Office of the Chief Financial Officer

ePro 9.2 User Guide

5/20/2020

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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 FSM1406 ePro Requisition Preparer Training 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 (http://procurement.lbl.gov) and by clicking here.
- A list of trained ePro requisition preparers is on the Procurement website in the *Make a Purchase* ePro section. It can be searched by Laboratory organization code and location.
- Optional FMS1407 ePro Requisition and eBuy Approver Training 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:

- Module 1 – "Key Concepts" addresses requisition business processes and policies.
- Module 2 – "Creating and Approving ePro Requisitions" covers the creation, approval, viewing, and maintenance of requisitions.
- Module 3 – "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.

- Customer Guide for Construction
- Customer Guide for Goods and Services
- Customer Guide for Research and Development
- 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)
- Electrical Equipment Procurement Guide for Researchers

Guides for customers are accessible from the Procurement & Property ePro web page under the right-hand 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 eBuy web page to log into eBuy, view a list of eBuy suppliers, and access videos and guides to help you learn to use eBuy.

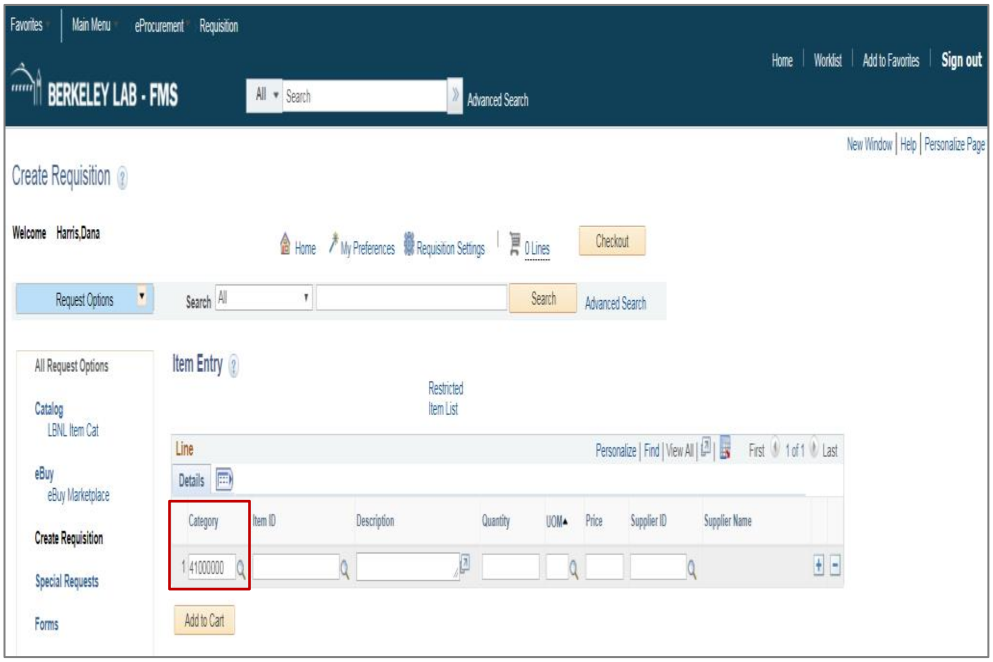
  View eBuy Time-Saving tips to help you shop efficiently.

- Berkeley Lab IT maintains a **repository of software** available for purchase or download at software.lbl.gov. 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 low-value, 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 *Division Cardholders Policy and Guidelines*, *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 Make a Purchase website, listen to the Procurement Channels webinar, or contact the Procurement Help Desk at ProcurementHelp@lbl.gov.

Item Category Codes

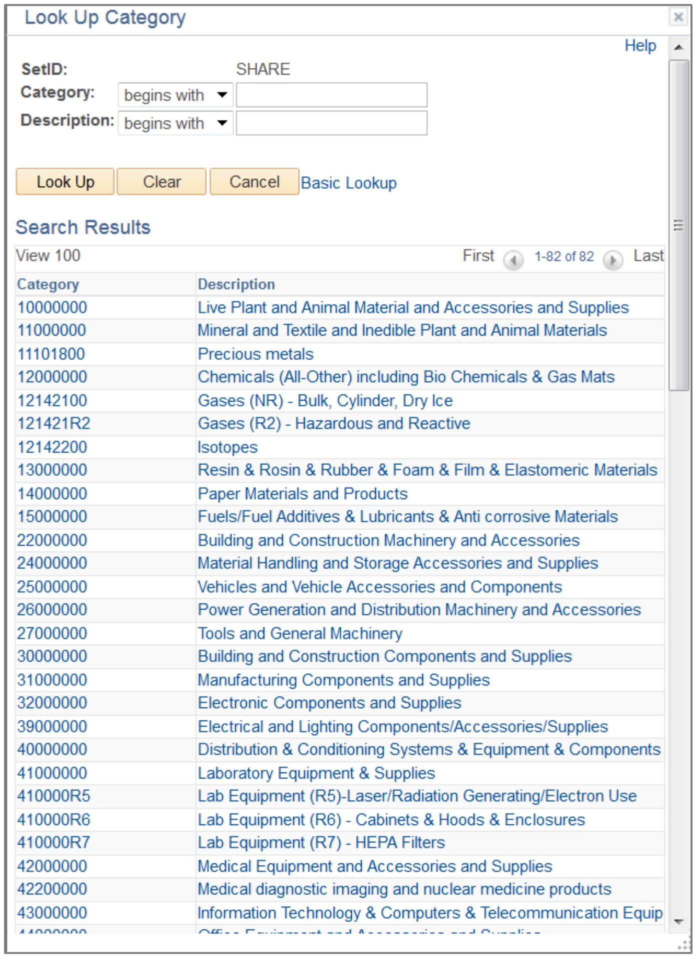


Item category codes classify, in general terms, requisition lines entered by ePro requisition preparers and are integral to the requisition creation and routing process. In FMS, Item Categories are stored and are searchable by both their long descriptions and their numeric or abbreviated codes. An item category code is selected by either typing part of its name or code or by using the lookup 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 Category

Help

SetID: SHARE

Category: begins with

Description: begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results

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 Animal Materials
11101800	Precious metals
12000000	Chemicals (All-Other) including Bio Chemicals & Gas Mats
12142100	Gases (NR) - Bulk, Cylinder, Dry Ice
121421R2	Gases (R2) - Hazardous and Reactive
12142200	Isotopes
13000000	Resin & Rosin & Rubber & Foam & Film & Elastomeric Materials
14000000	Paper Materials and Products
15000000	Fuels/Fuel Additives & Lubricants & Anti corrosive Materials
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
40000000	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.

Goods 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

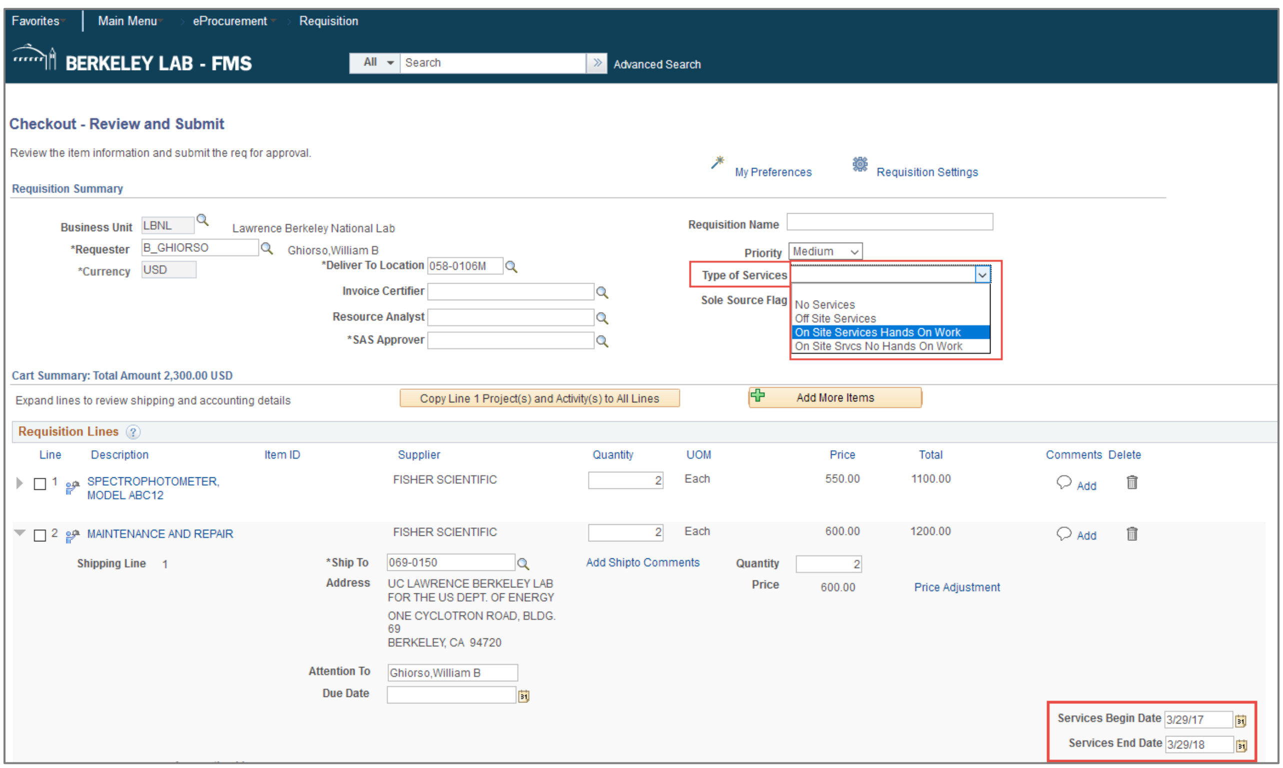
- Laboratory Equipment and Supplies
- Office Equipment and Supplies

Services 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.



- The requisition preparer must select the Type of Service 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).

- Service Begin Date and Service End Date 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 Due Date 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

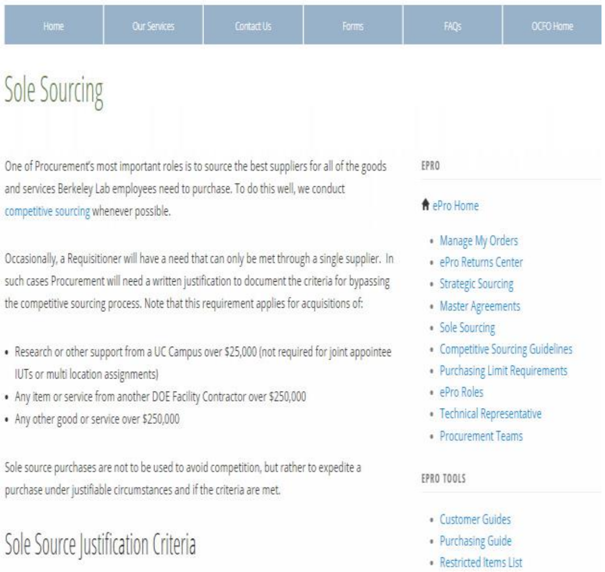
commercial goods and services, this identification may be appropriate in subcontracting for research and development.

- 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



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Sole Sourcing

One of Procurement's most important roles is to source the best suppliers for all of the goods and services Berkeley Lab employees need to purchase. To do this well, we conduct competitive sourcing whenever possible.

Occasionally, a Requisitioner will have a need that can only be met through a single supplier. In such cases Procurement will need a written justification to document the criteria for bypassing the competitive sourcing process. Note that this requirement applies for acquisitions of:

- Research or other support from a UC Campus over $25,000 (not required for joint appointee IUTs or multi location assignments)
- Any item or service from another DOE Facility Contractor over $250,000
- Any other good or service over $250,000

Sole source purchases are not to be used to avoid competition, but rather to expedite a purchase under justifiable circumstances and if the criteria are met.

Sole Source Justification Criteria

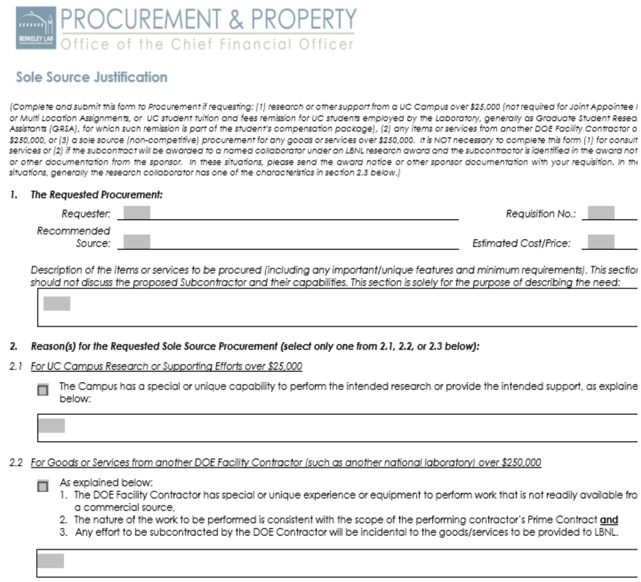
EPRO

ePro Home

- Manage My Orders
- ePro Returns Center
- Strategic Sourcing
- Master Agreements
- Sole Sourcing
- Competitive Sourcing Guidelines
- Purchasing Limit Requirements
- ePro Roles
- Technical Representative
- Procurement Teams

EPRO TOOLS

- Customer Guides
- Purchasing Guide
- Restricted Items List



PROCUREMENT & PROPERTY
Office of the Chief Financial Officer

Sole Source Justification

(Complete and submit this form to Procurement if requesting: (1) research or other support from a UC Campus over $25,000 (not required for Joint Appointee I or Multi Location Assignments, or UC student tuition and fees remission for UC students employed by the Laboratory, generally as Graduate Student Resea Assistants (GRSA), for which such remission is part of the student's compensation package), (2) any items or services from another DOE Facility Contractor o $250,000, or (3) a sole source (non-competitive) procurement for any goods or services over $250,000. It is NOT necessary to complete this form (1) for consult services or (2) if the subcontract will be awarded to a named collaborator under an LBNL research award and the subcontractor is identified in the award not or other documentation from the sponsor. In these situations, please send the award notice or other sponsor documentation with your requisition. In th situations, generally the research collaborator has one of the characteristics in section 2.3 below.)

1. The Requested Procurement:

Requester: ______ *Requisition No.:* ______

Recommended Source: ______ *Estimated Cost/Price:* ______

Description of the items or services to be procured (including any important/unique features and minimum requirements). This sectio should not discuss the proposed Subcontractor and their capabilities. This section is solely for the purpose of describing the need:

2. Reason(s) for the Requested Sole Source Procurement (select only one from 2.1, 2.2, or 2.3 below):

2.1 *For UC Campus Research or Supporting Efforts over $25,000*

☐ The Campus has a special or unique capability to perform the intended research or provide the intended support, as explaine below:

2.2 *For Goods or Services from another DOE Facility Contractor (such as another national laboratory) over $250,000*

☐ As explained below:
1. The DOE Facility Contractor has special or unique experience or equipment to perform work that is not readily available fro a commercial source,
2. The nature of the work to be performed is consistent with the scope of the performing contractor's Prime Contract **and**
3. Any effort to be subcontracted by the DOE Contractor will be incidental to the goods/services to be provided to LBNL.

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 [Make a Purchase]() page.

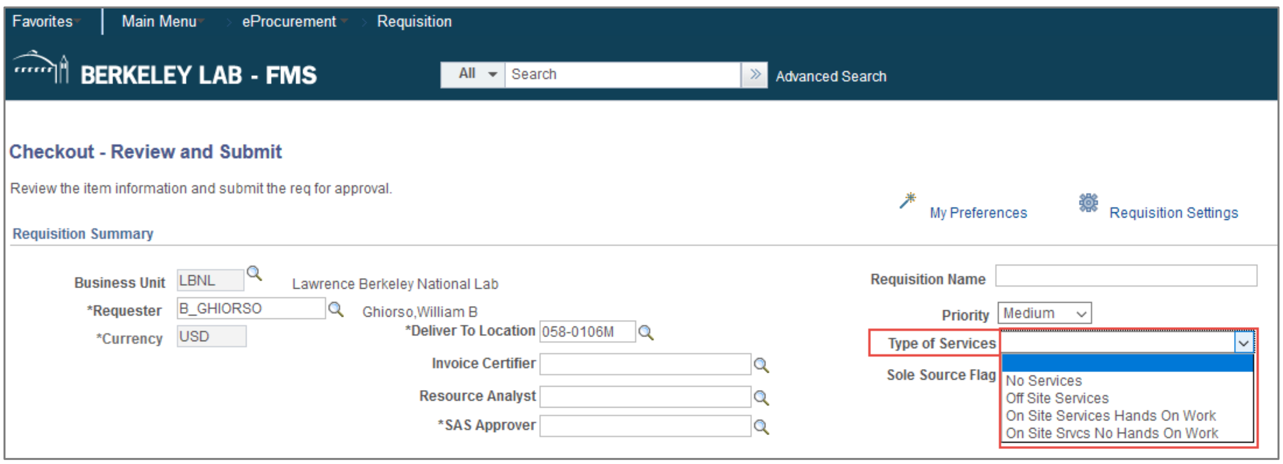
The form is also provided under the "Forms" link on the Procurement & Property Management website at http://procurement.lbl.gov.

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 [LBNL sJHA website.]()

Type of Service Field



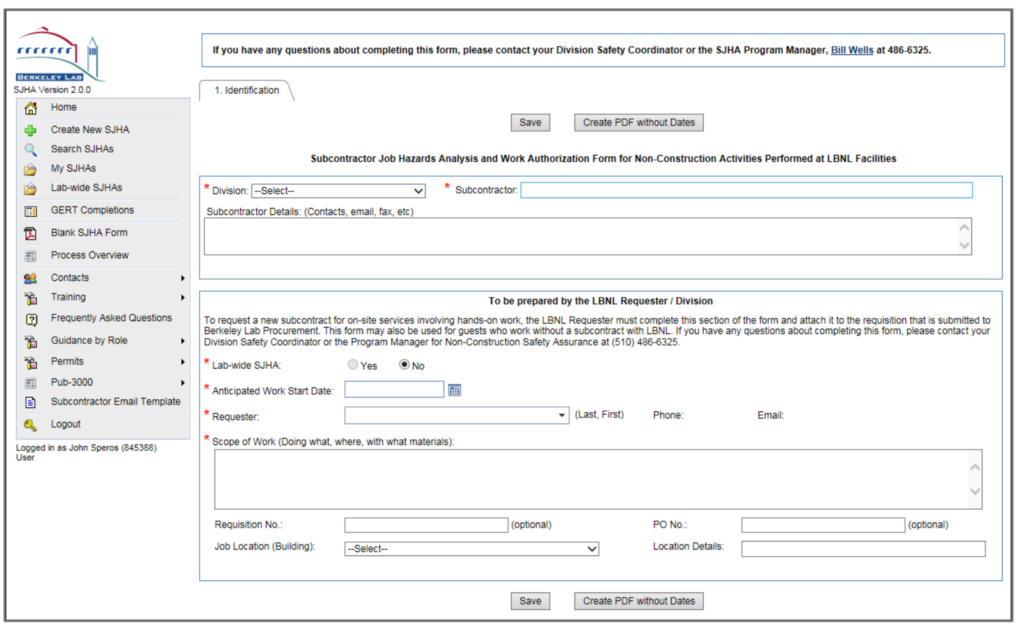
Requisitions for services must indicate the Type of Service that is being acquired. Select:

- No Services when there are no services being provided by the supplier (only goods will be sent)
- Off-Site Services when the supplier will only be providing services at an off-site location (a location other than a Berkeley Laboratory/DOE site)
- On-Site Services Hands-On Work 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 bio-hazardous material
  - Construction and related real property modifications/improvements

- On-Site Services **No** Hands-On Work 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.


SJHA Version 2.0.0

Home
Create New SJHA
Search SJHAs
My SJHAs
Lab-wide SJHAs
GERT Completions
Blank SJHA Form
Process Overview
Contacts
Training
Frequently Asked Questions
Guidance by Role
Permits
Pub-3000
Subcontractor Email Template
Logout

Logged in as John Speros (845388) User

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.

1. Identification

Save | Create PDF without Dates

Subcontractor Job Hazards Analysis and Work Authorization Form for Non-Construction Activities Performed at LBNL Facilities

* Division: --Select-- * Subcontractor:

Subcontractor Details: (Contacts, email, fax, etc)

To be prepared by the LBNL Requester / Division

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 submitted to 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 your Division Safety Coordinator or the Program Manager for Non-Construction Safety Assurance at (510) 486-6325.

* Lab-wide SJHA: Yes No

* Anticipated Work Start Date:

* Requester: (Last, First) Phone: Email:

* Scope of Work (Doing what, where, with what materials):

Requisition No.: (optional) PO No.: (optional)

Job Location (Building): --Select-- Location Details:

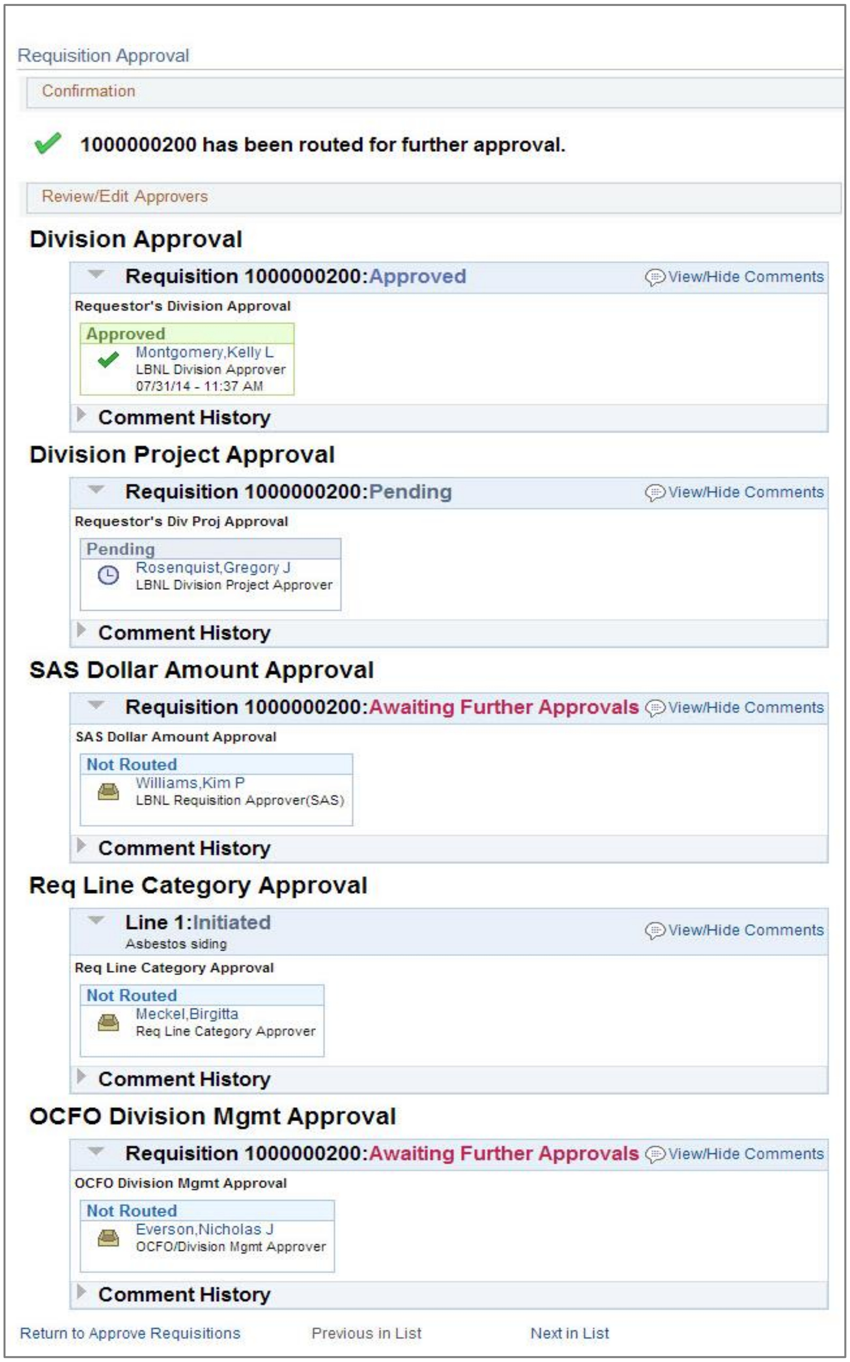
Save | Create PDF without Dates

- 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



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. Division Approval 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. Division Project Approval 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.

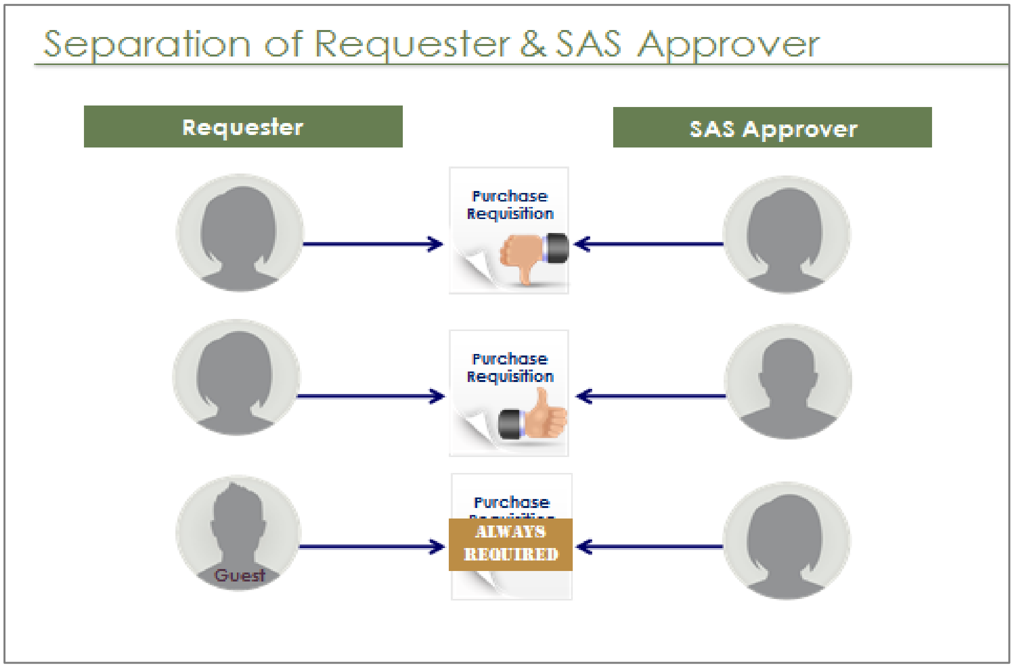
3. Signature Authorization System (SAS) Dollar Amount Approval is required for all requisitions over $1,000. Here, the requisition preparer selects a division approver from the *Signature Authorization System* (SAS) with sufficient dollar authority in SAS to cover the total requisition amount.

4. Requisition Line Item Category Approval 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. OCFO Division Management Approval 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 http://fms.lbl.gov into your browser's address bar and hitting "Enter".

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

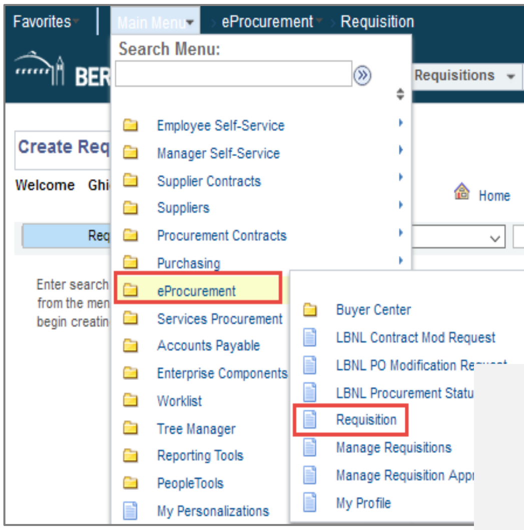
At the login screen, enter your LDAP (email) User ID, Password, and MFA [if enabled].

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

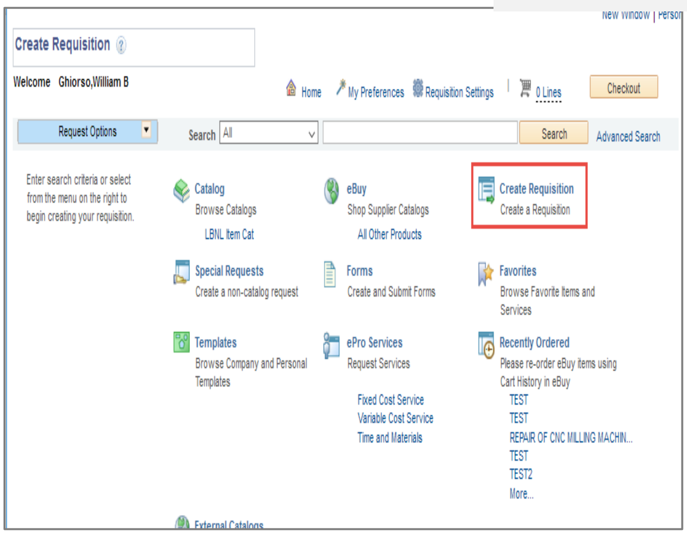
Many screens have a "Business Unit" box defaulted to *LBNL*. You may leave this value as *LBNL*.

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.



1. Log on to FMS at http://fms.lbl.gov
2. Click **eProcurement**
3. Click **Requisition**
4. Choose **Create Requisition**



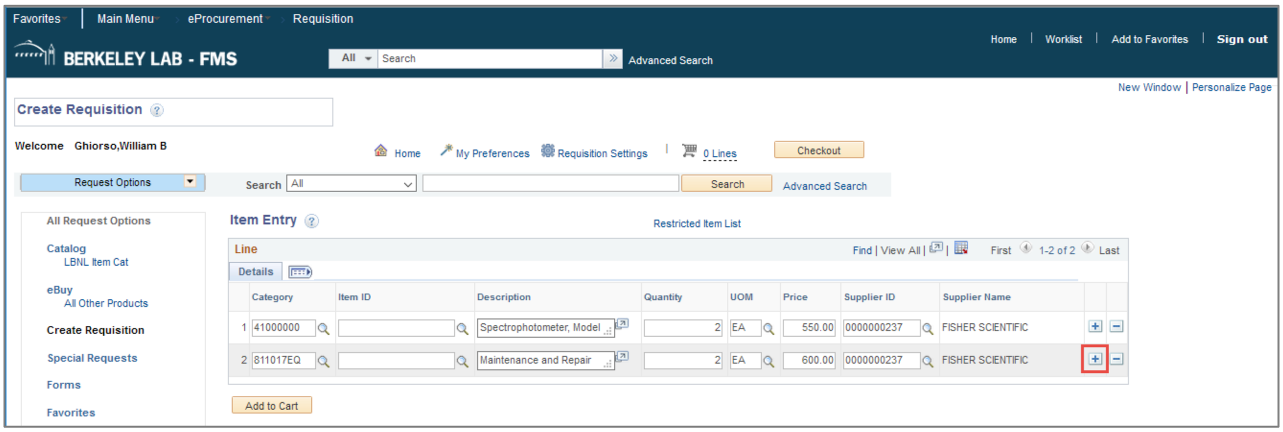
Remote Access:

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 Software Download Page.
- 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 IT's Remote Access webpage. 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



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 each line, 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 Category field, either type in an item category code or use the lookup icon to search for a category that most closely describes the line.

  A link to the most recent *Item Category Codes List* and the *Restricted Item List* are available for your convenience.

- Leave the Item ID field blank, unless directed by the buyer.

- In the Description 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.

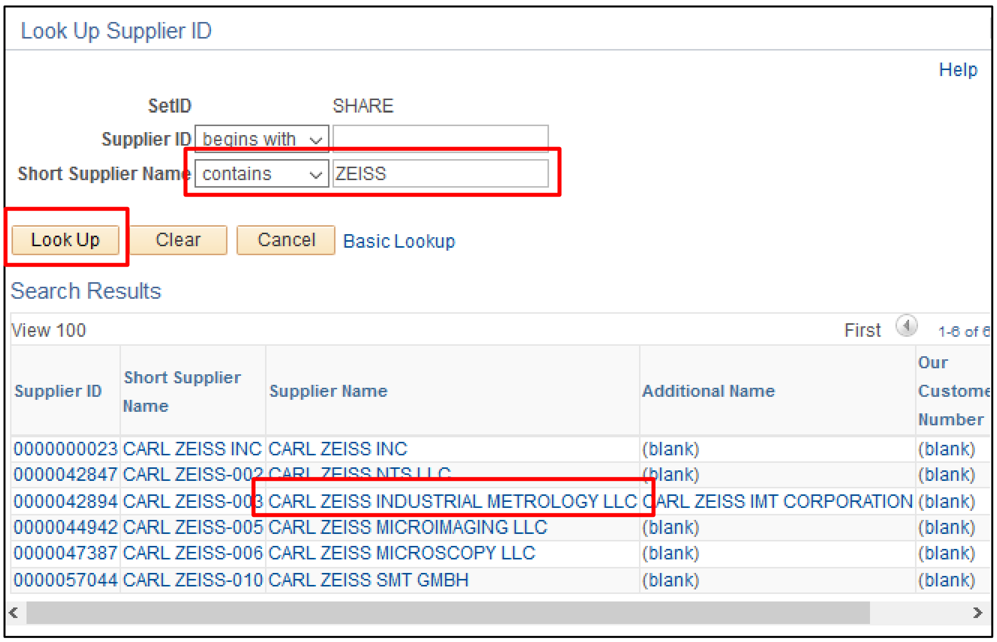
  Note: This field is limited to 254 characters.

