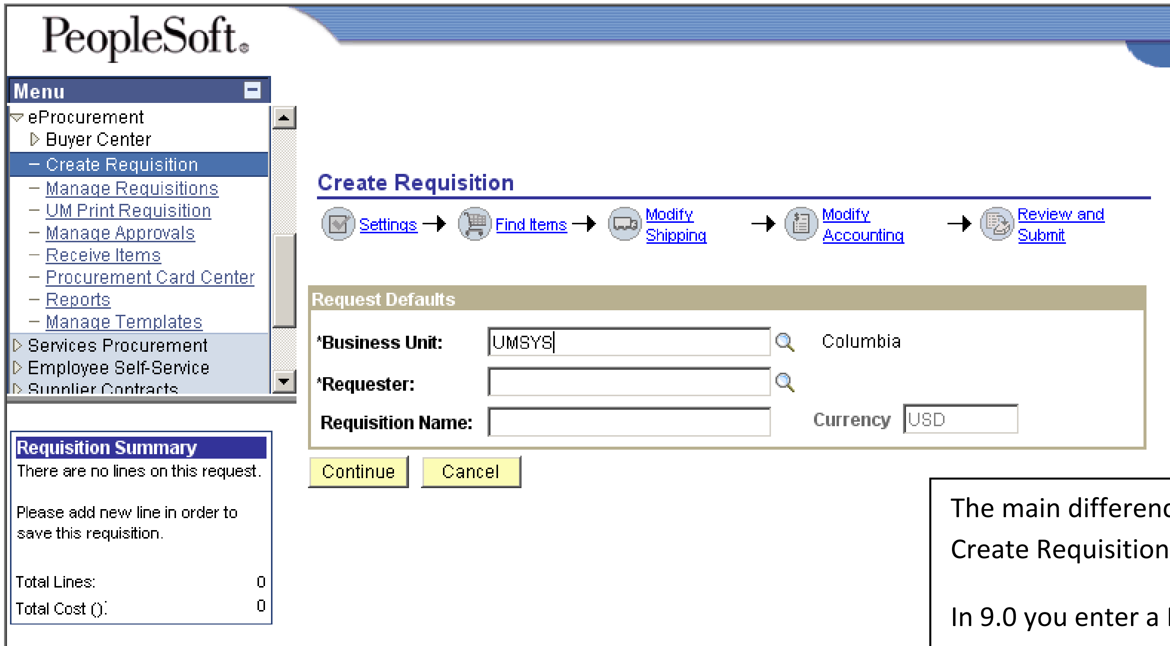
ePro Requisitioning Changes version 8.8 to version 9.0

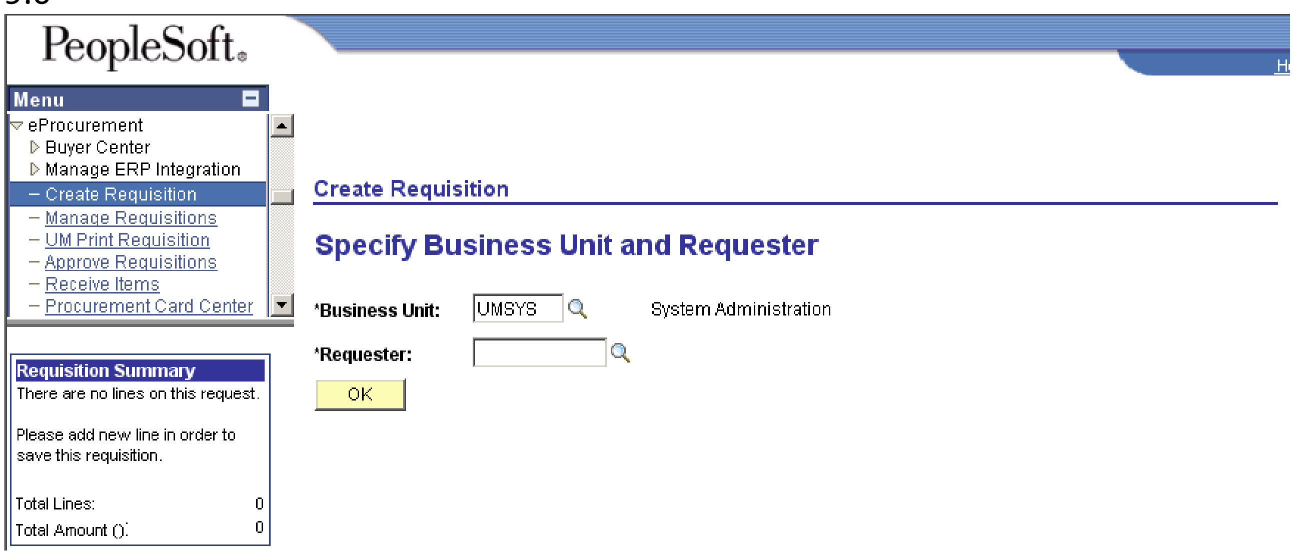
8.8



The main difference between 8.8 and 9.0 on the initial Create Requisition page is the appearance.

