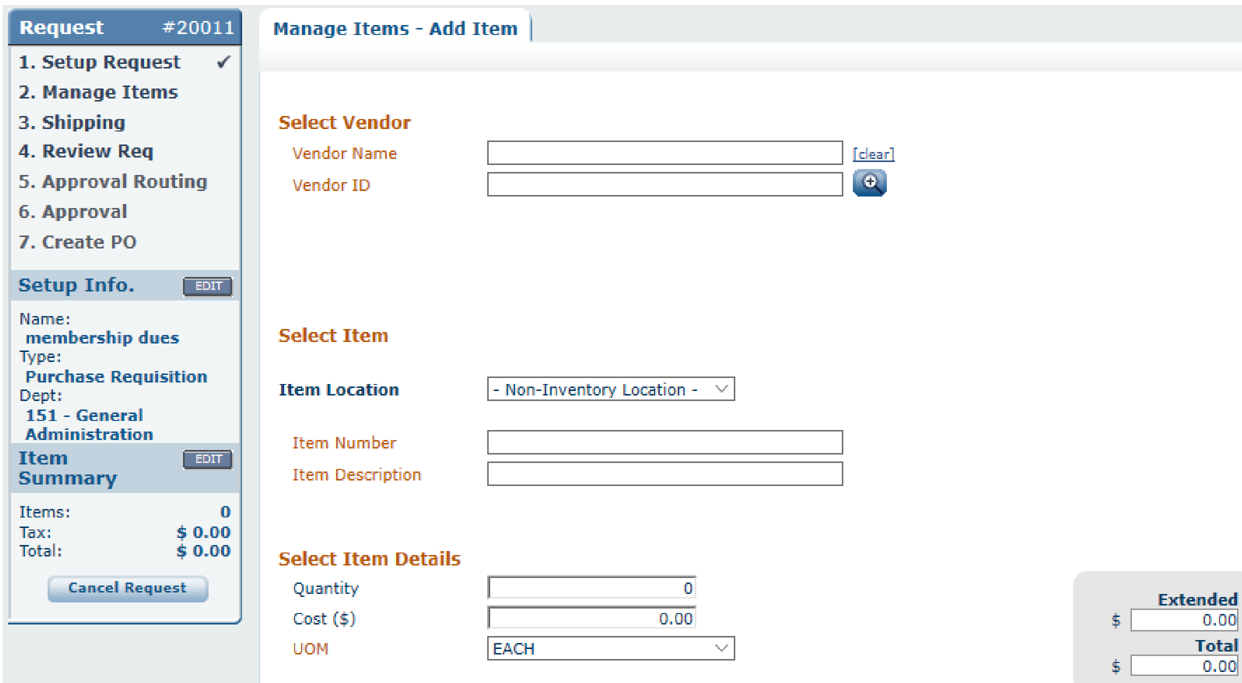
Please note that an **orange** field description indicates that the field is required before proceeding to the next page.

A "Header Notes" box is provided for the entry of additional notes.
Do not select 'Transfer these notes to the Approved Document'.

Click the "Save & Continue" button when you are ready to save the information on the current page proceed to the next.

Adding Items to Your Request

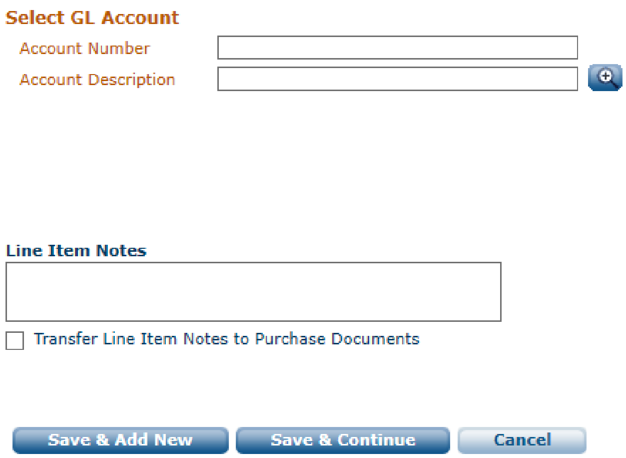
Clicking Save & Continue on the Setup Request page will take you to the Add/Manage Item page. The top of the page should look something like below.