- Enter the Quantity or the number of items you want to buy for that line.

- Select a Unit of Measure (UOM) 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 Price 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 Supplier ID 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 Supplier ID to all of the lines of the requisition, follow the instructions on **Copying Other Data to Lines** that begins on page 90.



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 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" 

button.

This adds your lines to the requisition. Use the Shopping Cart 

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" 

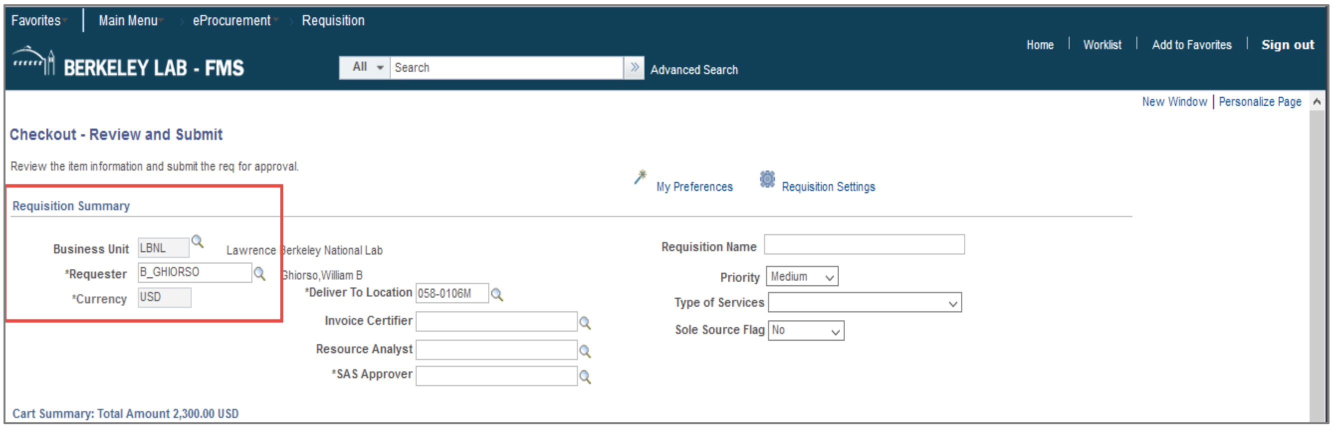
button. This takes you to the *Checkout – Review and Submit* screen.

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:

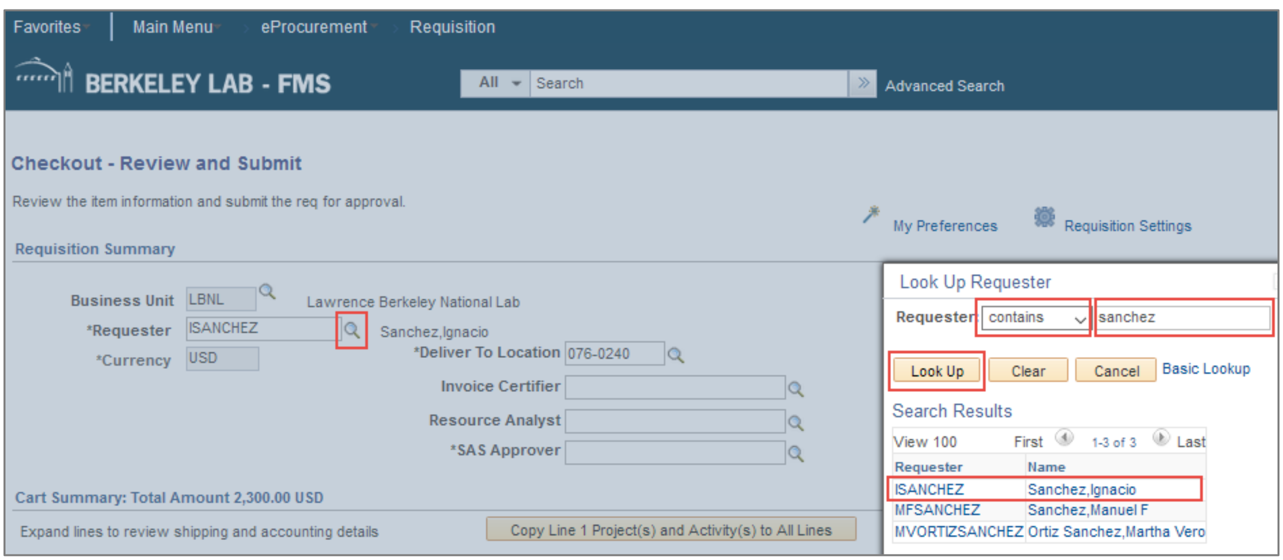
- Requisition Summary (at the top of the screen)
- Cart Summary/Requisition Lines
- Requisition Comments and Attachments / Comments to Approver

Requisition Summary



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

- Business Unit: This defaults to LBNL and cannot be changed.
- Requester: 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:



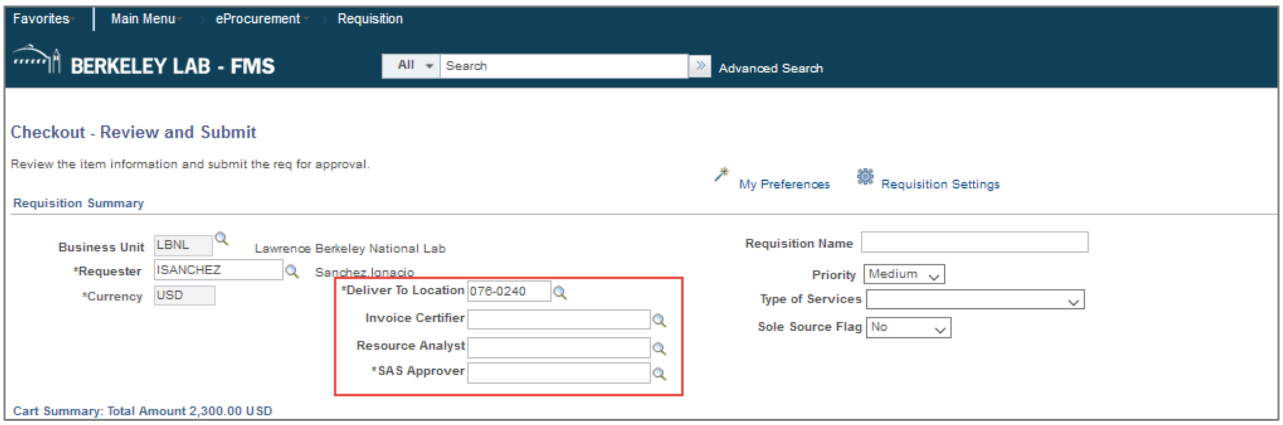
– Click the lookup icon to next to the "Requester" field. This takes you to the *Look Up Requester* screen.

– 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."

- Currency: This defaults to U.S. dollars and cannot be changed.



- Deliver To Location: 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

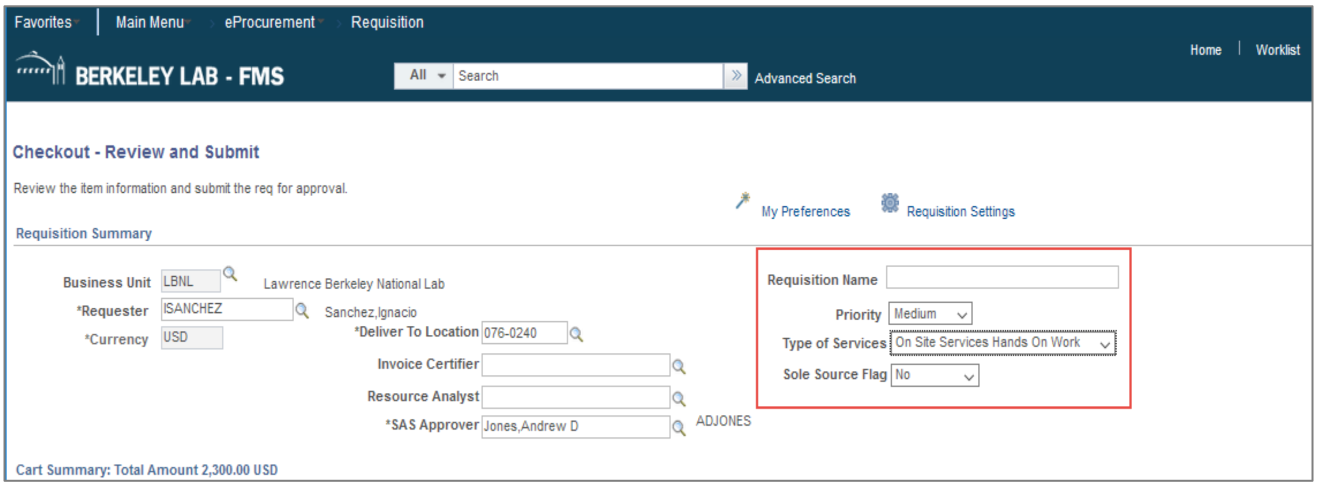
  Use the search tool to find valid Lab locations.

- Invoice Certifier: 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 *LBNL RPM section on Invoice Certifications* 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.

- Resource Analyst: 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.

- SAS Approver: 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.



- Requisition Name: 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.

- Priority: This defaults to *Medium* but can be changed to *Low* or *High* so Procurement can be informed of the urgency of the requisition.

- Type of Services: 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

- Sole Source: 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:

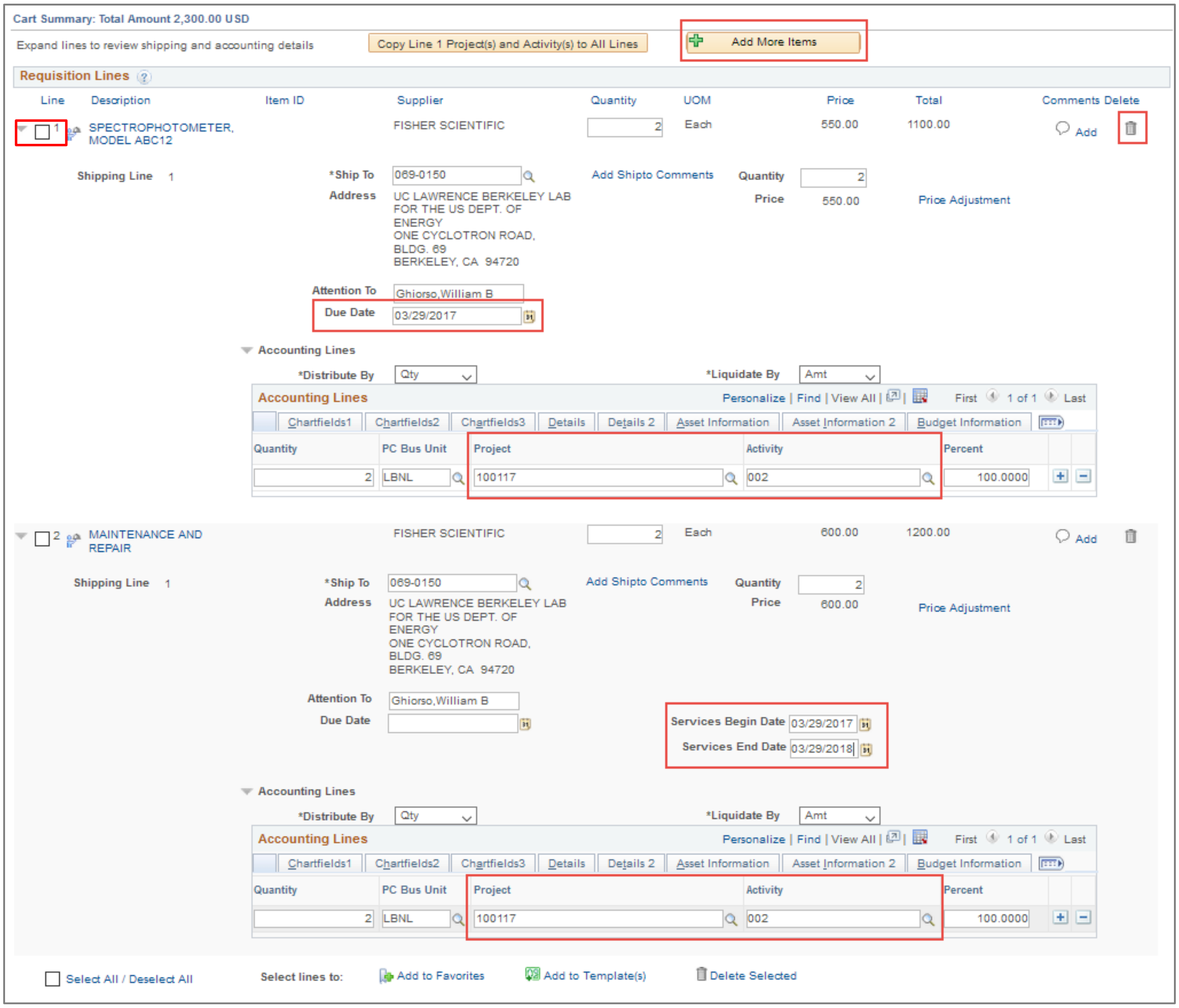
- Due Date: When the item is for goods, enter the date you would like to receive the goods. To copy the due date name to all of the lines of the requisition, follow the instructions on **Copying Other Data to Lines** that begins on page 90.
- Services Begin Date / Services End Date: When the item is for services, enter anticipated service dates in these two fields. The Due Date should be left blank when you enter Services dates.
- Project: Type in the Project that is funding the purchase. Use the lookup icon to help locate it.
- Activity: 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.

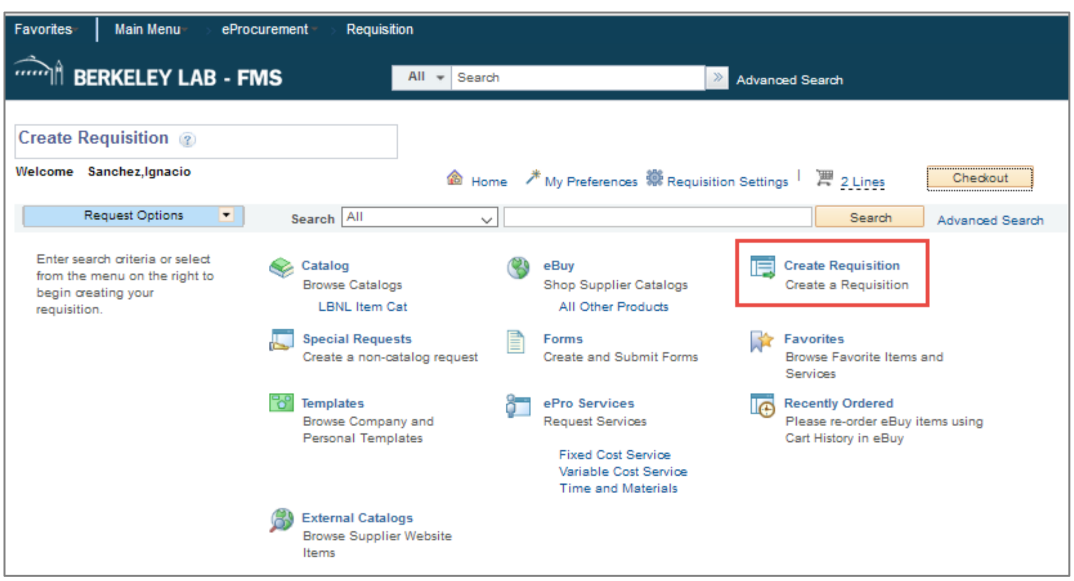
  Note: See page 85 for instructions on applying the same Project / Activity for an entire order.

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

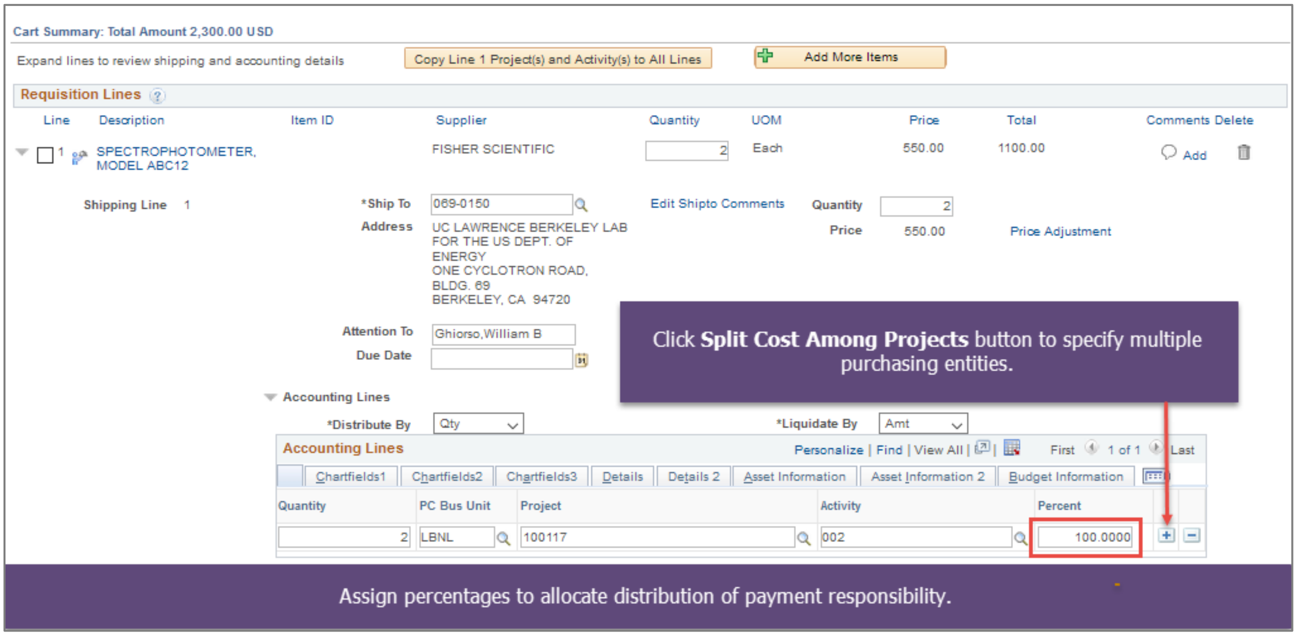
To add a new line, click on the "Add More Items" button.

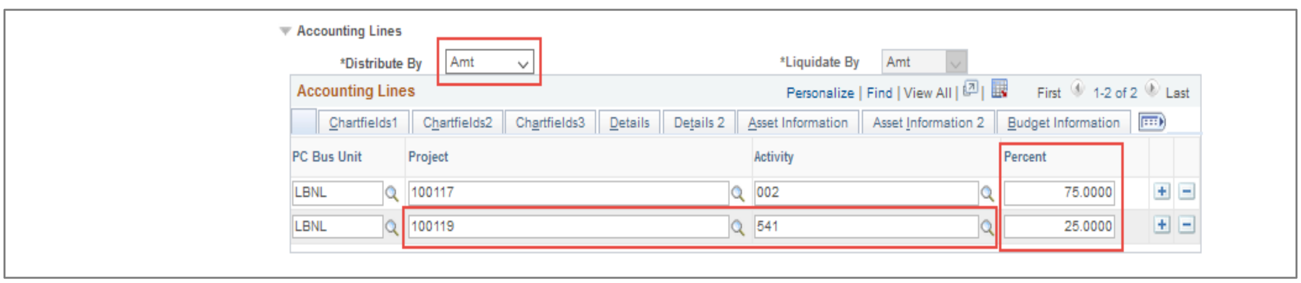
This will take you back to the main Create Requisition page where you need to click on the "Create Requisition" link and then add the lines as you did when you started the requisition.


Cart Summary: Total Amount 2,300.00 USD
Expand lines to review shipping and accounting 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
SPECTROPHOTOMETER, MODEL ABC12
FISHER SCIENTIFIC
2
Each
550.00
1100.00
Add
Shipping Line 1
*Ship To 069-0150
Add Shipto Comments
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 Ghiorso,William B
Due Date 03/29/2017
Accounting Lines
*Distribute By Qty
*Liquidate By Amt
Accounting Lines
Personalize | Find | View All
First 1 of 1 Last
Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information
Quantity PC Bus Unit Project Activity Percent
2 LBNL 100117 002 100.0000
MAINTENANCE AND REPAIR
FISHER SCIENTIFIC
2
Each
600.00
1200.00
Add
Shipping Line 1
*Ship To 069-0150
Add Shipto Comments
Quantity 2
Address UC LAWRENCE BERKELEY LAB FOR THE US DEPT. OF ENERGY ONE CYCLOTRON ROAD, BLDG. 69 BERKELEY, CA 94720
Price 600.00
Price Adjustment
Attention To Ghiorso,William B
Due Date
Services Begin Date 03/29/2017
Services End Date 03/29/2018
Accounting Lines
*Distribute By Qty
*Liquidate By Amt
Accounting Lines
Personalize | Find | View All
First 1 of 1 Last
Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information
Quantity PC Bus Unit Project Activity Percent
2 LBNL 100117 002 100.0000
Select All / Deselect All
Select lines to:
Add to Favorites
Add to Template(s)
Delete Selected


Favorites
Main Menu
eProcurement
Requisition
BERKELEY LAB - FMS
All
Search
Advanced Search
Create Requisition
Welcome Sanchez,Ignacio
Home
My Preferences
Requisition Settings
2 Lines
Checkout
Request Options
Search All
Search
Advanced Search
Enter search criteria or select from the menu on the right to begin creating your requisition.
Catalog
Browse Catalogs
LBNL Item Cat
eBuy
Shop Supplier Catalogs
All Other Products
Create Requisition
Create a Requisition
Special Requests
Create a non-catalog request
Forms
Create and Submit Forms
Favorites
Browse Favorite Items and Services
Templates
Browse Company and Personal Templates
ePro Services
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials
Recently Ordered
Please re-order eBuy items using Cart History in eBuy
External Catalogs
Browse Supplier Website Items

Splitting Projects





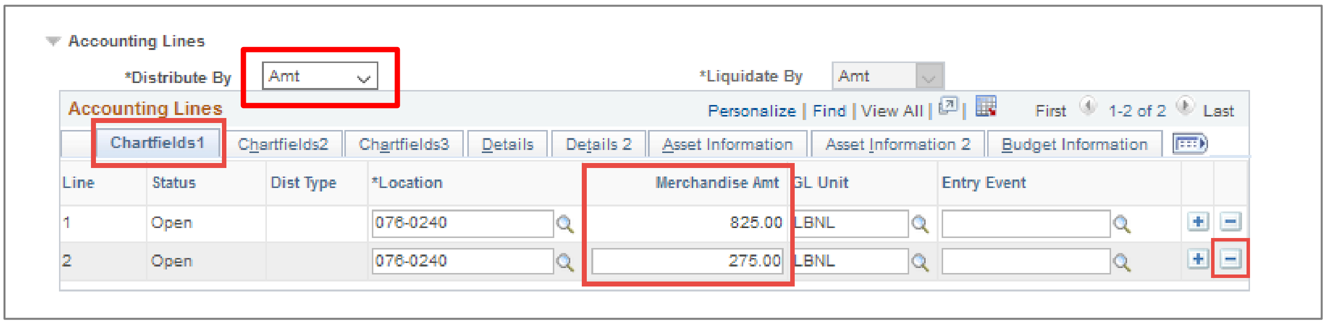
If you want to split costs among two or more Projects, do the following for each requisition line you want to split:

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.

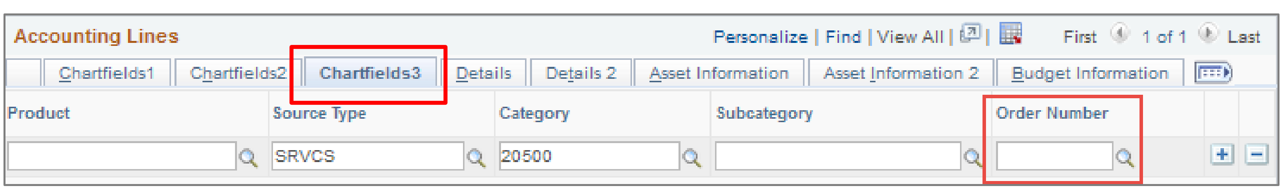
To delete an Accounting Line, click the blue minus icon on the right of the line.



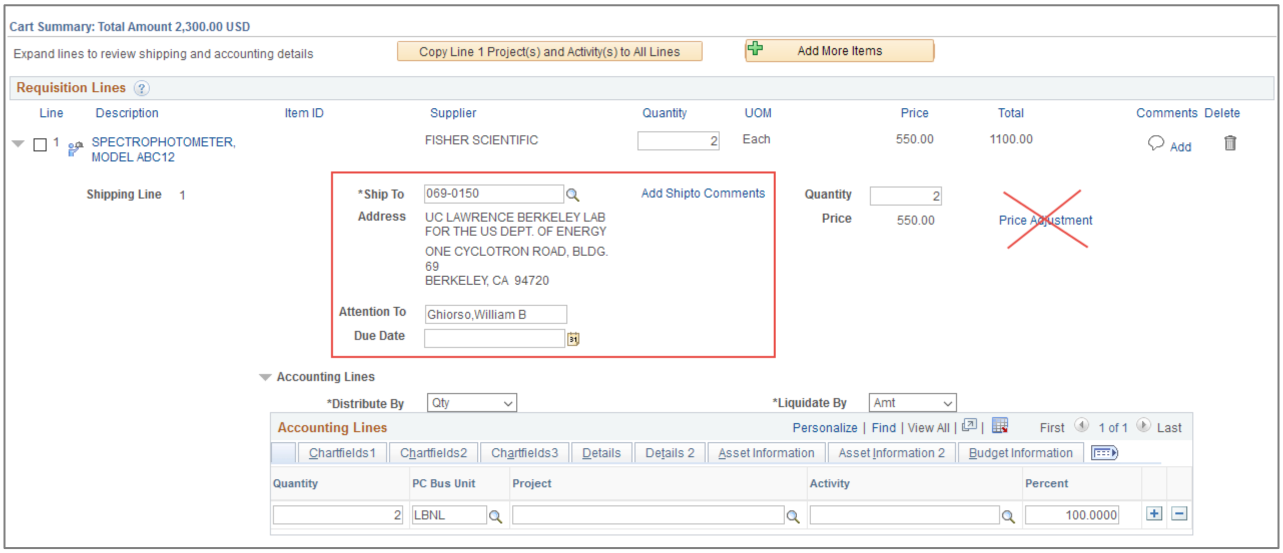
Facilities Division – Entering Maximo Work Order # and Associated Project/Activity

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.

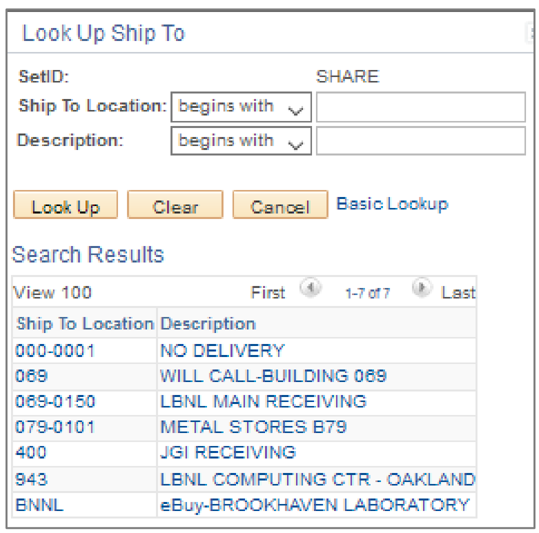


Shipping Information



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

- The Ship To 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 icon to look up the applicable Ship To address:



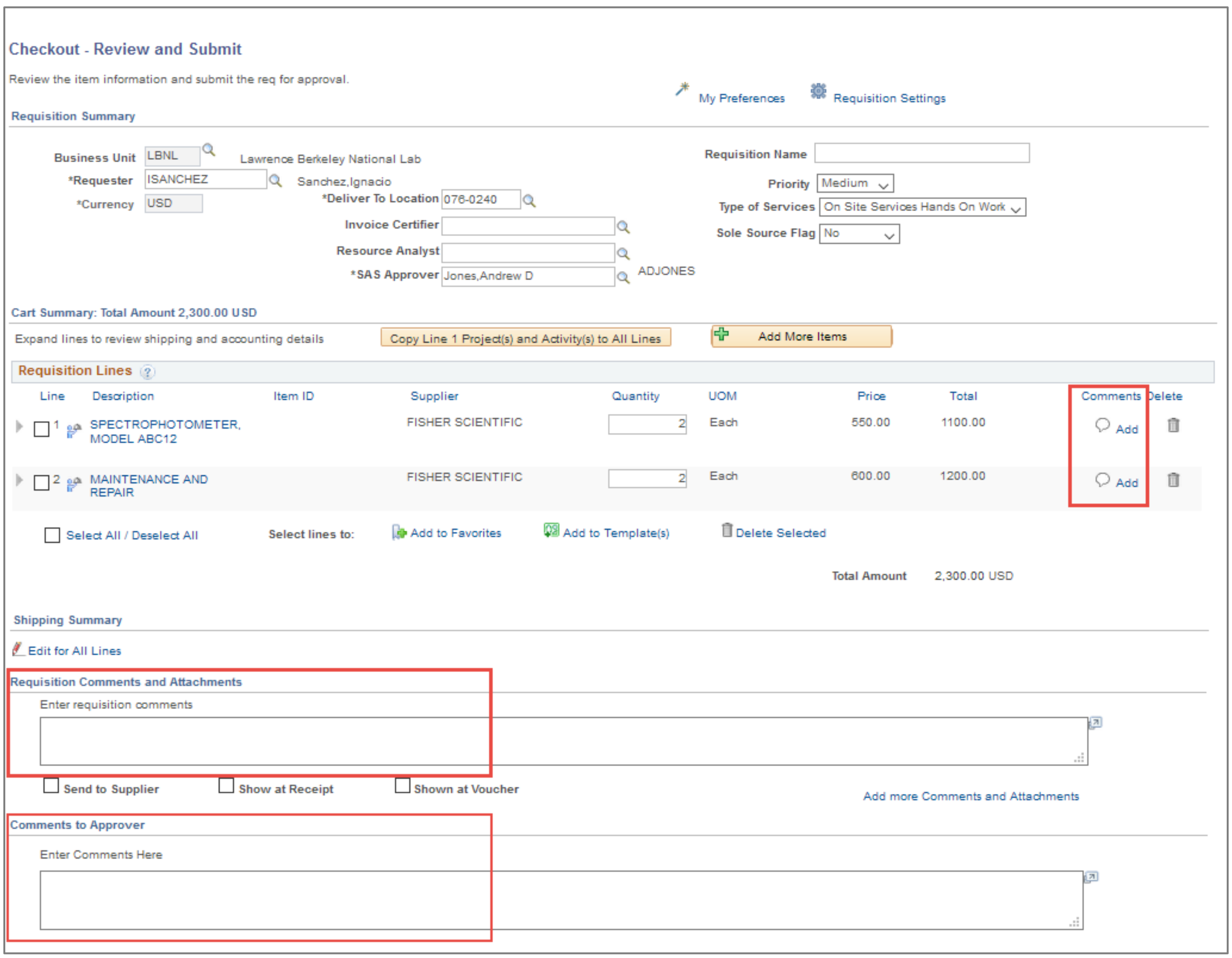
To copy the Ship to address to all of the lines of the requisition, follow the instructions on **Copying Other Data to Lines** that begins on page 90.

- The Attention To 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 Attention to name to all of the lines of the requisition, follow the instructions on **Copying Other Data to Lines** that begins on page 90.