In 9.0 you enter a Requisition Name on another page after the Business Unit and Requester are entered.

9.0

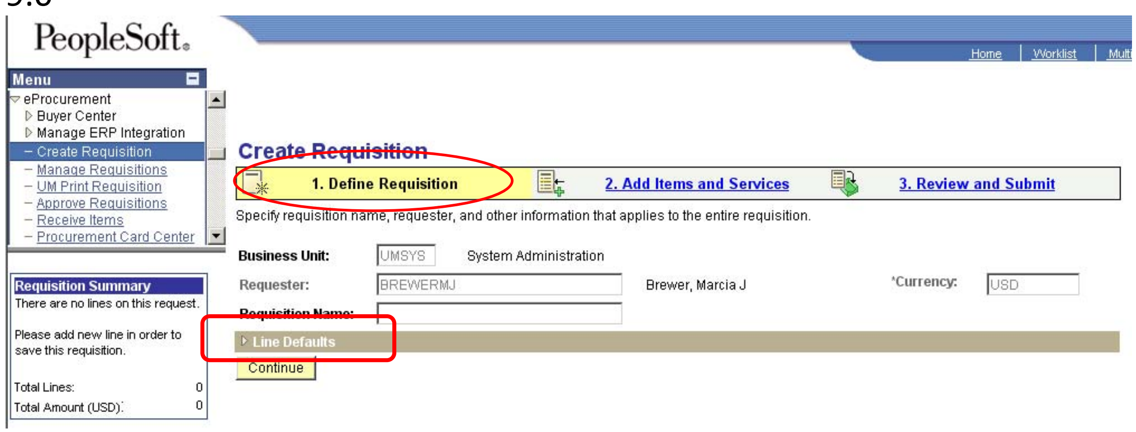


8.8

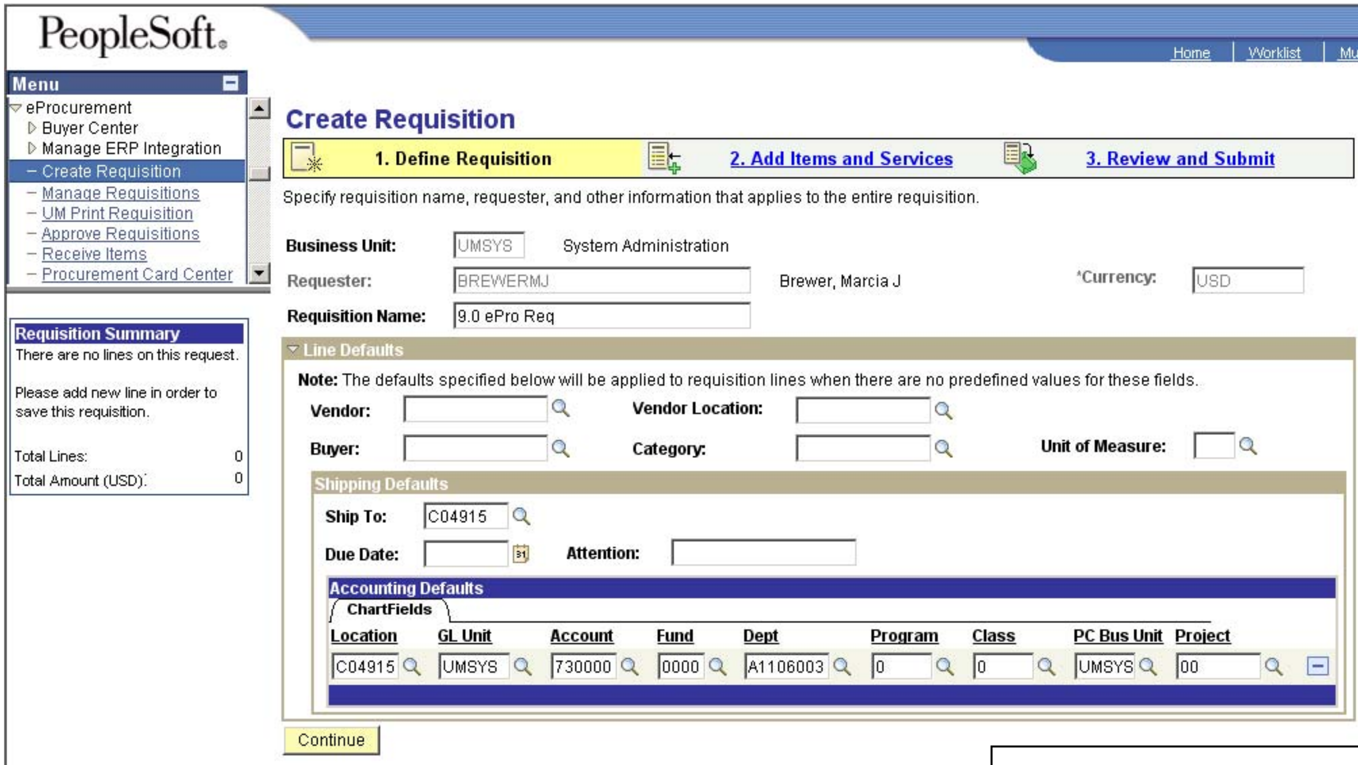
In 8.8 you chose the Override Option on the Settings page to override the chartfield and ship to code defaults associated with your UserID and/or split fund. That is not necessary in 9.0.