It is on this page that you will define each line item you would like to add to the request. Once again, the required fields are listed with **orange** descriptions**.**

By default, the following fields are present on the Add/Manage Item page:

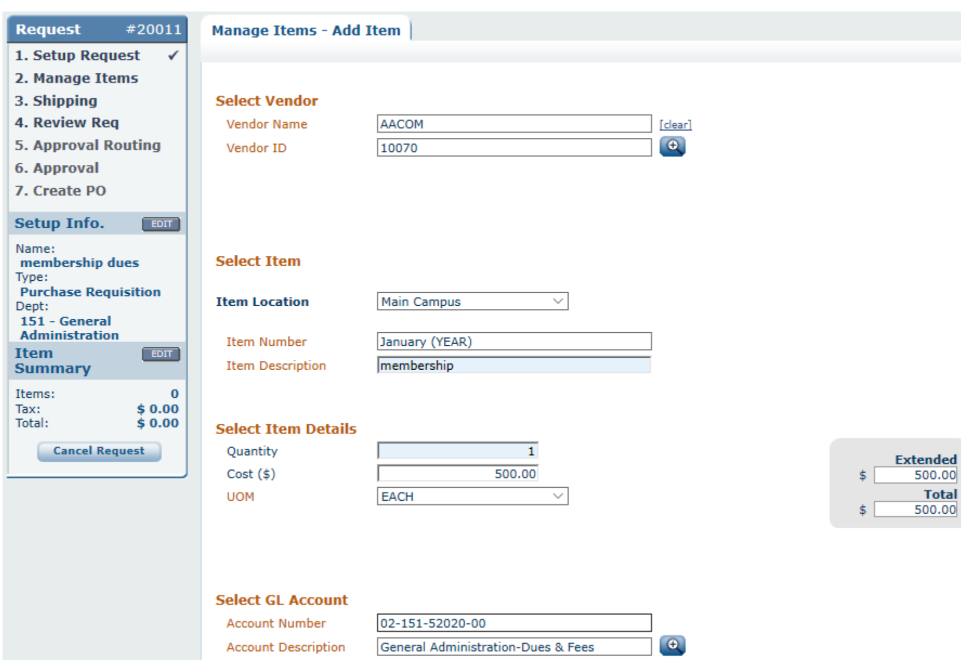
> **Select Vendor**: Select the appropriate vendor by using the lookup next to the "Vendor ID" field. Alternatively, you can type the name of the vendor into the "Vendor Name" field. A list of vendors will come back matching the information you type in. From the list, click on the desired vendor and the vendor will populate into the "Vendor Name" and "Vendor ID" fields.
>
> **Select Items:** Select the location. Enter an Item Number and Item Description.
>
> **Select Item Details:** Type in the quantity. This is entered into the "Quantity" field.
>
> You will then type in the price of the item into the "Cost ($)" field. Add additional lines for tax and shipping (if applicable).



GL Account: Select the appropriate GL Account from the lookup or type in the GL Account's description or number.

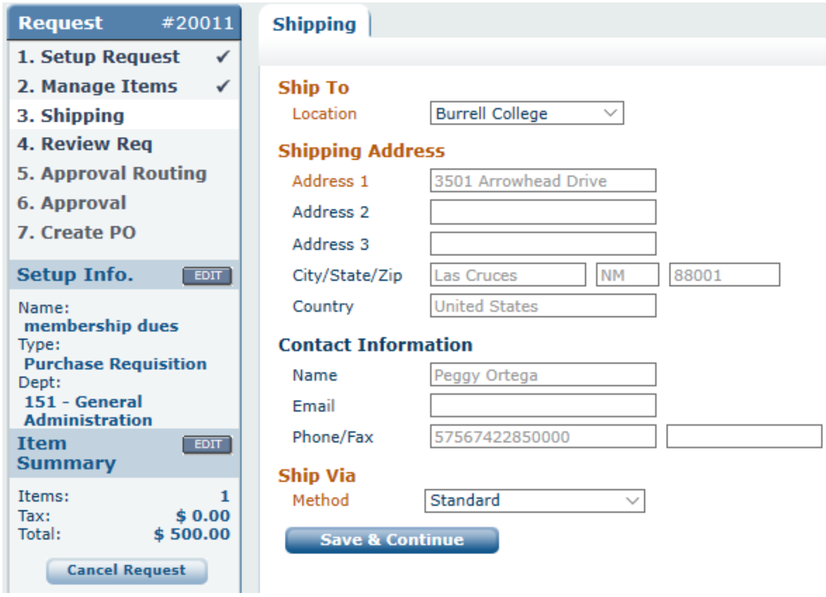
Line Item Notes box is provided for additional notes about the item details.
Check the box next to "Transfer Line Item Notes to Purchase Documents" to transfer the notes to the line items.

