The University maintains several Inventory Business Units (also known as Stores or Warehouses) throughout campus that offer commonly used supplies. Over 70,000 items are available for campus and hospital to choose from. These products can be purchased through Catalog Orders that are accessed via PReqs and may be sourced from multiple Inventory Store (or Warehouse) units per order. Catalog Orders also allow purchase of Non-Inventory supplies that can be sourced from multiple vendors. Both types of orders leverage the University’s buying power to assure the lowest prices and quick delivery of the material required for our daily operations. One order may contain items from multiple warehouse and/or multiple vendor items.

Requesters will need to complete a PReqs access form before access to the specific catalogs can be granted. Access to catalogs is based upon your position, department and job responsibilities.

This guide demonstrates the steps to order goods using PeopleSoft Catalog Orders through the PReqs System. UI Store Units that currently offer a Catalog online include: General Stores, Hospital Process Stores, Dentistry Stores and College of Pharmacy. These goods are assigned a PeopleSoft Item Number and have been contracted through UI Purchasing. PS Catalog Orders save time and provide a simple method to order items for a department. They provide the end-user the flexibility to buy items in a central location using one method, while the system auto generates the Order to each UI Store Unit and/or to each Vendor. Also, these Orders do not require additional Purchasing Workflow for approval because the items have already been contracted. So once the Shopping Cart Order or Requisition has been approved through Departmental Workflow, the order is sent directly to the UI Store or Vendor.

Contents

Accessing System ....................................................................................................................................................................................... 1
PReqs Home ............................................................................................................................................................................................ 2
Catalog Order Section ........................................................................................................................................................................ 2
Requisition Section ............................................................................................................................................................................... 2
Favorites .......................................................................................................................................................................................... 4
Create New Order .................................................................................................................................................................................... 5
Order By Page ....................................................................................................................................................................................... 5
Shop for Items ........................................................................................................................................................................................ 6
Shopping Cart ~ Ordering Items Sourced to a Warehouse ..................................................................................................................... 7
Recurring Orders ................................................................................................................................................................................ 8
Shopping Cart ~ Ordering Items Sourced to a Warehouse and Sourced to Vendor ........................................................................ 9
Finalizing Order ~ Items Sourced to Warehouse and Vendor ........................................................................................................ 10
Shopping Cart ~ Catalog Order (Shopping Cart Favorites) ............................................................................................................. 11
Order to Vendor ~ Workflow Required ........................................................................................................................................ 12
Attachments .................................................................................................................................................................................... 13
Finalizing Workflow .......................................................................................................................................................................... 14
PReq Sidebar ................................................................................................................................................................................... 15
Search Center .................................................................................................................................................................................. 16
Catalog Order Guidelines .................................................................................................................................................................. 17
Recurring Orders .................................................................................................................................................................................. 18
Finalizing Order ~ Items Sourced to Warehouse and Vendor ........................................................................................................ 19
Attachments .................................................................................................................................................................................... 20
Finalizing Workflow .......................................................................................................................................................................... 21
Below is a diagram that outlines the steps from beginning to end on processing PS Catalog Orders.

**Accessing System**
To access Catalog Orders/Purchase Requisitions (PREQs), go to https://hris.uiowa.edu/portal/.

**Note:** Your web browser must support encryption and have cookies enabled in order to login. We recommend using Internet Explorer to take advantage of the many features within Purchase Requisitions.
You should now be at PReqs Home page. You can view Requisitions, Purchase Orders, Catalog Orders and eBuy Orders by clicking on the Browse next to the appropriate list.

The PReqs Home Page is where the Initiators can browse and check the status of the requisitions, purchase orders, and catalog orders they created. You will not be able to see orders created by other Initiators on this page. This page shows only your own work. This is where Initiators will keep track of their Warehouse orders to see when they complete and Vendor orders to see when a purchase order number is assigned.

**Catalog Order Section**

**Browse Draft** – Order where the submit button has not been pressed.

**Browse In Progress** – Order that has at least one stock item that has not been sourced in PeopleSoft

**Browse Complete** – Order that has been submitted with only non-stock items, or has stock items that have all been sourced or cancelled

**Browse Cancelled within the last 30 days** – Order with at least one stock item that has been cancelled

**Browse All my Stock Orders** – Shows all stock orders

*Supply Items sourced from a Warehouse will only list under the Catalog Order section

*Supply Items sourced from a Vendor will list under Catalog Order section until a user has clicked submit, then will list under Requisition and Purchase Order section.

**Requisition Section**

**Browse Requisitions in Workflow** will display a list of requisitions that have the status of Inside Workflow or Sent to Workflow.

Inside Workflow means that the requisition is actually inside the Workflow system and is waiting for one or more approvals. Sent to Workflow means that the requisition has been finalized and sent to Workflow, but has not actually entered the Workflow process.

**Browse Draft Requisitions** will display a list requisitions that have been saved as a draft copy, but have not yet been completed, validated, and sent to Workflow.

**Browse Today’s Requisitions** will display a list of requisitions that the Initiator created on the current day.

**Created During the Past 5, 30, and 60 days** and **All of My Requisitions** will list requisitions based on the specific list title.

After you click on any one of these Browse lists, the system takes you to the Requisition Center.