The Define Requisition page in 9.0 contains the default fields. Expand the Line Defaults by clicking the arrow. Making changes on Define Requisition page is optional, so you could skip expanding Line Defaults and click Continue.

9.0



9.0



Data entry on this page is optional. For a non-catalog requisition, you can enter the buyer name, category, and unit of measure, which will be carried over to each line item as long as you make changes here first before entering any line items.

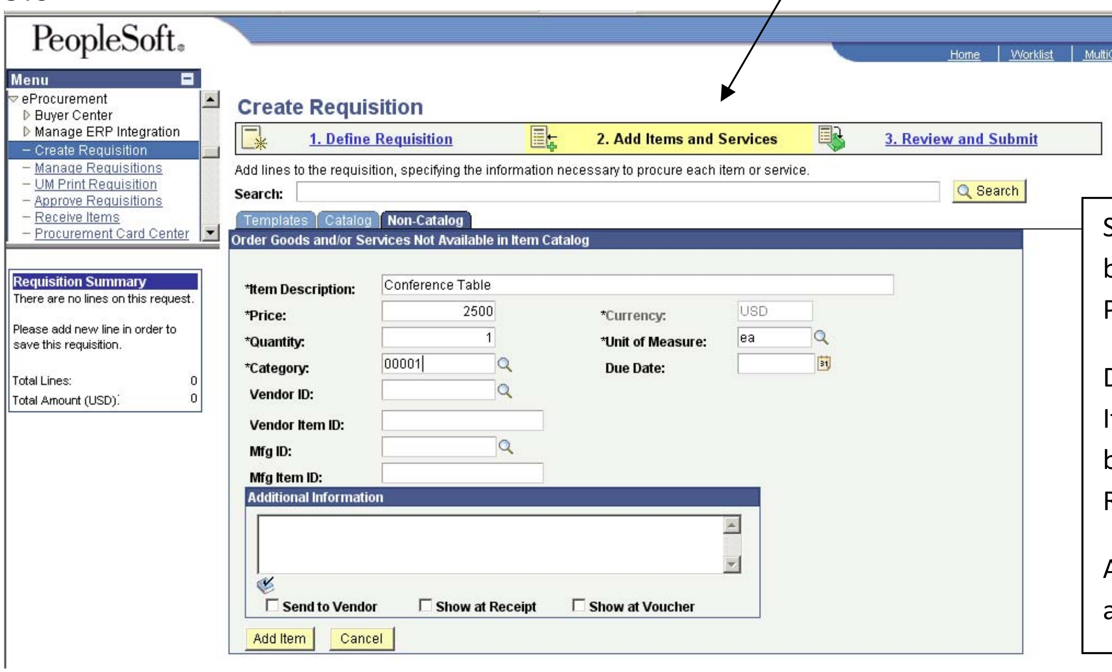
It is NOT recommend making chartfield changes here because you cannot use MoCode and cannot split-fund.

8.8

The Find Items page in 8.8 now changes to Add Items and Services in 9.0. The appearance is slightly different, but the type of items you can enter remain the same: Non-Catalog Items, Catalog Items, and Template Items.

The information contained in the Catalog and Templates tabs has not changed.

9.0

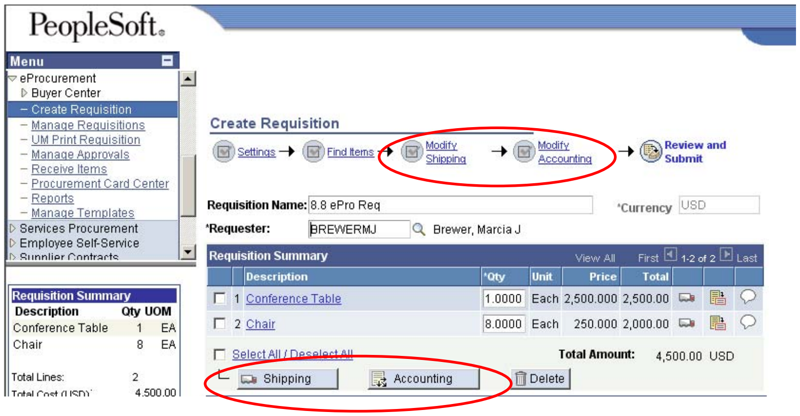


Some fields on the non-catalog item tab changed position, but the required fields remain the same: Item Description, Price, Quantity, Unit of Measure, and Category.

