

How to Save and Use Favorites in Requisitions

Also, see Job Aid, **How to Save and Use a Template in Requisitions**, for the steps to save an entire requisition to your Templates folder and use it to create a new requisition.



This job aid describes how to save and use a Favorite in requisitions. The end user must first create a requisition with line items and then navigate to the Review and Submit tab. Please see the eProcurement for End Users guide for instructions on how to create a requisition.

Note: Save the Favorite before you Click the Save and Submit button.

Favorites allow the creator to save one or more lines on a requisition to a special folder, which they may then use again to create new requisitions.

When a Favorite is used to create a new requisition, each Favorite line carries forward the following information:

- The vendor that was originally assigned to the Favorite.
- The category and the account code

A Favorite does not carry the following information forward into a new requisition:

- The budget that was charged
- Any information from the [UMass Req Info](#) page
- Line Comments
- The Requisition Name

This information must be added to the new requisition at the time it is data entered.



Do not use Marketplace requisitions to create templates or favorites. They do not lend themselves well to the hard coded pricing and descriptions that are inherent with Marketplace purchases.

Step 1. Log into the e*mpac Application with your Username and Password.

CREATE A FAVORITE

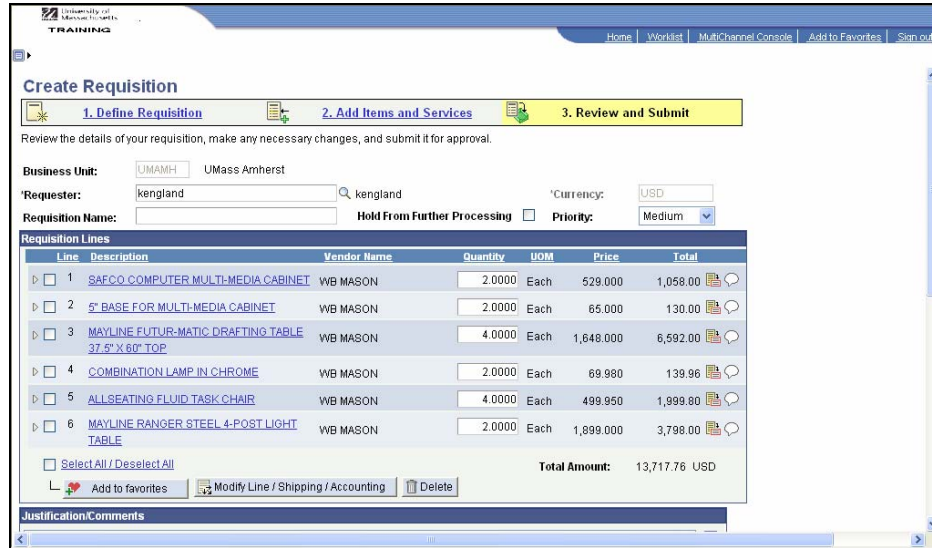


Navigate to the following path:

eProcurement → Create Requisition → Define Requisition

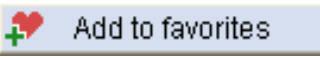
Step 2. Complete the **Define Requisition**, **UMass Req Info**, and **Special Items** pages as you would normally do. Make sure that you have completed all the steps, and that your requisition is ready to be saved. When you get to the **Review and Submit page**, proceed as follows:

The **Create Requisition (Review and Submit)** page:



Step 3. **Select** the line(s) you wish to add to your Favorites by clicking in the checkboxes next to the desired lines.