### PReq Status Section

The definitions for the requisition statuses are:

**Inside Workflow** - Requisition inside Workflow waiting for one or more approvals

**Sent to Workflow** - Requisition that has been validated and sent to Workflow, but has not yet entered the Workflow process

**Draft** - Requisition saved as a draft copy that has not yet been validated or Sent to Workflow.

**Workflow Void** - Requisition voided in Workflow

**Deleted** - Requisition deleted by the Initiator before the Approvers received it in Workflow. There should be an
internal comment entered on the Requisition explaining why it was deleted.

**Workflow Complete** - All approvers have approved the requisition and the Purchase Order number has been assigned. See the Purchase Order Center for the PO number. After the PO number has been assigned the requisition will upload to PeopleSoft.

To view a requisition in the list, click on the Requisition #. And the PReq form will be displayed.

Click on Back to return to My Home Page.

**PReqs Home**

- **Requisitions**
  - Browse 18 requisitions in workflow.
  - Browse 1 draft requisitions.
  - Browse 0 today’s requisitions.
  - Browse 0 created during the past 5 days.
  - Browse 1 created during the past 30 days.
  - Browse 9 created during the past 60 days.
  - Browse 19 all of my requisitions.
  - Search my requisitions.

- **Purchase Orders**
  - Browse 0 today’s purchase orders.
  - Browse 0 created during the past 5 days.
  - Browse 0 created during the past 30 days.
  - Browse 35 created during the past 60 days.
  - Browse 162 all of my purchase orders.

**Purchase Order Center**

<table>
<thead>
<tr>
<th>Req #</th>
<th>End User</th>
<th>PO ID</th>
<th>PO Date</th>
<th>PO Type</th>
<th>PO Status</th>
<th>Vendor Name</th>
<th>Req Amt</th>
<th>Description</th>
<th>Attach</th>
</tr>
</thead>
<tbody>
<tr>
<td>W000116322</td>
<td>Julie Bergeon</td>
<td>1000603990</td>
<td>2007-08-23</td>
<td>RFQ Order</td>
<td>Approved</td>
<td>Thomson Healthcare</td>
<td>$ 7,287.00</td>
<td>Three Year Sub/Subscription</td>
<td>Y</td>
</tr>
<tr>
<td>W000116330</td>
<td>Gwen Jarosh</td>
<td>1000604090</td>
<td>2007-08-27</td>
<td>Quote</td>
<td>Approved</td>
<td>Systems Incorporated</td>
<td>$ 5,000.00</td>
<td>Installation of items purchase</td>
<td>Y</td>
</tr>
<tr>
<td>W000116340</td>
<td>David Bergeon</td>
<td>1000609981</td>
<td>2007-08-23</td>
<td>Regular</td>
<td>Dispatched</td>
<td>Stoll Pilates</td>
<td>$ 2,317.50</td>
<td>ST 01019 USReformer-Group SPX</td>
<td>Y</td>
</tr>
</tbody>
</table>

**Purchase Order Status Section**

The definitions for the Purchase Order statuses are:

- **Open**: The PO has been uploaded to PeopleSoft, but has not been finalized by Purchasing or dispatched to the vendor. Funds are not yet encumbered.
- **Approved**: The PO has been verified and finalized by Purchasing. The order will be dispatched to the vendor on the next working day after it is approved.
- **Dispatched**: The PO has been sent to the vendor via fax or mail. Funds are encumbered. It can now be vouchered.
- **Complete**: The PO has been fully vouchered and has gone through PO Recon. Once an order is complete it cannot be reactivated. Funds are no longer encumbered.
- **Cancelled**: The PO has not been vouchered and has been cancelled by Purchasing. Funds are no longer encumbered.

Initiators can click on the PO ID to view the PO report on-line on the AP-PO Web Application. If the PO status is blank, the PO report is not yet available. The PO report will be available as soon as the order has uploaded to the PeopleSoft System. This is the Business Financial System Software currently being used by Purchasing and Accounts Payable. Departments need to view the PO Report for accuracy. Contact the Buyer at once regarding any discrepancies.
Favorites

Favorites is for saving frequently used information and can be added throughout the PReq by clicking add.

You may also have the option to add this information manually.

Under Favorites on the side bar, click on the MFK to get to this screen.

The Bookmark Name is a title you assign to the Favorite to identify and remember it by. It can be anything you want.

Fill in the MFK fields and click Add to add another.

Always remember to save after adding any new entries.

Leave IACT and OACT blank for catalog orders. These values will default from the item.

When you click End User under Favorites you may enter your Bookmark Name and tab to the Name field, enter the name and tab to the Phone field and enter the phone number, including area code and click Save.

Wherever you see the a window displays a list of your favorites.

Here are examples of the other Favorites screen. Create your own Favorites for all the fields listed.

