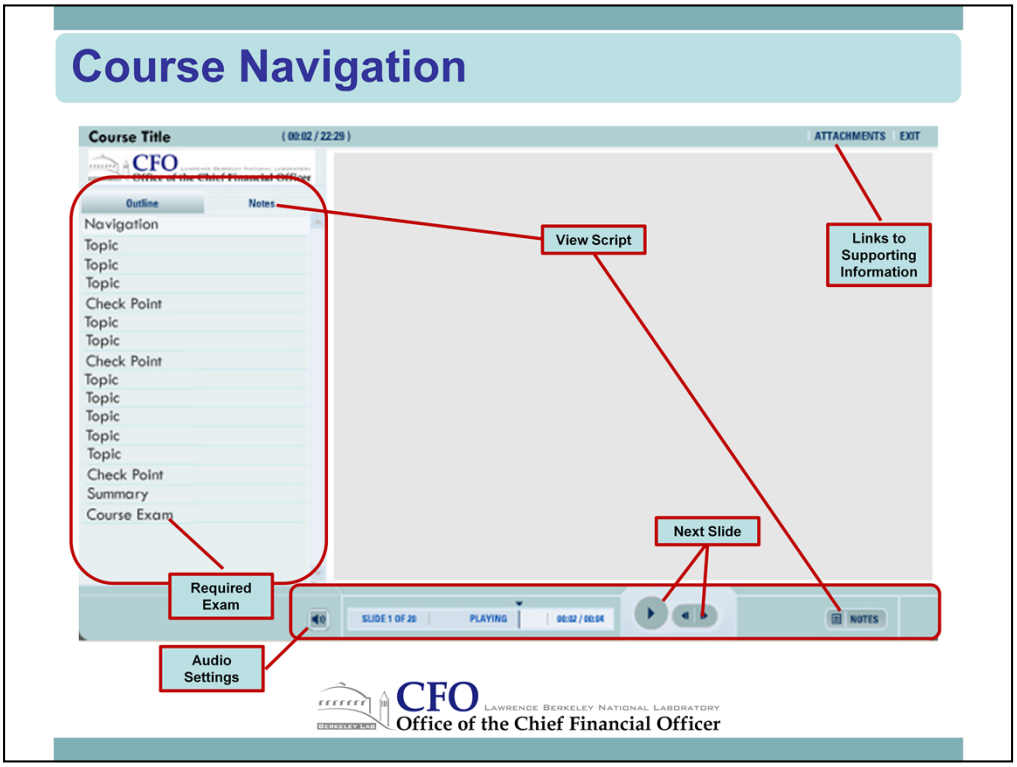
Welcome to your Lawrence Berkeley National Laboratory Technical Representative Training course.

This eLearning course provides you with the information needed to create a requisition in eProcurement. It is separated into two modules: the first covering requisition concepts and the second covering how to create a requisition in the eProcurement system. Module 1 will cover definitions and policies regarding Item Category Codes, Restricted Items, Government Furnished Property and Subcontractor Acquired Property, Sole Source Subcontracts, Onsite Services, Approval Thresholds, and Separation of Requester and Approver.

Module 2 will cover navigating to eProcurement's requisition creation section, the three steps in the requisition creation process, how to create and submit a purchase requisition, and how to access previously submitted and/or saved requisitions.

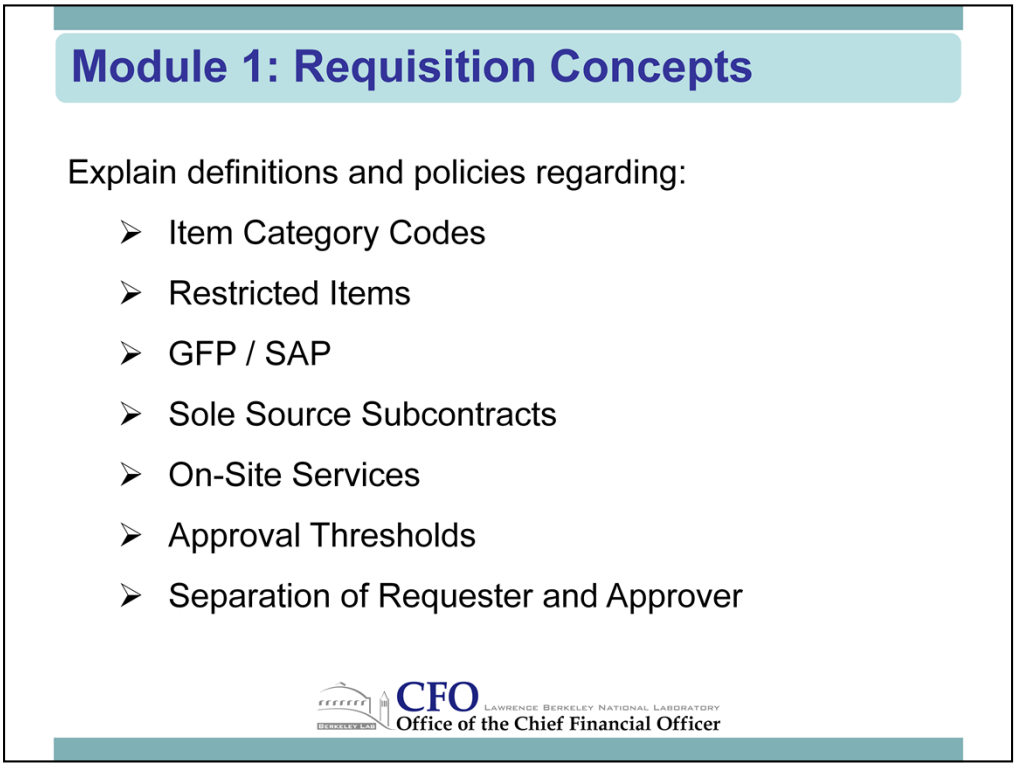
Throughout this course, you will have the opportunity to check your understanding of the information presented through periodic unscored check point quizzes. Successful completion of the end-of-course exam is required for you to obtain credit for this training. When you complete the exam, you will be asked for your employee number so that your training records can be updated.



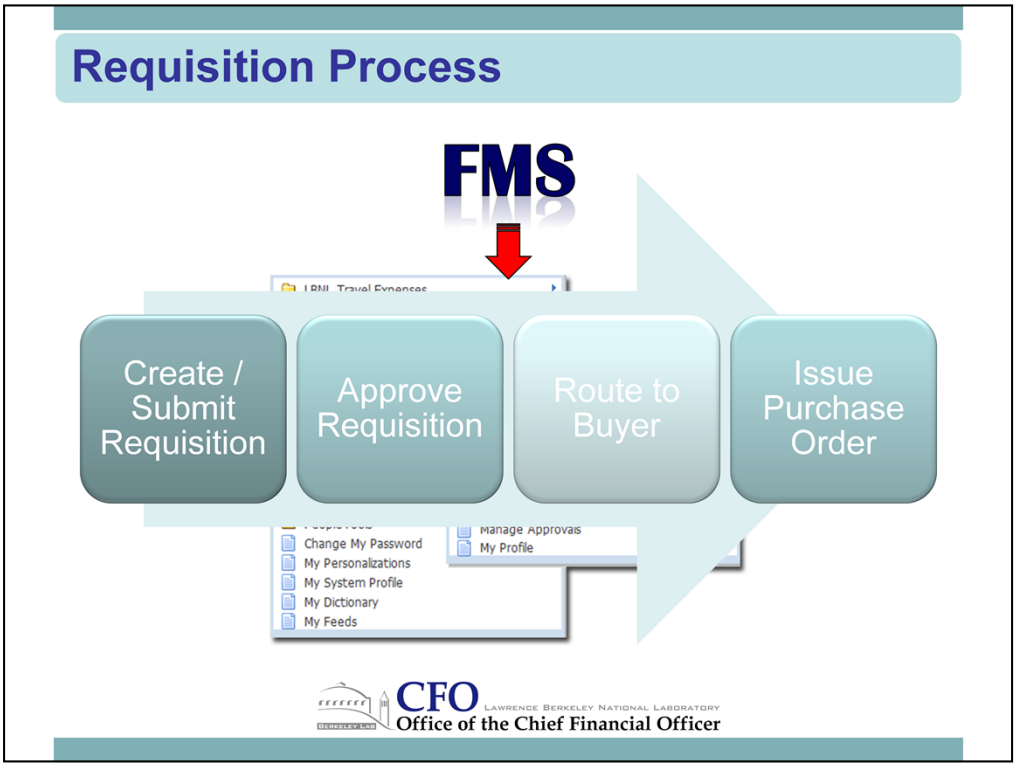
Before we begin, let's briefly review the course navigation options. At any time, you can control the playback of the course using the navigation bar at the bottom of the screen. You can also jump to specific areas in the course by clicking the module and section titles shown on the left side of the screen. If you want to read along with the narration of the course, click either one of these **Notes** options. Your audio settings can be changed here. Many slides in the course will require your action to move forward to the next slide. You can do so using these buttons. Often times the course will refer to additional reading material and helpful links. These items are available through the **Attachments** tab at the top of the course window.

Although this course is self-guided, you are required to complete the end-of-course exam to obtain credit for this course. You can start the course exam at any time by clicking that option in the menu on the left side of the screen. If you don't have time to complete this course in one sitting, that's ok. You can exit the training at any time, and the next time you launch it, you will be able to resume the course where you stopped it.

So, let's get started!

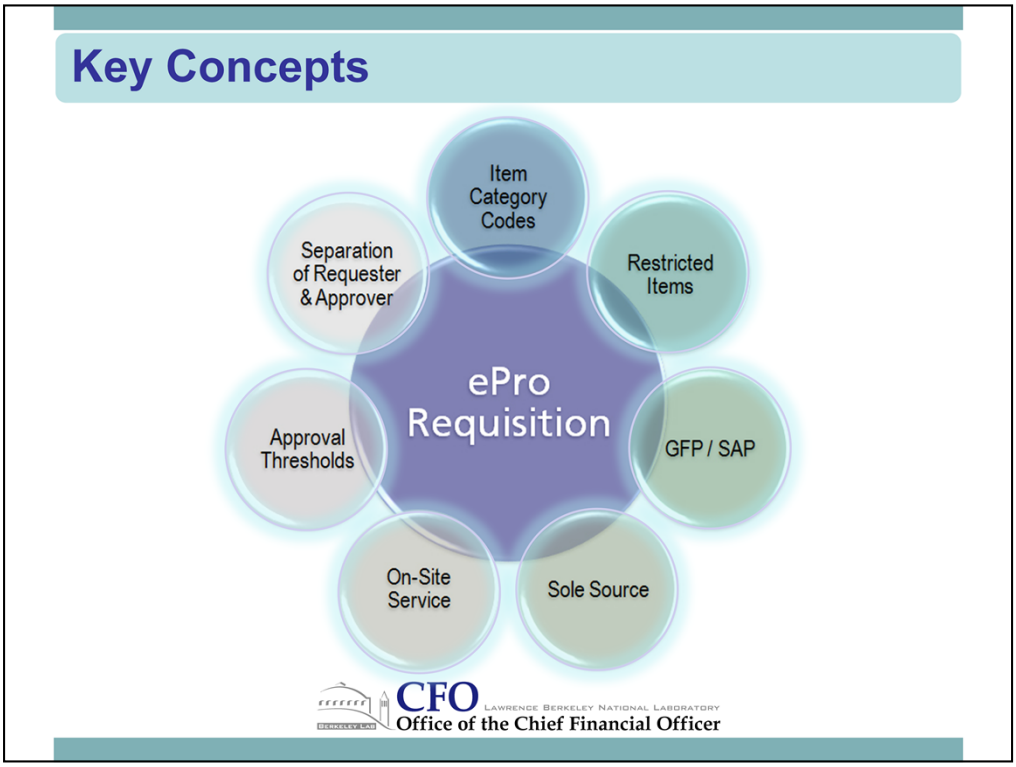


In Module 1, we will cover these purchase requisition concepts. Click the **Next** button on the player bar to begin.



eProcurement (ePro) is part of LBNL's Financial Management System (FMS) and is used for processing the Lab's purchases. ePro requisitions are used to request unique goods and services that are not available from eBuy or B2B vendors. Only trained ePro Requisition Preparers can create ePro requisitions. Once an ePro requisition is created, it may be submitted (depending on the approval threshold set by the division) to an Authorized Signer 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 vendor for the goods or services. ePro sends email notifications to requesters regarding the status of their requisitions. You can additionally view requisition/order status on-line in IRIS, BRS, and in ePro’s Manage Requisitions screen.

Before we delve into this process any further, we need to first review the key concepts and requirements for creating a requisition. Once we've done that, we'll go over how to create and submit a requisition.



The key concepts that you should be intimately familiar with prior to creating a requisition are:

Item Category Codes: you'll need to know how to identify and select them as well as what the significance is of choosing the most appropriate ones

Restricted Items: you'll need to know what restricted items are and how to obtain the most up to date list of restricted items

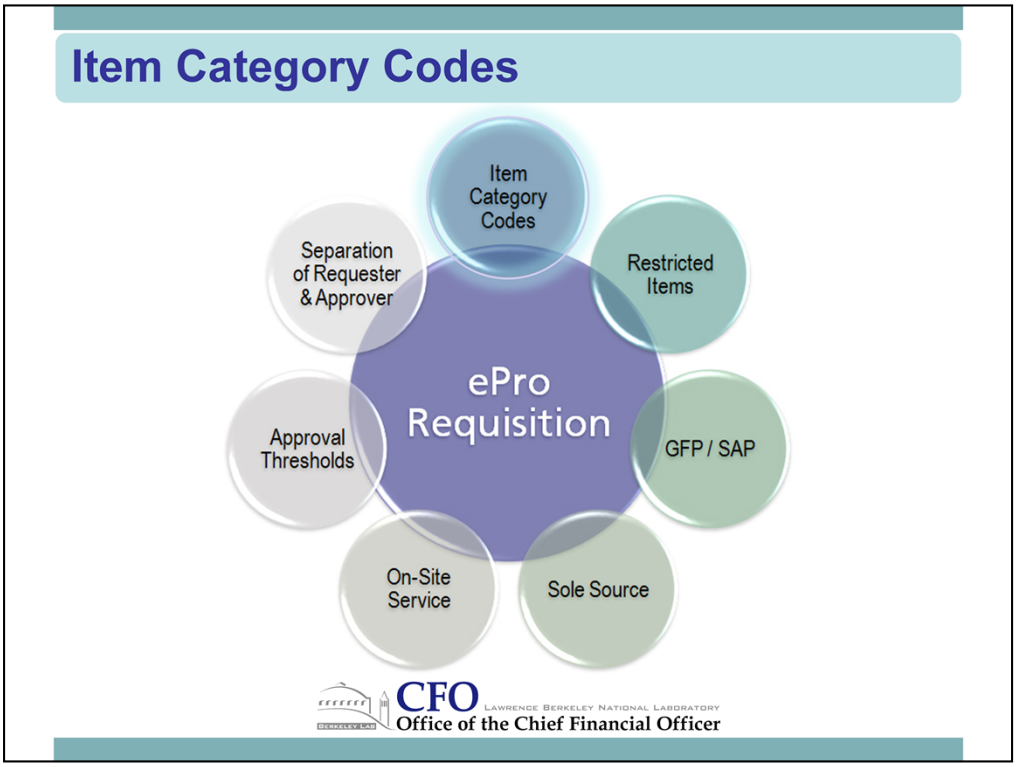
GFP/SAP: Government Furnished Property and Subcontractor Acquired Property. You'll need to identify which items fall under these categories.

Sole Source: Sole Source is necessary in some situations. You will need to identify those situations and then provide a justification within your requisitions.

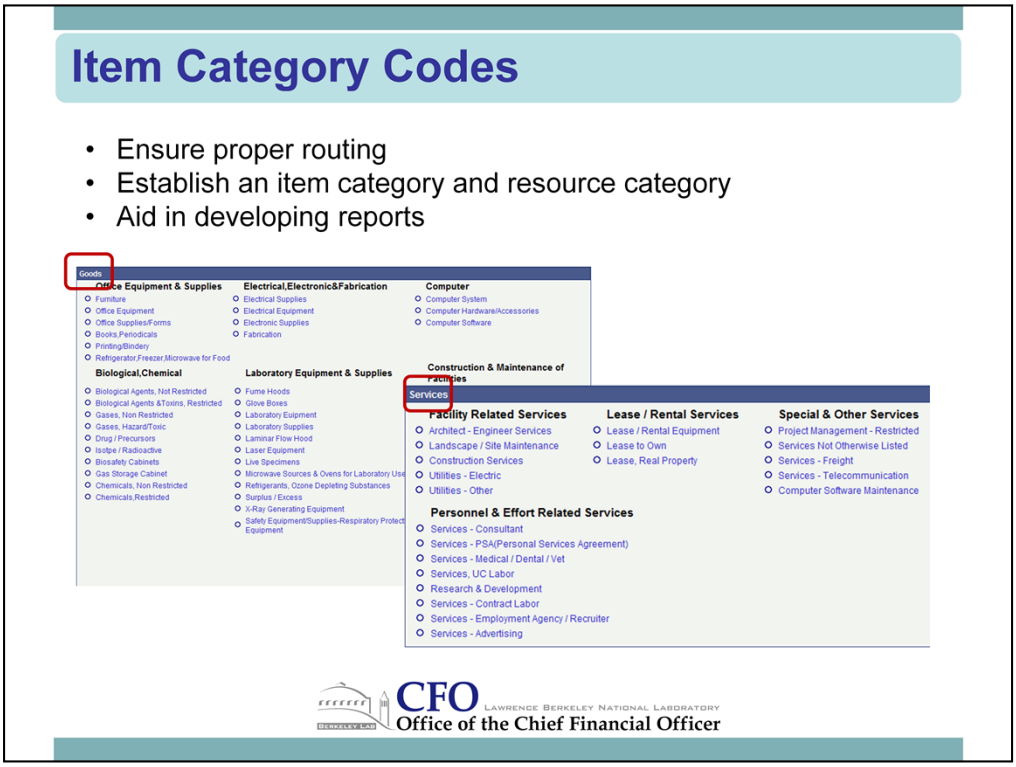
On Site Services: You will need to specify when services will be performed on site and then you'll need to determine which type of onsite service is being provided.

Approval Thresholds: Different divisions have different approval thresholds. You'll need to be familiar with the approval threshold of your division and determine an approver for requisitions that surpass the threshold.

Separation of Requester and Approver: You need to be familiar with the approval policies, in particular those mandating that the approver and requester cannot be the same person for one requisition.



So let's talk about Item Category Codes. As the name suggests, these are codes that determine what category an item is in. But why do we care?



Item categories and codes are integral to the requisition creation and routing process. Item category codes ensure proper routing by enabling Procurement managers to assign requisitions to the appropriate people. They also establish an item category and a resource category for the item being purchased, as well as aid in developing reports. There are different item categories and codes based on whether the item being purchased is a good or a service.

An item is a good if it is a tangible item that is manufactured or produced for sale. A service is useful labor that does not produce a tangible product or good. Services engage the time and effort of a subcontractor to perform an identifiable task rather than to furnish an end item of supply.

Item Categories - Goods
Office Equipment & Supplies
Biological / Chemical
Electrical, Electronic, & Fabrications
Laboratory Equipment & Supplies
Computer
Instructions
Click the tabs on the left to explore the Goods Categories and the types of items included in them.
* Goods Categories are subject to change without notice.
PROPERTIES
Allow user to leave interaction: Anytime
Show 'Next Slide' Button: Don't show
Completion Button Label: Next Slide
Properties...
Edit in Engage

Item Categories - Services
Facility Related Services
Lease / Rental Services
Personnel & Effort Related Services
Instructions
Click the tabs on the left to explore the Services Categories and the types of items included in them.
* Services Categories are subject to change without notice.
PROPERTIES
Allow user to leave interaction: Anytime
Show 'Next Slide' Button: Don't show
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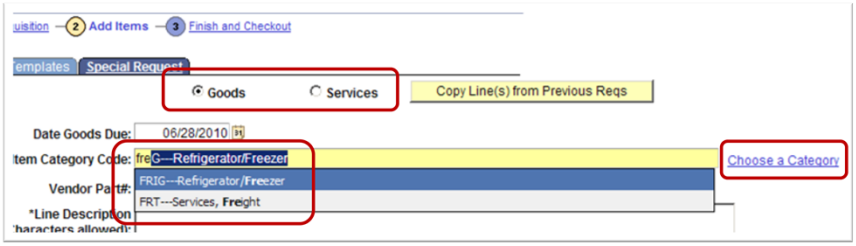
Properties...
Edit in Engage

Item Categories List

- Specify whether your item is a good or service.
- eProcurement provides a listing of the relevant categories.



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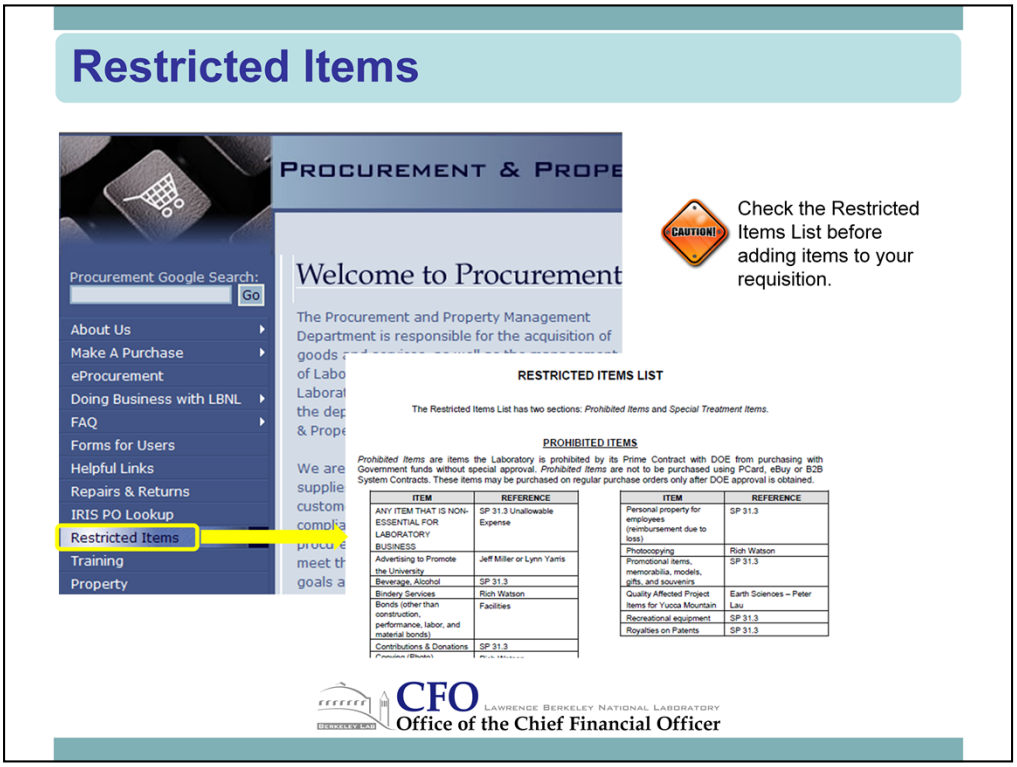
As we will see later in this training, when entering a requisition in eProcurement, you will be able to choose an item category code by either typing part of the item name or by clicking a link that will display the categories according to whether you selected Goods or Services for the item. The key thing you need to know about Item Category Codes before attempting to create a requisition is that you must, at a very minimum, be able to determine whether your item is a good or a service. Once you've done that, the onscreen queues will help you to choose the most appropriate code. With that said, you should make it a practice to consult the list of Item Category Codes in eProcurement to ensure your requisition will be routed efficiently after you submit it.

