

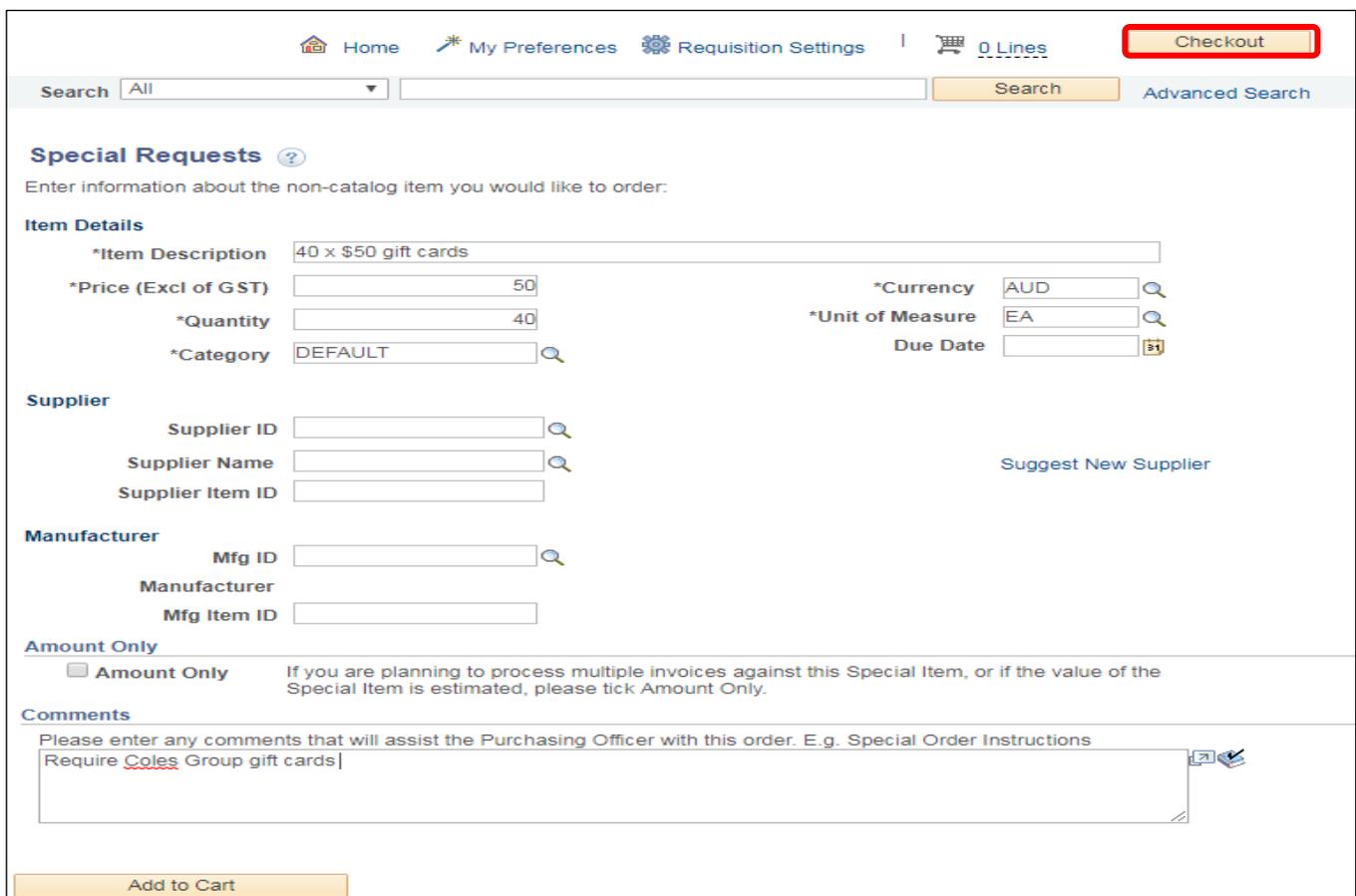
ePro - Favourite Projects

Introduction

This function enables you to list and save your most used project codes and how to use your favourite projects when creating a Requisition.

Procedure

Create your Requisition and when completed go to **Checkout**.



Home My Preferences Requisition Settings 0 Lines **Checkout**

Search All Search Advanced Search

Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description 40 x \$50 gift cards

*Price (Excl of GST) 50

*Quantity 40

*Category DEFAULT

*Currency AUD

*Unit of Measure EA

Due Date

Supplier

Supplier ID

Supplier Name

Supplier Item ID

Suggest New Supplier

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Amount Only

Amount Only If you are planning to process multiple invoices against this Special Item, or if the value of the Special Item is estimated, please tick Amount Only.

Comments

Please enter any comments that will assist the Purchasing Officer with this order. E.g. Special Order Instructions

Require Coles Group gift cards

Add to Cart

1. Setting up Favourite Projects

1.1 To set up your favourite projects click on **Manage my Projects**

Checkout - Review and Submit
Review the item information and submit the req for approval.

