



Where do I begin?

eReq is a web-based application used for processing requisitions and viewing their current status.

1. Go to eReq your favorite way:

- From your **Internet Browser** go to:
buffalo.edu/procurement
- Click on **eReq Login** button on the left side

Or
- Go to MyUB <https://myub.buffalo.edu>
- From the Administrative Menu, **click** Business then **eReq- purchase requisition** from the list of Business Systems

Supplier Information

https://myub.buffalo.edu/supplier/pw/reg_scripts/menu.cgi

This application allows you to search the UB Supplier File (UBSF).

Helpful Hints

- Use your **Tab** key to move around the application.
- Click **Refresh** to update and refresh your **Inbox** and **Completed** tabs.
- Be sure to accurately select your **Requested Delivery** date on the **Ship to** screen. This information is seen in the Purchasing buyer's **Inbox**.

Actions and Results

When you select an action on the **My Actions** tab, these are the results.

Your Action	The Incident
Save without Submit.....	Goes to your Inbox without being processed.
Route to Approver.....	Is forwarded to Approver 1, 2 or 3.
Approve.....	Is approved and sent to Purchasing (or, if selected, to Radiation Protection or Lab Animal Facilities for approval)
Reject	Is returned back to the previous step.
Cancel	Is forever removed from the eReq database.

Screens and Their Uses

Initiate Screen/tab: displays the eReq process name and program version number.
This is where you begin a new eReq incident.

Inbox Screen/tab: displays your active incidents, along with delivery, step name, time due, and supplier name.
This is how you access your eReq tasks (work to do).

Completed Screen/tab: displays your history of submitted incidents with all pertinent step information.

Queue Screen/tab: displays all the incidents in your assigned queue, listed with step name, requested delivery, start time, supplier name and initiator. From here you select the incidents to be moved to your **Inbox**.
This screen is not available for Creators or Approvers.

History Screen (from Completed tab): displays the step status (completed or active), client (the step owner) and the step completion time

Completed Refresh | 1/30

Active Process: eReq

Workflow | Manage tasks | Administrator | Charts | Settings | Reports

Inbox | Inbox | Completed | Queue | User Preferences

Go | Set Process | Add Filter

History is Cleared Link

Historical status for incident #357867

Step	Client	Completion Time	Action	Status
Begin	Veronica Wiles	06/25/2014 08:59:22 AM	Route to Approver (select recipient below)	Completed
Approval	Timothy Leah	06/26/2014 10:17:23 AM	Approve	Completed
Buyer	Ryan Lyszcz	06/26/2014 03:27:42 PM	Submit	Completed
Supplier/Maintenance	Jennifer Russa	06/27/2014 07:51:34 AM	Take from Queue	Completed
Supplier/Maintenance	Jennifer Russa	07/07/2014 02:35:28 PM	Submit	Completed
Buyer	Ryan Lyszcz	07/07/2014 02:56:44 PM	Submit	Completed
Silverstream	Workflow	07/09/2014 11:10:21 AM	Submit	Completed
End	Workflow	07/09/2014 11:10:21 AM	End	Completed

Need Help? If you need additional help, contact Ali Meadows, alisonma@buffalo.edu, 645-4521

Glossary of eReq Terms

Approver: The role assigned to eReq program users who authorize Purchase Requisitions.

Creator: The role assigned to eReq program users who initiate (or begin) a new electronic requisition.

eReq: An Electronic Purchase Requisition created in the eReq application.

Incident # (or eReq Incident): An internal number that is system assigned to an electronic requisition (eReq) is displayed at the top of an eReq and used for tracking purposes.

Required fields: * (indicated by an asterisk) Data fields that are role specific and must be filled in before an incident can be moved to the next step in the eReq process.

Role: A program designation that defines what your eReq steps will be, i.e. Creator, Approver

Step: One in a series of actions that must be taken to move an eReq. Each step is Role specific and must be completed by a person having the assigned role, for example: Begin, Approver1, Approver 2, Buyer

URL: Uniform Resource Locator is a string of characters conforming to a standardized format used to direct you to a resource on the Internet

Workflow: the process of moving work from one place to another electronically.

Scanning your attachments:

Attachments can be **no larger** than 2 megabytes each and in one of the following formats: MS Word, MS Excel, Adobe PDF or images in JPG, GIFF or TIFF formats. In order to attach a document, it must first be saved in a drive or file you have access to.

Select an **Attachment Type**. Accurately describe your attachment, i.e., invoice, specifications, departmental justification for easy identification.

How to reduce your attachments size:

Requirement: *Adobe Acrobat 10.0 (or higher)*

1. Scan your attachments in black & white rather than color to save space (Change current color PDF files to b&w will also save space.)
2. Open your scanned or electronic file
3. Select **Save As > Optimized PDF**

Summary Sheet Hints

Print a **Summary** from your **Completed** tab only **after** you have submitted the incident to your **Approver** or sent it to Purchasing for processing.

Prior to this **Approver** action, a requisition number has not yet been assigned and you will only have an incident number available for reference and/or tracking.

The online **Summary** will continue to update after each future step is completed until it becomes a purchase order.

Reminders

- An email notification will be sent when an order has been completed. This email and your updated **Summary** (*after* the email is sent) are your official documents.
- Use the **Notes** tab to convey relevant information to others within the process.
- **State** accounts are 10 digits, 6 for the account number and 4 zeros if you do not have a sub account. If you have a sub, use the next 2 digits for the sub and 2 zeros.

Workflow Process Map shows how an electronic requisition (eReq incident) is routed to the Purchasing Department. The roles associated with each workflow step are listed directly below the step.

