

# Training Guide for Chemistry Stores Customers

## How To Update Your Default MFK

**\*Note: if you need help filling out this form email [evelyn-knight@uiowa.edu](mailto:evelyn-knight@uiowa.edu) to set up a time to get help in-store or over email. \***

### **Step 1:**

Open the E-Pro system in your browser:

<https://preqs.its.uiowa.edu/preqs/home.page?requisition.home=true>

Login with your Hawk ID and password. Your screen should look like the one below.

Click “Forms” on the left hand side of the screen.

**PReq Home**

**Requisitions**

- [Browse](#) 0 requisitions in workflow.
- [Browse](#) 0 draft requisitions.
- [Browse](#) 0 today's requisitions.
- [Browse](#) 0 created during the past 5 days.
- [Browse](#) 0 created during the past 30 days.
- [Browse](#) 0 created during the past 60 days.
- [Browse](#) 0 locked in Universal Workflow.
- [Browse](#) 0 all of my requisitions.
- [Search my requisitions.](#)

**Inventory Catalog Orders \***

- [Browse](#) 1 Draft
- [Browse](#) 0 In Progress
- [Browse](#) 0 Complete
- [Browse](#) 0 Cancelled within the last 30 days
- [Browse](#) 21 All of my Stock Orders
- [Browse](#) 0 Recurring Orders
- [Search my orders.](#)

\* Supply Items sourced from a Warehouse and/or Vendor

**Purchase Orders**

- [Browse](#) 0 today's purchase orders.
- [Browse](#) 0 created during the past 5 days.
- [Browse](#) 5 created during the past 30 days.
- [Browse](#) 12 created during the past 60 days.
- [Browse](#) 12 all of my purchase orders.

**eBuy Shopping Carts**

- [Browse](#) 0 Draft eBuy Shopping Carts
- [Browse](#) 0 today's eBuy Shopping Carts
- [Browse](#) 0 loaded from eBuy the past 5 days
- [Browse](#) 0 loaded from eBuy the past 30 days
- [Browse](#) 0 loaded from eBuy the past 60 days
- [Browse](#) 0 All of my eBuy Shopping Carts