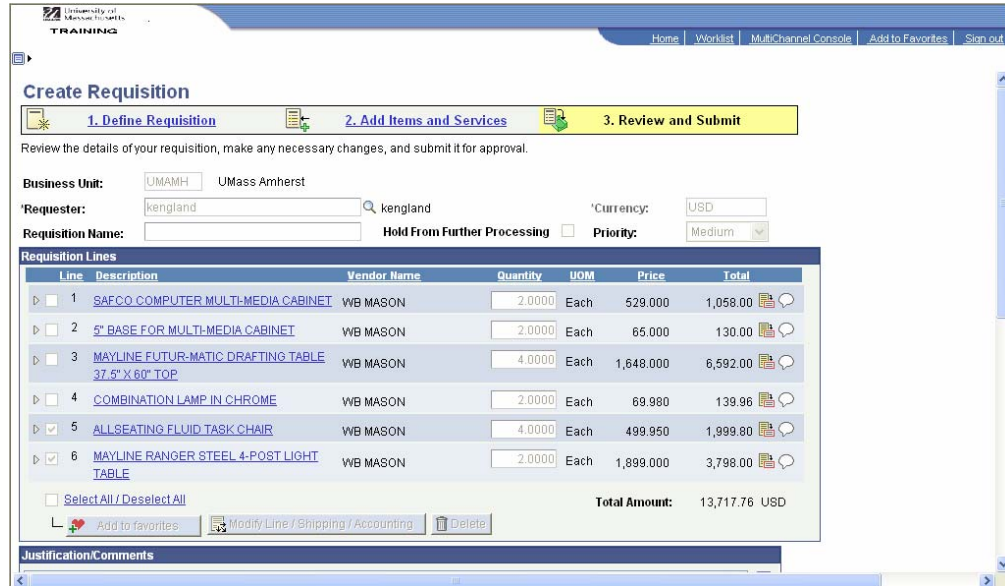
Step 4. Click the  button.

A **Confirmation** box opens in a new window.



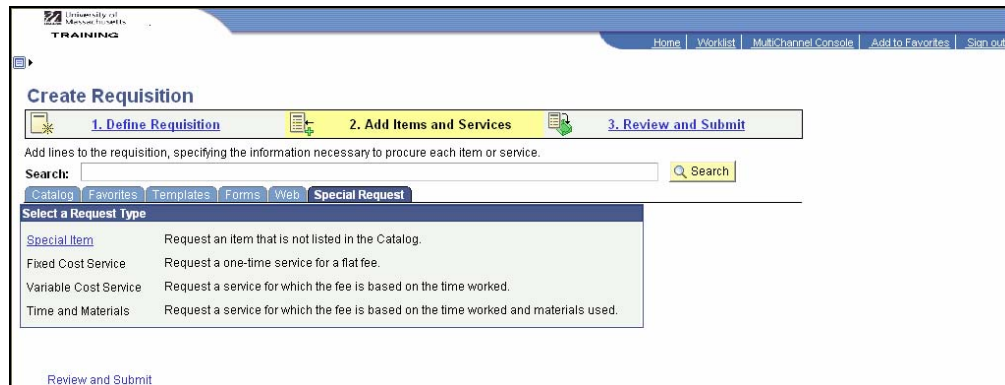
Step 5. Click the **Close** button.

Return to the **Create Requisition (Review and Submit)** page.



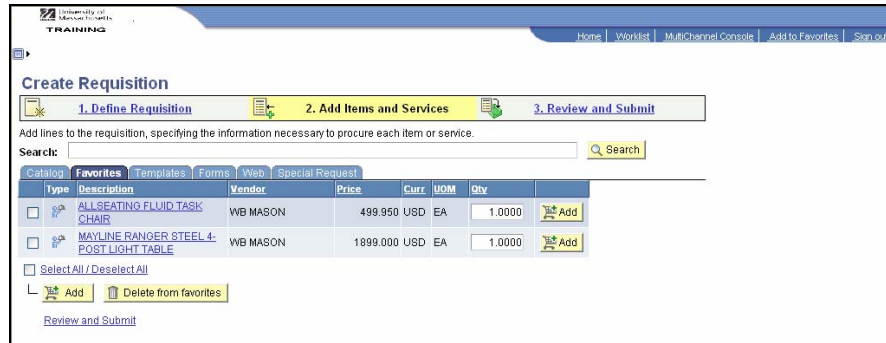
Step 6. Click the **Add Items and Services** page link.

The **Create Requisition (Add Items and Services)** page opens.



Step 7. Click on the **Favorites** tab.

The **Create Requisition – Add Items and Services (Favorites)** page opens.