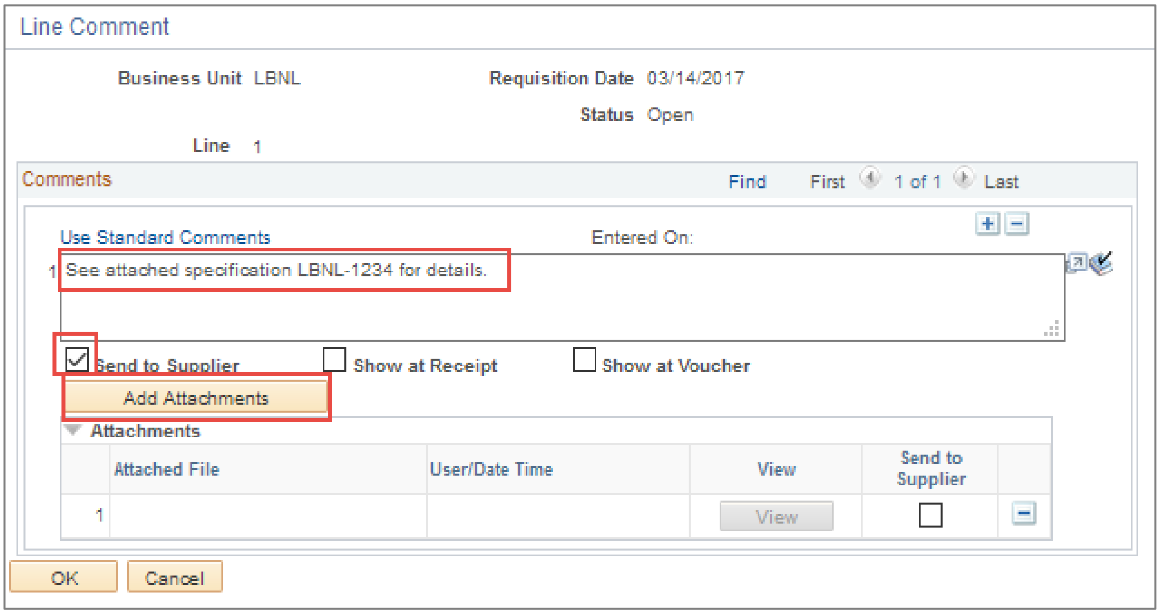
- The Add Ship To Comments link lets you add comments to your order if you want to communicate with the supplier or with the Receiving department. You can also add ship-to comments and attachments pertinent to the line by using the line's Comments icon. An example of a ship-to comment might be "Please 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 Price Adjustment link.

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 Comments 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.



After clicking 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 Requisition Comments and Attachments 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.

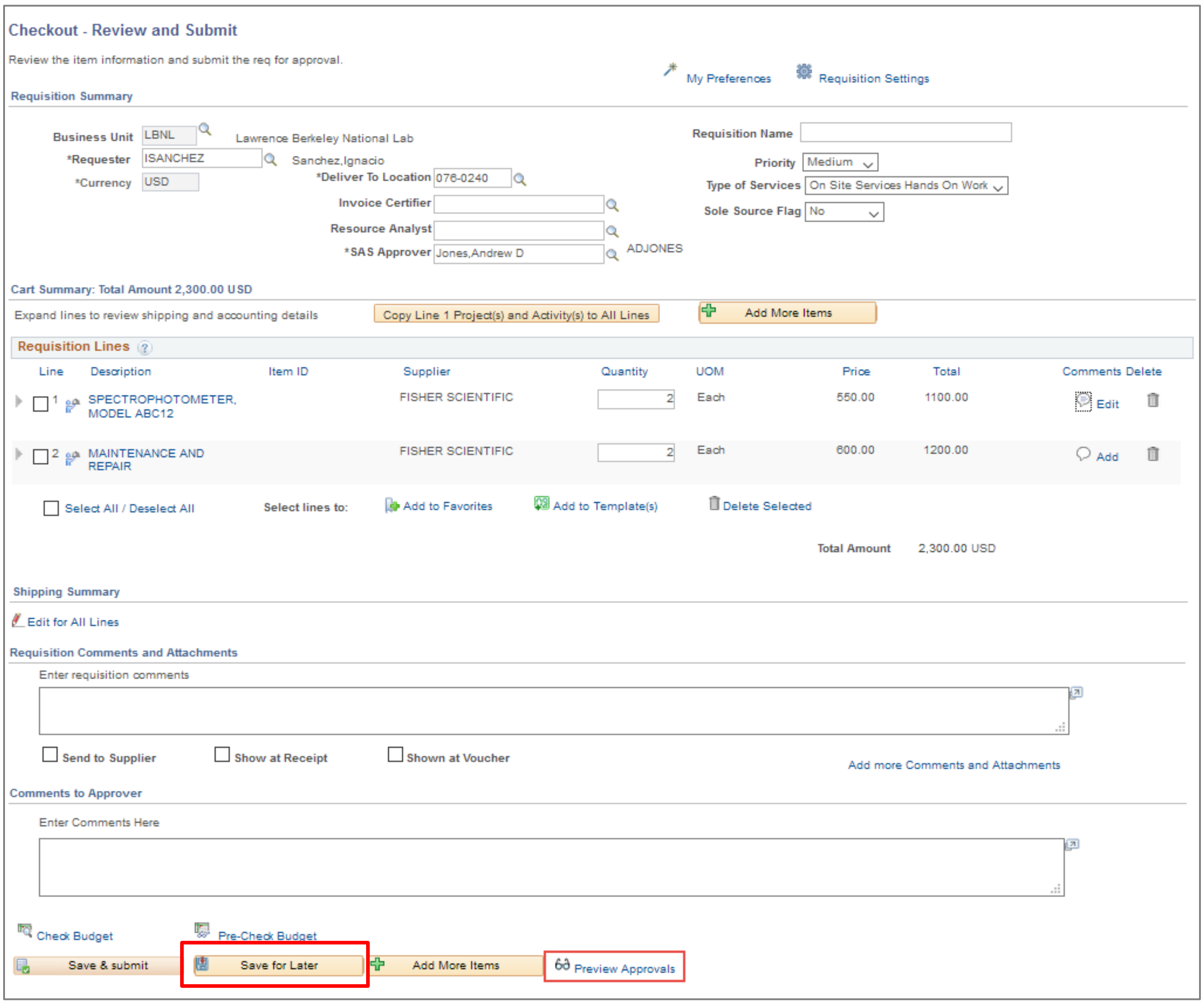
   Note: Include freight information in the Requisition Comments. Do NOT add a separate line in the requisition for freight.

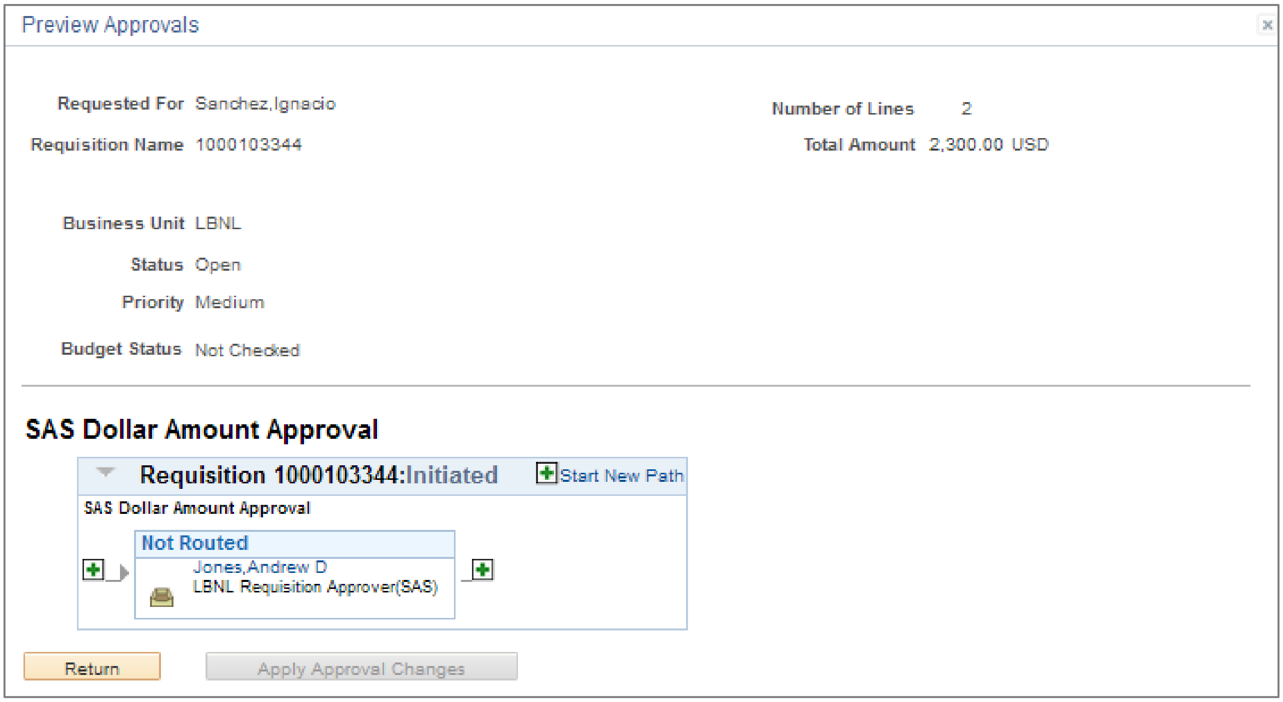
3. Comments to Approver is visible on the approver's screen and lets you communicate comments and justifications to the approver for items you will be purchasing.

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.

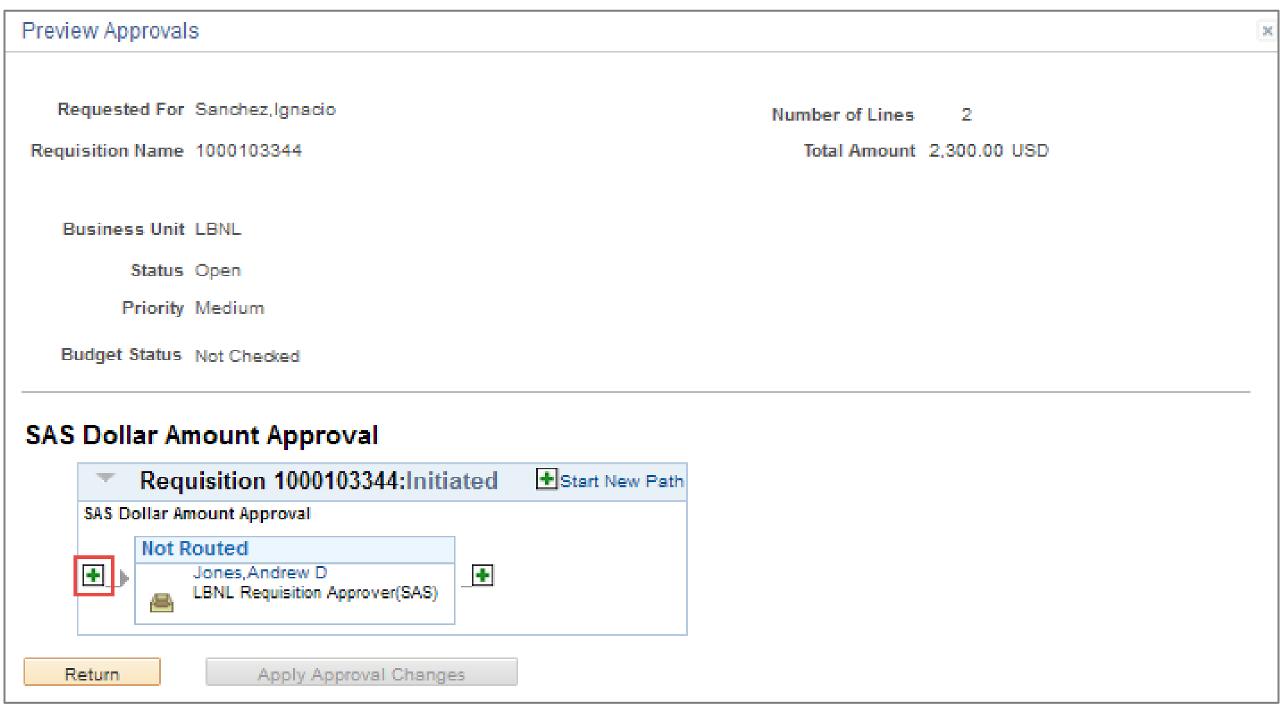




Inserting Additional Approvers or Reviewers

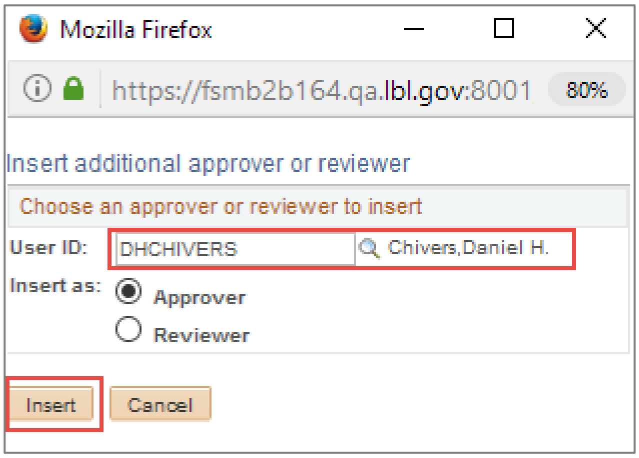
Adding an Approver or Reviewer to an Existing Path

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



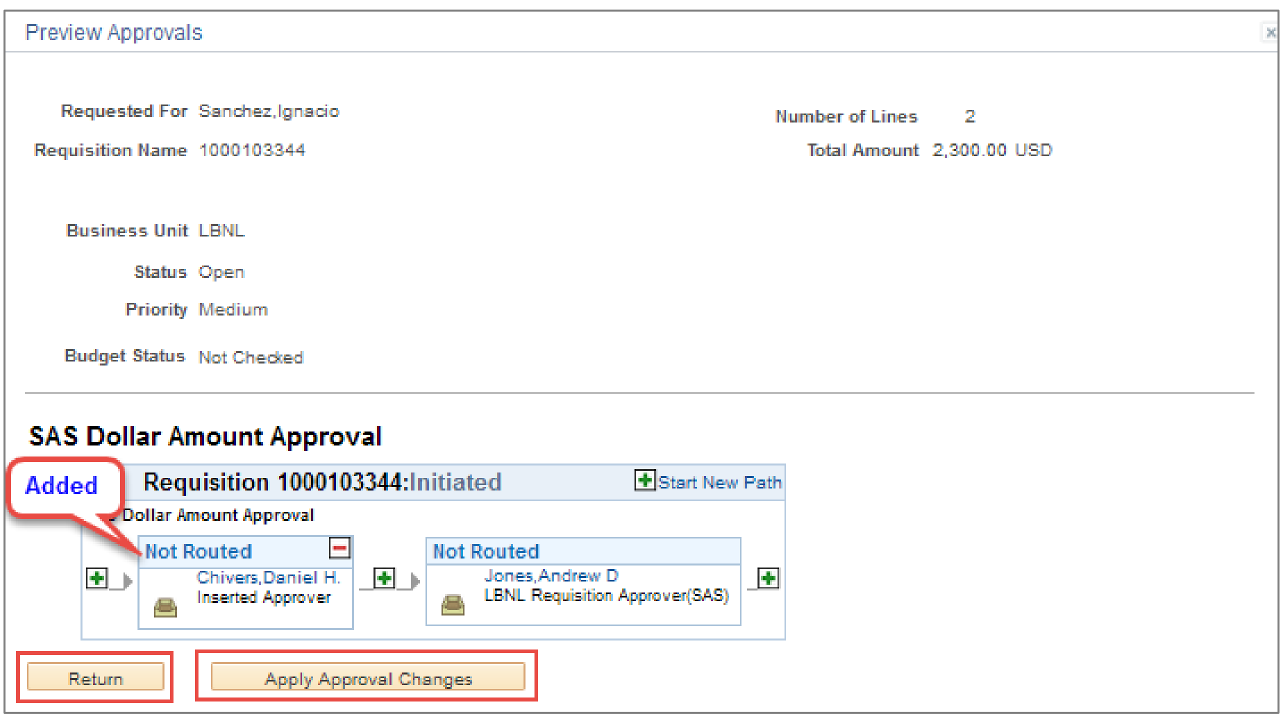
Next, select the User ID for either an approver or a reviewer using the search tool. Once the individual has been selected, use the “Insert as” buttons to indicate whether the individual will be an approver or reviewer. When finished, click “Insert.”

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

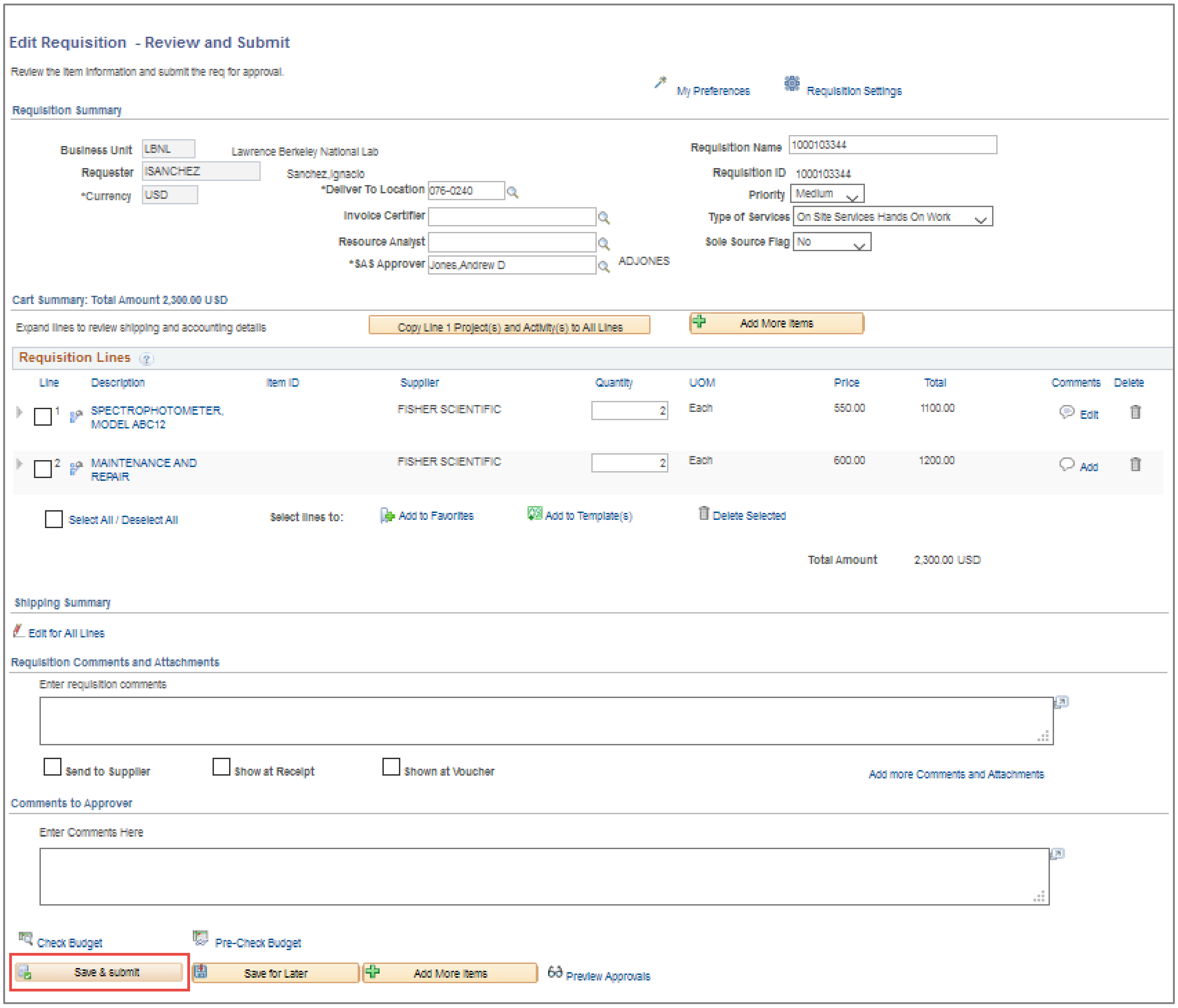


After selecting the desired reviewer or approver, click the “Apply Approval Changes” button.

Next, click the “Return” button.



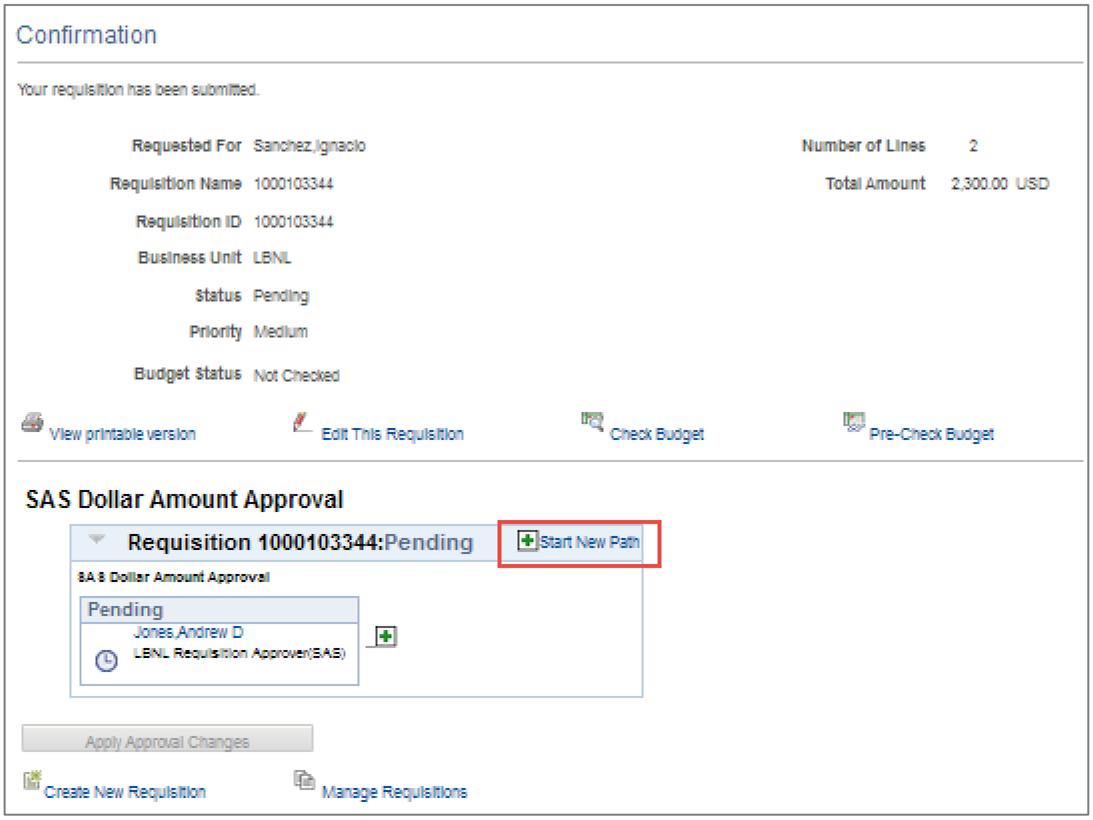
In the *Review and Submit* screen, click the “Save & submit” button.



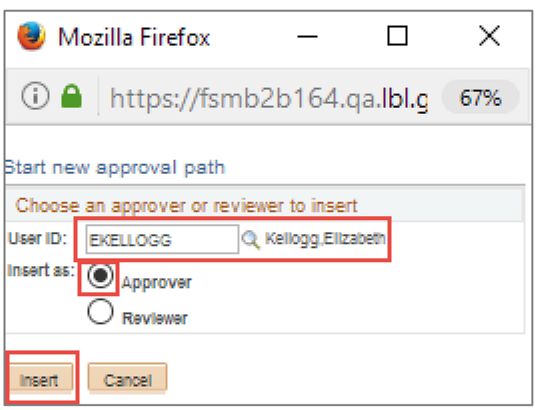
New Path

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.



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.

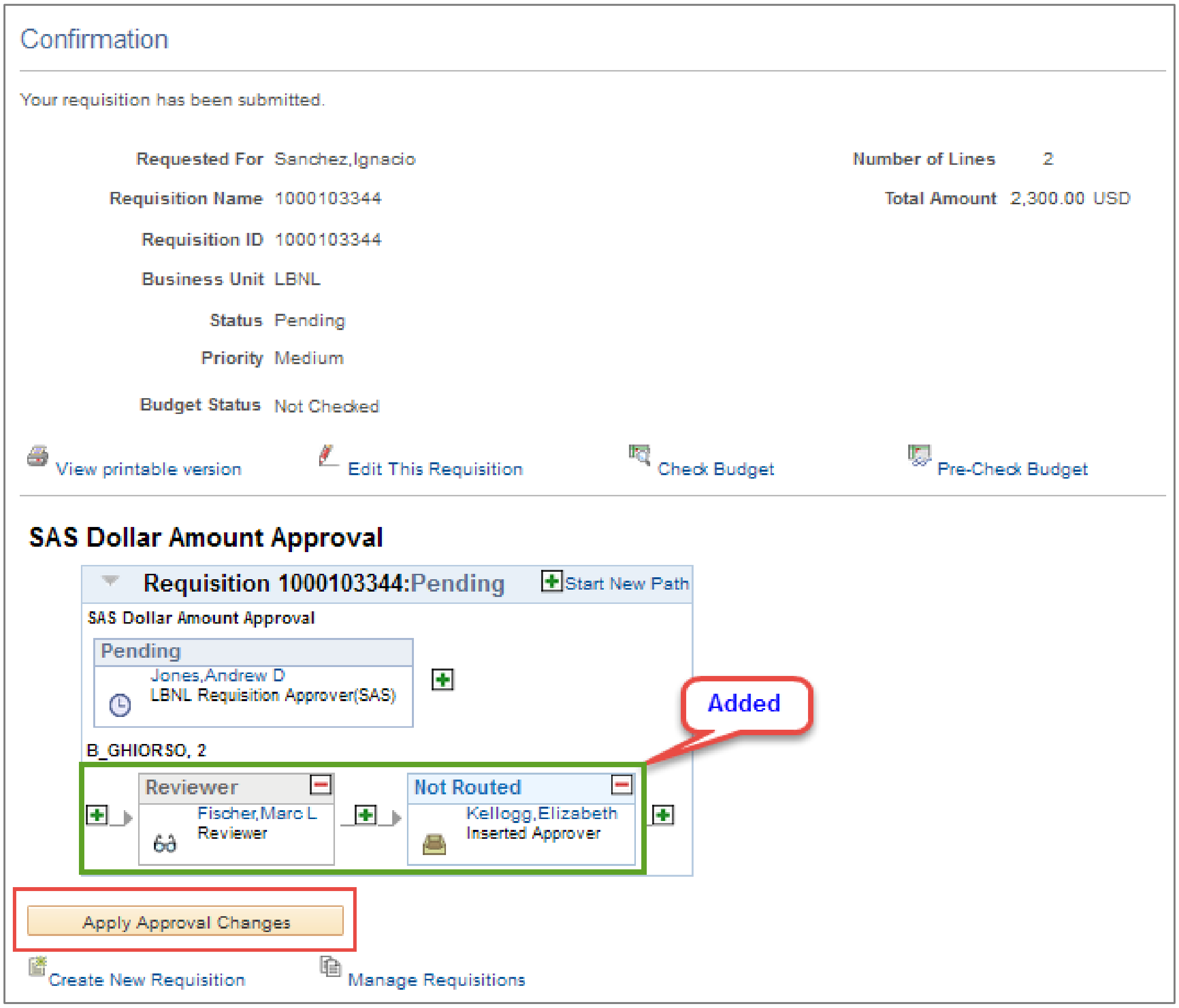


In the example below, Marc Fischer was added as a reviewer and Elizabeth Kellogg was added as an approver.

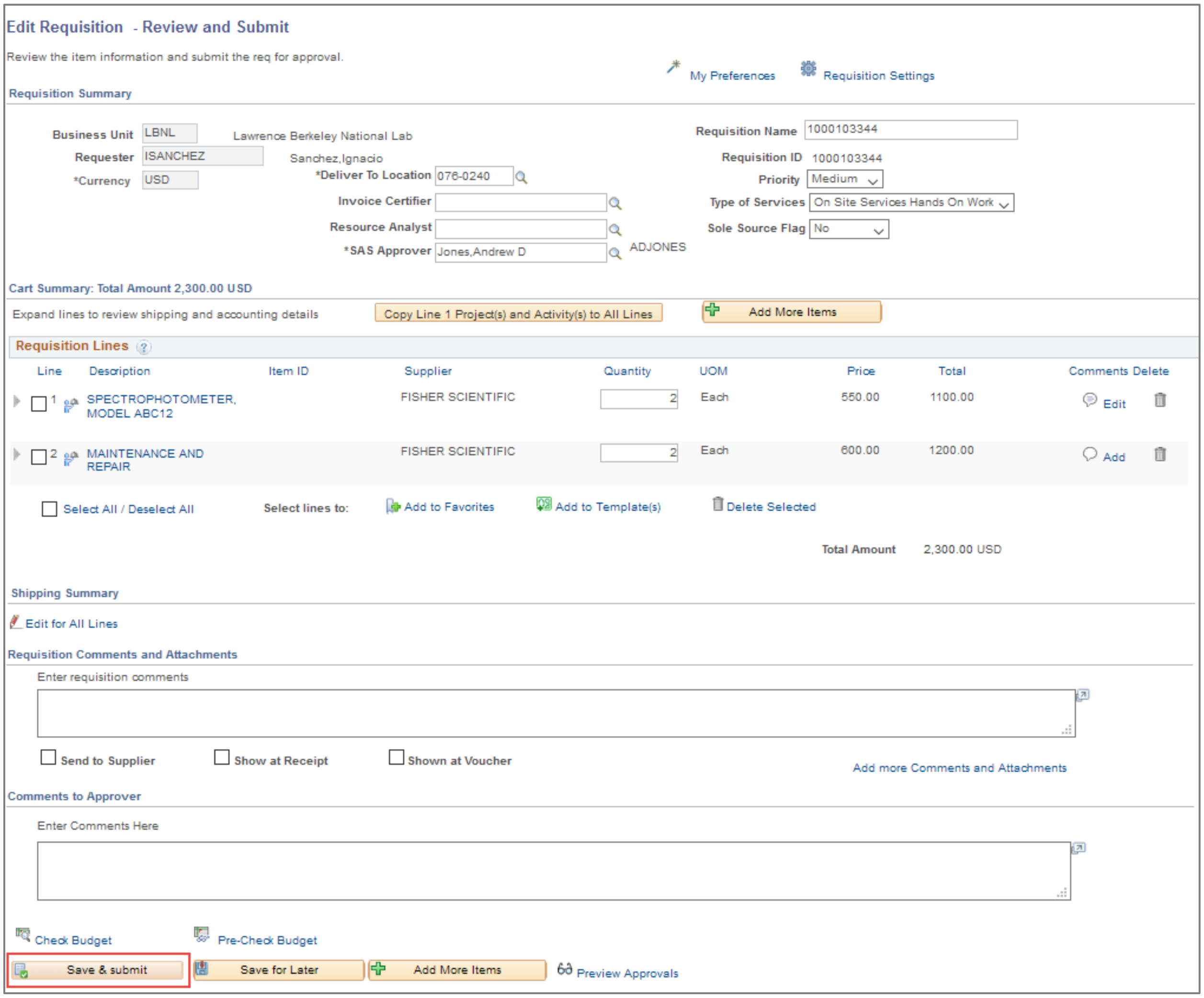
Andrew Jones will approve the requisition in parallel with Marc Fischer's/Elizabeth Kellogg's review and approval.

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

When complete, click the “Apply Approval Changes” button.



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.

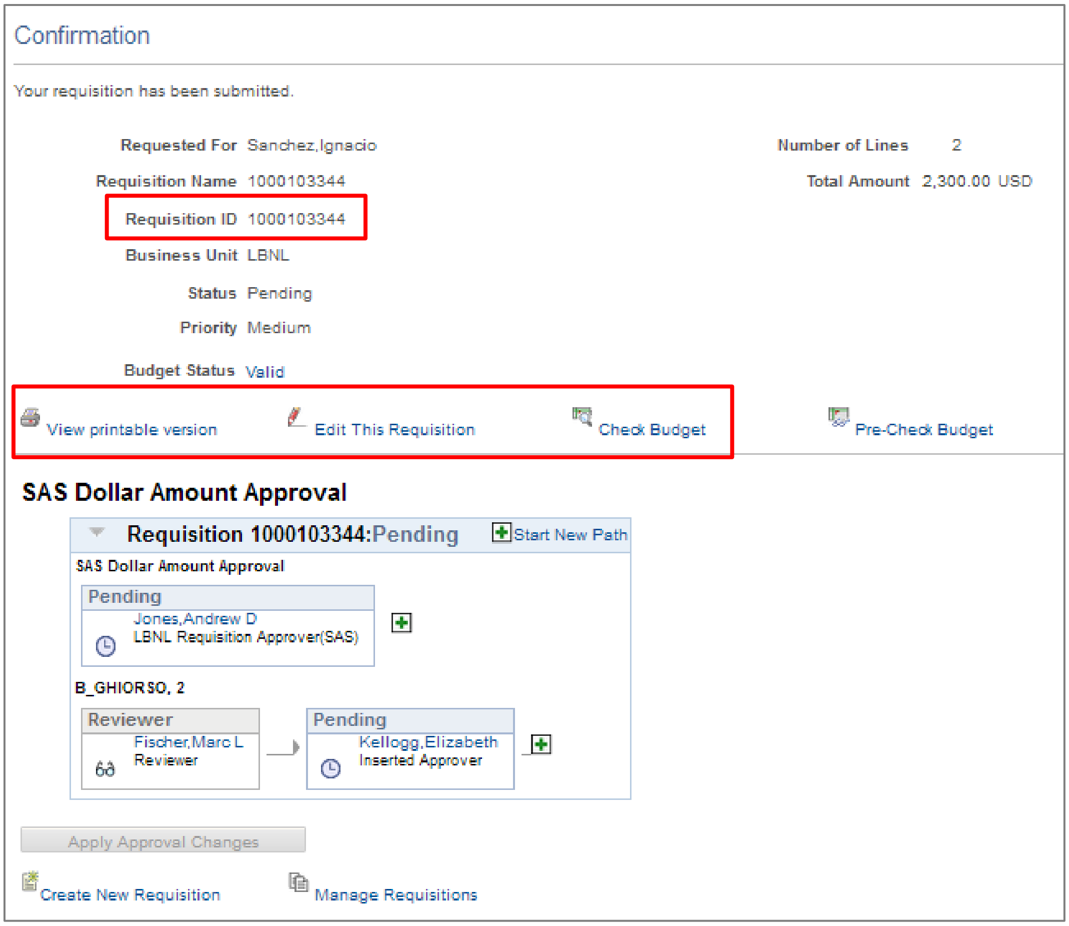
Save for Later

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.



