

ePro 9.2 User Guide

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Table of Contents

Introduction	
eProcurement at Berkeley Lab	
Training	
ePro 9.2 User Guide	2
Customer Guides	
Help With eProcurement	3
Contact Information:	3
Module 1 – Key Concepts	
Procurement Channels	
Item Category Codes	6
Restricted Items	9
Sole Source	
On-Site Services	
Approval Thresholds	
Separation of Requester & SAS Approver	
Module 2 - Creating and Approving ePro Requisitions	
Accessing eProcurement (ePro)	
Create Requisition	
Approving ePro Requisitions	
Check Requisition/Order Status	
PO Modifications	65
Edit or Cancel a Requisition	
Module 3 – Time-Saving Features	
Global Search	
Copy Requisition	
Favorites & Templates	
Navigation Personalization	
Personalization of Requisitions	
Applying Same Project and Activity for an Entire Order	
Copying Other Data to Multiple Lines	
Keyboard Shortcuts	
Frequently Asked Questions	
How many requisition lines should I enter?	
How do I change Approvers on a requisition I already submitted?	
Why isn't my requisition assigned to a buyer and placed?	
How can a new Approver be set up in ePro/eBuy?	
Glossary	
Exhibits	
Exhibit A – Consultant Services	
Exhibit B - Keyboard Shortcuts	

Introduction

eProcurement at Berkeley Lab

eProcurement (ePro) is an Oracle/PeopleSoft software product that the Lab uses to obtain unique goods and services from suppliers. It is a part of Berkeley Lab's Financial Management System (FMS). ePro requisitions are used to request unique goods and services that are not available from eBuy or from blanket orders. Once an electronic ePro requisition is created by an ePro requisition preparer, it is submitted for approval. After approval, the requisition is routed to Procurement, where it is assigned to a buyer who then issues a purchase order to a supplier for the item(s) on the requisition. Requisition/order status can be reviewed online in ePro's *Manage Requisitions* screen. The entire lifespan of a requisition (from Requisition to Order to Payment) can be viewed using the Requisition Lifespan feature.

Training

Because of the complexity of this standard product and unique business processes at Berkeley Lab, training is required for staff entering information into ePro. A required online course has been developed for ePro requisition preparers that explains the business and technical aspects of creating new ePro requisitions.

- The required online <u>FSM1406 ePro Requisition Preparer Training</u> takes approximately 45 minutes to complete. Exam questions are included in the course.
- If you are not a requisition preparer and do not want to take the training, fill in the LBNL ePro Requisition Worksheet and give it to an ePro requisition preparer to enter the information into eProcurement. The worksheet is available from the "Forms" link on the Procurement and Property Management website (<u>http://procurement.lbl.gov</u>) and by clicking <u>here</u>.
- A list of trained ePro requisition preparers is on the Procurement website in the <u>Make a Purchase</u> ePro section. It can be searched by Laboratory organization code and location.
- Optional <u>FMS1407 ePro Requisition and eBuy Approver Training</u> is available for approvers.
- If you need additional information about ePro training, send an email to the Procurement Help Desk at ProcurementHelp@lbl.gov.

ePro 9.2 User Guide

This ePro 9.2 User Guide is a reference for creating and approving ePro requisitions. Its three main sections are:

- <u>Module 1</u> "Key Concepts" addresses requisition business processes and policies.
- <u>Module 2</u> "Creating and Approving ePro Requisitions" covers the creation, approval, viewing, and maintenance of requisitions.
- <u>Module 3</u> "Timesaving Features" has tips to more efficiently create requisitions.

Use this guide's *Table of Contents* (Bookmarks) to navigate to various sections.

Refer to the *Glossary* at the end of the guide for definitions of terms.

See the *Exhibits* for information concerning Consultant Services and Keyboard Shortcuts.

Customer Guides

The following guides developed by Procurement provide factors to consider when preparing to request a purchase. These guides will help you identify what the Procurement Team might need from you based on specific elements applicable to your purchase. To download a guide related to one of the following types of purchases, click on its name below.

- <u>Customer Guide for Construction</u>
- <u>Customer Guide for Goods and Services</u>
- <u>Customer Guide for Research and Development</u>
- Intra-University Transactions Quick Guide
- Human Subjects Related Procurements
- Options for Filling Resource Needs

In addition, the following guides developed by organizations other than Procurement, will help the requester with their procurement.

- Intellectual Property Office (IPO) Subcontracting Guidelines (formally known as Innovation and Partnership Office)
- <u>Electrical Equipment Procurement Guide for Researchers</u>

Guides for customers are accessible from the <u>Procurement & Property ePro web page</u> under the righthand heading, EPRO Tools.

Help With eProcurement

If you encounter a problem that cannot be resolved by following this ePro 9.2 User Guide, feel free to send an email to ProcurementHelp@lbl.gov.

When asking for assistance, please provide the following information:

- What were you working on in the system when the problem occurred?
- What is the nature of the problem or the error message?
- Do you have a screen shot of the error?
- Can you duplicate the problem?

Procurement buyers and staff are also available to answer any questions you may have regarding ePro.

Contact Information:

Procurement Department Mailing Address

Lawrence Berkeley National Laboratory 1 Cyclotron Road, MS: 971-PROC Berkeley, California 94720 Phone: 510.486.6400 FAX: 510.486.4380

Procurement Department Location

6401 Hollis St., Ste. 175 Emeryville, CA 94608

Construction Team MS: 76-0211

Module 1 – Key Concepts

Module 1 covers several key concepts related to Berkeley Lab processes and policies that requisition preparers should know so that the purchase is made using the most efficient and cost effective means and requisitions are compliant with the Lab's business requirements. The following topics will be discussed:

- Procurement Channels
- Item Category Codes
- Restricted Items
- Sole Source
- On-Site Services
- Approval Thresholds
- Separation of Requester and SAS Approver

Procurement Channels

When a requester has a need to purchase a good or service, several Procurement channels are available to use. These channels enable requesters to obtain the good or service by the most efficient and cost effective means possible.

The following self-service options should be considered before a requisition is submitted to Procurement to place an order.

• **eBuy** is the Laboratory's online catalog. It is the quickest way to place an order for commonly used low-value items with many of the Laboratory's suppliers.

Visit Procurement's <u>eBuy web page</u> to log into eBuy, view a list of eBuy suppliers, and access videos and guides to help you learn to use eBuy.

View <u>eBuy Time-Saving tips</u> to help you shop efficiently.

• Berkeley Lab IT maintains a **repository of software** available for purchase or download at <u>software.lbl.gov</u>. This site provides access to the most commonly used software at the Lab, for office and research purposes.

The **Division PCard Program** allows authorized employees to make business-related purchases for lowvalue, standard off-the shelf items and services not available from the above self-service purchase options. To purchase items not allowed using a Division PCard (see <u>Division Cardholders Policy and</u> <u>Guidelines</u>, Unallowable Items or Processes) or not available via the self-service channels, a requisition will need to be prepared by an authorized division requisition preparer and be submitted to Procurement to place the order.

For information regarding the specific purchasing channels, visit the Procurement & Property <u>Make a</u> <u>Purchase</u> website, listen to the <u>Procurement Channels webinar</u>, or contact the Procurement Help Desk at <u>ProcurementHelp@lbl.gov</u>.

Item Category Codes

Favorites Main Menu ePro	curement Requisition						
I BERKELEY LAB - I	FMS All 👻 Search	×A	dvanced Search		H	ome Worklist Add	to Favorites Sign out
						New Win	dow Help Personalize Page
Create Requisition 👔							
Welcome Harris,Dana	💧 Hon	ne 🥕 My Preferences 🛱 Requisition Setti	ngs 🛛 🛱 OLines	Checkout			
Request Options	Search All		Search	Advanced Search			
All Request Options Catalog LBNL Item Cat	Item Entry 🧃	Restricted Item List					
LUNL REM LAT	Line			Personalize Find	View All 📳 🚦 🛛 First 🖇	1 of 1 🕅 Last	
eBuy eBuy Marketplace	Details 📰						
Create Requisition	Category Item ID	Description	Quantity UOM•	Price Supplier IC	Supplier Name		
Special Requests	1 41000000 Q	Q J	0		q	• •	
Forms	Add to Cart						

Item category codes classify, in general terms, requisition lines entered by ePro requisition preparers and are integral to the requisition creation and routing process. In FMS, Item Categories are stored and are searchable by both their long descriptions and their numeric or abbreviated codes. An item category code is selected by either typing part of its name or code or by using the lookup \bigcirc icon to search for the item category code. There are approximately 96 codes such as Precious Metals, Environmental Services, and Radioactive Isotopes & Materials. The *Purchasing Guide* on the Procurement & Property website provides a list of goods and services commonly purchased at the Laboratory and their corresponding Item Category codes. In addition, an *Item Category Codes* list is provided on the Procurement & Property ePro website.

It is important to select the right item category code for each line because the codes are used to:

- Route requisitions for the designated Item Category approvals when ordering safety, hazardous, or other special items
- Assist in the assignment of requisitions to buyers
- Designate when an item requires the receiving process
- Determine accounting entries and burdens
- Create reports based on categories purchased

When requisition lines are created, a list of Item Categories is available from which you can choose from. You can sort the list in numeric or alpha order by clicking the "Category" or "Description" heading.

Look Up C	Help			
SetID:	SHARE			
Category:				
	begins with 🔻			
Description:	begins with 🔻			
Look Up	Clear Cancel Basic Lookup			
Search Res	sults			
View 100	First 🕢 1-82 of 82 🕟 Last			
Category	Description			
10000000	Live Plant and Animal Material and Accessories and Supplies			
11000000	Mineral and Textile and Inedible Plant and Accessories and Supplies			
11101800	Precious metals			
12000000	Chemicals (All-Other) including Bio Chemicals & Gas Mats			
12142100				
12142100 121421R2	Gases (NR) - Bulk, Cylinder, Dry Ice Gases (R2) - Hazardous and Reactive			
13000000	2142200 Isotopes			
14000000	Resin & Rosin & Rubber & Foam & Film & Elastomeric Materials			
	Paper Materials and Products Fuels/Fuel Additives & Lubricants & Anti corrosive Materials			
15000000				
22000000	Building and Construction Machinery and Accessories			
24000000	Material Handling and Storage Accessories and Supplies			
25000000	Vehicles and Vehicle Accessories and Components			
26000000	Power Generation and Distribution Machinery and Accessories			
27000000	Tools and General Machinery			
30000000	Building and Construction Components and Supplies			
31000000	Manufacturing Components and Supplies			
32000000	Electronic Components and Supplies			
39000000	Electrical and Lighting Components/Accessories/Supplies			
4000000	Distribution & Conditioning Systems & Equipment & Components			
41000000	Laboratory Equipment & Supplies			
410000R5	Lab Equipment (R5)-Laser/Radiation Generating/Electron Use			
410000R6	Lab Equipment (R6) - Cabinets & Hoods & Enclosures			
410000R7	Lab Equipment (R7) - HEPA Filters			
42000000	Medical Equipment and Accessories and Supplies			
42200000	Medical diagnostic imaging and nuclear medicine products			
43000000	Information Technology & Computers & Telecommunication Equip			

Goods vs. Services

There are different item categories and codes based on whether the item being purchased is a good or a service.

<u>Goods</u> are tangible items manufactured or produced for sale. General classes of goods are:

- Biological and Chemical
- Computer
- Construction and Maintenance of Facilities
- Electrical Electronic and Fabrications

- Laboratory Equipment and Supplies
- Office Equipment and Supplies

<u>Services</u> are useful labor that does not produce a tangible product or good. Services engage the time and effort of a supplier to perform an identifiable task rather than to furnish an end item of supply. General classes of services are:

- Facility-Related Services
- Lease and Rental Services
- Personnel and Effort-Related Services
- Special and Other Services

Service Types and Dates

When Item Categories for services are selected, additional information must be entered by the requisition preparer.

Favorites Main Menu > eProcurement > Requisition									_
BERKELEY LAB - FMS	▼ Search	» Advanced S	earch						
Checkout - Review and Submit									
Review the item information and submit the req for approval.			*	My Prefere	nces 🍀 Rei	auisition Settings			
Requisition Summary				,		dalena en e e antige			
Business Unit LBNL Q Lawrence Berkeley National	Lab		Requisiti	on Name					
*Requester B_GHIORSO Q Ghiorso.William E				Priority	Medium v				
	Location 058-0106M		Type o	of Services		~			
Invoice	e Certifier	Q	Sole S	ource Flag	No Services				
	e Analyst	Q			Off Site Services	inde On Work			
*SAS	Approver	Q			On Site Srvcs No Ha				
Cart Summary: Total Amount 2,300.00 USD									
Expand lines to review shipping and accounting details	Copy Line 1 Project(s) and Activ	vity(s) to All Lines		÷	Add More Items				
Requisition Lines (?)									
Line Description Item ID	Supplier	Quantity	UOM		Price	Total	Comments [Delete	
D 1 SPECTROPHOTOMETER, MODEL ABC12	FISHER SCIENTIFIC	2	Each		550.00	1100.00	🖓 Add	Î	
" MODEL ABC12									
The second secon	FISHER SCIENTIFIC	2	Each		600.00	1200.00	🖓 Add	Î	
Shipping Line 1 *Ship To	069-0150 Q	Add Shipto Comn	nents	Quantity	2				
Address	UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY			Price	600.00	Price Adjustment			
	ONE CYCLOTRON ROAD, BLDG.								
	69 BERKELEY, CA 94720								
Attention To	Ghiorso.William B								
Due Date	iii iii iii iii iii iii iii iii iii ii								
							Services B	egin Date 3/29/17	Ħ
							Services	End Date 3/29/18	F

- The requisition preparer must select the <u>Type of Service</u> being requested:
 - No Services
 - Off-Site Services
 - On-Site Services Hands-On Work

- On-Site Services No Hands-On Work

The "Type of Services" field is explained further in the *On-Site Services* section of this guide (see page 13).

• <u>Service Begin Date</u> and <u>Service End Date</u> fields are entered when services are being purchased. The dates anticipated for the period of service are entered, since services are performed over an extended period of time. The <u>Due Date</u> field may be left blank when ordering a service but must be filled in when buying goods.

Restricted Items

There are many types of restricted items such as radioactive isotopes, fall protection equipment, microwave ovens (household; not for laboratory use), computers, headsets (noise canceling and powered), and promotional items. The Procurement Department maintains a *Restricted Items List*. This list is frequently updated and can be accessed from the Berkeley Lab homepage on the *A to Z Index* or at http://go.lbl.gov/restricted-items-list.

The Restricted Items List is broken out into two categories:

- Prohibited Items Items that the Laboratory is prohibited from purchasing with Government funds without special approval. These items may be purchased on a regular purchase order, only after DOE approval is obtained.
- Special Treatment Items These are items that:
 - Have inherent safety hazards,
 - Require special controls and/or authorizations, or
 - If handled improperly, may
 - Hurt people,
 - Harm the environment,
 - Damage equipment, or
 - Result in citations or DOE reportable occurrences

A requisition can be created for any item on the *Restricted Items List*. When the item category code entered on the ePro requisition is for a restricted item, the requisition will be automatically routed to someone who is authorized to approve or deny the purchase of the restricted item. Additionally, after the item has been received, a notification may be sent to the individual who is responsible for tracking the item. Only individuals in the Procurement Department are authorized to purchase items on the *Restricted Items List*. The item must be requested via submission of an ePro requisition with adequate justification from the requester.

Sole Source

Sole Source Reasons

In some cases, a requisition preparer is asked to enter a requisition where the requester desires to restrict competition to a single source of supply. The term used for this is sole source. A sole source is appropriate when only a single supplier can meet the requester's needs.

A written *Sole Source Justification* must be submitted to Procurement if requesting:

- A non-competitive procurement for any product or service over \$250,000. It is **NOT** required:
 - For consulting services
 - If the subcontract will be awarded to a collaborator under a successful Berkeley Lab research proposal, and the subcontractor is identified in the award notice or other documentation. In this situation, send the award notice or other documentation with your requisition.
- Research or other support from a UC Campus over \$25,000. It is **NOT** required for:
 - UC student tuition and fees remission for UC students employed by the Laboratory, generally as Graduate Student Research Assistants (GRSA), for which such remission is part of the student's compensation package
 - Joint Appointee IUTs or Multi-Location Assignments
- Items or services from another DOE Facility Contractor over \$250,000.

A sole source may be allowed for the following reasons:

- Unique capability, expertise, facilities, or equipment that no other source can provide to satisfy the Laboratory's requirements
- Compatibility with existing equipment and/or standardization of parts
- Follow-on work for continued development or enhancement of a specialized system, equipment, or services, when it is likely that award to a source other than the incumbent subcontractor would result in substantial duplication of costs (relative to overall costs) that would not be recovered or would cause unacceptable delays in fulfilling the program needs
- Identified source is acknowledged to be the leader in its field of expertise as demonstrated in reputable and valid literature, symposia presentations, etc. While normally not appropriate for

commercial goods and services, this identification may be appropriate in subcontracting for research and development.

- An unusual or compelling urgency exists that would cause an adverse or programmatic impact (generally related to schedule, security, regulatory, environmental, safety, or health issues) of such a nature and magnitude that a sole source justification is merited
- To establish or maintain a source for industrial mobilization or an essential engineering, development, or research capability
- Authorized or required by statute or international agreement
- National security or public interest
- Unique bonding, insurance, or indemnification requirements (applies if a Large Business is selected in lieu of a Small Business)
- Services of an expert or neutral person for any current or anticipated litigation or dispute

The following reasons are not acceptable justifications for restricting competition to a sole source:

- Administrative convenience of the Laboratory
- Belief that one particular supplier can provide the goods and/or services at the lowest cost
- Unsolicited proposals, unless it provides unique approaches that are unavailable from other sources and is required by the Laboratory
- Contention that a subcontractor is uniquely qualified when such contention is not supported by facts, but only by opinions or assumptions
- Evidence of poor planning and if the action cannot pass the test of a valid non-competitive action

Sole Source Documentation

Home	Our Services	Contact Us	Forms	FAQs	OCFO Home	Office of the Chief Financial Officer
Sole Sourcing						Sole Source Justification (Competence Justifica
	100 March 100 Ma	source the best supplier	0	EPRO		or other documentation from the sporsor. In these situations, please send the award notice or other sporsor documentation with your requisit situations, generally the research collaborator has one of the characteristics in section 2.3 below.)
and services Berkeley La competitive sourcing wh	1. 4.	ırchase. To do this well, v	ve conduct	🕈 ePro Home		The Requested Procurement: Requester: Requisition No.:
such cases Procuremen	will need a written justi	at can only be met throug fication to document the requirement applies for	criteria for bypassing	Manage My Orr ePro Returns C Strategic Sourc Master Agreem Sala Sources	ienter ing	Recommended Source:Estimated Cost/Price: Description of the items or services to be procured (including any important/unique features and minimum requirements). Thi should not discuss the proposed Subcontractor and their capabilities. This section is solely for the purpose of describing the ne
IUTs or multi location	assignments) om another DOE Facility	over \$25,000 (not requir Contractor over \$250,00		 Sole Sourcing Competitive So Purchasing Lim ePro Roles Technical Represent To 	nit Requirements esentative	Reason(s) for the Requested Sole Source Procurement (select only one from 2.1, 2.2, or 2.3 below): If <u>For UC Compus Research or Supporting Efforts over \$25,000</u> The Compus has a special or unique capability to perform the intended research or provide the intended support, as a below:
	re not to be used to avo le circumstances and if	id competition, but rathe the criteria are met.	r to expedite a	EPRO TOOLS		2.2 For Goods or Services from another DCE Facility Contractor (such as another national laboratory) over \$250.000 4.5 explained below: Are no DCE Facility Contractor has special or unique experience or equipment to perform work that is not readily avail
Sole Source Just	fication Criteria			Customer Guid Purchasing Gui Restricted Item	ide	commercial source. contraction for the work to be performed is consistent with the scope of the performing contractor's Prime Contract of Any effort to be subcontracted by the DOE Contractor will be incidential to the good/zervices to be provided to LE

The requester and the buyer must work together to assure that the sole source justification is appropriate and defensible. The written sole source justification must address the following information, as applicable:

- A description of the items or services to be procured (including any important/unique features and minimum requirements)
- The reason(s) for the request with a narrative explanation of why the subcontractor, Campus, or DOE Facility Contractor is the only qualified source, based on the identified reason(s), including a description of any unique capabilities, expertise, processes, or facilities
- Separate analysis, including any market research that the requester might have performed to support their conclusion. Documentation could include proposals received, email correspondence, etc. If market research was performed, a list showing the requirements, each prospective supplier identified/contacted, and all suppliers who did not meet the requirements (and which requirement each failed to meet) is helpful.
- Whether there is potential for follow-up purchase(s) that would have to be from the same source

The requester must complete and submit the *Sole Source Justification* form to Procurement. This form and additional information regarding Sole Sourcing can be found on the Procurement and Property Management website on the <u>Make a Purchase</u> page.

The form is also provided under the "Forms" link on the Procurement & Property Management website at <u>http://procurement.lbl.gov</u>.

To expedite processing the requisition, attach the *Sole Source Justification* form, if required, to the ePro requisition.

On-Site Services

Berkeley Lab has controls in place to assure that supplier personnel who do hands-on work at LBNL facilities do so in a safe manner, in compliance with applicable safety procedures, and using the Lab's *Subcontractor Job Hazard Analysis* (sJHA) process shown at the <u>LBNL sJHA website</u>.

Type of Service Field

Favorites Main Menu >> eProcurement >> Requisition	
BERKELEY LAB - FMS	>>> Advanced Search
Checkout - Review and Submit Review the item information and submit the req for approval. Requisition Summary	* My Preferences 🗱 Requisition Settings
Business Unit LBNL C Lawrence Berkeley National Lab *Requester B_GHIORSO C Ghiorso,William B *Currency USD *Deliver To Location 058-0106M Invoice Certifier Resource Analyst *SAS Approver	Requisition Name Priority Medium Type of Services Image: Construct of Services Sole Source Flag No Services Off Site Services Off Site Services Hands On Work On Site Srvcs No Hands On Work On Site Srvcs No Hands On Work

Requisitions for services must indicate the Type of Service that is being acquired. Select:

- <u>No Services</u> when there are no services being provided by the supplier (only goods will be sent)
- <u>Off-Site Services</u> when the supplier will only be providing services at an off-site location (a location other than a Berkeley Laboratory/DOE site)
- <u>On-Site Services Hands-On Work</u> when a supplier will be providing any hands-on services on-site at the Laboratory's Hill or at Berkeley Lab-leased/licensed facilities. This kind of work requires a *Subcontractor Job Hazard Analysis* (sJHA). A unique sJHA link is pasted into the ePro requisition. This work can involve:
 - Use of hand or power tools
 - Repair or service of a device, apparatus, machine, or mechanism
 - Material handling (except delivery of purchased items)
 - Handling or disposing of a chemical, compressed gas, or hazardous, radioactive, or biohazardous material
 - Construction and related real property modifications/improvements

- <u>On-Site Services No Hands-On Work</u> when the supplier will not be providing hands-on services at a Berkeley Lab facility. This kind of work does not require an sJHA and can involve:
 - Office and administrative work
 - Computer programming
 - Attending or making a presentation
 - Supervision of a worker(s) who is not performing hands-on work
 - Document archiving
 - Financial auditing
 - Photography
 - Language translation
 - Providing classroom training
 - Hardware and software maintenance

Subcontractor Job Hazard Analysis (sJHA)

For requisitions for on-site, hands-on work, the subcontractor must complete a *Subcontractor Job Hazard Analysis* (sJHA) form that identifies scope of the work, hazards, and controls.