Do not enter Vendor ID, Vendor Item ID, Mfg ID, and Mfg Item ID. To identify the vendor to be used on the bid/order, enter it in the Justification Comments on the Review and Submit page.

Additional Information is an area to enter comments that are specific to the line item being entered.

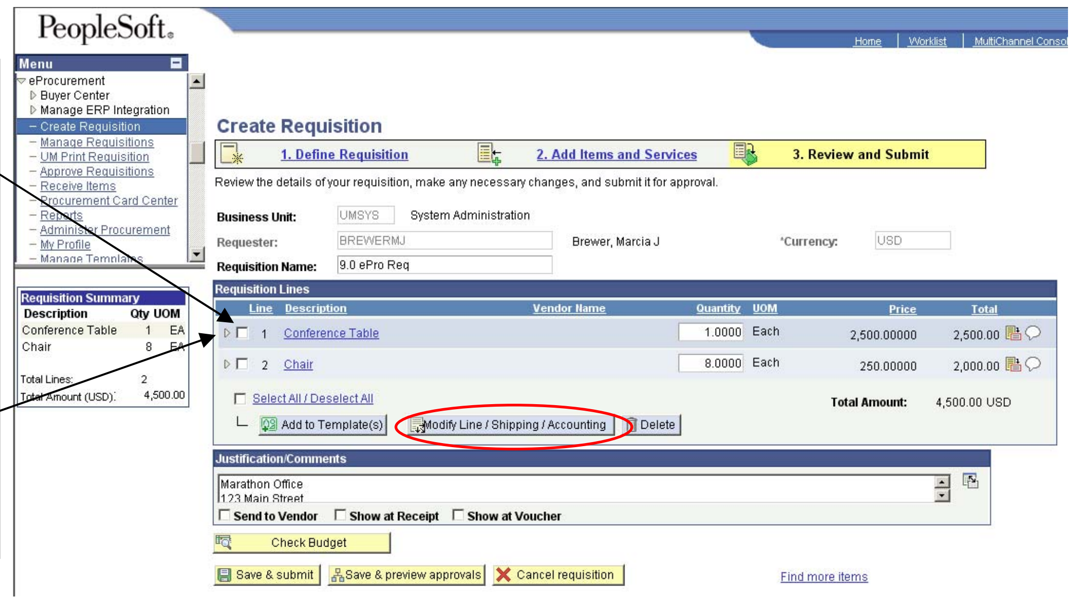
8.8



The Review and Submit page changed slightly from 8.8 to 9.0.

The Modify Shipping and Modify Accounting links at the top of the page and the Shipping and Accounting buttons below the line item in 8.8 changed to a single button called Modify Line/Shipping/Accounting under the line items in 9.0.

9.0



You can access line distribution information in two ways.

1. Select the line items to be changed by clicking in the box to the left and click the Modify Line/Shipping/Accounting button; you can select more than one line if the changes you will make apply to all of the selected lines.