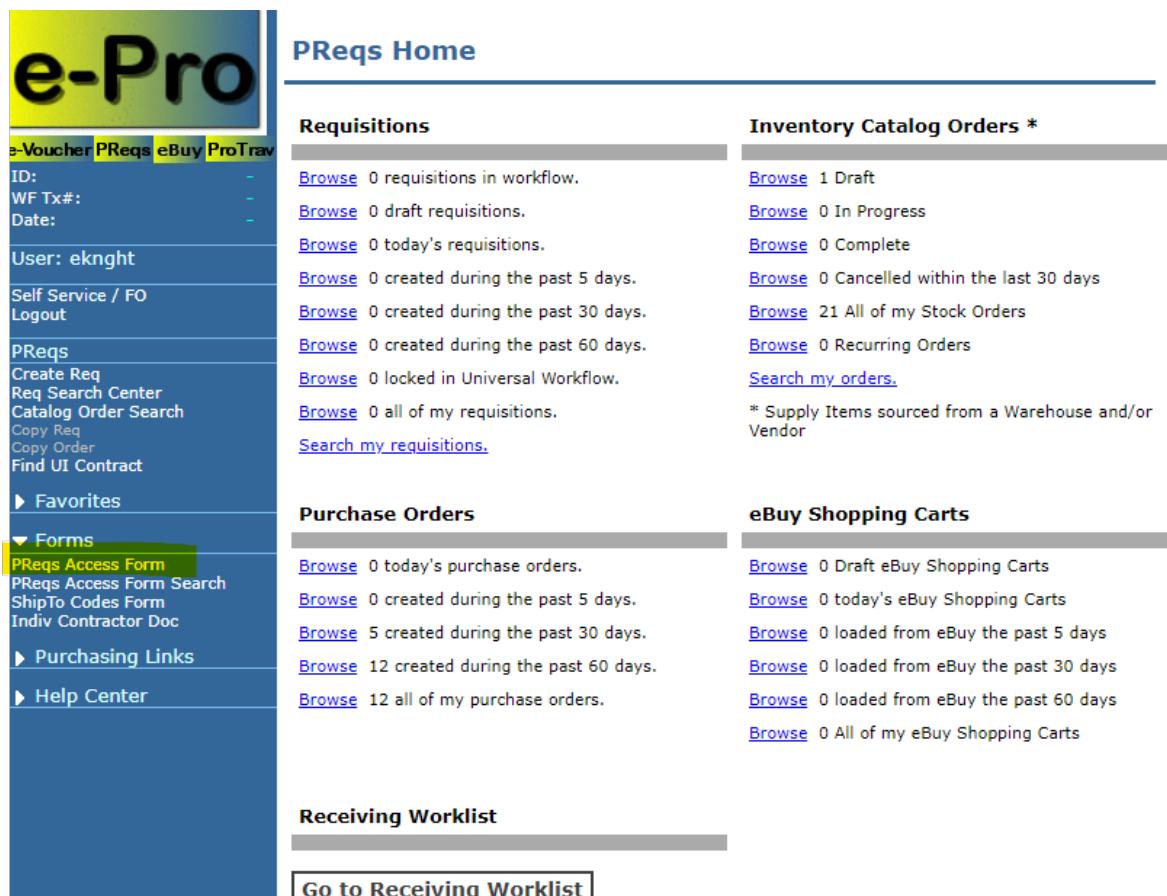
**Receiving Worklist**

[Go to Receiving Worklist](#)

## **Step 2:**

After you click “Forms” the dropdown menu will appear.

Click “Preqs Access Form”.



The screenshot shows the e-Pro PReq Home page. The left sidebar has a yellow-to-blue gradient header with the 'e-Pro' logo. Below it are links: e-Voucher, PReq, eBuy, ProTrav, ID: -, WF Tx#: -, Date: -. Under 'User: eknight', it shows Self Service / FO Logout, PReq links (Create Req, Req Search Center, Catalog Order Search, Copy Req, Copy Order, Find UI Contract), Favorites (dropdown), Forms (dropdown, with 'PReq Access Form' highlighted in yellow), Purchasing Links, and Help Center. The main content area has a blue header 'PReq Home'. It contains several sections with links: 'Requisitions' (Browse 0 requisitions in workflow, Browse 0 draft requisitions, Browse 0 today's requisitions, Browse 0 created during the past 5 days, Browse 0 created during the past 30 days, Browse 0 created during the past 60 days, Browse 0 locked in Universal Workflow, Browse 0 all of my requisitions, Search my requisitions), 'Inventory Catalog Orders \*' (Browse 1 Draft, Browse 0 In Progress, Browse 0 Complete, Browse 0 Cancelled within the last 30 days, Browse 21 All of my Stock Orders, Browse 0 Recurring Orders, Search my orders, \* Supply Items sourced from a Warehouse and/or Vendor), 'Purchase Orders' (Browse 0 today's purchase orders, Browse 0 created during the past 5 days, Browse 5 created during the past 30 days, Browse 12 created during the past 60 days, Browse 12 all of my purchase orders), 'eBuy Shopping Carts' (Browse 0 Draft eBuy Shopping Carts, Browse 0 today's eBuy Shopping Carts, Browse 0 loaded from eBuy the past 5 days, Browse 0 loaded from eBuy the past 30 days, Browse 0 loaded from eBuy the past 60 days, Browse 0 All of my eBuy Shopping Carts), and 'Receiving Worklist' (Go to Receiving Worklist). The 'eBuy Shopping Carts' section has a note: '\* Supply Items sourced from a Warehouse and/or Vendor'.

### **Step 3:**

The screen should then look like the one below. Your information should appear under “applicant information”.

Fill in the MFK you need access to in the boxes provided.

For self-checkout purposes you will need to have the iact box filled with the numbers 6115, despite what you may normally use for the iact in your MFK.

The box which says slid/slac above it needs to have “NA” in the box.