_	× ^		
	u 🕅	If you have any questions about completing this form, please contact your Division Safety Coordinator or the SJHA Program Manager, Bill Wells at 486-6325.	
	LEY LAD		
	ersion 2.0.0	1. Identification	
	Home	Save Create PDF without Dates	
	Create New SJHA		
	Search SJHAs	Subcontractor Job Hazards Analysis and Work Authorization Form for Non-Construction Activities Performed at LBNL Facilities	
2	My SJHAs		
2	Lab-wide SJHAs	* Division: -Select	
	GERT Completions	Subcontractor Details: (Contacts, email, fax, etc)	
	Blank SJHA Form		
=	Process Overview	M	
22	Contacts		
8	Training	To be prepared by the LBNL Requester / Division	
2	Frequently Asked Questions	To request a new subcontract for on-site services involving hands-on work, the LBNL Requester must complete this section of the form and attach it to the requisition that is submittee	d to
6	Guidance by Role	Berkeley Lab Procurement. This form may also be used for guests who work without a subcontract with LBNL. If you have any questions about completing this form, please contact yo Division Safety Coordinator or the Program Manager for Non-Construction Safety Assurance at (510) 486-6325.	our
6	Permits	* Lab-wide SJHA: Yes No	
	Pub-3000	* Anticipated Work Start Date:	
	Subcontractor Email Template		
4	Logout	* Requester: (Last, First) Phone: Email:	
	in as John Speros (845388)	* Scope of Work (Doing what, where, with what materials):	
User			
			1
		Requisition No.: (optional) PO No.: (optional)	-
		Job Location (Building): -Select-	- I
		Save Create PDF without Dates	

• The requester creates a new sJHA form by going to http://sjha.lbl.gov. This website creates a unique link for the subcontractor to access and complete the sJHA. The requester sends this unique link to the requisition preparer. It is also recommended that the requester send the link to the subcontractor.

- The requisition preparer enters this unique link into the ePro requisition. *The link should be placed in the Comments box for Requisition Line 1.*
- The buyer includes an article in the subcontract asking the subcontractor to complete and submit the form utilizing the unique link.
- A pre-job meeting is held between the requester/division and the subcontractor. The sJHA and the EH&S Non-Construction Safety Orientation are discussed and the hazard level for the work is determined.

The EH&S sJHA website provides additional guidance on the process. The left-hand links to Process Overview, Frequently Asked Questions, and Guidance by Role (Requester, Requisition Preparer, Procurement Buyer, Division Safety Coordinator, and Subcontractor) are particularly useful.

Approval Thresholds

Confirmation	
✓ 100000200 has been routed for further appro	val.
Review/Edit Approvers	
Division Approval	
Requisition 100000200:Approved	() View/Hide Comments
Requestor's Division Approval	v
Approved Montgomery,Kelly L LBNL Division Approver 07/31/14 - 11:37 AM	
Comment History	
Division Project Approval	
Requisition 100000200:Pending	💬 View/Hide Comments
Requestor's Div Proj Approval	
Pending Consenquist, Gregory J LBNL Division Project Approver	
Comment History	
SAS Dollar Amount Approval	
•••	
Requisition 100000200:Awaiting Further	Approvals (=) View/Hide Comments
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Requisition 1000000200:Awaiting Further SAS Dollar Amount Approval Not Routed Williams.Kim P LBNL Requisition Approver(SAS) Comment History	Approvals (=> View/Hide Comments
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Requisition 1000000200:Awaiting Further SAS Dollar Amount Approval Not Routed Williams.Kim P LBNL Requisition Approver(SAS) Comment History Req Line Category Approval Line 1:Initiated Asbestos siding	
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Once ePro and eBuy requisitions are created, they are subject to the approval "workflow" process where one or more approvers must log into FMS and approve or deny the requisition before it can proceed to the next stage: being made into a purchase order (PO) that is sent to the supplier to fulfill.

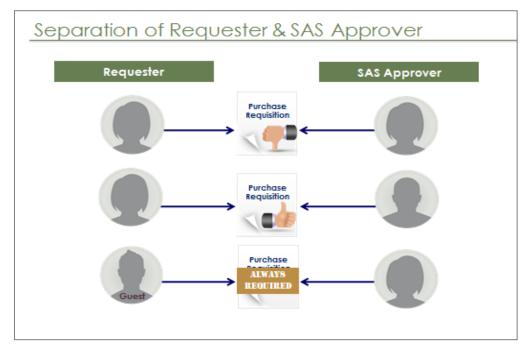
An approval threshold, in simple terms, is a dollar limit that, when exceeded, requires approval. Divisions establish their own requisition approvals for requisitions that are billed to their projects. Approvals are required when the total requisition amount exceeds the established approval thresholds. ePro automatically routes requisitions to these approvers. The system will also insert additional item category approvers for items like radioactive isotopes that require special approval.

A requisition may require up to five separate approvals, based on thresholds:

- 1. <u>Division Approval</u> may be required when a division wants all requisitions routed to a certain division approver, regardless of requisition amount. This allows the division to maintain centralized control over all requisitions being issued.
- 2. <u>Division Project Approval</u> may also be required when a division wants to have all of its requisitions routed to the named individuals on its projects for requisitions with over \$1,000 charged to their projects.
- Signature Authorization System (SAS) Dollar Amount Approval is required for all requisitions over \$1,000. Here, the requisition preparer selects a division approver from the Signature Authorization System (SAS) with sufficient dollar authority in SAS to cover the total requisition amount.
- 4. <u>Requisition Line Item Category Approval</u> is required for item category codes that require routing to EH&S or other departments for approval. These items may only be purchased when specified requirements are met related to controls or safety measures.
- 5. <u>OCFO Division Management Approval</u> is added for requisitions over \$500,000 and routed to a high-level financial group reviewer for approval. The approver is assigned by the system based on the division assigned to the project for the highest dollar amount on the requisition.

In ePro, requisitions exceeding the approval thresholds will automatically be routed to the assigned approver. After entering any required SAS approvers, requisition preparers monitor their requisitions to be sure approvals are progressing. Requisition preparers should familiarize themselves with their division approval thresholds so they are aware of the potential extra time it could take when additional approvals are required.

Separation of Requester & SAS Approver



In order to avoid a conflict of interest, the requester and the SAS dollar amount approver cannot be the same person when the requisition total amount is greater than the threshold established by the division. In this case, the requisition must be routed to an authorized signer/approver in SAS with sufficient dollar authority for the requisition amount and who is not the requester.

In addition, if the requester is a "Guest" or "Affiliate" the requisition must always (regardless of dollar amount) be routed to an approver who has sufficient signature authority as shown in SAS.

A requester and requisition preparer may be the same, however, regardless of approval thresholds.

Module 2 - Creating and Approving ePro Requisitions

Module 2 will discuss the specifics of creating, viewing, approving, and maintaining requisitions in ePro as well as creating a *PO Modification Request*.

After logging into FMS, you create an ePro requisition through these basic steps (discussed in detail in this module).

- 1. Navigate to eProcurement | Requisition | Create Requisition
- 2. On the *Item Entry* screen, enter one or more requisition lines with details that include the item category, description, quantity, estimated price, unit of measure, and supplier for each item. When done, click the "Add to Cart" button, then the "Checkout" button.
- 3. On the *Checkout Review and Submit* screen:
 - In the Requisition Summary section, enter a requester and deliver-to location. If required, also enter a SAS approver, type of service, and whether a sole source applies.
 - In the Requisition Lines section, enter line comments/attachments, Project, Activity, and due date or service start/end dates.
 - Click the "Save & Submit" button at the bottom to complete the requisition and send it to the approver(s).

Accessing eProcurement (ePro)

Log in to FMS

Access ePro through the Laboratory's Financial Management System, also known as FMS. FMS is comprised of a standard Oracle/PeopleSoft software product that has several modules including ePro, Accounts Payable, Project Costing, General Ledger, and Grants.

To access FMS, use a web browser like Firefox, Internet Explorer, or Safari. (Recommend using Firefox as a first choice. Do not recommend using Chrome) When entering data in FMS, do not use the browser's back and forward buttons, or you risk losing data you have entered. Instead, follow the "breadcrumb" links in FMS to navigate to other screens.

Go to FMS by typing <u>http://fms.lbl.gov</u> into your browser's address bar and hitting "Enter".

Click the "Please click here to PeopleSoft logon page" link.

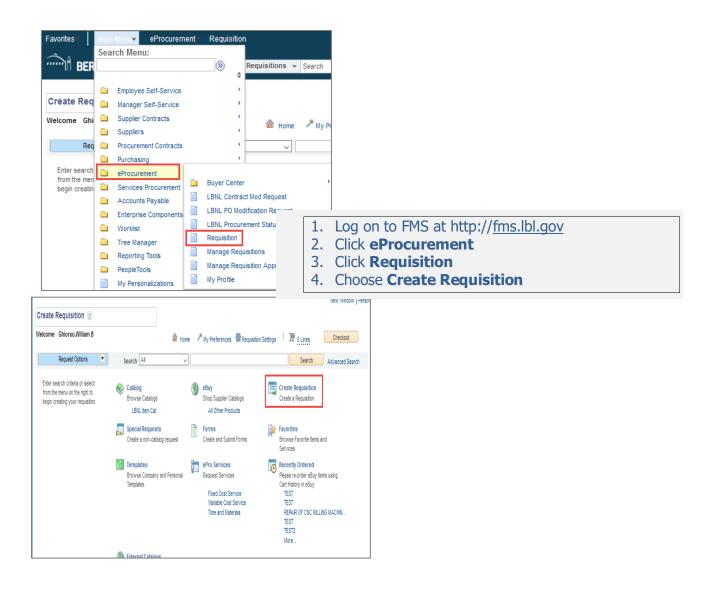
At the login screen, enter your LDAP (email) User ID, Password, and MFA [if enabled].

When you see the "Processing" icon, please wait while FMS processes your commands.

Many screens have a "Business Unit" box defaulted to LBNL. You may leave this value as LBNL.

Navigate to Create Requisition

To create an ePro requisition, click "eProcurement" in the menu on the left side of the screen. When the eProcurement screen opens, click "Requisition", and then choose "Create Requisition." The Manage Requisitions option, which will be discussed later, is also available from the *eProcurement* screen.



Remote Access:

For security, FMS/ePro is only accessible on LBLnet. If you are working off-site, you can get onto LBLnet using *Virtual Private Network* (VPN) software or by establishing a *Remote Desktop Connection* to your work computer.

- VPN technology provides a secure connection for remote access users. LBNL-VPN is a software-based VPN service. Employees wishing to use LBNL-VPN must install the Cisco VPN client software on their computer. This software is provided free to Laboratory employees at the Berkeley Lab <u>Software Download Page</u>.
- With *Remote Desktop Connection*, you get full, secure access to your work computer via an Internet or network connection. System requirements to use Remote Desktop and instructions on making a connection are provided on <u>IT's Remote Access webpage</u>. In order to connect, your computer at the Laboratory must be left on and set to never go to sleep.

Create Requisition

Requisition Line Details

Favorites-	Main Menu -	eProcur	rement* → Requisi	ition						
	RKELEY LA	B - FM	s I	All - Search	» A	dvanced Search			Home Worklis	t Add to Favorites Sign out
										New Window Personalize Page
Create Re	equisition 👔									
Welcome G	Shiorso,William B			💩 Home 🏓	My Preferences 🛛 🗱 Requisition Settin	gs 🎘 O Line	Ch	eckout		
R	lequest Options		Search All	~		Sea	rch Advar	nced Search		
All Req	quest Options		Item Entry 👔			Restricted Item L	ist			
Catalog			Line					Find View All 💷 🔜	First 🕚 1-2 of 2	Last
	NL Item Cat		Details [::::)							
eBuy All (Other Products		Category	Item ID	Description	Quantity	UOM Price	Supplier ID Suppl	ier Name	
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Specia	I Requests		2 811017EQ Q		A Maintenance and Repair 🔐	2	EA Q 60	00.00 000000237 Q FISHE	R SCIENTIFIC	•
Forms										
Favorit	tes		Add to Cart							

When you click the "Create Requisition" link in the Requisition menu, you are taken to the *Item Entry* screen, where you enter Line Details. For <u>each line</u>, you must enter information in most of the fields so you can advance to the next screen.

Note: Do not use the **Requisition Settings** feature to fill in the Project. This feature will not autofill the Project to all of the PO lines. To apply one Project and Activity for an entire order see the instructions that begin on page 85.

• In the <u>Category</u> field, either type in an item category code or use the lookup ⁴ icon to search for a category that most closely describes the line.

A link to the most recent <u>Item Category Codes List</u> and the <u>Restricted Item List</u> are available for your convenience.

- Leave the <u>Item ID</u> field blank, unless directed by the buyer.
- In the <u>Description</u> field, enter a noun describing the item, followed by the part/model number, and then the manufacturer. To view a bigger box in which to type, click the icon to the right of the Description box.

Note: This field is limited to 254 characters.

- Enter the <u>Quantity</u> or the number of items you want to buy for that line.
- Select a Unit of Measure (<u>UOM</u>) that describes how the items are sold. Normally, EA (each) can be used for most items. However, for example, if the supplier sells items per foot, enter FT.

- The <u>Price</u> is the estimated price for the item by Unit of Measure. ePro multiplies the Quantity times Price to get the total requisition line amount.
- Use the <u>Supplier ID</u> to select a supplier for the products or services. This is an optional field and can be left blank and entered after you add the lines to your Cart. To enter a supplier here, use the lookup icon next to the field. In the Look Up Supplier ID screen, select "contains" from the drop down next to the "Short Supplier Name" field, enter the search text, click the "Look Up" button, and then click on the applicable supplier name. To copy the <u>Supplier ID</u> to all of the lines of the requisition, follow the instructions on Copying Other Data to Lines that begins on page 90.

Look Up Supplier ID							
			Help				
SetID SHARE							
Supplier ID begins with v							
Short Supplier Name contains VZEISS							
Look Up Clear							
View 100		First ④	1-6 of 6				
Supplier ID Short Supplier Name	Supplier Name	Additional Name	Our Custome Number				
000000023 CARL ZEISS INC	CARL ZEISS INC	(blank)	(blank)				
0000042847 CARL ZEISS-00		(blank)	(blank)				
	CARL ZEISS INDUSTRIAL METROLOGY LLC						
	CARL ZEISS MICROIMAGING LLC	(blank)	(blank)				
	CARL ZEISS MICROSCOPY LLC	(blank)	(blank)				
0000057044 CARL ZEISS-010	CARL ZEISS SMT GMBH	(blank)	(blank)				
<			>				

Note: It is recommended that the requisition be prepared for award to a single supplier. If known, the supplier should be identified on each line.

• If the supplier is not in FMS, you can suggest a new supplier using the Comment area on the *Checkout* screen.

Note: If you inadvertently enter information in a field and want to abandon it, you should delete its contents so you can proceed to the next screen. If you enter invalid information, the field will turn red. Deleting its contents restores the box's background to white so you can continue.

Note: Include freight information in the Requisition Comments (see page 34). Do NOT add a separate line in the PO for freight.

To add additional lines to your requisition, click the plus $\textcircled{\bullet}$ icon on the right side of the last requisition line. This adds a new row where you can enter details for a new line.

When you are finished creating requisition lines, click the "Add to Cart" Add to Cart button. This adds your lines to the requisition. Use the Shopping Cart 2 o Lines icon/link to get a quick view of requisition items already in your shopping cart.

Once you have clicked the "Add to Cart" button and you have added all your requisition lines to the requisition, click the "Checkout" Checkout button. This takes you to the Checkout – Review and Submit screen.

Checkout Screen

Finish your requisition on the *Checkout – Review and Submit* screen. The *Checkout* screen has the following sections, shown as you scroll down the screen:

- <u>Requisition Summary</u> (at the top of the screen)
- Cart Summary/Requisition Lines
- <u>Requisition Comments and Attachments / Comments to Approver</u>

Requisition Summary

Favorites Main Menu > eProcurement	Requisition			
ERKELEY LAB - FMS	All - Search	Advanced Search	Home Worklist	Add to Favorites Sign out
				New Window Personalize Page 🔺
Checkout - Review and Submit				
Review the item information and submit the req for appro	oval.	My Preferences Requisition Settings		
Business Unit LBNL Q Lawrence	Berkeley National Lab	Requisition Name		
	Shiorso, William B	Priority Medium 🗸		
*Currency USD	*Deliver To Location 058-0106M	Type of Services 🗸 🗸		
	Invoice Certifier	Q Sole Source Flag No V		
	Resource Analyst	Q		
	*SAS Approver]Q		
Cart Summary: Total Amount 2,300.00 USD				

Here is how to enter information in the Requisition Summary fields.

- <u>Business Unit</u>: This defaults to LBNL and cannot be changed.
- <u>Requester</u>: This defaults to the requisition preparer. Change it to the person requesting the goods or services if the requester is not the requisition preparer. The requester can be anyone with an LBNL email address. To change the requester, enter the new requester's LDAP email name or look up the requester as follows:

Favorites Main Menu eProcurement Requisition	
BERKELEY LAB - FMS	Advanced Search
Checkout - Review and Submit Review the item information and submit the req for approval.	My Preferences Requisition Settings
Business Unit LBNL Lawrence Berkeley National Lab *Requester SANCHEZ Sanchez,Ignacio *Currency USD *Deliver To Location 076-0240 Q Invoice Certifier Q Resource Analyst Q *SAS Approver Q	Look Up Requester Requester Contains Sanchez Look Up Clear Cancel Basic Lookup Search Results View 100 First 1-3 of 3 Last Requester Name
Cart Summary: Total Amount 2,300.00 USD Expand lines to review shipping and accounting details Copy Line 1 Project(s) and Activity(s) to All Lines	ISANCHEZ Sanchez,Ignacio MFSANCHEZ Sanchez,Manuel F MVORTIZSANCHEZ Ortiz Sanchez,Martha Vero

- Click the lookup sicon to next to the "Requester" field. This takes you to the Look
 Up Requester screen.
- Change its drop-down box to "contains."
- Type the requester's last name and click the "Look Up" button.

- Click on the requester's name you want. The requester's LDAP name will be transferred to the *Checkout* screen's "Requester" box and the requester's Lab building and room will be transferred to the "Deliver To Location" box.
- Answer "Yes" to the box that says, "Changing Requester will change the default settings."
- <u>Currency</u>: This defaults to U.S. dollars and cannot be changed.

Favorites Main Menu > eProcurement > Requisition	
BERKELEY LAB - FMS	Advanced Search
Checkout - Review and Submit Review the item information and submit the req for approval. Requisition Summary	My Preferences 🔅 Requisition Settings
Business Unit LBNL C Lawrence Berkeley National Lab *Requester ISANCHEZ Sanchez Ionacio *Currency USD *Deliver To Location 076-0240 Q Invoice Certifier Q Resource Analyst Q *SAS Approver Q	Requisition Name Priority Medium Type of Services Sole Source Flag No
Cart Summary: Total Amount 2,300.00 USD	

• <u>Deliver To Location</u>: This defaults to the requester's directory location. Change this location if goods are to be delivered to a different LBNL building and room. Locations are entered in the format of three numbers for an LBNL building (and perhaps a letter), followed by a dash, and then followed by four numbers for the LBNL room number (and perhaps a letter).

Example: 050B-1217A

Use the search tool to find valid Lab locations.

<u>Invoice Certifier:</u> If the invoice needs to be certified, type in the individual's last name. A list of certifiers will be displayed. You can use the search function to look up a valid employee name. When a purchase order is set up for certification, the certifier receives an email allowing the certifier to approve a supplier's invoice before Accounts Payable pays it. Invoice certification may be required for services in excess of \$5,000 or based upon the item category (e.g., software, design and construction, fabrication, consultant/personal services, research and development, and subcontracts that have quality assurance requirements, complex equipment configuration, and/or payment milestones). See the <u>LBNL RPM section on Invoice Certifications</u> for more information about the certification process.

Note: If software is being requested, an invoice certifier must be identified in this field, since software is generally not delivered to Receiving.

- <u>Resource Analyst:</u> If required by your division, enter a resource analyst by typing the individual's last name into the field. A list of resource analysts will be displayed from which to select. Alternatively, use the search function to look up a resource analyst. A resource analyst assists the division with financially administering its purchases.
- <u>SAS Approver:</u> An authorized signer (SAS approver) must be entered for requisitions over \$1,000. When this box appears, enter a SAS approver from your division with sufficient dollar authority to cover the requisition total amount. The SAS approver cannot be the requester.

Home Home Checkout - Review and Submit	
Checkout - Review and Submit	
Review the item information and submit the req for approval. My Preferences Requisition Summary Requisition Summary	My Preferences Requisition Settings
Business Unit BNL Lawrence Berkeley National Lab *Requester SANCHEZ Sanchez, Ignacio *Currency USD *Deliver To Location 076-0240 Invoice Certifier Resource Analyst *SAS Approver Jones, Andrew D Cart Summary: Total Amount 2,300.00 USD	Priority Medium Type of Services On Site Services Hands On Work Sole Source Flag No

- <u>Requisition Name</u>: This field is optional and can be left blank. It can be used to help identify the requisition for the requester. If left blank, the requisition number, instead of the name you enter in this field, is displayed on the *Manage Requisitions* screen and other reports.
- <u>Priority</u>: This defaults to *Medium* but can be changed to *Low* or *High* so Procurement can be informed of the urgency of the requisition.
- <u>Type of Services</u>: This box appears when a service-related requisition line has been entered. Select one of the four values discussed earlier:
 - No Services
 - Off Site Services
 - On Site Services Hands-On Work
 - On Site Srvcs No Hands-On Work
- <u>Sole Source:</u> Select "Yes" if this should be a sole source procurement; otherwise, select "No." See page 10 for details on sole source requisitions.

Cart Summary / Requisition Lines

On the *Checkout* screen, scroll down to the *Cart Summary / Requisition Lines* area (see screenshot on page 30). Notice that each requisition line you entered is shown. Review each line for accuracy. Click the item's "Description" link to make any needed edits to the line's Description or Price.

Dates and Accounting Information

You must provide additional information in this section for each requisition line you created:

- <u>Due Date</u>: When the item is for goods, enter the date you would like to receive the goods. To copy the due date name to all of the lines of the requisition, follow the instructions on **Copying Other Data to Lines** that begins on page 90.
- <u>Services Begin Date / Services End Date:</u> When the item is for services, enter anticipated service dates in these two fields. The Due Date should be left blank when you enter Services dates.
- <u>Project</u>: Type in the Project that is funding the purchase. Use the lookup sicon to help locate it.
- <u>Activity:</u> Use the lookup icon to select the Activity associated with the Project. If needed, see your division's resource analyst for assistance in entering the Project and Activity.