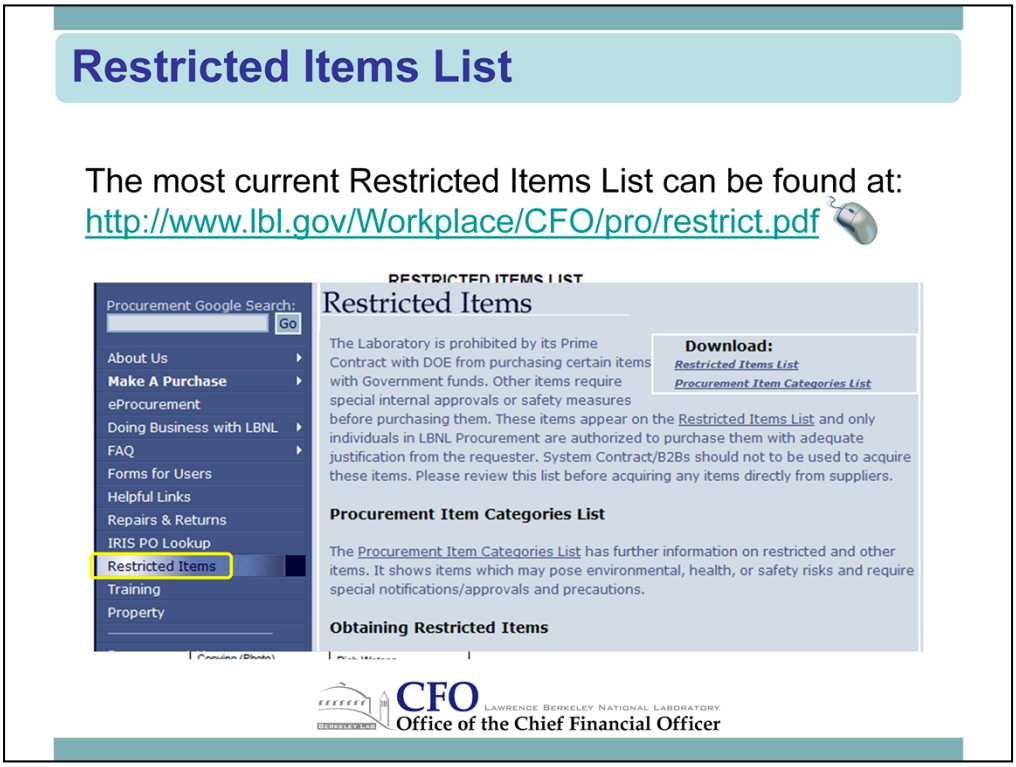
Now let's talk about Restricted Items

Items in the Item Categories List that are displayed in orange text are restricted items. There are many types of restricted items such as computers, furniture, services, etc. A restricted item is anything that has inherent safety hazards, requires special controls and/or authorizations, or if handled improperly, may: be harmful, damage equipment or result in citations or Department of Energy Reportable occurrences.

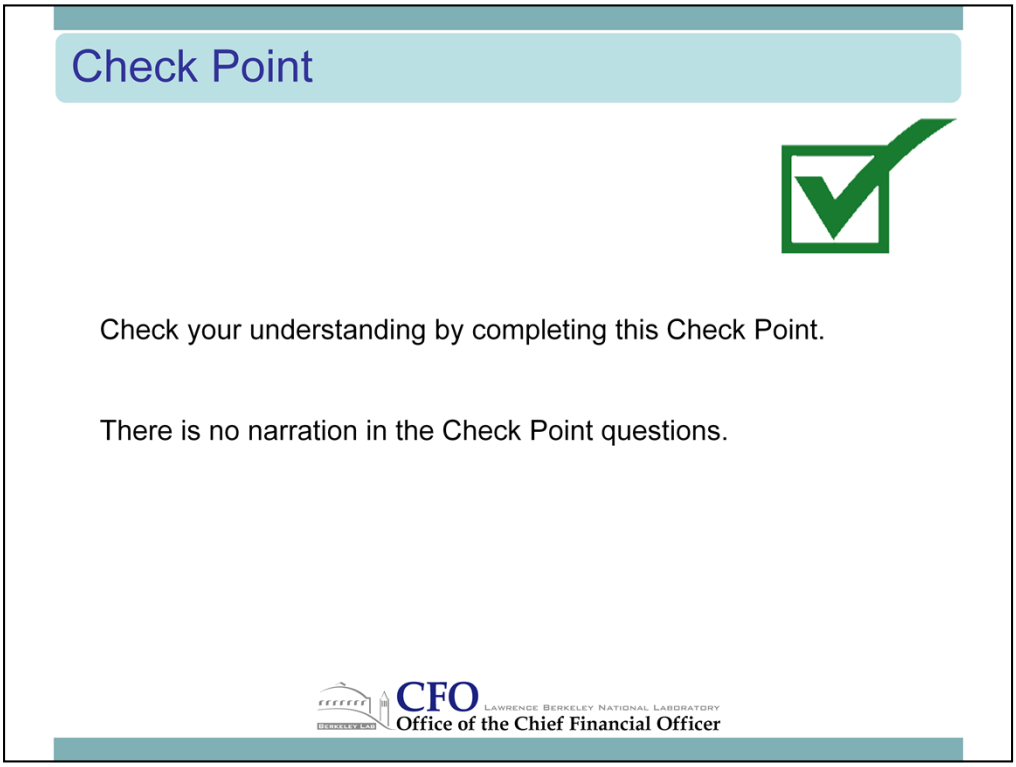


For these reasons, purchases of Restricted Items need to be controlled. These items appear on the Restricted Items List and only individuals in LBNL Procurement are authorized to purchase them with adequate justification from the requester. You can create a requisition for any item on the Restricted Items list. However, if you do request one of these items, your requisition may require notification or special approval.

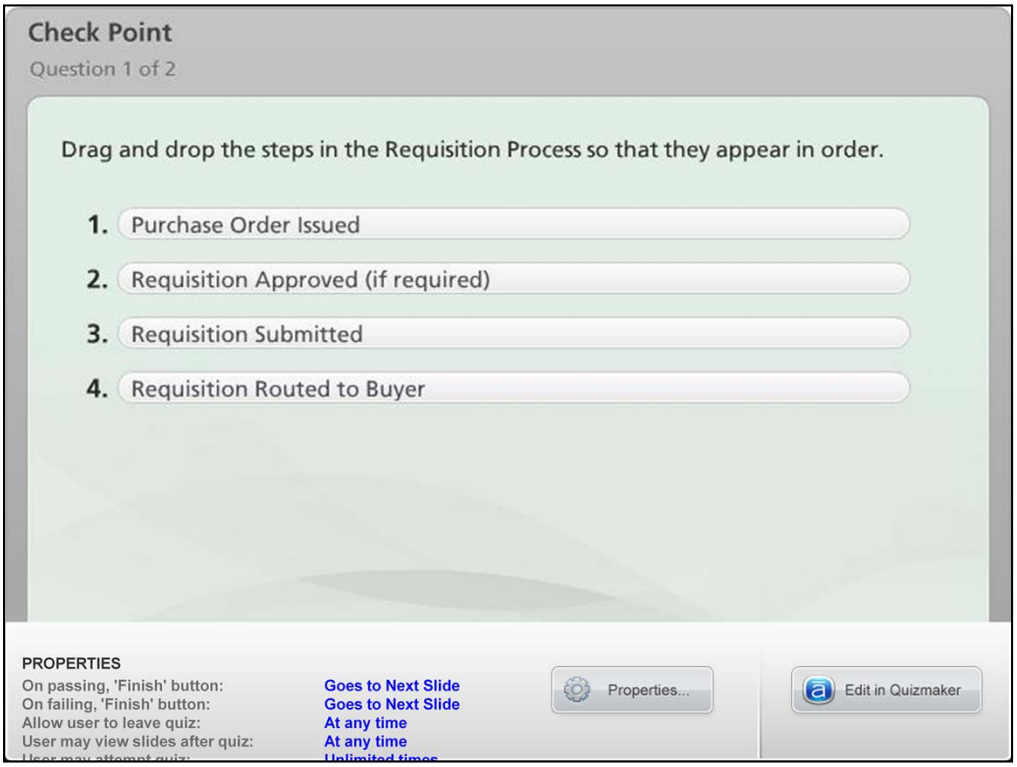
If the Item Category Code you choose on a requisition is for a restricted item, the requisition will be flagged. The requisition may require notification or it may be routed to someone who is authorized to approve or deny the purchase of the restricted item. Hence the importance of choosing the right Item Category Code.

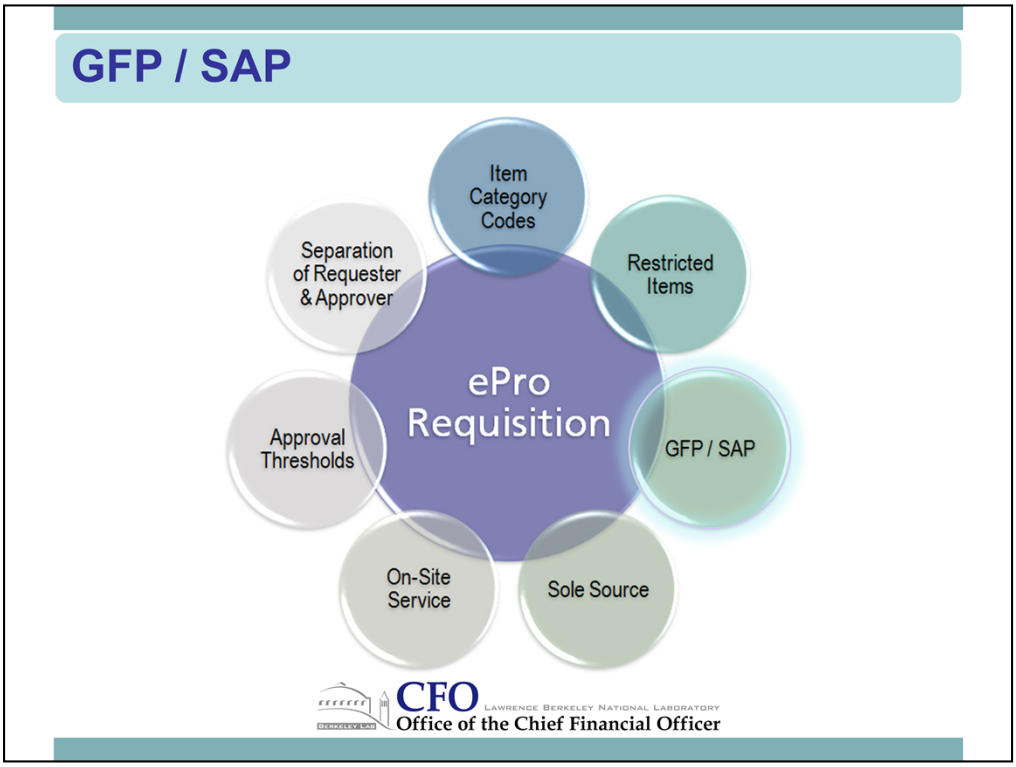


Just like the list of Item Category Codes, the Restricted Items List may be updated at any time. You can access the most current Restricted Items list at http://www.lbl.gov/Workplace/CFO/pro/restrict.pdf or by accessing the Restricted Items option from the Procurement and Property Management web site.

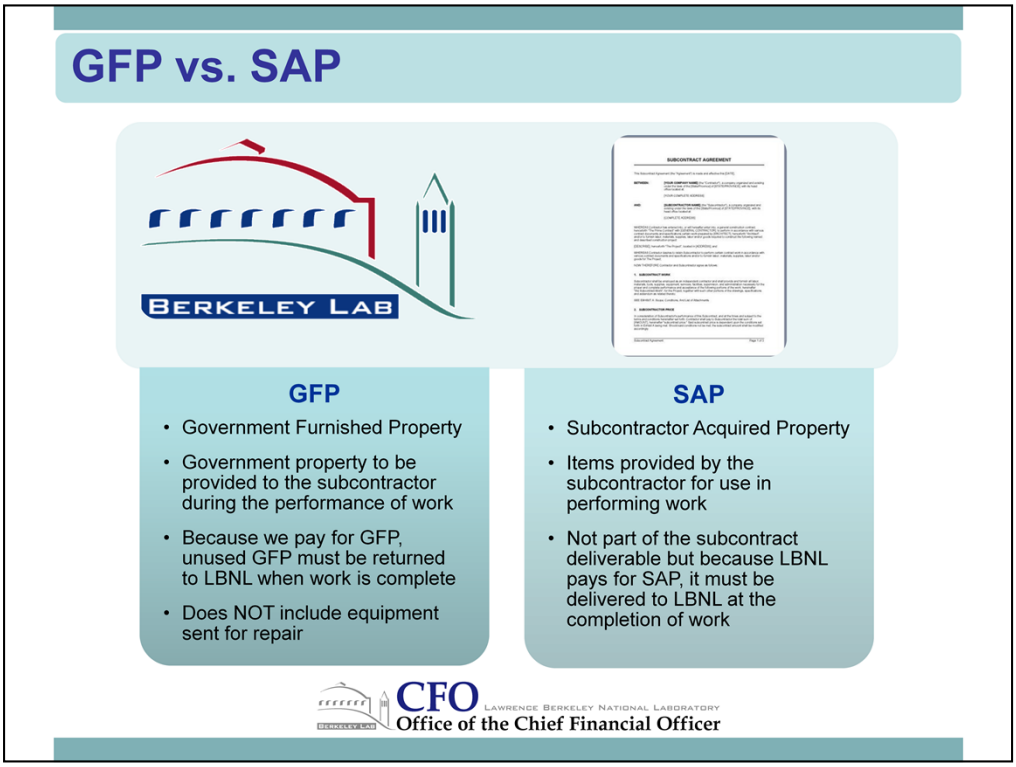


Let's take a moment to check your understanding of the information provided so far in this course by answering just a few questions in this Check Point. No narration accompanies the Check Point questions. Click the button on the player bar when you are ready to start.


Check Point
Question 1 of 2
Drag and drop the steps in the Requisition Process so that they appear in order.
1. Purchase Order Issued
2. Requisition Approved (if required)
3. Requisition Submitted
4. Requisition Routed to Buyer
PROPERTIES
On passing, 'Finish' button: Goes to Next Slide
On failing, 'Finish' button: Goes to Next Slide
Allow user to leave quiz: At any time
User may view slides after quiz: At any time
Properties...
Edit in Quizmaker

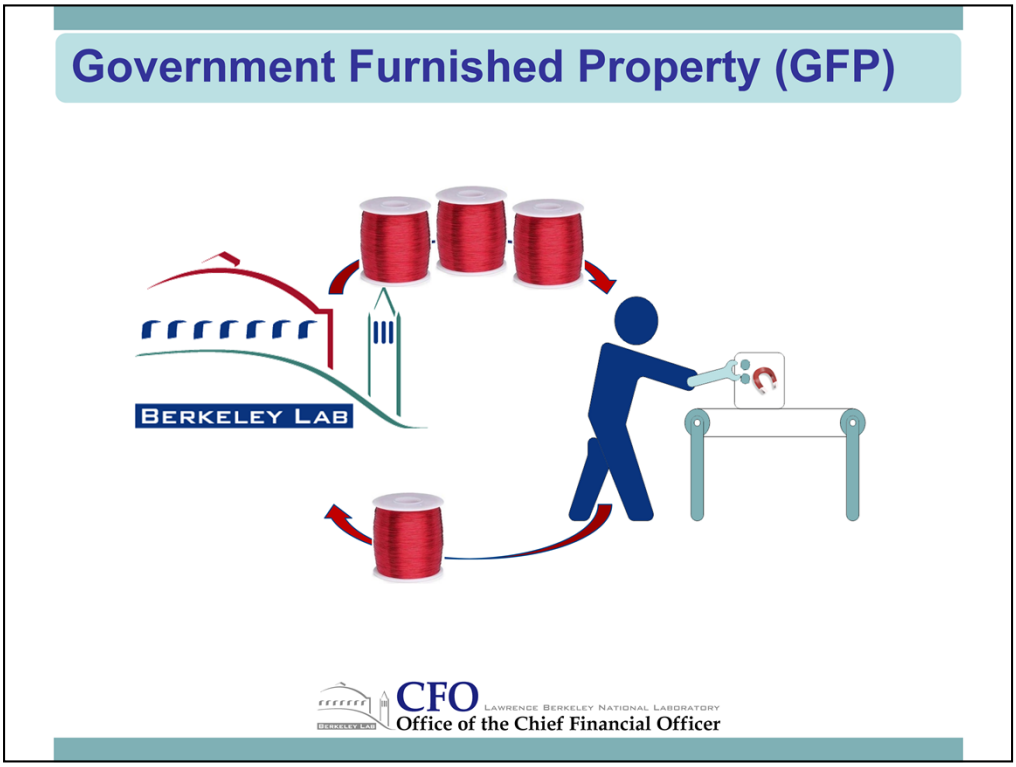


When creating a requisition, you will also need to know whether the items you are requisitioning include Government Furnished Property or Subcontractor Acquired Property.

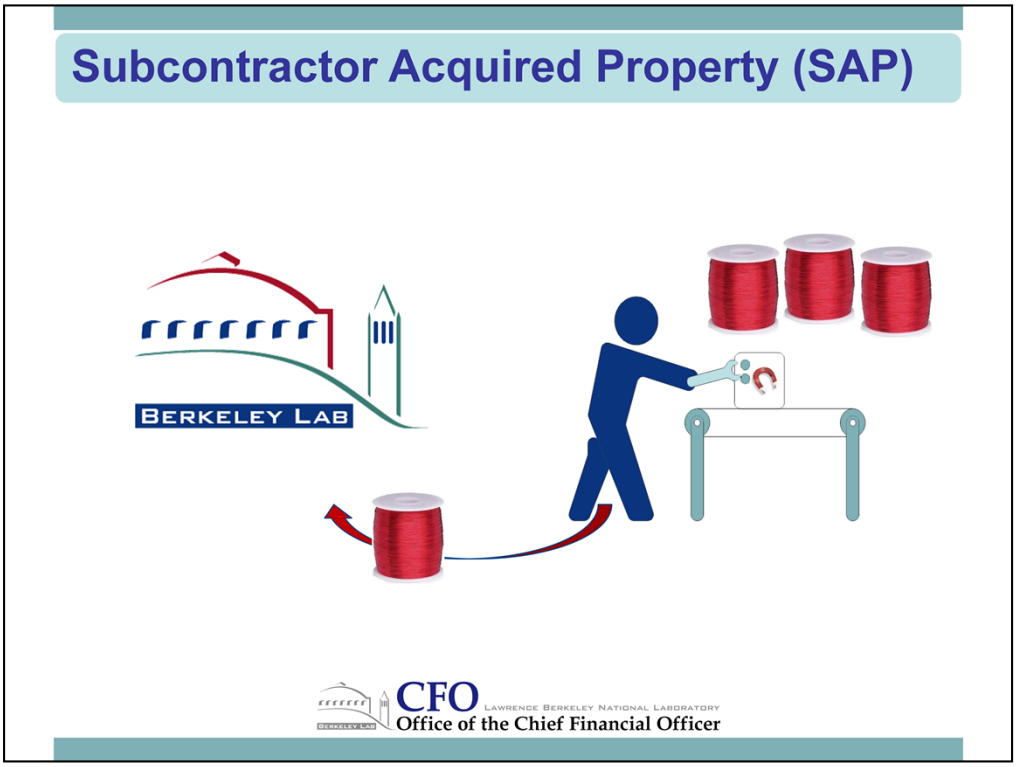


GFP: government owned property that will be provided to the subcontractor / vendor for use during the performance of work with the expectation that any unused portion will be returned to LBNL at the end of that work. Equipment sent out for repair is not considered GFP.

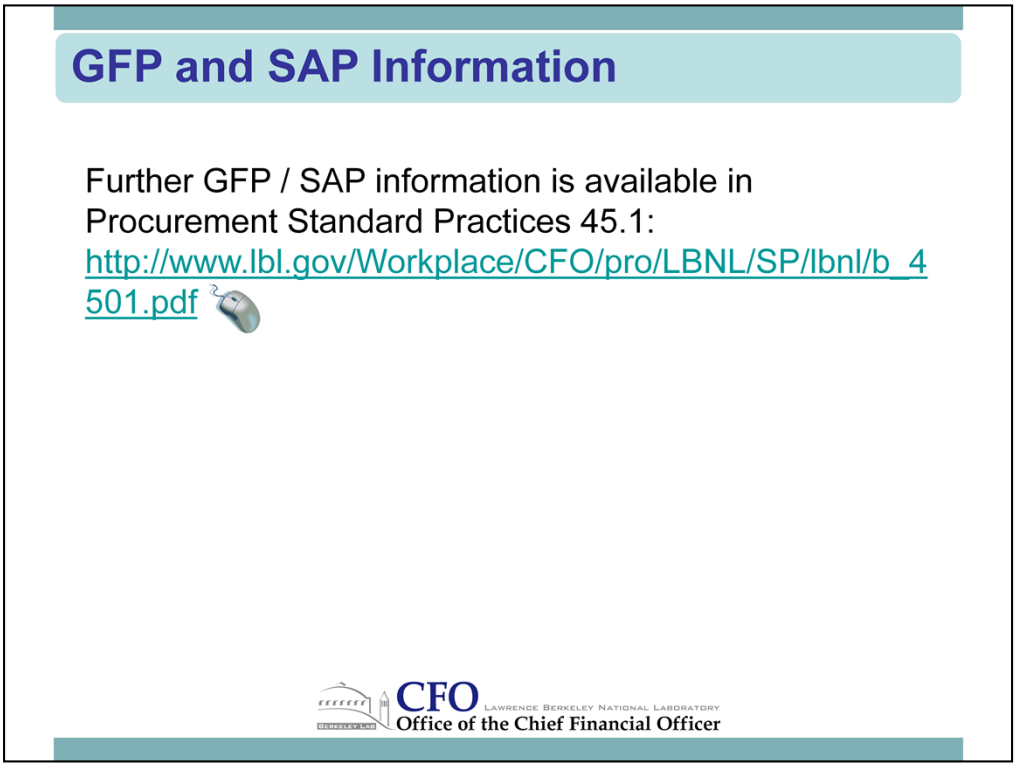
SAP: property that the subcontractor acquires, and LBNL pays for, that will be used in performance of the work. This property is not part of the subcontract deliverable, but will still be delivered to LBNL at the completion of the work.



Examples of purchases that involves GFP are when we send the subcontractor wire to install in a magnet they are fabricating and delivering to us or if we send them a piece of machinery to help them in fabricating an item they will be delivering to us. We would expect the Government Furnished Property (GFP)--the wire or machinery--to be returned to LBNL.