Vendor Favorites

<table>
<thead>
<tr>
<th>#</th>
<th>Act</th>
<th>BookmarkName</th>
<th>Address</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>X</td>
<td>Sourcecorp BPS Incorporated</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>X</td>
<td>AAA Mechanical Contractors Inc</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

EndUser Favorites

<table>
<thead>
<tr>
<th>#</th>
<th>Act</th>
<th>BookmarkName</th>
<th>name</th>
<th>phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>X</td>
<td>Berger, Julie</td>
<td></td>
<td>319-335-1726</td>
</tr>
</tbody>
</table>

Category Favorites

<table>
<thead>
<tr>
<th>#</th>
<th>Act</th>
<th>BookmarkName</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>X</td>
<td>Business use papers Paper Che</td>
<td>14111801</td>
</tr>
<tr>
<td>2</td>
<td>X</td>
<td>Formulas and products for nurs</td>
<td>42251001</td>
</tr>
</tbody>
</table>

Receiver Favorites

<table>
<thead>
<tr>
<th>#</th>
<th>Act</th>
<th>BookmarkName</th>
<th>Mask ID</th>
<th>Decline</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>X</td>
<td>heefer</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Create New Order

Click on the Create Req link on the side bar and you’ll get the Order By page below.

Note: If Create Req is grayed out, a Requester must fill out a PReq Access form to get the initiator signed up. See PReqs Access link on side-bar.

Order By Page
Select PeopleSoft Catalog Orders. All fields on the Order By page are required.

Order By
Select one of the following to order by:
- Purchase Request: This requisition will be used to order by contract or by description for services, equipment, repairs and blanket orders that go to an outside vendor.
- eBuy Shopping: This section will direct you to prime vendor contracts.
- PeopleSoft Catalog Orders: This selection will be used to order PeopleSoft item number products that are sourced from Hospital Process Stores, General Stores, Dentistry Stores, and College of Pharmacy Stores or from a vendor.  See Shopping Cart Favorites / Requesting Orders.

Requester Information

Requester: [Name]
HawkID: [HawkID]
Location: [Location]
Phone: [Phone]
Dept: [Department]
Email: [Email]

Ship To: [Ship To]
Address: [Address]
Fax: [Fax]

End User: [End User]
Phone: [End User Phone]

Continue

The Requester(s) you have been approved to use will be listed in the drop-down menu next to Requester:

Click down arrow next to the Requester: field and click on the Requester name that you want to use and it will populate the Requester information and corresponding Ship To information on the main screen.

Requester:
HawkID: [HawkID]
Location: [Location]

End User: The End User is the member of your department requesting the good or services. Make sure to enter the phone number in the format shown, including area code.

Remember: These can be added to your Favorites by clicking the add link.

End User: [End User]
Phone: [End User Phone]

Requester: This information is used to identify the person in the department who works directly with Purchasing and Accounts Payable to facilitate the procurement and payment process. Requesters may be contacted by Purchasing, Accounts Payable, or the vendor if a question arises regarding the Order.

Ship To Code: The Ship To Code fills in automatically according to the Requester you’ve selected. This code identifies the location to which the merchandise being ordered is to be sent.

Catalog Order Guide
Sourced to Stores & Vendor
University of Iowa Purchasing Department
www.uiowa.edu/ap-purchasing
This MFK will default in on the Catalog Orders and can be changed if needed.

**Default MFK**

050 05 0311 00000 506-49100 6026 000 00000 60 0000

---

### Catalog Access

**Catalog Access:** Requesters/Initiators must be assigned specific catalogs in order to be able to access the catalog and order the item in the catalog. This is a list of the catalogs you have access to.

<table>
<thead>
<tr>
<th>SetID</th>
<th>Catalog</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UIOWA</td>
<td>UH_ASC</td>
<td>Ambulatory Surg Center</td>
</tr>
<tr>
<td>UIOWA</td>
<td>UH_CATH_LAB</td>
<td>Cath Lab</td>
</tr>
<tr>
<td>UIOWA</td>
<td>UH_CSS</td>
<td>Central Sterilization Serv</td>
</tr>
<tr>
<td>UIOWA</td>
<td>UH_MOR</td>
<td>Main Operating Room</td>
</tr>
<tr>
<td>UIOWA</td>
<td>UH_PROCESSED_STORE</td>
<td>Processed Stores Hospital</td>
</tr>
</tbody>
</table>

Click the **Continue** button to continue to the Item Search Page.

---

### Shop for Items

- **OrderBy Page**
- **Go to Shopping Cart**
- **QuickShop**
- **Add to Cart**
- **Start Search**
- **Clear**
- **Expand All UCM**
- **Expand All Mfg Info**
- **Expand All Vendors**

*Match any criteria* 

- **UI Item #**
- **Vendor Item ID**
- **Description**
- **Manuf Item ID**
- **Vendor Item ID**
- **Catalog**
- **Alias**

*Filter search by:* 

- **Search**
- **Clear**
- **Go to Shopping Cart**
- **Add to Shopping Cart**

---

- Nothing found to display
- **Collapse All**
- **Expand All UCM**
- **Expand All Mfg Info**
- **Expand All Vendors**

---

**Order Qty**

- **Go to Shopping Cart**
- **Add to Shopping Cart**

---

On the item search page, you may search for items using many different criteria. You can narrow search by putting information in multiple fields and using any or all match criteria in the drop-down. The default (Match any criteria) will result in items with at least one of the criteria typed. Selecting all will result in items with all criteria typed.

You must select one field to search on. The search will find entries where your search is part of a word and will ignore capitalization.

---

The first field is a global search which searches the description, manufacture name, manufacture item id, and vendor item id.

If the user knows the UI Item id, then you may type this in the **QuickShop** field and click **Add to Cart**, it will then be placed in your shopping cart. Click **Go to Shopping Cart** if you want view its contents.
In this example the search criteria is **Description**-syringe and **Catalog**-Processed Stores Hospital.