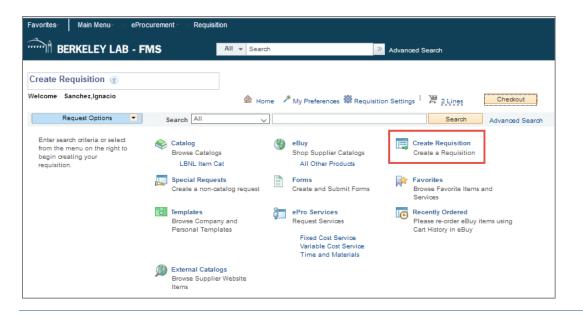
Note: See page 85 for instructions on applying the same Project / Activity for an entire order.

To delete a line, click on the checkbox next to each line you want to delete and then click on the trash can a icon in the upper right area.

To add a new line, click on the "Add More Items" button.

This will take you back to the main Create Requisition page where you need to click on the "Create Requisition" link and then add the lines as you did when you started the requisition.

Cart Summary: Total Amount 2,300.00 USI	D						
Expand lines to review shipping and accou	unting details	Copy Line 1 Project(s) and Activity	(s) to All Lines	Add More	tems		
Requisition Lines 👔				L			
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Comments Delete
SPECTROPHOTOMETER, MODEL ABC12		FISHER SCIENTIFIC	2	Each	550.00	1100.00	O Add
Shipping Line 1	*Ship To Address Attention To	069-0150 UC LAWRENCE BERKELEY LI FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDC. 69 BERKELEY, CA 94720 Ghiorso.William B	Add Shipto Cor	mments Quantity Price		Price Adjustment	
	Accounting Lines	03/29/2017 関					
	*Distribute By	Qty 🗸		*Liquidate By	Amt 🗸		
	Accounting Lines			Personalize	Find View All	쾨 🔜 🛛 First 🕚 1 of	1 🛞 Last
	Chartfields1 C	hartfields2 Chartfields3 D	etails De <u>t</u> ails 2	Asset Information	Asset Information 2	2 <u>B</u> udget Information	
	Quantity	PC Bus Unit Project		Activity		Percent	
	2	LBNL Q 100117		٥ 002		م 100.0000	• •
		FISHER SCIENTIFIC	2	Each	600.00	1200.00	🖓 Add 🗊
Shipping Line 1	*Ship To Address	069-0150 Q UC LAWRENCE BERKELEY LA FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG, 69 BERKELEY, CA 94720	Add Shipto Com B	ments Quantity Price	2 600.00	Price Adjustment	
	Attention To Due Date	Ghiorso,William B	:	Services Begin Date Services End Date			
,	Accounting Lines						
	*Distribute By	Qty 🗸		*Liquidate By	Amt 🗸		
	Accounting Lines				e Find View All	-	
			etails De <u>t</u> ails 2	Asset Information	Asset Information 2		
	-	PC Bus Unit Project		Activity		Percent	
	2	LBNL Q 100117		Q 002		Q 100.0000	+ -
Select All / Deselect All	Select lines to:	Add to Favorites 🛛 🖗 Ad	d to Template(s)	🗍 Delete Select	ed		



Splitting Projects

art Summary: Total Amount 2,300.00 US	D					
Expand lines to review shipping and acco	unting details	Copy Line 1 Project(s) and Activity(s) to All Lines Add More	Items		
Requisition Lines 👔						
Line Description	Item ID	Supplier	Quantity UOM	Price	Total	Comments Delete
D1 P SPECTROPHOTOMETER, MODEL ABC12		FISHER SCIENTIFIC	2 Each	550.00	1100.00	🖓 Add 📋
Shipping Line 1	*Ship T	069-0150	Edit Shipto Comments Quantity	2		
	Addres	 UC LAWRENCE BERKELEY LAI FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG, 69 BERKELEY, CA 94720 	B Price	550.00	Price Adjustment	
	Attention 1	Ghiorso,William B	Click Split Cost Amon	a Projects bu	itton to specify	multiple
	Due Dat	e		rchasing entitie		manapic
	Accounting Lines					
	*Distribute B	y Qty 🗸	*Liquidate By	Amt 🗸		
	Accounting Lines		🔣 🛛 First 🐠 1 o	f 1 🕑 Last		
	Chartfields1	Chartfields2 Chartfields3 Det	Budget Information			
	Quantity	PC Bus Unit Project	Activity		Percent	_ 1
	2	LBNL Q 100117	Q 002		Q 100.000	D 🛨 🖃
	Assign	percentages to allocate c	listribution of payment resp	oonsibility.		
	*Distribute	By Amt	*Liquidate By	Amt 🗸		
	Accounting Line			Find View All 💷	First 🕚 1-2 of	2 🚯 Leet
	<u>Chartfields1</u>		etails Details 2 Asset Information		Budget Information	
	PC Bus Unit	Project	Activity		Percent	
	LBNL Q	100117	Q 002	Q	75.0000	• -
	LBNL Q	100119	Q 541	Q	25.0000	+ -

If you want to split costs among two or more Projects, do the following for each requisition line you want to split:

- 1. Change the Distribute By from "Qty" (Quantity) to "Amt" (Amount).
- 2. Reduce the first Project's Accounting Line to the percent OR quantity you want to be charged. For example, reduce 100% to 75%.
- 3. Next, click the plus sign to the right of its Accounting Line. This will add a new row with the balance of the requisition's line total.
- 4. Enter the Project and Activity for the newly added line.

5. When you click the "Chartfields1 Tab, you will see a Merchandise Amount column where you can enter a dollar amount to be charged to each Project and Activity.

All Accounting Lines must add up to either the total Quantity of that requisition line or its total Amount.

	*Distribute By	Amt	~		*Liquidate E	By Amt	\sim			
Accou	nting Lines				Personalize	e Find V	iew All 🗖	🔣 💿 First 🕚 1-2 of 3	2 🛞 L	ast
CI	hartfields1 C	hartfields2	Ch <u>a</u> rtfields3 Det	ails De <u>t</u> ails	2 Asset Information	Asset I	nformation	2 <u>B</u> udget Information		
Line	Status	Dist Type	*Location		Merchandise Amt	GL Unit	En	try Event		
1	Open		076-0240	Q	825.00	LBNL	Q	Q	+	
2	Open		076-0240	Q	275.00	LBNL	Q	Q	+	Ξ

To delete an Accounting Line, click the blue minus icon on the right of the line.

Facilities Division - Entering Maximo Work Order # and Associated Project/Activity

When completing the Checkout Summary, if a requisition is for goods or services on a Maximo Work Order, the requisition preparer must also enter the Work Order number in addition to the Project /Activity. The following steps should be taken.

- Always ask the requester if the requisition is associated with a Work Order.
- Before preparing the requisition, if you only know the Maximo Work Order number, you must first log into Maximo and look up the Work Order to determine the Project and Activity associated with that Work Order.
- Enter the Project and Activity associated with the Maximo Work Order in the requisition.
- Before exiting the *Checkout Summary* screen, click the "Chartfields3" Tab. A new screen will open.
- Go to the input field labeled "Order Number" and enter the Work Order number.

Accounting Lines		•		Personalize Find View All	🔜 🛛 First 🛞	1 of 1 🛞 Last
Chartfields1 Chartfield	s2 Chartfields3	Deta	ils De <u>t</u> ails 2 <u>A</u> sset I	formation Asset Information 2	Budget Informat	tion 💷
Product	Source Type		Category	Subcategory	Order Number	
٩	SRVCS	Q	20500 Q	Q	Q	+ =

Shipping Information

Expand line:	s to review shipping and account	ting details		Copy Line 1 Pro	oject(s) and Ac	tivity(s) to	All Lines	÷	Add More It	ems					
Requisitio	n Lines 🕜														
Line	Description	Item ID		Supplier			Quantity	UOM		Price	Tota	al de la companya de	Comr	ments (Delete
▼ 🗆 ¹ 🤗	SPECTROPHOTOMETER, MODEL ABC12			FISHER SCIEN	VTIFIC		2	Each		550.00	1100.	00	\bigcirc	Add	Î
	Shipping Line 1		*Ship To Address Attention To Due Date	069-0150 UC LAWRENC FOR THE US E ONE CYCLOTF 69 BERKELEY, CA Ghiorso,Willia	DEPT. OF ENE RON ROAD, B A 94720	RGY ILDG.	Add Shipto Co	mments	Quantity Price	2	Pric	e Adjustment			
		 Accountin 	g Lines Distribute By	Qty	~				iquidate By	Amt ~					
		Accounti		any	-					Find View All	۵ ا	First 🕚 1 of 1	€ La	ast	
			-	artfields2 Ch	n <u>a</u> rtfields3	<u>D</u> etails	Details 2	Asset Inform		et Information 2		formation			
		Quantity		PC Bus Unit	Project				Activity			Percent			
			2								Q	100.0000	+	-	

On the *Requisition Lines* section of the *Checkout* screen above, shipping information is prefilled.

• The <u>Ship To</u> field shows the address where the supplier will deliver the item (Bldg. 69, JGI, etc.). After the item is received, LBNL Transportation will deliver it to the "Deliver To Location" shown in the *Requisition Summary* section of the *Checkout* screen.

Use the lookup $\stackrel{<}{\triangleleft}$ icon to look up the applicable Ship To address:

Look Up Ship) То
SetID:	SHARE
Ship To Locatio	n: begins with 🧹
Description:	begins with 🗸
Look Up	Clear Cancel Basic Lookup
Search Result	S
View 100	First 🚳 1-7 of 7 🕑 Last
Ship To Location	Description
000-0001	NO DELIVERY
069	WILL CALL-BUILDING 069
069-0150	LBNL MAIN RECEIVING
079-0101	METAL STORES B79
400	JGI RECEIVING
943	LBNL COMPUTING CTR - OAKLAND
BNNL	eBuy-BROOKHAVEN LABORATORY

To copy the <u>Ship to</u> address to all of the lines of the requisition, follow the instructions on **Copying Other Data to Lines** that begins on page 90.

• The <u>Attention To</u> field should show the name of the requester or individual to whom the item will be delivered. It is important that this be filled in correctly so Receiving can contact the right person regarding the delivery. This field defaults to the requisition preparer.

To copy the <u>Attention to</u> name to all of the lines of the requisition, follow the instructions on **Copying Other Data to Lines** that begins on page 90.

• The <u>Add Ship To Comments</u> link lets you add comments to your order if you want to communicate with the supplier or with the Receiving department. You can also add ship-to

comments and attachments pertinent to the line by using the line's Comments \bigcirc icon. An example of a ship-to comment might be "Please make sure my order arrives by Monday, August 4th" or "My colleague Jane Doe will be there to sign for the package."

• Do not enter anything in the <u>Price Adjustment</u> link.

Checkout - Review and Submit							
Review the item information and submit the	req for approval.		*		205		
Requisition Summary				My Preferences	Requisition Se	ttings	
	wrence Berkeley Nation			Requisition Nam			
*Requester ISANCHEZ	Sanchez,Ignac	o Location 076-0240			y Medium 🧹		
*Currency USD			-	Type of Servic	es On Site Services	Hands On Work 🗸	
		e Certifier	Q	Sole Source FI	ag No 🗸		
		e Analyst	ADJONES				
	*SAS	Approver Jones, Andrew D	Q ADJONES				
Cart Summary: Total Amount 2,300.00 USD							
Expand lines to review shipping and account		Copy Line 1 Project(s) an	d Activity(s) to All Lines	🕆 Add Mo	re Items		
Requisition Lines							
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Comments Delete
DI SPECTROPHOTOMETER, MODEL ABC12		FISHER SCIENTIFIC	2	Each	550.00	1100.00	🖓 Add 📋
MAINTENANCE AND		FISHER SCIENTIFIC	2	Each	600.00	1200.00	🖓 Add 📋
Select All / Deselect All	Select lines to:	Add to Favorites	😡 Add to Template(s)	Î Delete Sele	cted		
					Total Amount	2,300.00 USD	
Shipping Summary							
🖉 Edit for All Lines							
Requisition Comments and Attachments							
Enter requisition comments							[7]
Send to Supplier	ow at Receipt	Shown at Voucher			Add more	Comments and Attack	ments
Comments to Approver							
Enter Comments Here							

Comments and Attachments

In addition to being able to add Ship-To comments for suppliers and Receiving, there are three other areas where you can add comments to a requisition.

1. Use the <u>Comments</u> Cloud icon on the right side of the requisition lines. The presence of lines within the icon means a comment or attachment has been entered. Each requisition line can have its own comment if you want to elaborate on the requisition line's description.

Line Comment						
Business Unit LBNL	Business Unit LBNL Requisition Date 03/14/2017					
	Status Oper	n				
Line 1						
Comments		Find First	🕖 1 of 1 🛞 Last			
Use Standard Comments	Entered On	1:	+ -	a		
1 See attached specification LBNL-1234 fo	at Receipt Show at V	/oucher		¢.		
Add Attachments						
Attached File	User/Date Time	View	Send to Supplier			
1		View				
OK Cancel						

After clicking \bigcirc cloud icon and entering the *Line Comment* screen (shown above), you can:

- Type in a comment for that line in the Comments box provided.
- Click the "Add Attachments" button to search for and upload any file to the requisition. All requisition attachments should be attached to Requisition Line 1 for easy access by approvers. You may attach several files. Each file name must be under 60 characters in length.
- If you want the comments to also be visible to the Supplier, Receiving, or Accounts Payable (Voucher), select the appropriate checkboxes.
- 2. The <u>Requisition Comments and Attachments</u> box in the lower part of the *Checkout* screen allows you to enter comments that apply to the requisition as a whole. Approvers cannot readily see these comments.

Note: Include freight information in the Requisition Comments. Do NOT add a separate line in the requisition for freight.

3. <u>Comments to Approver</u> is visible on the approver's screen and lets you communicate comments and justifications to the approver for items you will be purchasing.

Approvals & Save

Preview Approvals

Before you can add additional approvers or reviewers, you need to save your requisition. Click "Save for Later" button. In the *Checkout- Review and Submit* screen, click the "Preview Approvals" link to display the *Preview Approvals* screen. This screen shows the approvers who will be asked to approve the requisition.

Checkout - Review and Submit							
Review the item information and submit the req for app	roval.	*	My Preferences	Requisition Set	tinos		
Requisition Summary			wy Freierendes	Requisition bei	mußa		
	keley National Lab Ichez,Ignacio *Deliver To Location 076-0240			Medium 🗸	Hands On Work 🗸		
	Invoice Certifier	Q	Sole Source Flag	No 🗸			
	Resource Analyst						
	*SAS Approver Jones, Andrew D	Q ADJONES					
Cart Summary: Total Amount 2,300.00 USD							
Expand lines to review shipping and accounting details	s Copy Line 1 Project(s) and	Activity(s) to All Lines	🕆 Add More	Items			
Requisition Lines 👔							
Line Description Item ID	Supplier	Quantity	UOM	Price	Total	Comments D	elete
MODEL ABC12	FISHER SCIENTIFIC	2	Each	550.00	1100.00	Edit	Û
2 ea MAINTENANCE AND REPAIR	FISHER SCIENTIFIC	2	Each	600.00	1200.00	🖓 Add	Û
Select All / Deselect All Select lin	nes to: 🕞 Add to Favorites	Add to Template(s)	Î Delete Select	ed			
				Total Amount	2,300.00 USD		
Shipping Summary							
Edit for All Lines							
Requisition Comments and Attachments							
Enter requisition comments						2	
						:	
Send to Supplier Show at Rece	ipt Shown at Voucher			Add more	Comments and Attac	hments	
Comments to Approver							
Enter Comments Here							
Check Budget	t						
🕞 Save & submit 📳 Save for Late	r Add More Items	60 Preview Approvals					

Preview Approval	S			×
Requested For	Sanchez,Ignacio		Number of Lines 2	
Requisition Name	1000103344		Total Amount 2,300.00 USD	
Business Unit	LBNL			
Status	Open			
Priority	Medium			
Budget Status	Not Checked			
SAS Dollar A	nount Approval			
🕆 Req	uisition 1000103344:Initiated	Start New Path		
	nount Approval			
€_	LOUTED Jones, Andrew D LBNL Requisition Approver(SAS)			
Return	Apply Approval Changes			

Inserting Additional Approvers or Reviewers

Adding an Approver or Reviewer to an Existing Path

Click on the green plus 💽 icon to the left of the individual in the path.

Preview Approval	s			×
Requested For	Sanchez,Ignacio		Number of Lines 2	
Requisition Name	1000103344		Total Amount 2,300.00 USD	
Business Unit	LBNL			
Status	Open			
Priority	Medium			
Budget Status	Not Checked			
SAS Dollar A	nount Approval			
	uisition 1000103344:Initiated	+Start New Path		
	nount Approval			
	louted			
	Jones, Andrew D LBNL Requisition Approver(SAS)			
Return	Apply Approval Changes			

Next, select the User ID for either an approver or a reviewer using the search tool. Once the individual has been selected, use the "Insert as" buttons to indicate whether the individual will be an approver or reviewer. When finished, click "Insert."

In this example, Daniel Chivers is being selected as an approver before Andrew Jones.

🥘 Mozi	illa Firefox	_		×
(i) 🔒	https://fsmb2b164.	qa. <mark>lbl.go</mark> v	/: 8001	80%
	ditional approver or rev in approver or reviewer t			
User ID:	DHCHIVERS	Chivers	,Daniel H.	
Insert as:	Approver			_
Insert	Cancel			

After selecting the desired reviewer or approver, click the "Apply Approval Changes" button.

Next, click the "Return" button.	
----------------------------------	--

Preview Approval	Is
Requested For	Sanchez,Ignacio Number of Lines 2
Requisition Name	1000103344 Total Amount 2,300.00 USD
Business Unit	LBNL
Status	Open
Priority	Medium
Budget Status	Not Checked
SAS Dollar Ar	mount Approval
Added Req	uisition 1000103344:Initiated Start New Path
	mount Approval
Not F	Routed Image: Not Routed Chivers, Daniel H. Jones, Andrew D
	Inserted Approver
Return	Apply Approval Changes

Edite qualition - Review and Submit Review in thomas use uses the region region Review in thomas uses the region region region Review in thomas uses the review in thomas uset the review in thomas uses the review in the review in thomas uses the review in the review in thomas uses the review in thomas uses the review in the review in the review in thomas uset the review in thomas uses the review i								
Autor but micro autor aut	Edit Requisition - Review a	nd Submit						
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Butines Unit Line Lances Bersey (Address) Each Status (Barrier Bersey) (Ba	Regulation Summary			<i>r</i>	My Preferences \$	Requisition Setting	16	
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"Currency USO "Deferrer To Location (p1-0220 "proverty Leasen _ Type of Berrores _ Site Services _ Tards Co. Non , Type of Berrores _ Site Services _ Tards Co. Non , Type of Berrores Site Services _ Tards Co. Non , Type of Berrores Site Services _ Tards Co. Non , Type of Berrores Site Services _ Tards Co. Non , Type of Berrores Site Services _ Tards Co. Non , Type of Berrores Site Services _ Tards Co. Non , Type of Berrores Site Services _ Tards Co. Non , Type of Berrores Site Services _ Tards Co. Non , Type of Berrores Site Services _ Tards Co. Non , Type of Berrores Site Services Type of Berrores ADONES Contents to reverse inspire and accounting details			ab					
Invoice Certifier Ippe of services Resource Analystic ALUANES Cert Summary: Total Amount 2.000 00 USD Exped leves broking and accounting details Cogy Like 1 Projection and Additional Services Certifier Like Description Test In D Supplier Counters Description Certifier Certifier Certifier Certifier Certifier Certifier Certifier Certifier Certifier Certifier Certifier Certifier Certifier Certi			To Location 076-0240	L				
-*LAS Approves jones Andrew D ADJONES Carl summary: Total Amount 2300.00 USD Equad tess to refere artigoing and accounting details Carguine is Project (a) and Addition term Requisition Lines Tess Comments Comments Comments Comments Com		Invo	ice Certifier	Q	Type of Services	On Site Services Har	nds On Work 🗸 🗸	
Cert Summary: Total Anount 2.306 00 USD Expand lines to review shipping and accounting dealls Cogri Line 1 Project(s) and Addit(s) to All Lines Center Summary: Total Anount 2.306 00 USD Comments of Addition Lines Center Summary Ce					Sole Source Flag	N0 V		
Expand lines to review shipping and accounting details Cogy Line 1: Project(6) and Actuality(6) to Al Lines Add More Items			s Approver Jones, Andrew D	Q ADJOINES				
Capacity of units of open and open					Add More I	tems		
Like Description tem ID Supplier Quartity UOM Price Total Comments Delete Image:		ting details	Copy Line 1 Project(s) an	d Activity(s) to All Lines	· Acciment	anne -		
Image: Process Budget Process Budget Image: Process Budget Process Budget		Item ID	Supplier	Quantity	UOM	Price	Total	Comments Delete
MANTENNACE AND PISHER SCIENTIFIC 2 Exin Select AII / Deselect AII AII		R,	FISHER SCIENTIFIC	2	Each	550.00	1100.00	🕞 Edit 🗍
	MODEL ABC12							
Conserved Detected at the Detected	▶ 2 ada MAINTENANCE AND		FISHER SCIENTIFIC	2	Each	600.00	1200.00	S Add 🛙
Shipping Summary Eclifor All Lines Requisition comments and Attachments Enter requisition comments iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selected			
Edit for All Lines Regulation Comments and Attachments Enter regulation comments Send to Supplier Show at Receipt Shown at Voucher Add more Comments and Attachments Comments to Approver Enter Comments Here Comments Here Pre-Check Budget Pre-Check Budget Pre-Ch						Total Amount	2,300.00 USD	
Requisition Comments and Attachments Enter requisition comments Image: Comments and Attachments Image: Comments Here Enter Comments Here Image: Check Budget Image: Check Budget	Shipping Summary							
Enter regulation comments Enter regulation comments Send to Supplier Show at Receipt Shown at Voucher Add more Comments and Attachments Comments to Approver Enter Comments Here Enter Comments Here Pre-Check Budget Pre-Check Budget	🖉 Edit for All Lines							
Image: Send to Supplier Show at Receipt Show at Receipt Show at Voucher Add more Comments and Attachments Comments to Approver Enter Comments Here Image: Check Budget Image: Check Budget	Requisition Comments and Attachment	5						
Comments to Approver Enter Comments Here	Enter regulation comments							2 7
Comments to Approver Enter Comments Here								
Comments to Approver Enter Comments Here								
Enter Comments Here		Show at Receipt	Shown at Voucher			Add r	nore Comments and Atta	chments
Check Budget Pre-Check Budget								
	Enter Comments Here							2
								.::
	🕅 Check Budget	Pre-Check Budget						
	🛃 Save & submit	Save for Later	Add More Items	6ð Prevlew Approvals				

In the *Review and Submit* screen, click the "Save & submit" button.

New Path

If you want to insert an additional approver or reviewer as a new path, select "Start New Path" and select the appropriate User IDs for either an approver or a reviewer.

Note: The approval/review will be a parallel process.