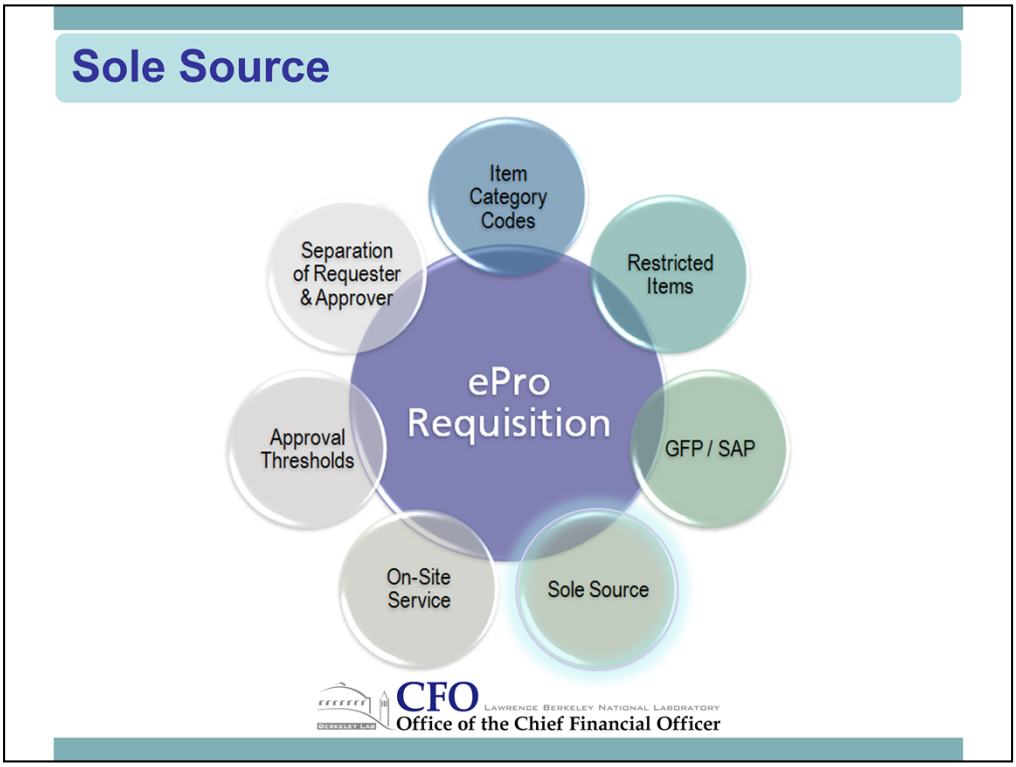


SAP: when the subcontractor buys a ton of wire to go into a magnet they are fabricating for us. If they only used half a ton of wire, but LBNL agreed to pay for the full ton, we would expect the subcontractor to send us the magnet ordered plus the leftover half ton of wire.

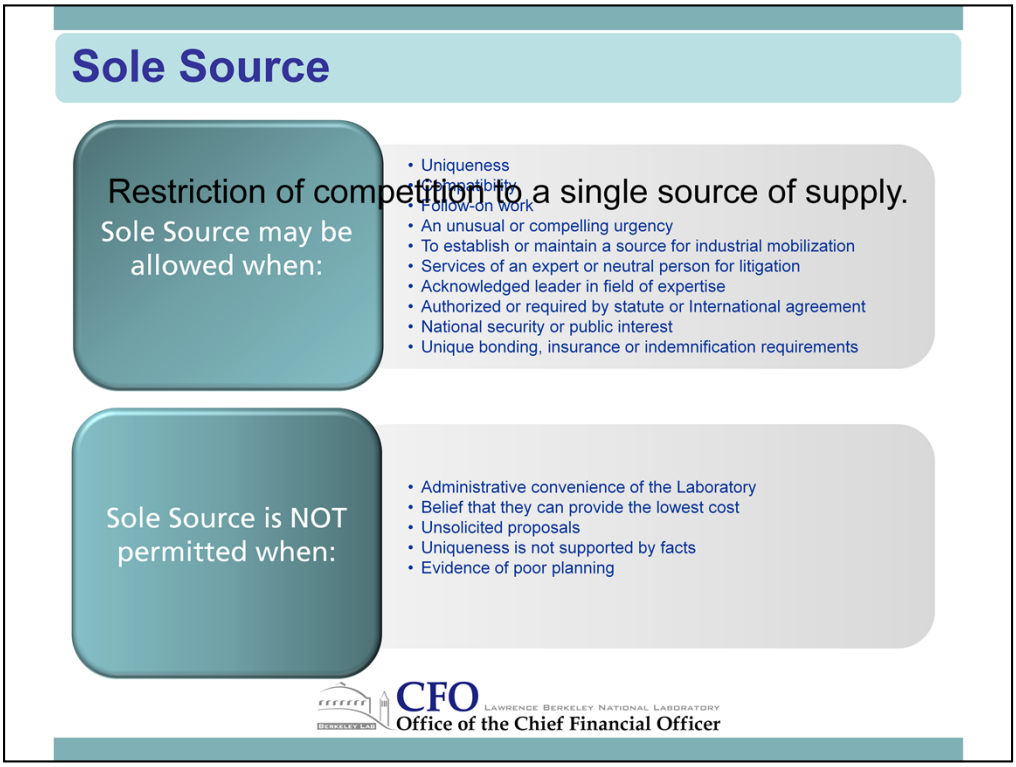


Further GFP/SAP information is located in Procurement Standard Practice 45.1.

The URL is: http://www.lbl.gov/Workplace/CFO/images/pro/prp/FAQ-GFP.pdf



In some cases, you may be required to enter a sole-source requisition. It's important that you understand the standard procedures regarding sole source subcontracts before entering a requisition.



Sole Source means that you are restricting competition to a single source of supply in your requisition.

A requisition may be restricted to a sole-source if the need to restrict competition can 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 specialized systems, 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;

•An unusual or compelling urgency that would cause an adverse or programmatic impact 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;

•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.

•Authorized or required by statute or International agreement;

•National security or public interest; or

•Unique bonding, insurance or indemnification requirements (applies if a Large Business is selected in lieu of a Small Business).

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

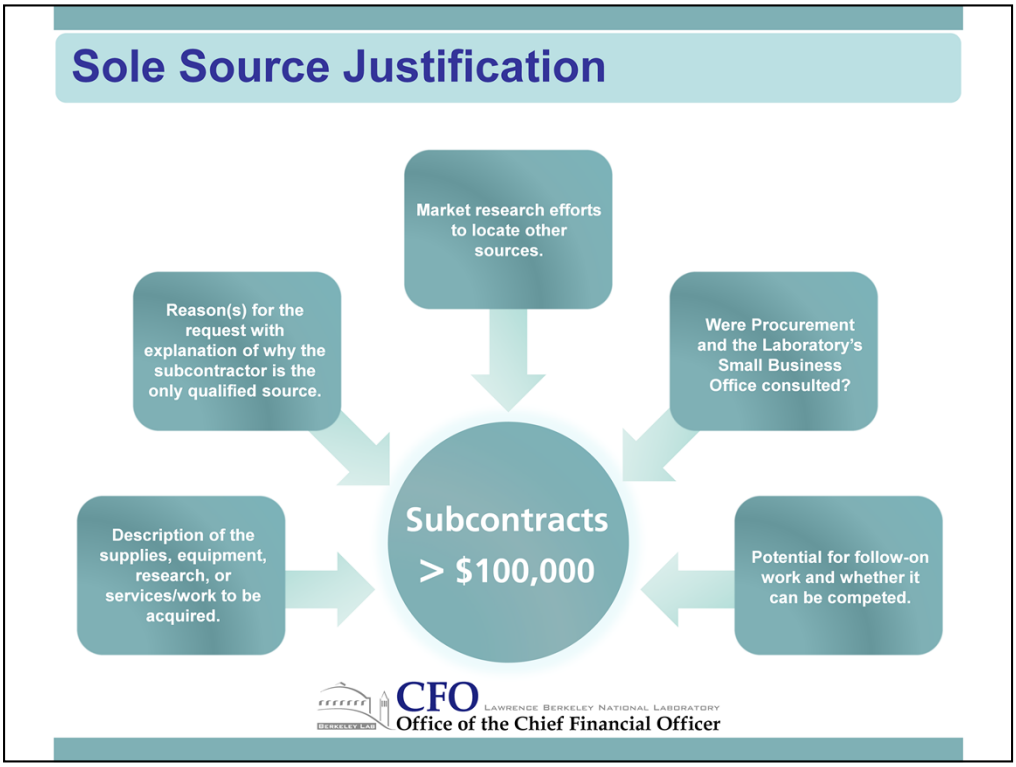
•Administrative convenience of the Laboratory;

•Belief by the requester that the sole-source subcontractor can provide the goods or services at the lowest cost;

•An unsolicited proposal, unless it provides unique approaches that are unavailable from other sources (see SP 15.9, Unsolicited Proposals);

•Contention that a subcontractor is uniquely qualified when such contention is not supported by facts but by opinions or assumptions; and

•Evidence of poor planning and if the action cannot pass the test of a valid non-competitive action.



A written sole-source justification must be in the procurement file for all sole-source subcontracts exceeding $100,000. The sole-source justification may be initiated by the requester or the procurement specialist, and both must work together to assure that the justification is appropriate and defensible.

The sole-source justification must address the following information, as applicable:

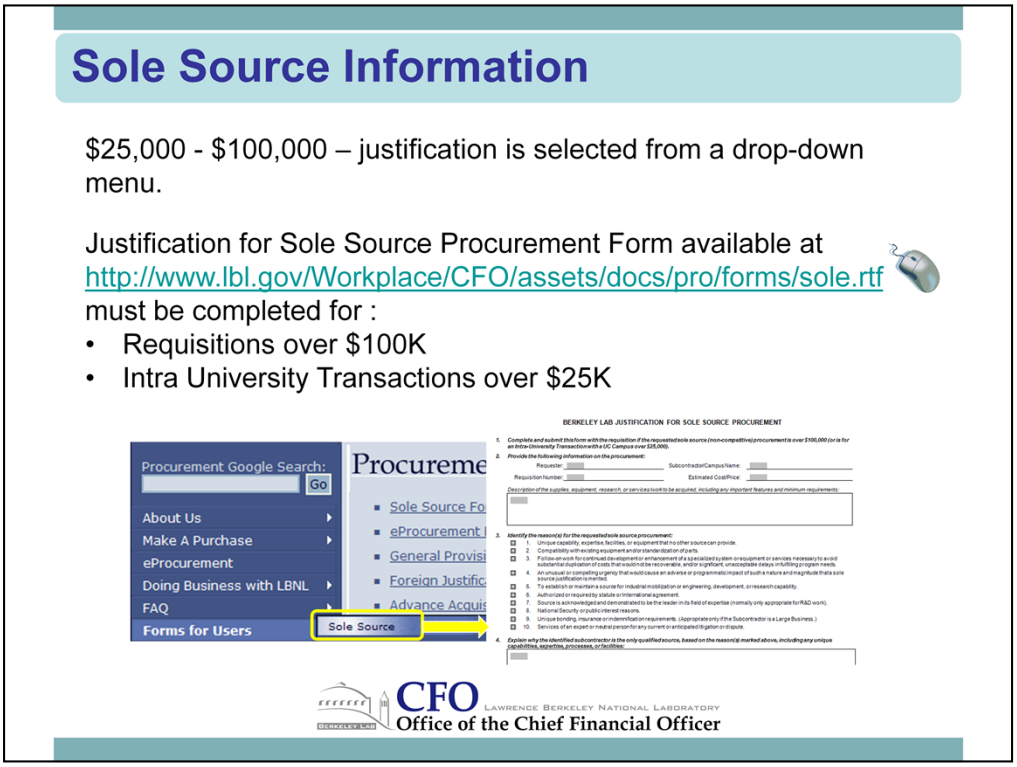
•A description of the supplies, equipment, research, or services/work to be acquired, including any important features and minimum requirements;

•The reason(s) for the request with a narrative explanation of why the subcontractor is the only qualified source, based on the identified reason(s), including any unique capabilities, expertise, processes, or facilities;

•Market research efforts to locate other sources, including other sources evaluated and rejected, and the reason why they were rejected;

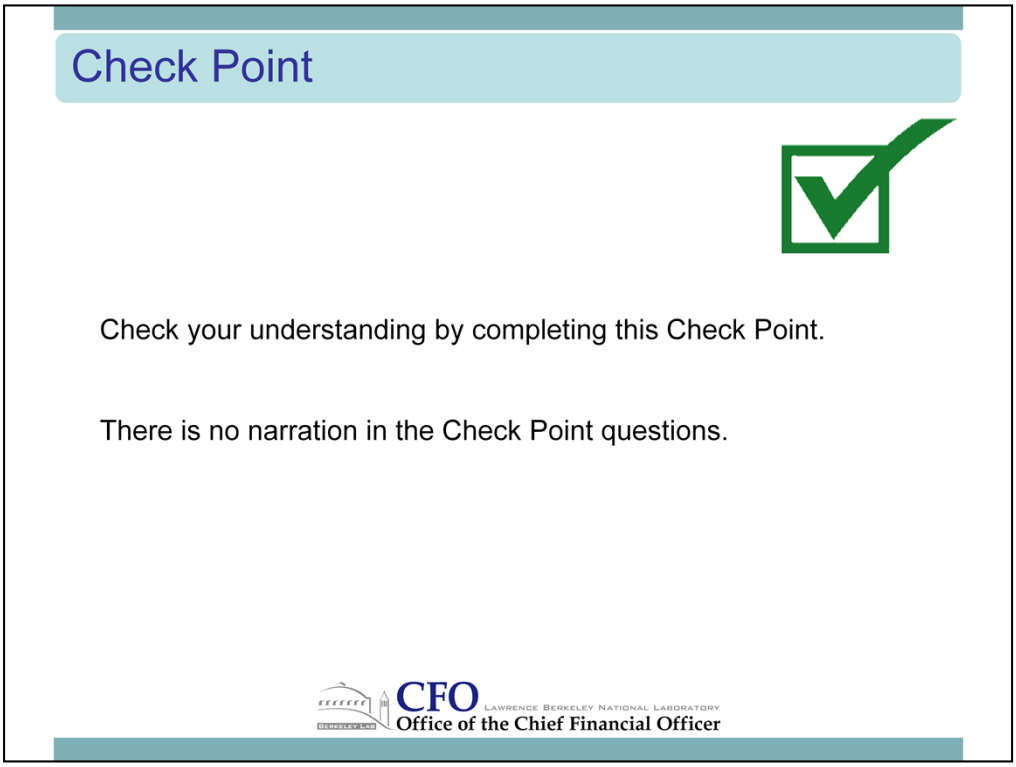
•Whether Procurement and the Laboratory's Small Business Office were consulted; and

•The potential for follow-on work, whether it can be competed, and if not, the reason it cannot be competed.

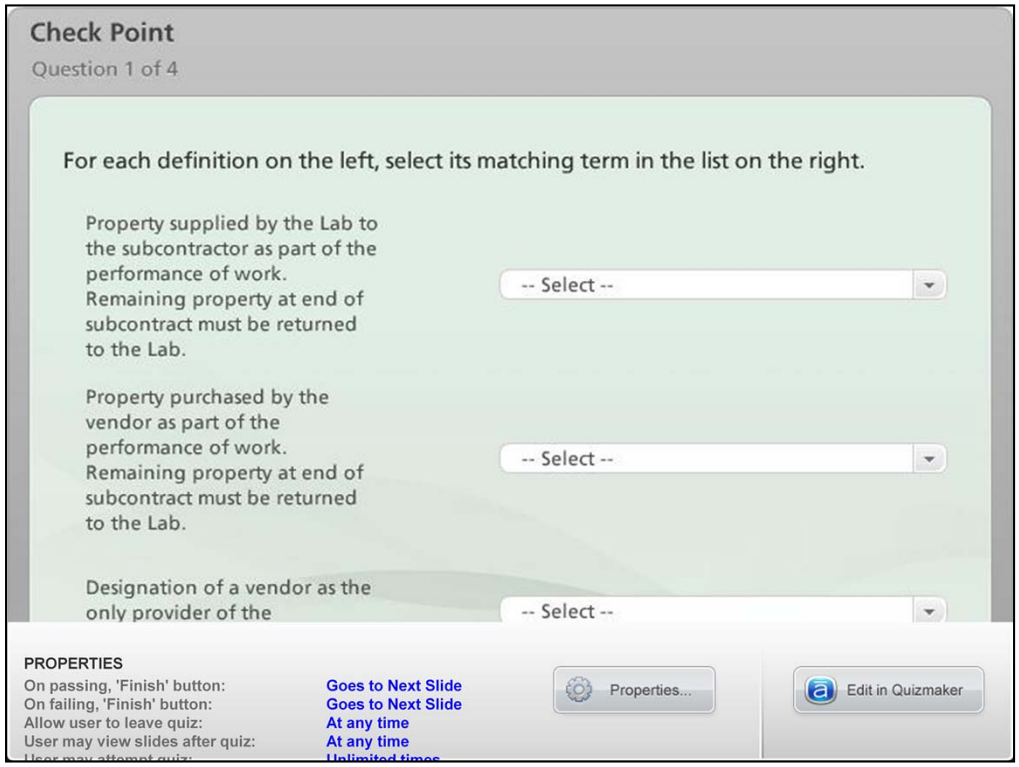


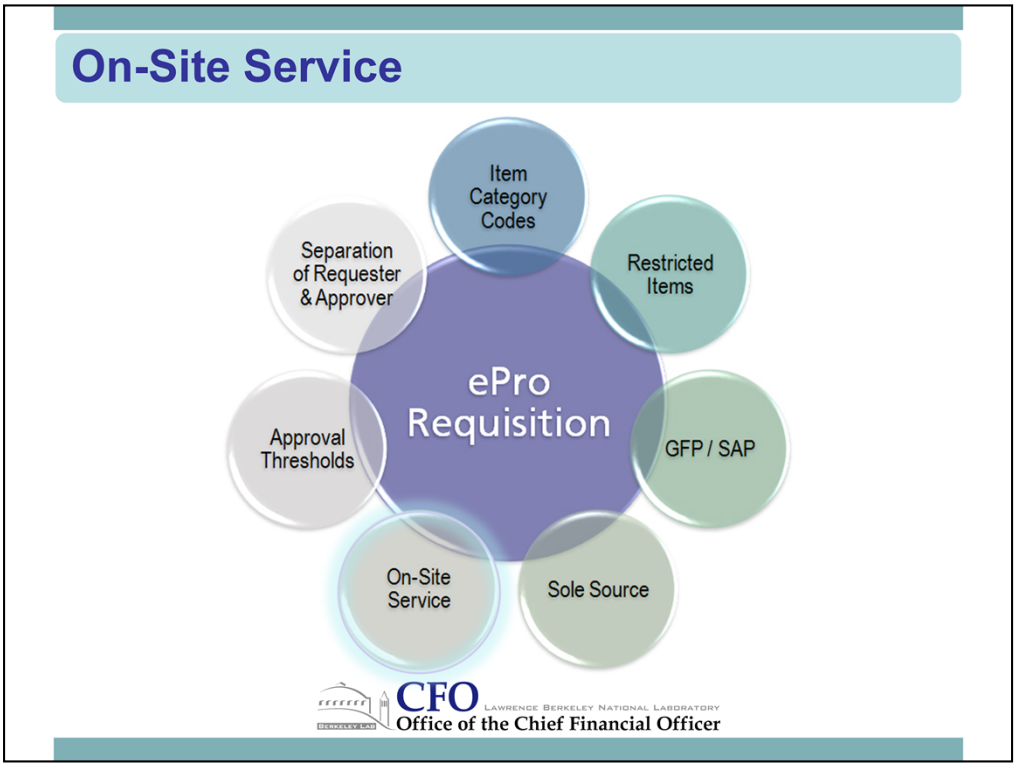
For requests from $25,000 to $100,000, the requisition preparer will select a sole source reason, available from a drop down menu.

Sole Source requisitions totaling more than $100,000.00 require formal written justification. The requester must complete and submit the Justification for Sole Source Procurement Form, which is available through this link or from the Forms for Users option on the Procurement home page. A completed form is also required for Intra University Transactions over $25,000.

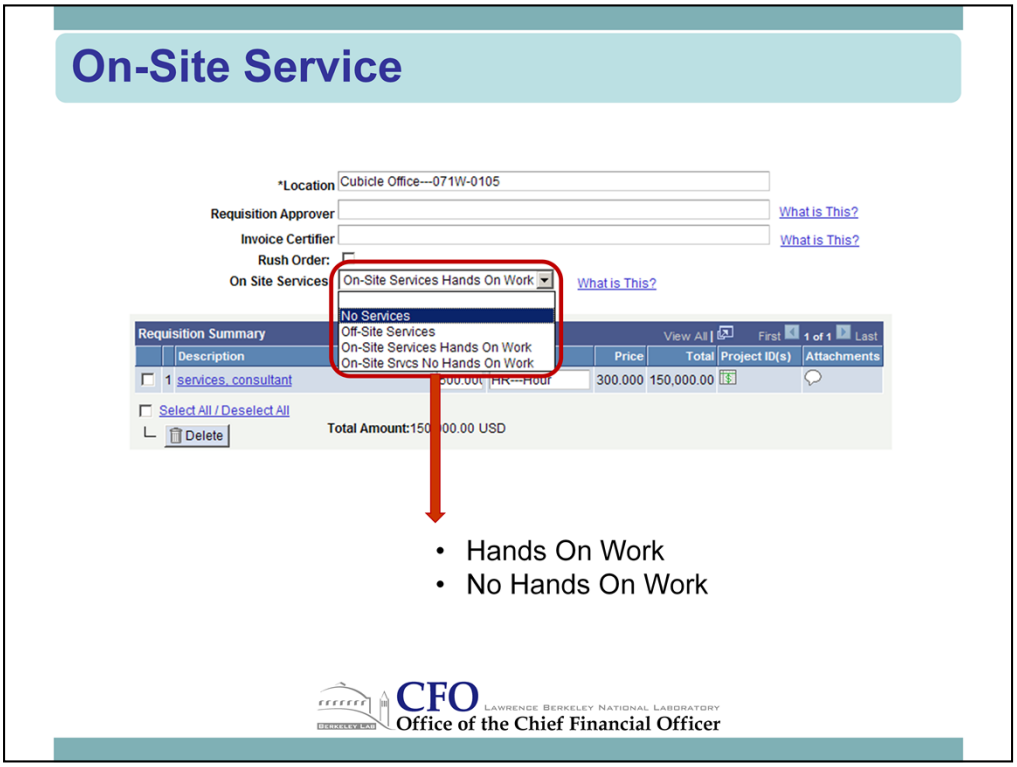


It’s time for another check point. When you are ready to begin, click the button on the player bar.


Check Point
Question 1 of 4
For each definition on the left, select its matching term in the list on the right.
Property supplied by the Lab to the subcontractor as part of the performance of work. Remaining property at end of subcontract must be returned to the Lab.
-- Select --
Property purchased by the vendor as part of the performance of work. Remaining property at end of subcontract must be returned to the Lab.
-- Select --
Designation of a vendor as the only provider of the
-- Select --
PROPERTIES
On passing, 'Finish' button: Goes to Next Slide
On failing, 'Finish' button: Goes to Next Slide
Allow user to leave quiz: At any time
User may view slides after quiz: At any time
Properties...
Edit in Quizmaker



LBNL is required to assure that subcontractor personnel who perform work at LBNL facilities do so in a safe manner in compliance with applicable regulations. For that reason, you need to be familiar with our policies regarding on-site services.



When you create a requisition for on-site services, you need to indicate the type of service that is being acquired. On-Site services at LBNL are considered to be work performed on the hill or at LBNL Offsite, Leased Facilities.