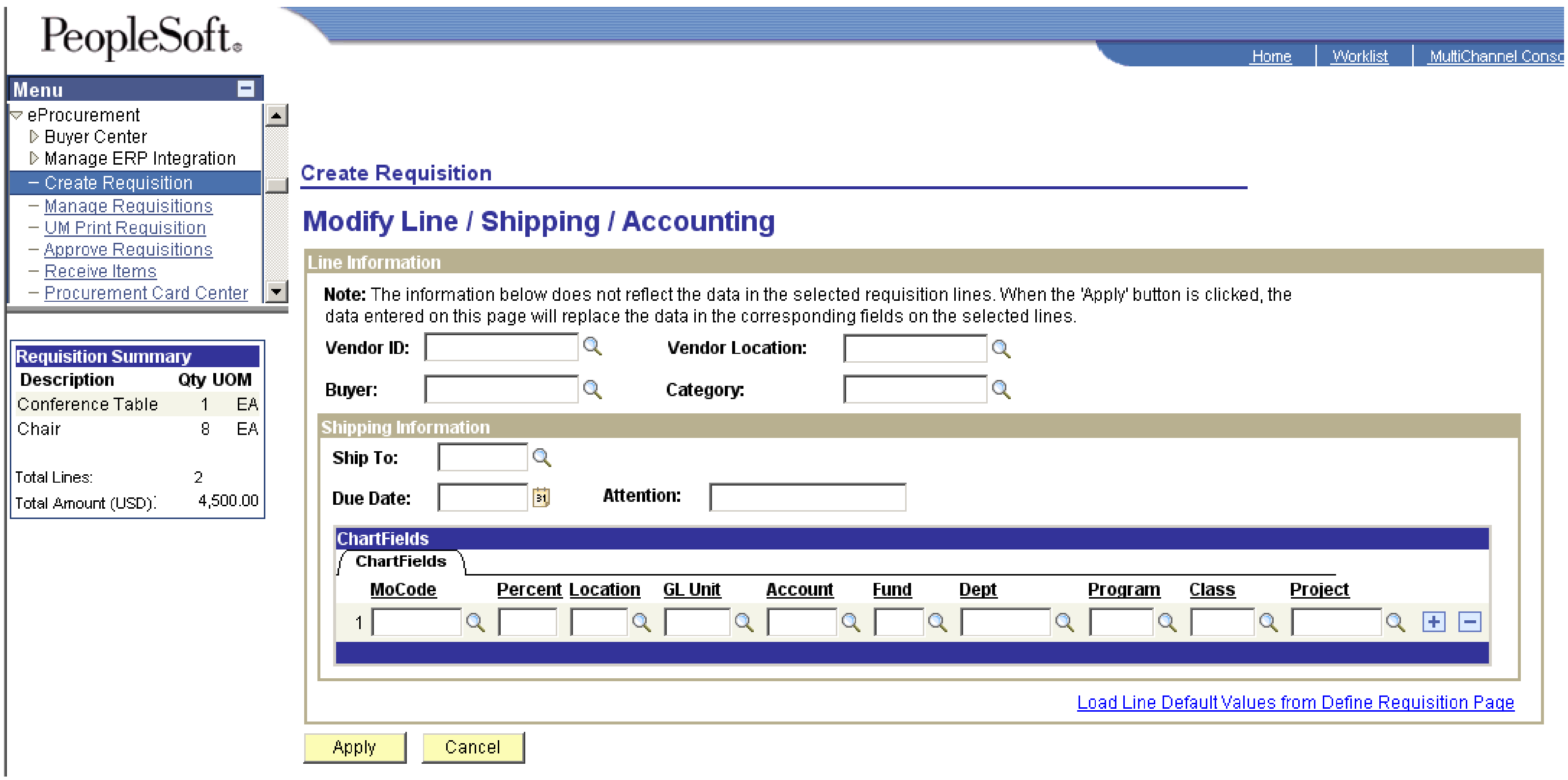
OR

2. Click the arrow on the far left of the line to expand the line section, which contains information applicable only to that individual line.

9.0

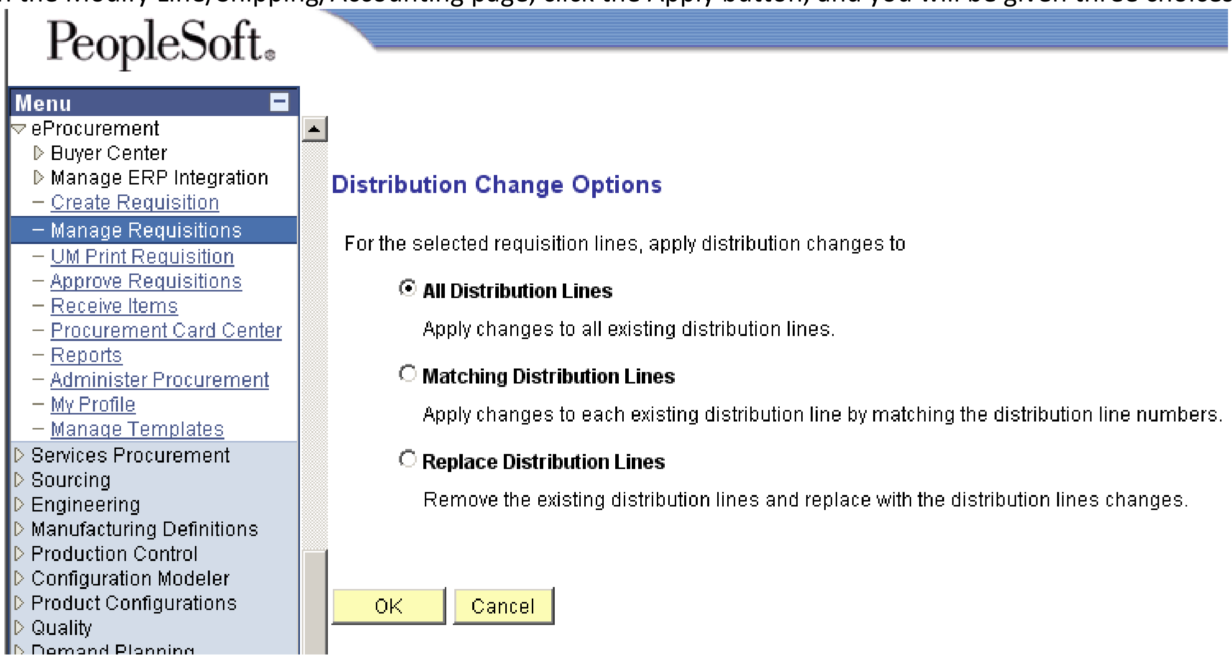
This is the Modify Line/Shipping /Accounting page for the selected lines from the Review and Submit page. You can split fund selected lines and use MoCode for each distribution line. The MoCode entered is not retained in the field after the requisition is saved. Account is not part of MoCode, so you must enter an account.