Confirmation			
Your requisition has been submitte	ed.		
Requested For	Sanchez,Ignaclo		Number of Lines 2
Requisition Name	1000103344		Total Amount 2,300.00 USD
Requisition ID	1000103344		
Business Unit	LBNL		
Status	Pending		
Priority	Medium		
Budget Status	Not Checked		
Hew printable version	🐔 Edit This Requisition	Check Budget	Pre-Check Budget
SAS Dollar Amount	Approval		
Requisition	n 1000103344:Pending	Start New Path	
8A 8 Dollar Amount Appro	oval		
Jones Andrew D			
Apply Approval Change	5		
Create New Requisition	Manage Requisitions		

Next, select the User ID for either an approver or a reviewer using the search tool. Once the individual has been selected, use the "Insert as" buttons to indicate whether the individual will be an approver or reviewer. When finished, click the "Insert" button.

e M	lozilla Firefox	_		×
() (https://fsm	b2b164.c	a.lbl.g	67%
Start ne	w approval path			
Choose	an approver or revi	ewer to insert	i i	
User ID:	EKELLOGG	🔍 Kellogg,Eliza	beth	
Insert as:	Approver			
	Reviewer			
Insert	Cancel			

In the example below, Marc Fischer was added as a reviewer and Elizabeth Kellogg was added as an approver.

Andrew Jones will approve the requisition in parallel with Marc Fischer's/Elizabeth Kellogg's review and approval.

To change the order of Approval/Review, select the appropriate green plus 🗈 icon that is either before or after the prescribed individual.

Confirmation Your requisition has been submitted. Requested For Sanchez, Ignacio Number of Lines 2 Requisition Name 1000103344 Total Amount 2,300.00 USD Requisition ID 1000103344 Business Unit LBNL Status Pending Priority Medium Budget Status Not Checked Check Budget View printable version Pre-Check Budget 🖉 Edit This Requisition SAS Dollar Amount Approval Requisition 1000103344:Pending Start New Path SAS Dollar Amount Approval Pending Jones, Andrew D ÷ LBNL Requisition Approver(SAS) Added Θ B_GHIORSO, 2 --Reviewer Not Routed Kellogg,Elizabeth Inserted Approver **+**_) Fischer, Marc L **+** ÷ Reviewer 6ð 8 Apply Approval Changes Create New Requisition ħ Manage Requisitions

When complete, click the "Apply Approval Changes" button.

Edit Requisition - Review								
Review the item information and s	submit the req for approval.		*	My Preferences	Requisition Se			
Requisition Summary				My Preferences	Requisition Se	ettings		
Business Unit LBNL	Lawrence Berkeley Nati	ional Lab		Requisition Name	1000103344			
Requester ISANCHE				Requisition I	D 1000103344			
*Currency USD		To Location 076-0240		Priority				
	Invo	oice Certifier	Q	Type of Service	on Site Service	s Hands On Work 🗸		
	Reso	urce Analyst	Q	Sole Source Fla	ag No 🗸			
	*\$4	S Approver Jones, Andrew D						
Cart Summary: Total Amount 2,3				Add Mor				
Expand lines to review shipping a	and accounting details	Copy Line 1 Project(s) and	d Activity(s) to All Lines	Add Mor	e Items			
Requisition Lines 👔								
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Comments E)elete
MODEL ABC12	METER,	FISHER SCIENTIFIC	2	Each	550.00	1100.00	🖗 Edit	Û
	D	FISHER SCIENTIFIC	2	Each	600.00	1200.00		Û
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selec	ded			
					Total Amount	2,300.00 USD		
Shipping Summary								
🛃 Edit for All Lines								
Requisition Comments and Attac	hments							
Enter requisition comments								
							.::	
Send to Supplier	Show at Receipt	Shown at Voucher			Add more	e Comments and Atta	chments	
Comments to Approver								
Enter Comments Here								
							[7]	
🕎 Check Budget	Pre-Check Budget							
🕞 Save & submit	🙁 Save for Later	Add More Items	60 Preview Approvals					

In the *Review and Submit* screen, click the "Save & submit" button.

Add More Items

Before submitting your requisition, you have another chance to add more items. To do this, click the "Add More Items" button at the bottom of the *Checkout* screen. You will return to the *ePro Requisition* screen, where you should click the "Create Requisition" link and add a new line. After adding the new line to your cart, go to the *Checkout* screen and enter the line Accounting and other information.

Save for Later

If you are not ready to save and submit your requisition, you can select "Save for Later" to save the requisition and work on it later. Nothing you have entered on the requisition will be saved until you click either the "Save for Later" or the "Save & submit" button. "Save for Later" saves your work without submitting it for approval and gives you a requisition number so you can return to the

requisition at a later time. You can still work on the requisition after you click the "Save for Later" button.

Save and Submit

If you are ready to save and submit your requisition for approval, click the "Save & submit" button.

Once you click the "Save & submit" button, the *Confirmation* screen will appear.

Confirmation				
Your requisition has been sub	mitted.			
Requested For	Sanchez,Ignacio			Number of Lines 2
Requisition Name	1000103344			Total Amount 2,300.00 USD
Requisition ID	1000103344			
Business Unit	LBNL			
	Pending			
Priority	Medium			
Budget Status	Valid			1
View printable version	🖉 Edit This Requisitio	on 📉 Che	eck Budget	Pre-Check Budget
SAS Dollar Amount	Approval 1000103344:Pending	€Start New Path		
SAS Dollar Amount App	proval		1	
Dending Jones,Andrew LBNL Requisition	D In Approver(SAS)			
B_GHIORSO, 2				
Reviewer Fischer,Marc L 6ð	Pending Kellogg,Eliza			
Apply Approval Chang	es			
Create New Requisition	🗎 Manage Requisitio	ns		

- Use the unique "Requisition ID" number for queries and reports.
- You can click the "View printable version" link to see a printable requisition document with all lines and comments.
- If the requisition approver denies the requisition, the requester will receive an email.
- Click the "Edit This Requisition" link to make immediate changes to the requisition.

Budget Check

• You need to perform a budget check. To do so, click the "Check Budget" link. Click the "OK" button if a message pops up.

• Notice that the "Budget Status" says "Valid." This means that the requisition is available for further processing.

Note: If the Budget Status says "Error", there may be a funding issue with your order. You will need to contact your resource analyst.

• A "Pending" status above the approver's name means that the approver was sent an email to approve the requisition. "Not Routed" means that the approver was not yet asked to approve the requisition. After a requisition is approved, it is sent to the next approver, and the next approver's status changes to "Pending." When an approver approves a requisition, their box changes from blue to green. When they deny a requisition, the box turns red and the requisition is not routed to the next approver.

Insert or Remove Approver/Reviewer

On the *Confirmation* (or *Requisition Approval*) screen, you may insert additional requisition approvers and reviewers, who may be anyone at the Lab with an email address. An inserted reviewer is sent an email with a link that lets the reviewer look at the requisition, but the requisition does not require approval or any other action from the reviewer. An inserted approver must approve the requisition before it can proceed.

To insert an approver or reviewer:

• Click the green plus 🔄 icon before or after the approver already shown—depending on if you want the inserted approver/reviewer to see the requisition before or after the original approver.

Confirmation			
Your requisition has been sub	mitted.		
Requested For	Sanchez,Ignacio		Number of Lines 2
Requisition Name	1000103344		Total Amount 2,300.00 USD
Requisition ID	1000103344		
Business Unit	LBNL		
Status	Pending		
Priority	Medium		
Budget Status	Valid		
View printable version	🖉 Edit This Requisition	Check Budget	Pre-Check Budget
•	1000103344:Pending 🖭	Start New Path	
SAS Dollar Amount App Pending	proval		
Jones, Andrew	D Approver(SAS)		
B_GHIORSO, 2			
Reviewer Fischer,Marc L 6ð Reviewer	Kellogg,Elizabeth Inserted Approver	Ŧ	
Apply Approval Chang	es		
Create New Requisition	Manage Requisitions		

• This brings up the *Insert additional approver or reviewer* screen, where you can directly enter the inserted person's LDAP User ID.



• If you want to look up a User ID, click the search \bigcirc icon, enter the person's last name in the Name box, click the "Search" button, and then click on the name of the person you want to insert. This transfers the User ID to the previous screen.

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🛈 🔒 https://fsr	mb2b164.qa. lbl.gov :8001	80%
Approver/Reviewer	Search	^
Name: begins with User ID: begins with	SACY	
Search Clear	Cancel	
Search Results		
	🕔 1 - 100 of 679 💽	
User ID SAALVAREZ SAANSARI SAAPODACA SABERLINGER SABEALINGER SABRADY SACARAS SACURRIVAN SACYARAT SADELARVEDUCAN SAEVANS SAFANDI	Name Alvarez-Rivera, Steven A. Ansari, Serai Ahmad Apodaca, Suzanne Annette Berlinger, Sarah Amalia Blair, Steven A Brady, Susan A Campen, Saori Amaike Valentine, Shelley A Curriven, Sineed Ann Cybart, Shane A de Is Rue do Carr, Stephane Evans, Samuel A Weiss Afandi, Sadia	
SAFINSTERLE SAGOURLAY	Finsterle,Stefan A Gourlav.Stephen A	
<		>

• Finally, on the original *Insert additional approver or reviewer* screen, click either the "Approver" or the "Reviewer" button, then click the "Insert" button.

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(i) 🔒	https://fsmb2b	164.qa. lbl.gov :	8001/p	osc/fm:	80%
	ditional approver o				
User ID:	SACYBART	Wer to insert	hane A		
Insert as:	Approver				
	O Reviewer				
Insert	Cancel				

To remove an approver or reviewer:

• Click the red minus 🖃 icon in the box associated with that person's name.

Confirmation						
Your requisition has been sub	mitted.					
Requested For	Sanchez,Ignacio			Nu	mber of Lines	2
Requisition Name	1000103344				Total Amount	2,300.00 USD
Requisition ID	1000103344					
Business Unit	LBNL					
Status	Pending					
Priority	Medium					
Budget Status	Valid					
Wiew printable version	🖉 Edit Thi	s Requisition	r c	heck Budget	Pre-Chec	k Budget
SAS Dollar Amount	••	Deadlac		•Start New Path		
SAS Dollar Amount App	1000103344:	renaing		Start New Path		
Pending Jones,Andrew		÷				
B_GHIOR\$0, 2						
Reviewer Fischer,Marc L 6ð) Ilogg,Elizabeth erted Approver		Cybart,Shane A Inserted Approver		
Apply Approval Chang	jes					
Create New Requisition	Manage	Requisitions				

Consultant Services

Requisitions for consultant services require additional documentation. See *Exhibit A – Consultant Services* for further information on acquiring these services.

Approving ePro Requisitions

What Does It Mean to Approve a Requisition?

When an approver approves a requisition, it means:

- The purchase is allowable (is a reasonable cost that a prudent individual would consider necessary and compliant with Contract 31), reasonable, and justified.
- The appropriate project is being charged.
- There are adequate funds to cover the purchase.
- Item Categories and other information on the requisition appear to be accurate.
- The department staff has any required safety training for the item being purchased.

Approval Emails

	M Gmail	٩	label:3-I\$m-help-desk × •		0		RHELEY LA	•
+	Compose	÷		50 of 14,146	¢	,	٠	
	Drafts 23		Approval is Requested for Requisition ID "1000204686" > 3 FSM Held Deak a			ē	ø	
	Categories	0	smdaglia⊛lbl.gov	Mon, Aug 13, 2:31 PM (7 days ago)	÷	*	3	
	1- HOT Issue with 41	6	to do-not-repsy-FMS, me. =				1	
1	2-ServiceNow 14,318	1	Based on the consistion and fine encourse internet at the following consistion. Very one an east to the encourse area to obtain the balance internet and the balance intern					
	3- F\$M Help De 2,319		https://fms9uat.ga.lbl.gov/loso/fms9uat/EMPLOYEE/ERPix/PV_MAIN_MENU_PV_REQ_APPROVAL_GBL?Action=U&BUSINESS_UNIT=LBNL&REQ_ID=1000204585					+
	Mod Table Updates 4: Review Training/Res. Alfresca Alfracess Services		Requestor Lukens J. Wayne W Pregnanc Lukens J. Wayne W Requisition 1: 100205466 Requestion Name Disson Approval Date: 2014-06-13 Requestion Amount: £23.30 Addisonal Information:					
	Sleven Kala		PROJECT ACTIVITY					
	John Socz, on the phone, just get c Lorenza Gibson You: yestensay, right		100117 001 Use the below link to check Funding, Cost and Encumbrance (by BR Code).					
0	Tracy Kaae You for po 723340 María, Lorenza		https://copietb.bl/poz					
1000	Lorenza ok les you than Laura Sandors Thank world		You can approve this requisition using your enail and a Web browser as follows: - Click to the link above: - Log and berking the DHS using your LDAP User ID and password:					
	Ameka All Yes, I am just finialing up aboth		Click either the "Approve" or "Deny" button at the bottom of the screen.					
	Jello Castro Voz Cotomicod		An email message similar to this one will be sent to you each time a requisition is created that requires your approval. For assistance regarding requisition approvals, contact the Procurement Help Desk at Ext. 6400 or from the following link.					N
	Kmberly Jurgecoan You natesty 11 30 to 2:38 Victoria Oberholser Bu		http://ecoursenseti.bl.gov/webcome-bc-enoursenset.oroseshi/bebc.desb/					111
0	Noda Busler McMinister Carr is new approved		👞 Raply 😆 Forward					9

After a requisition preparer clicks the "Save & submit" button on the requisition, ePro "workflow" routes the requisition to an approver. The process starts with an email to the approver. The email includes a link that goes directly to the *FMS login* screen, then to the *ePro Requisition Approval* screen for that requisition.

ePro Requisition Approval Screen

equisi	ition Approval					
	Business Un	and the second				
		D 1000204681				
	Requisition Nam	e 1000204681 r Kalus,Steven				
		n 08/06/2018				
		Pending		Total Am	ount	2.000.00 USD
		Y Medium		Total All	ount	2,000.00 0.00
		Not Checked				
	ter's Justification					
Noj	justification entered	by requester.				
	Edit Requisition					View printable version
	Edit Requisition					
Line	e nformation					
	and a second			,	Personation Find 1	First (8) 1 of 1 (8) Last
ine In	nformation			The second second second		Requester's Comments
.ine in	Line	Item Description	Supplier Name	Guardity USM	Price	madmanda
			Supplier Name ANIXTER	1.0000 EA.	Pres 1500 00000 US0	
2	Line			Contraction (1996)		
2	Line	TEST		Contraction (1996)		
]] Sele	Line 1 % ⁰ ect All / Deselect All View Line Deta	TEST		Contraction (1996)		
]] Sele	Line 1 🌮 ect All / Deselect All	TEST		Contraction (1996)		
]] Sele - Rev	Line 1 % ⁰ ect All / Deselect All View Line Deta	TEST		Contraction (1996)		

- The approver clicks the "Approve" button to approve the requisition or the "Deny" button to deny it. When the "Deny" button is pressed, the approver must enter the reason for the denial in the "Enter Approver Comments" box. An email is then automatically sent to the requester to alert of the denial. If the denial is due to an incorrect SAS approver, edit the requisition and update the SAS approver to the correct approver, then click "Preview Approvals" before clicking "Save & submit" button.
- To see attachments, the approver clicks the "Requester's Comments" icon on the right side of requisition line 1.
- The "View Printable Version" link displays the *Print Requisition* screen, which displays projects, comments, and other information. The Project/Activity is also displayed on the email.
- Clicking the Expand/Collapse arrow icon on the left side of the "Review/Edit Approvers" bar will display all requisition approvers and the approval status of the requisition.
- Approvers can insert additional approvers or reviewers by clicking on the Edit Requisition button and then follow the instructions starting on page 37.
- If there is more than one requisition to be approved, use the links at the bottom of the *Requisition Approval* screen: "Return to Approve Requisitions," "Previous in List," and "Next in List."

Ways to Approve Multiple Requisitions at a Time

Two other methods let approvers see all requisitions routed to them for approval so they can more quickly approve several requisitions at a time. The methods are in the Manage Requisitions or the Work list screens as follows:

1. Navigating to the **eProcurement | Manage Requisition Approvals** screen allows the approver see all requisitions requiring their approval.

Favori	ites =	Main Men	u eProcu	irement 🐀 Manage Rec	quisition App	provals	aleres a			
	ון BE	RKELEY	/ LAB - FI	NS 📕						
Mar	nage F	Requisitio	on Approva	als						
	Search R	Requisition	S							
To lo	ocate requ	uisitions that	require your app	proval (or requisitions that	previously r	equired your a	approval), edit the	e criteria below and	d click the Sea	irch button.
	1	Requisition	ID			Requisi	tion Name			a
	1	Business Ur	nit	Q			*Status Pend	ling	~	
		Date Fro	m	in the second se			Date To 08/10	/2018	31	
		Request	er	٩		E	Entered by		Q	
	Search	Cle	ar					Show Advanced S	earch	
To ap		deny one or		equisitions, select the appr le Requisition ID link.	opriate actio	on from the dr	opdown and click	submit. To view		
	Action/	Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Tot	al
▶ @	Pending	~	20703	J20703	LBNL	02/05/2015	Madur, Arnaud	Madur, Arnaud	4308.00	USD
▶ @	Pending	~	20931	J20931	LBNL	05/11/2015	Gholba,Samanth Nicole	aGholba,Samanth Nicole	na 56300.12	USD
• @	Pending	~	20932	J20932	LBNL	05/11/2015	Gholba,Samanth Nicole	aGholba,Samanth Nicole	na 6345 <mark>9.00</mark>	USD
» (Pending	~	000204680	Test Project Approver	LBNL	08/06/2018	Baran,Miranda	Baran,Miranda	2050.00	USD
▶ 6	Pending	~	000204681	1000204681	LBNL	08/06/2018	Kalus,Steven	Kalus,Steven	2000.00	USD
Ma	ark All:	~	Approve	Ø Deny						
	Submi	ť j								

Here, the drop-down menu can be changed from "Pending" to "Approve" or "Deny." After the "Submit" button is clicked, the action will take place. Line details can be viewed by clicking the

arrow (Expand/Collapse icon) to the left of the line. Clicking on the Req ID link brings up the full *Requisition Approval* screen.

The approver can mass-approve or deny all requisitions using the "Mark All" links at the bottom.

2. Navigating to the **Main Menu |Worklist** screen also allows the approver see all requisitions requiring their approval. When the requisition link is clicked, the approver is taken to the *Requisition Approval* screen.

	Main Menu Work					Home W	Vorklist Add to Favorites	Sign o
BER	KELEY LAB - F	MS						
	and the second of					1	New Window Help Personalize	Page 🔚
Vorklist								
Norklist for SI	VIDAGLIA: Daglia,S	tenhanie M						
VUINISCIUL SI	VIDAOLIA. Daylia,5							
Detail View			Worklist Filters Appr	oval Routing	V Feed -			
			Worklist Filters Appr	oval Routing				
Detail View Worklist Items			2			ize Find View All 🔎 🔜	First 🚯 1-2 of 2 🛞 Last	
	Date From	Work Item	Worklist Filters Appr Worked By Activity	oval Routing Priority	Link	ize Find View All 🗇 🔜	First 🚯 1-2 of 2 🕑 Last	
Worklist Items From			Worked By Activity	Priority	Link			
Worklist Items	Date From 08/06/2018	Work Item Approval Routing	2		Link	ze Find View All 🖾 📑	First 🕚 1-2 of 2 🕑 Last Reassign	
Worklist Items rom			Worked By Activity	Priority	Requisition, 1846503, LBNL ePro Read Approval, 2014-01-02, N. 0. BUSINESS UNTI-LBNL REG. 1D:1000204681, Requisition, 1846511, LBNL ePro			
Worklist Items From			Worked By Activity	Priority	Link Requisition_1846503_LBNL_ePro Reg Approval_2014-01-02_N_0 BUSINESS UNIT_LBNL REG_ID_1000204681.			

Check Requisition/Order Status

Manage Requisitions Screen

To access previously created requisitions and check their status, log into FMS and navigate to:

Main Menu - 🕠 ePr Search Menu: 6 Employee Self-Service Manager Self-Service Supplier Contracts Budget / Pl Suppliers eProcure LBNL Contract Mod Re LBNL PO Modification Accounts Pavable. LBNL PO Modification R LBNL Procurement Status Reporting Too

Main Menu | eProcurement | Manage Requisitions

On the *Manage Requisitions* screen, search for the requisition you want to see by typing in the relevant information in the Search Requisition area of the screen. Enter parameters like requester User ID, requisition preparer User ID, or requisition ID to match what you are trying to find. You may also enter a specific "Requisition ID" or "Requisition Name" in their respective fields and search for a particular requisition that way. For this to work, the "Date From" and "Date To" range must be broad enough to cover the period when the requisition was created. The "Requester" field must be blank when entering a Requisition ID or Requisition Name.

You can optionally change the "Request State" from "All but Complete" to "Pending" to only see requisitions waiting for division approval(s).

When the specific parameters have been entered for the search, click the "Search" button.

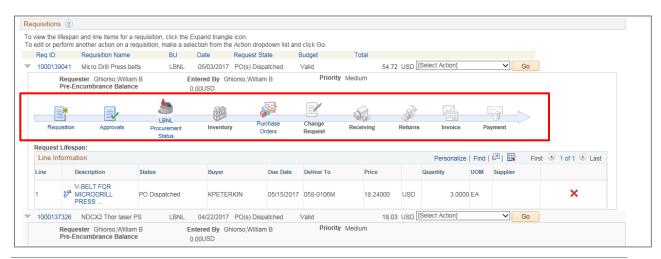
Note: The list of requisitions will contain up to 100 requisition lines; not requisitions (i.e., one requisition with 100 lines would show only one requisition). If more lines need to be viewed, it is recommended that you narrow the search parameters.

Manag	e Requ	isitions									
▼ Sear	ch Requisi	itions									
To locat	e requisition	ns, edit the criteria below and cl	ick the Sea	arch button.							
	Business	Unit LBNL		Requisitio	n Name						Q
	Requisitio	on ID		Reque	st State All but Comp	olete 🗸	Bud	get Status			~
	Date F	rom			Date To 07/13/2017	31		Buyer			Q
	Reque	ester SMDAGLIA		Ent	ered By	Q		PO ID			Q,
	Supplie	er ID 🔍									
Se	earch	Clear	s	Show Advance	d Search						
Requisit	tions 🕐										
		and line items for a requisition, nother action on a requisition, r				and click Go.					
Req	ID	Requisition Name	BU	Date	Request State	Budget	Total				
▶ 100	0140763	Genewiz Shipping Test	LBNL	07/11/2017	PO(s) Dispatched	Valid	3.75 USD	[Select Action]	~	Go	
▶ 100	0140731	Nor Cal End to End	LBNL	06/28/2017	PO(s) Dispatched	Valid	2.75 USD	[Select Action]	~	Go	
▶ 100	0140714	Nor Cal GSS Test 1	LBNL	06/22/2017	PO(s) Dispatched	Valid	268.50 USD	[Select Action]	~	Go	
► 100	0140713	Nor-Cal by GSS Test	LBNL	06/21/2017	PO(s) Created	Valid	97.50 USD	[Select Action]	~	Go	
▶ 100	0140712	Nor-Cal Test 1	LBNL	06/21/2017	PO(s) Created	Valid	182.25 USD	[Select Action]	~	Go	

- You can click on the "Req ID" link to go to the *Requisition Details* screen, which lets you view details about the requisition, including its comments and attachments.
- Use the "Select Action" drop-down selection and "Go" button to see the *View Print* screen. It also has links to budget and approval status.
- To look at the entire lifespan of a requisition (from Requisition, to Order, to Payment), click on the arrow (Expand/Collapse icon) to the left of the Req ID.