Type the desired **Order Qty** and click **Add to Shopping Cart**.
Comments: If the Items are sourced to the Warehouse you can enter Comments that will be sent to the UI Store Unit and printed on their Picklist by clicking on the ☰. Once complete, click the Return to Order and the ☰ will update to indicate comments are added.

Business Justification: This is required for each order; please describe the justification for the purchase. Provide enough information to those that are approving the transaction, so everyone understands what they are approving.

Items Sourcing from a Warehouse: This will split out items based on which Warehouse that the items are being sourced from. You have the ability to update the Quantity, Remove the Item or update the MFK. (Items sourcing from the Vendor, see Requisition, Step 4 below)

Complete Warehouse Order: Once all Line Items have been reviewed, you have four options to Complete the Shopping Cart. Click Save, to save the Order as is and finish at a later time. Click Validate to check errors on the Order, any errors will be outlined in red and must be corrected before you can Submit the Order.

Click Submit to finalize order. After clicking Save, Validate or Submit, a 10-digit Shopping Cart ID is assigned to the Order (SC000XXXXX) and once the Order has been processed a Stock Request ID is assigned, (0000XXXXXX). Both the Requester and Initiator will get an email, including the Stock Request ID and Shopping Cart ID assigned to the Order. They are also notified if the Order is able to be filled, partially filled or canceled (item will need to be re-ordered) by the Warehouse. The last option if the Order is no longer needed, the end user has the ability to Cancel the Order prior to submitting by clicking the Cancel button. This Completes the Order.

Save Cart Favorite

Save as Recurring: Allow users to set up orders which you place on a daily, weekly, monthly, or yearly basis.

Status are:
- In Progress-Item has not been sourced from warehouse
- Complete-Item has been sourced and will be shipped
- Cancelled-Item order cannot be filled and will require a new order to be submitted

Catalog Order Guide
Sourced to Stores & Vendor

University of Iowa Purchasing Department www.uiowa.edu/ap-purchasing
Recurring Orders
The system will generate your daily, weekly, monthly, or yearly orders and email you when it is ready to be submitted. The order will not be sent to the Vendor or UI Stores until you review and click Submit. Recurrences set up to begin on the present date will be created within an hour. Orders set up for a future date will be created at 12M on that day.

Once you have items in your shopping cart, you have the option of saving it as a recurring order. Click Save as Recurring. The system will verify if you want to initiate this. Click OK.

Reurrence Information
- A recurring order is a way to automatically order items on a recurring basis so you don’t have to keep re-ordering the same items daily, weekly or monthly. Enter the Recurrence name, frequency and beginning and end dates.
- Next order date is checked every hour. Most recurring orders will get created shortly after midnight, on the “next order date”. When a new order is created, an email notification will go to the Initiator with a link to the order where they will need to review and submit for processing.

Once you have items in your shopping cart, you have the option of saving it as a recurring order. Click Save as Recurring. The system will verify if you want to initiate this. Click OK.

The Recurrence is not active until you enter an Order Reference name, frequency, and beginning/end date.

Save will save the Recurrence and make it Active.
When you receive an email that the order was created, you will still need to validate the order (MFK) and Submit.

Validate will validate and save the Recurrence and make it Active. Once you receive an email that the order was created, simply click the SC# and submit the order.

Cancel will cancel the recurrence if you decide a recurrence isn’t needed.

If you don’t wish to wait for the next order date, you may click the link to create it immediately.

At any time you wish to discontinue the Recurring Orders, simply click the Delete link.
After the last recurrence (End Date), the order will be come inactive. Click the RC# to modify it.

View Orders generated from this recurrence. Recurrence is inactive.

When you receive an email that the order was created, you will still need to validate the order (MFK) and Submit.

Validate will validate and save the Recurrence and make it Active. Once you receive an email that the order was created, simply click the SC# and submit the order.

Cancel will cancel the recurrence if you decide a recurrence isn’t needed.

If you don’t wish to wait for the next order date, you may click the link to create it immediately.

This Recurring Order is now active and will display in your Recurring Order Center from your Home Page.

Recurring Order Center

<table>
<thead>
<tr>
<th>Order #</th>
<th>Next Order Date</th>
<th>Frequency</th>
<th>Order Ref</th>
<th>Status</th>
<th>Total</th>
<th>End Date</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>RCO212131</td>
<td>2009-04-03</td>
<td>Monthly</td>
<td>GS Monthly</td>
<td>Inactive</td>
<td>$ 46.36</td>
<td>2012-01-20</td>
<td>Delete</td>
</tr>
<tr>
<td>RCO212132</td>
<td>2012-01-20</td>
<td>Daily</td>
<td>Daily Store Daily</td>
<td>Inactive</td>
<td>$ 98.04</td>
<td>2012-01-20</td>
<td>Delete</td>
</tr>
<tr>
<td>RCO212134</td>
<td>2012-03-27</td>
<td>Weekly</td>
<td>GS Monthly Weekly Order</td>
<td>Active</td>
<td></td>
<td>2012-04-30</td>
<td>Delete</td>
</tr>
</tbody>
</table>

Enter a new Next Order and End Date

If you wish to create a bi-weekly recurring order, add the items to your cart and create the recurring order. Set up the first recurring order for Weekly, every Monday. Click Copy Order under PReqs on the Sidebar, then set the second order up for Weekly, every Wednesday.
Shopping Cart ~ Ordering Items Sourced to a Warehouse and Sourced to Vendor

Orders can be combined with items sourced to Warehouse and items sourced to Vendor with or without workflow being required.