Caution: When line items are created, they are assigned the default chartfield and Ship To values from the Define Requisition page. The defaults will not appear on this page, so if you want to use the Line Default Values from the Define Requisition page and split fund with another chartfield string/MoCode, you can click Load Line Default Values from Define Requisition Page hyperlink to populate the row and then make applicable changes. After changes are made on this page, do NOT return to this page to verify/review the changes made. Each time you access this page, it will be blank. Another page is used to verify/review chartfield and Ship To code values associated with each individual line.



9.0

After making changes on the Modify Line/Shipping/Accounting page, click the Apply button, and you will be given three choices…



All Distribution Lines: Use to apply field changes from what was originally populated in the field(s) for the selected lines. This will only affect the fields that are modified.

Matching Distribution Lines: DO NOT USE THIS OPTION

Replace Distribution Lines: Use to replace all of the existing distribution information with what was entered on the Modify Line/Shipping/Accounting page. This should only be used if you are replacing all fields with new values to be applied to all selected lines.

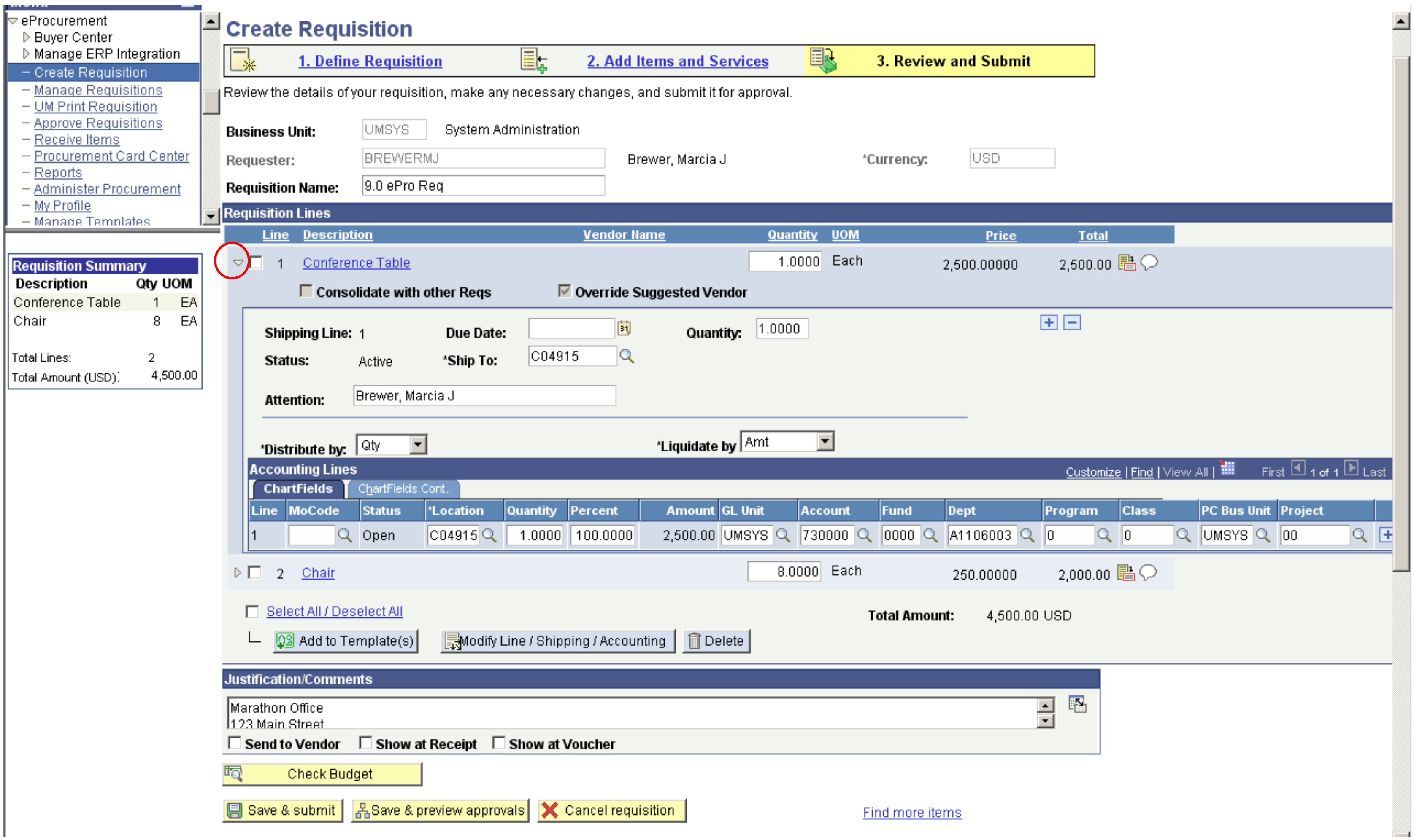
EXAMPLE: If you only want to change the account for selected items on the Modify Line/Shipping/Accounting page but not all other chartfield fields, you would make the change to the account field, leave the other chartfield fields blank, click Apply, and then choose All Distribution Lines – the new account will be reflected on the line item and all other fields would be unchanged. If instead you choose Replace Distribution lines, the account field would be changed and all other chartfield fields except the DeptID would be blank on the selected lines, resulting in an incomplete requisition that cannot be saved.