**PReqs Access Form**

**Applicant Information**

Requester Code:	EKNIGHT	Add <input type="button" value="▼"/>										
Name:	Evelyn Knight											
Email:	evelyn-knight@uiowa.edu											
University ID:	[REDACTED]											
Campus Addr:	W93 CB											
User: eknight	Phone: +1 319 467 0968											
Self Service / FO Logout	Dept: 1070											
PReqs	Dept Name: Clas-Chemistry											
Create Req	Outgoing requester: [REDACTED]											
Req Search Center	Reason for replacement: None											
Catalog Order Search	<b>Default MFK:</b> Enter a default MFK. A default MFK must be assigned to each requester. This MFK will be used on all requisitions to minimize data entry on the form. This MFK can be changed by the user and individuals on the PReq workflow path after the initial default of values.											
Copy Req	fund	org	dept	sdept	grnt/prgrm	iact	oact	dact	func	cctr	slid/slac	
Copy Order	000	00	0000	00000	00000000	00000	00000	00000	00	0000	[REDACTED]	
Find UI Contract												
▶ Favorites												
▶ Forms												
▶ Purchasing Links												
▶ Help Center												
<b>Initiators:</b> List initiators who are allowed to order with your requester code. Leave blank if no one can use your requester code.												
Action	HawkID		Name									
<input type="button" value="X"/>	<input type="button" value="+"/>	[REDACTED]	<input type="button" value="🔍"/>									
<b>Catalog Order Form:</b> If you are going to be ordering PeopleSoft item number parts that are sourced from a warehouse or from a vendor, you must complete the following information. This form will be used by departments that have UI items numbers set up.												
<b>Workflow threshold limits for catalog items on contracts:</b> The requester must specify the dollar threshold per order per vendor that will be allowed by their department to place an order where contracted pricing has been established with the vendor. When creating catalog orders the requisition will be routed for workflow only if the requisition is over the requester's threshold limit for non-stock orders.												
Threshold limit for catalog orders: <input type="text" value="0.0"/>												
<b>Catalogs assigned to the requester:</b> If you will be using the supply items form, you must be assigned specific catalogs from which to order.												
Action	Catalog		Catalog Description									
<input type="button" value="X"/>	<input type="button" value="+"/>	[REDACTED]	<input type="button" value="🔍"/>									
Comments:												
Before receiving access to the PReqs application, you must take the Procure to Pay training class.												
Save	Validate	Send to Workflow	Void									

## Step 4:

Once your MFK has been filled in, and you have made sure the slid/slac box contains NA and the iact box contains 6115 you can move on to this next step.

Press the spy glass to the right of the catalog box.

**e-Pro**

**PReqs Access Form**

**Applicant Information**

Requester ID:	EKNIGHT	Add ▾
Name:	Evelyn Knight	
Email:	evelyn-knight@uiowa.edu	
University ID:	[REDACTED]	
Campus Addr:	W93 CB	
Phone:	+1 319 467 0968	
Dept:	1070	
Dept Name:	Clas-Chemistry	
Outgoing requester:	[REDACTED]	
Reason for replacement:	None	▼

**Default MFK:** Enter a default MFK. A default MFK must be assigned to each requester. This MFK will be used on all requisitions to minimize data entry on the form. This MFK can be changed by the user and individuals on the PReq workflow path after the initial default of values.

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	func	cctr	slid/slac
000	00	0000	00000	00000000	0000	0000	00	0000	00	0000

**Initiators:** List initiators who are allowed to order with your requester code. Leave blank if no one can use your requester code.

Action	HawkID	Name
x	[REDACTED]	[REDACTED]
+	[REDACTED]	[REDACTED]

**Catalog Order Form:** If you are going to be ordering PeopleSoft item number parts that are sourced from a warehouse or from a vendor, you must complete the following information. This form will be used by departments that have UI items numbers set up.

**Workflow threshold limits for catalog items on contracts:** The requester must specify the dollar threshold per order per vendor that will be allowed by their department to place an order where contracted pricing has been established with the vendor. When creating catalog orders the requisition will be routed for workflow only if the requisition is over the requester's threshold limit for non-stock orders.

Threshold limit for catalog orders:

**Catalogs assigned to the requester:** If you will be using the supply items form, you must be assigned specific catalogs from which to order.

Action	Catalog	Catalog Description
x	[REDACTED]	[REDACTED]
+	[REDACTED]	[REDACTED]

Comments:

Before receiving access to the PReqs application, you must take the Procure to Pay training class.