My Preferences Requisition Settings **Manage My Projects**

Requisition Summary

Business Unit: UNIAD Adelaide University
Requester: a1650779 Yates, Teresa
Requisition Name: [input field]
*Currency: AUD

Cart Summary: Total Amount 2,000.00 AUD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments/ Attachments	Delete
1	40 x \$50 gift cards			40.0000	Each	50.0000	2000.00			

Select All / Deselect All Select lines to: Add to Favorites Delete Selected Mass Change

Total Amount 2,000.00 AUD

Shipping Summary

Edit for All Lines

Ship To Location: NTRMP03
Address: Reception, Level 3, Rundle Mall Plaza
50 Rundle Mall
North Terrace Campus
ADELAIDE, SA 5005
Attention To: Yates, Teresa

Save & submit Save for Later Add More Items

1.2 Enter your favourite project code(s) in the **search box**, to keep adding project codes click on the **plus** sign to add more lines. If you no longer wish to use a project code, you can delete the row by clicking the **minus** sign.

My Projects

My Projects

Personalize | Find | View All | [print] | [refresh]

Project	Description		
[input field]		+	-
2 15017100	Strategic Procurement	+	

OK Cancel Apply

1.3 Click **OK** when you have completed your list.

2. Using Favourite Projects

2.1 Expand the **arrow** on the Line Description

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: UNIAD Adelaide University
Requester: a1650779 Yates, Teresa
Requisition Name:
*Currency: AUD

Cart Summary: Total Amount 80.00 AUD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments/ Attachments	Delete
1	gift cards			2.0000	Each	40.0000	80.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Delete Selected Mass Change

Total Amount 80.00 AUD

2.2 Expand the **Accounting Lines** arrow

Accounting Lines

*Distribute By: Qty SpeedChart *Liquidate By: Amt

Accounting Lines Personalize | Find | View All | First 1 of 1 Last

Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		NTRMP03	2.0000	100.0000	80.00	UNIAD	

Select All / Deselect All Select lines to: Add to Favorites Delete Selected Mass Change

Total Amount 80.00 AUD

2.3 Click on the **Chartfield Tab** where your project field is visible (depending on the way you have personalised your Requisition – refer below, it could be on Chartfield Tab 1, 2 or 3) click on the **magnify glass**.

Accounting Lines

*Distribute By: Qty SpeedChart *Liquidate By: Amt

Accounting Lines Personalize | Find | View All | First 1 of 1 Last

Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2 Budget Information

Project	Activity	Class
15017100	0001	

Personalising your Requisition allows you to access relevant information without having to tab through multiple tabs to review and edit the data. The personalisation choices you make will remain the same for all your Requisitions until you edit the fields again. Refer to the [Personalisation Guide](#) for steps on how to do this.

2.4 Ensure the **My Projects only** is ticked and click Look Up, you can untick this box to search other Projects that are not listed in your favourites. Select the project code you require for your Requisition purchase.

Look Up Project [X]

Project begins with []
Description begins with []

My Projects only

Look Up Clear Cancel Basic Lookup

Search Results

Project
15017100
15017200

2.5 The selected project code will be used for your Requisition

Accounting Lines Personalize | Find | View All | [] [] First 1 of 1 Last

Chartfields1 Chartfields2 **Chartfields3** Details Details 2 Asset Information Asset Information 2 Budget Information

Project	Activity	Class
15017200	0001	

3. Changing multiple lines on your requisition using **Mass Change**

3.1 If you have multiple lines for your Requisition, you can do a Mass Change. Click on **Mass Change**

Requisition Lines [?]

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments/ Attachments	Delete
1	gift cards			10.0000	Each	40.0000	400.00	[]	[] Add	[]

Select All / Deselect All Select lines to: [] Add to Favorites [] Delete Selected **[] Mass Change**

Total Amount 400.00 AUD

3.2 Click on Chartfields2 or Chartfields3 to view the **Fund**, **Dept** and **Project**. Enter the project code; Dept and Fund code you want to use for your Requisition and click **OK**

Edit Lines/Shipping/Accounting for Selected Lines

Line Information ?

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID [] Supplier Location []
Buyer [] Category []

Shipping Information

Ship To Location []
Due Date [] Attention []

Accounting Lines

SpeedChart []

Please enter GL Business Unit before selecting other chartfield values

Accounting Information Personalize | Find | First 1 of 1 Last

Chartfields1 | **Chartfields2** | Chartfields3 | Details | Asset Information

Fund [] Dept [] Campus [] Bud Ref [] Project []

Load Values From Defaults

OK Cancel

3.3 Choose the **action** to make the change and click **OK**.

Distribution Change Options

For the selected requisition lines that are available for sourcing, apply distribution changes to

All Distribution Lines
Apply changes to all existing distribution lines.

Matching Distribution Lines
Apply changes to each existing distribution line by matching the distribution line numbers.

Replace Distribution Lines
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

You will then go back to the Checkout – Review & Submit screen. Click **Save and Submit** when the Requisition is completed.

Further written and digital guides are available on [eProcurement Online Resources](#) webpage.

Contact Us

For further support or questions, please contact the Finance and Procurement Support Team.
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