There are two types of onsite services: hands on work, and no hands on work. Let's explore these now.

On-Site Service Hands-On Work
Construction and Repair
Materials Handling
Instructions
PROPERTIES
Allow user to leave interaction: Anytime
Show 'Next Slide' Button: Don't show
Completion Button Label: Next Slide
Properties...
Edit in Engage

On-Site Service – Hands On Work

- Subcontractor Job Hazard Analysis Work Authorization form (SJHAWA) must be attached to all requisitions for On-Site Services involving Hands On Work.
- SJHAWA describes the unique hazards that apply to the work.
- Further On-Site Services information:
  - http://www.lbl.gov/Workplace/CFO/pro/faq/faq_services.html
  - http://www.lbl.gov/ehs/ssa/nssa

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

To be completed by LBNL Procurement		
Requisition Number:	Subcontractor/Vendor/Guest:	PO Number:
Requester/Division:	Buyer:	

To be prepared by the LBNL Requester / Division

Instructions: To request a new subcontract for on-site services involving hands-on work, the LBNL Requester/Division must complete this section of the form and return it to Berkeley Lab Procurement. The Subcontractor/Vendor/Guest must then complete Items 1-21 to identify all hazards that could be present in the scope of work and the hazard control methods to be applied. This form may also be used for guests who do not work under 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) 486-5440.

Date Prepared:

Estimated start time / length of job: /

Requester/Division:	Phone /Fax:	E-Mail Address:
Prepared by:	Phone /Fax:	E-Mail Address:

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

Job Location (Bldg. No.) / Site:

Date Completed:	Requester/Division Approval: I authorize the work to proceed subject to the specified controls.
Work Hazard Level (Low or High):	

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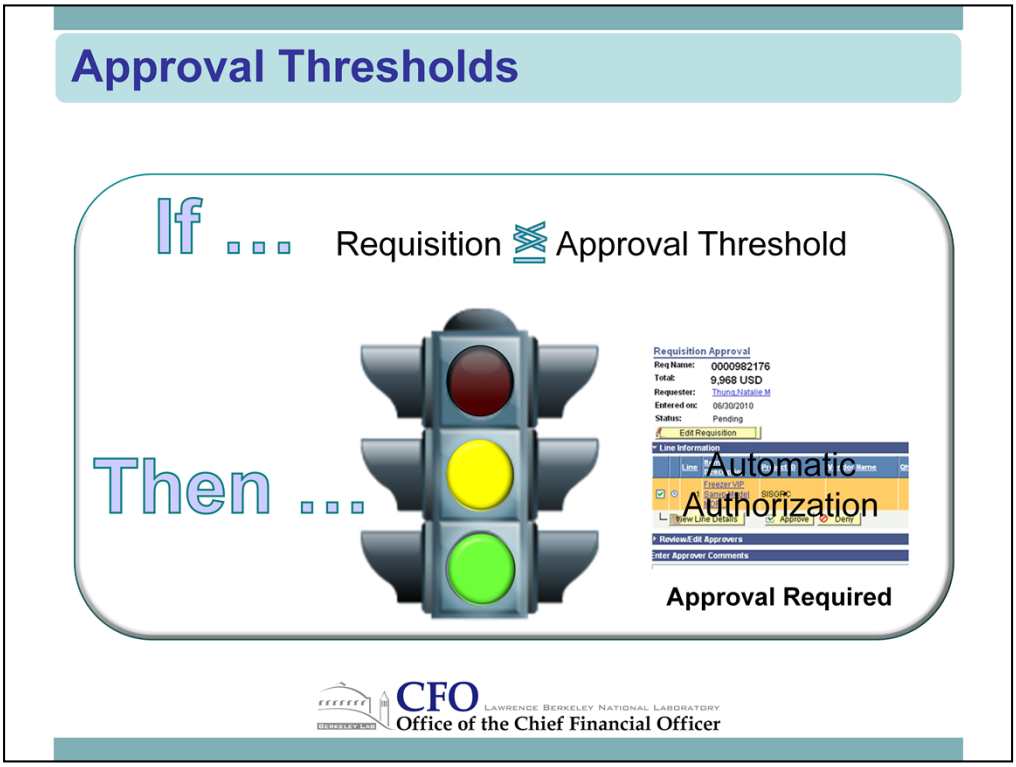
For requisitions for on site, hands on work, the requisition preparer should attach a link to the Subcontractor Job Hazard Analysis Work Authorization (SJHAWA) form that describes the unique hazards applicable to the work.

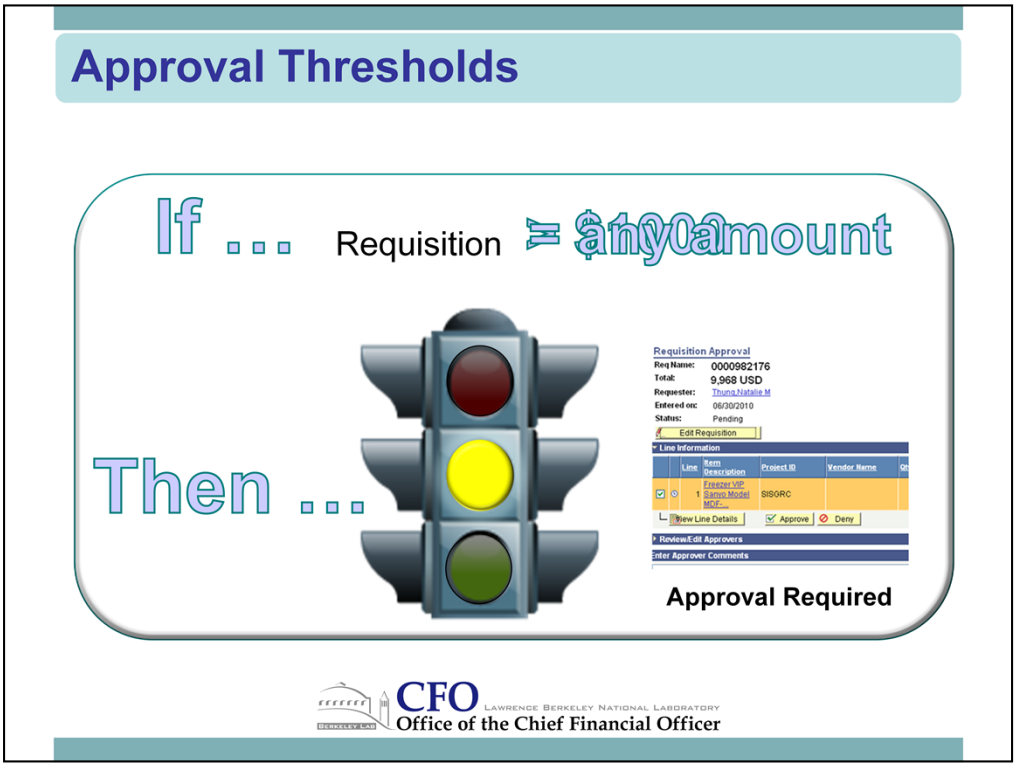
To learn more about On-Site Services, consult these links.

On-Site Service NO Hands-On Work
Office Work
Professional Services
Presentations /
Instructions
Click the tabs on the left to explore examples of On-Site Service **No Hands-On Work**.
PROPERTIES
Allow user to leave interaction: Anytime
Show 'Next Slide' Button: Don't show
Completion Button Label: Next Slide
Properties...
Edit in Engage

Another key concept you should be familiar with before attempting to enter a requisition in eProcurement is Approval Thresholds.



An approval threshold in simple terms is a dollar limit, that when exceeded, requires approval. With regard to entering a purchase requisition, there is an approval threshold set by each division. When a requisition is submitted and will be billed to that division, AND the total amount to be paid by that division exceeds that approval threshold, eProcurement flags the requisition and routes it for special approval.

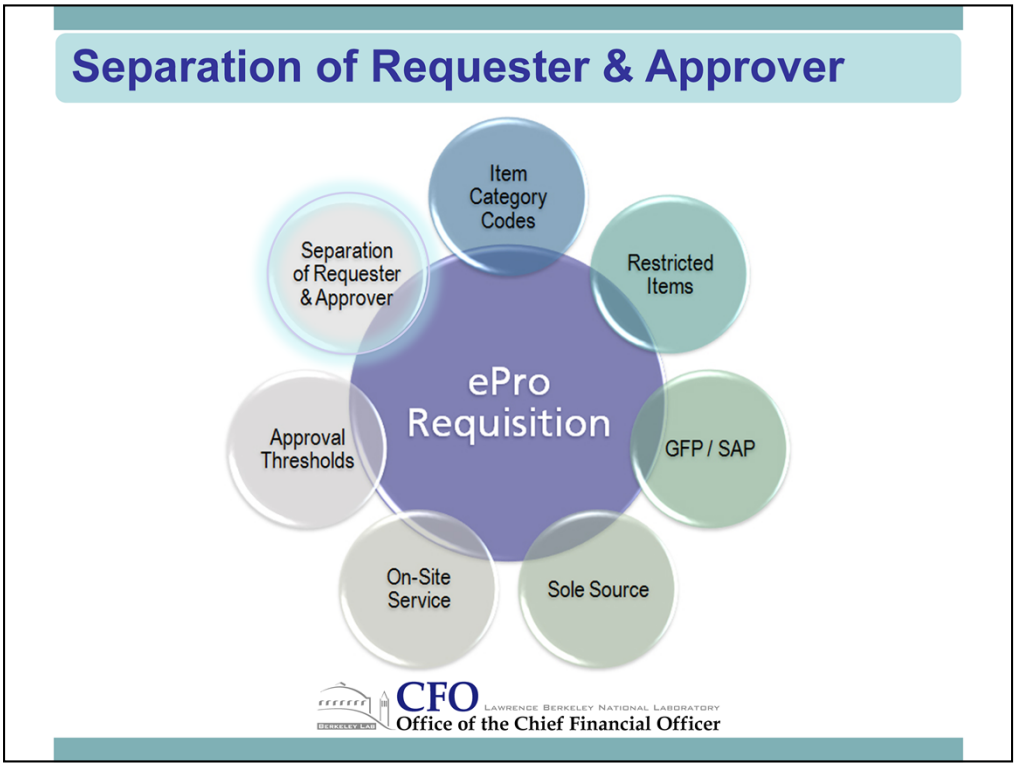


So, for example, if the division who is responsible for payment has set an approval threshold of $1000, any requisition to be paid by that division that that totals an amount greater than $1000 must be routed to an approver who has signature authority as shown in the Signature Authorization System.

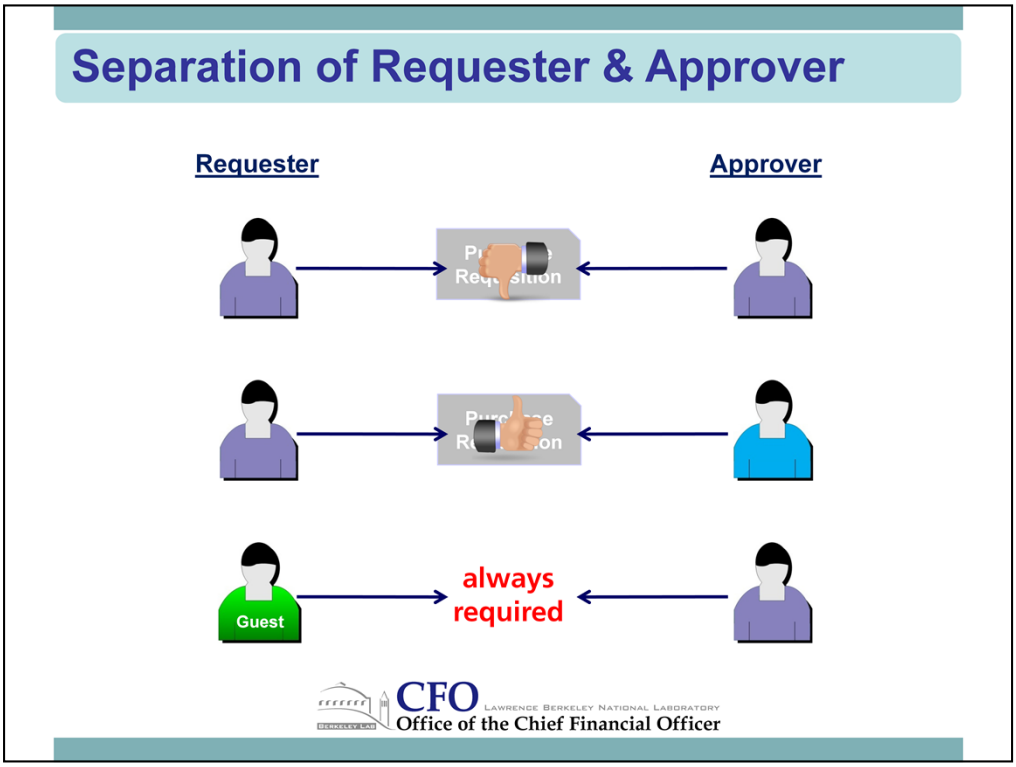
Some divisions make it a practice to require approval when any requisition for their division is entered. In cases like this, the division sets the approval threshold at 0$ so that every requisition must be routed to an approver who has signature authority as shown in the Signature Authorization System.

In eProcurement, requisitions exceeding the approval threshold will automatically be routed to the assigned approver. The requisition preparer does nothing but await approval. It's a good idea for you to familiarize yourself with the approval threshold set by your division so that you are

aware of the potential extra time it could take when an additional approval is required.



Let's say that you have signature authority as shown in the Signature Authorization System. You enter a requisition whose dollar amount exceeds your division's approval threshold. Do you think is appropriate for you to sign off on this exception? Probably not. This is why we have rules governing the Separation of Approver and Requester.



The Requester and the Approver cannot be the same person if the order is greater than the threshold established by the division, and therefore the requisition must be routed to an Approver who has signature authority as shown in the Signature Authorization System.

In addition, if the Requester is a “Guest,” the requisition must always (regardless of dollar amount) be routed to an Approver who has signature authority as shown in the Signature Authorization System.

Check Point

Check your understanding by completing this Check Point.

There is no narration in the Check Point questions.

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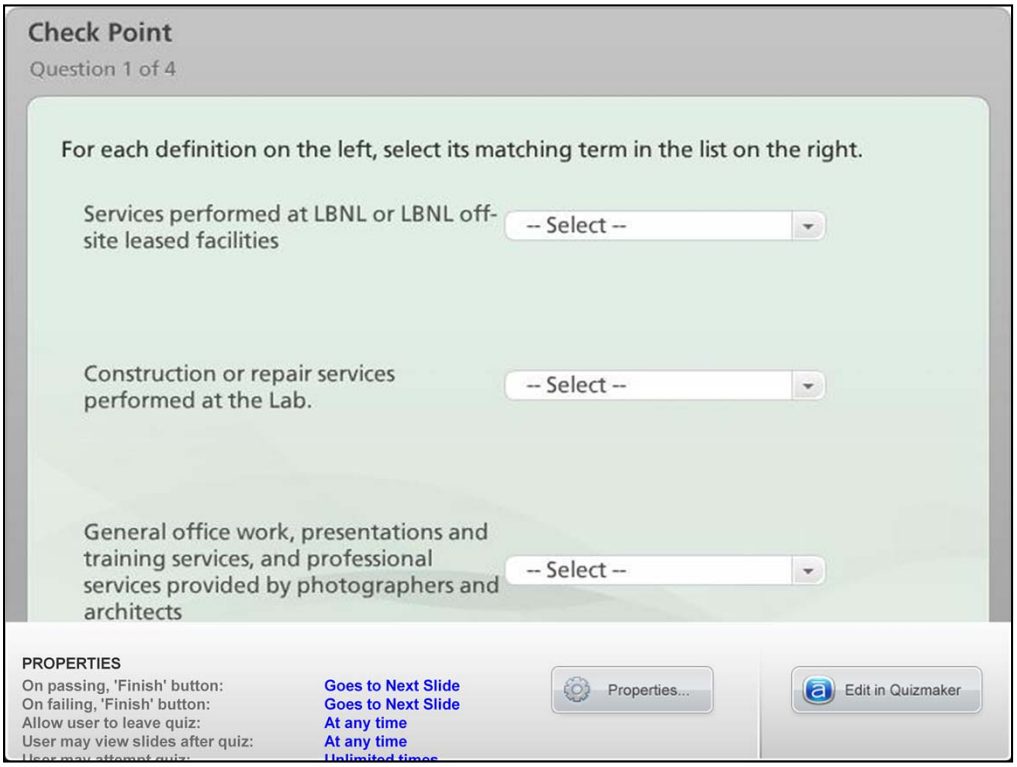
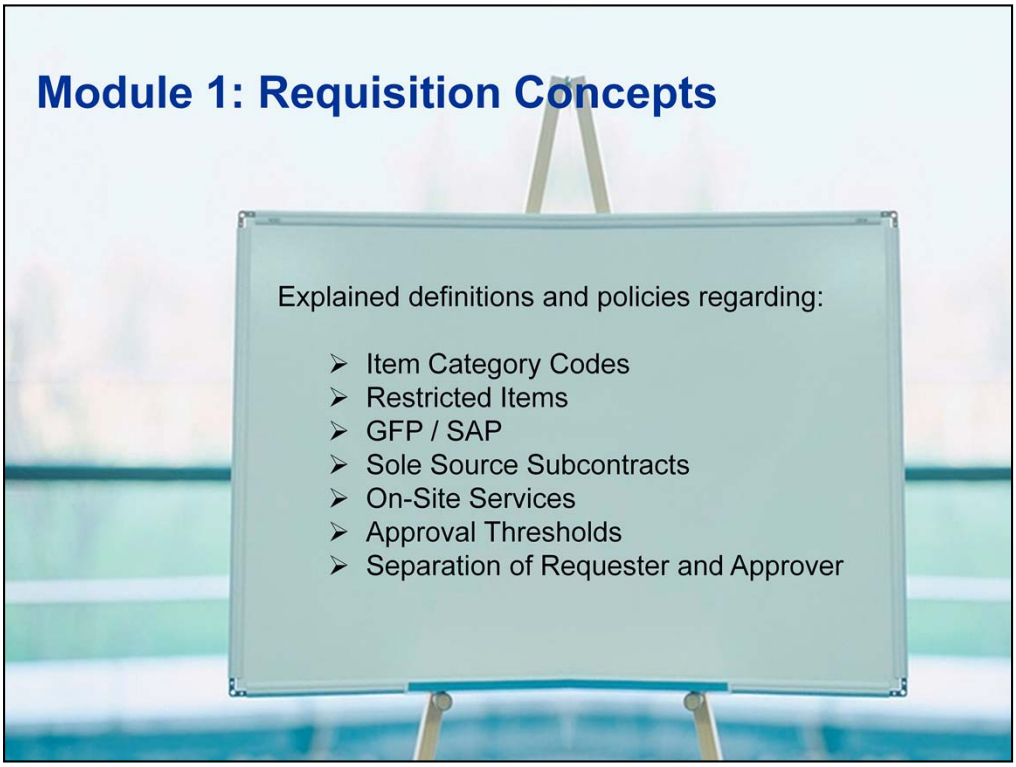

Check Point
Question 1 of 4
For each definition on the left, select its matching term in the list on the right.
Services performed at LBNL or LBNL off-site leased facilities
-- Select --
Construction or repair services performed at the Lab.
-- Select --
General office work, presentations and training services, and professional services provided by photographers and architects
-- Select --
PROPERTIES
On passing, 'Finish' button: Goes to Next Slide
On failing, 'Finish' button: Goes to Next Slide
Allow user to leave quiz: At any time
User may view slides after quiz: At any time
Properties...
Edit in Quizmaker



So now that we've reached the end of Module 1, let's briefly recap what we've learned so far. We talked about Item Category Codes and Restricted Items, including what they are and how they are used. We covered Government Furnished Property and Subcontractor Acquired Property. We also discussed what a Sole Source designation is and when it's permitted under Lab policies. On-Site Services, with Hands On or No Hands-On work were reviewed. We explained the purpose of Approval Thresholds and how they are enforced. And we discussed why it's necessary to have a separation of Requester and Approver in certain purchase requisitions.

Now that you have these concepts under your belt, you're ready to move on to the specifics of how to create a purchase requisition in eProcurement. This information is covered in Module 2 of this course. When you are ready to move on to Module 2, click the Next button on the course player bar.

Module 2: Requisition Instructions

- Access the Create Requisition function in eProcurement.
- List the three steps in the requisition creation process.
- Create and submit a purchase requisition.
- Access previously submitted and/or saved requisitions.