- 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.

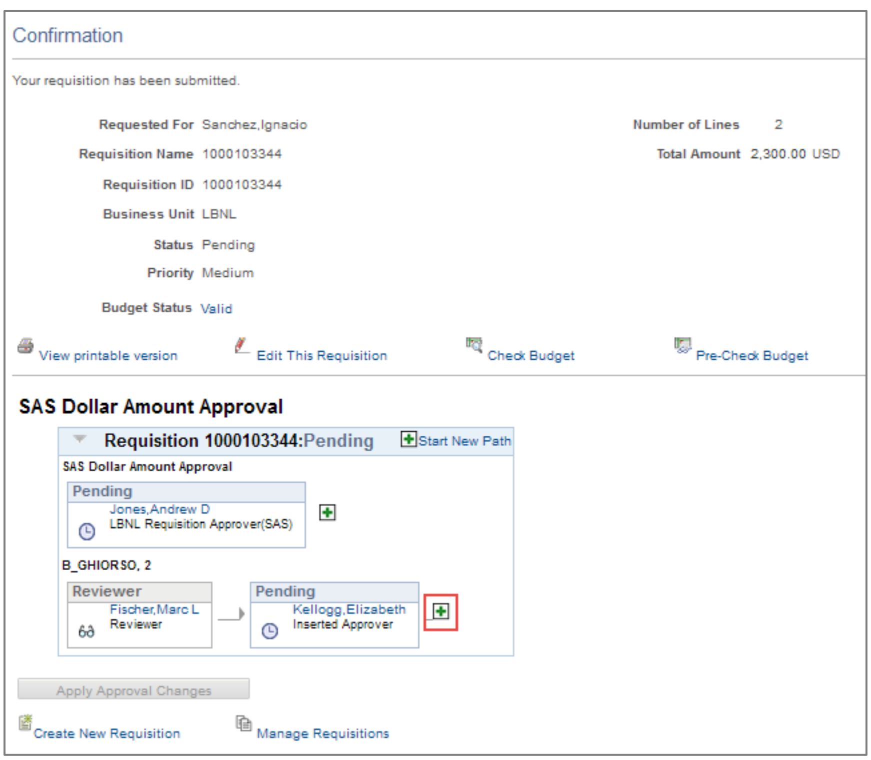
- A “Pending” status above the approver’s name means that the approver was sent an email to approve the requisition. “Not Routed” means that the approver was not yet asked to approve the requisition. After a requisition is approved, it is sent to the next approver, and the next approver’s status changes 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

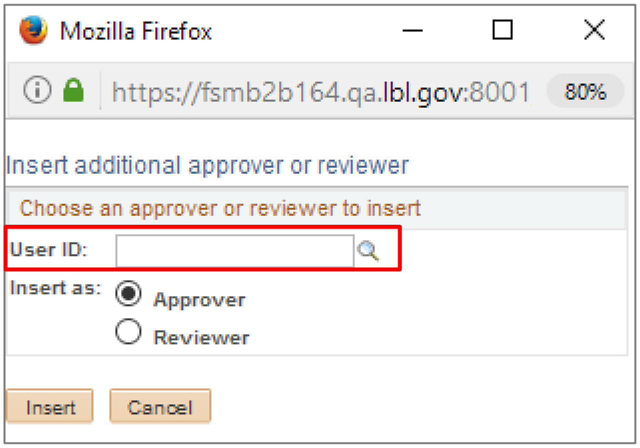
On the *Confirmation* (or *Requisition Approval*) screen, you may insert additional requisition approvers and reviewers, who may be anyone at the Lab with an email address. An inserted reviewer is sent an email with a link that lets the reviewer look at the requisition, but the requisition does not require 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:

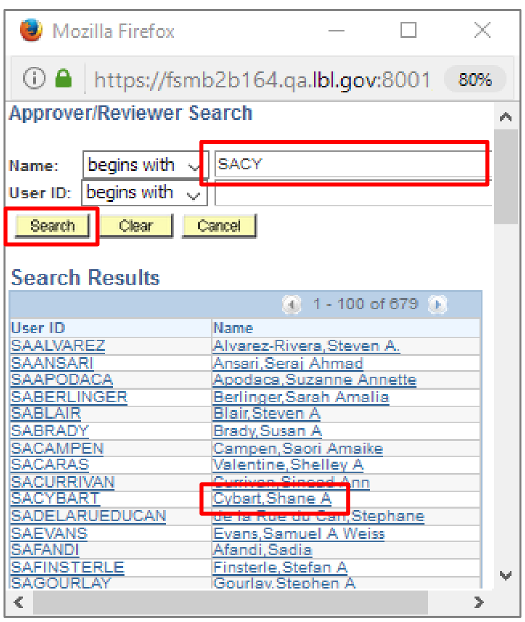
- Click the green plus icon before or after the approver already shown—depending on if you want the inserted approver/reviewer to see the requisition before or after the original approver.



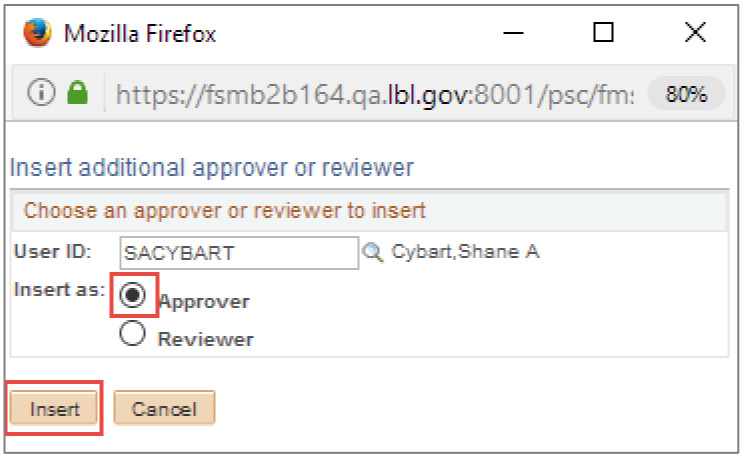
- This brings up the *Insert additional approver or reviewer* screen, where you can directly enter the inserted person's LDAP User ID.



- If you want to look up a User ID, click the search  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.

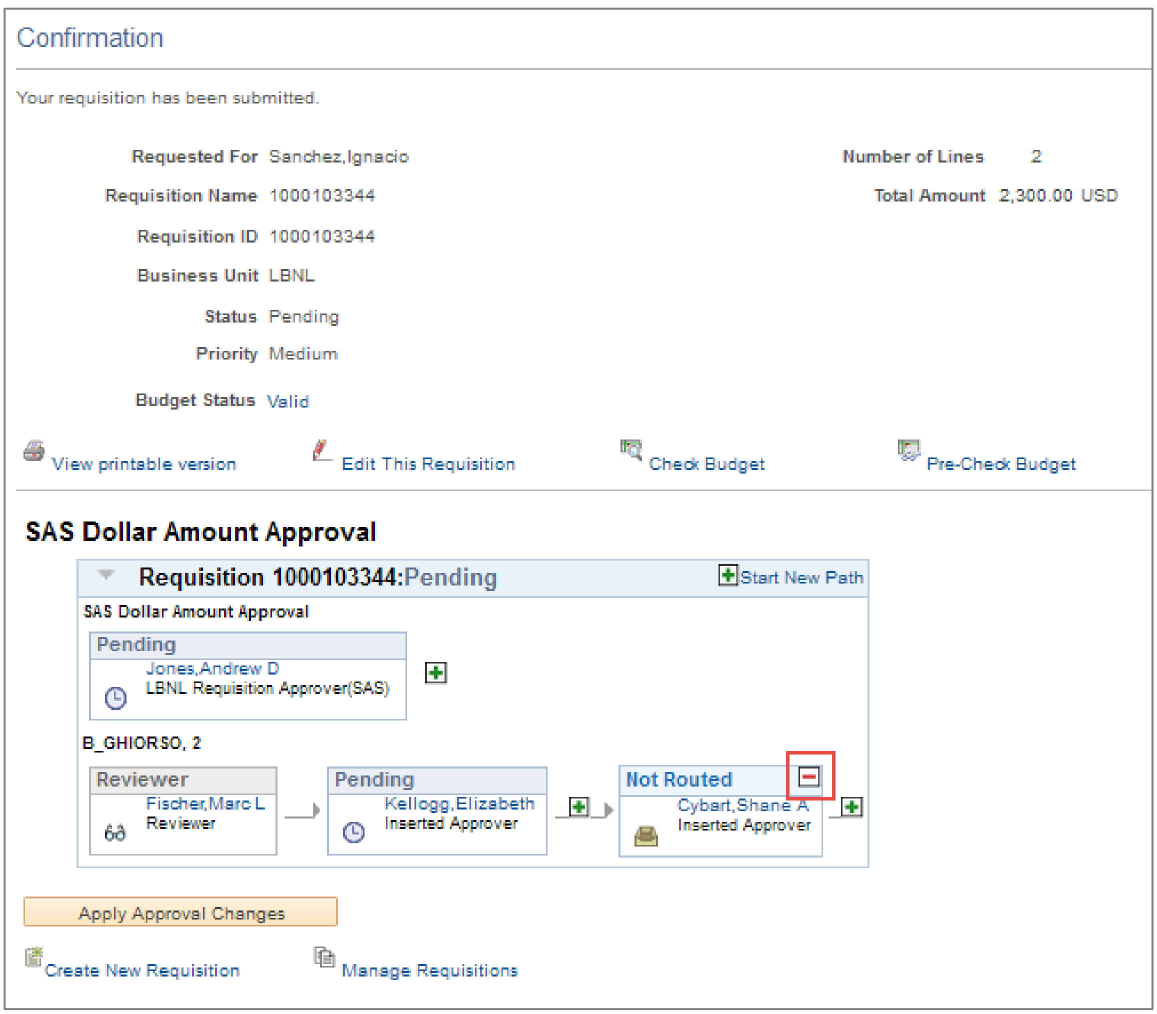


- Finally, on the original *Insert additional approver or reviewer* screen, click either the "Approver" or the "Reviewer" button, then click the "Insert" button.



To remove an approver or reviewer:

- Click the red minus icon in the box associated with that person’s name.



Consultant Services

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

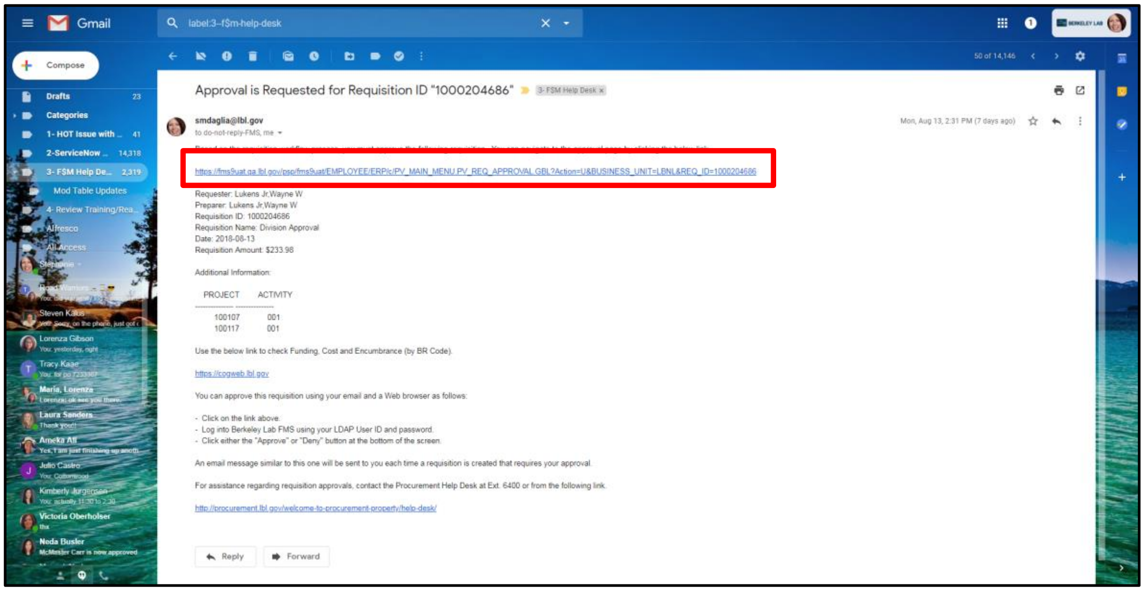
Approving ePro Requisitions

What Does It Mean to Approve a Requisition?

When an approver approves a requisition, it means:

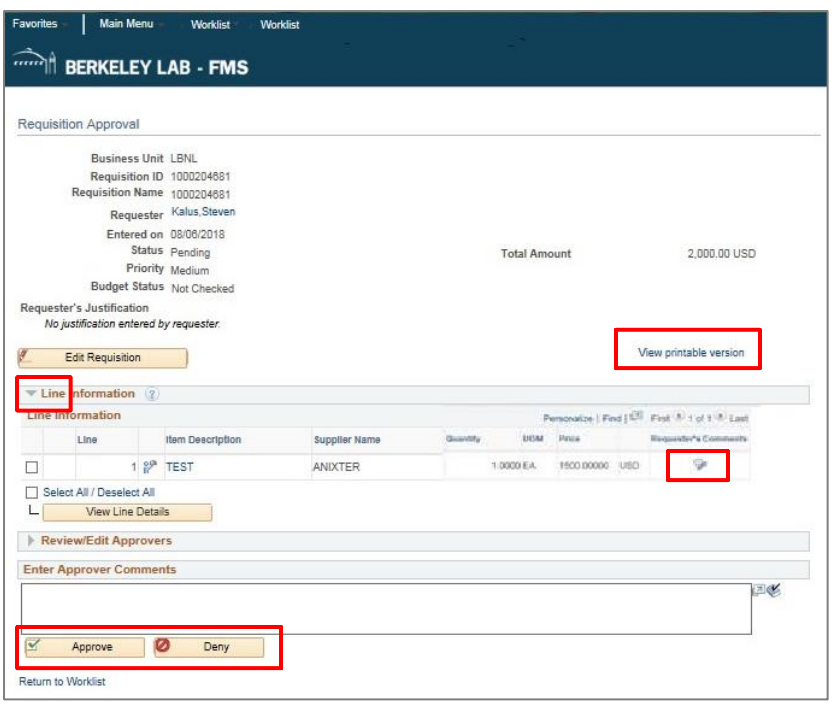
- The purchase is allowable (is a reasonable cost that a prudent individual would consider necessary and compliant with Contract 31), reasonable, and justified.
- The appropriate project is being charged.
- There are adequate funds to cover the purchase.
- Item Categories and other information on the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

Approval Emails



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



- 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.

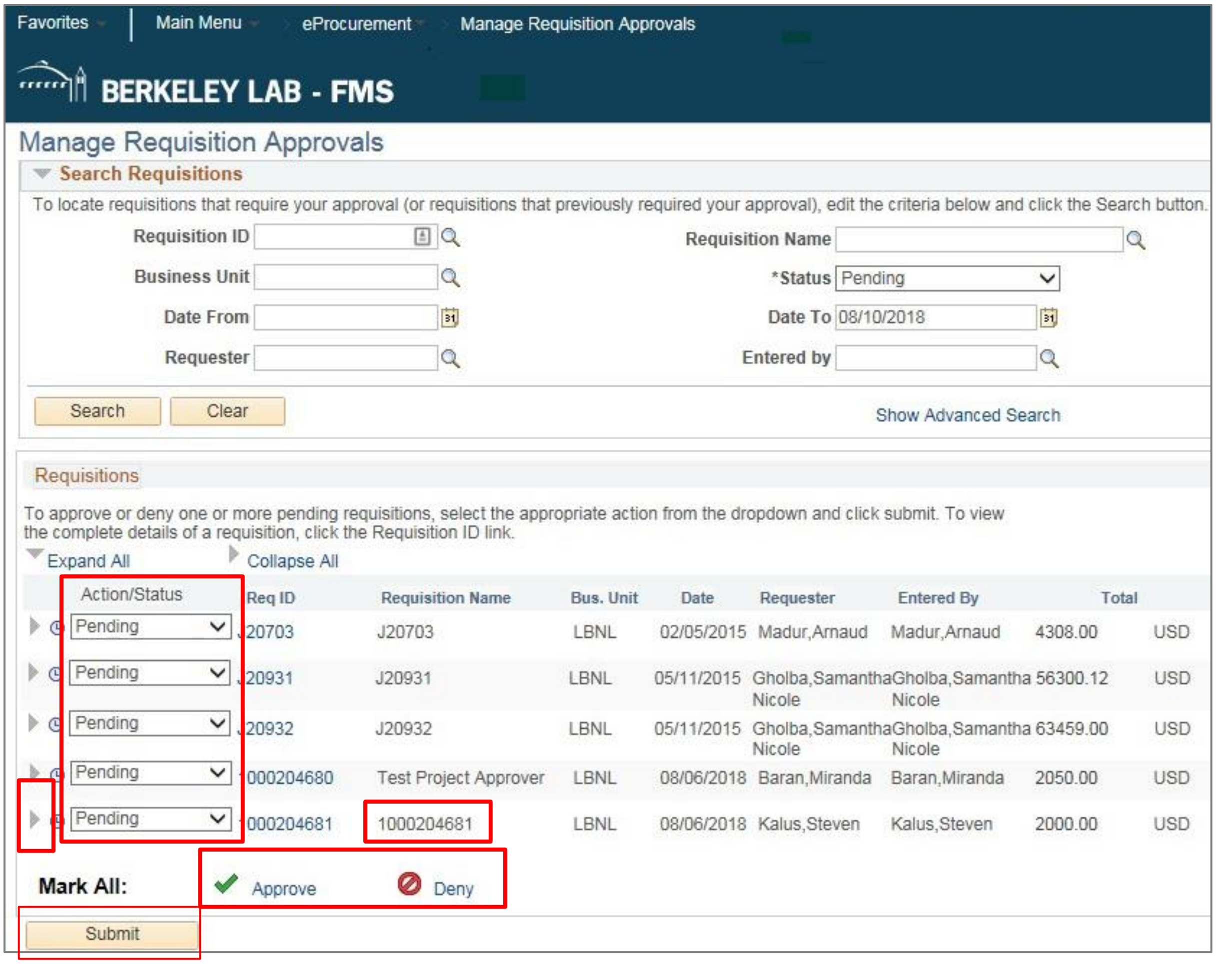
- Clicking the Expand/Collapse arrow icon on the left side of the “Review/Edit Approvers” bar will display all requisition approvers and the approval status of the requisition.
- Approvers can insert additional approvers or reviewers by clicking on the Edit Requisition button and then follow the instructions 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:

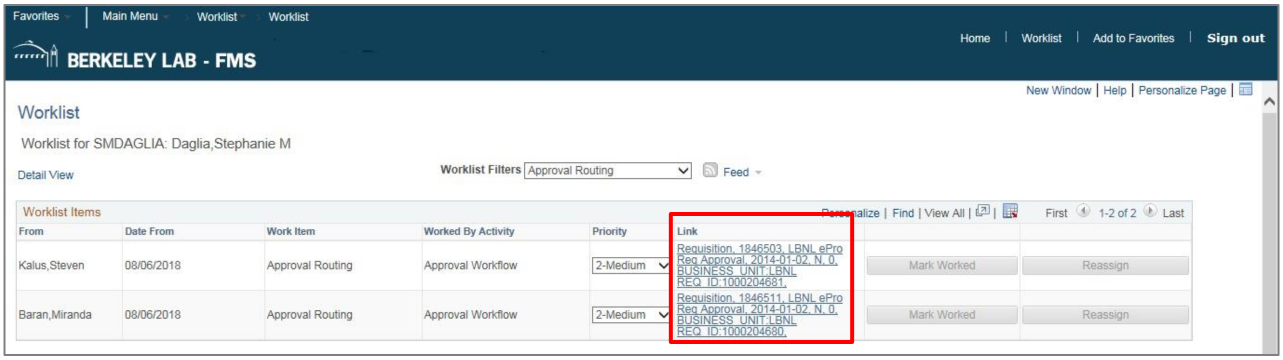
1. Navigating to the **eProcurement | Manage Requisition Approvals** screen allows the approver see all requisitions requiring their approval.



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.

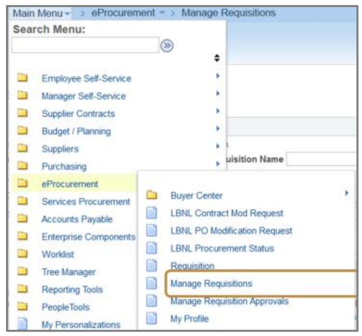

Favorites
Main Menu
Worklist
Worklist
BERKELEY LAB - FMS
Home
Worklist
Add to Favorites
Sign out
New Window | Help | Personalize Page
Worklist
Worklist for SMDAGLIA: Daglia,Stephanie M
Detail View
Worklist Filters Approval Routing
Feed
Worklist Items
Personalize | Find | View All
First 1-2 of 2 Last
From
Date From
Work Item
Worked By Activity
Priority
Link
Kalus,Steven
08/06/2018
Approval Routing
Approval Workflow
2-Medium
Requisition, 1846503, LBNL ePro Req Approval, 2014-01-02, N, 0, BUSINESS_UNIT:LBNL REQ_ID:1000204681,
Mark Worked
Reassign
Baran,Miranda
08/06/2018
Approval Routing
Approval Workflow
2-Medium
Requisition, 1846511, LBNL ePro Req Approval, 2014-01-02, N, 0, BUSINESS_UNIT:LBNL REQ_ID:1000204680,
Mark Worked
Reassign

Check Requisition/Order Status

Manage Requisitions Screen

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

Main Menu | eProcurement | Manage Requisitions

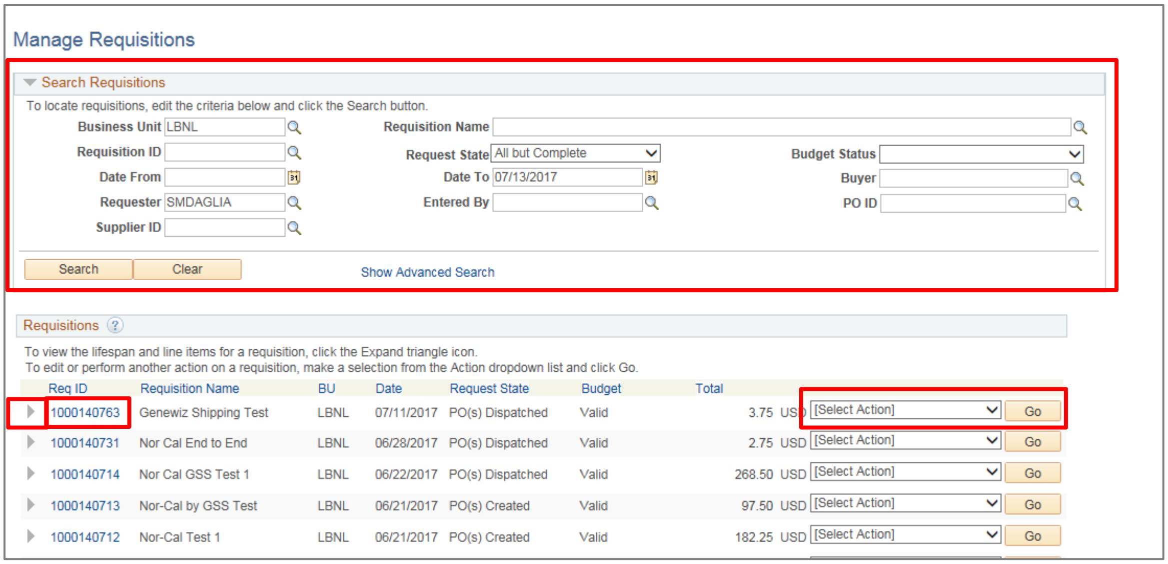


On the *Manage Requisitions* screen, search for the requisition you want to see by typing in the relevant information in the Search Requisition area of the screen. Enter parameters like requester User ID, requisition preparer User ID, or requisition ID to match what you are trying to find. You may also 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.

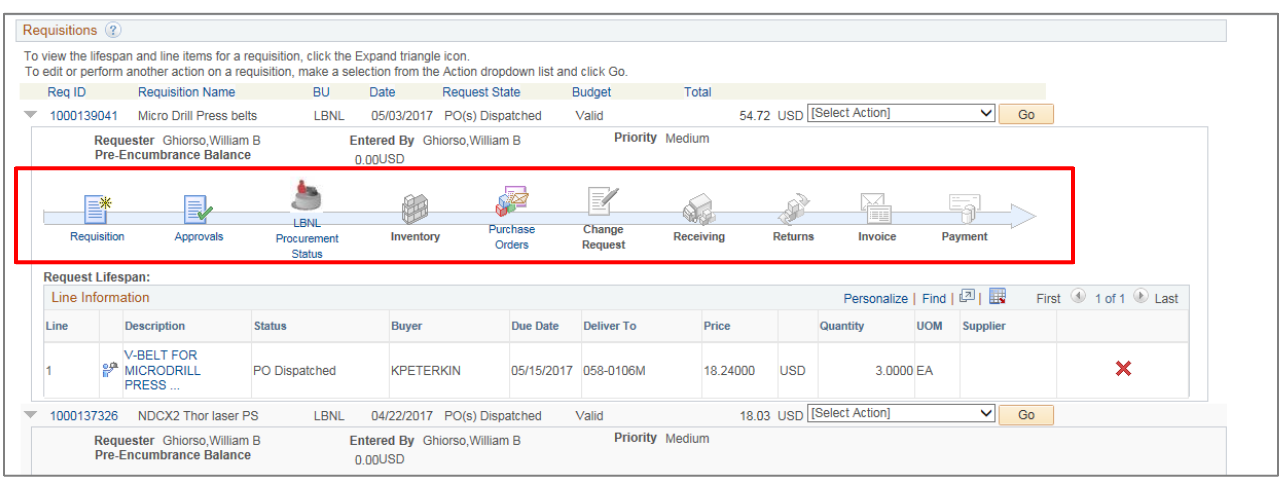
Note: The list of requisitions will contain up to 100 requisition lines; not requisitions (i.e., one requisition with 100 lines would show only one requisition). If more lines need to be viewed, it is recommended that you narrow the search parameters.



- 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.



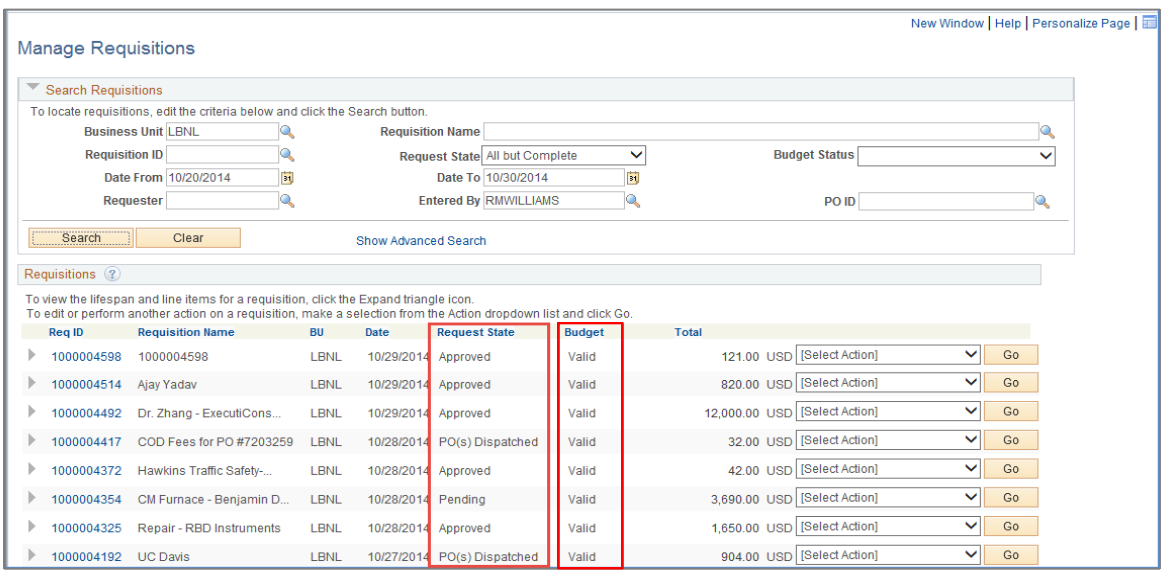
- Requisition: Requisition detail
- Approvals: Requisition Approval status
- LBNL Procurement Status: Purchase Order Procurement status
- Inventory: Inventory List (not used)
- Purchase Orders: Purchase Order details
- Change Request: PO Modification Request (not used)
- Receiving: Receiving status
- Returns: Returns status
- Invoice: Invoice records
- Payment: 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 Window | Help | Personalize Page

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit LBNL | Requisition Name
Requisition ID | Request State All but Complete | Budget Status
Date From 10/20/2014 | Date To 10/30/2014
Requester | Entered By RMWILLIAMS | PO ID

Search | Clear | Show Advanced Search

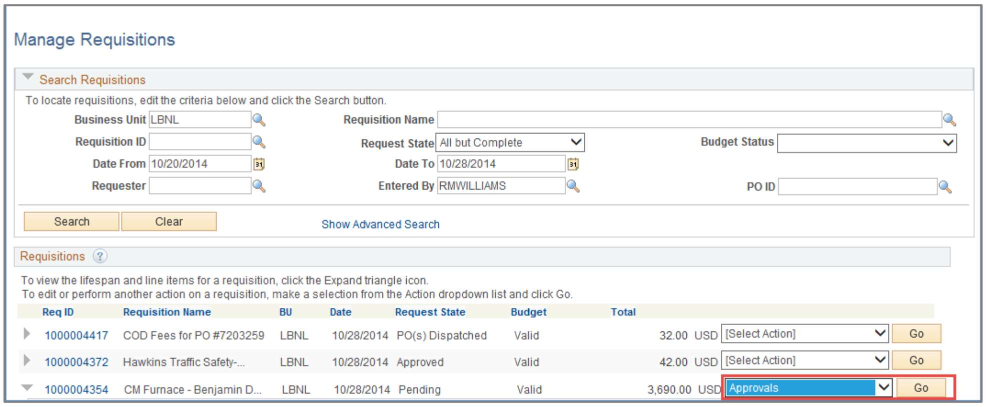
Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

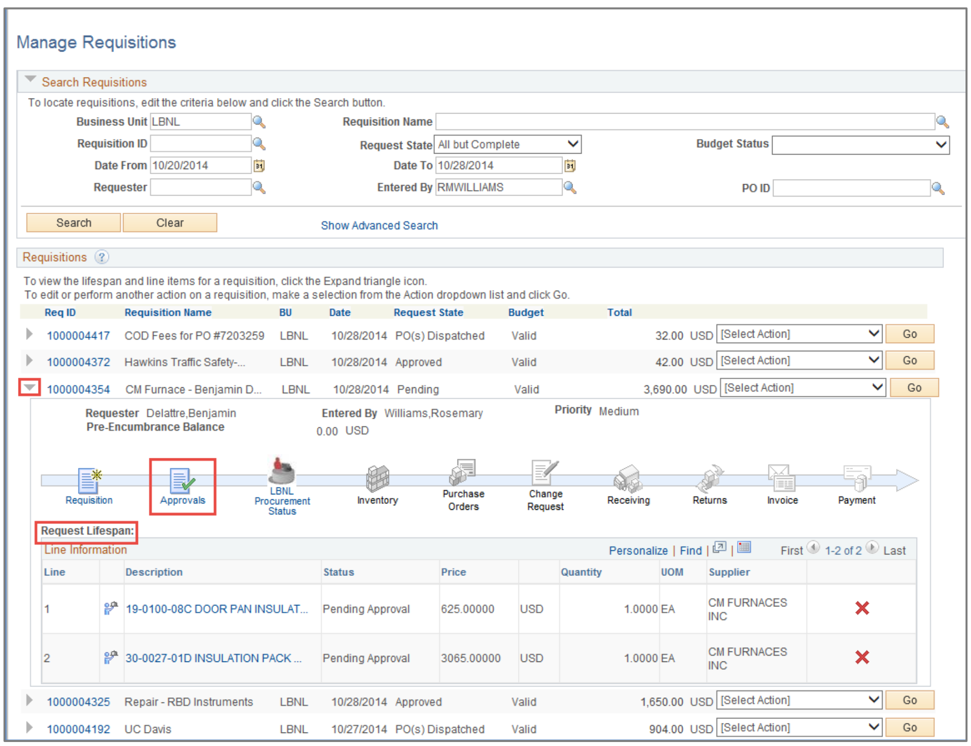
Req ID	Requisition Name	BU	Date	Request State	Budget	Total			
1000004598	1000004598	LBNL	10/29/2014	Approved	Valid	121.00	USD	[Select Action]	Go
1000004514	Ajay Yadav	LBNL	10/29/2014	Approved	Valid	820.00	USD	[Select Action]	Go
1000004492	Dr. Zhang - ExecutiCons...	LBNL	10/29/2014	Approved	Valid	12,000.00	USD	[Select Action]	Go
1000004417	COD Fees for PO #7203259	LBNL	10/28/2014	PO(s) Dispatched	Valid	32.00	USD	[Select Action]	Go
1000004372	Hawkins Traffic Safety-...	LBNL	10/28/2014	Approved	Valid	42.00	USD	[Select Action]	Go
1000004354	CM Furnace - Benjamin D...	LBNL	10/28/2014	Pending	Valid	3,690.00	USD	[Select Action]	Go
1000004325	Repair - RBD Instruments	LBNL	10/28/2014	Approved	Valid	1,650.00	USD	[Select Action]	Go
1000004192	UC Davis	LBNL	10/27/2014	PO(s) Dispatched	Valid	904.00	USD	[Select Action]	Go

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

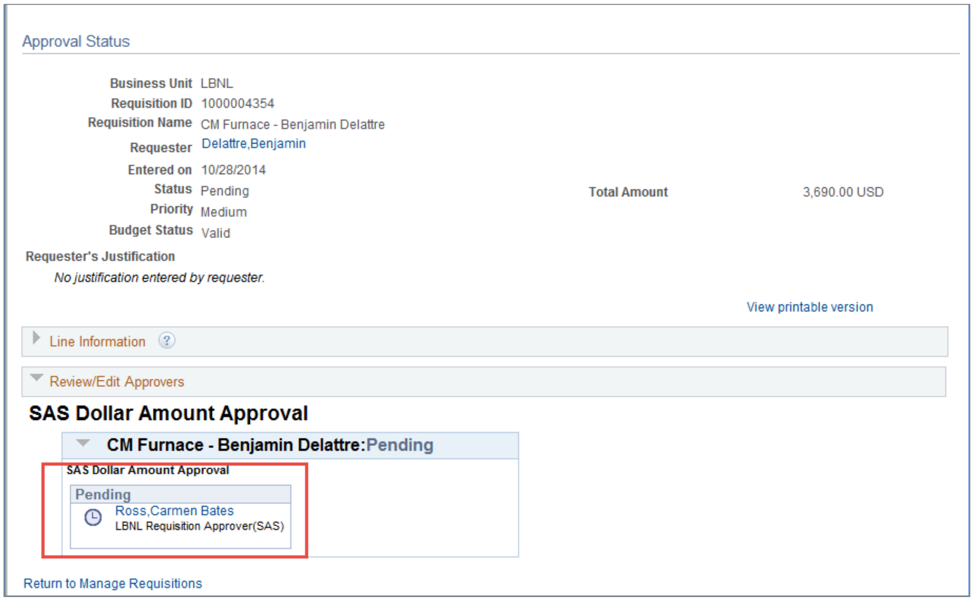
1. Change the [Select Action] to “Approvals” and click the “Go” button.