Requisition Lifespan

When you expand the requisition line, the Requisition Lifespan ribbon appears. It is a row of icons that you can click to view details of each transaction that occurs over the requisition's life. Process icons that are in color can be clicked for further details. Processes represented by black and white icons have not taken place and are not clickable.



- <u>Requisition:</u> Requisition detail
- <u>Approvals</u>: Requisition Approval status
- <u>LBNL Procurement Status:</u> Purchase Order Procurement status
- <u>Inventory</u>: Inventory List (not used)
- <u>Purchase Orders:</u> Purchase Order details
- <u>Change Request:</u> PO Modification Request (not used)
- <u>Receiving:</u> Receiving status
- <u>Returns:</u> Returns status
- <u>Invoice</u>: Invoice records
- <u>Payment:</u> Payment history

Is My Requisition Approved and Who Are the Approvers?

Requisition preparers should monitor their "Open," "Pending," and "Denied" Request State requisitions to make sure they are progressing. It is also critical that all requisitions have a Budget status of "Valid." If not, click on the "Select Action" drop-down, choose "Budget Check" and click the "Go" button. If the Budget Status is not *Valid*, the requisition will NOT go to Procurement for processing even if it is approved.

To see if a requisition has all required approvals, look at the "Request State" column.

- If the State is "Open," the requisition preparer must edit the requisition and click the "Save & submit" button before it is sent out for approval(s).
- If the State is "Pending," it still needs to be approved. If the requisition is in a "Pending" state for a long time, it may have an approver who is not aware of it and has therefore not taken action.
- If the State is "Denied," review the Comments that the approver is required to complete and adjust the requisition as required, then re-submit.
- If the State is "Approved," all approvals have been completed and the requisition is ready to be put onto a PO.

									New Wi	ndow Help I	Perso
anage	Requi	isitions									
Search	h Requisit	tions									
To locate	requisition	ns, edit the criteria below and	click the S	Search button.							
1	Business	Unit LBNL 🔍		Requisiti	on Name						0
	Requisitio	on ID 🔍		Requ	est State All but Com	nplete 🗸	•	Budget Status			\checkmark
	Date F	From 10/20/2014			Date To 10/30/2014						
	Reque	ester		En	tered By RMWILLIAM	/IS 🔍		PO ID			Q.
equisitior	ons 🕐										
o view the	e lifespan perform ar	and line items for a requisitior nother action on a requisition, Requisition Name					Total				
o view the o edit or p Req ID	e lifespan perform ar		make a s	election from t	he Action dropdown li Request State	ist and click Go. Budget Valid		USD [Select Act	on]	Go]
o view the o edit or p Req ID 10000	e lifespan perform ar 0 004598	nother action on a requisition, Requisition Name	make a s BU	election from t	he Action dropdown li Request State Approved	Budget	121.00	USD [Select Act		✓ Go ✓ Go]
o view the o edit or p Req ID 10000	e lifespan perform ar 0 004598 004514	nother action on a requisition, Requisition Name 1000004598	make a s BU LBNL	election from t Date 10/29/2014	he Action dropdown li Request State Approved Approved	Budget Valid	121.00 820.00		on]]
o view the o edit or p Req ID 10000 10000 10000	e lifespan perform ar 004598 004514 004492	nother action on a requisition, Requisition Name 1000004598 Ajay Yadav	make a s BU LBNL LBNL	election from t Date 10/29/2014 10/29/2014	he Action dropdown li Request State Approved Approved	Budget Valid Valid	121.00 820.00 12,000.00	USD [Select Act	on] on]	✓ Go	
o view the o edit or p Req ID 10000 10000 10000	e lifespan perform ar 004598 004514 004492 004417	nother action on a requisition, Requisition Name 1000004598 Ajay Yadav Dr. Zhang - ExecutiCons	BU LBNL LBNL LBNL	election from t Date 10/29/2014 10/29/2014 10/29/2014	he Action dropdown li Request State Approved Approved Approved PO(s) Dispatched	Budget Valid Valid Valid	121.00 820.00 12,000.00 32.00	USD [Select Acti	on] on] on]	 ✓ Go ✓ Go 	
To view the To edit or p Req ID 10000 10000 10000 10000 10000 10000 10000	e lifespan perform ar 004598 004514 004492 004417 004372	nother action on a requisition, Requisition Name 1000004598 Ajay Yadav Dr. Zhang - ExecutiCons COD Fees for PO #7203259	BU LBNL LBNL LBNL LBNL LBNL	election from t Date 10/29/2014 10/29/2014 10/29/2014 10/28/2014	he Action dropdown li Request State Approved Approved Approved PO(s) Dispatched Approved	Budget Valid Valid Valid Valid	121.00 820.00 12,000.00 32.00 42.00	USD [Select Act USD [Select Act USD [Select Act	on] on] on]	 ✓ Go ✓ Go ✓ Go 	
To view the To edit or p Req ID 10000 10000 10000 10000 10000 10000 10000 10000 10000 10000	e lifespan perform ar 0 004598 004514 004492 004417 004417 004372	nother action on a requisition, Requisition Name 1000004598 Ajay Yadav Dr. Zhang - ExecutiCons COD Fees for PO #7203259 Hawkins Traffic Safely	BU LBNL LBNL LBNL LBNL LBNL	election from t Date 10/29/2014 10/29/2014 10/29/2014 10/28/2014 10/28/2014	he Action dropdown i Request State Approved Approved Approved PO(s) Dispatched Approved Pending	Budget Valid Valid Valid Valid Valid	121.00 820.00 12,000.00 32.00 42.00 3,690.00	USD [Select Act USD [Select Act USD [Select Act USD [Select Act	on] on] on] on]	Go Go	

There are two ways to see who is in line to approve a requisition:

1. Change the [Select Action] to "Approvals" and click the "Go" button.

lanage Req									
Search Requi	sitions								
To locate requisit	tions, edit the criteria below ar	nd click the S	Search button.						
Busine	ss Unit LBNL	6	Requisition Name						Q
Requis	ition ID		Request State	All but Complete	\checkmark	Budget Sta	tus		~
Dat	e From 10/20/2014	j	Date To	10/28/2014	31				
Req	uester	6	Entered By	RMWILLIAMS	0	PC	DID	0	Q
Search Requisitions (?)	Clear		Show Advanced Search	1					
o view the lifespa	an and line items for a requisit another action on a requisitio			dropdown list and clic	G0.				
Req ID	Requisition Name	BU	Date Request	State Budget		Total			
	COD Fees for PO #720325	9 LBNL	10/28/2014 PO(s) D	ispatched Valid		32.00 USD [Select	Action]	Go	
1000004417									4
1000004417 1000004372	Hawkins Traffic Safety	LBNL	10/28/2014 Approve	d Valid		42.00 USD [Select	Action]	Go	

2. Alternately, click the "Expand Section" arrow to the left of the "Req ID" to reveal the Request Lifespan section, and then click the "Approvals" icon.

To locate rea	equisiti	ons									
o locate leq	uisition	is, edit the criteria below an	d click the s	Search button.							
Bus	siness	Unit LBNL	6	Requisition	on Name						
Re	quisitio	n ID	6	Reque	est State All but Con	nplete 🗸	·	Budget Stat	us		
	Date F	rom 10/20/2014	j –		Date To 10/28/2014	Ħ					
	Reque	ster	6	En	tered By RMWILLIAI	IS 🔍		PO	ID		
Search		Clear		Show Advance	ed Search						
equisitions	?										
		and line items for a requisit other action on a requisitio				ist and click Go.					
Req ID	F	Requisition Name	BU	Date	Request State	Budget	Total				
1000004	417 (COD Fees for PO #720325	9 LBNL	10/28/2014	PO(s) Dispatched	Valid	32	.00 USD [Select	Action]	~	Go
1000004	372 H	Hawkins Traffic Safety	LBNL	10/28/2014	Approved	Valid	42	.00 USD [Select	Action]	~	Go
1000004	354 (CM Furnace - Benjamin D	LBNL	10/28/2014	Pending	Valid	3,69	0.00 USD [Select	Action]	~	Go
		er Delattre,Benjamin umbrance Balance		Entered By V 0.00 USD	Villiams,Rosemary	Prio	rity Medium				
							~				
Requis	sition		LBNL rocurement Status	Invento	ry Purchase Orders	Change Request	Receiving	Returns	Invoice P	ayment	\geq
	sition ifespar		rocurement	Invento			-	Returns			st
Requis	ifespar mation		rocurement	Invento		Request	Personalize		Invoice P		st
Requise Request L Line Infor	ifespar mation		rocurement Status		ry Orders Price	Request	Personalize	Find 🖓 🛄 OM Supplier	First 1-2		st

A sample *Approval Status* screen that shows the requisition as "Pending" approval is shown below.

Business Unit LBNL			
Requisition ID 1000004354			
Requisition Name CM Furnace - Ben	amin Delattre		
Requester Delattre,Benjamir			
Entered on 10/28/2014			
Status Pending		Total Amount	3,690.00 USD
Priority Medium			
Budget Status Valid			
No justification entered by requester.			View printable version
Line Information ③			View printable version
Line Information ③ Review/Edit Approvers	1		View printable version
No justification entered by requester. Line Information @ Review/Edit Approvers AS Dollar Amount Approva © CM Furnace - Benjamin I			View printable version

A sample *Approval Status* screen that shows the requisition as "Approved" is shown below.

Approval Status		
Business Unit LBNL		
Requisition ID 1000069238		
Requisition Name Add funds to PO#7273474		
Requester Yamamoto,Karen		
Entered on 02/18/2016		
Status Approved	Total Amount	18,000.00 USD
Priority Medium		
Budget Status Valid		
Requester's Justification		
No justification entered by requester.		View printable version
No justification entered by requester. Line Information ②		View printable version
		View printable version
Line Information		View printable version
Line Information Review/Edit Approvers SAS Dollar Amount Approval		View printable version
Line Information Review/Edit Approvers SAS Dollar Amount Approval Add funds to PO#7273474:Approved		View printable version
Line Information Review/Edit Approvers SAS Dollar Amount Approval Add funds to PO#7273474:Approved SAS Dollar Amount Approval		View printable version
Line Information Review/Edit Approvers SAS Dollar Amount Approval Add funds to PO#7273474:Approved SAS Dollar Amount Approval Approved		View printable version
Line Information Review/Edit Approvers SAS Dollar Amount Approval Add funds to PO#7273474:Approved SAS Dollar Amount Approval Approved Dedlow,Mark T LibNI: Requisition Approver(SAS)		View printable version
Line Information Review/Edit Approvers SAS Dollar Amount Approval Add funds to PO#7273474:Approved SAS Dollar Amount Approval Approved Dedow,Mark T		View printable version

If the Review/Edit Approvers section says, "No approvals required," but has an Approval History link, click on the link to see the actual approval information.

Approval Status			
Entered on Status Priority Budget Status	100018914 100018914 Gerstle,Jeanne M 02/23/2015 Approved Medium	Total Amount	53,098.24 USD
Requester's Justification No justification entered	by requester.		
			View printable version
Line Information (2)			
Review/Edit Approvers	5		
No approvals required Return to Manage Requisitions	·		

Below is a sample Approval Status screen that shows the requisition as "Denied" with the comments from the approver:

leview	Edit Approvers	
isior	n Approval	
-	Selenophene:Denied	View/Hide Comments
Requ	estor's Division Approval	
Ар	Williams,Warren LBNL Division Approver 03/03/15 - 5:16 PM	
	Comments	
S Do	Ilar Amount Approva Selenophene:Denied	I (■) View/Hide Comments
SAST	•	2
	ollar Amount Approval	
	ollar Amount Approval	
	nied	
Der	Gessner,Oliver	

Note: If the denial is due to an incorrect SAS approver, edit the requisition and update the SAS approver to the correct approver, then click "Preview Approvals" before clicking the "Save & submit" button.

Has My Requisition Been Assigned to a Buyer and Who is the Buyer?

A requisition that has one of the following Request States has been assigned to a buyer and has been put onto a PO.

- PO(s) Dispatched
- PO(s) Created
- Received

A requisition that has a Request State of "Approved" may or may not have been assigned to a buyer. To see whether or not the requisition has been assigned to a buyer and who the buyer is, click the Req ID link to go to the *Requisition Details* screen.

Note: The Budget Check must be in a "Valid" state before Procurement can see the request.

	nage Requ	uisitions								
•	Search Requis	itions								
То	locate requisiti	ons, edit the criteria below an	d click the S	Search button.						
	Busines	s Unit LBNL	6	Requisiti	on Name					9
	Requisit	tion ID	6	Reque	est State	~	Bu	idget Status		~
	Date	From 10/20/2013)		Date To 10/23/2014					
	Requ	Jester 🔍	6	En	tered By RMWILLIAM	is 🔍		PO ID		0
		n and line items for a requisiti								
Го		another action on a requisitior	n, make a s	election from t	he Action dropdown l		Total			
Γo	edit or perform a Req ID 1000003778			election from t		ist and click Go. Budget Valid	Total 6,000.00 USI	[Select Action]	~	Go
Fo	Req ID	another action on a requisitior Requisition Name	n, make a s BU	Date 10/23/2014	he Action dropdown li Request State	Budget	6,000.00 USE	D [Select Action]	~	Go Go
To	Req ID 1000003778	another action on a requisition Requisition Name PO 7201537 Shilpa Raja	n, make a s BU LBNL	election from t Date 10/23/2014 10/22/2014	he Action dropdown li Request State PO(s) Dispatched	Budget Valid	6,000.00 USI 1,198.00 USI	-		
	Reg ID 1000003778 1000003582	another action on a requisition Requisition Name PO 7201537 Shilpa Raja Ajay Yadav - CrysTec	n, make a s BU LBNL LBNL	election from t Date 10/23/2014 10/22/2014 10/21/2014	he Action dropdown li Request State PO(s) Dispatched PO(s) Dispatched	Budget Valid Valid	6,000.00 USI 1,198.00 USI 2,625.00 USI	[Select Action]	~	Go
	Req ID 1000003778 1000003582 1000003388	another action on a requisition Requisition Name PO 7201537 Shilpa Raja Ajay Yadav - CrysTec Shilpa - PCI Synthesis	n, make a s BU LBNL LBNL LBNL	election from t Date 10/23/2014 10/22/2014 10/21/2014	he Action dropdown I Request State PO(s) Dispatched PO(s) Dispatched PO(s) Created PO(s) Dispatched	Budget Valid Valid Valid	6,000.00 USI 1,198.00 USI 2,625.00 USI 1,198.00 USI	[Select Action]	~	Go Go
	Req ID 1000003778 1000003582 1000003388 1000003297	another action on a requisition Requisition Name PO 7201537 Shilpa Raja Ajay Yadav - CrysTec Shilpa - PCI Synthesis Robert Kaindl SPECS	n, make a s BU LBNL LBNL LBNL LBNL	election from t Date 10/23/2014 10/22/2014 10/21/2014 10/21/2014 10/20/2014	he Action dropdown I Request State PO(s) Dispatched PO(s) Dispatched PO(s) Created PO(s) Dispatched	Budget Valid Valid Valid Valid	6,000.00 USD 1,198.00 USD 2,625.00 USD 1,198.00 USD 1,650.00 USD	[Select Action] [Select Action] [Select Action]	> >	Go Go Go
	Req ID 1000003778 1000003582 1000003388 1000003297 1000003170	another action on a requisition Requisition Name PO 7201537 Shilpa Raja Ajay Yadav - CrysTec Shilpa - PCI Synthesis Robert Kaindl SPECS Rogue - Andrew Thron	n, make a s BU LBNL LBNL LBNL LBNL LBNL	election from t Date 10/23/2014 10/22/2014 10/21/2014 10/21/2014 10/20/2014	he Action dropdown I Request State PO(s) Dispatched PO(s) Dispatched PO(s) Created PO(s) Dispatched Approved PO(s) Dispatched	Budget Valid Valid Valid Valid Valid	6,000.00 USD 1,198.00 USD 2,625.00 USD 1,198.00 USD 1,650.00 USD 31,948.08 USD	[Select Action] [Select Action] [Select Action] [Select Action] [Select Action]		Go Go Go
	Req ID 1000003778 1000003582 1000003388 1000003297 1000003170 1000003158	another action on a requisition Requisition Name PO 7201537 Shilpa Raja Ajay Yadav - CrysTec Shilpa - PCI Synthesis Robert Kaindl SPECS Rogue - Andrew Thron FEI - Negest Williams	n, make a s BU LBNL LBNL LBNL LBNL LBNL	election from t Date 10/23/2014 10/22/2014 10/21/2014 10/21/2014 10/20/2014 10/20/2014	he Action dropdown I Request State PO(s) Dispatched PO(s) Dispatched PO(s) Created PO(s) Dispatched Approved PO(s) Dispatched Approved	Budget Valid Valid Valid Valid Valid Valid	6,000.00 USD 1,198.00 USD 2,625.00 USD 1,198.00 USD 1,650.00 USD 31,948.08 USD 38,386.56 USD	[Select Action] [Select Action] [Select Action] [Select Action] [Select Action] [Select Action]		Go Go Go Go

In the Requisition Details example shown below, the assigned buyer is shown; however, there is no PO information yet.

	D. I. I					New W	/indow Help Personaliz
Requisition	Details						
Requisition Sum	mary						
Business Unit	LBNL	Buyer	Goodman,Gina L		Requ	isition Name	Rogue - Andrew Thron
Date	10/20/2014	Invoice Certifier		Sole Source No			1000003170
Request State	Approved	Resource Analyst		Type of Service	1	Fotal Amount	1,650.00 USD
Requested For	AMTHRON	SAS Approver	Luo,Laura J [Deliver To Location Building: 06	7-2206K Pre-Encumbra	ance Balance	0.00 USD
ixpand lines to re equisition Lines	view shipping and accounti	ng details					
equisition Lines Line Ite	m Description	Source Status	Amount Only	r Qty	Price	Status	Total
equisition Lines Line Ite 1 🌮 Cl		Source Status Available	Amount Only No	r Qty 1.0000 Each	Price 825.00000USD	Status Approved	Total 825.00
equisition Lines Line Ite	m Description JSTOM PART DEPOSITION	Source Status	No				

Has a PO Been Assigned to My Requisition and When Was it Sent to the Supplier?

A requisition that has one of the following *Request States* has been assigned to a buyer and has been put onto a PO:

- PO(s) Dispatched
- PO(s) Created
- Received

PO information can be viewed on the Request Lifespan.

- PO Number
- PO Date (when the PO was first created)
- Due Date
- Supplier Name
- Deliver To
- Buyer

Click the "Expand Section" [•] arrow to the left of the Req ID to reveal the Request Lifespan ribbon.

Click the "Purchase Orders" icon to go to the PO Information Screen to see:

- Date dispatched (sent to supplier)
- iBox Date (date scanned into Receiving)

		an and line items for a r														
Reg ID		another action on a re Requisition Name		e a selection from tr U Date	Request Sta		I CIICK GO. Budget	Tot	al							
100013					PO(s) Dispa		Valid	100			Select Action	1	$\mathbf{\mathbf{v}}$	Go		
100013								tv Mediu		2 030 [15			·	00		
		ester Ghiorso, William Encumbrance Balance		Entered By G 0.00USD	niorso, william	в	11101	ky wearan								
	*							6		- All			<u> </u>			
Rec	quisition	Approvals	Procuren Status			chase ders	Change Request	Recei	ving	Returns	Invoid	e P	ayment			
Reques Line li											Persona	lize Find	2	Firs	: 🕚 1 of 1	Last
Line		Description	Status	Buyer		Due Date	Deliver To		Price		Quantity	UOM	Supplier			
1	2	V-BELT FOR MICRODRILL PRESS	PO Dispatch	ed KPETE	RKIN	05/15/2017	058-0106M		18.24000	USD	3.	0000 EA			;	<
100013	-	NDCX2 Thor laser F	PS L	BNL 04/22/2017	PO(s) Dispa	atched '	Valid		18.03		Select Action]	~	Go		
	37326 Requ	NDCX2 Thor laser F tester Ghiorso,William Encumbrance Balance	B	Entered By G 0.00USD	hiorso, William			ity Mediun		3 USD [[ayment	Go		
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Rec	Requ Pre-E	NDCX2 Thor laser F leester Ghiorso,William Encumbrance Balance Approvals an Approvals	B b b b b b b b b b b b b b b b b b b b	Entered By G 0.00USD	hiorso, William	B	Priori		n		s Invoi	ce F			st 🜒 1-2	of 2 🕑 Last
Reques	Requ Pre-E	NDCX2 Thor laser F leester Ghiorso,William Encumbrance Balance Approvals an Approvals	LBNI Procurer Statu	Entered By G 0.00USD	hiorso, William	B Trchase rders	Priori		n eiving		s Invoi	ce F	iayment	Fir		of 2 Last
Reques Line In	Requ Pre-E	NDCX2 Thor laser F lester Ghiorso, William Encumbrance Balance Approvals apan: ation	B B LBNL Procurer Statu	Entered By G 0.00USD	hiorso, William	B	Priori Change Request	Rece	n eiving	Returns	s Invoi	nalize Find Quantity	layment	Fir Supp		of 2 🕑 Last

luisitio	n information	1				Find	I View All	First 🕙 1 of	2 🖤 Last
	Requisitio	n ID 1000137326	Line Number		1				
PO infor	mation					Find	View All	First 🕙 1 of	1 🕑 Last
	PO Nur	nber 7349272	Buyer e	BUYER		_	Change Orde	r	
	PO	Date 04/24/2017	Supplier ID 0	00005610	6 Terms N	NET15	PO Status	s Dispatched	
Extende	ed Term End	Date	Dispatch Date 0	4/24/2017		iE	Box Receipt or	05/01/2017	
Lines				Persona	lize Find	View All 🖾	Fir	st 🕙 1 of 1 🤇	🕑 Last
Line	Item ID	Description	Merchandise Amt		UOM	PO Qty	Status	Line Details	
1		AC/DC WALL MOUNT ADAPTER 9V 18W	17.10	USD	EA	1.0000	Approved		

Where Can I see the Services Begin and End Dates?

1. Click the Req ID link to go to the *Requisition Details* screen.

Search Requisit	ions							
o locate requisition	s, edit the criteria below a	and click the Sea	arch button.					
Business	Unit LBNL	Q	Requisition	n Name				
Requisitio	on ID 1000037741	Q	Reques	st State All but Co	mplete *	~	Budget Status	
Date F	rom	81	ſ	Date To 07/09/201	5	j		
Reque	ester	10	Ente	ered By	G		POID	
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	and line items for a requis nother action on a requisit				st and click Go.			
edit or perform an			ection from the /		st and click Go. Budget	Тс	79,008.00 USD [Select Action]	

- 2. Click the Expand Section arrow \flat to the left of the Line number.
- 3. The Services Begin and End Dates are displayed for each line on this page.