Once you have completed all required steps, you can add a new line item by clicking on the "Save & Add New" button, which will save the current line's information to the request and refresh the add/manage item page for the entry of information for the new line.



As you add items, you will see the Item Summary to the left of the request with the total amount and item quantity. When you have finished adding items, click the "Save & Continue" button. This will take you to the "Shipping" page.

Shipping Information



Select the “Ship To Location”. Once it is selected the “Shipping Address”, and “Contact Information” will be populated for you.

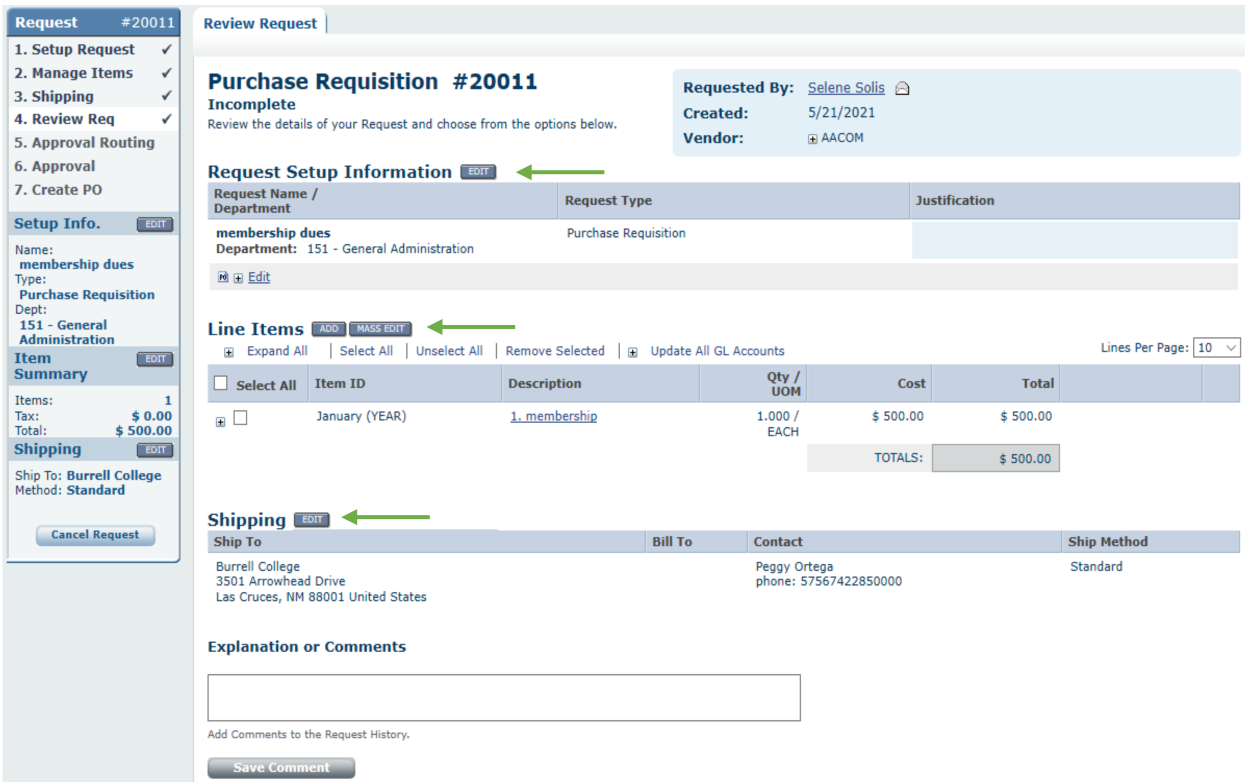
If you need to change the “Ship To Location”, such as deliveries to the Research Lab, select the information from the drop-down. The “Shipping Address” automatically populates from your selection.

The “Contact Information” fields display details which the user account and are not able to be changed.

