# ***Step-By-Step e-Procurement Instruction***

1. Go to www.savannahstate.edu
2. Click on the 'Home' radial button.
3. Scroll down to Business and Financial Affairs and click the link.
4. Go to the bottom middle of the Division of Business and Financial Affairs homepage and click on the Financial System Access link.
5. Log in using the same User ID and Password you use for Tiger Self-Service.
6. Click on e-Procurement in the Menu on the left side of the page.
7. Click on Create Requisition
8. Click on Define Requisition
9. The Business Unit and Requester should automatically default.
10. Type a name for your requisition in the Requisition Name Box. Examples are: Office Supplies, Furniture, Instructional Supplies, Computer, Printer, Software, Conference Registration, Membership Dues, Student Lodging, Student Airfare, etc.
11. Choose a Priority of High, Low, or Medium. The system will automatically default to Medium unless you change it.
12. Click on the arrow next to Line Defaults to expand the section.
13. Click the Looking Glass next to Vendor to recommend a Vendor. Keep in mind Purchasing has the authority to change a vendor based on State of Georgia guidelines requiring us to use State Contracts, Agency Contracts, and Statutory Sources. Type the name of the Vendor you are recommending on the line marked Name and click Find. If the vendor is in the system the system will find it. Be sure to spell the vendor name correctly. If you cannot locate the vendor by Name try the first three letters of the vendor name in the Short Vendor Name box and click Find. If the vendor is not in the system, please obtain a W-9 from the vendor and complete the Vendor Registration Form available on the Procurement Webpage. Please e-mail the documents to fulwoodp@savannahstate.edu or awilliam@savannahstate.edu so the vendor can be added to the system. Once the vendor has been added we will contact you via e-mail so you can complete your requisition.
14. Select the Vendor ID for the Main Location for that Vendor. You may see more than one listing but for Purchasing select the Main Location.
15. Click the Looking Glass next to Buyer and select either AWILLIAM, FULWOODP, or deweyd based on the commodity you are purchasing. See the list below. (Subject to Change)

***Alicia Williams***

- All Procurement $25,000 plus
- Computer Hardware
- Furniture
- Services and Maintenance Agreements
- Contractual Procurement over $100,000
- Equipment Purchases over $3,000 (Lab, Instructional, Office etc.)

***Pamela D. Fulwood***

- Office Supplies
- Software
- Study Abroad Student Travel
- Registrations, Memberships & Subscriptions
- Contractual Procurement under $100,000
- All Equipment, Instructional Supplies, (Lab, Classroom etc.) under $3,000

***Danielle Dewey***

- Student Travel
- Employee Airfare
- Employee Rental Vehicles

16. Click the Looking Glass next to Category and in the box marked Description: begins with and type in a one word description for what you are purchasing. Click Look Up to receive a list of choices. Choose the category that best describes what you are purchasing. If you are purchasing a variety of items from one vendor and cannot find a category to describe the entire purchase, then wait and choose the category when you enter each line. It is good practice to document you category codes for items purchased frequently. A listing is also available on the Procurement homepage as well.
17. Click the Looking Glass next to the Unit of Measure. Choose a Unit of Measure from the list of search results. If the Unit of Measure is not listed choose 'Each' as the Unit of Measure and specify in the Item Description.
18. Under Shipping Defaults click the calendar next to Due Date and choose the same date in the next month to allow for 30 days. If you get a warning box in reference to the date selected just click okay. This does not mean it will take 30 days to receive your merchandise; it is because we are Net 30 days.
19. Under the Accounting Defaults your account chartfield should have defaulted. If you are using a different account then the account you are paid out of, then change the chartfield to the account you are purchasing from.
20. Under Account, type in the account number for the items you are purchasing. The account number can be difficult to search for, so please see the document ***"Frequently Used Account Numbers"*** available on the Procurement Webpage. If you need further assistance, please contact the Office of Procurement.
21. Click Continue
22. Click on Section 2 Add Item and Services. Click the blue tab marked Special Request.
23. Click on Special Item in the box.
24. Click in the box for Item Description and type the description of the 1st item you are purchasing.
25. Click in the box for Price and type in the price of the item. You do not need to use the $ symbol but you do need to use decimal points if cents are involved.
26. Click the box for Quantity and type in the quantity you would like to order.
27. Click in the box for Vendor Item ID and type in the item number for the item you are purchasing.
28. Under Additional Information type in any other information related to this item such as dates, times, quote numbers, etc. Indicate if the additional information should be sent to the vendor, shown on receipt, or shown on voucher. Hint: Quote Numbers should be sent to vendor.
29. Note: Your Category, Vendor ID, and Unit of Measure will default to each item added. When you have a variety of item from one vendor and you did not select a Category or Unit of Measure in the Line Defaults area, you can select them at this time. You will have to do this step for each line you add.
30. Click Add Item
31. If you have more items, repeat the process to continue to add items.
32. Once all items are added, click on Review and Submit.
33. If your supervisor or Title III requires a justification, type your justification or any other necessary comments in the section Justification/Comments.
34. If you have a quote from the vendor, please scan and save your quote. Click the comments bubble next to the line item associated with the quote and click Add Attachment.
35. Click Browse and look for your saved quote. Double-click on your file and click Upload. Then click Send to Vendor and click OK.
36. If you changed the Account Chartfield to a different account, click Select All under Requisition Lines. Then click Modify Line/Shipping/Accounting. At the bottom right, click on Load Values from Defaults and click Apply. Then click All Distribution Lines and click OK. If you are changing the Account Chartfield to a Grant Account then on the last step click Replace Distribution Lines and click OK.
37. If you need to charge a line on the requisition to more than one Account Chartfield, select the line and click Modify Line/Shipping/Accounting. Click load values from default if the default Account Chartfield is one of the accounts to charged. Click the plus sign next to the line. Enter the Account Chartfield you want to charge and indicate the percentage to be charged to each department. Click Replace Distribution Lines and then click apply.

38. Click Save and Preview Approval.
39. Make sure everything is correct. If you need to make a correction, slick Edit Requisition and make corrections and then click Save and Preview Approval. If you need to insert an Approver or Reviewer click the green plus sign next to the 1st Approval Line Level Individual. Click the looking glass next to User ID. Search for the person you want to insert and click their name. Then choose Approver or Reviewer and click Insert. Click the red minus sign to delete an additional Approver or Reviewer.
40. Click Submit and you are done.
41. At the bottom you can View Printable Version and print the completed Requisition, go to Manage Requisitions to review all submitted Requisitions, or go to Create Requisition to create another Requisition.