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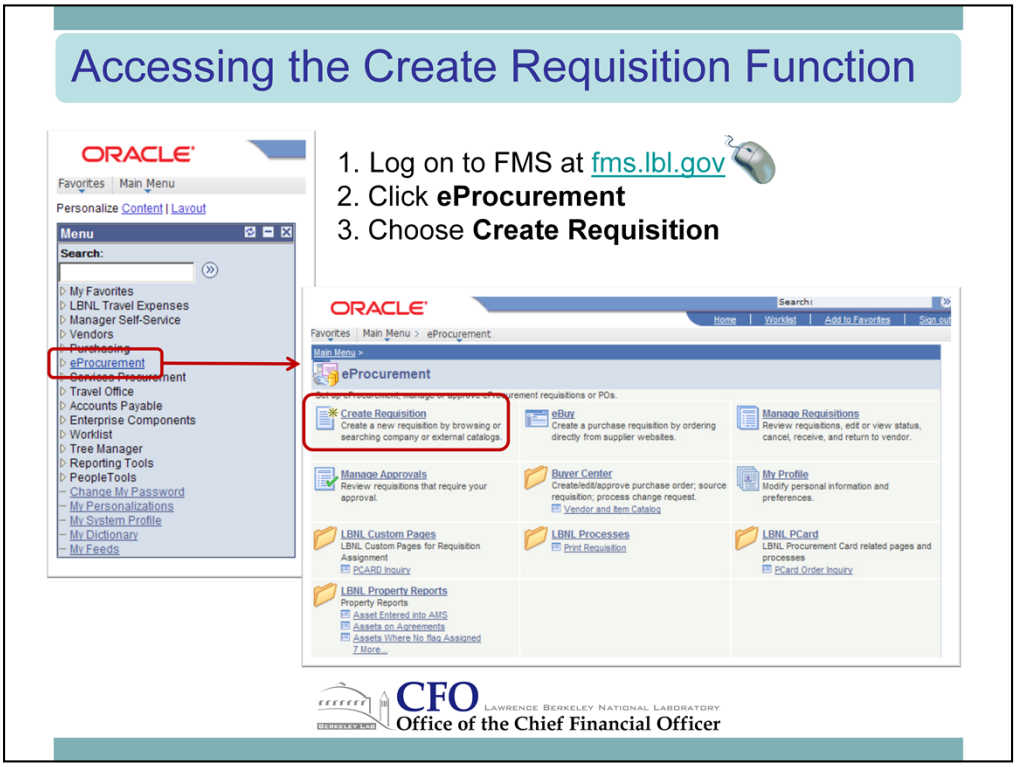
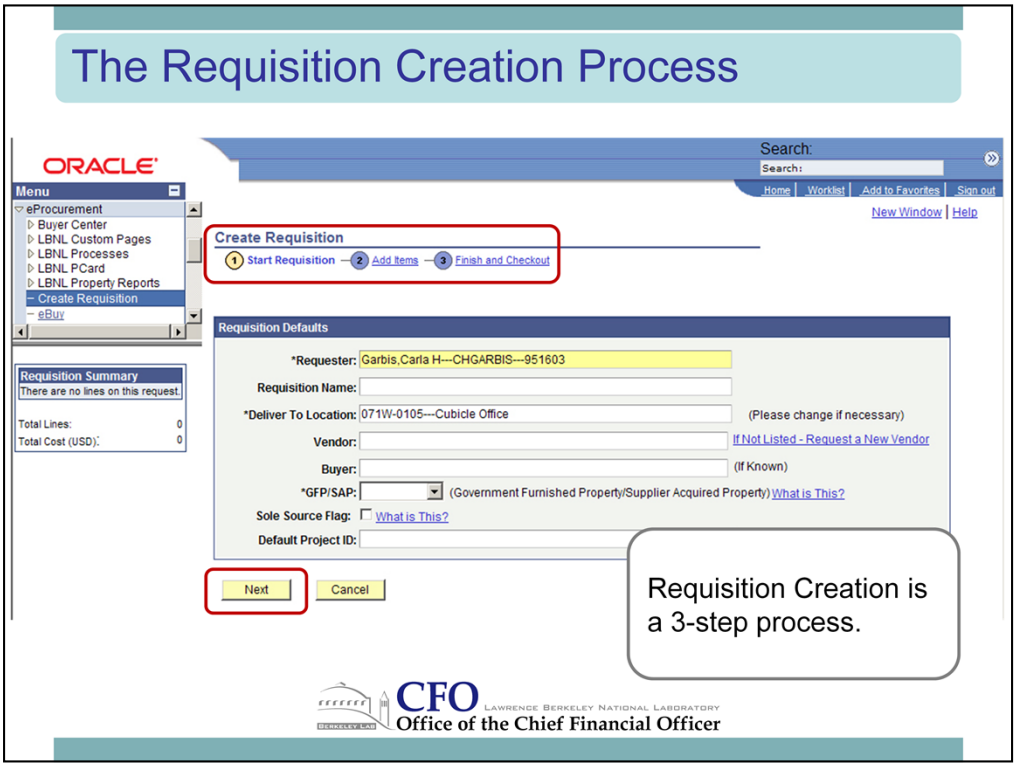
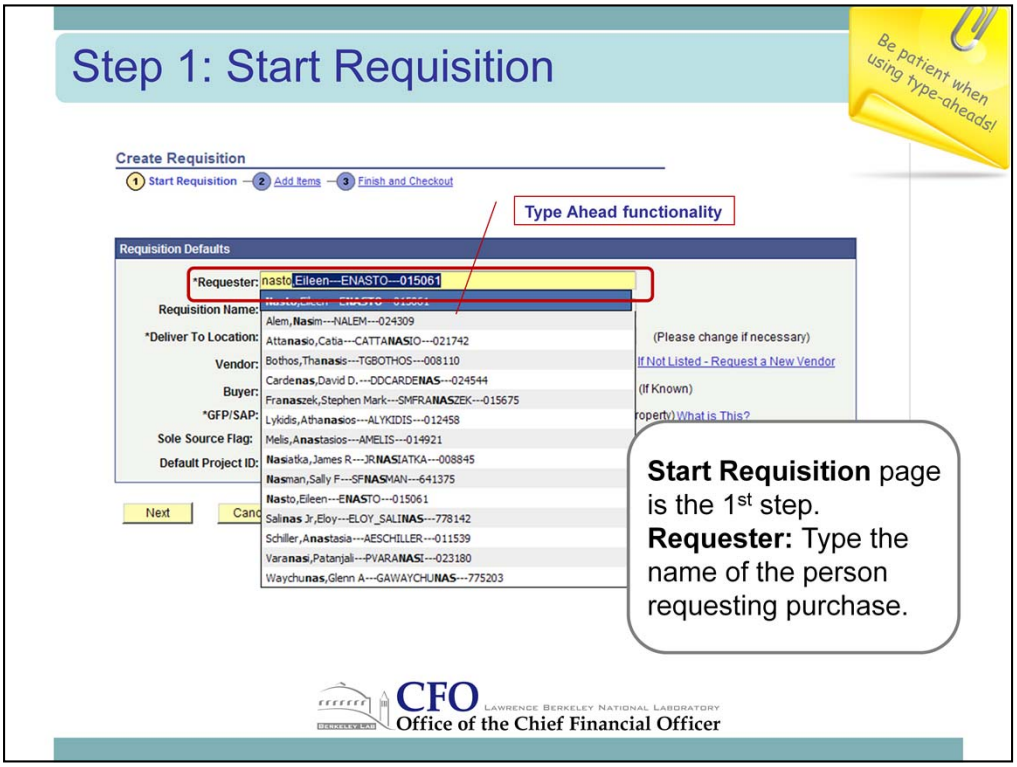
In Module 2, we will discuss the specifics around creating a requisition in eProcurement. You will learn how to access the Create Requisition function in eProcurement, list the three steps in the requisition creation process, create and submit a purchase requisition, and access previously submitted and/or saved requisitions.



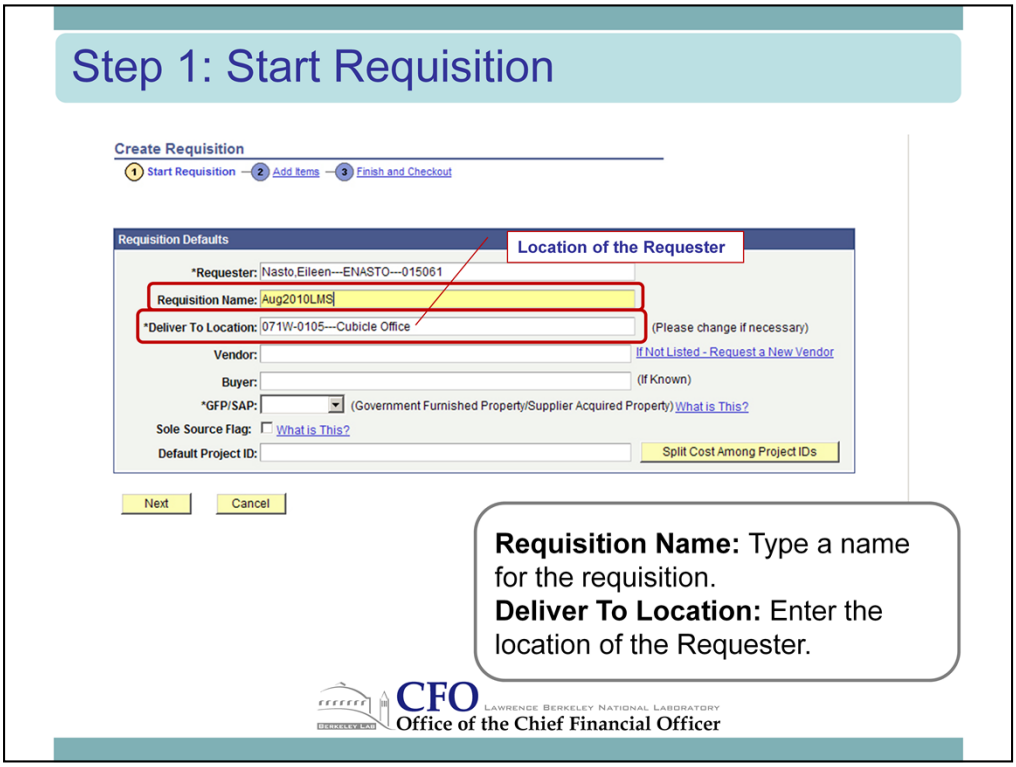
You access eProcurement through FMS (or the Financial Management System). Log in to FMS by typing **fms.lbl.gov** in your browser's address bar. To create a purchase requisition, click the **eProcurement** item in the menu on the left side of the page. When the eProcurement home page opens, click the **Create Requisition** option. The Manage Requisitions option, which will be covered later in this course, is also available from the eProcurement home page.



Requisition creation is a three-step process, as outlined here at the top of the page. The system guides you through each of these steps on three main pages with a series of **Next** buttons. But you may choose to use the links at the top of the page to navigate between the steps as well.

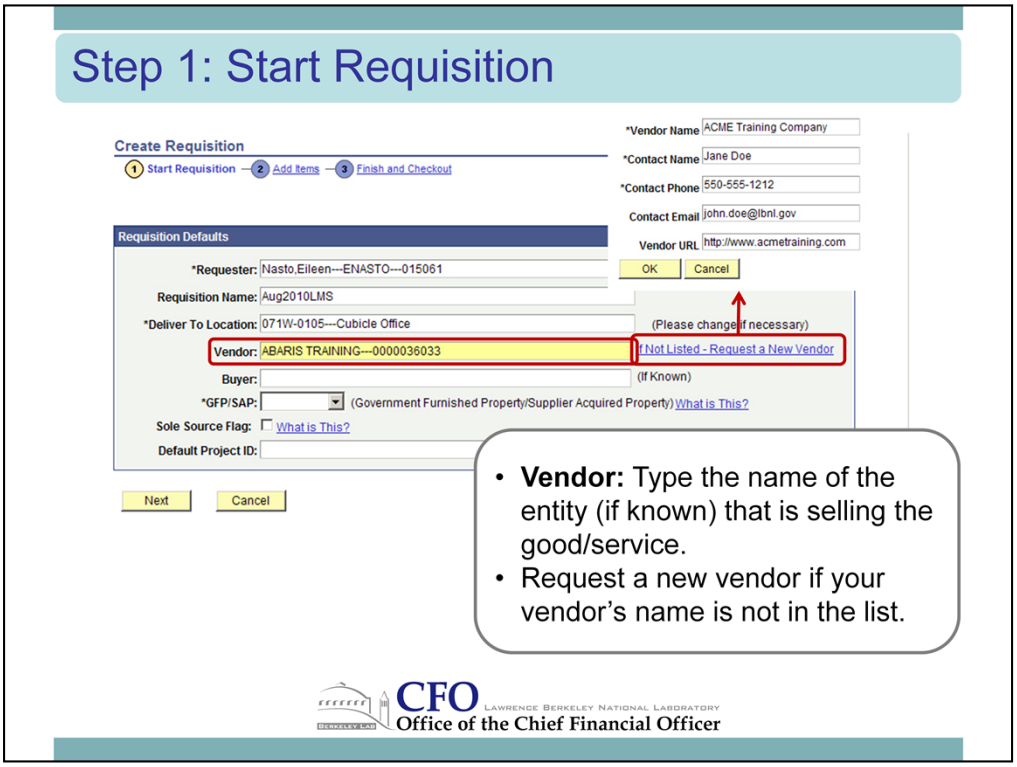


The first step in requisition creation is **Start Requisition**. When you first open the **Step 1 Start Requisition** page, your name is automatically populated in the **Requester** field. However, if you have been asked to request a requisition on behalf of someone else, you should replace your name with the requester's name. Most of the single line text fields in the eProcurement system offer what are called **type-aheads**. Once you type a few characters in the empty field, a list of items that match those characters displays. Select the matching item in the type-ahead list or keep typing to narrow the list to fewer results before selecting the item. Many of the type-ahead lists can contain several different values so please be patient when typing your characters to give the system time to gather all of the matching values.

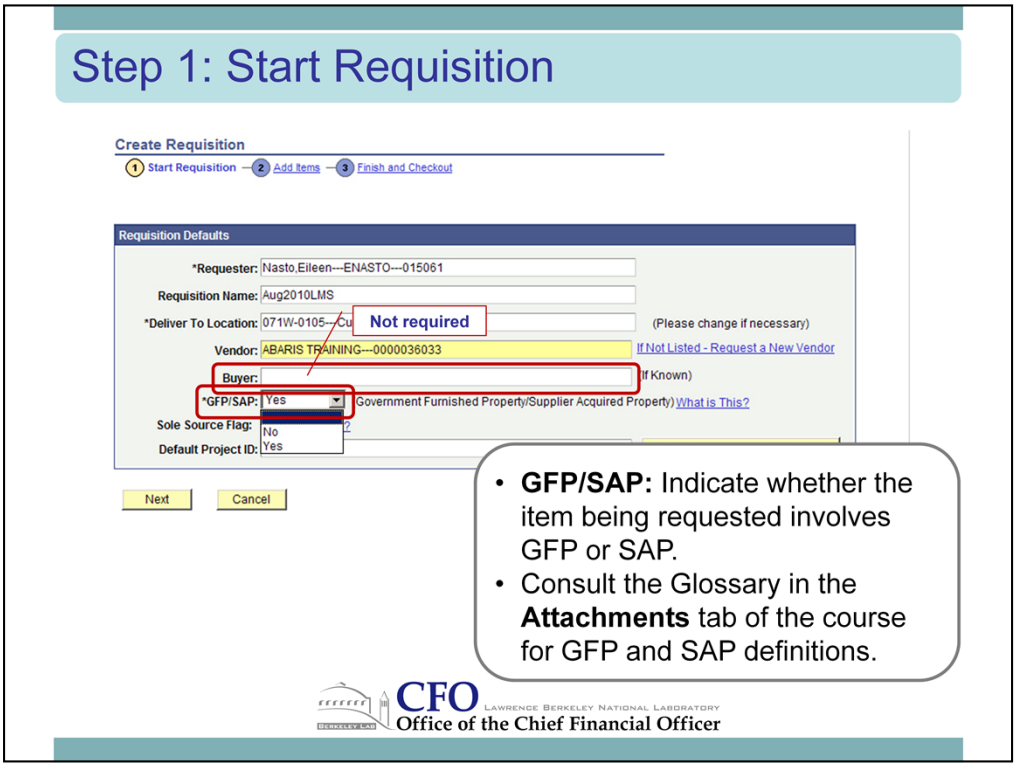


Although not required, it is highly recommended that you enter a name for your requisition in the Requisition Name field. There is no defined method for creating requisition names so you may enter anything you want as the requisition name. Many people choose to include dates, requester names, and purpose abbreviations in the **Requisition Name** field but you can enter anything you like.

The **Deliver To Location** field is automatically populated with the location of the Requester. However, you can change that information if desired by replacing the text in that field.

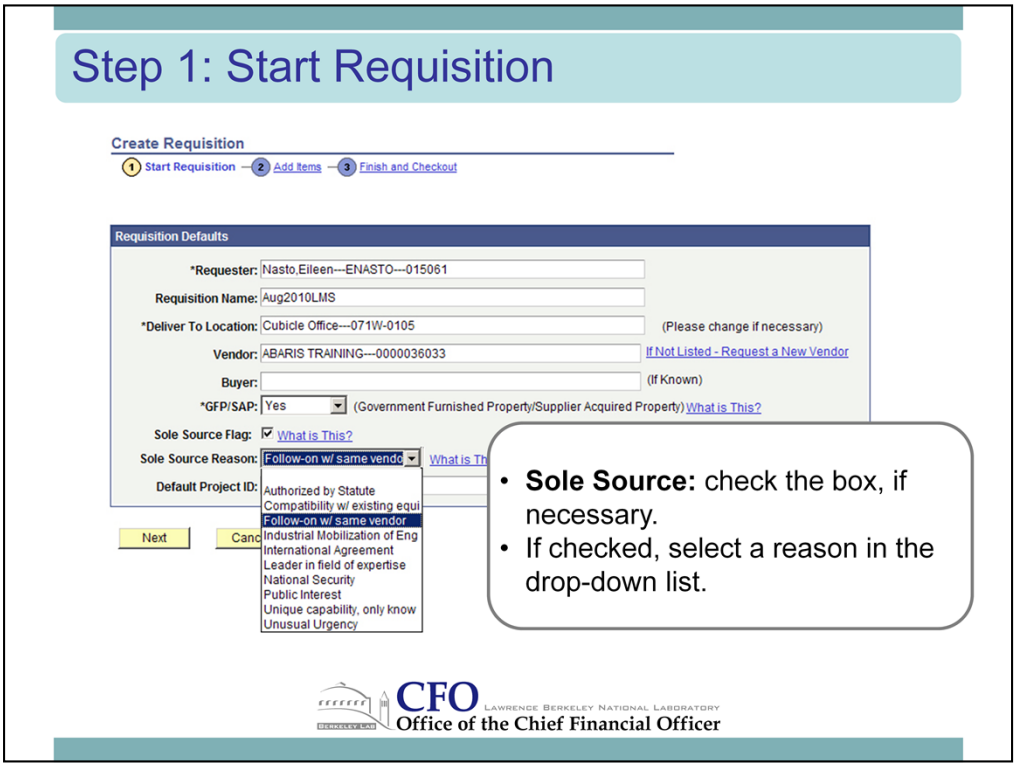


The **Vendor** field is where you enter the name of the entity, if known, from which the goods or services requested will be purchased. Use the type-ahead function to locate the name of the appropriate vendor. If the vendor name is not in the type-ahead list, you should request a new vendor by clicking the link next to that field. When requesting a new vendor, you will be required to enter the name of the vendor, contact information, etc. before submitting the request.

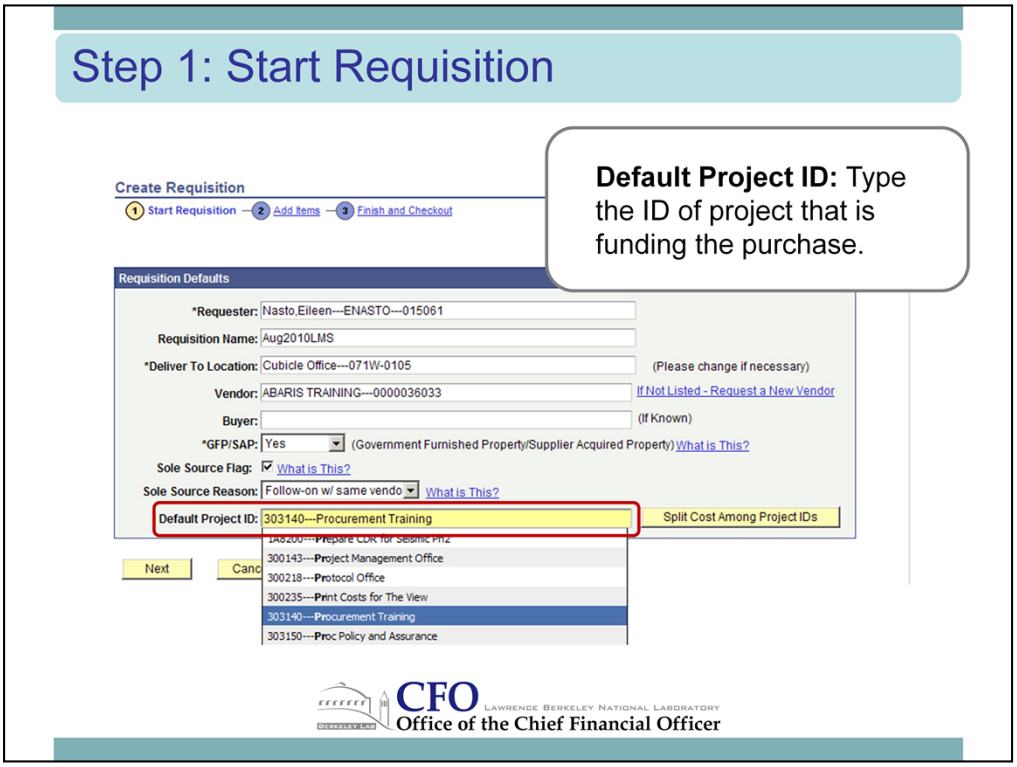


The **Buyer** field is not required, and is normally left blank.

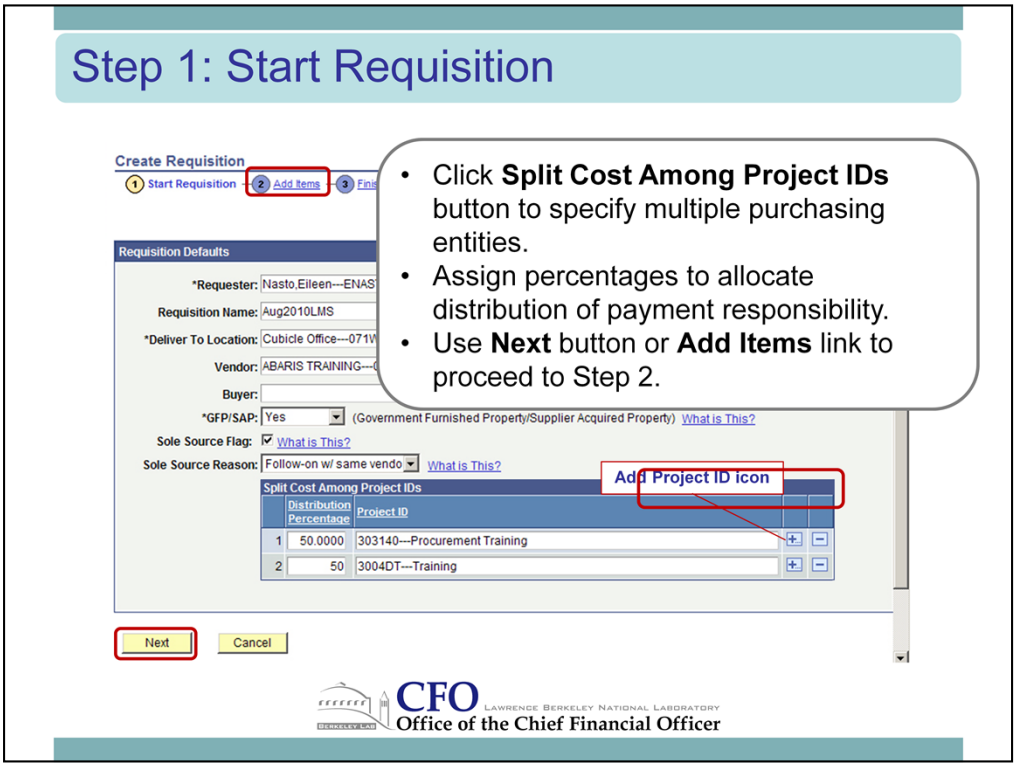
The **GFP/SAP** field is a required field. This is where you tell your buyer whether the purchase requisition includes any property that is furnished by LBNL or purchased by the subcontractor and will thus need to be provided to the lab at completion of the contract. If the requisition includes GFP or SAP, select **Yes** in the list. Otherwise, select **No**.