A shipping method from the “Ship Via Method” drop-down will need to be selected before clicking the “Save & Continue” button.

Reviewing and Editing Your Request

You now have the opportunity to review your request before submitting it for approval. Reviewing your request allows you to catch any corrections before the approvers see them.



The top of the Review Request page is subdivided into three sections, which correspond directly to the previous three pages in the request creation lifecycle (i.e. "Request Setup," "Line Items", and "Shipping").

Line item details can be expanded by clicking the "+" button on the left-hand side of the page. Each line item will have its own "+" mark. You can also expand all line item details by clicking the "+" next to "Expand All" near the top of the "Line Items" subsection.

If an additional line item needs to be added to the request, click on the "Add" button. The "Add" button is located right next to the "Mass Edit" button. This will place you back into the "Add Item" page to add in your line item.

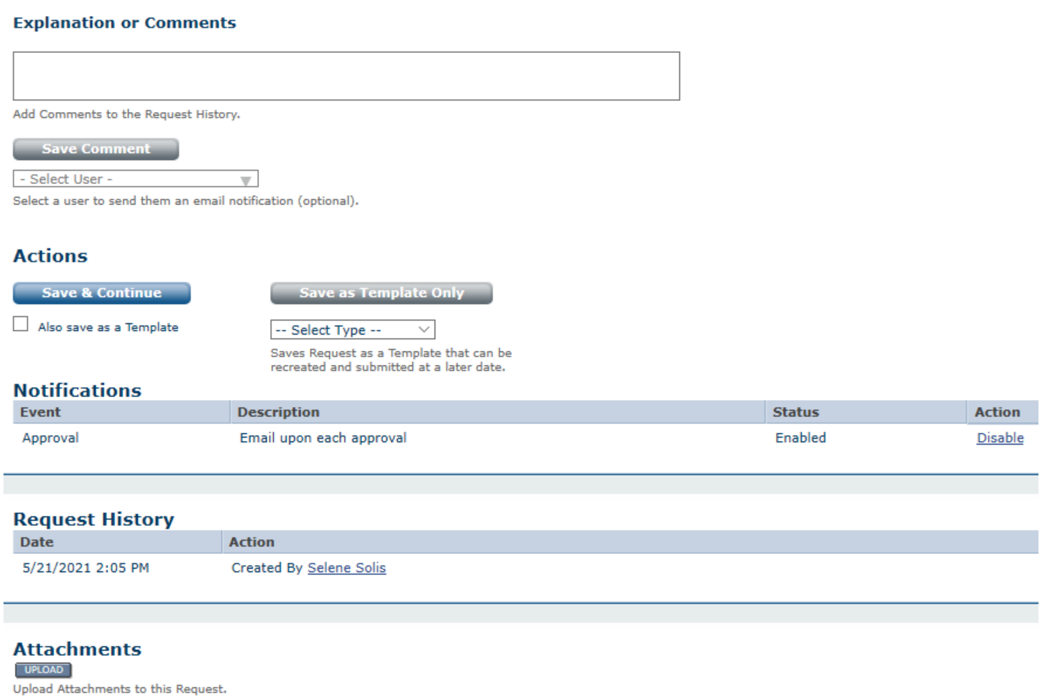
If a line item needs to be removed from the request, check the box next to the item and click on the "Remove Selected" link.

To change the department, request type, or notes; click on the "Edit" button next to "Request Setup Information" text on the "Review Request" page.

Once you are done, click on the "Save & Continue" button to advance to the "Review Request" page.

Comments, Notifications, Templates, Request History

After you have reviewed the details of your request, you can return to the "Review Request" page and scroll down to see additional information and add in comments or create a template.



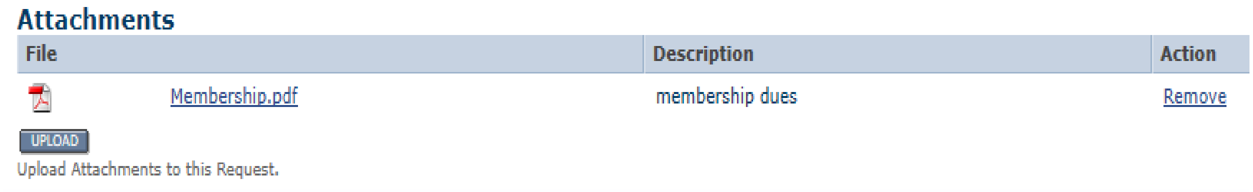
Before you submit your request for approval, you can add in a note into the "Explanation or Comments" field. You can also select a user from the drop-down below and click on the "Save Comment" button. The user you select will get an email notification alerting them of the note you typed in.