Add your search criteria and click **Search**.

This example was displayed by searching for “non-sterile” in the description field.

Notice the **Sourcing from** column; these items are from **Warehouse** and an outside **Vendor**.

Note the number following the Vendor in the **Sourcing from** column shows the vendor priority. “1” being the most favored vendor.

<table>
<thead>
<tr>
<th>DC Item #</th>
<th>Vendor Code</th>
<th>Description</th>
<th>UOM Price</th>
<th>UOM</th>
<th>Manufacturer</th>
<th>Vendor Name</th>
<th>Order Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>92231-65</td>
<td>90900</td>
<td>Applicators Wood Plain Non-sterile 6 inch</td>
<td>$4.5007</td>
<td>EA</td>
<td>SOWW MANUFACTURING COMPANY</td>
<td>90900</td>
<td>WPS05</td>
</tr>
<tr>
<td>922319</td>
<td>6011200</td>
<td>Tongue Blade Non-sterile Junior</td>
<td>$19.0000</td>
<td>BX</td>
<td>SOWW MANUFACTURING COMPANY</td>
<td>6011200</td>
<td>WPS05</td>
</tr>
<tr>
<td>922320</td>
<td>21-000</td>
<td>Forceps Tissue Allision 4-5 Teeth Non-sterile 6 inch</td>
<td>$2.0000</td>
<td>EA</td>
<td>FINE SCIENCE TOOLS INC</td>
<td>21-000</td>
<td>-</td>
</tr>
<tr>
<td>922323</td>
<td>3105</td>
<td>Gauze Cut Non-sterile 400 Pieces Per Pack 1 x 18 inch</td>
<td>$31.9900</td>
<td>EA</td>
<td>KENDALL HEALTHCARE</td>
<td>3105</td>
<td>-</td>
</tr>
<tr>
<td>922324</td>
<td>16-200</td>
<td>Needle Holder Mayo-Prager Non-sterile 6</td>
<td>$5.0000</td>
<td>EA</td>
<td>FINE SCIENCE TOOLS INC</td>
<td>16-200</td>
<td>-</td>
</tr>
</tbody>
</table>

The + indicates that items have multiple UOM (units of measure), vendors, and manufacturer.

Click the + to open more options.

Type the desired **Order Qty** and click **Add to Shopping Cart**

After you’ve selected all the items needed on the Item Search page, click on **Go to Shopping Cart** at the top or bottom of the page.
Finalizing Order ~ Items Sourced to Warehouse and Vendor

Shopping cart displayed shows Warehouse and Vendor items. It will be necessary to add a receiver, even if it isn’t required to receive on the items.

Receiver Information

You will be required to enter a Business Justification for the order(s).

Items Sourcing From a Warehouse:

Comments for the Warehouse

UTHC MAIN PHARMACY STOREROOM

Business Justification for This Purchase:

Warehouse Subtotal: $456.28

Items Sourcing From a Vendor:

Header Comments that will default to all lines

Order Total: $588.88

Save as Favorite: For frequently ordered items. You can save the order which will prompt you to name the cart.

Submit: Submits to PeopleSoft the stock items (items sourced from a warehouse) will become stock requests and the non-stock (items sourced from vendor) will become requisitions and then purchase orders.
It will also create Req IDs for the order for items sourced to Vendor, which may or may not require further action from you depending on your workflow threshold. The requester, initiator, and purchasing agent will receive an email indicating the PO #.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Qty</th>
<th>UOM</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>9224183</td>
<td>1.0</td>
<td>EA</td>
<td>$319.99</td>
</tr>
<tr>
<td></td>
<td>Gauze Cut Non-sterile 400 Pieces Per Pack 13 x 16 Inch</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>9224183</td>
<td>5.0</td>
<td>PK</td>
<td>$150.00</td>
</tr>
<tr>
<td></td>
<td>Gauze Cut Non-sterile 400 Pieces Per Pack 13 x 16 Inch</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Supplier Subtotal:** $479.99

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Qty</th>
<th>UOM</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>922406</td>
<td>5.0</td>
<td>EA</td>
<td>$14.10</td>
</tr>
<tr>
<td></td>
<td>Forceps Tissue Allison 4-5 Teeth Non-sterile 5in</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Supplier Subtotal:** $14.10

**Order Total:** $519.13
Shopping Cart ~ Catalog Order (Shopping Cart Favorites)

Click on the Create Req link in the side bar area and you’ll get the Order By screen below.

For orders you’ve previously saved as a favorite, you’ll begin the same way on the Order By page. Verify the Requester, Ship to, and End User Information. Click the link Shopping Cart Favorites.

A list of your Saved Shopping Lists will display.

You may select the cart name or remove from your list.