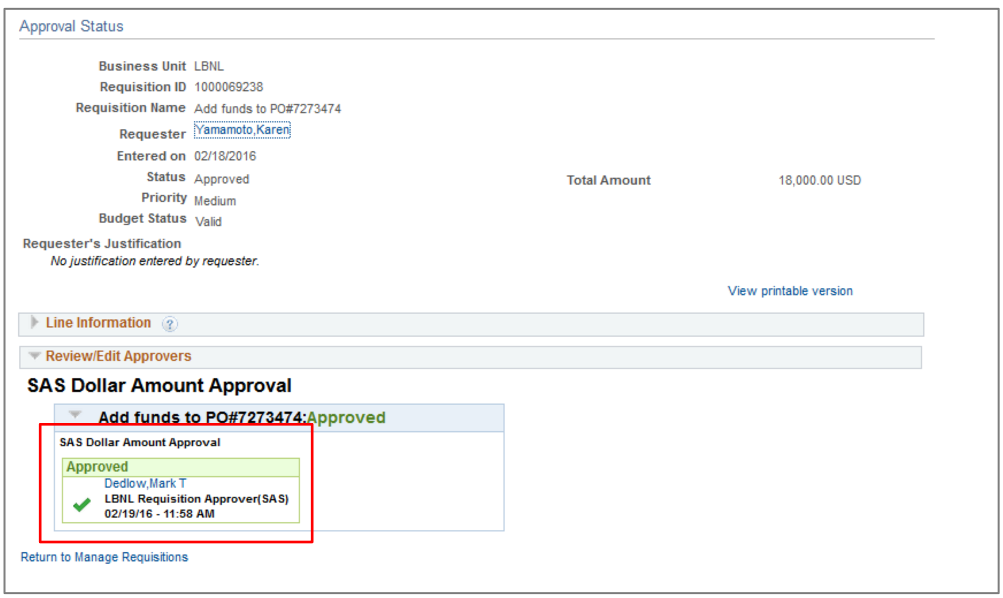
2. Alternately, click the “Expand Section” arrow to the left of the “Req ID” to reveal the Request Lifespan section, and then click the “Approvals” icon.



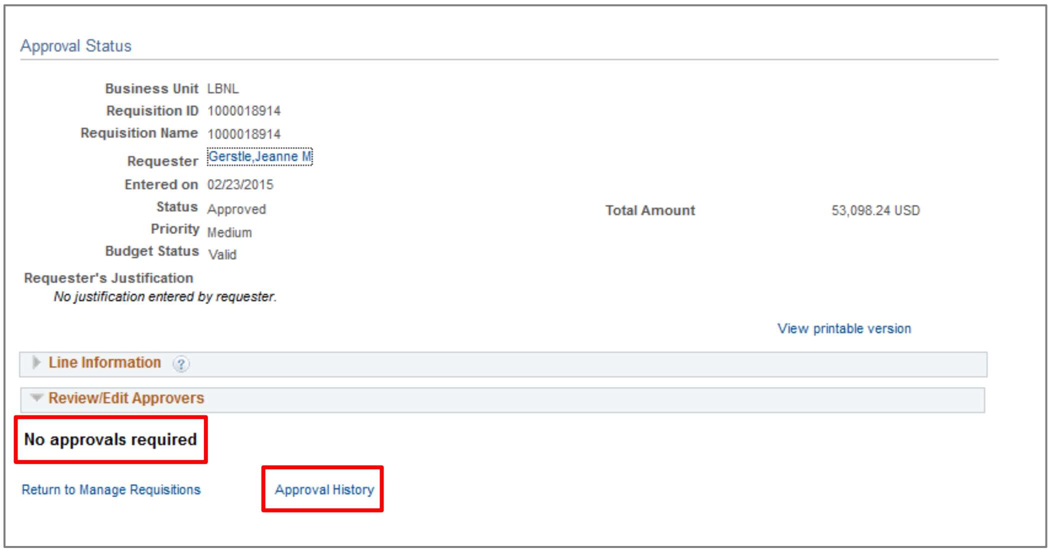
A sample *Approval Status* screen that shows the requisition as "Pending" approval is shown below.



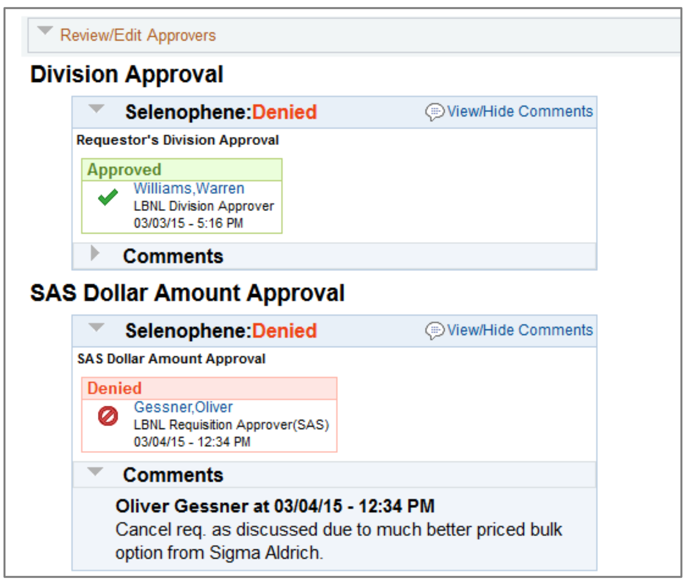
A sample *Approval Status* screen that shows the requisition as "Approved" is shown below.



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.



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



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.

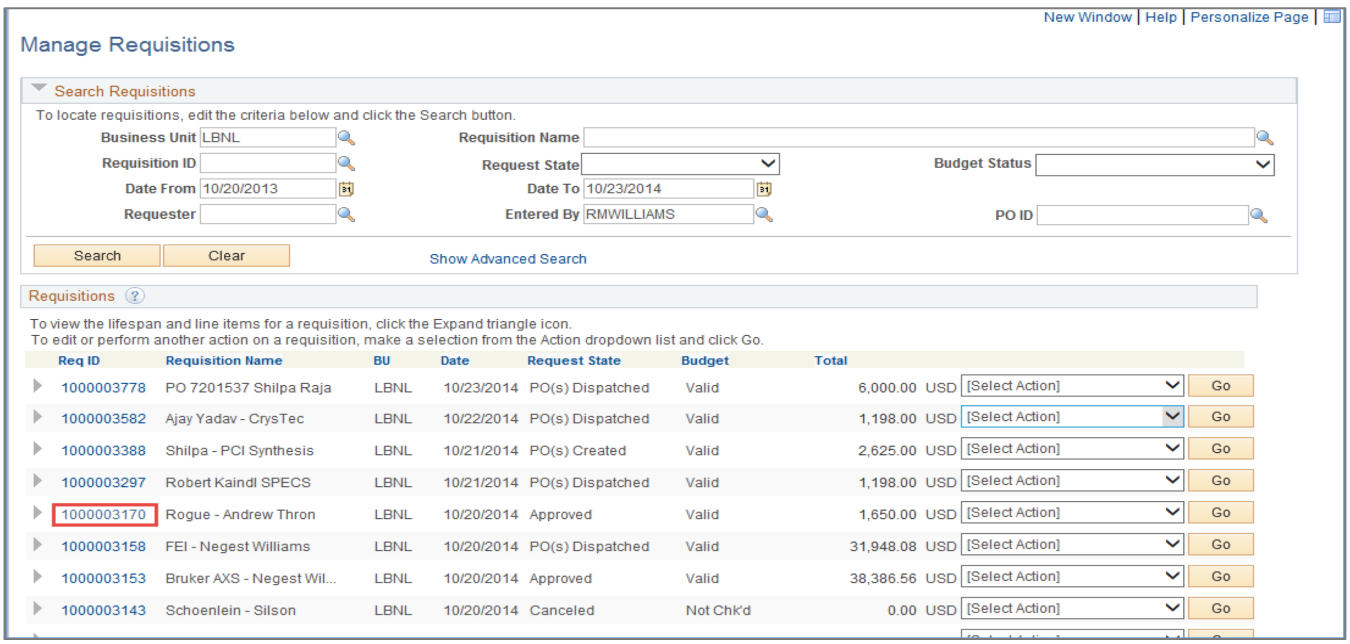
Has My Requisition Been Assigned to a Buyer and Who is the Buyer?

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

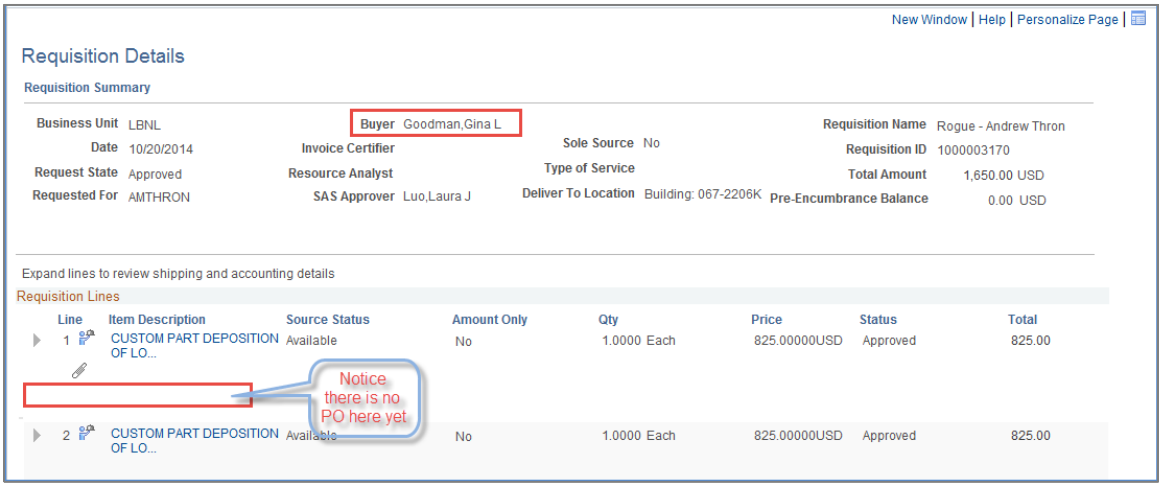
- PO(s) Dispatched
- PO(s) Created
- Received

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.



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


New Window | Help | Personalize Page
Requisition Details
Requisition Summary
Business Unit LBNL
Date 10/20/2014
Request State Approved
Requested For AMTHRON
Buyer Goodman,Gina L
Invoice Certifier
Resource Analyst
SAS Approver Luo,Laura J
Sole Source No
Type of Service
Deliver To Location Building: 067-2206K
Requisition Name Rogue - Andrew Thron
Requisition ID 1000003170
Total Amount 1,650.00 USD
Pre-Encumbrance Balance 0.00 USD
Expand lines to review shipping and accounting details
Requisition Lines
Line Item Description Source Status Amount Only Qty Price Status Total
1 CUSTOM PART DEPOSITION OF LO... Available No 1.0000 Each 825.00000USD Approved 825.00
Notice there is no PO here yet
2 CUSTOM PART DEPOSITION OF LO... Available No 1.0000 Each 825.00000USD Approved 825.00

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

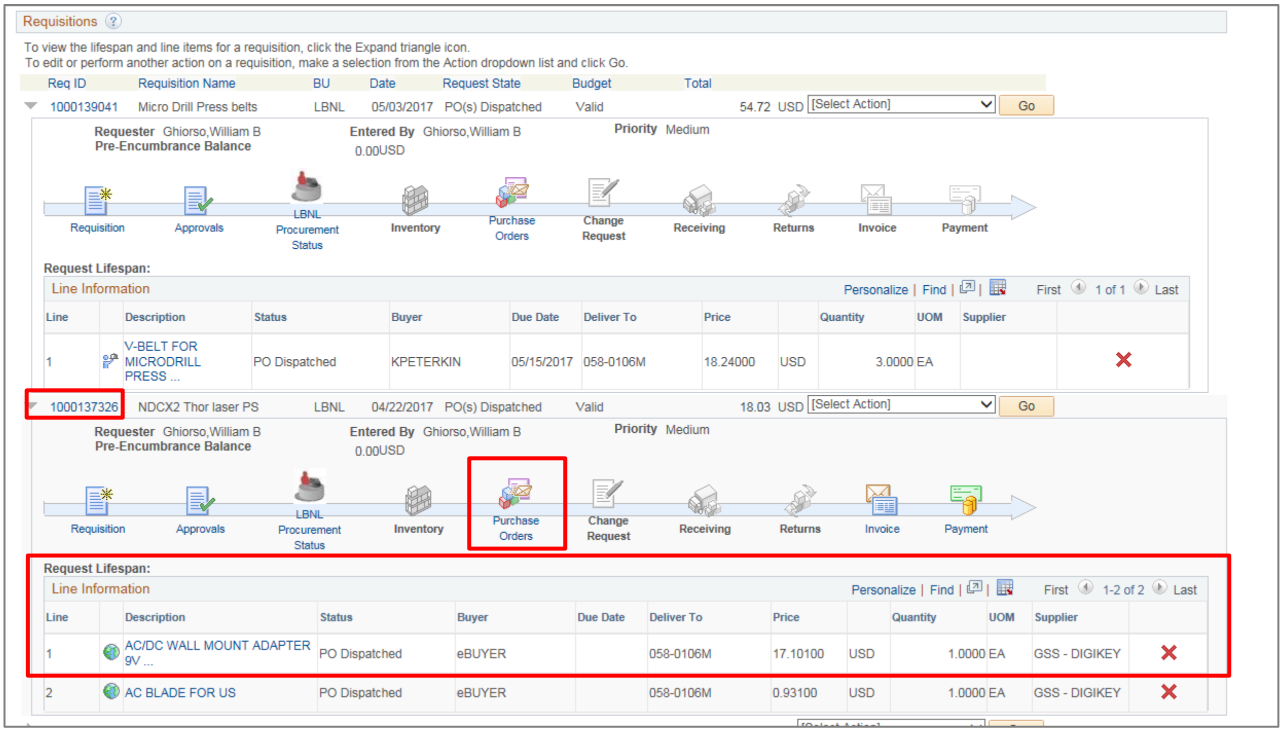
PO information can be viewed on the Request Lifespan.

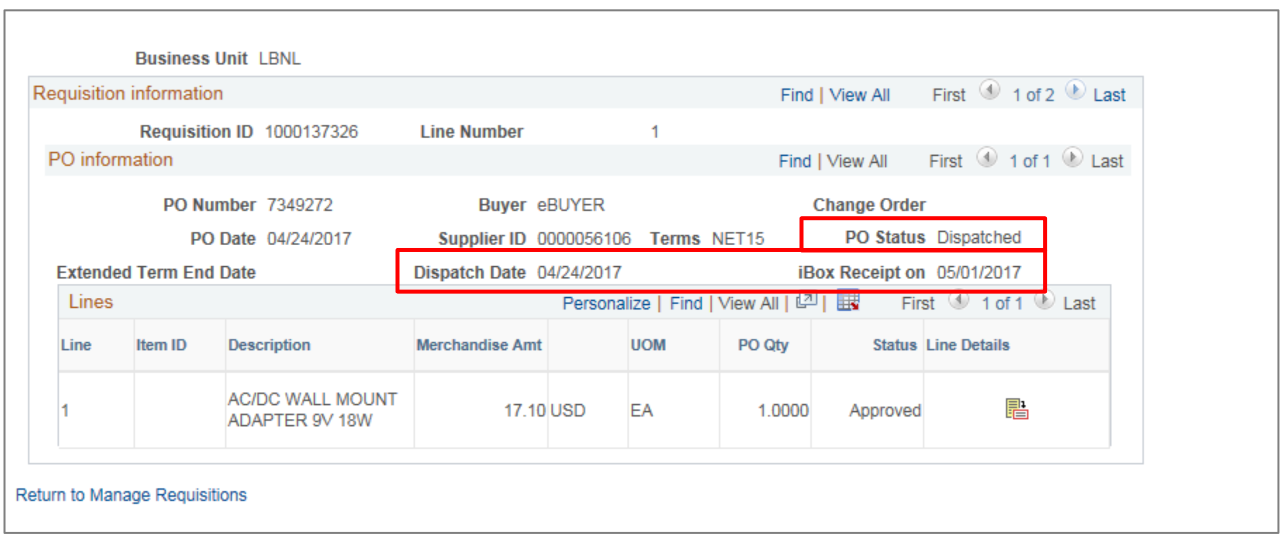
- PO Number
- PO Date (when the PO was first created)
- Due Date
- Supplier Name
- Deliver To
- Buyer

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:

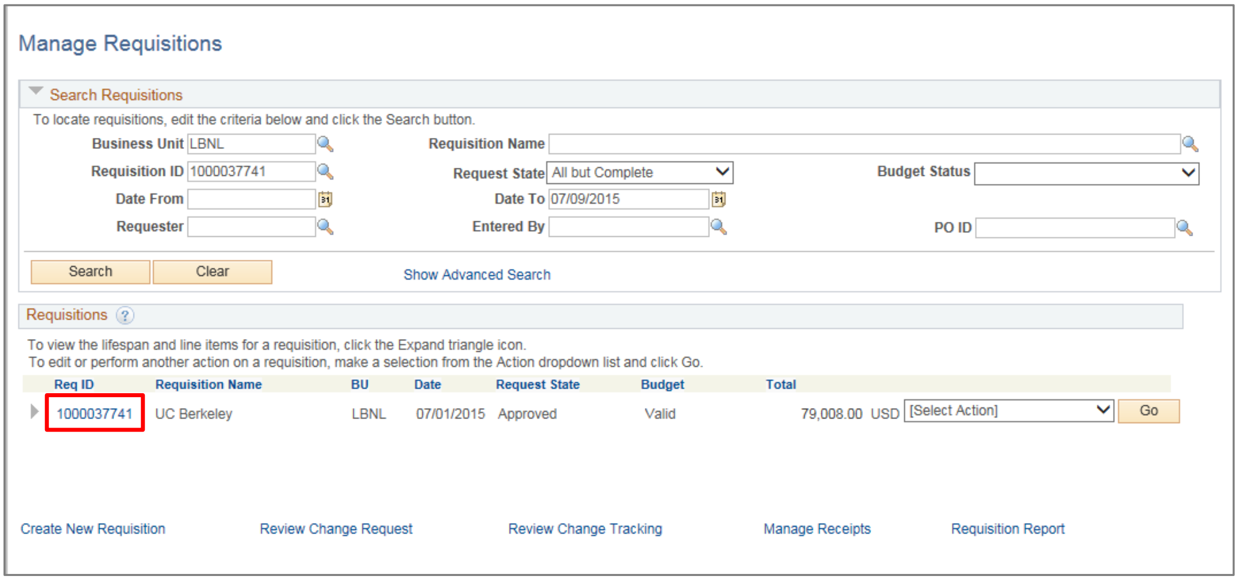
- Date dispatched (sent to supplier)
- iBox Date (date scanned into Receiving)


Requisitions
To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.
Req ID
Requisition Name
BU
Date
Request State
Budget
Total
1000139041
Micro Drill Press belts
LBNL
05/03/2017
PO(s) Dispatched
Valid
54.72 USD
[Select Action]
Go
Requester Ghiorso,William B
Pre-Encumbrance Balance
Entered By Ghiorso,William B
0.00USD
Priority Medium
Requisition
Approvals
LBNL Procurement Status
Inventory
Purchase Orders
Change Request
Receiving
Returns
Invoice
Payment
Request Lifespan:
Line Information
Personalize | Find |
First 1 of 1 Last
Line
Description
Status
Buyer
Due Date
Deliver To
Price
Quantity
UOM
Supplier
1
V-BELT FOR MICRODRILL PRESS ...
PO Dispatched
KPETERKIN
05/15/2017
058-0106M
18.24000
USD
3.0000
EA
1000137326
NDCX2 Thor laser PS
LBNL
04/22/2017
PO(s) Dispatched
Valid
18.03 USD
[Select Action]
Go
Requester Ghiorso,William B
Pre-Encumbrance Balance
Entered By Ghiorso,William B
0.00USD
Priority Medium
Requisition
Approvals
LBNL Procurement Status
Inventory
Purchase Orders
Change Request
Receiving
Returns
Invoice
Payment
Request Lifespan:
Line Information
Personalize | Find |
First 1-2 of 2 Last
Line
Description
Status
Buyer
Due Date
Deliver To
Price
Quantity
UOM
Supplier
1
AC/DC WALL MOUNT ADAPTER 9V ...
PO Dispatched
eBUYER
058-0106M
17.10100
USD
1.0000
EA
GSS - DIGIKEY
2
AC BLADE FOR US
PO Dispatched
eBUYER
058-0106M
0.93100
USD
1.0000
EA
GSS - DIGIKEY

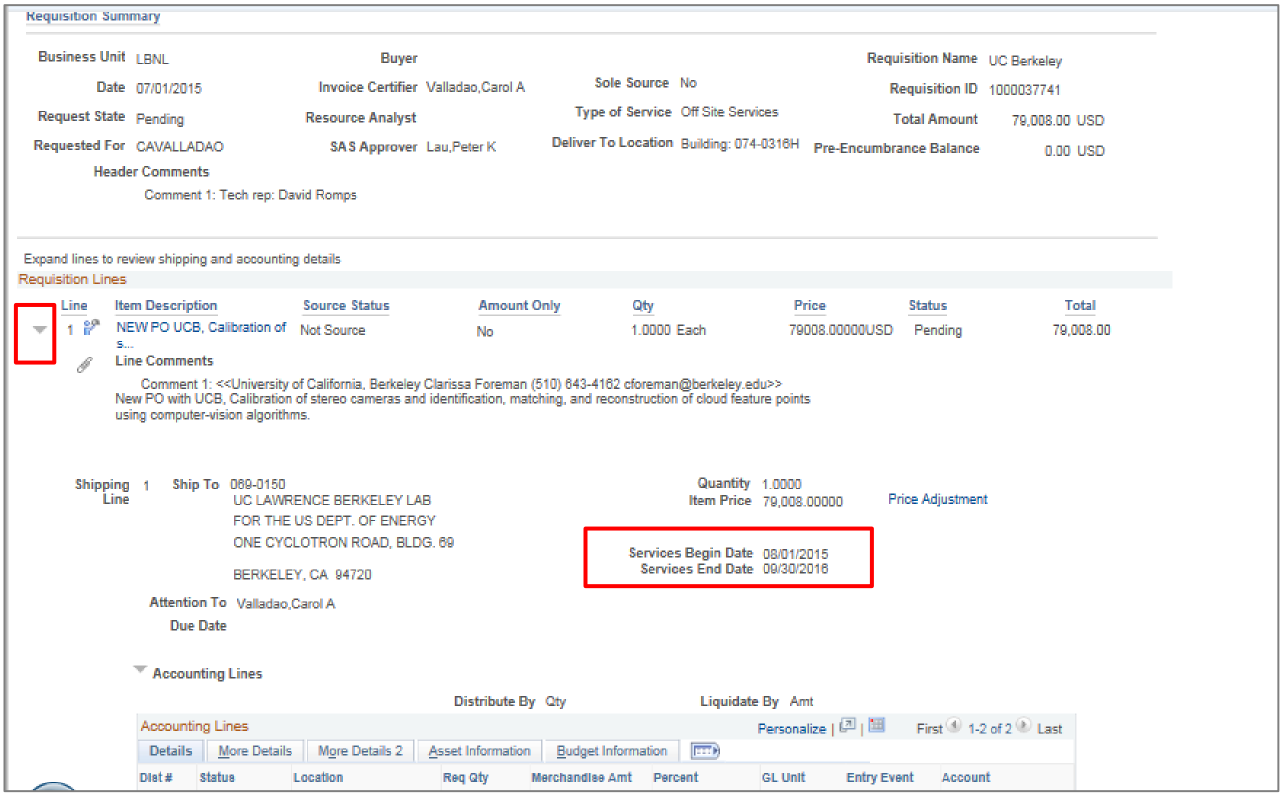

Business Unit LBNL
Requisition information
Find | View All
First 1 of 2 Last
Requisition ID 1000137326
Line Number 1
PO information
Find | View All
First 1 of 1 Last
PO Number 7349272
Buyer eBUYER
Change Order
PO Date 04/24/2017
Supplier ID 0000056106
Terms NET15
PO Status Dispatched
Extended Term End Date
Dispatch Date 04/24/2017
iBox Receipt on 05/01/2017
Lines
Personalize | Find | View All |
First 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
Return to Manage Requisitions

Where Can I see the Services Begin and End Dates?

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



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



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.

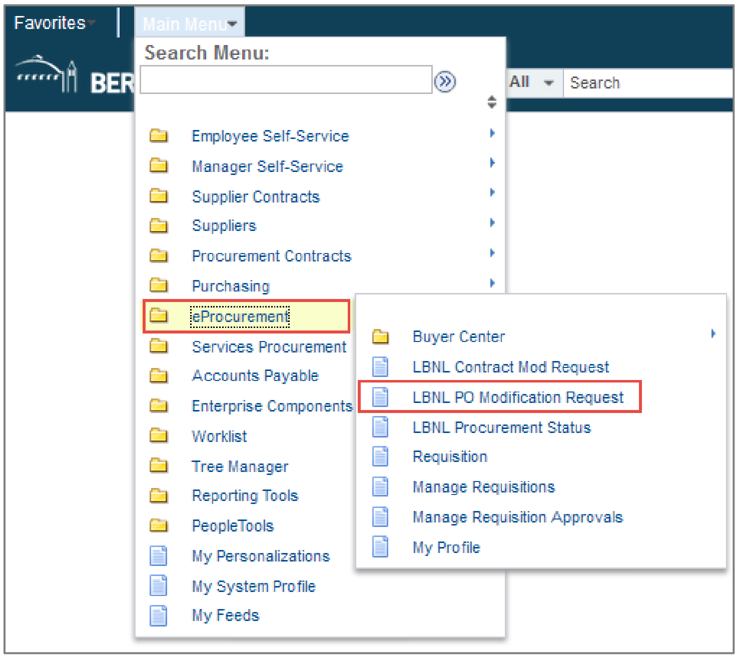
Modification with No Add in Funding

The *LBNL PO Modification Request* screen is used to request modifications to existing POs that do not cause an increase in price. 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 *Sequential Funding Procedure Document* for information on Sequential Funding.

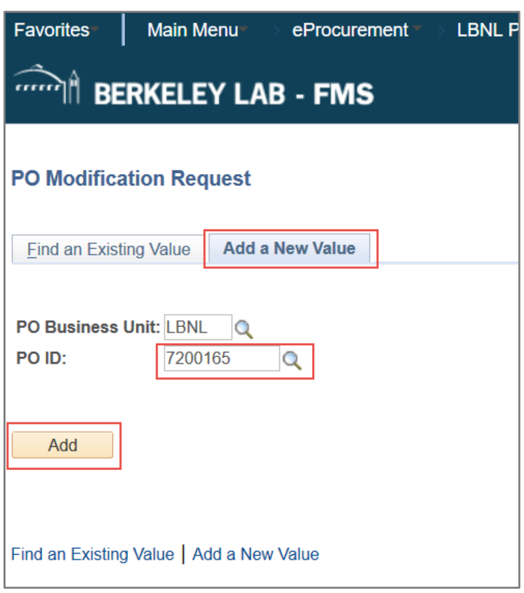
You can access the *PO Modification Request* screen by navigating to:

Main Menu | eProcurement | LBNL PO Modification Request



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

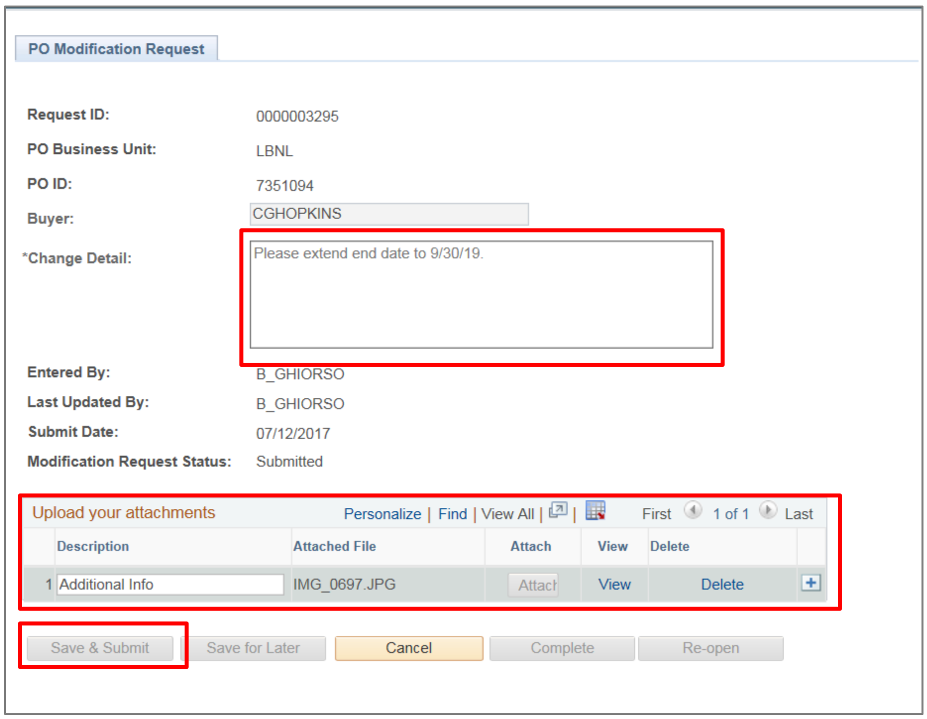
- Click the "Add a New Value" tab.
- Enter the PO number you want modified.
- Click the "Add" button.



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.