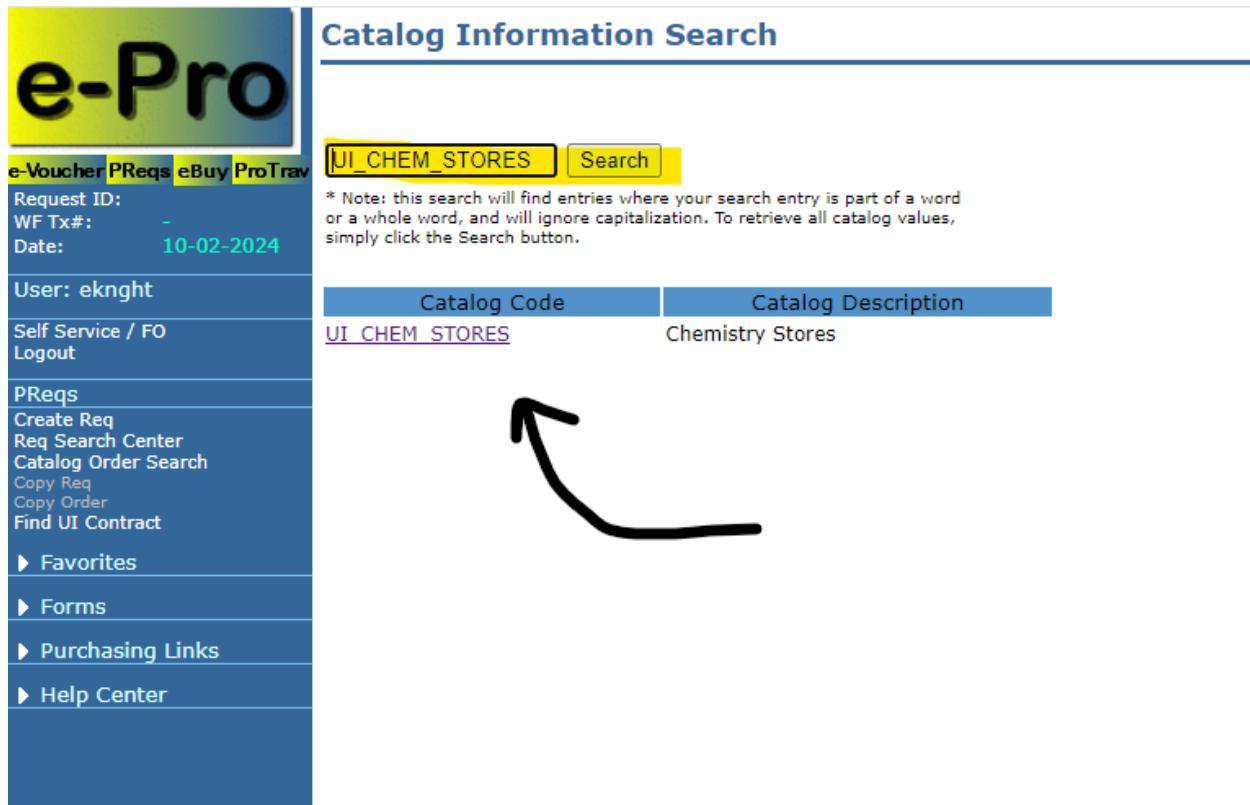
**Buttons:**

Save | Validate | Send to Workflow | Void

## **Step 5:**

Type “UI\_CHEM\_STORES” into the box that comes up, and press search.

Click the “UI\_CHEM\_STORES” hyperlink that comes up.



**Catalog Information Search**

UI\_CHEM\_STORES **Search**

\* Note: this search will find entries where your search entry is part of a word or a whole word, and will ignore capitalization. To retrieve all catalog values, simply click the Search button.

Catalog Code	Catalog Description
<a href="#">UI_CHEM_STORES</a>	Chemistry Stores

## **Step 6:**

The hyperlink will populate the catalog box and take you back to the form.

You will need to put a dollar amount within the “Threshold limit for catalog orders” box. Within this box put in “0.01”.