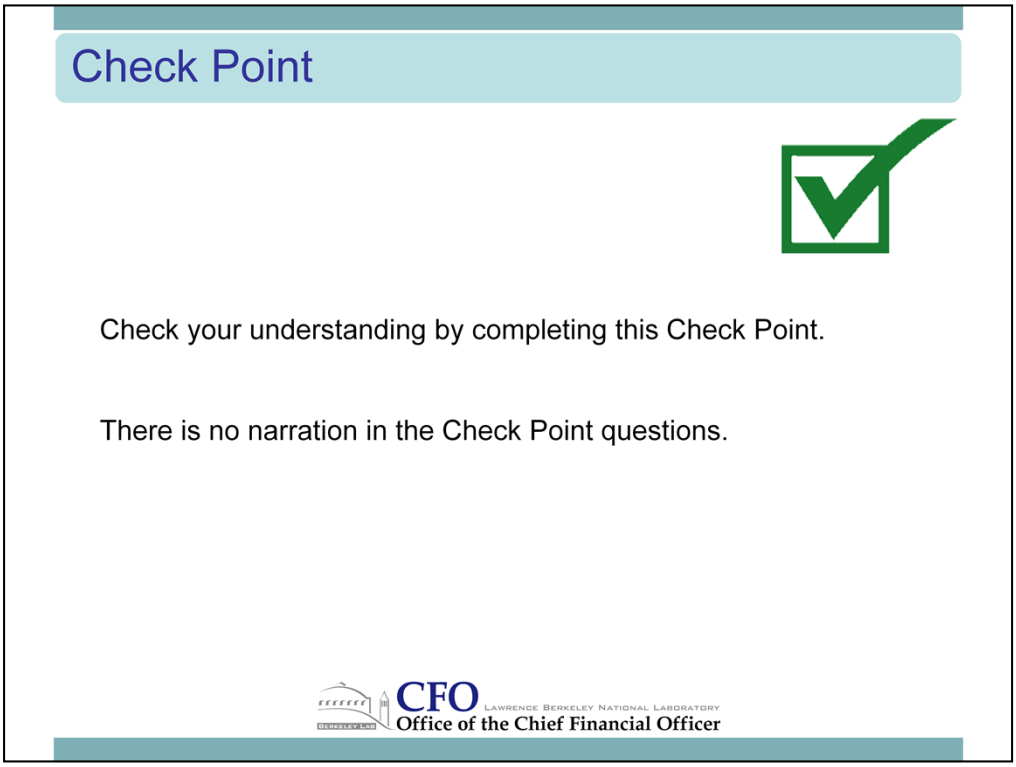
Check the **Sole Source Flag** box if the requisition has a sole source designation as defined by the Procurement policies of the Lab. When you flag a requisition with a Sole Source designation, a drop-down list appears below the check the box. You will need to select the appropriate reason for the sole source designation.



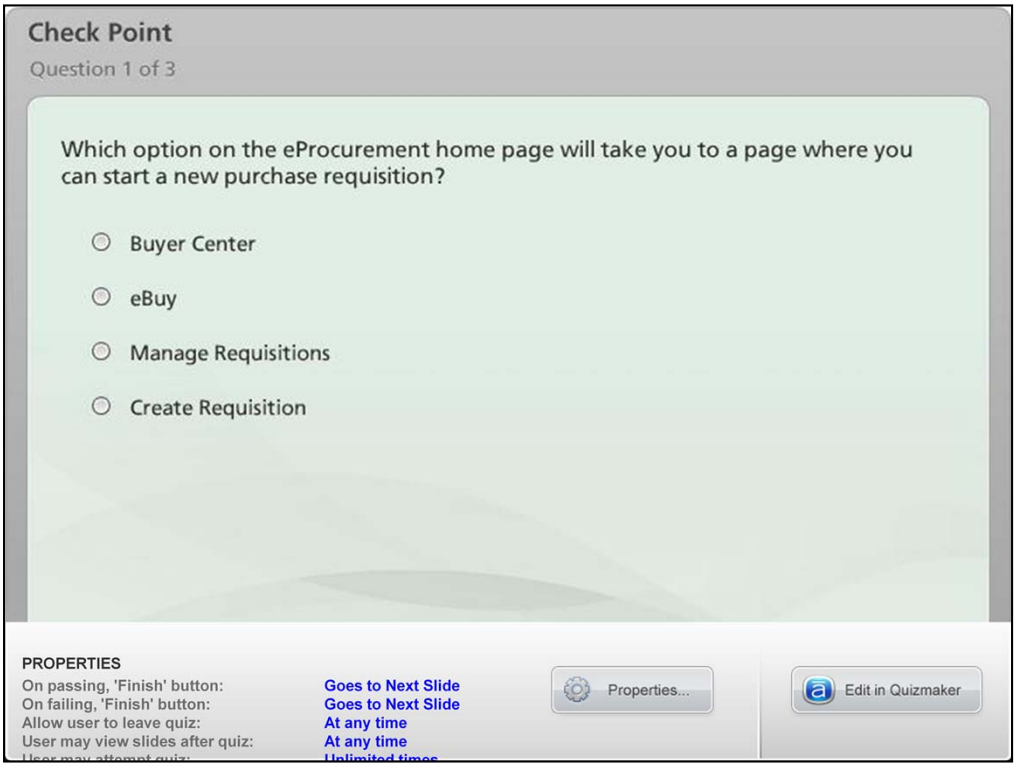
The **Default Project ID** field contains the identification number for the division and/or project that is responsible for payment of the goods or services included in the requisition. Select the project id from the type ahead list or type the full project number in the box.

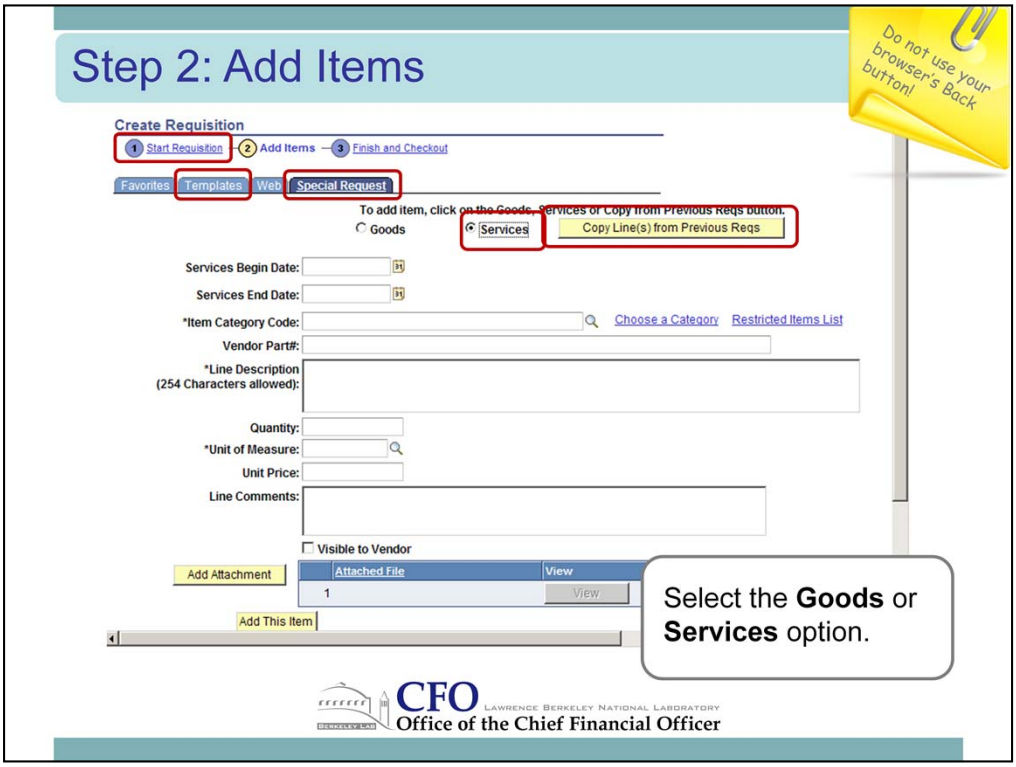


In many cases, multiple projects are responsible for payment. If this is the case with your requisition, click the **Split Cost Among Project IDs** button. You can click the **Add** icon to add another project ID and then assign percentages for distribution of payment. After you have entered all of this information, you can proceed to **Step 2**, which is **Add Items**. Do this either by clicking the **Next** button at the bottom of the page or the **Add Items** link at the top of the page.



Let's take a moment to check your understanding of the information provided so far in this course by answering just a few questions in this Check Point. No narration accompanies the Check Point questions. Click the button on the player bar when you are ready to start.

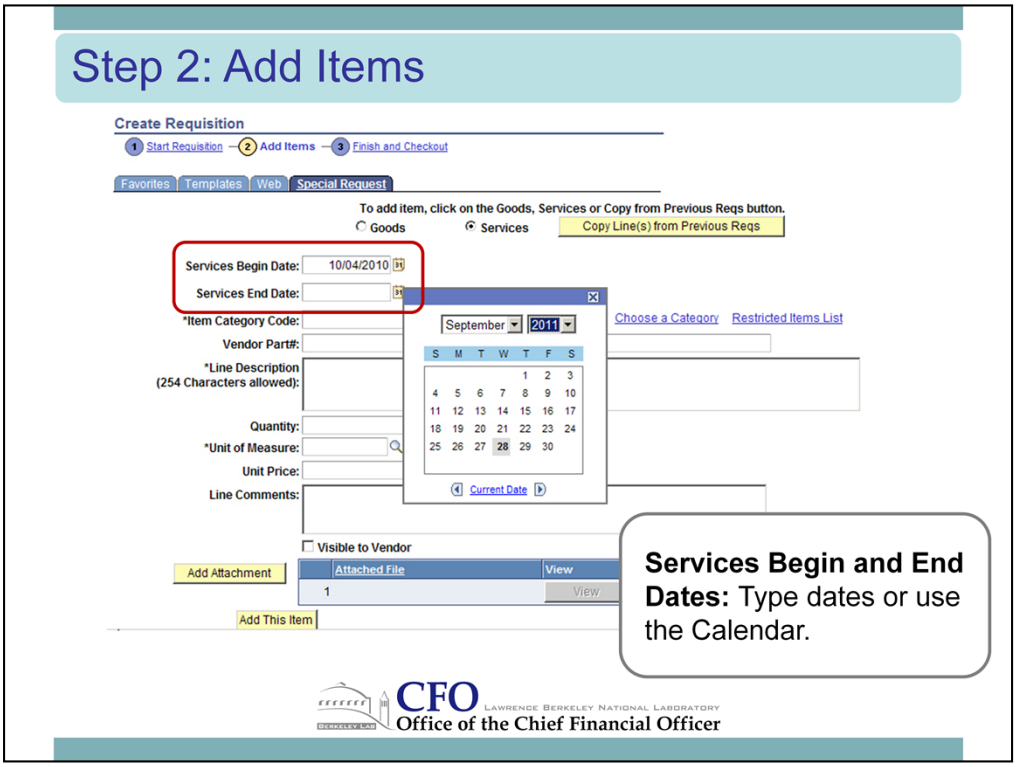

Check Point
Question 1 of 3
Which option on the eProcurement home page will take you to a page where you can start a new purchase requisition?
Buyer Center
eBuy
Manage Requisitions
Create Requisition
PROPERTIES
On passing, 'Finish' button: Goes to Next Slide
On failing, 'Finish' button: Goes to Next Slide
Allow user to leave quiz: At any time
User may view slides after quiz: At any time
Properties...
Edit in Quizmaker



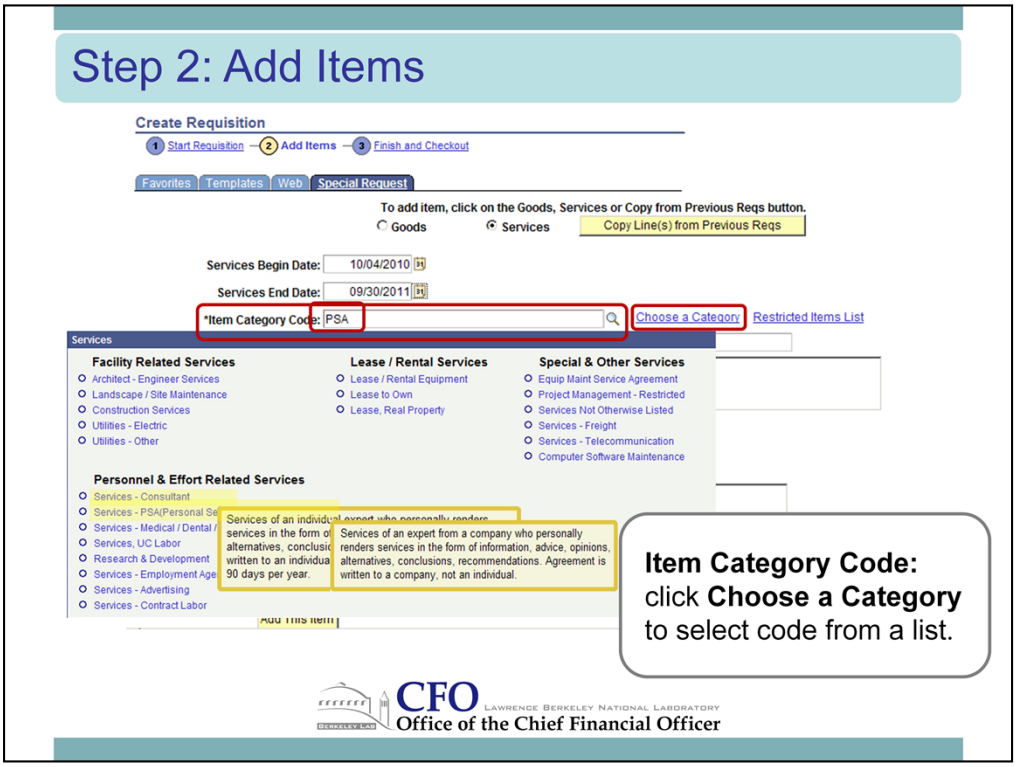
When you first open the **Step 2 Add Items** page, the **Special Request** tab opens by default. This is where you can specify whether the item you are adding to your requisition is a good or a service. Additionally, you can copy lines from a previous requisition or add items from a requisition template using these options. Consult the Attachments tab of this course for additional information regarding adding lines from other requisitions and using templates.

Note, if at any time you need to navigate back to a previous screen while entering a purchase requisition, use a link or button provided on the page. For example, if we needed to go back to step 1 and change some information, we should click the **Start Requisition** link on the top of the page. Do not use your browser's **Back** button to navigate back to a previous screen.

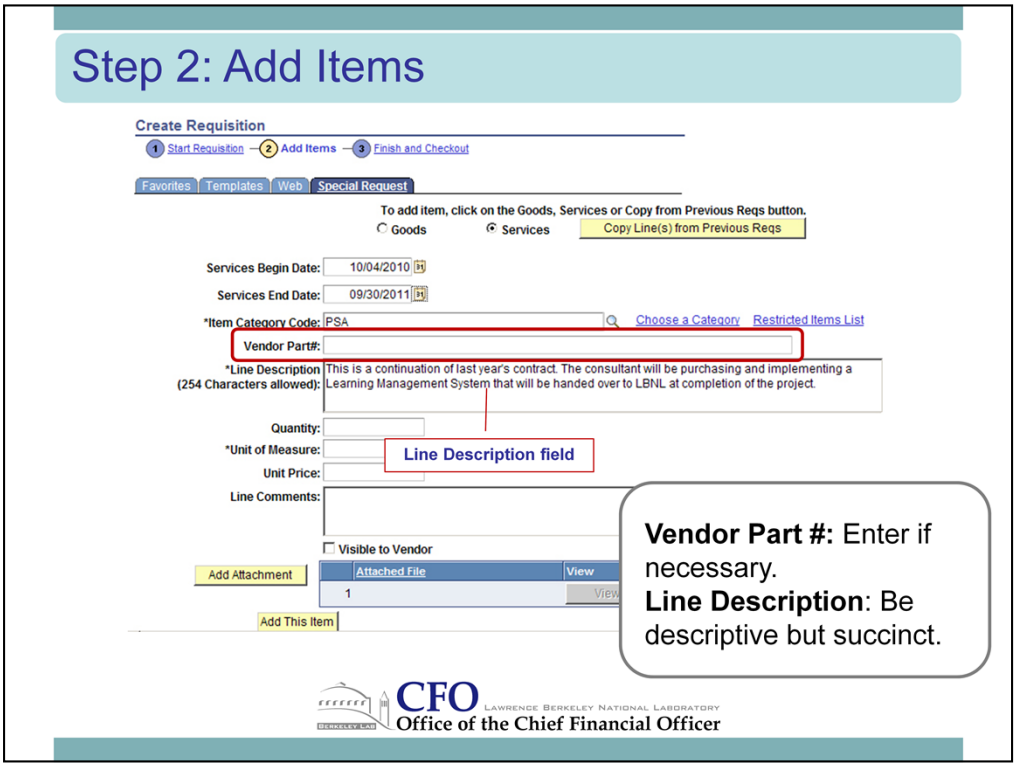
In this case, the first item we are entering is a Service, so we will select the **Services** option. When that option is selected, several fields appear that require information from you regarding the services.



Firstly, you should enter the **Services Begin** and **End** dates, if you know them. You can either type them in each of these fields or click the **Calendar** icon to choose them from a calendar.

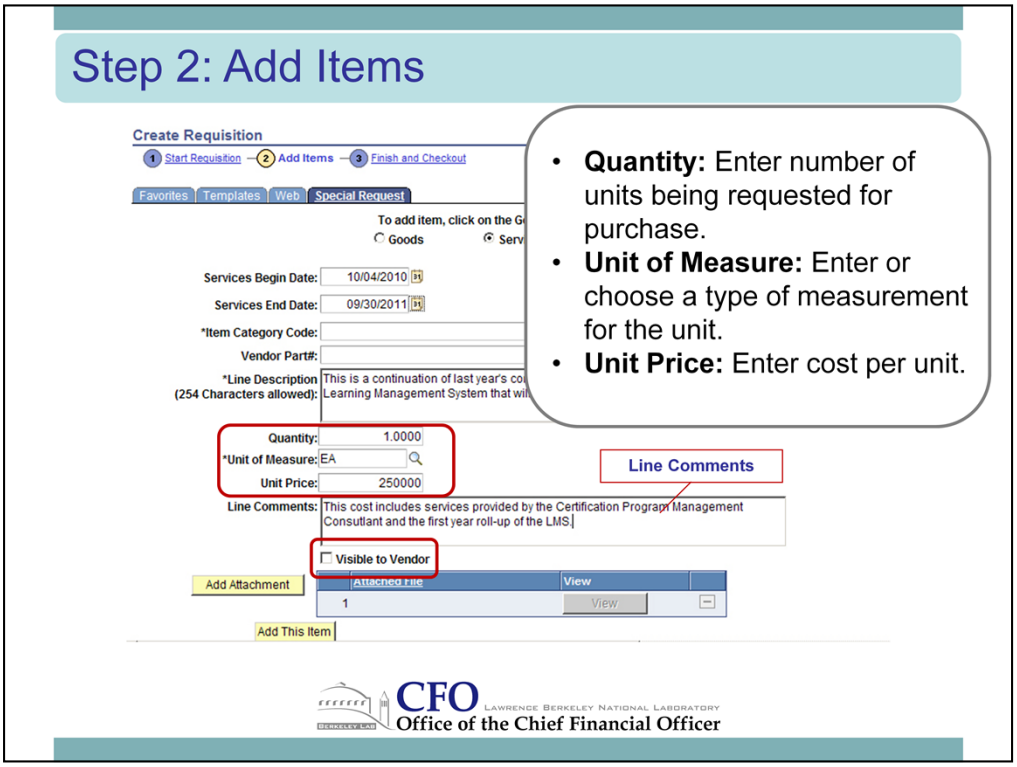


Next, you must enter a category code for the service in the **Item Category Code** field. The easiest way to do that if you do not have the code memorized, is to click the **Choose a Category** link next to the field. A list of Services categories displays where you can click on the category that best applies to your item. You can hover the mouse pointer over a subcategory to view a description about it. This will help you to determine which one is the best fit for your item. In our case, we're entering a line item on our requisition for consulting services through a company. At first, we might think we want **Services - Consultant**, but after reviewing the description, we find that this subcategory is only for an individual, not a company. The actual subcategory we should choose is **Services - PSA (Personal Services Agreement)**. When you've located the one you want, click on it. The system automatically populates the **Item Category Code** field with the code of the subcategory you selected.



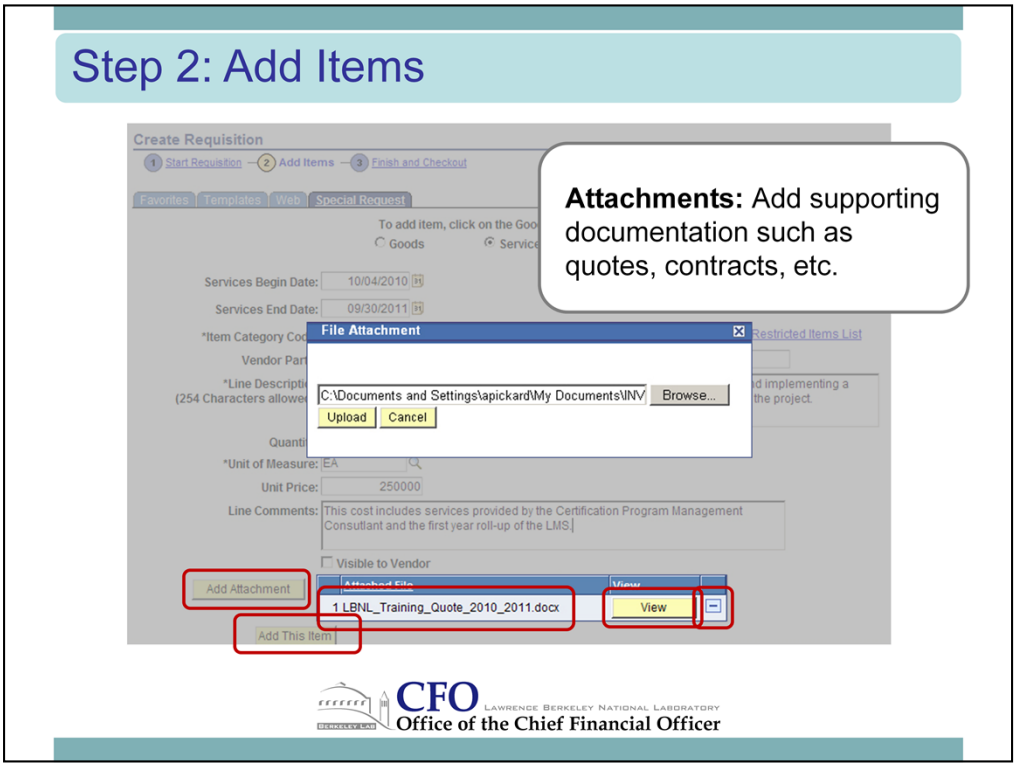
The **Vendor Part #** field is where you enter the part ID of the item being requested, if you know what it is. This is not a requirement.

Next, enter a detailed description of the item or service being purchased in the **Line Description** field. Note that a maximum of 254 characters is allowed in this text box, so make sure that your information is descriptive but succinct.



Next, enter the quantity of the items being requested, the unit of measure, and the cost of each unit. Typically for services, requisition preparers enter a Quantity of 1 and then Each or Lot for Unit of measure.