- 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

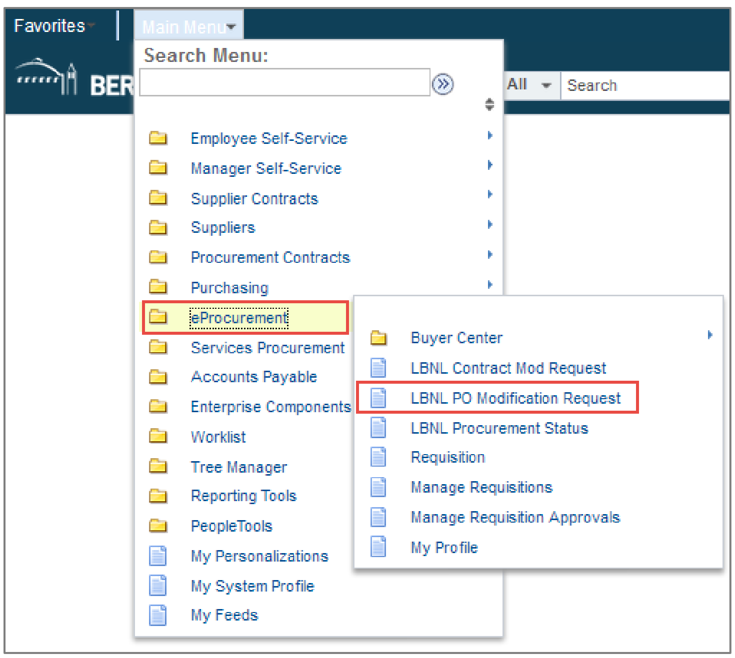
Your PO Modification Request for PO# 7351094 is now Complete

PO Modification Request Details
==
PO #: 7351094
Buyer: Hopkins,Craig
Submit Date: 2017-07-12
Completed Date: 2017-07-19
Change Detail: Please extend end date to 9/30/19.

Cancel a PO Modification Request

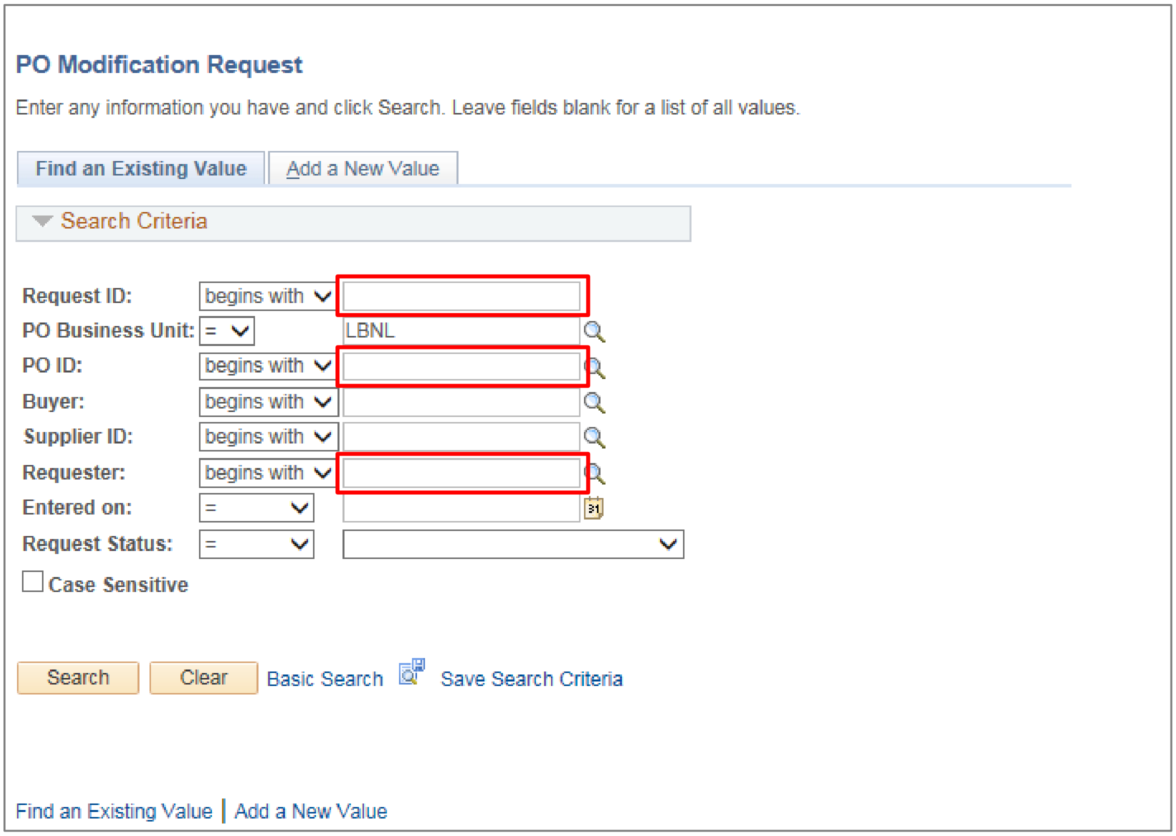
To cancel an already submitted PO Modification Request navigate to:

Main Menu | eProcurement | LBNL PO Modification Request

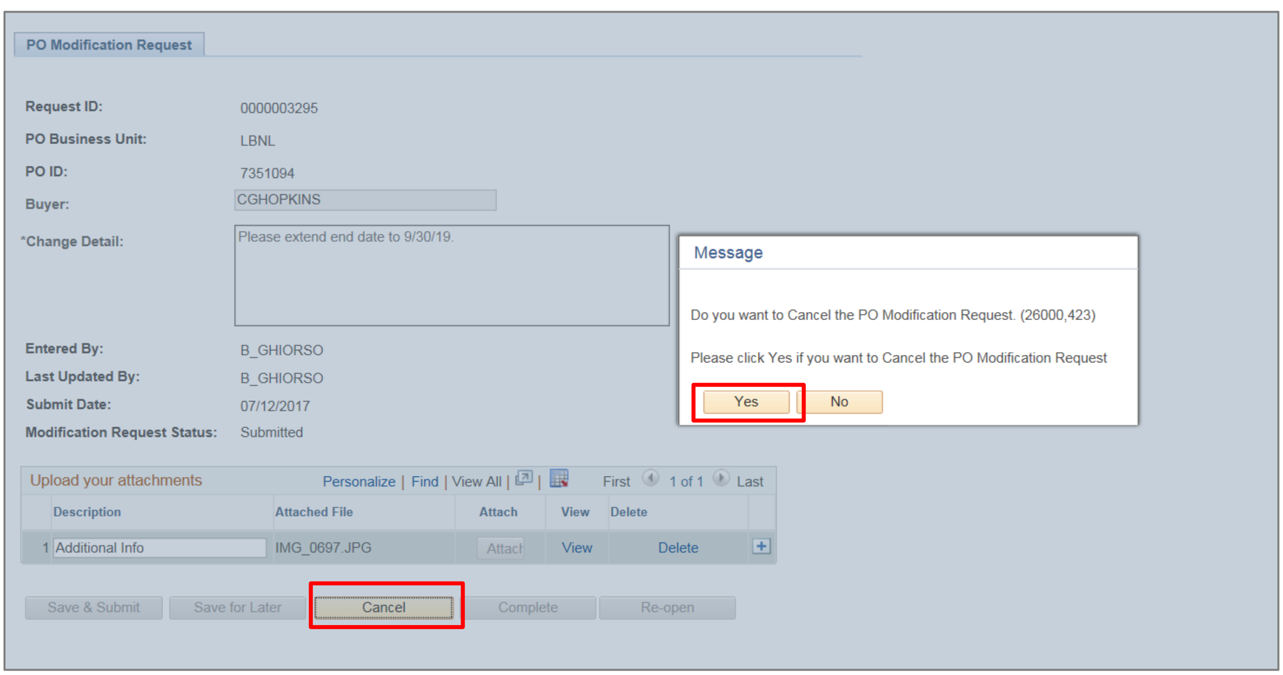


This takes you to the initial *PO Modification Request* screen.

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.



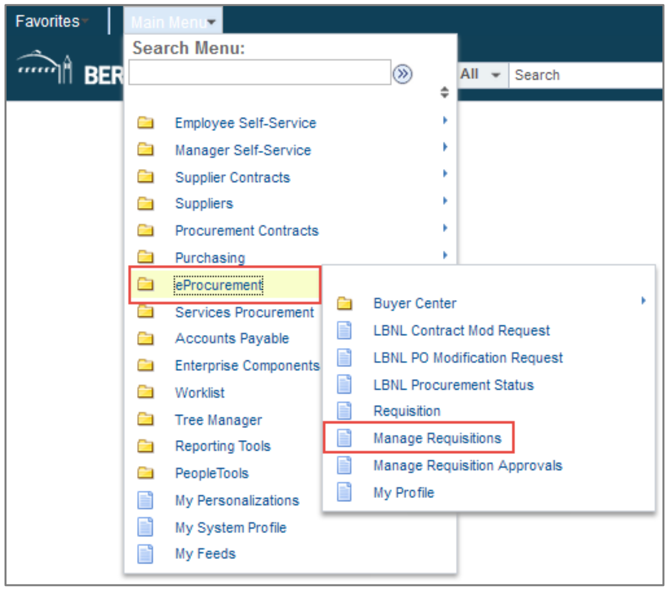
When the PO Modification Request screen opens, click on the "Cancel" button. Then, click on "Yes" to the Message. The item will be removed from the buyer's worklist queue.



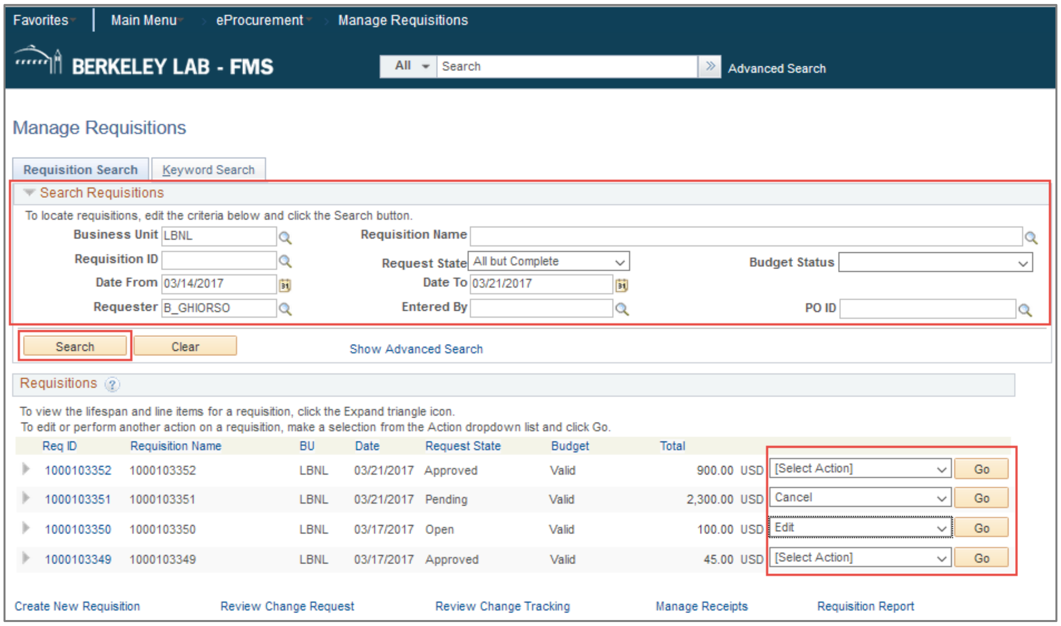
Edit or Cancel a Requisition

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.

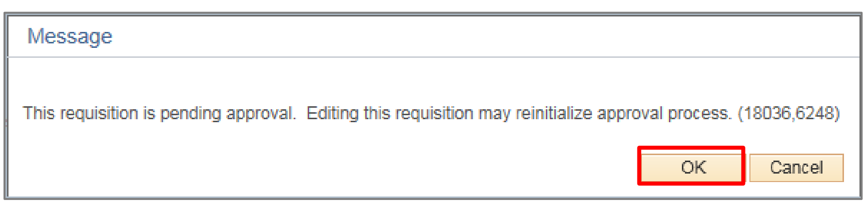


Edit an Existing Requisition

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

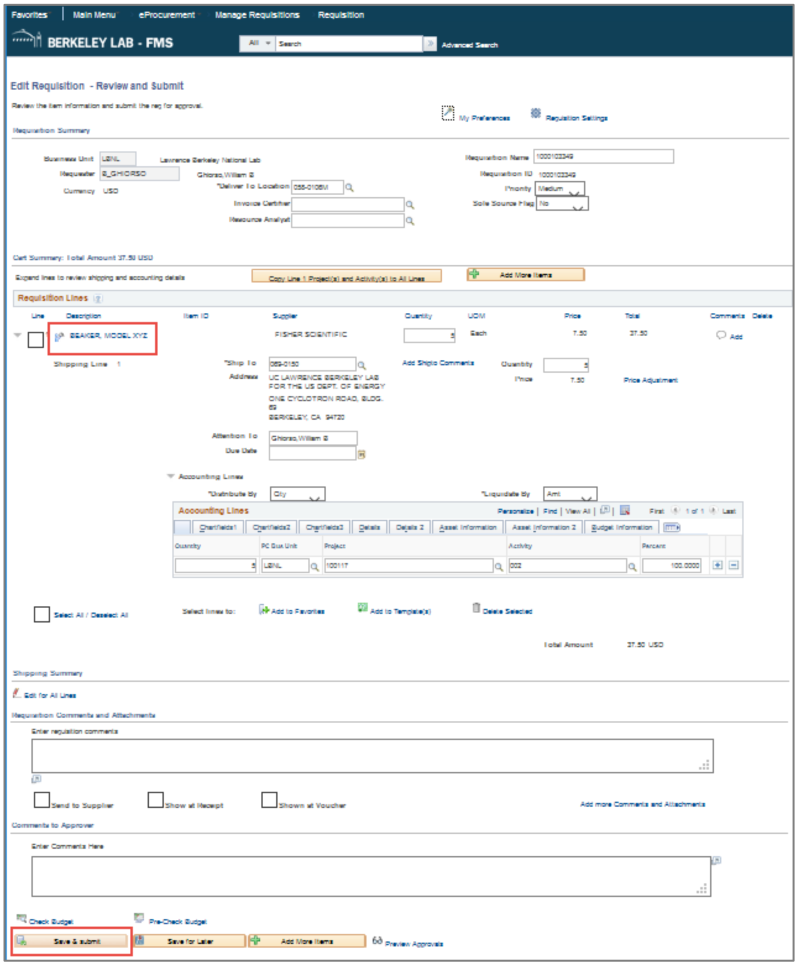
Note that you cannot edit a requisition that has been put onto a PO by a buyer. If you wish to edit a requisition that has been put onto a PO by a buyer, contact the buyer. If the PO has not been awarded to the vendor, the buyer can cancel the PO. Cancellation of the PO will allow you to edit the requisition.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

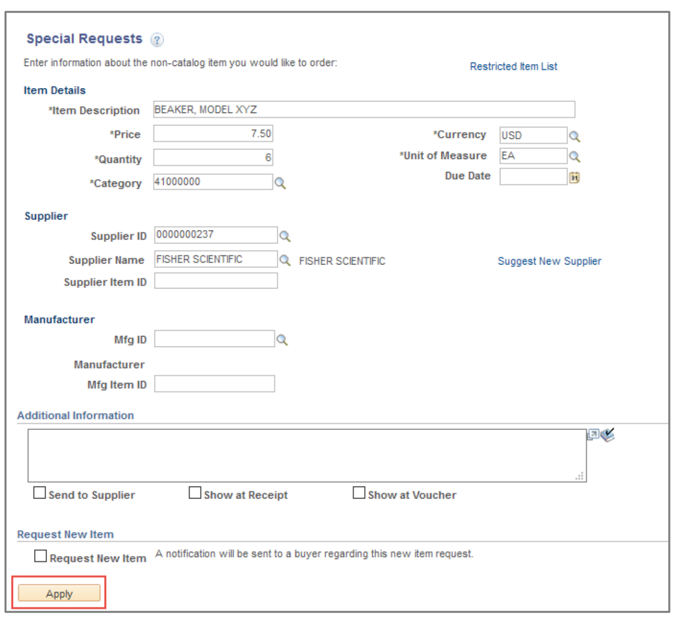
Click the "OK" button to continue.



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.

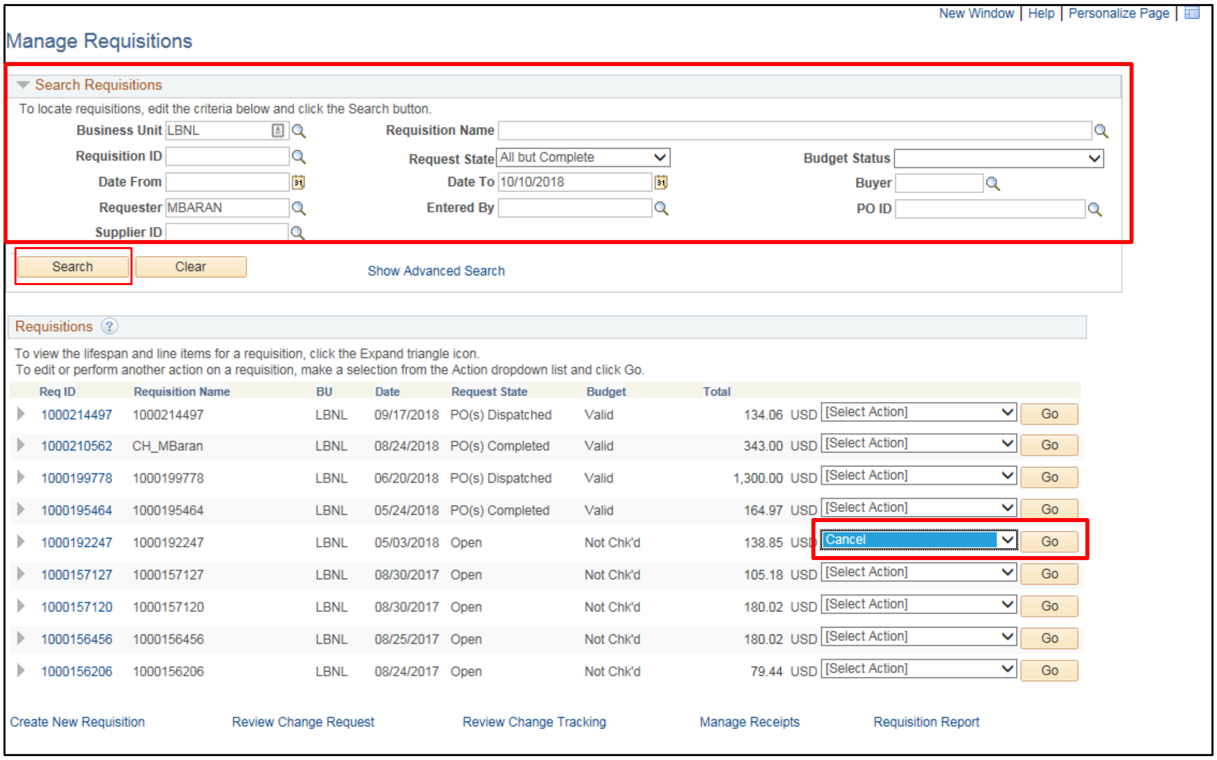
When finished making changes to the requisition, click the “Save & submit” button.



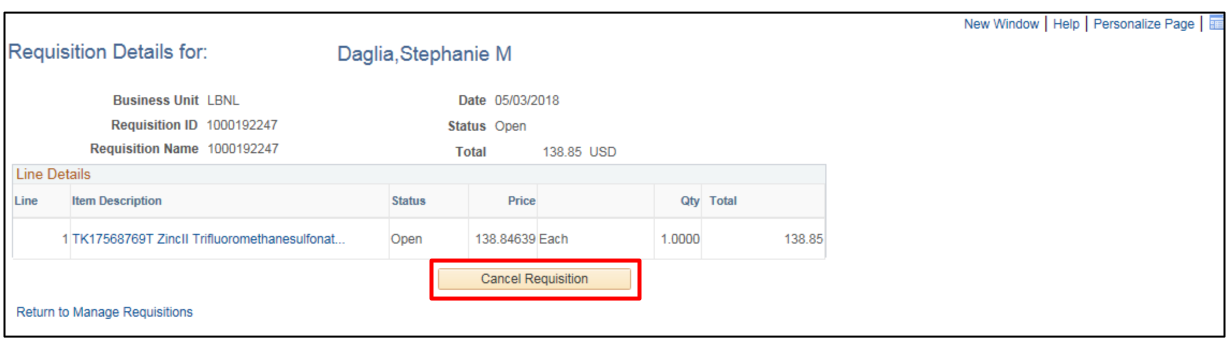


Cancel or Undo-Cancel a Requisition

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.)



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

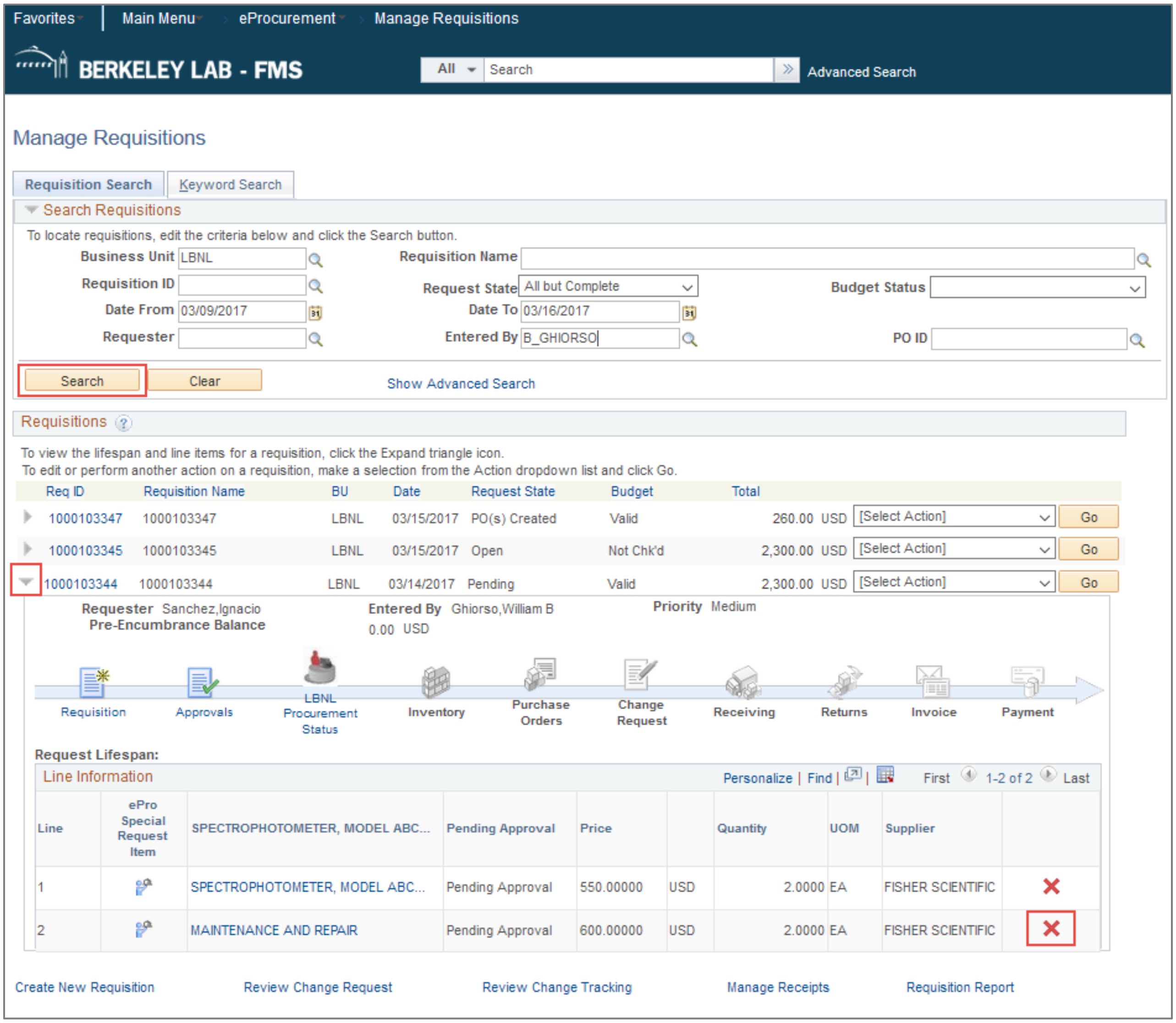


Cancelled requisitions can be reopened by selecting “Undo Cancel” from the “Select Action” drop-down menu on the *Manage Requisitions* screen.

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.

WARNING: You cannot undo a cancelled line, so be sure that you select the correct line.



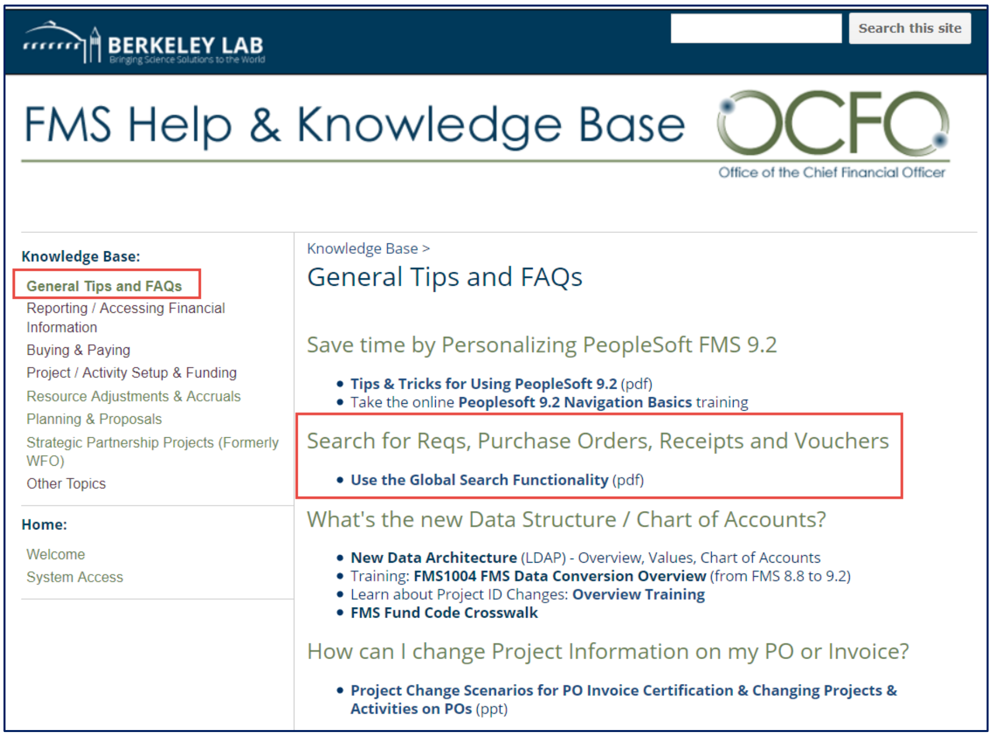
Module 3 – Time-Saving Features

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

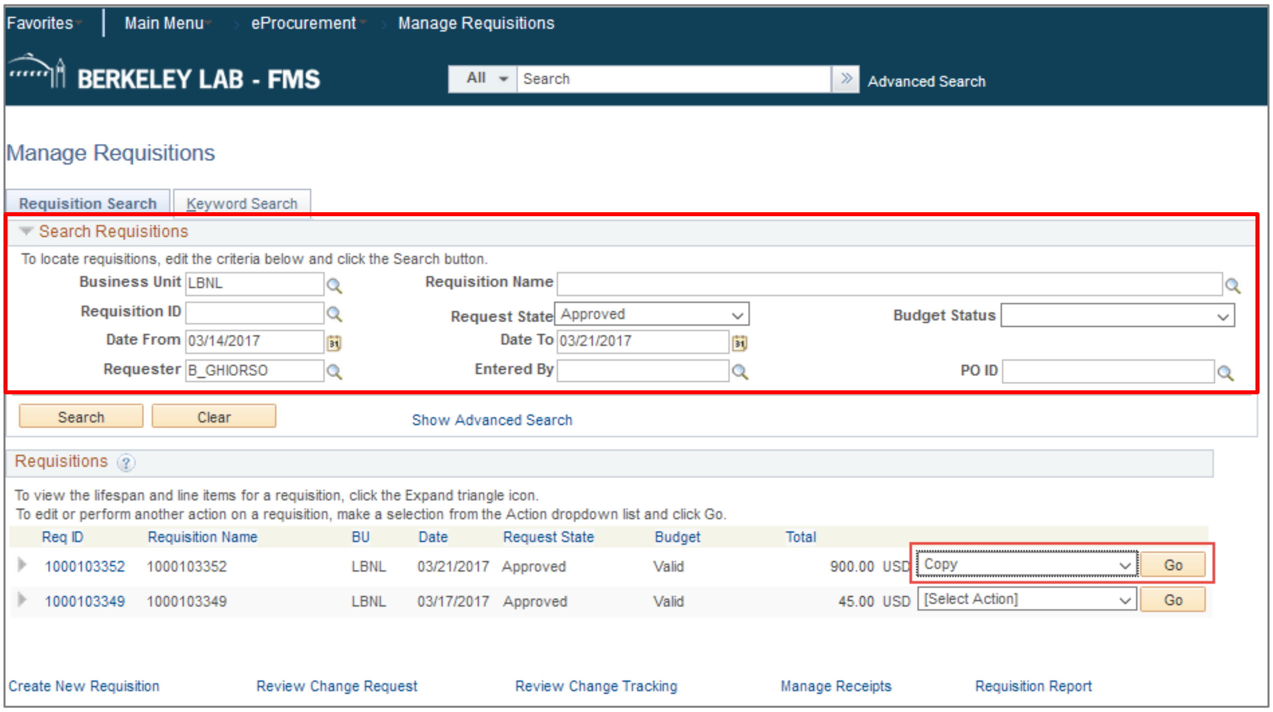


The search functionalities provide quick and easy options to find requisitions, purchase orders, receipts, and vouchers online from FMS. The reference guide covers two methods:

- 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).



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.

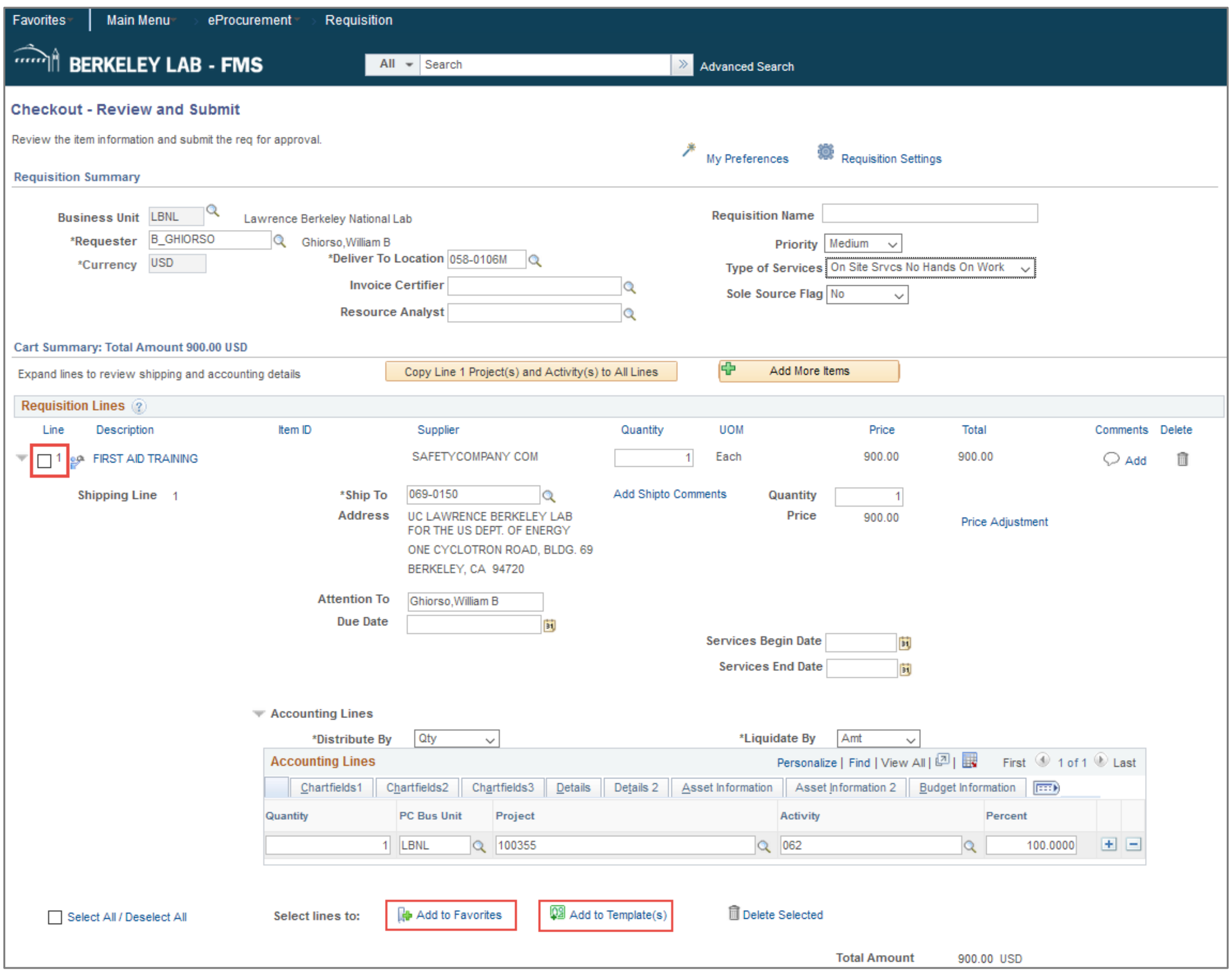
Favorites & Templates

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.