### Saved Shopping Lists

<table>
<thead>
<tr>
<th>Order ID</th>
<th>Cart Name</th>
<th>remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCC0212333</td>
<td>Lab Coats Weekly</td>
<td></td>
</tr>
<tr>
<td>SCC0212377</td>
<td>AGA Medical order</td>
<td></td>
</tr>
<tr>
<td>SCC0212665</td>
<td>Scrub Order/Linen Stores</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UI Item #</th>
<th>Description</th>
<th>UOM Price</th>
<th>UOM</th>
<th>Sourcing from</th>
<th>Order Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>42541</td>
<td>Pants Charcoal Dietary 34</td>
<td>$14.4000</td>
<td>EA</td>
<td>Standard Textile Company - 1</td>
<td>6.0</td>
</tr>
<tr>
<td>42549</td>
<td>Pants Charcoal Dietary 36</td>
<td>$14.4000</td>
<td>EA</td>
<td>Standard Textile Company - 1</td>
<td>6.0</td>
</tr>
<tr>
<td>42550</td>
<td>Pants Charcoal Dietary 38</td>
<td>$13.7500</td>
<td>EA</td>
<td>Standard Textile Company - 1</td>
<td>6.0</td>
</tr>
</tbody>
</table>

Your items and quantities are saved in the Favorites. You may change the quantities, delete and/or Add to Shopping Cart.

You may even add items to an existing cart Favorite by clicking Add Items.
Items Sourcing From a Warehouse:

Your order is displayed.
You can still change a MFK, change quantity, or add the item to your favorites.

You can add comments by clicking this icon

Save, Validate, Submit, or Cancel your order.

Order to Vendor ~ Workflow Required
Click the PReq link to access requisition.

![Image](509x698)

Covidien More Info

![Image](526x713)

Surgical Advantage More Info

![Image](321x756)

Warehouse Subtotal: $124.55

Stock Subtotal: $124.55

Order to Vendor ~ Workflow Required
Click the PReq link to access requisition.

![Image](32x119)

Catalog Order Guide
Sourced to Stores & Vendor

University of Iowa Purchasing Department www.uiowa.edu/ap-purchasing
Vendor Information

Vendor ID: 115767  Addr #: 1  LOC: 5
Vendor Name: Karr Corporation
Address: 1737 W Collins Ave
City: Orange
Fax: 600-927-7345
State: CA
Phone: 9267
Zip: 92867
Country: USA
Email:

Order Details

Business Justification for This Purchase:

<table>
<thead>
<tr>
<th>#</th>
<th>Act</th>
<th>UI Item #</th>
<th>City</th>
<th>UOM</th>
<th>Category</th>
<th>Price</th>
<th>Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>X</td>
<td>15811</td>
<td>EA</td>
<td>1000</td>
<td>Add Item</td>
<td>$131.00</td>
<td>$1,310.00</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>15212</td>
<td>RH</td>
<td></td>
<td>Add Item</td>
<td>$20.79</td>
<td>$207.90</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>15320</td>
<td>JR</td>
<td></td>
<td>Add Item</td>
<td>$1131.50</td>
<td>$1131.50</td>
</tr>
</tbody>
</table>

Vendor Item ID:
Mfg Item ID:
Contract Id:

Inspection Required: [ ] Inspection Not Required: [ ]
Due Date: 01/01/2015

Vendor and line information defaults from UI Item number. You are unable to change this information.

This will be your final opportunity to change your quantity, MFK, comments, due date, inspection, and confirming order.

Running Total: $ 1,521.35
Attachments

If you need to include an Attachment, start by clicking the Browse button, locate file and click the Upload Attachment button. Once uploaded, select the Attachment Type from the drop down menu and select if it should be Sent to the Vendor or not. Click the Red X if the Attachment needs to be removed.

<table>
<thead>
<tr>
<th>Act</th>
<th>File Name</th>
<th>File Type</th>
<th>Attach Date</th>
<th>Attachment Type</th>
<th>Send to Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>MonthlyCreditLimit.pdf</td>
<td>application/pdf</td>
<td>05/20/2010 10:27AM</td>
<td>Quote</td>
<td>Yes</td>
</tr>
<tr>
<td>X</td>
<td>UIVAF.doc</td>
<td>application/msword</td>
<td>05/20/2010 10:28AM</td>
<td>Sole Source</td>
<td>No</td>
</tr>
<tr>
<td>X</td>
<td>National_Belgium.xlsx</td>
<td>application/vnd.openxmlformats-officedocument.spreadsheetml.sheet</td>
<td>05/20/2010 10:30AM</td>
<td>Invoice</td>
<td>No</td>
</tr>
</tbody>
</table>

Review, Add, or Edit Comments. Comments can be added to your Favorites to use for future orders. If comments were added on the Shopping Cart page, they will be transferred to the Requisition. Text entered in the Vendor Comments will print on the Purchase Order sent to the Vendor, while text entered in the Internal Comments will remain as a note for the Department and/or Purchasing department and text entered in the Receipt will print on the PO Receipt for Receivers to view.

If the order has already been placed to the vendor, click Yes.

☐ Yes  ☐ No  Has the order already been placed with the vendor for the goods or services? If "Yes" is selected, Purchasing will not send this order to the vendor.

☐ Check if this is a Prepayment. This is a Prepayment, payment will be sent separately from PO.

☐ View Sole Source Form

To Complete the Requisition, you can either Save, Validate or Void.