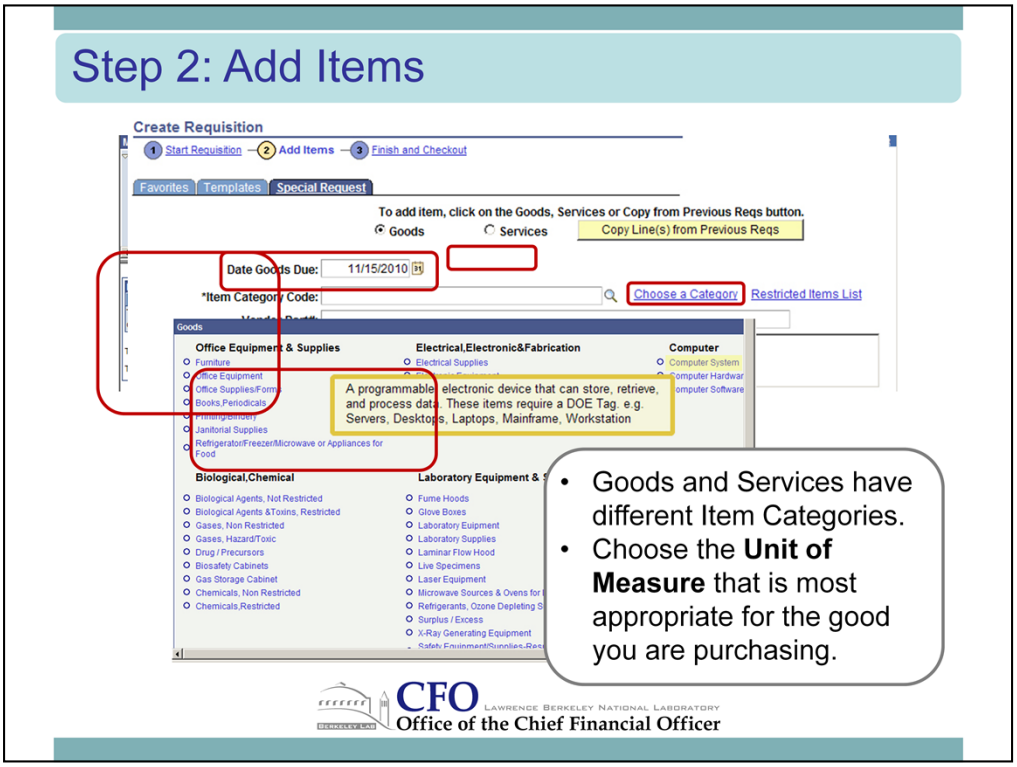
Next, enter any additional comments about the item being requested in the **Line Comments** box. You have more latitude on the number of characters allowed here. So if you weren't able to enter everything that you wanted in the **Line Description** box, feel free to elaborate on that information in the **Line Comments** box. Then, if you want those comments to be visible to the vendor, you can check the **Visible to Vendor** box.



Next, you can upload an attachment for the line item that you are entering. Recommended items to attach include, quotes, contracts, or any other supporting documentation that will help Procurement to understand and properly process the requisition.

To attach a file to the line item, click the **Add Attachment** button. When the File Attachment window opens, click **Browse** and then search for the file on your system. Double-click the file name and then click **Upload** in the File Attachment window. The name of the uploaded file is now available in the Attached File box. You can review the attachment by clicking the **View** button next to its name. If you've decided to remove the attachment for whatever reason, click the **Delete** icon, next to the **View** button.

When you are ready to add this line item to your requisition, click the **Add This Item** button at the bottom of the page.

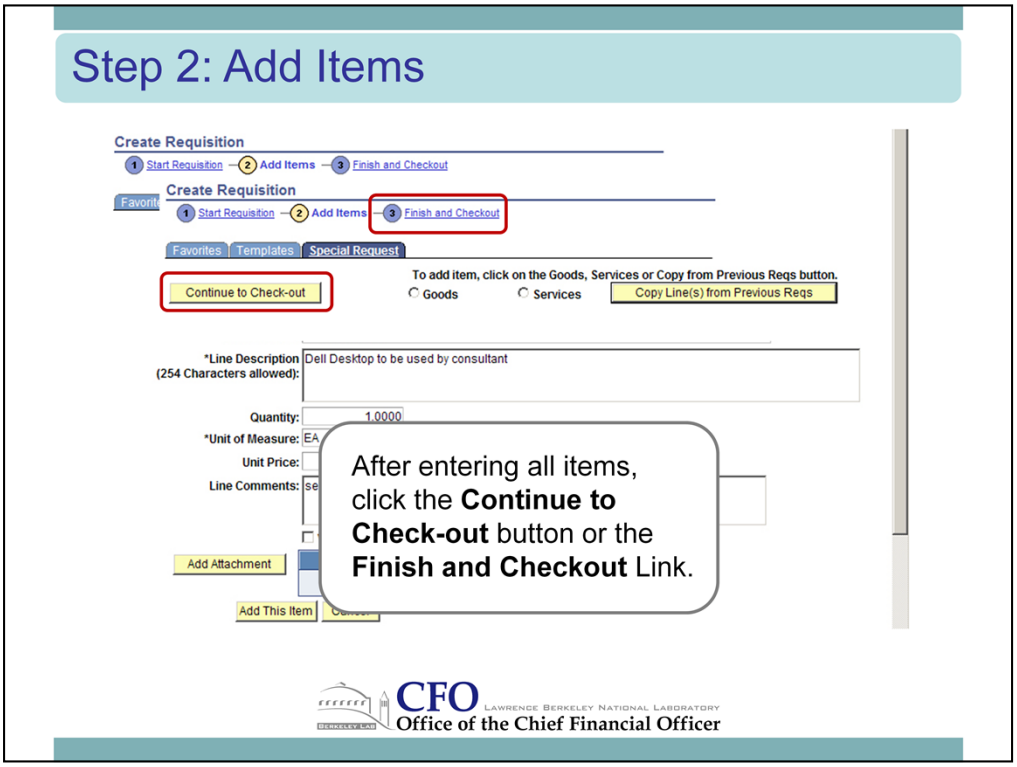


You are returned to the initial view of the **Special Request** tab, where you can either add another line item to your requisition, or continue on to **Step 3**, which is **Finish and Checkout**. Notice that a summary of your purchase requisition appears on the left side of the page. This will update every time you add a new item.

Before we move on to Step 3, let's take a look at the differences when you add a Good to your requisition. When you select the **Goods** option, you are presented with several fields that you must complete, similar to the Services fields. However, instead of Begin and End dates for the Services, here you can enter the date on which the goods are due. We've gone ahead and entered a due date of **November 15**.

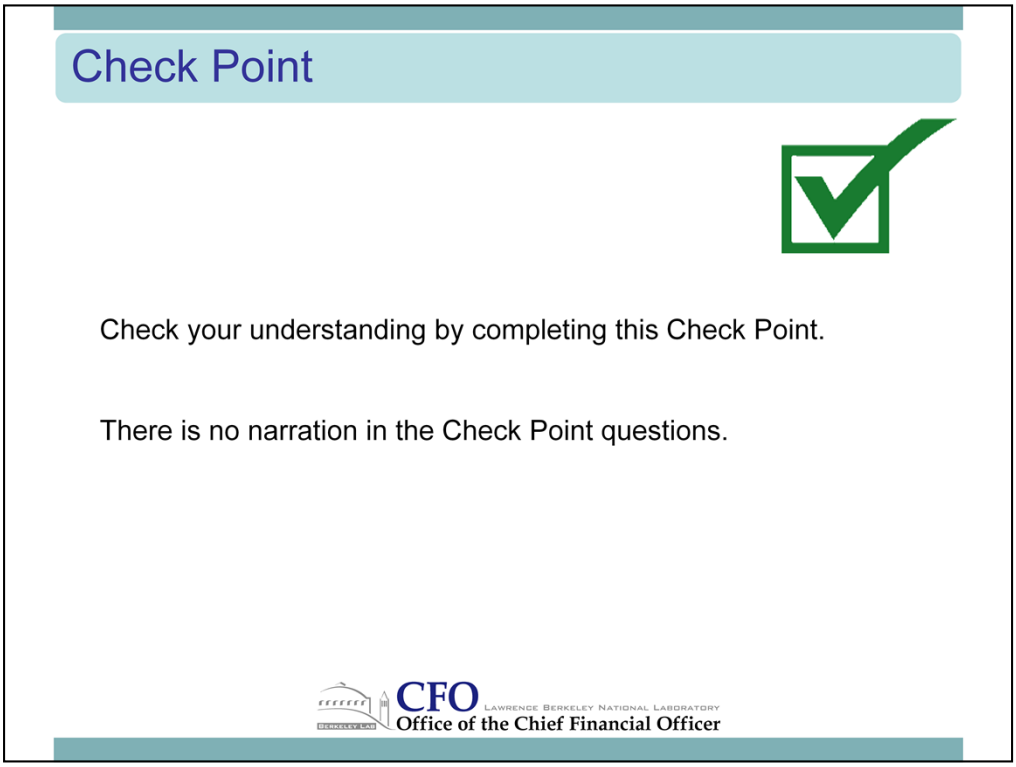
Again, you must select the proper item category code. Click the **Choose a Category** link to view a list of categories. You'll see here that the list of categories is different than it was when we chose Services. That's because the category lists are different for Goods and Services. Click the category that is most appropriate for your good. Remember, if you are unsure of what a category includes, you can hover the mouse pointer over the category to view a description.

Next, enter the Quantity, Unit of Measure, and Cost information for your good. For example, if you are purchasing 3 spools of wire at $250 a piece, you should enter **3** in the **Quantity** field, **spool** in the **Unit of Measure** field, and **250** in the **Unit Price** field. The system will calculate the total cost. Note that there are several different units of measure available in the system to choose from. Choose the one that most closely fits the good you are purchasing.

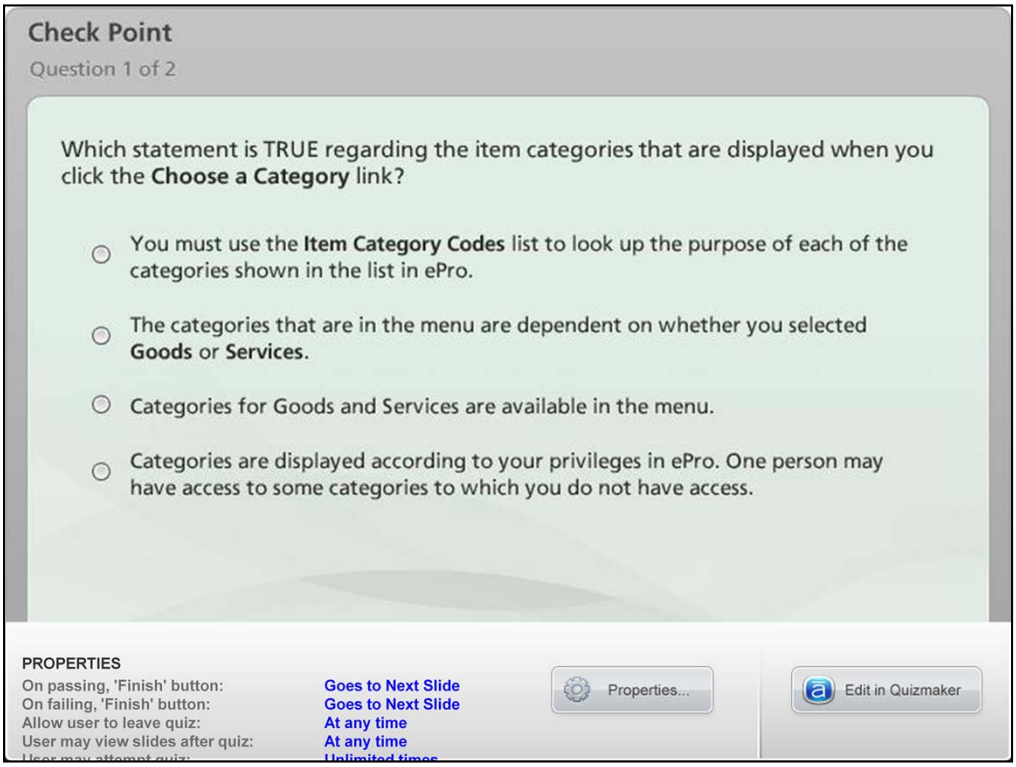


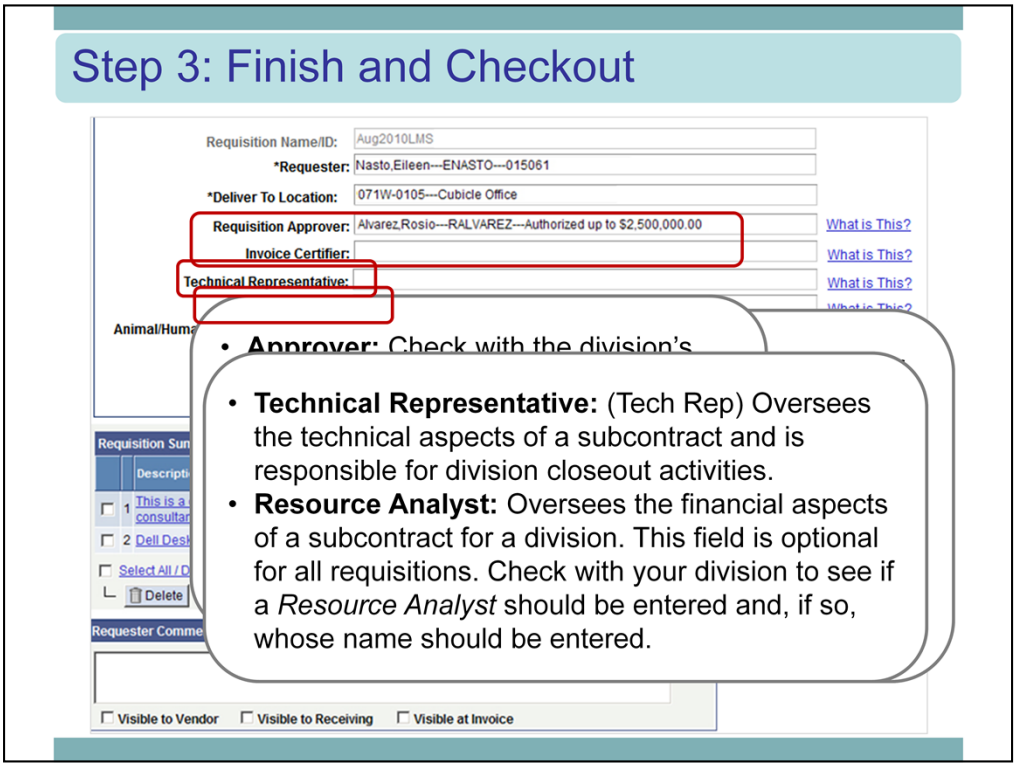
Enter a vendor part number, description, quantity, unit of measure, and price just as you would for Services. Also, submit an attachment if necessary and then click the **Add This Item** button.

When you have added all of the items you want to include in the purchase requisition, you are ready to move on to **Step 3: Finish and Checkout**. To move on, either click the **Continue to Check-out** button here or click the **Finish and Checkout** link on the top of the page.



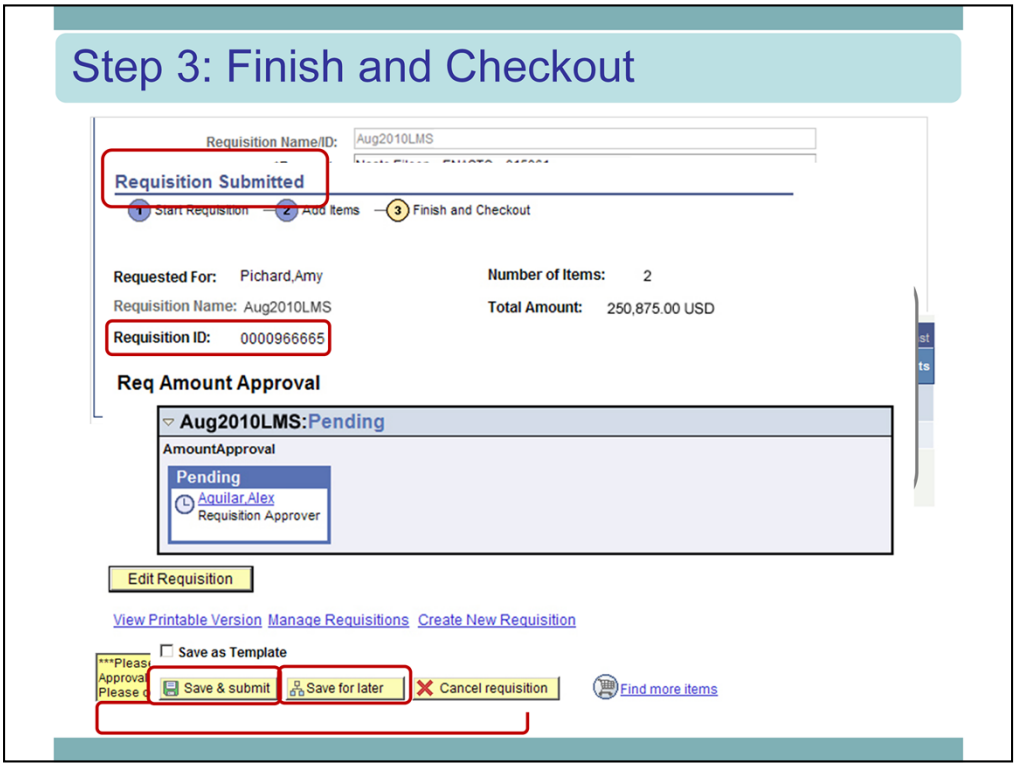
It’s time for another check point. When you are ready to begin, click the button on the player bar.


Check Point
Question 1 of 2
Which statement is TRUE regarding the item categories that are displayed when you click the Choose a Category link?
You must use the Item Category Codes list to look up the purpose of each of the categories shown in the list in ePro.
The categories that are in the menu are dependent on whether you selected Goods or Services.
Categories for Goods and Services are available in the menu.
Categories are displayed according to your privileges in ePro. One person may have access to some categories to which you do not have access.
PROPERTIES
On passing, 'Finish' button: Goes to Next Slide
On failing, 'Finish' button: Goes to Next Slide
Allow user to leave quiz: At any time
User may view slides after quiz: At any time
Properties...
Edit in Quizmaker

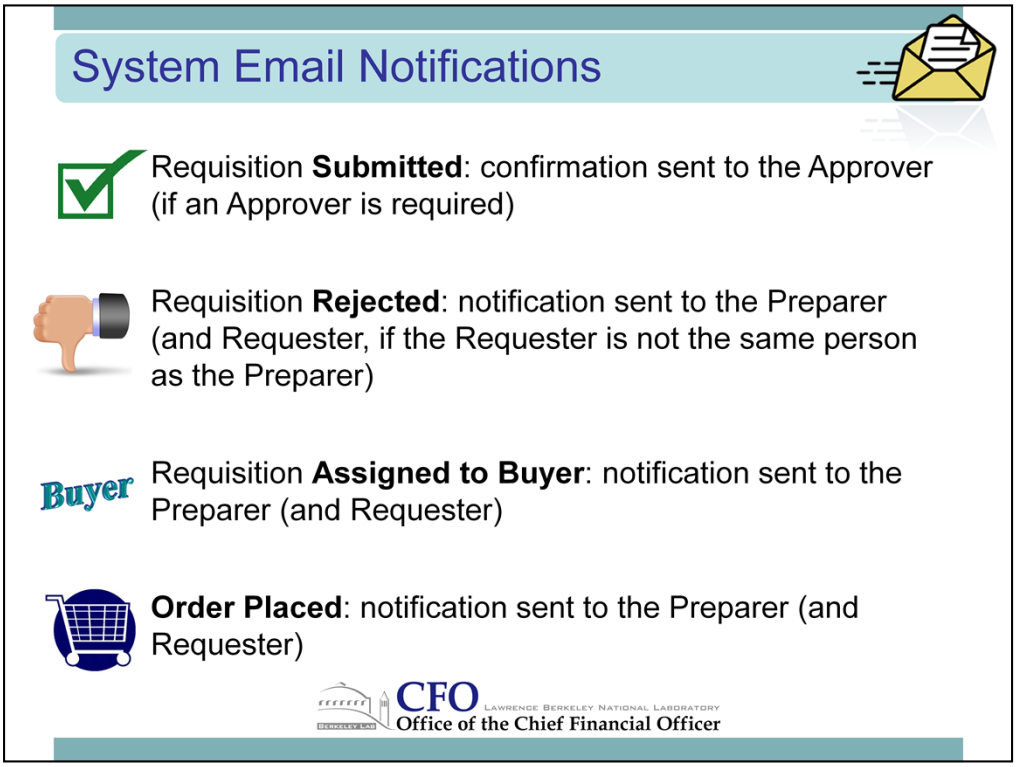


The Finish and Checkout page is basically a summarization of the entire purchase requisition. It re-displays the Requester and Deliver To location, and it lists each item being requested with quantities, costs, etc. In addition to this summary-type information, you can enter the names of the **Approver** and the **Certifier**. Check with your division's business manager if you are not sure who to select for your Approver. Normally it's recommended that you enter the Certifier name when one of these item category codes is selected: Architect and Engineering, Personal Service Agreement, Construction, Project Management, R&D, or Consultant. Consult the Attachments tab at the top of this course window for further information about Certifiers. A **Technical Representative**, or tech rep, is an individual at the Lab who oversees the technical aspects of a subcontract and is responsible for division closeout activities. A **Resource Analyst** is an individual who oversees the financial aspects of a subcontract for a division. The ePro Requisition Resource Analyst field is optional for all requisitions. Please check with your division to see if a Resource Analyst should be entered and, if so, whose name should be entered.

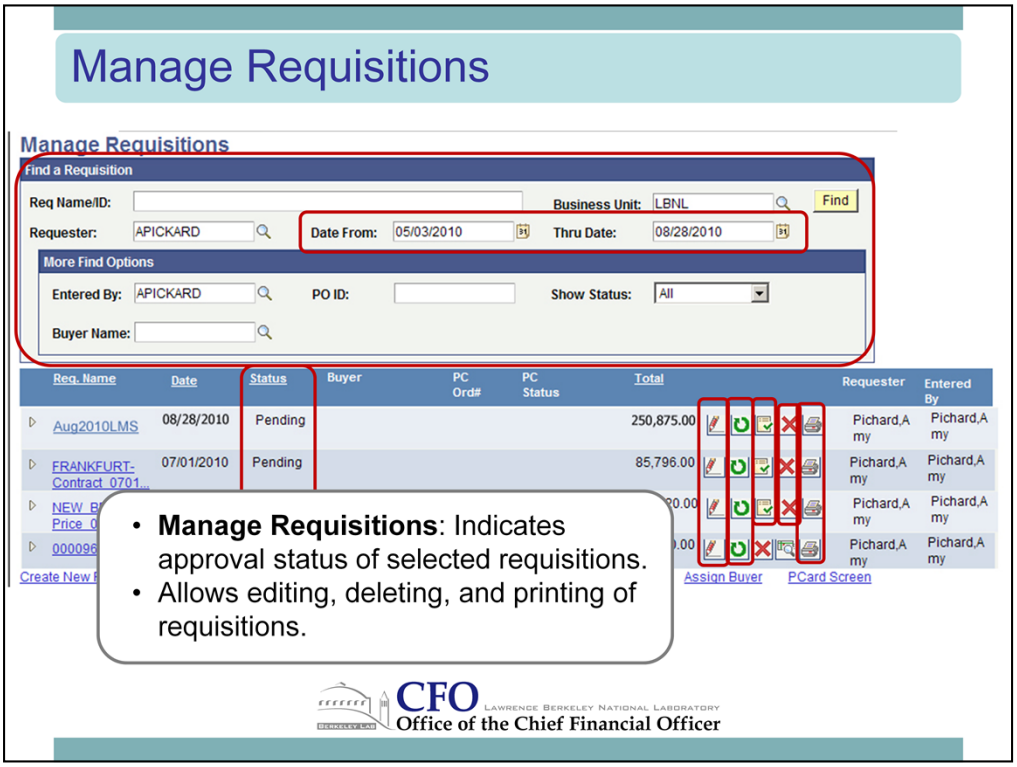
You can check the **Rush Order** box if you want your requisition to be expedited. When your requisition includes services, you can specify whether those services are to be provided on or off site and whether they are hands on or no hands on work. Refer to the definitions of hands on and no hands on work in the glossary.