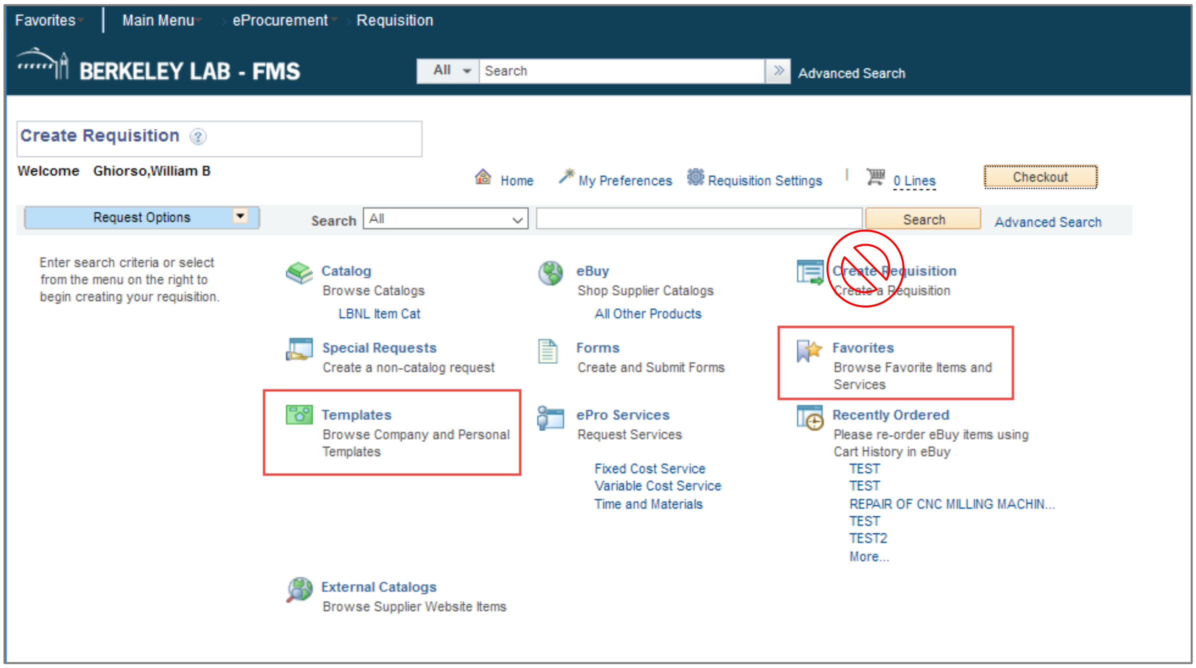
To **create** a Favorite or Template:

- 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.

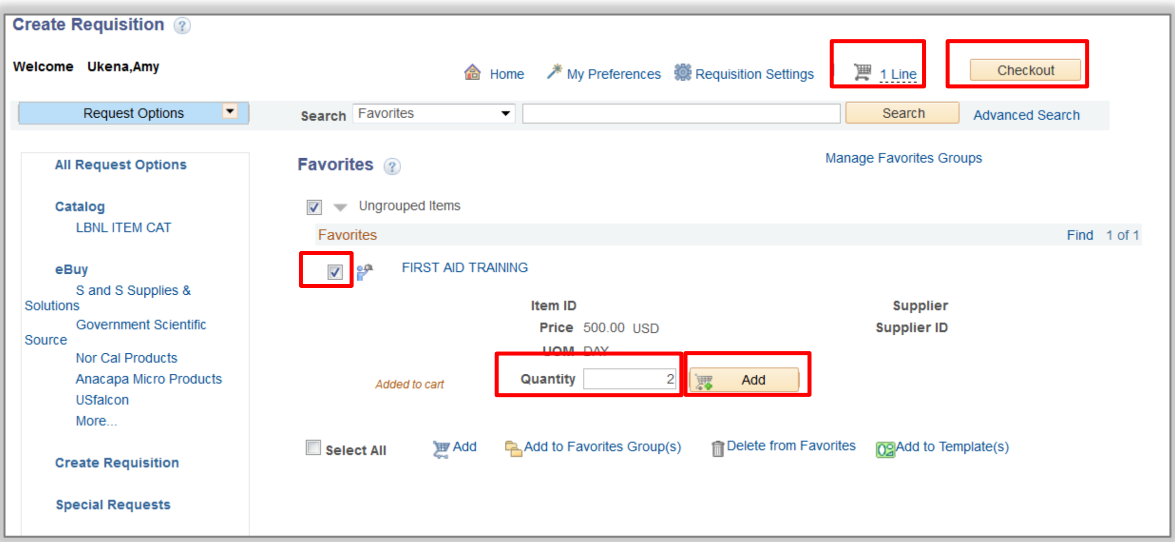


To **use** a Favorite or Template on a new requisition:

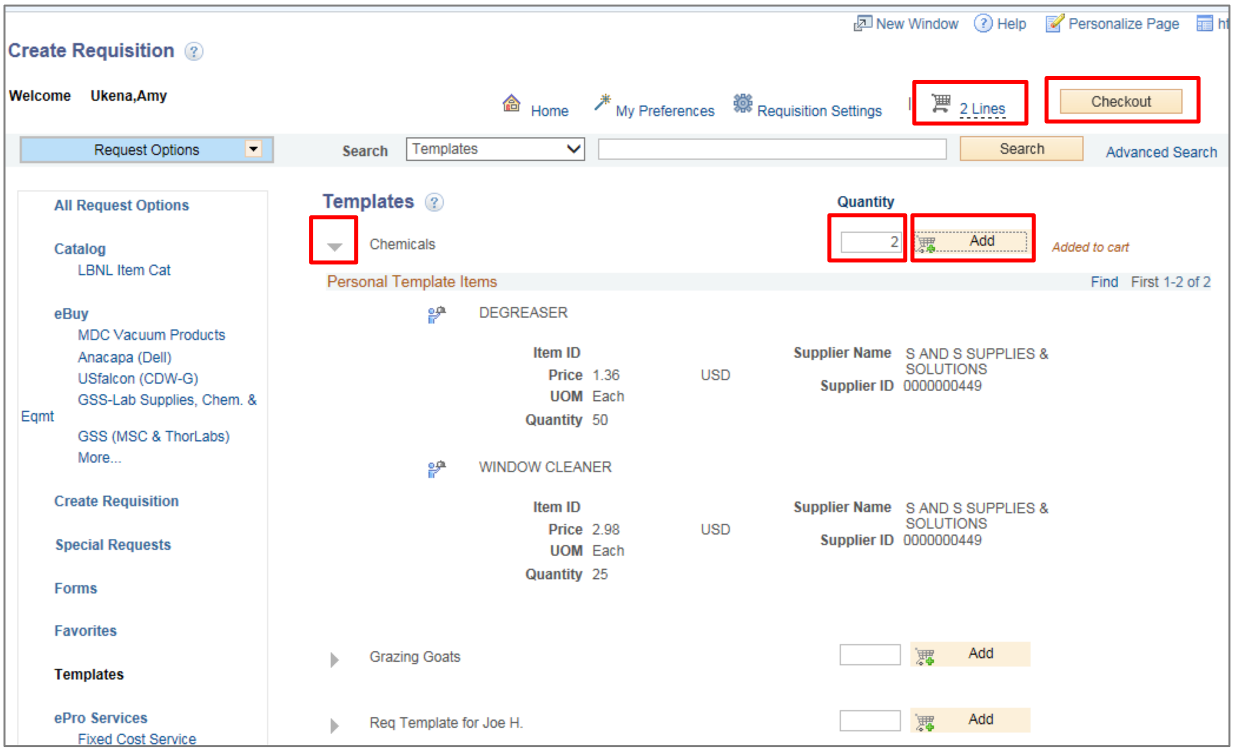
- Go to the eProcurement menu and select "Requisition."
- Instead of clicking the "Create Requisition" link, click the "Favorites" link or the "Templates" link.



- 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."



- 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.”



- 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.

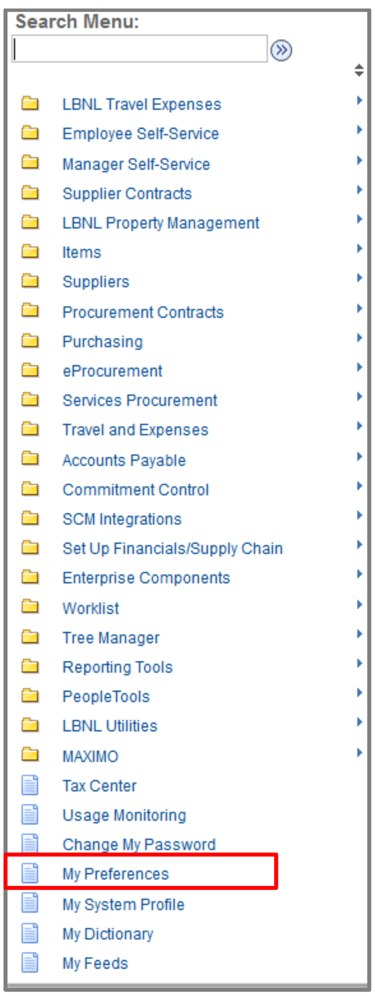
Navigation Personalization

Autocomplete

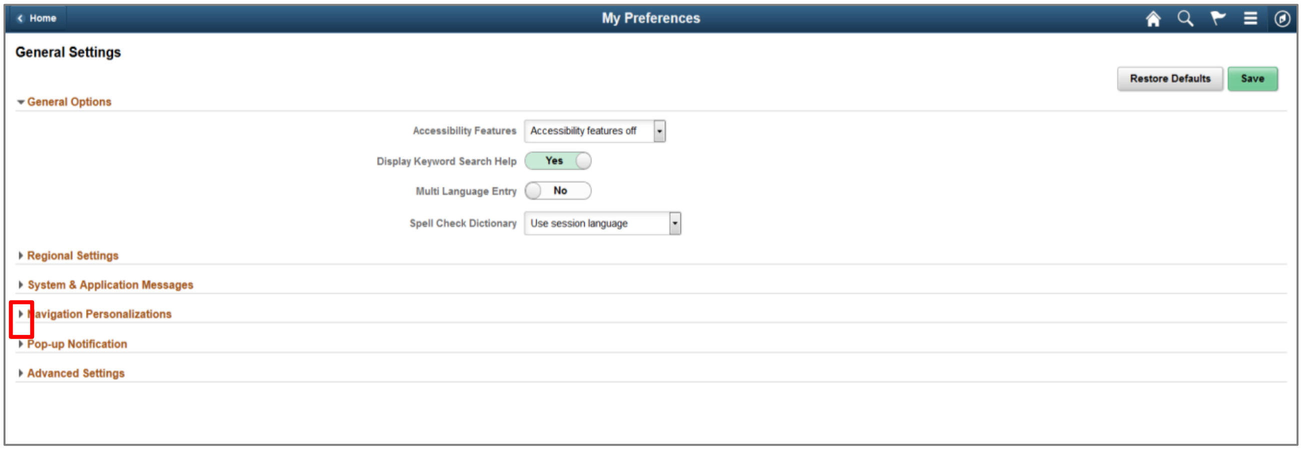
The autocomplete function in FMS can be enabled/disabled for lookup fields. When enabled, the system will suggest appropriate values as you type.

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

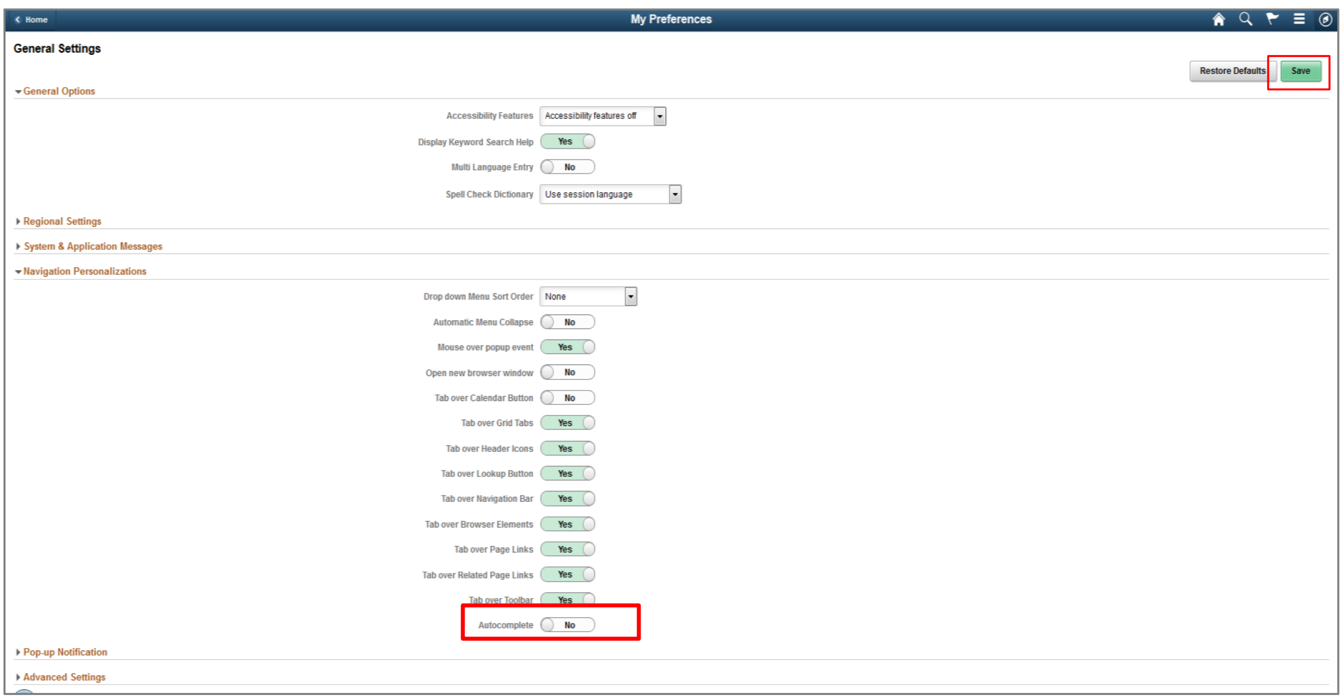
In the window that opens, click the “My Preferences” link.



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



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.

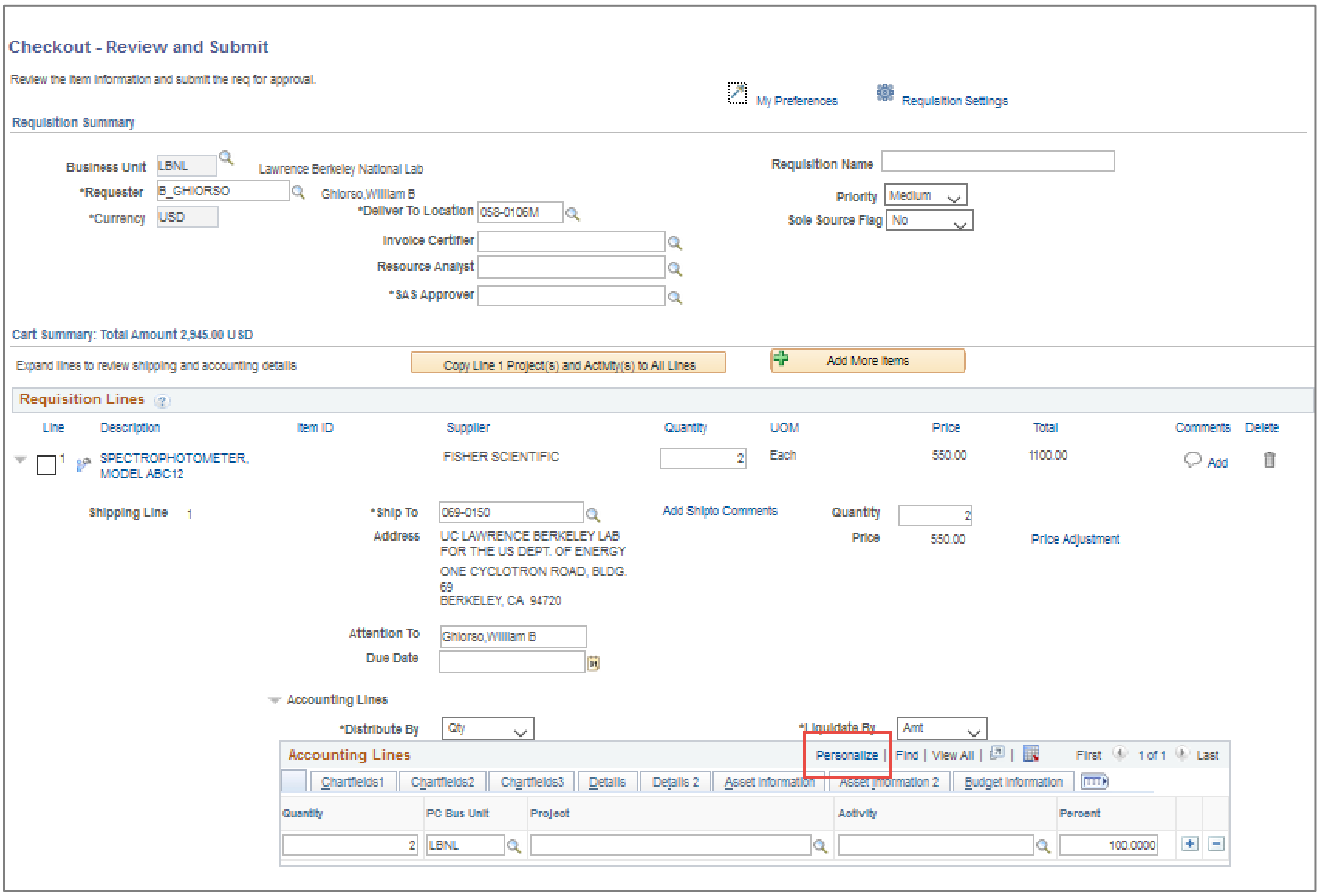


Personalization of Requisitions

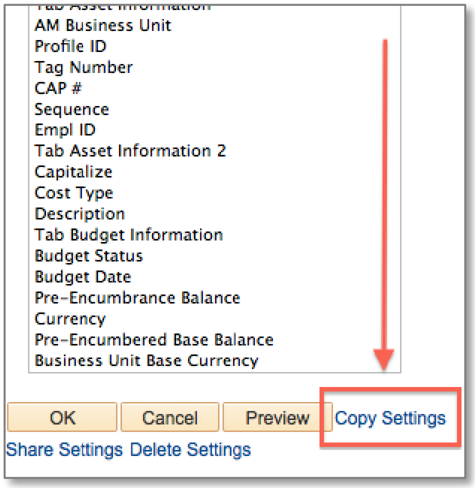
Setting the Field Order

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.

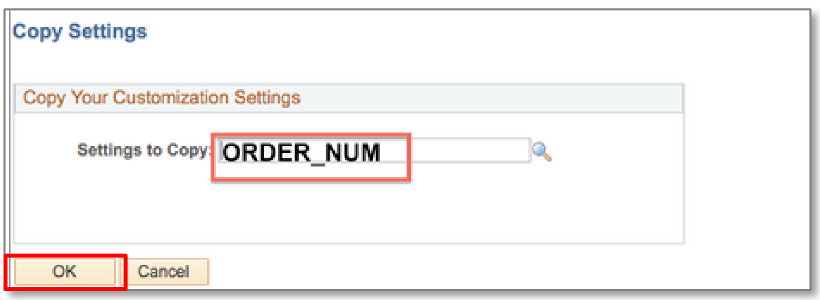


In the window that opens, scroll to the bottom and click the “Copy Settings” link.



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

Click on the “OK” button.



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

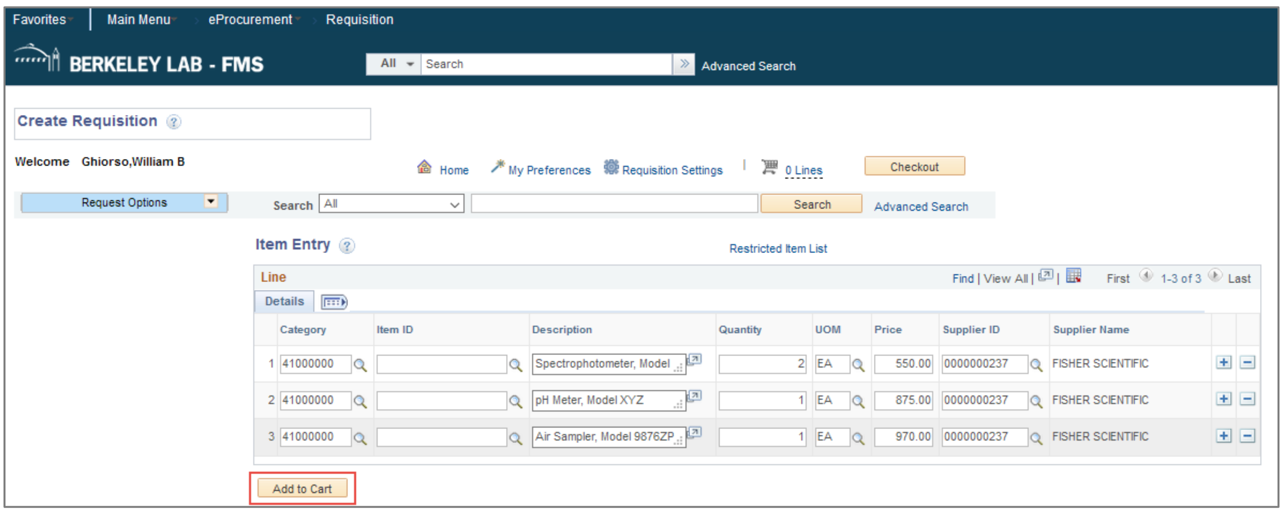
Note: The settings will take effect only after you exit and return to the previous window. In this example, you would be returned to the *Checkout* screen.

Applying Same Project and Activity for an Entire Order

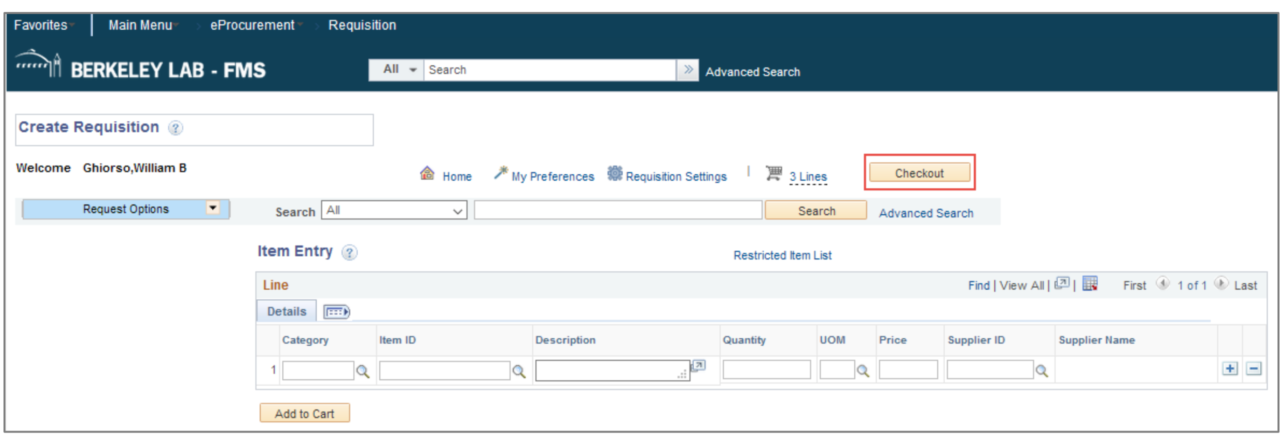
If the Project and Activity is the same for multiple lines in the order, you can apply this information using the “Copy Line 1 Project(s) and Activity(s) to All Lines” button on the *Checkout – Review and Submit* screen.

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.

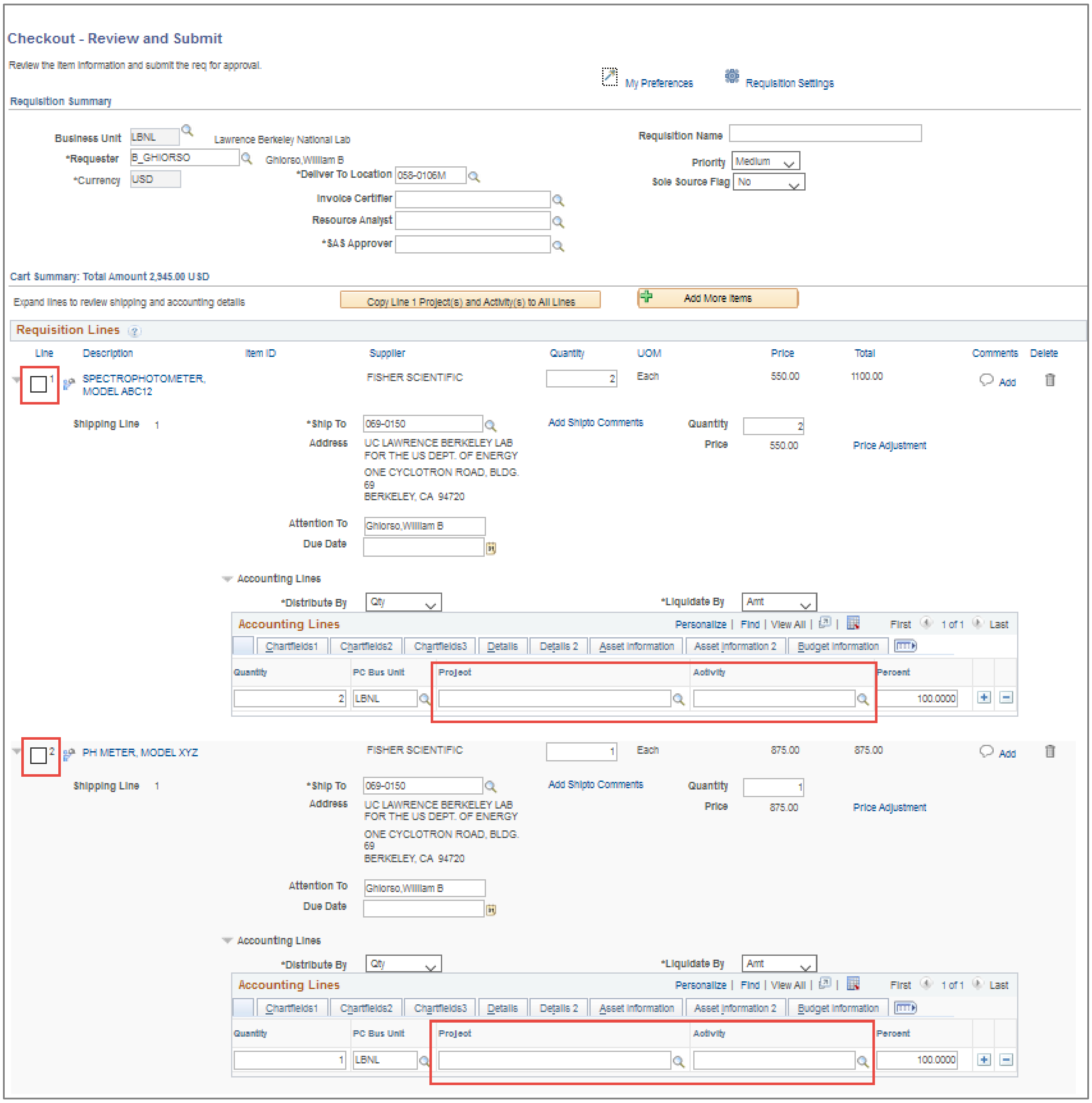
Enter more than one line item on the *Item Information* screen and click “Add to Cart.”



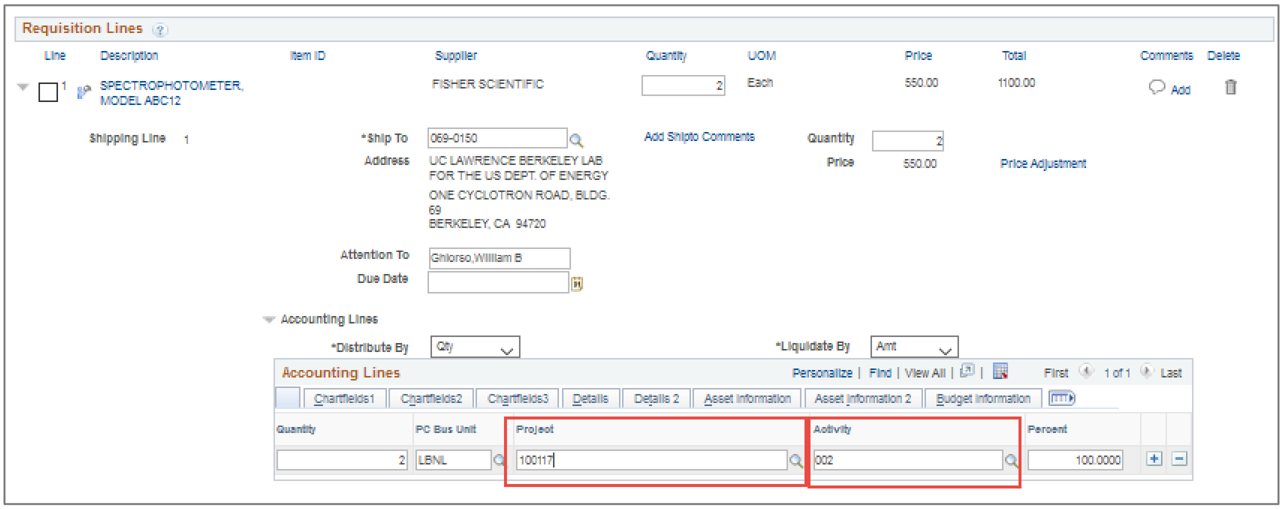
After the order has been added to the cart, select “Checkout.”



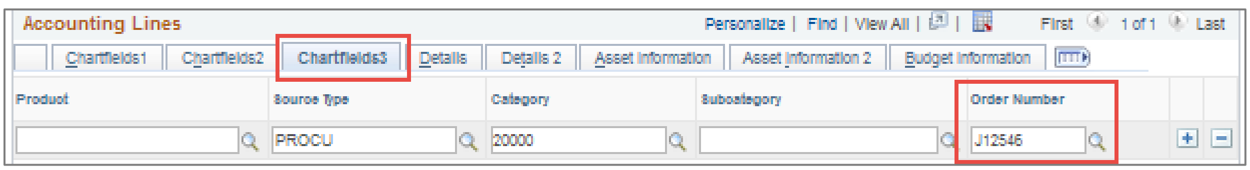
Note: The order will have more than one line item, with no Project / Activity identified yet.