Requisition Sum	mary								
Business Unit	LBNL	Buyer					Requisition Name	UC Berkeley	
Date	07/01/2015	Invoice Certifier	Valladao,Carol A	Sole Source	No		Requisition ID	1000037741	
Request State	Pending	Resource Analyst		Type of Service	Off Site Service	bes -	Total Amount	79,008.00	USD
Requested For	CAVALLADAO	SAS Approver	Lau,Peter K	Deliver To Location	Building: 074-	0316H Pre-Enci	umbrance Balance	0.00	USD
Heade	er Comments								
	Comment 1: Tec	h rep: David Romps							
Expand lines to re	view shipping and a	occounting details							
Requisition Lines									
	m Description	Source Status	Amount On	ly Qty		Price	Status	T	otal
▼ 1 🖗 NE 5		ation of Not Source	No	1.0000	Each	79008.00000	USD Pending	79,0	00.800
Li	ne Comments								
Ne		niversity of California, Berkeley alibration of stereo cameras and							
	ing computer-vision								
Shipping	1 Ship To Da	39-0150			Quantity	1 0000			
Line	U	C LAWRENCE BERKELEY LA				79,008.00000	Price Adjustmen	it	
		OR THE US DEPT. OF ENERG					1		
	0	NE CYCLOTRON ROAD, BLD	6.09		s Begin Date				
	В	ERKELEY, CA 94720		Servi	ces End Date	09/30/2016	J		
	Attention To V	/alladao,Carol A							
	Due Date								
	-								
	Accounting Li	nes							
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		e Details More Details 2	Asset Information	Budget Information		o	- Frank	4	
\frown	Dist # Status	Location	Req Qty Me	rchandlee Amt Per	cent	GL Unit Ent	ry Event Accour	nt	

Purchasing Reports

LBNL users may run standard Cognos reports to view their ePro, eBuy, and PCard purchasing transactions.

Review the FMS Help & Knowledge Base information here.

PO Modifications

Modification to Increase Funding

Regular ePro requisitions are used to request new purchase orders (POs) or to increase the funding on existing purchase orders. To add additional funding to an existing PO, create a new ePro requisition for the additional amount. In the Description field, reference the existing PO number and buyer's name.

Modification with No Add in Funding

The *LBNL PO Modification Request* screen is used to request modifications to <u>existing</u> POs that <u>do not</u> <u>cause an increase in price</u>. Examples of these types of modifications are:

- No-cost extension (e.g., extending the end date of a services agreement)
- Revised scope of work
- Cancellation of a line
- Reduction in PO funding by line
- Description change
- Requester change
- Technical representative change
- Invoice certifier change
- Project/Activity/Fund Code changes that require a split between multiple Projects/Activities/Fund Codes
- An update to existing Project/Activity/Fund Code on a line with multiple Projects/ Activities/Fund Codes (if one-for-one swap out contact your resource analyst)
- Updates to the Fund Code (Sequential Funding). View the <u>Sequential Funding Procedure</u> <u>Document</u> for information on Sequential Funding.

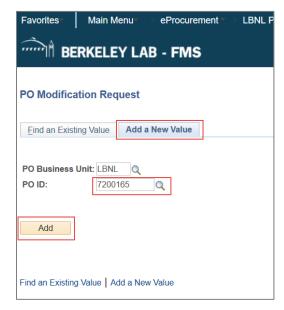
You can access the PO Modification Request screen by navigating to:

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		Enterprise Components		LBNL PO N	lod	lificat	ion	Request	
		Worklist		LBNL Proc	ure	ement	t Sta	atus	
		Tree Manager		Requisition					
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		My Personalizations		My Profile					
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Main Menu | eProcurement | LBNL PO Modification Request

This takes you to the initial PO Modification Request screen.

- Click the "Add a New Value" tab.
- Enter the PO number you want modified.
- Click the "Add" button.



Next, you are presented with the main *PO Modification Request* screen.

- Enter "Change Detail" information by describing the kind of changes to be made to the PO by the buyer.
- If you want to add an attachment:
 - Click the "Attach" button to upload the attachment.
 - Enter a description of the attachment in the Description box (not required).
- If you still need to get more information and do not want to send the request to the buyer, click the "Save for Later" button.

When you are ready to send the request to the buyer, click the "Save & Submit" button. The Modification Request Status will then show "Submitted" and the buyer will receive an email as well as an item in their Worklist to begin the process of modifying the PO as requested.

Request ID:	0000003295
PO Business Unit:	LBNL
PO ID:	7351094
Buyer:	CGHOPKINS
Change Detail:	Please extend end date to 9/30/19.
Entered By:	B_GHIORSO
Last Updated By:	B_GHIORSO
Submit Date:	07/12/2017
Modification Request Status:	Submitted
Upload your attachments	Personalize Find View All 🔄 🌆 First 🕚 1 of 1 🕑 Last
Description	Attached File Attach View Delete

• You will get an email confirmation once the buyer completes the item. Note: Once you click on "Save and Submit," you cannot edit the request. If you need to make a change, please follow the instructions below to cancel the request and submit a new one.

do-not-reply-FMS@lbl.gov					
to me 💌					
Your PO Modification Request for PO# 7351094 is now Complete					
PO Modification Request Details					
PO #: 7351094					
Buyer: Hopkins, Craig Submit Date: 2017-07-12					
Completed Date: 2017-07-19					

Cancel a PO Modification Request

To cancel an already submitted PO Modification Request navigate to:

Favorites-	Main Menu v					
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	Worklist	LBNL	Procurement Status			
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	My Personaliz	ations My Pro	ofile			
	My System Pr					
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	my reeds					

Main Menu | eProcurement | LBNL PO Modification Request

This takes you to the initial *PO Modification Request* screen.

Type in the Request ID or the PO ID for the request you want to update or search by your name in the "Requester" field for all your requests.

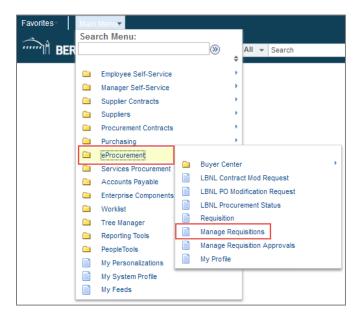
DO 14 - 115 11	D	
PO Modification	1 Request	
Enter any informatio	n you have and	click Search. Leave fields blank for a list of all values.
Find an Existing	Value Add a	New Value
Search Criter	ia	
Request ID:	begins with \checkmark	
PO Business Unit:	:= 🗸	LBNL
PO ID:	begins with \checkmark	<u> </u>
Buyer:	begins with \checkmark	Q
Supplier ID:	begins with \checkmark	Q
Requester:	begins with \checkmark	<u> </u>
Entered on:	= 🗸	31
Request Status:	= 🗸	✓
Case Sensitive		
Search C	lear Basic S	earch 🖾 Save Search Criteria
Search	Basic Si	earch 🔤 Save Search Criteria
Find an Existing Val	ue Add a New	Value

When the PO Modification Request screen opens, click on the "Cancel" button. Then, click on "Yes" to the Message. The item will be removed from the buyer's worklist queue.

PO Modification Request							
Request ID:	000003295						
PO Business Unit:	LBNL						
PO ID:	7351094						
Buyer:	CGHOPKINS						
*Change Detail:	Please extend end date to 9/30/19.			[Message		
					Do you want to Cancel the PO Modification Request. (26000,423) Please click Yes if you want to Cancel the PO Modification Request		
Entered By:							
Last Updated By:	ted By: B_GHIORSO						
Submit Date:	Submit Date: 07/12/2017				Yes	No	
Modification Request Status:	Submitted						
Upload your attachments	Personalize Find	View All 🗖		First 🕚 1	of 1 🕑 Last		
Description	Attached File	Attach	View	Delete			
1 Additional Info	IMG_0697.JPG	Attacl	View	Dele	ete 🛨		
Save & Submit Save	for Later Cancel	Comple		Re-ope			

Edit or Cancel a Requisition

You can edit (change) or cancel a requisition or requisition line that has not yet been put onto a PO by navigating to the *Manage Requisitions* screen:



Main Menu | eProcurement | Manage Requisitions

On the *Manage Requisitions* screen, search for the requisition you want to update. Type in the relevant information in the Search Requisition area of the screen and then click the "Search" button. Change the default "Requester," "Date From," and "Date To" fields to match what you are trying to find. You may also enter a specific "Requisition ID" or "Requisition Name" in their respective fields and search for a particular requisition that way. For this to work, the "Date From" and "Date To" range must be broad enough to cover when the requisition was created and the "Requester" field should be made blank. A list of your requisitions will be then be displayed.

	(ELEY LAB - F	MS	All	 Search 		>> Advan	ced Search	
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Requisition Sea	arch Keyword Sear	rch						
V Search Req	uisitions							
To locate requisi	tions, edit the criteria be	low and click the S	Search button.					
Busine	ss Unit LBNL	Q	Requisitio	n Name				
Requis	ition ID		Reque	st State All but Co	mplete 🗸	Bu	dget Status	
Dat	e From 03/14/2017	1		Date To 03/21/201	7 🛐			
Rec	uester B_GHIORSO	Q	Ent	ered By	Q		PO ID	
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To view the lifesp	an and line items for a r							
To view the lifesp To edit or perform	an and line items for a n another action on a rec	quisition, make a se	election from th	e Action dropdown				
o view the lifesp fo edit or perform Req ID	an and line items for a n another action on a rec Requisition Name	quisition, make a se BU	election from the Date	e Action dropdown Request State	Budget	Total		
o view the lifesp To edit or perform	an and line items for a n another action on a rec Requisition Name	quisition, make a se	election from th	e Action dropdown Request State		Total 900.00 USD	[Select Action]	Go
o view the lifesp fo edit or perform Req ID	an and line items for a r another action on a rec Requisition Name 1000103352	quisition, make a se BU	election from the Date	e Action dropdown Request State Approved	Budget			✓ Go ✓ Go
o view the lifesp o edit or perform Req ID 1000103352	an and line items for a r another action on a rec Requisition Name 1000103352	quisition, make a se BU LBNL	Date 03/21/2017	e Action dropdown Request State Approved Pending	Budget Valid	900.00 USD	Cancel	
To edit or perform Req ID 1000103352 1000103351	an and line items for a n another action on a rec Requisition Name 1000103352 1000103351 1000103350	quisition, make a se BU LBNL LBNL	election from the Date 03/21/2017 03/21/2017	e Action dropdown Request State Approved Pending Open	Budget Valid Valid	900.00 USD 2,300.00 USD	Cancel Edit	✓ Go

Edit an Existing Requisition

On the right side of the requisition's line, click the drop-down menu, select "Edit," and click the "Go" button.

Note that you cannot edit a requisition that has been put onto a PO by a buyer. If you wish to edit a requisition that has been put onto a PO by a buyer, contact the buyer. If the PO has not been awarded to the vendor, the buyer can cancel the PO. Cancellation of the PO will allow you to edit the requisition. Editing a requisition may restart the requisition approval workflow.

Click the "OK" button to continue.

Message	
This requisition is pending approval.	Editing this requisition may reinitialize approval process. (18036,6248)
	OK Cancel

The *Edit Requisition – Review and Submit* screen will then be displayed. You can modify this Checkout screen as you normally do. Most fields can be changed, except for "Requester." To change a line's "Description" or "Price," click on the blue Description link for the item to bring up its information on the *Special Requests* screen. After you have made changes to the line, click the "Apply" button at the bottom. This will return you to the *Edit Requisition* screen.

When finished making changes to the requisition, click the "Save & submit" button.

Favorites" Main Menu" eProcu	rement · · · Manage Regulations Regulation		
BERKELEY LAB - FM	S All v Search	Advanced Search	
Edit Requisition - Review and Sub			
Review the item information and submit the reg fr	or approval.	Ny Preferences 🗮 Regulation Satings	
Requisition Summery			
Business Unit LENL La	sinence Serkeley National Lab	Requisition Name 1000102349	
Requester 2_GHIORSO	Ghiorao, William B "Deliver To Location 055-0105V Q	Requisition ID 1000102349	
Currency USD	Invoice Cetifier	C Sole Source Flag No	
	Peacource Analyst		
Cert Summery: Total Amount 37.50 USD		Add More Items	
Expand lines to review shipping and accounting of	Copy Line 1 Project(s) and Activity(s)	to Al Unex Add More Items	
Regulsition Lines (2)	Item ID Suppler	Quantity UDM Price	Total Commenta Deleta
T IS BEAKER, MODEL XYZ	FISHER SCIENTIFIC	a Sach 7.50	37.50 Q Add
Shipping Line 1	Address UC LAWRENCE SERVELEY LAS	Add Shiple Comments Guantity 5 Price 7.50	Price Adjustment
	FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLOS.		
	EP BERKELEY, CA 94720		
	Attention To Ghorao, William S		
	Due Date		
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*Item Description	BEAKER, MODEL XYZ		
*Price	7.50	*Currency	USD Q
*Quantity	6	*Unit of Measure	EA 🔍
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Supplier			
Supplier ID	000000237	2	
Supplier Name	FISHER SCIENTIFIC	FISHER SCIENTIFIC	Suggest New Supplier
Supplier Item ID			
Manufacturer			
Mfg ID	Q	L	
Manufacturer			
Mfg Item ID			
Additional Information			
Send to Supplier	Show at Receipt	t Show at Voucher	
Request New Item			
Request New Item	A notification will be sent to	a buyer regarding this new item request.	
Apply			

Cancel or Undo-Cancel a Requisition

To "Cancel" or "Undo-Cancel" a requisition, search for it on the *Manage Requisitions* screen. On the right side of requisition's line, click the drop-down menu, select "Cancel," and click the "Go" button. (You cannot cancel a requisition that has been put onto a PO by a buyer.)

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_													
	quisitions 🕜												
		n and line items fo another action on a					n list and click Go.						
	Reg ID	Requisition Name	2	BU	Date	Request State	Budget	Tot					
•	1000214497	1000214497		LBNL	09/17/2018	PO(s) Dispatch	ed Valid		134.06 USD	[Select Action]	~	Go	
Þ	1000210562	CH_MBaran		LBNL	08/24/2018	PO(s) Complete	ed Valid		343.00 USD	[Select Action]	~	Go	
Ŀ.	1000199778	1000199778		LBNL	06/20/2018	PO(s) Dispatch	ed Valid		1,300.00 USD	[Select Action]	~	Go	
r													
	1000195464	1000195464		LBNL	05/24/2018	PO(s) Complete	ed Valid		164.97 USD	[Select Action]	\sim	Go	
▶	1000192247	1000192247		LBNL	05/03/2018	Open	Not Chk'd		138.85 USD	Cancel	\sim	Go	
►	1000157127	1000157127		LBNL	08/30/2017	Open	Not Chk'd		105.18 USD	[Select Action]	~	Go	
b.	1000157120	1000157120		LBNL	08/30/2017	Onen	Not Chk'd			[Select Action]	~	Go	
P													
	1000156456	1000156456		LBNL	08/25/2017	Open	Not Chk'd		180.02 USD	[Select Action]	~	Go	
►	1000156206	1000156206		LBNL	08/24/2017	Open	Not Chk'd		79.44 USD	[Select Action]	~	Go	
Crea	ate New Requisi	tion	Review Chan	ge Requ	est	Review Chan	ge Tracking	Mar	nage Receipts	Requisition Report	t		

On the next screen that opens, click the "Cancel Requisition" button to confirm and continue your cancellation.

Requi	isition Details for:	Daglia,Steph	anie M			
	Business Unit LBNL Requisition ID 1000192247 Requisition Name 1000192247		Date 05/03/2 Status Open Total	2018 138.85 USD		
Line D	etails					
Line	Item Description	Status	Price		Qty	Total
	1 TK17568769T Zincll Trifluoromethanesulfonat	t Open	138.84639	Each	1.0000	138.85
			Cancel Re	equisition		
Return	to Manage Requisitions					

Cancelled requisitions can be reopened by selecting "Undo Cancel" from the "Select Action" dropdown menu on the *Manage Requisitions* screen.

Cancel a Requisition Line

To "Cancel" a requisition line, search for the requisition on the *Manage Requisitions* screen. Click the Expand Section arrow to the left of the Req ID to reveal the Request Lifespan ribbon and then click the Red X to the right of the line you want to cancel.

anage Re equisition Se Search Re o locate requise	quisitio	LAB - FMS	;	ŀ	All 👻 Search	h							
equisition Se Search Repo		ns							>> Ad	vanced	Search		
equisition Se Search Repo		ns											
Search Re	arch K												
Search Re		eyword Search											
	uisitions	eyword Search											
Busin	itions, edit f	the criteria below a	nd click the S	earch butto	on.								
Duoin	ess Unit L	BNL	Q	Requis	sition Name								
Requ	sition ID		Q	Ree	quest State	All but Co	mplete	\sim		Budge	t Status		
Da	te From 0	3/09/2017	31		Date To 0	3/16/201	7	31					
Re	quester		Q		Entered By E	3_GHIORS	so	Q			POID		
Search		Clear		Show Ad	lvanced Searc	h							
equisitions	2												
view the lifes	pan and line	e items for a requisi	ition, click the	Expand tria	angle icon.								
		ction on a requisition						3o.	T-1-1				
Req ID		tion Name	BU	Date	Request 9		Budget		Total 260.00	100 15	elect Action]		Go
100010334			LBNL		17 PO(s) Cre	ated	Valid				-	~	
100010334	100010	3345	LBNL	03/15/20	17 Open		Not Chk'd		2,300.00		elect Action]	~	Go
1000103344	1000103		LBNL		17 Pending		Valid		2,300.00	JSD [Se	elect Action]	~	Go
		chez,Ignacio nce Balance		ntered By .00 USD	Ghiorso,Willia	am B	Pi	riority	Medium				
*				Ĥ		2			-	A.		Ę	>
Requisitio	n Aj	pprovals Pro	CURE DOUREMENT Status	Inven		rchase)rders	Change Reques		Receiving I	Returns	Invoice	Payment	
Request Life	enan		Status										
Line Inform									Personalize Fin	d 💷	🔢 First 🕙 1-2	2 of 2 🛞	Last
Line	ePro Special Request	SPECTROPHOTON	NETER, MODE	EL ABC	Pending Appr	oval I	Price		Quantity	UOM	Supplier		
1	Item	SPECTROPHOTON	IETER, MODE	L ABC	Pending Appre	oval 4	550.00000	USD	2.0000	EA	FISHER SCIENTIFIC	×	_
2	P ^A	MAINTENANCE AN	ID REPAIR		Pending Appro	oval (500.00000	USD	2.0000	EA	FISHER SCIENTIFIC	×	

Module 3 – Time-Saving Features

This section will cover time-saving features within eProcurement. They include:

- Global Search
- Copying a Requisition
- Using Favorites and Templates
- Personalizing Navigation (Autocomplete)
- Personalizing Requisitions
 - Setting the Field Order
 - Setting Default Values
- Applying Same Project and Activity for Entire Order
- Copying Other Data to Multiple Lines
- Using Keyboard Shortcuts

Global Search

The <u>FMS – Global Search Quick Reference Guide</u> provides instructions on how to perform a global search. A .pdf version of the guide can be obtained from <u>FMS Help & Knowledge Base</u> website (http://fms-knowledge.lbl.gov/) within the General Tips and FAQs section.

	Search this site							
FMS Help & Knowledge Base OCFO								
Knowledge Base: General Tips and FAQs Reporting / Accessing Financial Information Buying & Paying Project / Activity Setup & Funding Resource Adjustments & Accruals Planning & Proposals Strategic Partnership Projects (Formerly WFO) Other Topics	Knowledge Base > General Tips and FAQs Save time by Personalizing PeopleSoft FMS 9.2 • Tips & Tricks for Using PeopleSoft 9.2 (pdf) • Take the online Peoplesoft 9.2 Navigation Basics training Search for Reqs, Purchase Orders, Receipts and Vouchers • Use the Global Search Functionality (pdf)							
Home: Welcome System Access	what's the new Data Structure / Chart of Accounts? • New Data Architecture (LDAP) - Overview, Values, Chart of Accounts • Training: FMS1004 FMS Data Conversion Overview (from FMS 8.8 to 9.2) • Learn about Project ID Changes: Overview Training • FMS Fund Code Crosswalk How can I change Project Information on my PO or Invoice? • Project Change Scenarios for PO Invoice Certification & Changing Projects & Activities on POs (ppt)							

The search functionalities provide quick and easy options to find requisitions, purchase orders, receipts, and vouchers online from FMS. The reference guide covers two methods:

- A **Basic Search**, such as searching for a supplier name or by PO number. The basic search can be filtered by clicking on desired criteria such as "Receipts," to narrow the search.
- An **Advanced Search.** You will select desired criteria from a drop down menu such as "Requisitions" and then narrow your search by entering additional criteria such as key words, phrases, requester, and/or requisition date.

Copy Requisition

Copying an existing requisition speeds up the requisition process by allowing you to use information already entered in a similar previous requisition (this cannot be used for eBuy orders).

Favorites Main Menu SeProcurement	Manage Requisitions							
······· BERKELEY LAB - FMS	All 👻 Search		Advanced Search					
Manage Requisitions								
Requisition Search Keyword Search								
Search Requisitions								
To locate requisitions, edit the criteria below and click the Business Unit LBNL	To locate requisitions, edit the criteria below and click the Search button.							
Requisition ID	Request State Approved	~	Budget Status	~				
Date From 03/14/2017	Date To 03/21/2017	31						
Requester B_GHIORSO	Entered By	্	POID	Q				
Search Clear	Show Advanced Search							
Requisitions @								
To view the lifespan and line items for a requisition, click t To edit or perform another action on a requisition, make a		t and click Go.						
Req ID Requisition Name BU	Date Request State	Budget Total						
▶ 1000103352 1000103352 LBNL	03/21/2017 Approved	Valid	900.00 USD Copy V Go					
▶ 1000103349 1000103349 LBNL	03/17/2017 Approved	Valid	45.00 USD [Select Action] V Go					
Create New Requisition Review Change Rev	quest Review Change Tr	acking Manage	Receipts Requisition Report					

To copy a requisition:

• Navigate to the *Manage Requisitions* screen:

Main Menu | eProcurement | Manage Requisitions

- Enter the information for the requisition you want to copy within the Search Requisitions area. A list of requisitions will be displayed.
- Select "Copy" from the drop-down menu on the right side of the requisition you want to copy and then click the "Go" button. This takes you to a new *Checkout Review and Submit* screen with the copied requisition information onto it.
- Modify the fields, such as "Project" and "Requester" on the *Checkout* screen, then click the "Save & submit" button at the bottom.

Favorites & Templates

Favorites and Templates save time in entering goods or services that are ordered repeatedly (this cannot be used for eBuy orders).

- A <u>Template</u> contains one or more requisition lines that you can use repeatedly for creating new requisitions, so you do not have to enter them from scratch.
- A <u>Favorite</u> is a single line you may use often.

To **create** a Favorite or Template:

- Create an ePro requisition.
- On the *Checkout* screen, check the box to the left of the line number of the requisition you want to be added as a Favorite or Template.
- Click "Add to Favorites" or "Add to Template(s)" link.