CAUTION: You cannot use Modify Line/Shipping/Accounting to make changes if you previously split funded the line. To make changes to a line that has been split funded, you must do it on the individual line as explained next.

9.0

This page shows the line section expanded for line item 1 after clicking the arrow on the far left of the line (this function replaces the “truck” icon used in 8.8 to make changes to an individual line). Changes made in the expanded line section only apply to that individual line item. You can also use MoCode and add additional distribution lines to split fund. The MoCode entered is not retained in the field after the requisition is saved. Account is not part of MoCode, so you must enter an account.

The expanded line section can be used to verify if changes made using the Modify Line/Shipping/Accounting button were applied to the line(s) correctly.

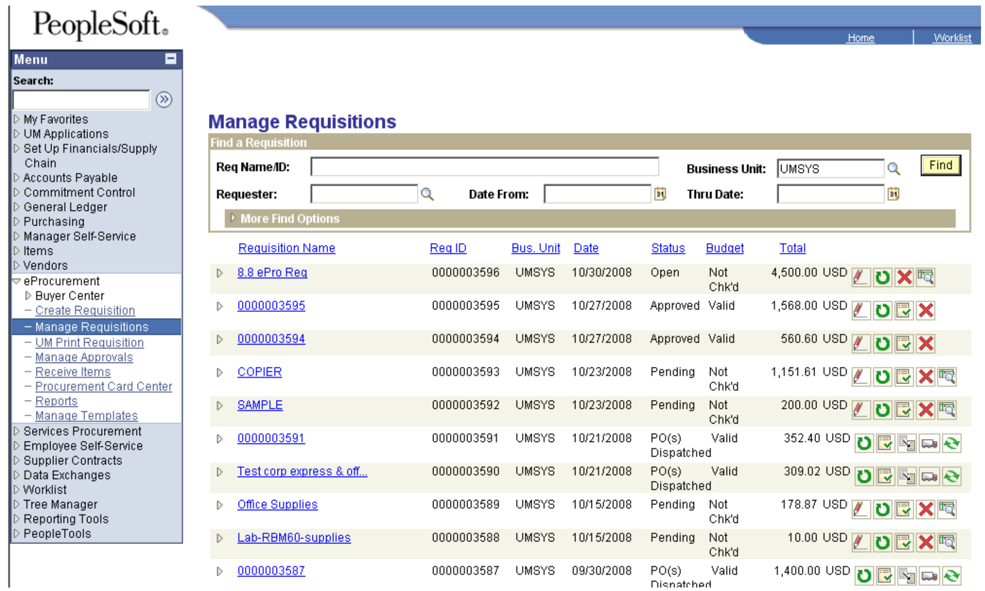


8.8 Manage Requisitions included icons at the end of each row for various actions for a specific requisition.

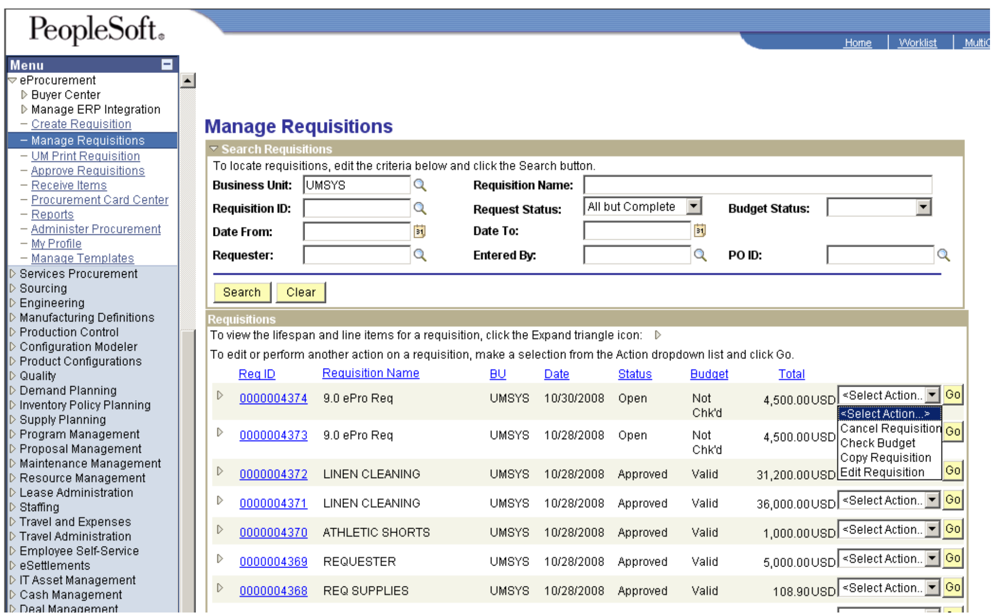
9.0 Manage Requisitions changed to a Select Action drop-down menu instead of icons.