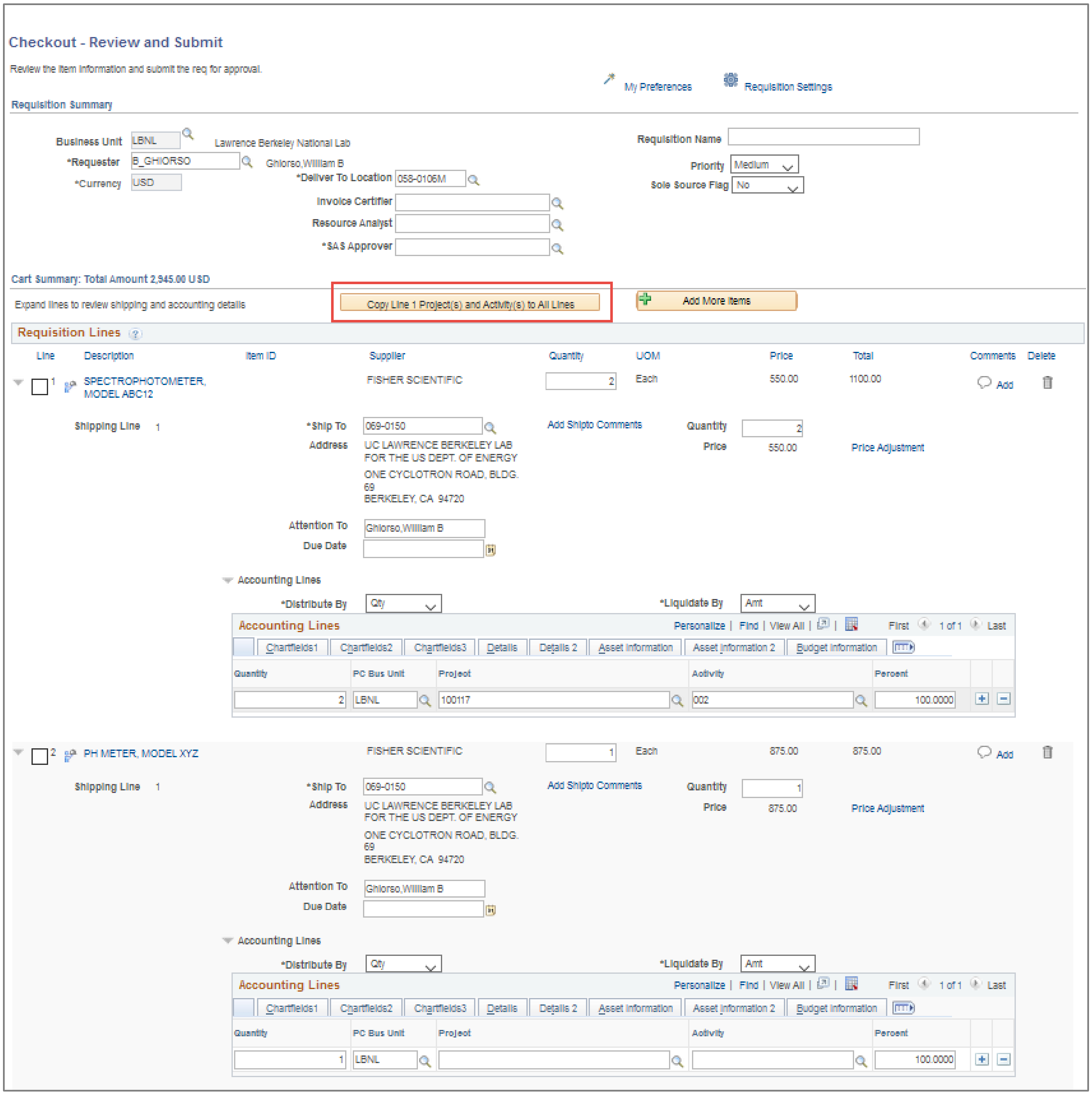
On line 1, enter the Project and Activity funding the entire purchase. You can use the magnifying glass / lookup icon to help locate it.



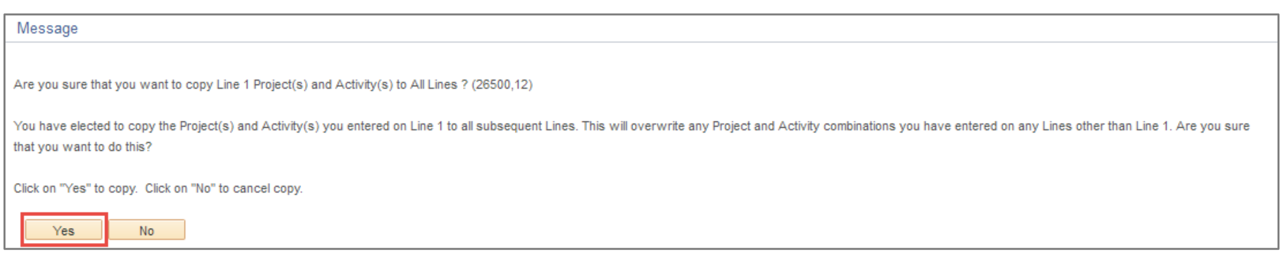
If applicable, enter the Work Order number. Click the “Chartsfields3” Tab and type in the Work Order number in the “Order Number” field, or use the magnifying glass / lookup icon to select the Work Order number.



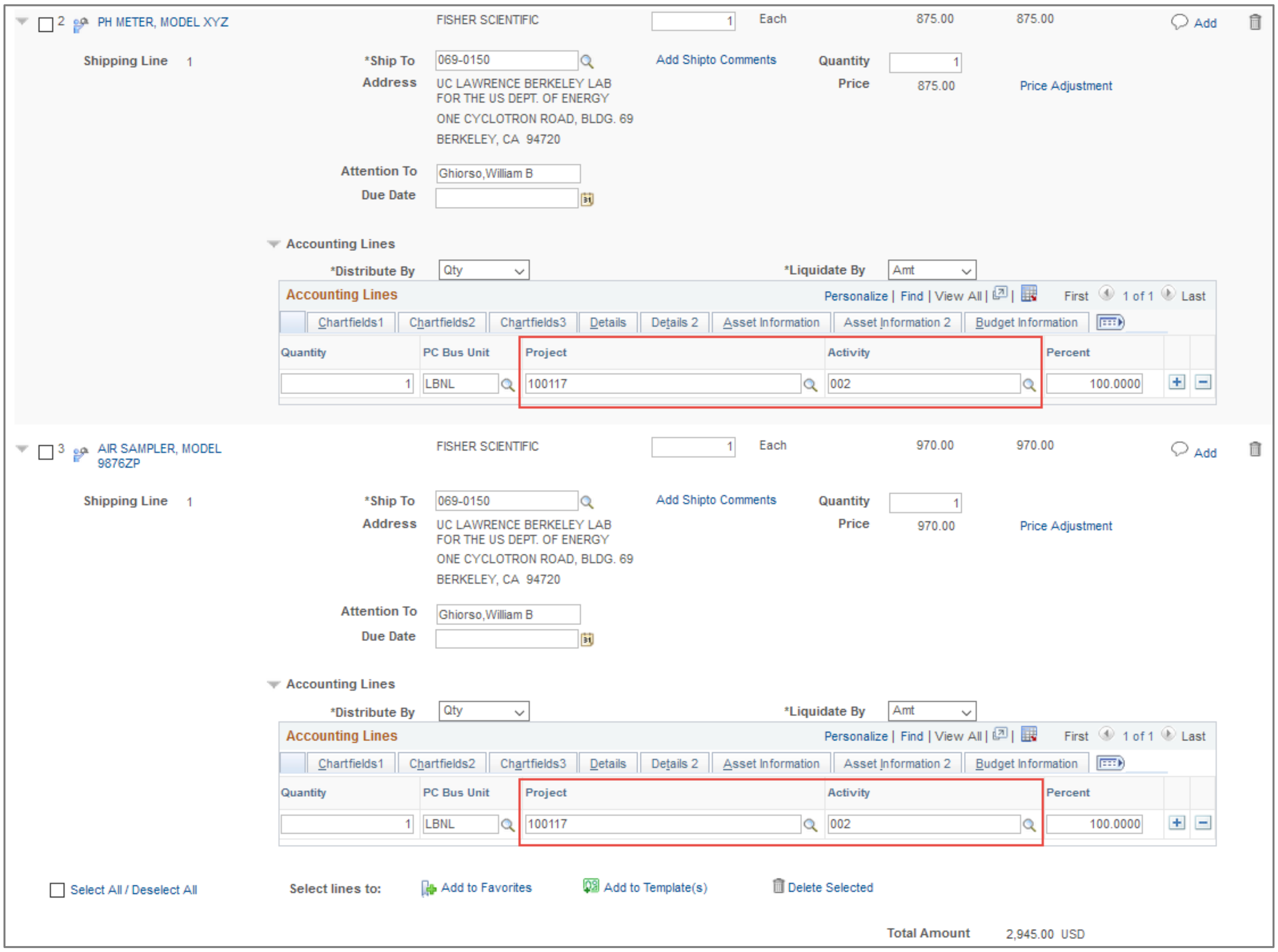
Click on the “Copy Line 1 Projects(s) and Activity(s) to All Lines” button to apply the information to all requisition lines.



Click on “Yes” to the confirmation warning message.

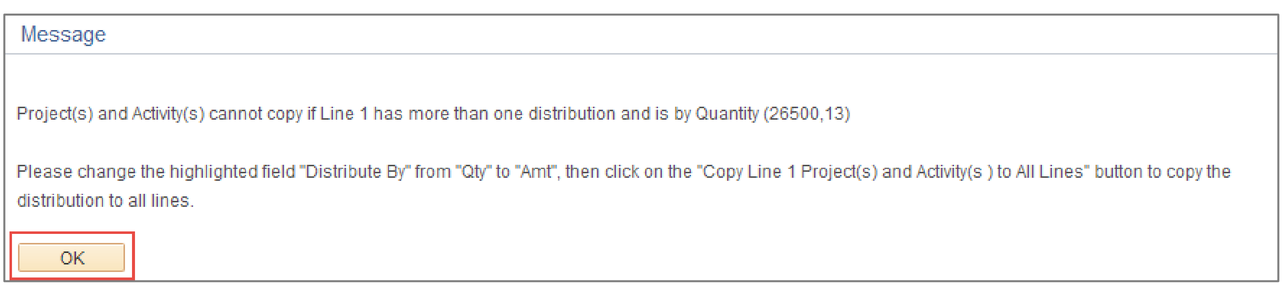


The Project and Activity (and Work Order number by clicking on the Chartfields3 tab, if applicable) is copied to all subsequent requisition lines.



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.



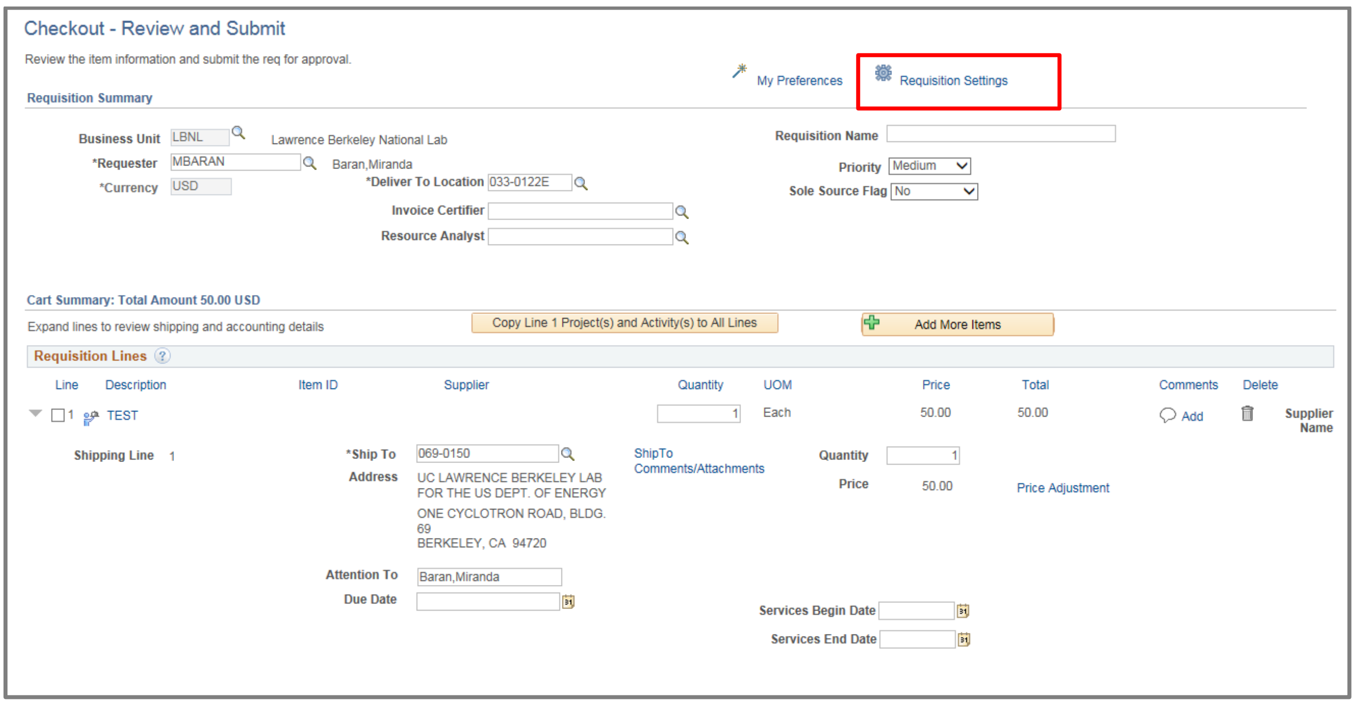
To distribute the Project(s) and Activity(s), you will need to change the Distribute By from “Qty” to “Amt”, then click on the “Copy Line 1 Project(s) and Activity(s) to All Lines**”** button (see Splitting Projects section on page 31).

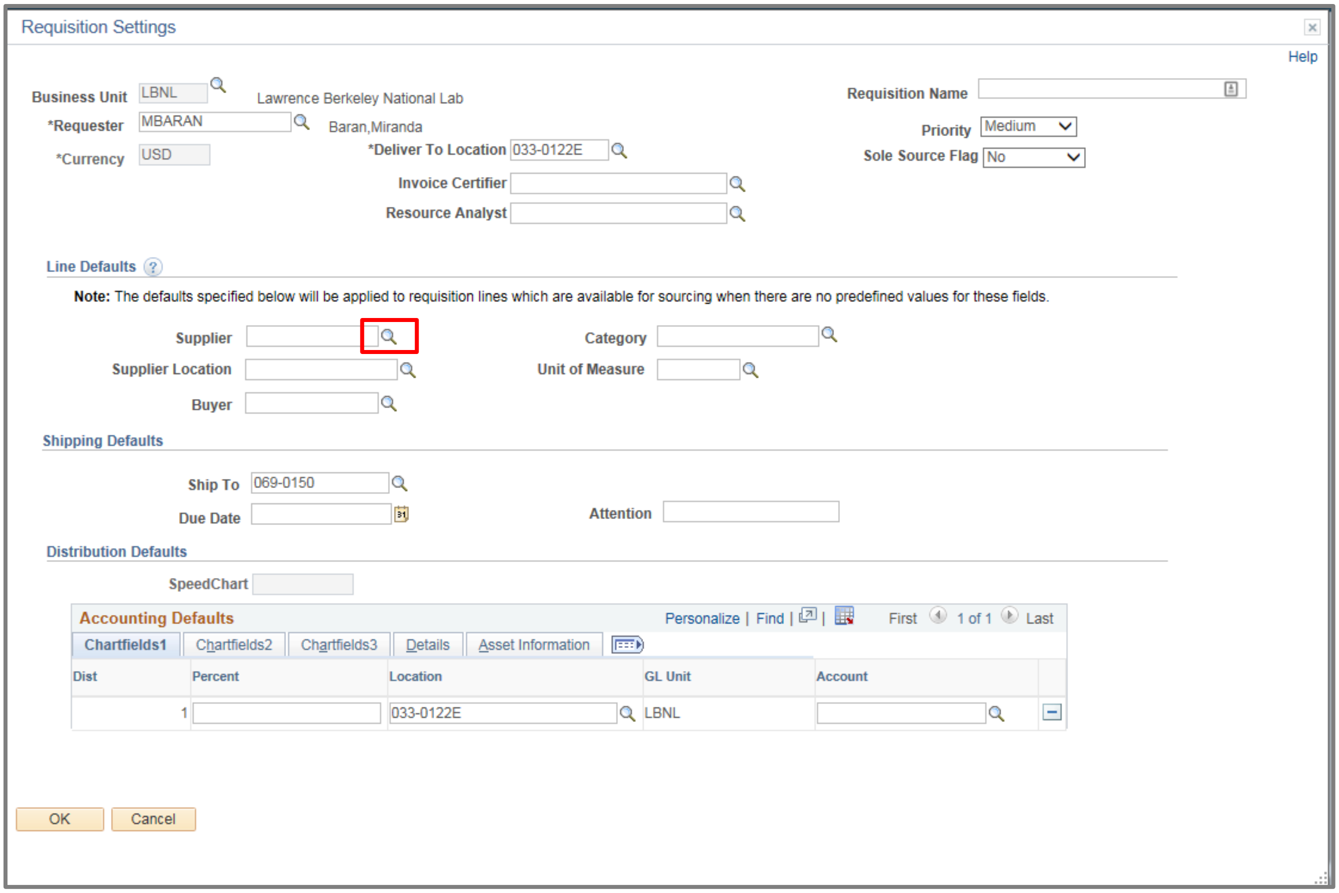
Continue the checkout process to save and submit the requisition.

Copying Other Data to Multiple Lines

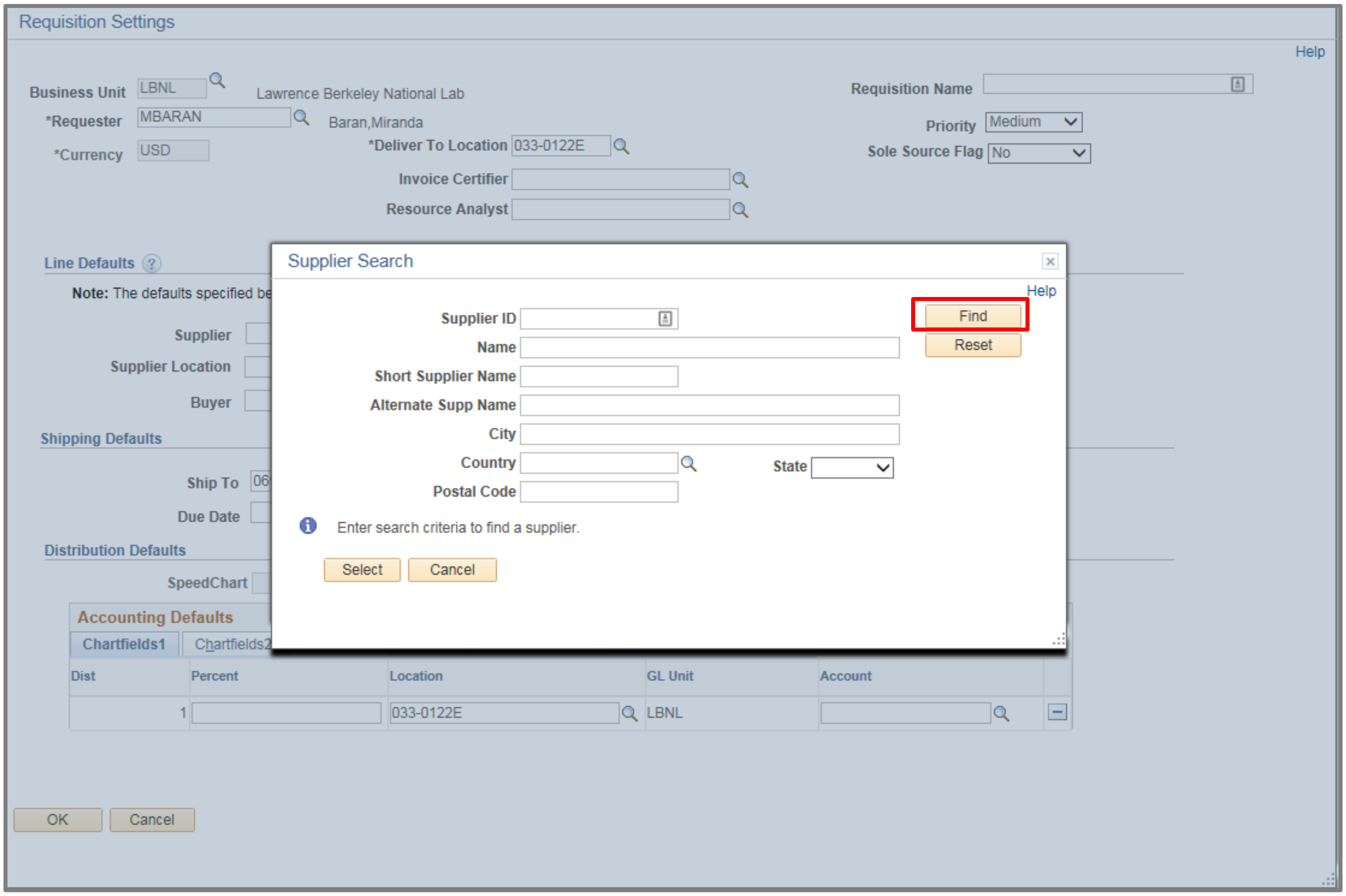
To copy data besides the Project/Activity/Work Order to multiple lines on your requisition, use the Requisition Settings function. This can be used for fields such as the Supplier, Ship To, Due Date, and Attention information when you want ALL the lines to have the same information.

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



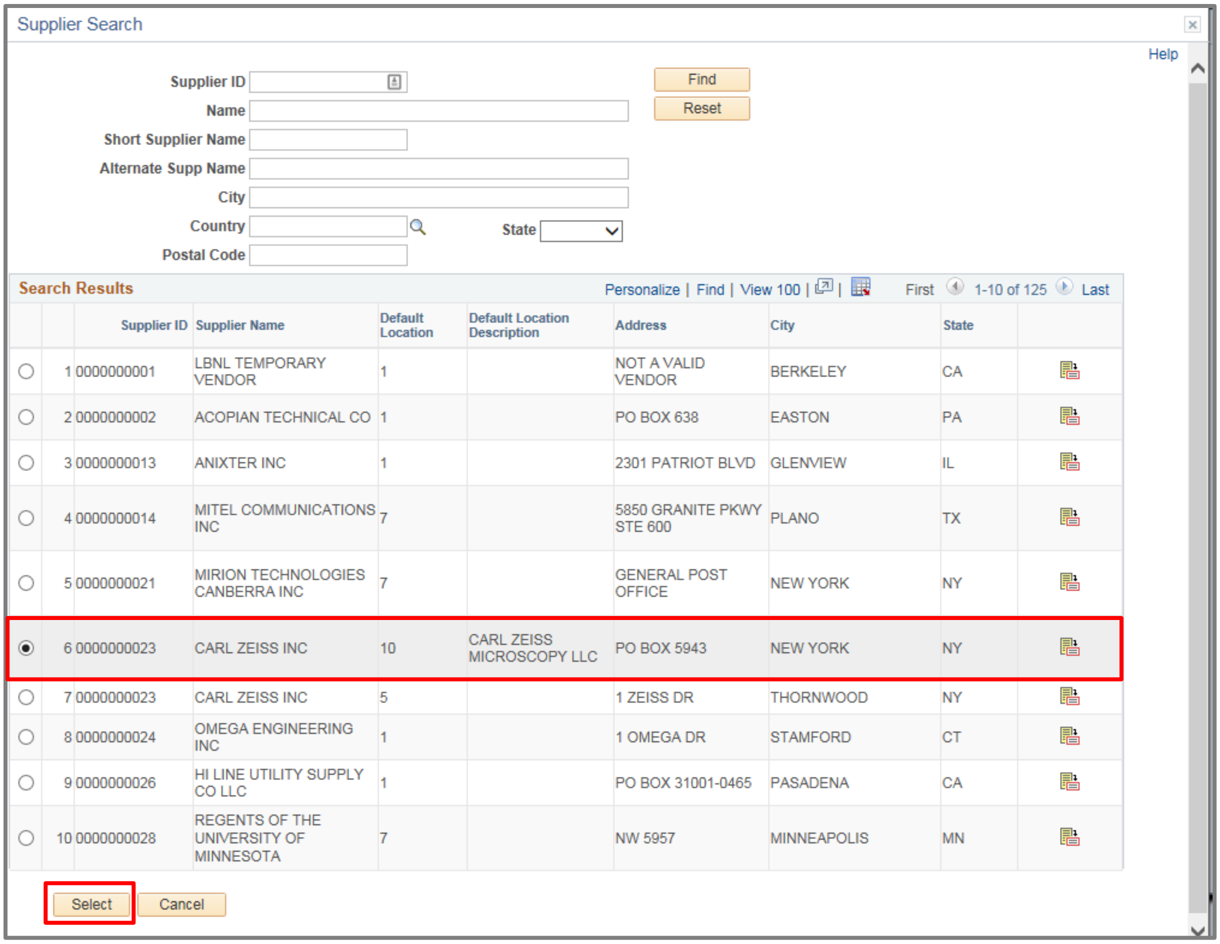


To find a Supplier, click on the magnifying glass next to Supplier:



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 Search

Help

Supplier ID
Name
Short Supplier Name
Alternate Supp Name
City
Country
State
Postal Code

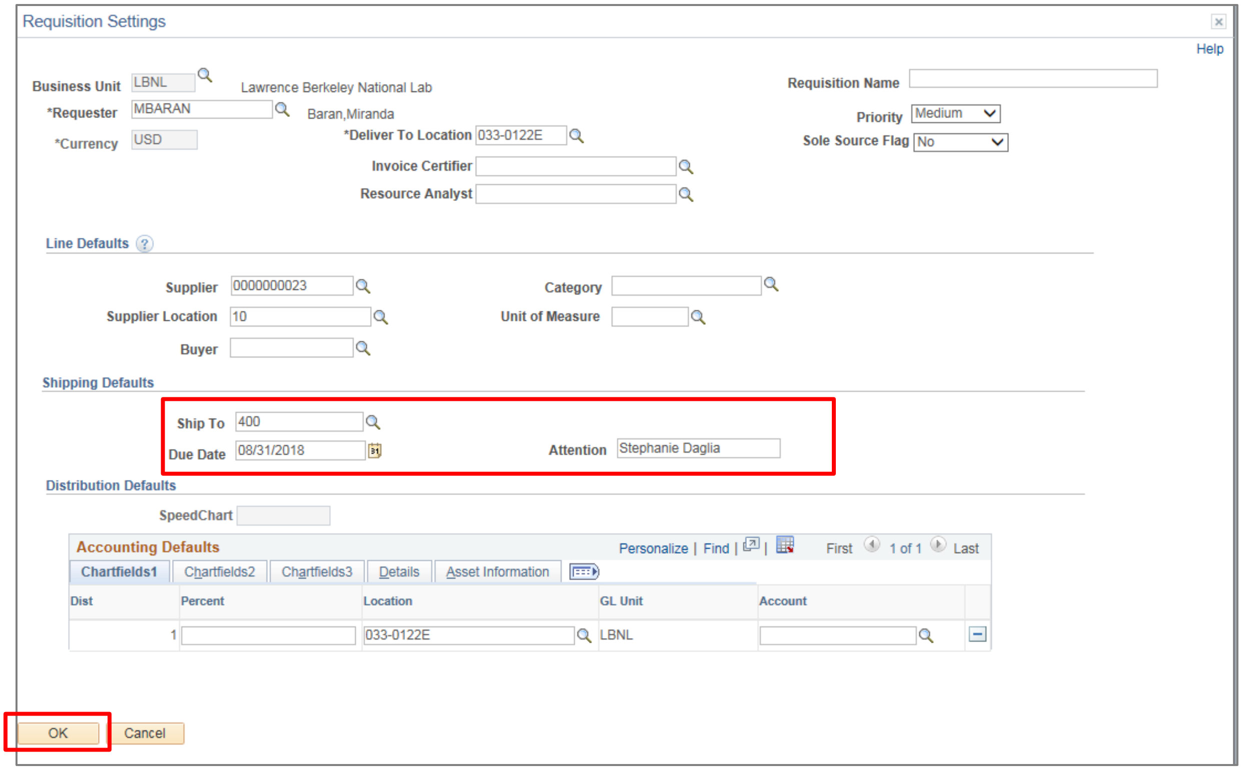
Find
Reset

Search Results — Personalize | Find | View 100 | First 1-10 of 125 Last

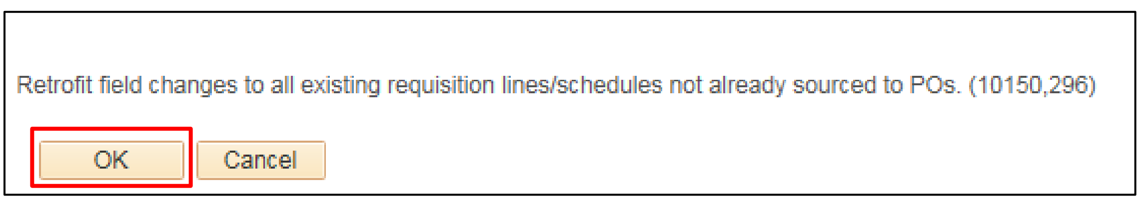
		Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
○	1	0000000001	LBNL TEMPORARY VENDOR	1		NOT A VALID VENDOR	BERKELEY	CA
○	2	0000000002	ACOPIAN TECHNICAL CO	1		PO BOX 638	EASTON	PA
○	3	0000000013	ANIXTER INC	1		2301 PATRIOT BLVD	GLENVIEW	IL
○	4	0000000014	MITEL COMMUNICATIONS INC	7		5850 GRANITE PKWY STE 600	PLANO	TX
○	5	0000000021	MIRION TECHNOLOGIES CANBERRA INC	7		GENERAL POST OFFICE	NEW YORK	NY
◉	6	0000000023	CARL ZEISS INC	10	CARL ZEISS MICROSCOPY LLC	PO BOX 5943	NEW YORK	NY
○	7	0000000023	CARL ZEISS INC	5		1 ZEISS DR	THORNWOOD	NY
○	8	0000000024	OMEGA ENGINEERING INC	1		1 OMEGA DR	STAMFORD	CT
○	9	0000000026	HI LINE UTILITY SUPPLY CO LLC	1		PO BOX 31001-0465	PASADENA	CA
○	10	0000000028	REGENTS OF THE UNIVERSITY OF MINNESOTA	7		NW 5957	MINNEAPOLIS	MN

Select
Cancel

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."



Click on "OK" in the window that opens.



Click on "OK" again to copy the information.

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

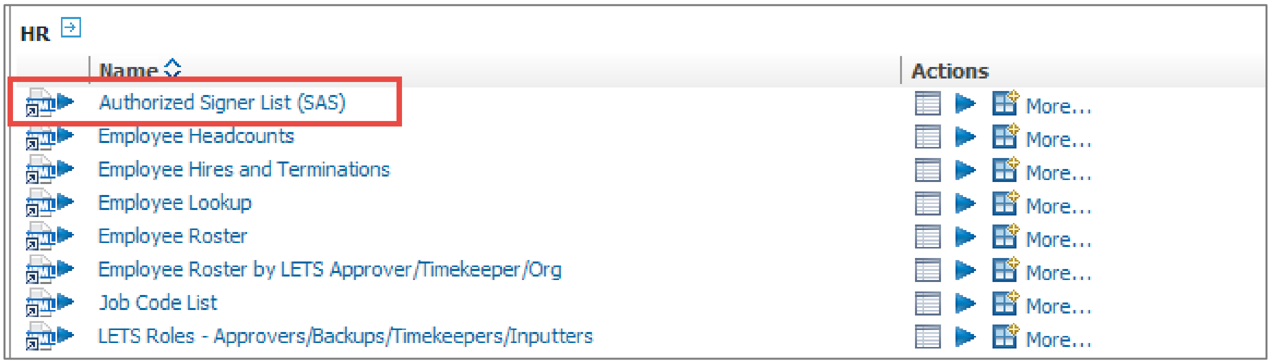
(The Status can also say PO Created, PO Dispatched, Received, Denied, or Canceled.)

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 Procurement Manager 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 Cognos under the "HR" heading.



LBNL RPM on Signature Authority for Financial Transactions provides policy on signature authorization and requirements.

The *Delegation of Signature Authority* 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.

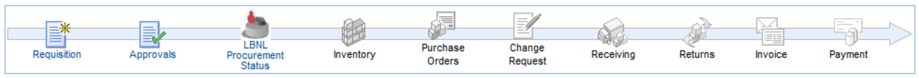
All employees with signature authority must successfully complete a standard online training course, provided by the Office of the CFO. See the Signature Authority Guidelines webpage.

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 *LBNL RPM section on Invoice Certifications* 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 SAS Dollar Amount Approval, 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 Division Approval, 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 Division Project Approval, 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 OCFO Division Management Approval, 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 and 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 http://fms.lbl.gov.
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-in 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 *Manage Requisitions* 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	A master agreement is not a contract, although it establishes a general scope of work and the terms and conditions under which the Laboratory and subcontractor agree to do business. In most cases, pricing is agreed to, but is not considered mandatory. Master agreements are not funded and therefore do not create an obligation to the Laboratory. They may be issued for Laboratory-wide use. 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 **On-Site Services**	*Off-Site Services* are services performed at a location other than a Berkeley Lab/DOE site. *On-Site Services* 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) / Subcontract	A Purchase Order (also called a PO or subcontract) is a document sent to a 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 *Restricted Item List*, 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 *Sole Source Justification* form is required for:
	
	• Non-competitive procurement for any product or service over $250,000. It is not required:
	    o For consulting services
	    o 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:
	    o 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
	    o 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 *Manage Requisitions* screen in the "Requisition State" column: Open: A requisition has been created and saved but not submitted for approval for further processing. Pending: A requisition was submitted to an approver using the ePro "Save & Submit" button and is awaiting approval. Approved: 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. PO Created: A PO has been created but not yet Dispatched (sent to the supplier). PO Dispatched: The PO was placed/sent to the supplier. Received: Some of the items on the PO may have been formally received at LBNL Receiving. Canceled: 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 *Manage Requisitions* 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: Open: The PO was created but probably not yet placed / dispatched /sent to the supplier. Approved: The PO was approved by the buyer and should automatically change to *Dispatched* status within 20 minutes. Dispatched: The PO was placed / sent to the supplier. Complete: 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. Canceled: 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 *Request for Consultant/Personal Services Agreement* 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 *LBNL RPM on Consultants to Berkeley Lab, Hiring*.

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.