Favorites Main Menu Requisi	tion	
BERKELEY LAB - FMS	All 👻 Search	Advanced Search
Checkout - Review and Submit		
Review the item information and submit the req for approval.		* My Preferences Requisition Settings
Requisition Summary		
Business Unit LBNL Q Lawrence Berkeley Nation	onal Lab	Requisition Name
*Requester B_GHIORSO Q Ghiorso,Willia		Priority Medium ~
currency coo	r To Location 058-0106M	Type of Services On Site Srvcs No Hands On Work
	pice Certifier	Sole Source Flag No 🗸
	urce Analyst	
Cart Summary: Total Amount 900.00 USD	Copy Line 1 Project(s) and Activity(s) to All Line	Add More Items
Expand lines to review shipping and accounting details	copy Line T Project(s) and Activity(s) to All Line	
Requisition Lines @ Line Description Item ID	Supplier Quan	tity UOM Price Total Comments Delete
	SAFETYCOMPANY COM	·
	SAFEITCOMPANY COM	1 Each 900.00 900.00 📿 Add 🗊
Shipping Line 1 *Ship		nipto Comments Quantity 1
Addr	FOR THE US DEPT. OF ENERGY	Price 900.00 Price Adjustment
	ONE CYCLOTRON ROAD, BLDG. 69	
	BERKELEY, CA 94720	
Attentior		
Due D	ate	Services Begin Date
		Services End Date
	s	
*Distribut		*Liquidate By Amt
Accounting Line		Personalize Find View All 💷 🧱 First 🚯 1 of 1 🛞 Last
<u>C</u> hartfields1	Chartfields2 Chartfields3 Details Details	
Quantity	PC Bus Unit Project	Activity Percent
	1 LBNL Q 100355	Q 062 Q 100.0000 🛨 🖃
Select All / Deselect All Select lines to:	Add to Favorites 🔯 Add to Template	e(s)
		Total Amount 900.00 USD

To **use** a Favorite or Template on a new requisition:

- Go to the eProcurement menu and select "Requisition."
- Instead of clicking the "Create Requisition" link, click the "Favorites" link or the "Templates" link.

Favorites* Main Menu* > ePro	curement ⇒ Requisition	
BERKELEY LAB - F	MS All - Search Advanced Search	
Create Requisition ② Welcome Ghiorso,William B		Checkout
Request Options	Search All V Search Adv	vanced Search
Enter search criteria or select from the menu on the right to begin creating your requisition.	Image: Catalog Browse Catalogs Browse Catalogs LBNL item Cat Image: Certain Subprimer Catalogs All Other Products Image: Special Requests Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image: Create a non-catalog request Image: Forms Create and Submit Forms Image	
	Browse Company and Personal Templates Request Services Please re-order eBuy items usi Cart History in eBuy Fixed Cost Service TEST Variable Cost Service REPAR OF CNC MILLING MA TEST Time and Materials TEST TEST2 More	-
	Browse Supplier Website Items	

- To add a <u>Favorite</u> line to a new requisition:
 - Click the "Favorites" link. This will bring-up the *Favorites* screen.
 - Select the Favorite line by checking the box to the left of the line.
 - Enter the Quantity.
 - Click the "Add" button. The line is now in the shopping cart—ready for "Checkout."

🙆 Home 🏾 🥕 My Preferences 🇱	Requisition Settings 🗮 1 Line Checkout
Search Favorites	Search Advanced Search
Favorites 👔	Manage Favorites Groups
Ungrouped Items	
Favorites	Find 1 of 1
FIRST AID TRAINING	
Item ID	Supplier
Price 500.00 USD	Supplier ID
Added to cart Quantity 2	Add
Select All WAdd Add to Favorites Group(s)	Delete from Favorites OgAdd to Template(s)
	Search Favorites

- To add a <u>Template</u> to a new requisition:
 - Click the "Templates" link. This will bring-up the *Templates* screen.
 - Enter a Quantity for the number of Template copies you want to add to your requisition.
 You can use the "Expand" arrow to the left of the Template name to see all the lines in that Template.
 - Click the "Add" button. The line is now in the shopping cart—ready for "Checkout."

Create Requisition ②				. Nei	w Window 🕜 Help [🖌 Personalize Page 🛛 📰 hl
Welcome Ukena,Amy Request Options	Search Templates	Abome	* My Preferences	Requisition Settings	「 置 <u>2 Lines</u> Search	Checkout Advanced Search
All Request Options	Templates 👔			Quantity		
Catalog	- Chemicals			2	Add 🛛	Added to cart
LBNL Item Cat	Personal Template Item	ns				Find First 1-2 of 2
eBuy MDC Vacuum Products Anacapa (Dell) USfalcon (CDW-G) GSS-Lab Supplies, Chem. & Eqmt GSS (MSC & ThorLabs) More Create Requisition Special Requests	W -	Item ID Price 1. UOM E Quantity 50 WINDOW CLEANE Item ID Price 2. UOM E Quantity 22	ach 0 R .98 USI ach	Supplier ID	S AND S SUPPLIES & SOLUTIONS 0000000449 S AND S SUPPLIES & SOLUTIONS 0000000449	
Forms						
Favorites Templates	Grazing Goats				Add Add	
ePro Services Fixed Cost Service	Req Template for	Joe H.			Add Add	

• In both cases, click the "Checkout" button and update the Quantity, Project, and Activity fields for Favorite and Template items you added to your requisition.

Navigation Personalization

Autocomplete

The autocomplete function in FMS can be enabled/disabled for lookup fields. When enabled, the system will suggest appropriate values as you type.

The system default is to autocomplete. To disable this function, click the "Main Menu" link at the top of the *FMS* screen.



In the window that opens, click the "My Preferences" link.

Sea	rch Menu:	
	>	
		\$
	LBNL Travel Expenses	×
	Employee Self-Service	•
	Manager Self-Service	•
	Supplier Contracts	÷
	LBNL Property Management	•
	Items	•
	Suppliers	•
	Procurement Contracts	•
	Purchasing	÷
	eProcurement	•
	Services Procurement	•
	Travel and Expenses	×
	Accounts Payable	÷
	Commitment Control	×
	SCM Integrations	×
	Set Up Financials/Supply Chain	×
	Enterprise Components	×
	Worklist	÷
	Tree Manager	÷
	Reporting Tools	•
	PeopleTools	×
	LBNL Utilities	×
	MAXIMO	÷
	Tax Center	
	Usage Monitoring	
	Change My Password	
	My Preferences	
	My System Profile	
	My Dictionary	
	My Feeds	

In the next widow that opens, click the grey arrow next to "Navigation Personalizations."

€ Home	My Preferences	â	Q	1	
General Settings					
		Restore	Defaults	S	ave
✓ General Options					
Accessibility Features	Accessibility features off				
Display Keyword Search Help	Yes				
Multi Language Entry	No				
Spell Check Dictionary	Use session language				
▶ Regional Settings					
System & Application Messages					
▶ I avigation Personalizations					
Pop-up Notification					
► Advanced Settings					

A list of Personalizations options will display. To disable the autocomplete function, slide the button to the left to select "No", then click on the "Save" button. The next time you log in to FMS, autocomplete will be turned off.

€ Home	My Preferences	🏫 Q 🏲 🗏 🧭
General Settings		Restore Defaults Save
	Accessibility features off	
Display Keyword Search Help	Yes	
Multi Language Entry	No	
Spell Check Dictionary	Use session language	
Regional Settings		
System & Application Messages		
Drop down Menu Sort Order	None -	
Automatic Menu Collapse	No	
Mouse over popup event	Yes	
Open new browser window	No	
Tab over Calendar Button	No	
Tab over Grid Tabs	Yes	
Tab over Header Icons	Yes	
Tab over Lookup Button	Yes	
Tab over Navigation Bar	Yes	
Tab over Browser Elements	Yes	
Tab over Page Links	Yes	
Tab over Related Page Links	Yes	
Tab over Toolbar Autocomplete		
Pop-up Notification		
Advanced Settings		

Personalization of Requisitions

Setting the Field Order

To change the order of the fields to your preference, use the following instructions.

Click the "Personalize" link in the Accounting Lines box. For this example, the *Checkout – Review and Submit* screen being modified.

Checkout - Review and Submit								
Review the item information and submit the req for a	approval.				Requisition Settings			
Requisition Summary			S: My Pre	nerences **	 Requisition Settings 			
Business Unit LBNL Cavrence Berkeley National Lab Regulsition Name *Requester B_GHIORSO G_Ghiorso,William B *Delliver To Location OSS-0106M G_Sole Source Fiag No Currency USD *Delliver Cartifier Resource Analyst *SA S Approver								
	-sas ap	pprover	Q					
Cart Summary: Total Amount 2,945.00 USD Expand lines to review shipping and accounting de	talls	Copy Line 1 Project(s) and Activity(s) to	All Lines	Add More Ib	ems			
Requisition Lines @								
Line Description	Item ID	Supplier	Quantity UOI	N	Price	Total	Comments	Delete
TI P SPECTROPHOTOMETER, MODEL ABC12		FISHER SCIENTIFIC	2 Eac	n	550.00	1100.00	🖓 Add	Û
Shipping Line 1	*Ship To Address Attention To Due Date	069-0150 UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720 Ghlorso.William B	Add Shipto Comments	Quantity Price	2	Price Adjustment		
	*Distribute By	Qty 🗸		*Liquidate By	Amt v			
	Accounting Lines	cay 🗸			Find View All	First 🛞 1 of 1	Last	
	_	artfleids2 Chartfleids3 Details	Dețalis 2 Asset inform					
	Quantity P	PC Bus Unit Project		Activity		Percent		
	2	LBNL Q		Q		Q 100.0000	•	

In the window that opens, scroll to the bottom and click the "Copy Settings" link.



In the next window that opens, type in ORDER_NUM in the "Settings to Copy" field.

Click on the "OK" button.

Copy Settings	
Copy Your Customization Settings	1
Settings to Copy: ORDER_NUM	
OK Cancel	-

Click "OK" again, when you are returned to the previous window.

Note: The settings will take effect only after you exit and return to the previous window. In this example, you would be returned to the *Checkout* screen.

Applying Same Project and Activity for an Entire Order

If the Project and Activity is the same for multiple lines in the order, you can apply this information using the "Copy Line 1 Project(s) and Activity(s) to All Lines" button on the *Checkout – Review and Submit* screen.

Note: Project(s) and Activity(s) cannot copy to lines past 125. If you have 126 or more lines, the entries must be made manually for the additional lines past 125.

Favorites-	Main Menu -	eProcu	irement≖⇒ Requi	sition							
	BERKELEY LAE	3 - FM	IS	All - Search	» A	Ivanced Search					
Create	Requisition 👔										
Welcome	relcome Ghiorso,William B 💩 Home /* My Preferences 攀 Requisition Settings 湮 0 Lines Checkout										
	Request Options		Search All	~		Search		Advanced S	earch		
			Item Entry 👔			Restricted Item List					
			Line						Find View All	쾬 🔢 🛛 First 🕚 1-3	3 of 3 🛞 Last
			Details (TTT)								
			Category	Item ID	Description	Quantity UOI	N	Price	Supplier ID	Supplier Name	
			1 41000000	۹ 🗌 🔍	Spectrophotometer, Model 📰	2 EA	Q	550.00	000000237	FISHER SCIENTIFIC	+ -
			2 41000000	aa	pH Meter, Model XYZ	1 EA	Q	875.00	000000237	FISHER SCIENTIFIC	• -
			3 41000000	aa	Air Sampler, Model 9876ZP, 11	1 EA	٩	970.00	000000237	FISHER SCIENTIFIC	± =
			Add to Cart								

Enter more than one line item on the Item Information screen and click "Add to Cart."

After the order has been added to the cart, select "Checkout."

Favorites	Main Menu v	> eProc	urement* ⇒ Requi	sition								
	BERKELEY LA	B - FN	NS	All 👻 Search		» A	dvanced Searc	:h				
Create	Requisition 👔											
Welcome	Ghiorso,William B			lome Home	My Preference	s 🏶 Requisition Settir	gs 🏼 🎘 🛓	3 Lines	Checkou	it		
	Request Options	•	Search All	~				Search	Advanced	Search		
			Item Entry 👔				Restricted I	tem List				
			Line							Find View All	💷 🔜 🛛 First 🚳 1	1 of 1 🛞 Last
			Details 💷									
			Category	Item ID	Descripti	n	Quantity	UOM	Price	Supplier ID	Supplier Name	
			1		Q			Q		Q	L	• -
			Add to Cart									

[
Checkout - Review and Submi Review the item information and submit the reg for						
review the item information and submit the req to	r approvai.		My Preferences	Requisition Settings		
Requisition Summary			-			
Business Unit LBNL Q L *Requester B_GHIORSO *Currency USD	awrence Berkeley National Lab Ghiorso, William B *Deliver To Loca Invoice Cer Resource An *SAS Appr	alyst	Regulation Nar Prio Sole Source I Q Q	rity Medium 🗸		
Cart Summary: Total Amount 2,945.00 U SD						
Expand lines to review shipping and accounting	detalls C	Copy Line 1 Project(s) and Activity(s) to A	Il Lines Add M	lore Items		
Requisition Lines @						
Line Description	Item ID 8	Supplier	Quantity UOM	Price	Total C	omments Delete
SPECTROPHOTOMETER, MODEL ABC12	F	ISHER SCIENTIFIC	2 Each	550.00 1	100.00	🖓 Add 📋
Shipping Line 1	Address U Fi	59-0150 C LAWRENCE BERKELEY LAB OR THE US DEPT. OF ENERGY NE CYCLOTRON ROAD, BLDG. 9 ERKELEY, CA 94720	Add Shipto Comments Quan		Price Adjustment	
	Attention To G	hlorso,William B				
	Due Date	ji ji				
	Accounting Lines					
	-	Qty 🗸	*Liquidate	By Amt 🗸		
	Accounting Lines			ilize Find View Ali 💷 📗	First 🛞 1 of 1 🤅	Last
	Chartfields1 Chartfie	elds2 Chartfleids3 Details D	Dețails 2 Asset Information Ass	et information 2 Budget inform	nation (TTT)	
	Quantity PC E	Bus Unit Project	Aoth	vity	Percent	
	2 LBN	L Q	٩.		Q 100.0000	+ =
PH METER, MODEL XYZ	F	ISHER SCIENTIFIC	1 Each	875.00	875.00	🖓 Add 🗎
Shipping Line 1	Address U F O	59-0150 C LAWRENCE BERKELEY LAB OR THE US DEPT. OF ENERGY NE CYCLOTRON ROAD, BLDG. PRKELEY, CA 94720	Add Shipto Comments Quan		Price Adjustment	
	Attention To G	hlorso,William B				
	Due Date	ii				
	Accounting Lines					
	*Distribute By	Qty 🗸	*Liquidate	By Amt		
	Accounting Lines		Persona	ilize Find View All 🗿	First 🛞 1 of 1 🤅	Last
	Chartfleids1 Chartfle	elds2 Chartfields3 Details D	Dețalis 2 Asset Information Ass	et information 2 Budget inform	nation	
	Quantity PC E	Bus Unit Project	Aoth	vity	Percent	
	1 LBN	a q	٩		Q 100.0000	± =

Note: The order will have more than one line item, with no Project / Activity identified yet.

On line 1, enter the Project and Activity funding the entire purchase. You can use the magnifying glass / lookup icon to help locate it.

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Comments	Delete
	SPECTROPHOTOMETER, MODEL ABC12		FISHER SCIENTIFIC	2	Each	550.00	1100.00	🖓 Add	î
	Shipping Line 1	*Ship To	069-0150	Add Shipto Comme	nts Quantity	2			
		Address	UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720		Price	550.00	Price Adjustment		
		Attention To Due Date	Ghlorso,William B						
		- Accounting Lines							
		*Distribute By	Qty 🗸		*Liquidate By	Amt 🗸			
		Accounting Lines	rtfleids2 Chartfleids3 Details	Dețalis 2 Asset		find View Ali 🗐 nation 2 <u>B</u> udget		1 🛞 Last	
		Quantity P	C Bus Unit Project		Activity		Percent		
		2	.BNL Q 100117		0.002		100.0000	• -	

If applicable, enter the Work Order number. Click the "Chartsfields3" Tab and type in the Work Order number in the "Order Number" field, or use the magnifying glass / lookup icon to select the Work Order number.

Accounting Lines				Personalize Find View All 🗐	🖪 🛛 First 🚸	1 of 1 🛞 Last
Chartfleids1 Chartfleids2	Chartfleids3	Detalls	Details 2 Asset Informat	Ion Asset Information 2 Budget	Information IIII	
Product	Source Type		Category	Suboategory	Order Number	
۹	PROCU	٩	20000 Q	Q	J12546 Q	• =

Click on the "Copy Line 1 Projects(s) and Activity(s) to All Lines" button to apply the information to all requisition lines.

Checkout - Review and Submit					
Review the item information and submit the req for	approval.		* My Preferences Requisition Set	tings	
Requisition Summary					
Business Unit LBNL	awrence Berkeley National Lab		Requisition Name		
*Requester B_GHIORSO	Ghlorso, William B		Priority Medium 🗸		
*Currency USD	*Deliver To Location 058-01		Sole Source Flag No		
	Invoice Certifier Resource Analyst	Q			
	*\$A\$ Approver	Q			
		~			
Cart Summary: Total Amount 2,945.00 USD			Add More Items		
Expand lines to review shipping and accounting of	Copy Line 1 P	oject(s) and Activity(s) to All Lines			
Requisition Lines @	Item ID Supplier	Quantity	UOM Price	Total	Comments Delete
	FISHER SCIE		2 Each 550.00	1100.00	
MODEL ABC12			-		🖓 Add 📋
Shipping Line 1	*Ship To 069-0150	Add Shipto Co	mments Quantity 2		
		E BERKELEY LAB DEPT. OF ENERGY	Price 550.00	Price Adjustment	
	ONE CYCLOT	RON ROAD, BLDG.			
	69 BERKELEY, C	A 94720			
	Attention To Ghlorso, Willia	m B			
	Due Date	Ħ			
	Accounting Lines				
		~	*Liquidate By Amt 🗸	7	
	Accounting Lines		Personalize Find View All		🛞 Last
	Chartfleids1 Chartfleids2 Ch	artfields3 Details Details 2 As	set information Asset information 2	iget information	
	Quantity PC Bus Unit	Project	Activity	Percent	
	2 LBNL C	100117	Q 002	Q 100.0000	•
The PH METER, MODEL XYZ	FISHER SCIE	NTIFIC	1 Each 875.00	875.00	🖓 Add 🛛 🗊
Shipping Line 1	*Ship To 069-0150	Add Shipto Co	mments Quantity		
	Address UC LAWREN	E BERKELEY LAB	Price 875.00	Price Adjustment	
		DEPT. OF ENERGY RON ROAD, BLDG.			
	69 BERKELEY, C				
	Attention To Ghlorso Willia	m B			
	Due Date	10 10			
	Accounting Lines				
	*Distribute By Qty		*Liquidate By Amt	1	
	Accounting Lines	×	Personalize Find View All	🗐 🛛 😨 🕴 First 🛞 1 of 1	Last
		artfields3 Details Details 2 As	set information Asset information 2	iget information	
	Quantity PC Bus Unit	Project	Activity	Percent	
	1 LBNL		Q	Q 100.0000	• =

Click on "Yes" to the confirmation warning message.

Message
Are you sure that you want to copy Line 1 Project(s) and Activity(s) to All Lines ? (26500,12)
You have elected to copy the Project(s) and Activity(s) you entered on Line 1 to all subsequent Lines. This will overwrite any Project and Activity combinations you have entered on any Lines other than Line 1. Are you sure that you want to do this?
Click on "Yes" to copy. Click on "No" to cancel copy.
Yes No

The Project and Activity (and Work Order number by clicking on the Chartfields3 tab, if applicable) is copied to all subsequent requisition lines.

▼ 2 PH METER, MODEL XYZ		FISHER SCIENTIFIC	1 Each	875.00 875	.00 ζ	🖓 Add	Î
Shipping Line 1	*Ship To Address	069-0150 UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720	Add Shipto Comments Quantity Price		ce Adjustment		
	Attention To Due Date	Ghiorso,William B					
	Accounting Lines						
	*Distribute By	Qty 🗸	*Liquidate By	Amt 🗸			
	Accounting Lines		Person	alize Find View All 💷 🛄	First 🕚 1 of 1 🛞	Last	
	Chartfields1 Ch	artfields2 Chartfields3 Details	Details 2 Asset Information Ass	et Information 2 Budget Info	rmation 💷		
	Quantity	PC Bus Unit Project	Activit	1	Percent		
	1	LBNL Q 100117	002	Q	100.0000	ŧ =	
			~ ····	~			
AIR SAMPLER, MODEL 9876ZP		FISHER SCIENTIFIC	1 Each	970.00 970	.00 (P Add	Û
Shipping Line 1	*Ship To Address	069-0150 UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720	Add Shipte Comments Quantity Price		ce Adjustment		
	Attention To	Ghiorso.William B					
	Due Date	31					
		,					
	Accounting Lines						
	*Distribute By	Qty 🗸	*Liquidate By				
	Accounting Lines		Persona	alize Find View All 💷 🌆	First 🕚 1 of 1 🛞	Last	
	Chartfields1 Ch	artfields2 Chartfields3 Details	Details 2 Asset Information Ass	et Information 2 Budget Info	rmation 💷		
	Quantity	PC Bus Unit Project	Activit	/	Percent		
	1	LBNL Q 100117	002	Q	100.0000	+ -	
Select All / Deselect All	Select lines to:	Add to Favorites 🛛 🕅 Add to	Template(s)		.00 USD		

Note: Project(s) and Activity(s) cannot copy if the Line has more than one distribution (split between multiple Projects / Activities) and Distribute By is "Qty." The following message will display if this is the case.

Click on the "OK" button.

Message
Project(s) and Activity(s) cannot copy if Line 1 has more than one distribution and is by Quantity (26500,13)
Please change the highlighted field "Distribute By" from "Qty" to "Amt", then click on the "Copy Line 1 Project(s) and Activity(s) to All Lines" button to copy the distribution to all lines.
ОК

To distribute the Project(s) and Activity(s), you will need to change the Distribute By from "Qty" to "Amt", then click on the "Copy Line 1 Project(s) and Activity(s) to All Lines" button (see Splitting Projects section on page 31).

Continue the checkout process to save and submit the requisition.

Copying Other Data to Multiple Lines

To copy data besides the Project/Activity/Work Order to multiple lines on your requisition, use the Requisition Settings function. This can be used for fields such as the Supplier, Ship To, Due Date, and Attention information when you want ALL the lines to have the same information.