Save - Saves a requisition and allows you to work on it later

Validate - Validates all fields on the Requisition including the MFK.

Void - Voids the Requisition.

When the form is complete, click the Send to Workflow button. This will integrate with the Workflow system (Contact your Workflow Administrator if you have questions or concerns). Once Workflow is complete, the Requester, Initiator and Purchasing Agent will receive an email stating the assigned Purchase Order number, which then uploads to PeopleSoft and the PO is dispatched to vendor.
**Finalizing Workflow**

Workflow is the process of creating and approving various types of forms electronically. Based on predetermined Workflow Paths (as set by Org and Dept workflow administrators), these forms can be approved electronically and sent on to the next person in the approval path.

---

**PReq Sidebar**

The side on the PReq contains information about the Req and some links.

- **Req ID:** Is located on the sidebar at the top. A 10-digit number that begins with a W. The PReqs system electronically assigns the number after the Initiator saves or validates a requisition.
- **WFTx#:** Is located on the sidebar at the top. This is the Workflow transaction number that is assigned by workflow for tracking purposes.
- **Date:** Is located on the sidebar at the top. This is the date the requisition was created.
- **PO:** Is located on the sidebar at the top. A 10 digit number that begins with a 1 or B. This number is electronically assigned in the PReqs System after the last workflow approval.

---

**PReqs**

- **Create Req:** Requisitions going to outside vendors only.
- **Req Search Center:** Located on the sidebar, click on Search Center to find Requisitions. Granted by workflow administrator.
- **Order (catalog) Search Center:** Located on the sidebar, click on Search Center to find Catalog Orders. Granted by workflow administrator.
- **Return to Order:** Takes the user to the main Order entry page.
- **Copy Req:** Brings up an established Req you would like copied. Click Copy Req on the side bar. The information from the Req will be populated in a new record. Make any changes needed and send to workflow.
- **Copy Order:** Brings up established Catalog order you would like copied. Click Copy Order on the side bar. The information from the Order will be populated in a new record. Make any changes needed and send to workflow.
- **Find UI Contract:** Search for established University Contracts by Vendor, Category, or Products/Services.

---

**Favorites** - Frequently used information.

**Forms**

- **PReq Access:** Requesters link to add initiators
- **PReq Access Search:** Requesters link to search for initiator request status
- **Ship to Codes:** Request to add, change, or delete a Ship to code
- **Indiv Contractor Doc:** Payroll form link to pay contractors

---

**Purchasing Links**

- **Purchasing Contracts:** University of Iowa contracts are considered a primary tool for the departments to receive the best pricing and quality. Contact Purchasing Agents if you have questions.
- **Bids Opportunities:** Currently Active Bids
- **Iowa Prison Industries:** Web site showing Iowa Prison Industries Items.
- **Targeted Small Business:** System providing State of Iowa certified Targeted Small Businesses with advance notice of procurement opportunities.
- **Subagreements:** Division of Sponsored Programs web site to help users with subagreements.
e-forms: Electronic forms web site.

**Help Center**

- **Contact us:** Informational page for questions
- **Purchasing Policy Manual:** Link to manual with guidelines
- **PReqs Initiator Tutorial:** Document for requesters and initiators
- **Catalog Order Tutorial:** Document for requesters and initiators for use of catalog orders
- **Services Voucher Tutorial:** Document for help with services e-vouchers (payroll)
- **Non-Services Voucher:** Document for help with non-services e-vouchers
- **Freight Account:** Learn how getting a Freight account can save you money.
- **FAQ:** Frequently asked questions regarding PReqs and e-Vouchers
- **Requester Search:** This search will look in the Requester Code, Requestor Name, Location, and Department Name fields
The Search Center is granted by your workflow administrator.

You can search for Catalog orders using many different criteria on this page.

You can narrow the search by putting information in multiple fields.

SC Order ID is the number assigned to the Catalog Order.

Stock ID is the number assigned to Items sourced from a warehouse.

After you have the information in the fields you want to search on, click on Search at the top left of the Search Center page. A list of the requisitions that met the criteria you entered will be displayed.

Click on the Order # if you want to see the catalog order.

<table>
<thead>
<tr>
<th>Order #</th>
<th>Order Date</th>
<th>Initiator</th>
<th>End User</th>
<th>Status</th>
<th>Order Amt</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SC00000318</td>
<td>2007-07-12</td>
<td>jbergeron</td>
<td>Julie Bergeron</td>
<td>Complete</td>
<td>$240.00</td>
<td>Syringe Refill</td>
</tr>
<tr>
<td>SC00000382</td>
<td>2007-07-23</td>
<td>jbergeron</td>
<td>Julie Bergeron</td>
<td>Complete</td>
<td>$240.00</td>
<td>Syringe Refill</td>
</tr>
<tr>
<td>SC00000508</td>
<td>2007-08-22</td>
<td>jbergeron</td>
<td>Julie Bergeron</td>
<td>Complete</td>
<td>$9003.56</td>
<td>CUSHION CHAIR AIR FILLED</td>
</tr>
<tr>
<td>SC00000511</td>
<td>2007-08-23</td>
<td>jbergeron</td>
<td>Julie Bergeron</td>
<td>Complete</td>
<td>$5600.70</td>
<td>MIRROR CONE SOCKET PLAIN #4</td>
</tr>
<tr>
<td>SC00000559</td>
<td>2007-08-23</td>
<td>jbergeron</td>
<td>Julie Bergeron</td>
<td>Complete</td>
<td>$5421.61</td>
<td>TUBE RECTAL X-RAY OPAQUE NON-S</td>
</tr>
</tbody>
</table>
You can search for requisitions using many different criteria on this page.