Type	Description	Vendor	Price	Curr	UOM	Qty	
<input type="checkbox"/>	ALL SEATING FLUID TASK CHAIR	WB MASON	499.950	USD	EA	1.0000	Add
<input type="checkbox"/>	MAYLINE RANGER STEEL 4-POST LIGHT TABLE	WB MASON	1899.000	USD	EA	1.0000	Add



Note: The line item(s) selected as favorites are now in your **Favorites** page for future use. Return to the **Review and Submit** tab. Save and Submit and Budget Check the requisition.

How to Use Favorites

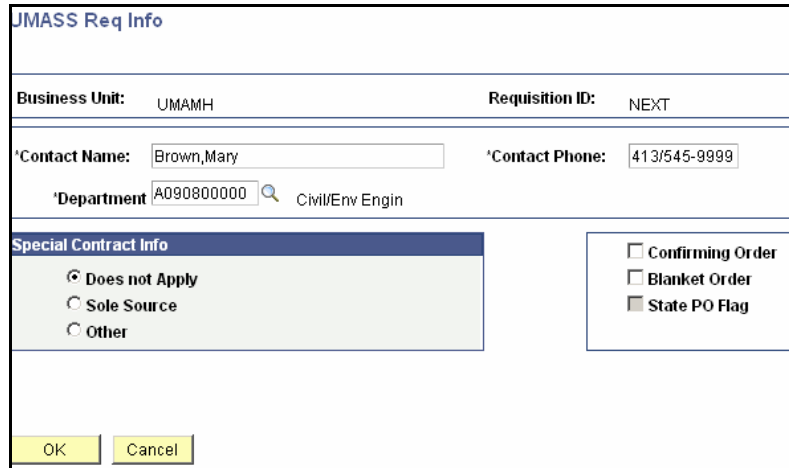
Enter a New eProcurement Requisition:

Navigation:

eProcurement → *Create Requisition*

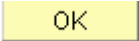
Step 8. Define Requisition page:

Complete the [UMass Req Info](#) sub-page on the **Define Requisition** tab

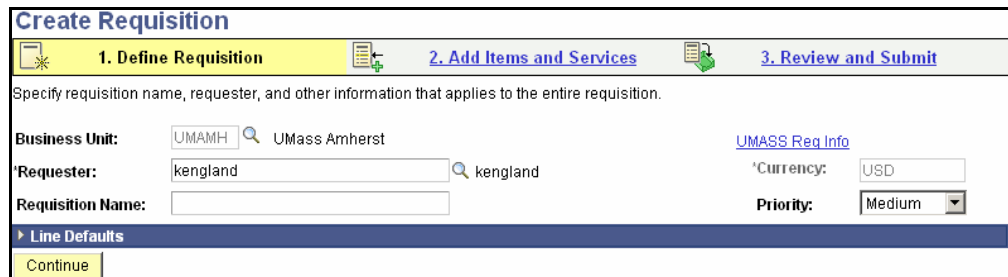


The screenshot shows the 'UMASS Req Info' sub-page. It contains the following fields and options:

- Business Unit:** UAMAMH
- Requisition ID:** NEXT
- 'Contact Name:** Brown, Mary
- 'Contact Phone:** 413/545-9999
- 'Department:** A090800000 (with a search icon) Civil/Envr Engin
- Special Contract Info:** Radio buttons for 'Does not Apply' (selected), 'Sole Source', and 'Other'.
- Order Type Options:** Checkboxes for 'Confirming Order', 'Blanket Order', and 'State PO Flag'.
- Buttons:** 'OK' and 'Cancel' at the bottom.

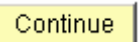
Step 9. Click the  button.

Do not enter any additional information on the **Define Requisition** page:



The screenshot shows the 'Create Requisition' page with the following details:

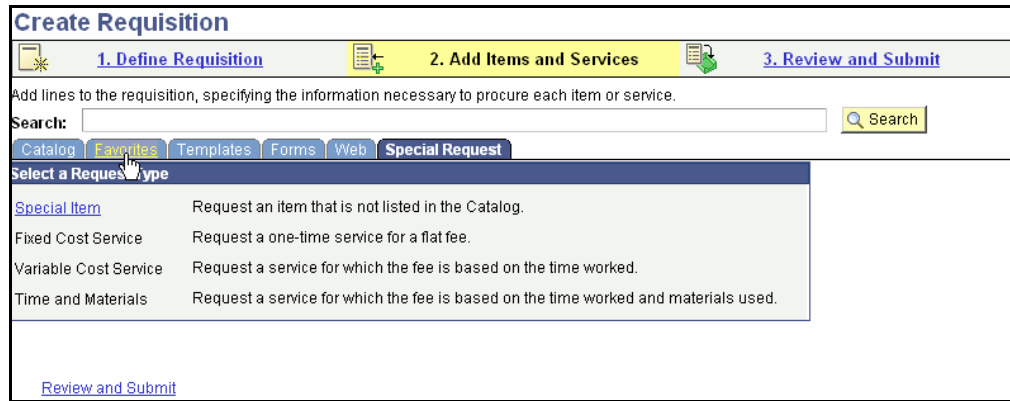
- Navigation:** Three tabs: '1. Define Requisition' (active), '2. Add Items and Services', and '3. Review and Submit'.
- Instructions:** 'Specify requisition name, requester, and other information that applies to the entire requisition.'
- Business Unit:** UAMAMH (with a search icon) UMass Amherst
- 'Requester:** kengland (with a search icon) kengland
- 'Currency:** USD
- Requisition Name:** (empty field)
- Priority:** Medium (dropdown menu)
- Line Defaults:** A blue bar with a 'Continue' button.

Step 10. Click the  button

Step 11. User is taken to the **Add Items and Services** page.

Add Items and Services page:

Click the **Favorites** tab:



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | **Favorites** | Templates | Forms | Web | Special Request

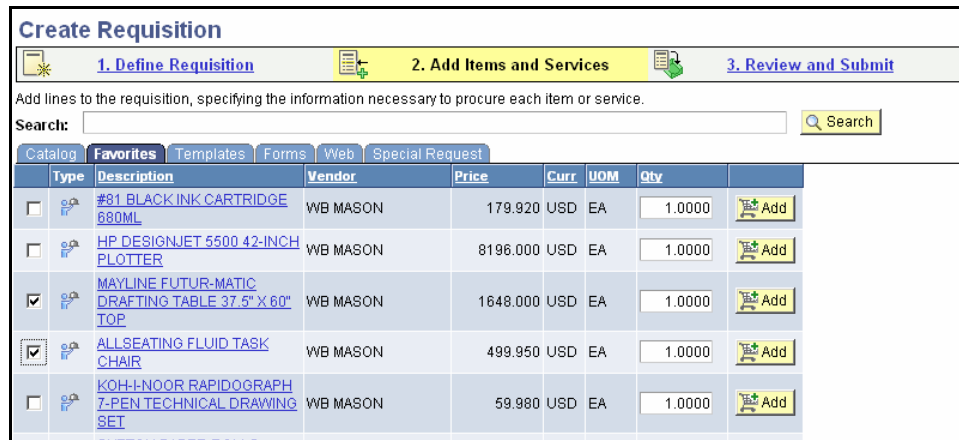
Select a Request type

- [Special Item](#) Request an item that is not listed in the Catalog.
- [Fixed Cost Service](#) Request a one-time service for a flat fee.
- [Variable Cost Service](#) Request a service for which the fee is based on the time worked.
- [Time and Materials](#) Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

Step 12. The **Favorites** page opens. All the Favorites for the Operator are displayed.

Select the items that you want to purchase by **clicking** in the **checkbox** next to the desired line. Update the quantities, if necessary:



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | **Favorites** | Templates | Forms | Web | Special Request

Type	Description	Vendor	Price	Curr	UOM	Qty	
<input type="checkbox"/>	#81 BLACK INK CARTRIDGE 680ML	WB MASON	179.920	USD	EA	1.0000	<input type="button" value="Add"/>
<input type="checkbox"/>	HP DESIGNJET 5500 42-INCH PLOTTER	WB MASON	8196.000	USD	EA	1.0000	<input type="button" value="Add"/>
<input checked="" type="checkbox"/>	MAYLINE FUTUR-MATIC DRAFTING TABLE 37.5" X 60" TOP	WB MASON	1648.000	USD	EA	1.0000	<input type="button" value="Add"/>
<input checked="" type="checkbox"/>	ALLSEATING FLUID TASK CHAIR	WB MASON	499.950	USD	EA	1.0000	<input type="button" value="Add"/>
<input type="checkbox"/>	KOH-I-NOOR RAPIDOGRAH 7-PEN TECHNICAL DRAWING SET	WB MASON	59.980	USD	EA	1.0000	<input type="button" value="Add"/>

Step 13. **Scroll** down to the bottom of the **Favorites** page and **Click** the button to add selected lines.

