

CAPPS Desk Aid

Entering Purchase Requisitions

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Entering Purchase Requisitions

Navigation

Dashboard: Purchasing; **Tile:** Requisitions

From the *ePro Create Requisition* page:

1. Select **Special Requests** in the left-hand menu.

The screenshot shows the 'Create Requisition' interface. On the left, a vertical menu contains several options: Catalog, Item History, Favorites, Templates, **Special Requests** (highlighted with a red box), Fixed Cost Service, and Variable Cost Service. The main area is titled 'Special Requests' and contains several input fields: '*Item Description', '*Price', '*Currency Code' (set to USD), '*NIGP Class', '*Unit of Measure', 'NIGP Item', 'Quantity', 'Supplier ID', and 'Supplier Name'. There is also a search bar at the top right.

2. Enter the following fields:
 - ITEM DESCRIPTION (256-character limit)
 - PRICE
 - QUANTITY
 - NIGP CLASS
 - NIGP ITEM
 - UNIT OF MEASURE
 - SUPPLIER (optional except on ProCard requisitions)

This screenshot shows the 'Special Requests' form with the following data entered:

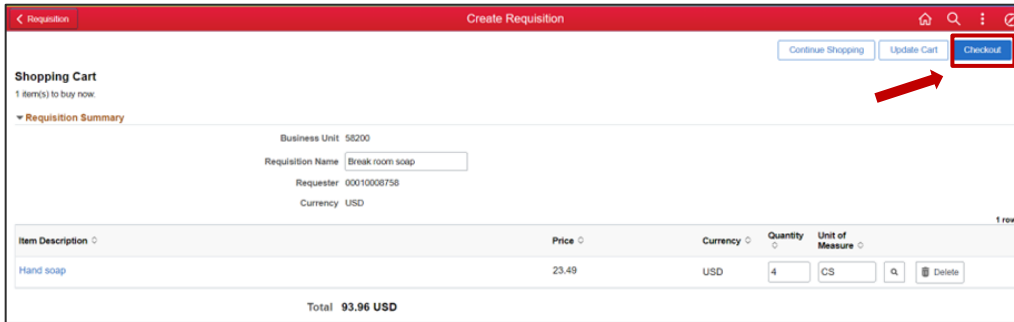
- *Item Description: Hand soap
- *Price: 23.49
- *Currency Code: USD
- *NIGP Class: 192
- *Unit of Measure: CS
- NIGP Item: 18
- Quantity: 4
- Supplier ID: (empty)
- Supplier Name: (empty)

 The 'Add' button at the bottom left is highlighted with a red arrow.

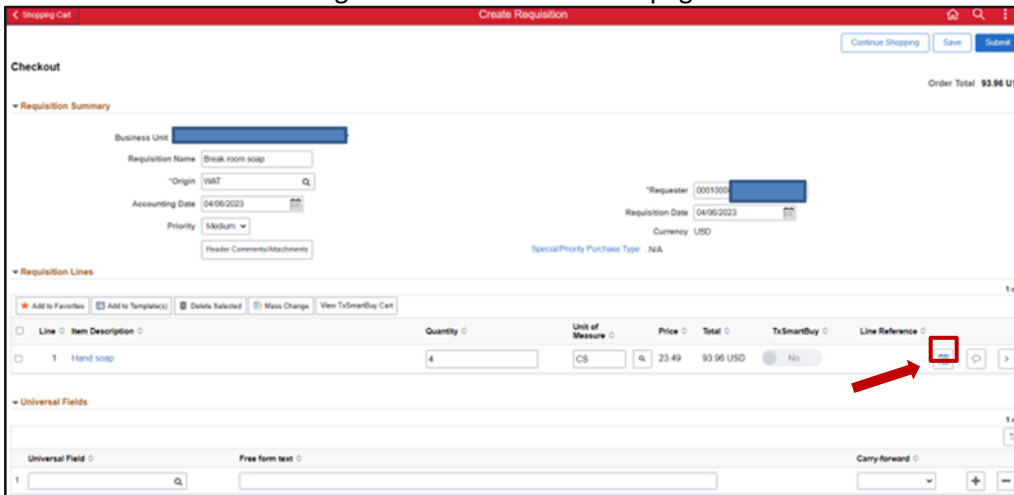
3. Select **Add** (at the bottom of the page).
4. Continue adding lines, if necessary.
—or—
Select the shopping cart (upper right-hand corner) to check out.

This screenshot shows the 'Create Requisition' page with the shopping cart icon in the top right corner highlighted by a red arrow. The 'Add' button from the previous screenshot is no longer visible, indicating it has been clicked.