After you add the lines to a requisition, click on the Requisition Settings link at the top of the page:

Checkout - Review and S	Submit								
Review the item information and submi	t the req for approval.		* Mu Pi	1	288				
Requisition Summary			f My Pr	eferences	Requisition Setting	5			
Business Unit LBNL C *Requester MBARAN *Currency USD	Inv			quisition Na Prio Sole Source	rity Medium 🗸				
Cart Summary: Total Amount 50.00 I Expand lines to review shipping and ac Requisition Lines (?)		Copy Line 1 Project(s)	and Activity(s) to All Lines		Add More Items				
Line Description	Item ID	Supplier	Quantity UON	1	Price	Total	Comments	Delete	•
TEST			1 Each	I	50.00	50.00	📿 Add	Î	Supplier Name
Shipping Line 1	*Ship To Address	069-0150 Q UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720	ShipTo Comments/Attachments	Quantit Pric		Price Adjustment			
	Attention To Due Date	Baran, Miranda		ces Begin Da vices End Da					

Requisition Settings				×
				Help
Business Unit LBNL C Lawrence Berkeley	v National Lab	R	Requisition Name	±.
	Miranda		Priority Medium	~
	Deliver To Location 033-0122E		Sole Source Flag No	 ▼
Currency	Invoice Certifier	Q		•
	Resource Analyst	~		
	Resource Analyst	Q		
Line Defaults 😨				
Note: The defaults specified below will be applied	ed to requisition lines which are available	for sourcing when there are no pre	edefined values for these field	S.
		v		
Supplier	Categor	,		
Supplier Location	Q Unit of Measur	e 🔍		
Buyer	Q			
Shipping Defaults				
Ship To 069-0150	Q			
Due Date	3 Attentio	on		
Distribution Defaults				
SpeedChart				
Accounting Defaults		Personalize Find 💷 🔜	First 🕚 1 of 1 🕑 La	ist
Chartfields1 Chartfields2 Chartfields3	<u>Details</u> <u>Asset Information</u>)		
Dist Percent	Location	GL Unit Accou	int	
1	033-0122E	LBNL	Q	-
OK Cancel				
				.:

To find a Supplier, click on the magnifying glass next to Supplier:

Requisition Settings			
Business Unit LBNL Q La *Requester MBARAN *Currency USD	wrence Berkeley National Lab Baran,Miranda *Deliver To Location 033-0122E Invoice Certifier Resource Analyst	Requisition Name Priority Medium Sole Source Flag No Q	Help
Line Defaults (?)	Supplier Search	×	
Note: The defaults specified be Supplier	Supplier ID Name Short Supplier Name Alternate Supp Name City Country Postal Code Inter search criteria to find a supplier. Select Cancel	Find Reset	
Dist Percent	Location	GL Unit Account	
1	033-0122E	Q LBNL Q E	
OK Cancel			

Enter any key words for the name of the supplier in the Name field (use the % as a wildcard) or any other identifying information such as City or State and click on Find.

Select the Supplier in the Search Results by clicking on the radio button next to the Supplier ID, and click on Select.

		Supplier ID		±.		Find			
		Name				Reset			
	Short Supp								
	Alternate S	upp Name							
		City							
		Country		Q	State	\checkmark			
Soc	Provinch Results	ostal Code				Personalize Find View		First 🕚 1-10 o	£435 🚯 Last
360		ID Supplier N	ame	Default Location	Default Location Description	Address	City	State	125 Cast
0	1 0000000001	LBNL TEN VENDOR	IPORARY	1		NOT A VALID VENDOR	BERKELEY	CA	I.
0	2 000000002	ACOPIAN	TECHNICAL CO	1		PO BOX 638	EASTON	PA	
0	3 000000013	ANIXTER	INC	1		2301 PATRIOT BLVD	GLENVIEW	IL	
0	4 0000000014	MITEL CO	MMUNICATIONS	7		5850 GRANITE PKWY STE 600	PLANO	тх	₽ ₽
0	5 000000021	MIRION T CANBERF	ECHNOLOGIES RA INC	7		GENERAL POST OFFICE	NEW YORK	NY	ا م
۲	6 0000000023	CARL ZEI	SS INC	10	CARL ZEISS MICROSCOPY LLC	PO BOX 5943	NEW YORK	NY	i i i i i i i i i i i i i i i i i i i
0	7 000000023	CARL ZEI	SS INC	5		1 ZEISS DR	THORNWOOD	NY	1
0	8 000000024	OMEGA E	NGINEERING	1		1 OMEGA DR	STAMFORD	СТ	
0	9 000000026	HI LINE U CO LLC	TILITY SUPPLY	1		PO BOX 31001-0465	PASADENA	CA	, i
0	10 000000028	REGENTS UNIVERS MINNESC	ITY OF	7		NW 5957	MINNEAPOLIS	MN	I

Enter any other information that is on the lines (i.e., Ship To, Due Date, and Attention [if different from the requester]). Click on "OK."

Requisition Settings	×
	Help
Business Unit LBNL C Lawrence Berkeley National Lab Requisition Name	
*Requester MBARAN Q Baran, Miranda Priority Medium V	
*Currency USD *Deliver To Location 033-0122E Q Sole Source Flag No V	
Resource Analyst Q	
Line Defaults 👔	
Supplier 0000000023 Q Category Q	
Supplier Location 10 Q. Unit of Measure Q.	
Buyer	
Shipping Defaults	
Ship To 400 Q	
Due Date 08/31/2018 🛐 Attention Stephanie Daglia	
Distribution Defaults	
SpeedChart	
Accounting Defaults Personalize Find 🖾 🗰 First 🚯 1 of 1 🛞 Last	
Chartfields1 Chartfields2 Chartfields3 Details Asset Information	
Dist Percent Location GL Unit Account	
1 033-0122E Q LBNL Q -	
OK Cancel	

Click on "OK" in the window that opens.

Retrofit field char	nges to all existing requisition lines/schedules not already sourced to POs. (10150,296)
OK	Cancel

Click on "OK" again to copy the information.

Г

Keyboard Shortcuts

There are many keyboard shortcuts associated with the FMS system. *Exhibit* B – *Keyboard Shortcuts* lists them. On many browsers, you can also view them by clicking Control-K on your computer keyboard to bring up a handy list of keyboard shortcuts associated with the FMS system. Learn the shortcuts to prevent ergonomic strain and aid in speedy requisition preparation.

Frequently Asked Questions

How many requisition lines should I enter?

The number of requisition lines entered into ePro should match the number of lines you expect to be received and invoiced by the vendor. Normally you enter items the same way the vendor quotes you. For example, if you are buying a system that has several parts that will be received separately and invoiced separately, the requisition should have a line for each component so Receiving can receive the partial items and Accounts Payable can pay for the partial items. (You can still have multiple quantities on a line.)

How do I change Approvers on a requisition I already submitted?

To change an approver on a requisition after the requisition has already been submitted for approval:

- Go to the *Manage Requisitions* screen and search for the requisition.
- Select the Edit drop-down menu on the right and click the "Go" button.
- Change the requisition approver.
- Click the "Save & submit" button.

You may want to do this when you determine that the original approver is not immediately available to approve the requisition. Requisitions can be changed any time before the buyer puts them into a purchase order.

Why isn't my requisition assigned to a buyer and placed?

One reason why a requisition may not be progressing to a PO is that it has not yet been approved by the requisition approver. Requisition preparers should periodically review the "Request State" column on their *Manage Requisitions* screen. Requisitions go to:

• Open status when the "Save for Later " button is clicked

- Pending approval status when the "Save & submit" button is clicked
- Approved status when all approvers approve the requisition

(The Status can also say PO Created, PO Dispatched, Received, Denied, or Canceled.)

You may also contact the buyer directly to check on the requisition's status.

If there is no buyer assigned after the requisition has been approved for a day, contact the appropriate <u>Procurement Manager</u> to check the status.

How can a new Approver be set up in ePro/eBuy?

ePro requisitions and eBuy transactions (generally over \$1,000) require the approval of a division Authorized Signer. The list of individuals in the Signature Authorization System (SAS) is accessible from <u>Cognos</u> under the "HR" heading.

HR ∋			
	Name 🗘		Actions
a	Authorized Signer List (SAS)		🔲 🕨 🔡 More
<u>演</u>	Employee Headcounts		🔲 🕨 🔡 More
a	Employee Hires and Terminations		🔲 🕨 🔡 More
a	Employee Lookup		🔲 🕨 🔡 More
	Employee Roster		🔲 🕨 🔡 More
	Employee Roster by LETS Approve	r/Timekeeper/Org	🔲 🕨 🔡 More
	Job Code List		🔲 🕨 🔡 More
	LETS Roles - Approvers/Backups/1	mekeepers/Inputters	🔲 🕨 📸 More

<u>LBNL RPM on Signature Authority for Financial Transactions</u> provides policy on signature authorization and requirements.

The <u>Delegation of Signature Authority</u> form (which is inside of the above procedure) is filled in and sent to the Office of the Chief Financial Officer (Mary Beedle x4035) for processing.

All employees with signature authority must successfully complete a standard online training course, provided by the Office of the CFO. See the <u>Signature Authority Guidelines</u> webpage.

Glossary

Here are definitions of common *Roles* and *Terms* associated with eProcurement:

	Roles		
Requester	Anyone with an LBNL employee number and email address (either an employee or guest) who needs goods or services from a supplier.		
Requisition Preparer	An individual (either employee or guest) who completed the online eProcurement (ePro) Requisition Preparer course and therefore was granted authority to create ePro requisitions. These sometimes appear as "Entered By" on ePro screens.		
	A requisition preparer may also be a requester on an ePro requisition.		
Approver	An individual who electronically approves an ePro requisition in the Financial Management System (FMS). All requisitions over \$1,000 must be approved by an Authorized Signer who appears in the Signature Authorization System (SAS) and who has sufficient dollar authority for the requisition amount.		
	Other approvers may be added automatically to a requisition by the ePro system. These include Division, Division Project, OCFO Division Management (high-dollar), and item category code approvers.		
Certifier	A division Laboratory employee (not a guest) who has been designated in a requisition/purchase order (PO) to certify invoices before they can be paid. Invoice certification may be required for services in excess of \$5,000 or based upon the item category (e.g., software, design and construction, fabrication, consultant/personal services, research and development, and subcontracts that have quality assurance requirements, complex equipment configuration, and/or payment milestones). See the <u>LBNL RPM section on Invoice Certifications</u> for more information about the certification process.		
Buyer/ Subcontract Administrator/ Procurement Specialist	A Procurement employee who is authorized to issue purchase orders / subcontracts.		

	Terms
Approval Threshold	A dollar-limit that, when exceeded, requires approval. Divisions establish their own requisition approvals for requisitions that are billed to their projects. Various approvals are required when the total requisition amount exceeds the established approval thresholds. ePro automatically routes requisitions to these approvers.
	For <u>SAS Dollar Amount Approval</u> , all requisitions over \$1,000 must be routed for approval to an individual in the Signature Authorization System (SAS). The SAS approver must have sufficient dollar authority in SAS to cover the total requisition amount.
	For <u>Division Approval</u> , a division may additionally require that all requisitions with a division requester, regardless of amount, be routed to a specific division approver for centralized control of funds.
	For <u>Division Project Approval</u> , a division may also designate to have all of its requisitions routed to the named individuals on its projects for requisitions over \$1,000.
	For <u>OCFO Division Management Approval</u> , requisitions over \$500,000 are routed to a specific division individual for approval.
Blanket Subcontract	A blanket subcontract provides for ordering of an indefinite quantity of specific goods or services during a fixed period of time. Generally, verbal releases by specified individuals are made for individual requirements with maximum dollar limitation or maximum number of units. Releases against the blanket subcontract are not entered into FMS and invoices are paid against the blanket subcontract.
eProcurement (ePro)	The Oracle/PeopleSoft software module in FMS that is used for obtaining goods an services at the Lab from suppliers. It allows for creation of ePro requisitions, requisition approvals, purchase orders, and receipts, while integrating with FMS accounting modules.
Financial Management System (FMS)	The enterprise Oracle/PeopleSoft software product that the Laboratory uses to manage its financial operations, including accounting and procurement. You can access it by going to <u>http://fms.lbl.gov.</u>
Goods	Goods are products that are the result of a tangible output of a process that has physical dimensions. Generally, they are produced in a facility separate from the purchasing customer. They can be produced to meet very tight specifications day-i and day-out with essentially zero variability.
	General categories of goods are:
	Biological and Chemical
	Computers
	Products for Construction and Maintenance of Facilities
	Electrical, Electronic, and Fabrications
	Laboratory Equipment and Supplies
	Office Equipment and Supplies

Item Category Codes	Item category codes classify, in general terms, requisition lines entered by ePro requisition preparers. There are approximately 91 codes such as Furniture, Environmental Services, and Radioactive Isotopes. It is important that the right item category code be selected for each line since these codes are used to route requisitions for safety approvals, assign requisitions to buyers, create reports, and determine the accounting/burdens.
Manage Requisitions - Request Lifespan	The area of the ePro <i>Manage Requisitions</i> screen that displays the steps a requisition has gone through, from Requisition to PO to Payment. It is visible when you click the arrow to the left of the Req ID to expand the section. You can click colored icons to get further information on that transaction.
Master Agreement	Requisition Approvals Production to the Laboratory. Inventory Purchase Orders Change Request Receiving Returns Invoice Payment
	Initiation of work under a master agreement is requested by submitting a purchase requisition to Procurement. Purchase orders are awarded to the subcontractor that form individual funded subcontracts subject to the terms of a master agreement. Orders under the master agreement are entered into FMS and invoices are paid against the individual purchase orders.

Off-Site Services	Off-Site Services are services performed at a location other than a Berkeley Lab/DOE
On-Site Services	site.
	<i>On-Site Services</i> are services performed on the Laboratory's hill or at Laboratory-controlled offsite/leased facilities.
	There are two types of On-Site Services:
	On-Site Services Hands-On Work require a Subcontractor Job Hazard Analysis (sJHA) and involve:
	Use of hand or power tools
	• Repair or service of a device, apparatus, machine, or mechanism
	 Material handling (except delivery of purchased items)
	 Handling or disposing of a chemical, compressed gas, or hazardous, radioactive, or bio-hazardous material
	Construction and related real property modifications/improvements
	On-Site Services No Hands-On Work do not require an sJHA and involve:
	Office and administrative work
	Computer programming
	Attending or making a presentation
	• Supervision of a worker(s) who is not performing hands-on work
	Document archiving
	Financial auditing
	Photography
	Language translation
	Providing classroom training
PCard Order	A purchase from a supplier using a Laboratory credit card (PCard). The purchase is entered as an order in FMS by Procurement and division cardholders who have special training for issuing these orders. Bank transactions are used to pay for PCard orders (instead of using invoices and checks/wire transfers, as is the case for regular POs).
Purchase Order (PO) /	A Purchase Order (also called a PO or subcontract) is a document sent to a
Subcontract	supplier (also called a subcontractor) that directs it to furnish goods or services to the Laboratory. The PO is created from an approved ePro requisition. The Procurement department then sends a purchase order with its own unique PO number to the supplier.
Requisition	An ePro requisition is an online form that requests the purchase of goods or services from a supplier. Once entered, a requisition number is assigned by ePro. If required by the division, the requisition is then routed to one or more approvers for online approval.

Restricted Items	Any item that:
	Has inherent safety hazards
	Requires special controls and/or authorizations
	If handled improperly, may:
	 hurt people
	 harm the environment
	 damage equipment
	 result in citations or DOE-reportable occurrences
	When a restricted item is being purchased, the requisition lines should reflect the item category code that corresponds to the item so the requisition is routed for any required special approvals.
	The Procurement Department maintains the <i>Restricted Item List</i> , which is available via the Berkeley Laboratory Home Page A to Z Index.
Services	Services are intangible processes that cannot be weighed or measured. Some degree of interaction with the customer is necessary for services. The interaction may be brief, but it must exist for the service to be complete. Where face-to-face service is required, the service facility must be designed to handle the customer's presence. Services are inherently heterogeneous—they vary from day to day and even hour by hour as a function of the attitudes of the customer and the servers.
	General categories of services are:
	Facility-Related Services
	Lease / Rental Services
	Personnel and Effort-Related Services
	Special and Other Services
Service Center Team	The group in the Procurement department with buyers who process low-value purchases (\$25,000 and less) and Procurement Card (PCard) orders.

Sole Source	The restriction of competition to a single source of supply. A written sole source is appropriate when only a single supplier can meet the needs of a requester. A written <i>Sole Source Justification</i> form is required for:
	 Non-competitive procurement for any product or service over \$250,000. It is not required:
	 For consulting services
	 If the subcontract will be awarded to a collaborator under a successful Berkeley Lab research proposal, and the subcontractor is identified in the award notice or other documentation. In this situation, send the award notice or other documentation with the requisition.
	• Research or other support from a UC Campus over \$25,000. It is not
	required for:
	 UC student tuition and fees remission for students employed by the Laboratory, generally as Graduate Student Research Assistants (GSRAs), for which such remission is part of the student's compensation package
	 Joint Appointee IUTs or Multi-Location Assignments
	• Items or services from another DOE Facility Contractor over \$250,000.
	The need to restrict competition may be justified by one of the following reasons:
	 Unique capability, expertise, facilities, or equipment that no other source can provide to satisfy the Laboratory's requirements
	Compatibility with existing equipment and/or standardization of parts
	 Follow-on work for continued development or enhancement of a specialized system, equipment, or services, when it is likely that award to a source other than the incumbent subcontractor would result in substantial duplication of costs (relative to overall costs) that would not be recovered or would cause unacceptable delays in fulfilling the program needs
	 Identified source is acknowledged to be the leader in its field of expertise as demonstrated in reputable and valid literature, symposia presentations, etc. While normally not appropriate for commercial goods and services, this identification may be appropriate in subcontracting for research and development.
	 An unusual or compelling urgency exists that would cause an adverse or programmatic impact (generally related to schedule, security, regulatory, environmental, safety, or health issues) of such a nature and magnitude that a sole source justification is merited
	• To establish or maintain a source for industrial mobilization or an essential engineering, development, or research capability
	 Services of an expert or neutral person for any current or anticipated litigation or dispute

	Authorized or required by statute or International agreement
	National security or public interest
	 Unique bonding, insurance, or indemnification requirements (applies if a Large Business is selected in lieu of a Small Business)
Splitting a Requisition	When a requirement for same goods or services is split among two or more requisitions in order to avoid approvals or documentation. Splitting requisitions must not be done since it provides an inaccurate picture of the total purchase and creates duplicate work.
Status – Requisition	These are FMS system statuses for requisitions that are visible on the <i>Manage Requisitions</i> screen in the "Requisition State" column:
	<u>Open</u> : A requisition has been created and saved but not submitted for approval for further processing.
	<u>Pending</u> : A requisition was submitted to an approver using the ePro "Save & Submit" button and is awaiting approval.
	<u>Approved</u> : The requisition was approved by the approver(s). In this status, the requisition may have also been assigned to a PO or to a Procurement Card (PCard) Order. Once a requisition has been placed on a PO or PCard order, it cannot be changed.
	<u>PO Created</u> : A PO has been created but not yet Dispatched (sent to the supplier).
	PO Dispatched: The PO was placed/sent to the supplier.
	<u>Received</u> : Some of the items on the PO may have been formally received at LBNL Receiving.
	<u>Canceled</u> : The requisition was canceled and will not be processed further. The Undo-Cancel feature can be used to reopen a Canceled.
Status – LBNL Procurement	These are the buyer-entered statuses for POs that are visible on the <i>Manage Requisitions</i> screen "Lifespan" section, "LBNL Procurement Status" icon:
	Developing RFP/Solicitation
	RFP/Solicitation Out for Bid
	Proposals Received
	Evaluating Proposal(s)
	Negotiating with Potential Supplier
	Preparing Subcontract Documents
	Awaiting CRB (Contract Review Board) Review
	Waiting Approval
	Waiting on Documentation from Requester
	Waiting on Documentation from Supplier

Status – Purchase Orders	These are the FMS system statuses for POs:
	<u>Open</u> : The PO was created but probably not yet placed / dispatched /sent to the supplier.
	<u>Approved</u> : The PO was approved by the buyer and should automatically change to <i>Dispatched</i> status within 20 minutes.
	Dispatched: The PO was placed / sent to the supplier.
	<u>Complete</u> : The PO is closed. All invoices and receipts have been processed against the PO and all of the obligations of the supplier and LBNL have been satisfied. Liens are removed and no further invoices or receipts may be made on the PO.
	<u>Canceled</u> : The PO was canceled—normally because it should not have been issued in the first place. No invoices or receipts were processed on the PO.

Exhibits

- A. Consultant Services
- B. Keyboard Shortcuts

Exhibit A – Consultant Services

Consultant services are the advisory and/or assistance services of an expert who personally renders the services to the Laboratory on a short-term or intermittent basis. Consultants provide technical, scientific, engineering, and/or administrative expertise not otherwise available to the Laboratory. Consulting services may consist of providing information, advice, opinions, alternatives, conclusions, recommendations, or consultation to Laboratory personnel in the form of studies, analysis, and evaluations.

Consultant services may be provided under a consultant agreement or a personal services agreement.

- A Consultant Agreement is an agreement between the Laboratory and an individual with special knowledge or expertise for the performance of consultant services.
- A Personal Services Agreement is an agreement between the Laboratory and an established company, which makes available by name one or more of its employees as consultants.

To obtain the services of a consultant, submit an ePro requisition and attach the <u>Request for</u> <u>Consultant/Personal Services Agreement</u> form to its first line.

Procurement then establishes a Consultant Agreement or Personal Services Agreement to obtain the services of a consultant.

For details see <u>LBNL RPM on Consultants to Berkeley Lab, Hiring</u>.

Exhibit B - Keyboard Shortcuts

Accessing Your Application Using the Keyboard

Keyboard navigation is controlled by Hot keys and Access keys.

List of Hot Keys

Alt 1 -- Executes different buttons depending on the page type:

- > Save button on the Toolbar in a page
- > OK button on a secondary page
- > Search or Add button on a Search or Lookup page
- Alt 2 -- Return to search
- Alt 3 -- Next in list
- Alt 4 -- Previous in list
- Alt 5 -- Valid lookup values
- Alt 6 -- Related links
- Alt 7 -- Insert row in grid or scroll area
- Alt 8 -- Delete row in grid or scroll area
- Alt 0 -- Refreshes the page by invoking the Refresh button on the Toolbar
- Alt . -- Next set of rows in grid or scroll area [e.g., Alt period]
- Alt , -- Previous set of rows in grid or scroll area [e.g., Alt comma]
- Alt / -- Find in grid or scroll area [e.g., Alt forward slash]
- Alt ' -- View all in grid or scroll area [e.g., Alt prime]
- Alt \ -- Toggle between Add and Update on the Search page [e.g., Alt backslash]
- Ctrl J -- System Information
- Ctrl K -- Keyboard Information
- Ctrl Y -- Toggle menu between collapse and expand
- Ctrl Tab -- Toggles focus through the frame set
- Enter -- Invokes the following buttons where present: OK, Search, Lookup

Esc -- Cancel

Alt ; -- Context Menu

List of Access Keys

Alt 9 -- Takes you to the Help line Alt \ -- Takes you to the Toolbar [e.g., Alt backslash Enter] Ctrl Z -- Takes you to the Search box of the Menu

Menu Access Keys

The **Ctrl Z** combination will focus your cursor onto the menu system. From there, you can use your tab key (or shift-tab to reverse direction) to navigate through the menu hierarchy.

About Access Keys and Hot Keys

> An Access Key is an Alt key combination that moves focus to a specified field on the current page. For example, Alt \ moves focus to first button on the Toolbar. Then pressing the Enter key would invoke that action. Alternatively, you may use the Tab key to move you to the next Toolbar button. > A Hot Key performs an immediate action. For example, when focus is in a field that has lookup processing, Alt 5 invokes the Lookup page without having to press the Enter key.