At this time, it's a good idea to review all the information on this page. If you want to remove an item from the requisition, check the box next to the item and click the **Delete** button. If you want to edit an item, click its description. To quickly change the project ID by line item click the Project ID icon. After you've verified all information is correct in your requisition, enter any further comments you have about the requisition. Many people like to reiterate in the **Requester Comments** box when the requisition needs to be expedited. Others like to give more explanation about the purpose of the purchase or what the receiver is supposed to do with an item when it is delivered. If you want those comments to be visible to the Vendor, to Receiving, and/or the Lab's Accounts Payable department, check these boxes. To save the requisition without submitting it, click the **Save for later** button. Your requisition will be available to you from the Manage Requisitions page, which we will talk about in a moment. To submit your requisition, click the **Save & Submit** button. The system confirms that your requisition was submitted and provides you with a requisition number.



The eProcurement system sends notification emails at certain stages in the requisition cycle. The first email is sent to the Approver (if an approver was required) after the requisition is successfully submitted. Another email is sent to the Requester and Preparer if an Approver has rejected the requisition for one reason or another. A separate email is sent to the Requester and Preparer when the requisition is assigned to a Buyer as well as when the order has been placed with the Vendor. These system notifications prevent you from having to consistently log in to eProcurement to check the status.



Whether you submitted or saved your requisition for later, you will be able to follow-up on it using the Manage Requisitions page, which is accessible from the eProcurement home page. Use the options in the Find a Requisition box on the top portion of the Manage Requisitions page to filter by date and other information. All requisitions that match your search criteria, whether submitted, or saved, are listed. The Status column indicates where in the approval process they are. From this page you can edit a requisition, view the different stages in the requisition cycle, check the approval routing, delete a requisition and print a requisition.

Check Point

Check your understanding by completing this Check Point.

There is no narration in the Check Point questions.

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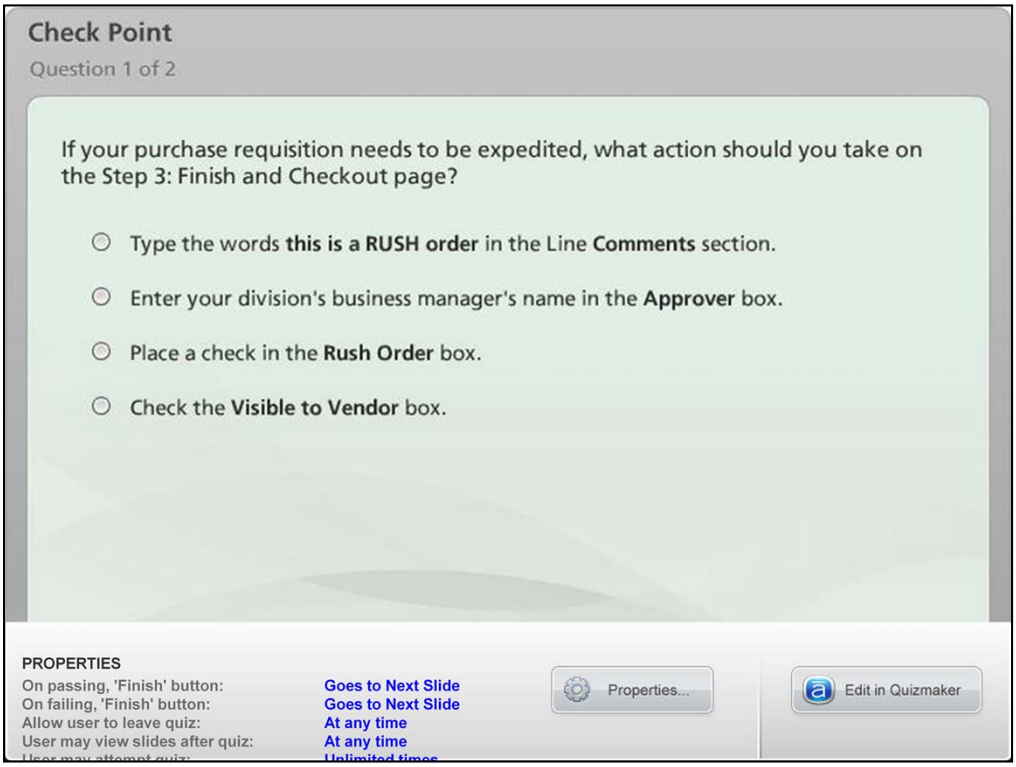
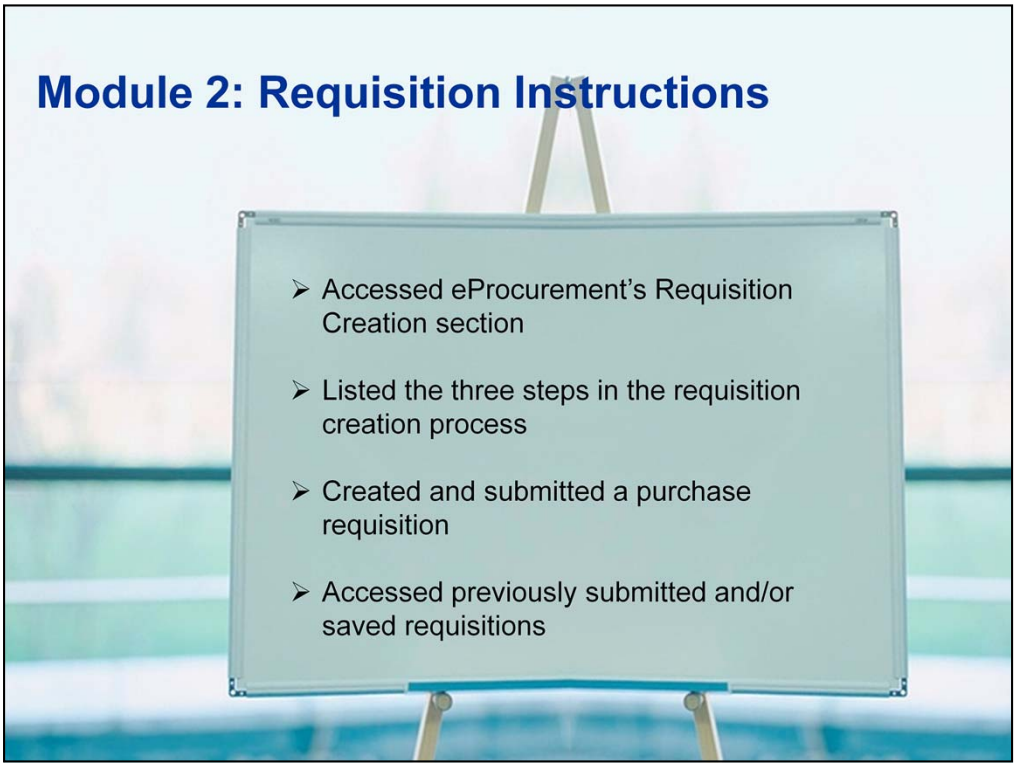
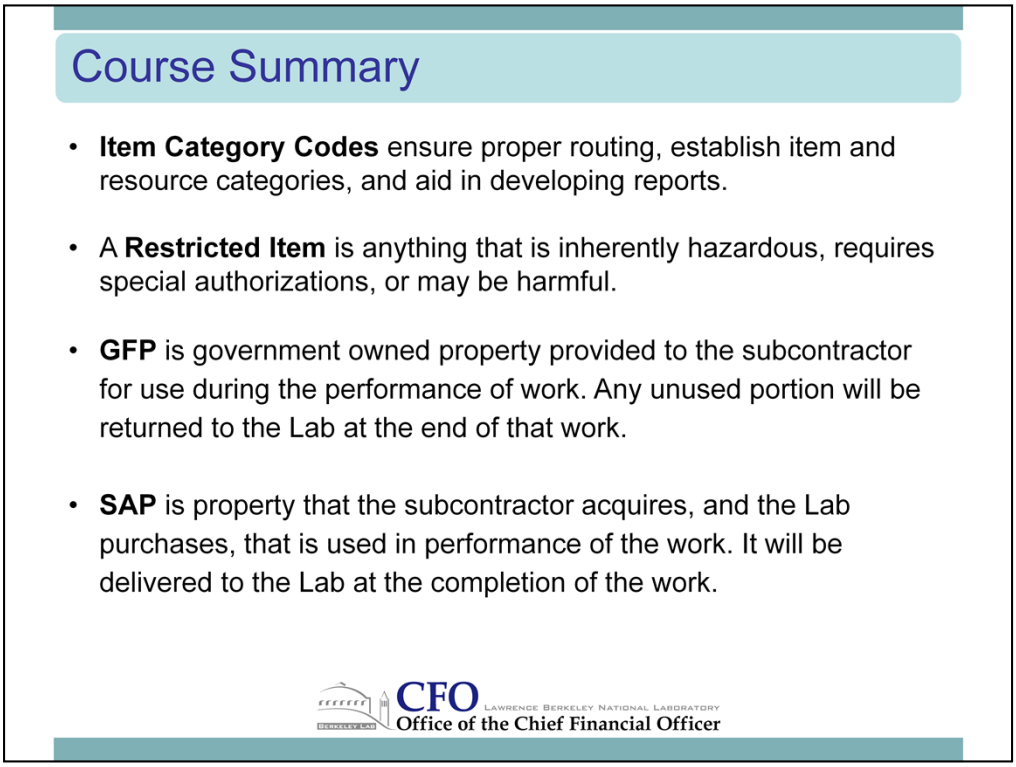

Check Point
Question 1 of 2
If your purchase requisition needs to be expedited, what action should you take on the Step 3: Finish and Checkout page?
Type the words this is a RUSH order in the Line Comments section.
Enter your division's business manager's name in the Approver box.
Place a check in the Rush Order box.
Check the Visible to Vendor box.
PROPERTIES
On passing, 'Finish' button: Goes to Next Slide
On failing, 'Finish' button: Goes to Next Slide
Allow user to leave quiz: At any time
User may view slides after quiz: At any time
Properties...
Edit in Quizmaker



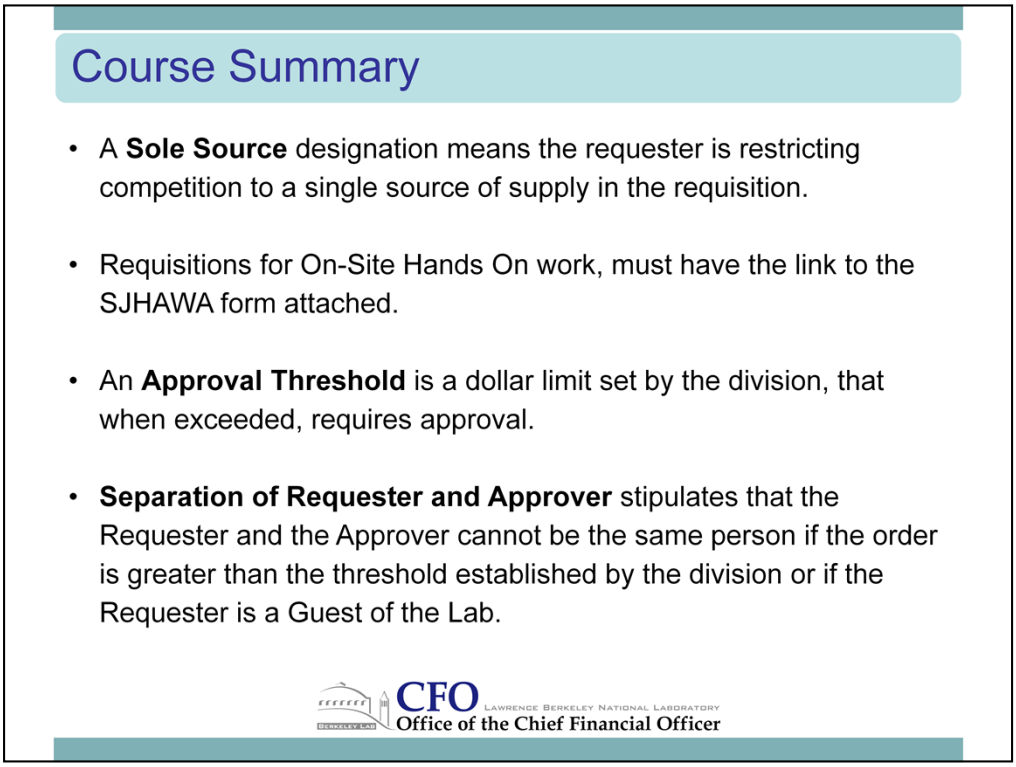
So now that we've reached the end of Module 2, let's briefly recap what we've learned so far. We accessed the requisition creation section from within eProcurement. We reviewed the three steps of creating a purchase requisition. We created and submitted a requisition. And we accessed submitted and saved requisitions on the Manage Requisitions page.

Hopefully this course has put you well on your way to being able to effectively create a purchase requisition. But if for any reason you have questions, you can contact the Procurement Help Desk at extension 6400.



To this point, we have discussed the concepts of purchase requisition creation as well as how to create a purchase requisition in the eProcurement system. Now it's time to take just a few moments to review the key points that we learned in this course before continuing on to the scored exam.

- **Item Category Codes** ensure proper routing, establish item and resource categories, and aid in developing reports.
- A **Restricted Item** is anything that is inherently hazardous, requires special authorizations, or may be harmful.
- **GFP** is government owned property provided to the subcontractor for use during the performance of work. Any unused portion will be returned to the Lab at the end of that work.
- **SAP** is property that the subcontractor acquires, and the Lab purchases, that is used in performance of the work. It will be delivered to the Lab at the completion of the work.



- A **Sole Source** designation means the requester is restricting competition to a single source of supply in the requisition.
- Requisitions for On-Site Hands On work, must have the link to the SJHAWA form attached.
- An **Approval Threshold** is a dollar limit set by the division, that when exceeded, requires approval.
- **Separation of Requester and Approver** stipulates that the Requester and the Approver cannot be the same person if the order is greater than the threshold established by the division or if the Requester is a Guest of the Lab.

Course Summary

- Access the **Create Requisition** and the **Manage Requisitions** functionality on the eProcurement home page.
- Creating a purchase requisition is a 3-step process:
  1. Start Requisition
  2. Add Items
  3. Finish and Checkout
- You can save a purchase requisition without submitting it, and then later access that requisition on the Manage Requisitions page.
- Use the Manage Requisitions page to edit, view the status of, print, and delete requisitions that you have saved and/or submitted.

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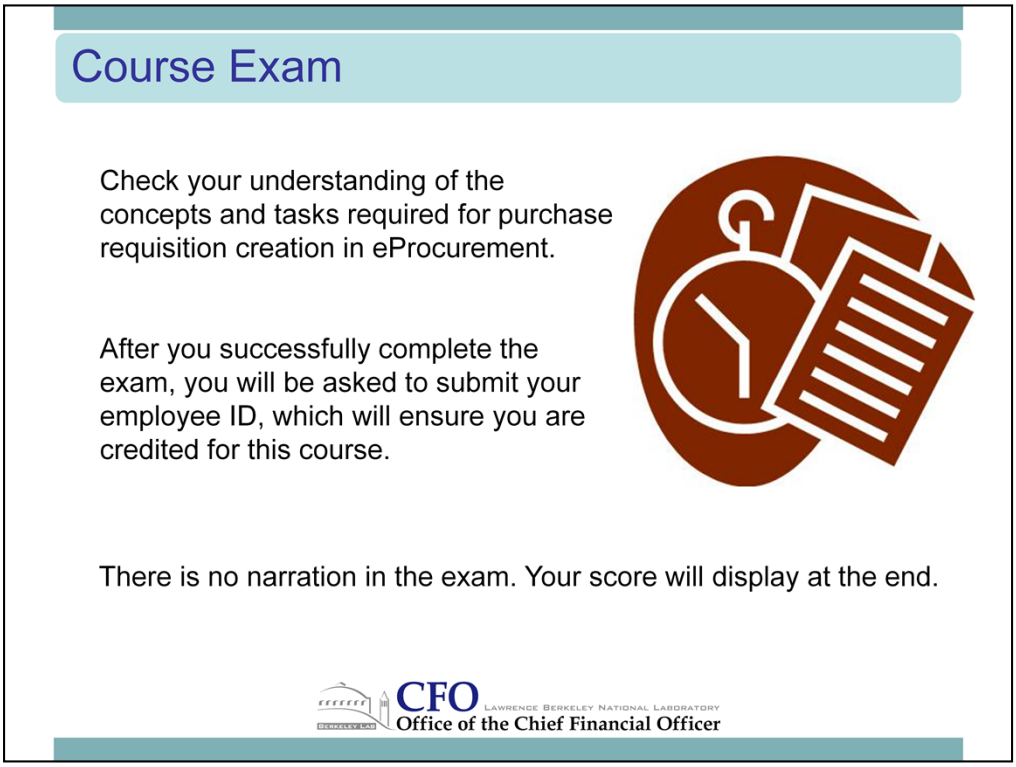
You access the Create Requisition and Manage Requisitions functionality on the eProcurement home page.

Purchase requisition creation is a 3-part process: start the requisition, add items to it, then finish and check out.

You can save a purchase requisition without submitting it. Later, you can access the saved requisition on the Manage Requisitions page.

The Manage Requisitions page is used to access saved and submitted requisitions so you can edit them, view their status, print them, or even delete them.

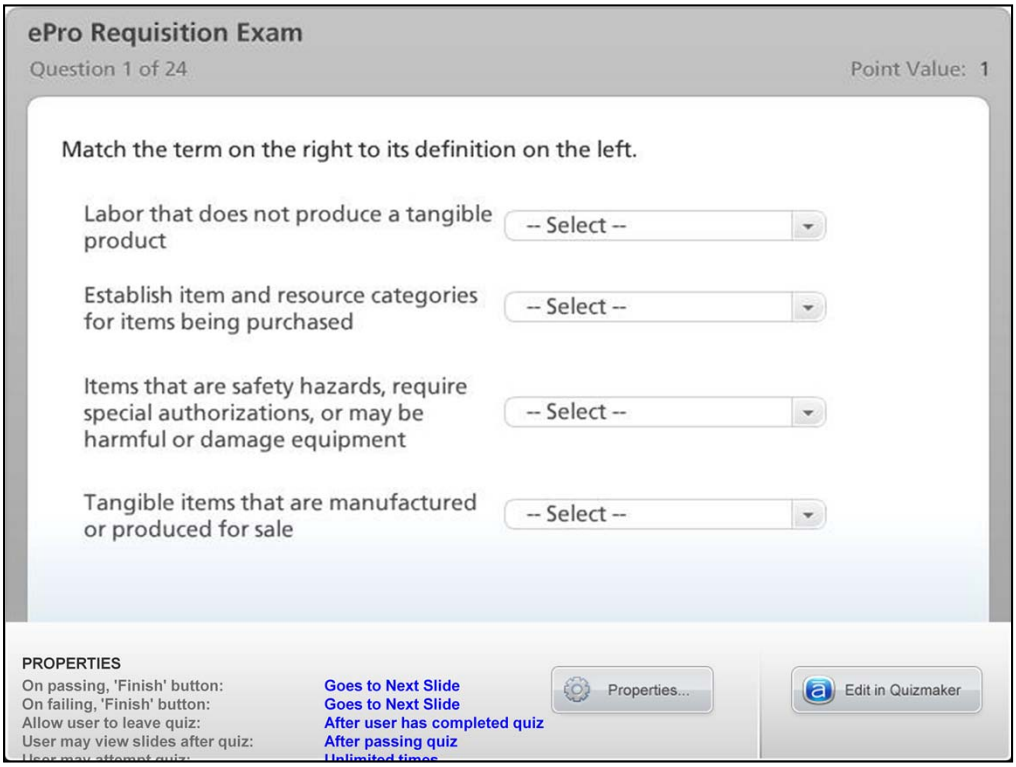


Now it's time to assess your understanding of the concepts and tasks required for purchase requisition creation in eProcurement through the course exam.

You must successfully complete the exam to obtain credit for this course. After you complete the exam, you will be asked to submit your employee ID, which will ensure you are properly credited.

There is no narration in the exam and your score will display at the end.

Click the button on the player bar to begin.


ePro Requisition Exam
Question 1 of 24
Point Value: 1
Match the term on the right to its definition on the left.
Labor that does not produce a tangible product
-- Select --
Establish item and resource categories for items being purchased
-- Select --
Items that are safety hazards, require special authorizations, or may be harmful or damage equipment
-- Select --
Tangible items that are manufactured or produced for sale
-- Select --
PROPERTIES
On passing, 'Finish' button:
Goes to Next Slide
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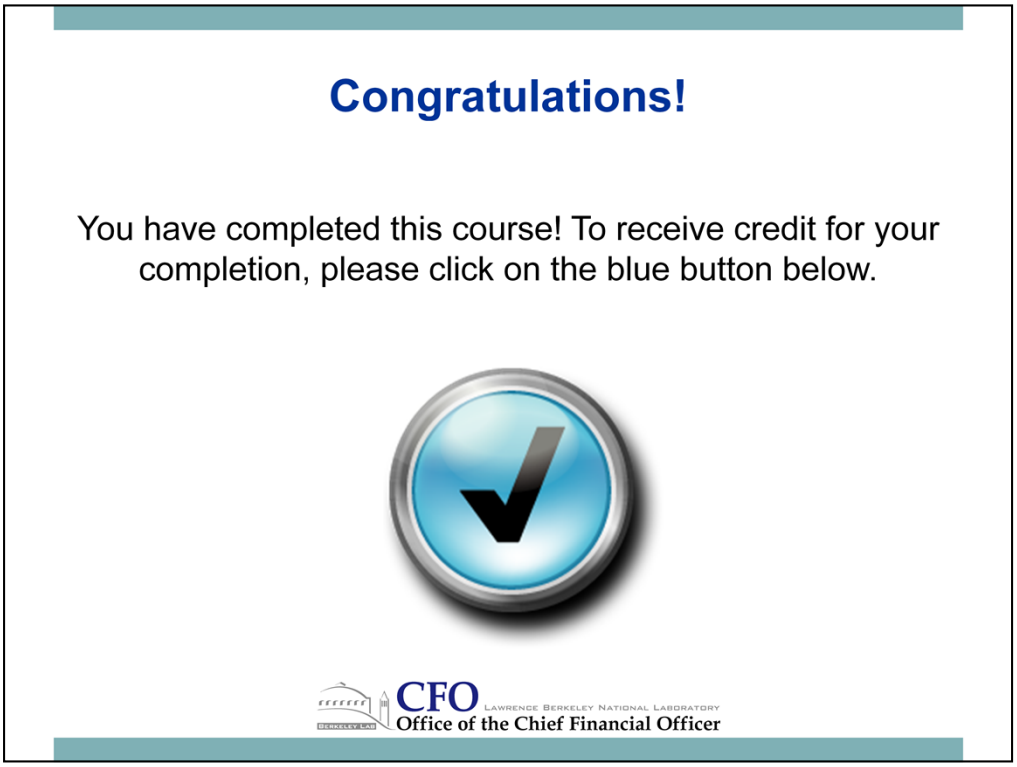

Congratulations! You have now completed this course! To obtain credit for your completion, please click on the button with the checkmark, which will take you to the course credit page. Thank you for your commitment to continuing your education at Lawrence Berkeley National Laboratory.

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To exit this course, please click on the Exit button found on the top right corner of your screen. Thank you!