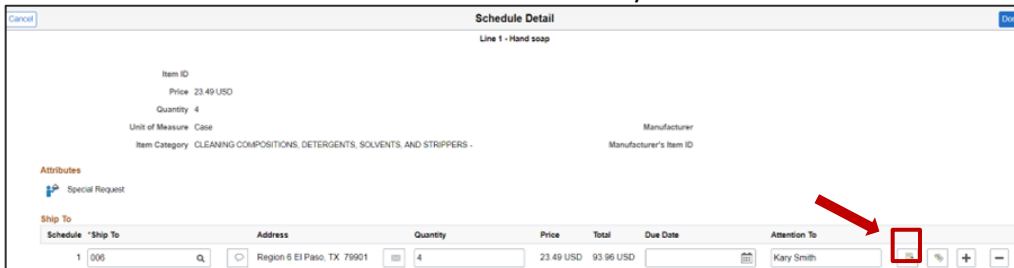
5. Enter the **Requisition Name**.
6. Select the **shopping cart** icon (upper right-hand corner) to check out.
7. Select **Checkout**.



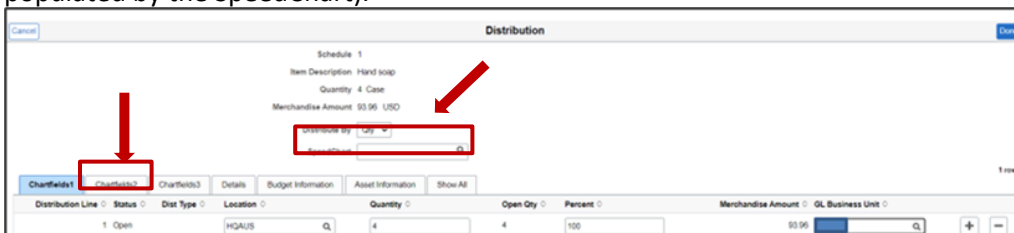
8. Select the **Schedule** icon to go to the *Schedule Details* page.



9. Select the **Distribution** icon to access *ChartField* entry.



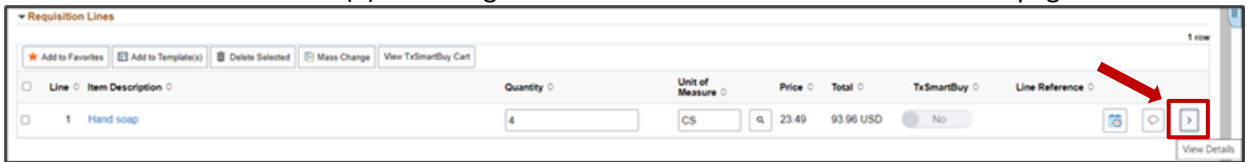
10. Select the SpeedChart (if your agency uses SpeedCharts, go to the **Chartfields2** tab to enter values not populated by the SpeedChart).



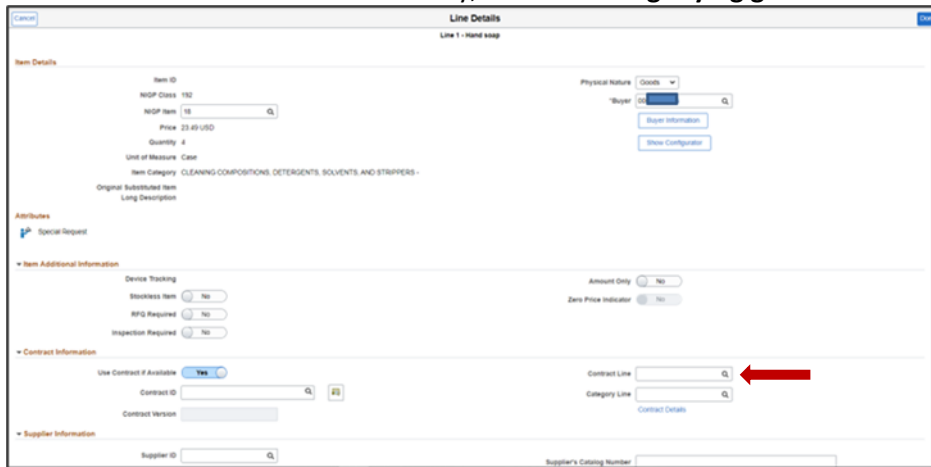
11. If multiple distributions are needed, reduce the **Qty** or **Amt** needed on **Distribution 1** to the desired quantity or amount.
12. Select the **Plus (+)** icon, to the right of the line, to carry the balance down to the next distribution line.
13. Select **Done** when finished, which returns you to the *Schedule* page.
14. Select **Done** on the *Schedule* page, which returns you to the main page where the requisition lines are displayed.
15. Repeat Steps 8–15 to add budget/ChartField information to any other requisition lines.