The "Notifications" section will show you the default notifications for this type of request. You can enable or disable the notifications your administrator has set up for this type of request by clicking the "Disable" or "Enable" link under "Action".

During the lifecycle of a request, an important section to review is the "Request History". The "Request History" shows each step the request takes as it goes through the creation, approval, and PO process. It also shows any comments that were typed into the "Explanation or Comments" box. At any time during the process, you can go back to your request and see its history.

Once all of the required information has been entered, you can submit the request or you can save the request as a "Personal Template". Check the box titled "Also Save as a Template" when submitting a request. This will additionally create a "Personal Template". Your "Personal Template" will be listed under your "Templates" tab and only you will have access to it.

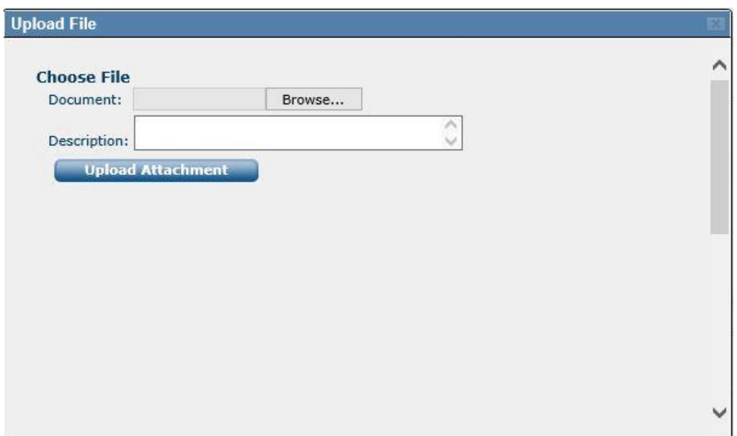
Attaching a Document



e-Requester allows the attachment of most file types (including .doc, .docx, .xls, .xlsx, .pdf, .jpg, and .png).

You can upload attachments to any accessible request by clicking the "Upload" button at the bottom of the "Review Request" page.

Next, click on the "Browse…" button and use the File Explorer Dialog Box which opens as a result to locate the document you wish to attach to the request. Put in the description of the attachment, if desired. You can click on the "Upload Another" button to attach more documents. When you are done, click the "Done" button.



Please Note: The attachments are visible to anyone who has access to your requests.

