

Special Edition - REQUISITIONS

Let's Start at the Very Beginning....

Did you know?—Asset ID information is generated from the information provided in purchase orders. If you are trained in ePro, you can save yourself time conducting inventory maintenance by including additional information within your requisitions. If you do not place orders for your department, consider working closely with the person who does... More information up front = cleaner reports and streamlined inventory practices.

In the initial setup of a requisition, you will land on this screen:

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- A "Ship To" is the location the vendor will ship the order to. Any assets should automatically go to USB 135 (central campus receiving) or NTRP H142 (Discovery Park receiving) for tagging by Asset Management prior to delivery. All assets (controlled or capital) are considered restricted items, and must be purchased via requisition (please see Procurement's P-Card Program Guide for more info).
- **B** "Location" is the specific place on campus Asset Management will delivery your orders to. This field is <u>very important</u> for ensuring your orders don't go to the wrong place! In most cases, this field will default to your office. The Location field also has another key purpose—inventory location. If you know the inventory location upon placing the order, you can enter it for a specific line. Otherwise, you will have to wait until the order has been placed, delivered, paid, and processed for inventory before making such updates. If you do not know the building mnemonic, click the magnifying glass to search by description. **NOTE: The Location field does not affect the vendor shipping address.
- **C** If your order is oversized or requires special handling by the vendor, you can set a specific delivery location for direct shipment. For these type of orders, assets can be tagged on site, rather than at the Central Receiving warehouse.
- D "Attention" specifies the point of contact for delivery.

Central Receiving, this 'special edition' Eagle Eye focuses entirely on the requisition.

With over 65% of the requisitions being incorrect and/or incomplete as seen at

We continue to find that many problems with the requisition, purchase, receiving, inventory control and maintenance of an item may have been avoided in the beginning, if the requisition would have been properly completed with as much information as possible.

Thank you to Ryan for putting this together last year to help us all be more efficient in the requisition process.

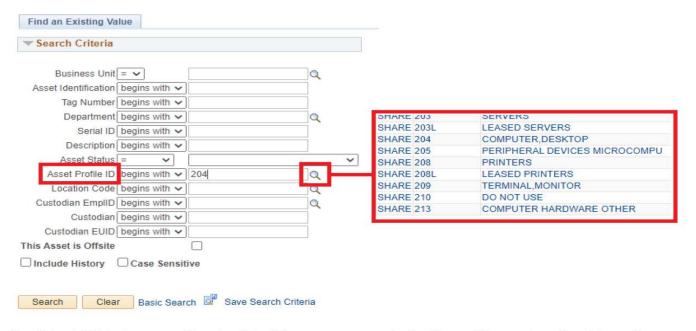
THESE FIRST STEPS ARE CRUCIAL IN PROPER FINAL DELIVERY OF YOUR ITEMS

Next....

After completed the initial setup of your requisition, you will reach the checkout screen:

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E — "Profile ID" is a little-known tool that has significant potential for inventory coordinators. This field is typically generated automatically from the <u>Category Code</u>, and provides a way to sort inventory items by type. If you wish to review the Profile ID for accuracy, you can find it under the <u>Accounting Lines</u> dropdown menu in the <u>Asset Information</u> tab. When searching for inventory items in EIS, you can utilize the assigned ID to look for a list of all your computers, vehicles, microscopes... anything!



F – "Empl ID" is the custodian the (single) asset on a particular line will be assigned to. Yes—that means you can enter it before the item is even delivered! Once the asset appears on your inventory, this info will already be assigned, and no further action is required.

The Eagle Eye

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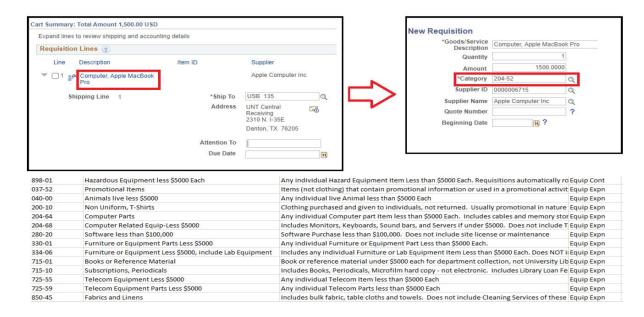
Lastly....

Category Codes are an important part of the procurement process. As the name suggests, the codes are split items into categories which determine D-Level/5-digit accounts and Profile ID assignments (discussed earlier). The codes also serve one other purpose—<u>asset identification</u>. Certain codes automatically flag items for inspection and tagging in the receiving process. If a non-asset code is used for a controlled/capital item, it may bypass the inspection process, causing it to not appear on your inventory.

If you submit ePro requisitions for your department, these codes can be entered into each line by clicking the name of the item in the checkout phase. You may be wondering, how do I know which code to use? EIS has a built-in search function, but it is strongly recommended that you use the Category Tool for reference, available on the System Procurement Website. This spreadsheet provides much more info, including examples of which kinds of items fall under each category. If your requisition has multiple lines that are all part of one main capital asset system, the same code may be used for each line.

**NOTE: Requisitions using grant funds may have specific category code requirements. Contact System Purchasing for more information.

Category codes are reviewed by the **University Budget Office** as part of the requisition approval process. For questions on which codes to use, please contact Asima Chauhan (asima.chauhan@unt.edu).



Inventory 101 - Knowing what you got and where it's at.....at all times!

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