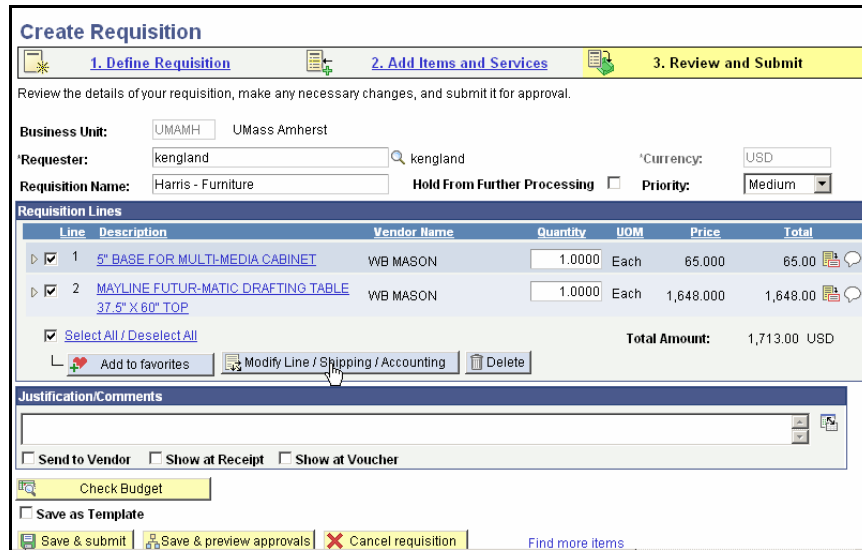
Step 14. Click the [Review and Submit](#) link under the **Add** button.

Step 15. The **Review and Submit** page opens:

Complete the **Requisition Name** field, if desired. Make any additional edits deemed necessary to the line(s) (unit price, description, quantity).

Select All Lines (if all lines are to be charged to the same budget).