Additional Information for the Line Details Page

1. Select the **View Details** icon (>) on the right side of each line to view the **Line Details** page for each line.



2. Enter the following fields, if applicable:
 - **BUYER**
Should be populated by default and not changed, unless required by your agency.
 - **AMOUNT ONLY**
If a requisition line is intended to have multiple partial payments (such as varying payments for a service based on usage during the year), select **Amount Only**. This allows the dollar amount to be changed on each receipt and voucher.
 - **CONTRACT ID**
Enter or search for an existing procurement contract to attach to the line.
 - **SUPPLIER**
If a contract was attached, the **SUPPLIER** (Vendor) automatically populates. If not, select a contract and enter the **SUPPLIER**. If necessary, select the **magnifying glass** icon to search for a contract.



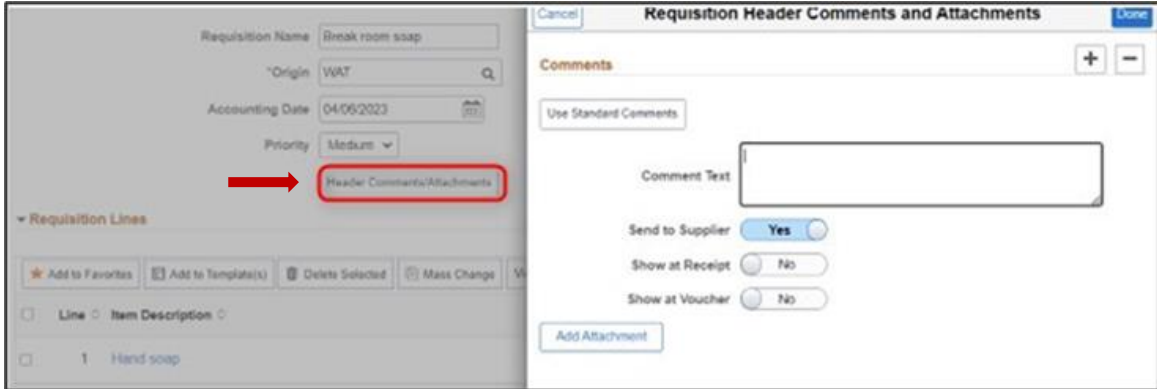
3. Select **Done** when finished entering info on the *Line Details* page.

Additional/Optional Fields on the Checkout Page

1. Enter the following fields, if applicable:

- COMMENTS / ATTACHMENTS (optional):

Header and **Line** comments can be entered with or without attachments. By default, these copy into the purchase order with the requisition. If you do not want a comment to copy into the purchase order, select **No** in the SEND TO SUPPLIER field.



- LINE COMMENT

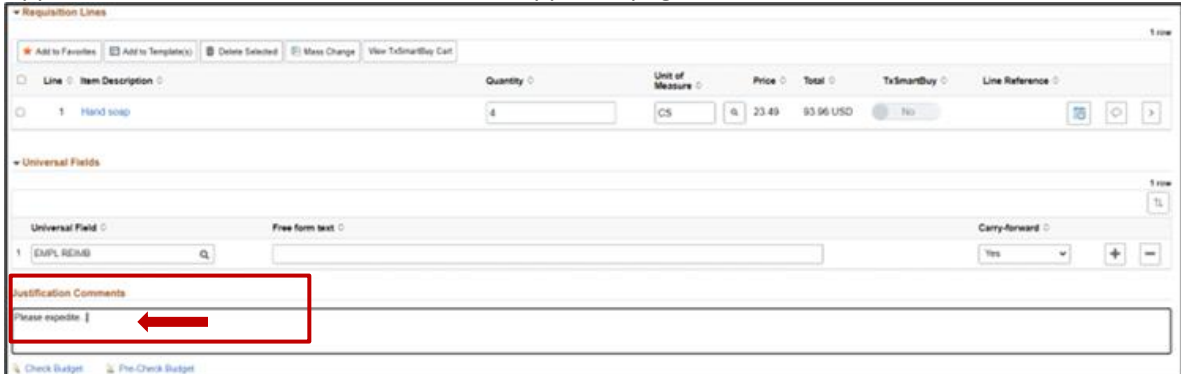
For comments specific to a particular line, select the comment icon on the right side of the requisition line.

- UNIVERSAL FIELDS

Use as instructed by your agency.

- JUSTIFICATION COMMENTS

Approvers can see these comments on the approval page.



2. Select **Submit** (after all entries are complete) to save and submit the requisition into workflow.

Note: This sets the requisition in *Pending Approval* status, and you are routed to the *Confirmation* page.

–or–

Select **Save** if you are not ready to submit to workflow yet.

Note: This sends the requisition into *Open* status and retains this requisition on the *Requisition* page.



Revision History

| Date | Description of Change | Changed By |
|--------------|-----------------------|------------|
| Dec. 9, 2024 | Initial release. | J. Goodman |
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