You can narrow the search by putting information in multiple fields.

There are three main fields that users need to know how to search on.

**Requester Name:** If you use the criteria “Equal to”, you must enter the name using the following format: lastname,firstname no spaces. For example, Doe,Jane. If you use the criteria “Like” you can use the any part of the Requesters name, for instance just their last name. You then need to enter the wildcard * before and/or after the name. This type of search is helpful if you are not sure of exactly how the Requester’s name has been entered or how it is spelled.

**Vendor Name:** This works like the Requester Name search. If you use “Equal to” you must enter the complete vendor name and exact spelling. If you use the “Like” criteria, enter the wildcard of * before and/or at the end. For example, *Dell; Dell*, *Dell*, etc.

**Initiator (HawkID):** You must enter the Initiators official HawkID to use this search. To look up a HawkID, use the campus phone directory on the sidebar.

After you have the information in the fields you want to search on, click on “Search” at the top left of the Search Center page. A list of the requisitions that met the criteria you entered will be displayed.

### Search Center Results

<table>
<thead>
<tr>
<th>Req #</th>
<th>Initiator</th>
<th>End User</th>
<th>Status</th>
<th>PO ID</th>
<th>PO Date</th>
<th>PO Type</th>
<th>PO Status</th>
<th>Vendor Name</th>
<th>Req Amount</th>
<th>Description</th>
<th>Attach</th>
</tr>
</thead>
<tbody>
<tr>
<td>90001163223</td>
<td>Lehdcy</td>
<td>Chris</td>
<td>Workflow Complete</td>
<td>10000003979</td>
<td>2007-08-23</td>
<td>Regular Order</td>
<td>Dispatched</td>
<td>Thomson Publishing Company, Incorporated</td>
<td>2,000.00</td>
<td>test</td>
<td></td>
</tr>
<tr>
<td>90001163223</td>
<td>Jibergen</td>
<td>Julie</td>
<td>Workflow Complete</td>
<td>10000002880</td>
<td>2007-08-23</td>
<td>RFQ Order</td>
<td>Dispatched</td>
<td>News Publishing Company, Incorporated</td>
<td>7,287.00</td>
<td>Three Year ReNewal To Mi</td>
<td></td>
</tr>
<tr>
<td>90001163233</td>
<td>Jibergen</td>
<td>David</td>
<td>Request for Proposal</td>
<td>1000004613</td>
<td>2007-08-27</td>
<td>Regular Order</td>
<td>Dispatched</td>
<td>Koch Brothers</td>
<td>7,040.00</td>
<td>Laser LD435x Medical</td>
<td></td>
</tr>
<tr>
<td>90001163234</td>
<td>Reeves</td>
<td>James</td>
<td>Workflow Complete</td>
<td>10000022841</td>
<td>2007-08-22</td>
<td>Request for Proposal</td>
<td>Dispatched</td>
<td>CR Bard</td>
<td>1,451.10</td>
<td>X-Ray DPAQUE NON-S</td>
<td></td>
</tr>
</tbody>
</table>

Click on the Req # if you want to see the requisition or click on the PO number to see the PO report.

Users can search on and view all requisitions in the Preqs system, but can only edit the requisitions they initiated.
Catalog Order Guidelines

**Catalog Order:** Requesters must be assigned specific catalogs in order to be able to access the catalog and order the item. This order may contain multiple Warehouse and/or multiple Vendor items. These get assigned a 10-digit number beginning SC.

**PReqs Access Form:** This is required for all requesters to gain access to and complete orders.

**Stock requests:** (items sourced from a warehouse): these orders do not go through workflow. These get assigned a 10-digit number beginning in “0” also referred to as a “Stock ID”. These will be loaded into the PeopleSoft Financial System where they will be “picked” from the Warehouse.

**Items sourced from a vendor:** these orders may or may not require workflow depending on the workflow threshold limit approved by the department. These orders are assigned a 10-digit requisition ID beginning with “W”. These are loaded into the PeopleSoft Financial System and dispatched to the vendor by Purchasing.

**Workflow:** Paperless, electronic signature system.

**Workflow Threshold:** A workflow threshold is determined by the department for their catalog items on contracts. This threshold will be allowed by their department to place an order where contracted pricing has been established with the vendor. When creating a catalog order the requisition will be routed to workflow only if the requisition is over the requester’s workflow threshold limit for items sourced to a vendor (non-stock) orders.

**Requesters:** These are the people in the department who work directly with Purchasing and Accounts Payable to facilitate the procurement and payment process. Requesters may be contacted by Purchasing, Accounts Payable, or the vendor if a question arises regarding the Catalog Order. Users must either be a Requester or an initiator assigned to a specific requesters in order to be able to initiate transactions in PReqs. If a user signs in and is not a Requester or assigned to a requester(s), they will not be able initiate a requisition.

**Initiators:** An initiator is an individual assigned to a specific Requester(s) in order to be able to initiate transactions.