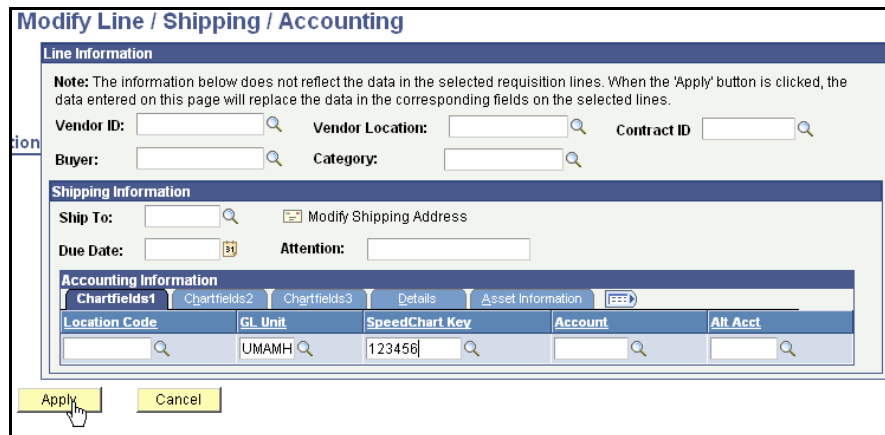
Click the  button

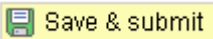


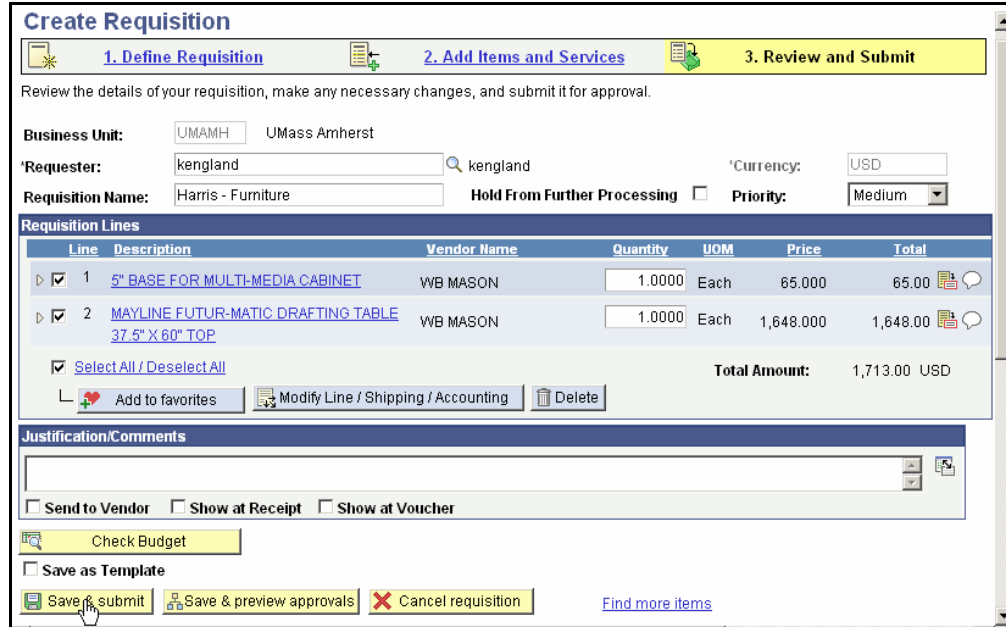

If more than one budget needs to be charged to a single line, the split must be done at the line level, **not** through Modify Lines/Shipping/Accounting.

Step 16. **Insert** the SpeedChart number for the budget to be charged in the **SpeedChart Key** field:

Click the  button to apply the budget to the selected lines.



Step 17. Click the  button to save the requisition and submit it to workflow.



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UMAMH UMass Amherst

***Requester:** kengland kengland ***Currency:** USD

Requisition Name: Harris - Furniture **Hold From Further Processing** **Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	5" BASE FOR MULTI-MEDIA CABINET	WB MASON	1.0000	Each	65.000	65.00
2	MAYLINE FUTUR-MATIC DRAFTING TABLE 37.5" X 60" TOP	WB MASON	1.0000	Each	1,648.000	1,648.00
Total Amount:						1,713.00 USD

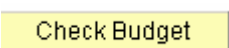
Justification/Comments

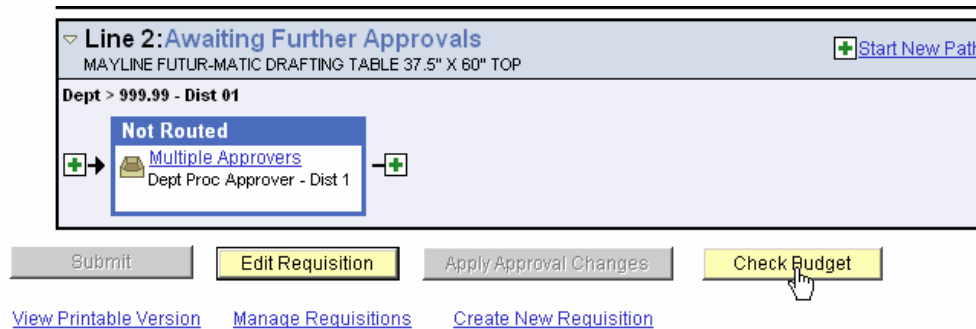
Send to Vendor Show at Receipt Show at Voucher

Check Budget

Save as Template

[Find more items](#)

Step 18. Click the  button. The system will display **Processing** until the budget checking process is complete. Check the budget status at the top of the page to make sure that the status shows **Valid**.



Line 2: Awaiting Further Approvals [Start New Path](#)

MAYLINE FUTUR-MATIC DRAFTING TABLE 37.5" X 60" TOP

Dept > 999.99 - Dist 01

Not Routed

[Multiple Approvers](#)
 Dept Proc Approver - Dist 1

[View Printable Version](#) [Manage Requisitions](#) [Create New Requisition](#)

End Job Aid