Not all actions are available; what you will see is dependent on the status of the requisition and the security rights associated with your UserID.

8.8



9.0



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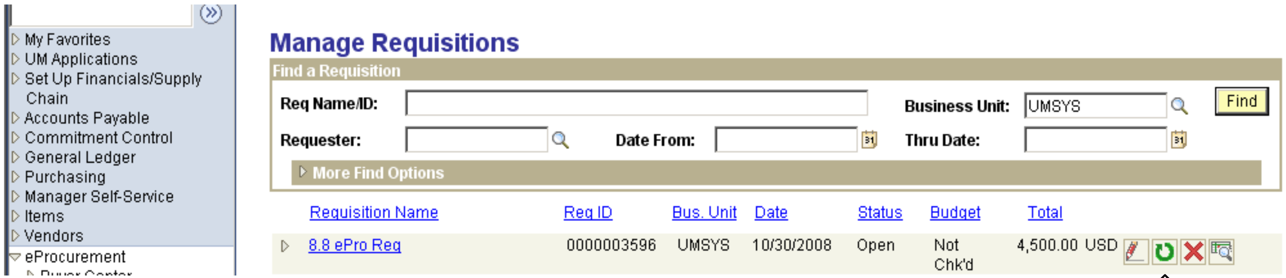

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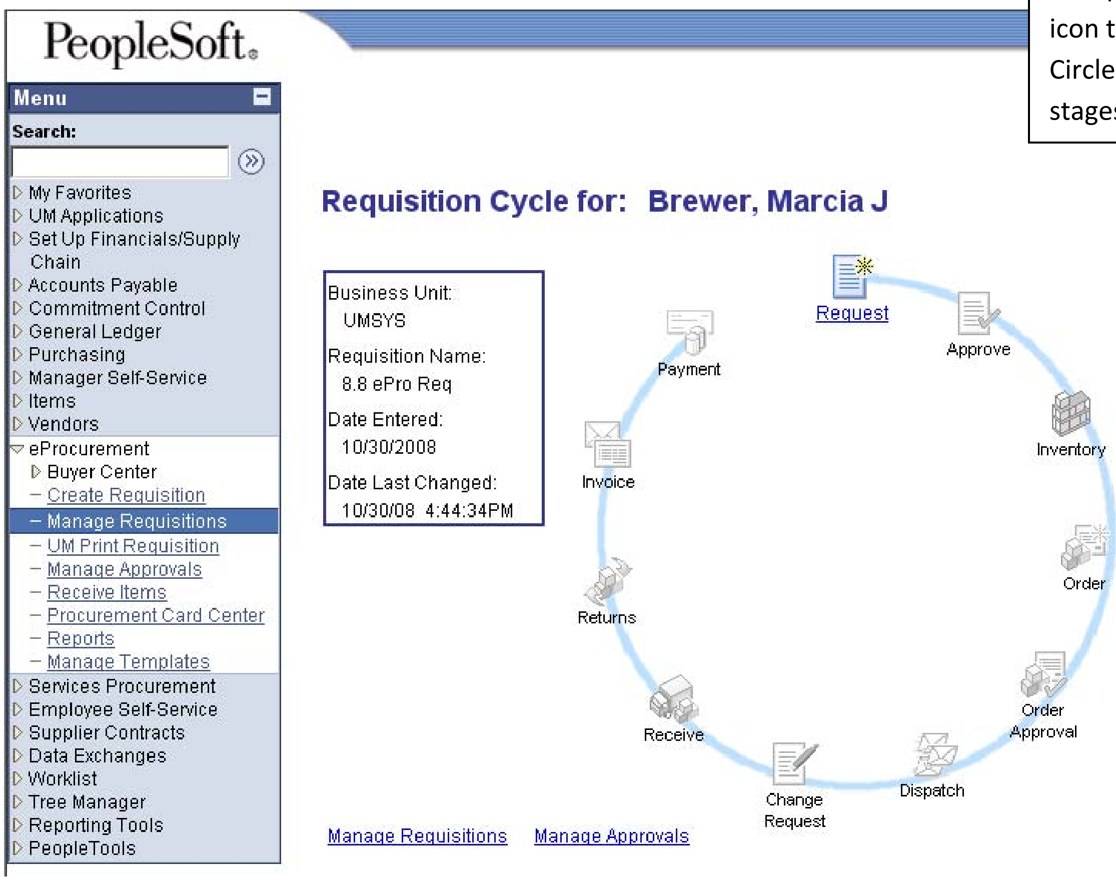

A requisition row in 8.8 Manage Requisitions included an icon to access the Requisition Cycle also known as the Circle of Life, which provided information on the various stages of the request as it moved through the system.

9.0

In 9.0 Manage Requisitions, the various stages of the request are shown in the Request Lifespan that is accessible by clicking on the arrow on the left of a requisition ID to expand the detail. If information is available for a particular stage, the image name is an active hyperlink.