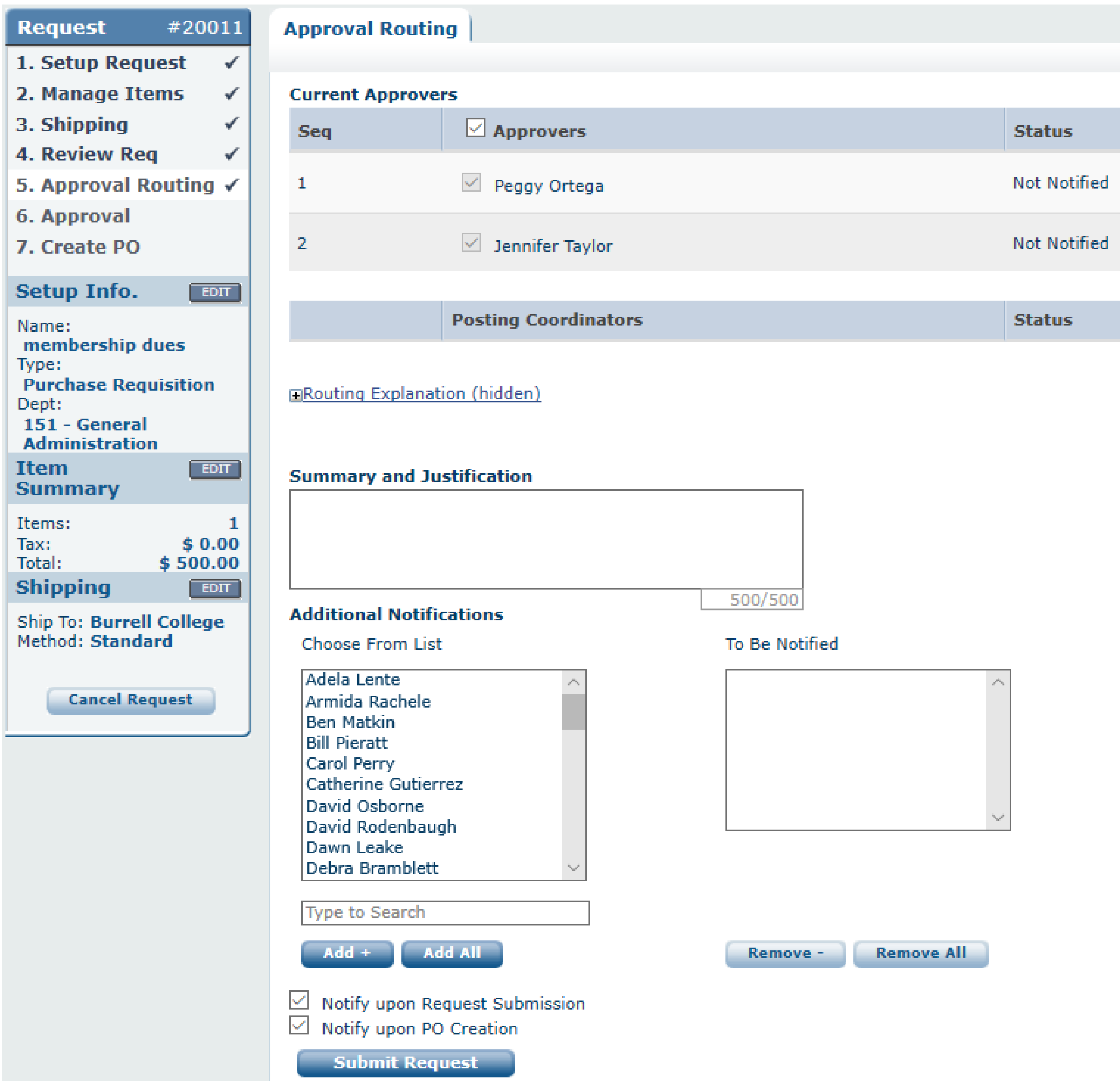
Once an attachment has been added, you can delete it by clicking the "Remove" link next to the attachment name on the "Review Request" page.

Once you are done editing your request, click on the "Save & Continue" button to proceed to Approval Routing.

Reviewing the Approval Process

You have now successfully made it to the “Approval Routing” page. This page represents the last step the requester must proceed through before the request is submitted to its approvers.

On this page, Purchasing Technician will review for accuracy of the request. Then the request will be routed to the Department Director for approval.



Entering a Summary and/or Justification

The “Summary and Justification” text box is provided for the user to enter in a text message of up to 500 characters explaining the reason for the request’s existence. This is a free-form text box and does not have any restrictions upon its content, aside from the character limit.

Specifying additional users to be notified

The “Additional Notifications” subsection allows you to specify additional users you wish to notify regarding the request. To add a user to be notified, select the user from the list in the leftmost panel of the subsection and click the “Add +” button to move the selected user(s) to the rightmost panel. The selected user will be notified of the request, despite not being an approver for it.

<u>You will need to manually add yourself in the ‘To Be Notified’ box to receive an email from e-Requester letting you know of the submission.</u>

You can also determine whether these notifications go out upon request submission, upon PO creation, or both by using the check boxes directly beneath the “Add +” button.

Submitting the request

Once you click the “Submit Request” button the first approver listed will be sent an “Approval Required” email notification. This completes the process of creating a request.

Your Request Has Been Submitted!

Congratulations! You have successfully created and submitted a request. Your request is now in a “Waiting” status and will appear in your “My Requests” tab. The request will change to “Approved” status once all approvers have approved it. At any time, you can double click into the request from the “My Requests tab” to review it, or to check its history.

Once the request has been approved and turned into a purchase order, the request will appear under the “Posted” tab, depending on your user account rights.

If your request has been rejected, then it will remain in your “My Requests” tab and you will see the status shown as “Rejected”. Review the request to see the reason it was rejected. Approvers can also send requests back to you, if needing more information or requiring a change. These will also appear in your “My Requests” tab.