**e-Pro**

**PReqs Access Form**

**Applicant Information**

Requester Code:	EKNIGHT	Add <input type="button" value="▼"/>
Name:	Evelyn Knight	
Email:	evelyn-knight@uiowa.edu	
University ID:	████████	
Campus Addr:	W93 CB	
Phone:	+1 319 467 0968	
Dept:	1070	
Dept Name:	Clas-Chemistry	
Outgoing requester:		
Reason for replacement:	None <input type="button" value="▼"/>	

**Default MFK:** Enter a default MFK. A default MFK must be assigned to each requester. This MFK will be used on all requisitions to minimize data entry on the form. This MFK can be changed by the user and individuals on the PReq workflow path after the initial default of values.

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	func	cctr	slid/slac
000	00	0000	00000	00000000	0000	000	00000	00	0000	

**Purchasing Links**

**Initiators:** List initiators who are allowed to order with your requester code. Leave blank if no one can use your requester code.

Action	HawkID	Name
<input type="button" value="X"/>	<input type="button" value="+"/>	<input type="text"/>

**Catalog Order Form:** If you are going to be ordering PeopleSoft item number parts that are sourced from a warehouse or from a vendor, you must complete the following information. This form will be used by departments that have UI items numbers set up.

**Workflow threshold limits for catalog items on contracts:** The requester must specify the dollar threshold per order per vendor that will be allowed by their department to place an order where contracted pricing has been established with the vendor. When creating catalog orders the requisition will be routed for workflow only if the requisition is over the requester's threshold limit for non-stock orders.

Threshold limit for catalog orders:

**Catalogs assigned to the requester:** If you will be using the supply items form, you must be assigned specific catalogs from which to order.

Action	Catalog	Catalog Description
<input type="button" value="X"/>	<input type="button" value="+"/>	<input type="text" value="UI_CHEM_STORES"/>

Comments:

## **Step 7:**

The last step will be filling in the “comments” box.

Please type in “update default MFK on file”. This will help them add you into the system properly.

**PReqs Access Form**

**Applicant Information**

Requester Code:	EKNIGHT	<input type="button" value="Add ▾"/>
Name:	Evelyn Knight	
Email:	evelyn-knight@uiowa.edu	
University ID:	001001555	
Campus Addr:	W93 CB	
Phone:	+1 319 467 0968	
Dept:	1070	
Dept Name:	Clas-Chemistry	
Outgoing requester:		
Reason for replacement:	None	

**Default MFK:** Enter a default MFK. A default MFK must be assigned to each requester. This MFK will be used on all requisitions to minimize data entry on the form. This MFK can be changed by the user and individuals on the PReq workflow path after the initial default of values.

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	func	cctr	slid/slac
000	00	0000	00000	00000000	0000	0000	000	00	0000	

**Initiators:** List initiators who are allowed to order with your requester code. Leave blank if no one can use your requester code.

Action	HawkID	Name
×		
+		

**Catalog Order Form:** If you are going to be ordering PeopleSoft item number parts that are sourced from a warehouse or from a vendor, you must complete the following information. This form will be used by departments that have UI items numbers set up.

**Workflow threshold limits for catalog items on contracts:** The requester must specify the dollar threshold per order per vendor that will be allowed by their department to place an order where contracted pricing has been established with the vendor. When creating catalog orders the requisition will be routed for workflow only if the requisition is over the requester's threshold limit for non-stock orders.

Threshold limit for catalog orders:

**Catalogs assigned to the requester:** If you will be using the supply items form, you must be assigned specific catalogs from which to order.

Action	Catalog	Catalog Description
×	UI_CHEM_STORES	Chemistry Stores
+		

**Comments:**

update default MFK on file

**Before receiving access to the PReqs application, you must take the Procure to Pay training class.**

## **Step 8:**

Press Validate, and then Send to Workflow. Follow the continue buttons after your DUO authentication request until it says form submitted.

If any errors occurred, red error messages will tell you what needs to be corrected.

If there are no errors, your request has been submitted and sent to workflow.

Once workflow members have approved your request, your access will be granted.

**PReqs Access Form**

**Applicant Information**

Requester Code:	EKNIGHT	Add <input type="button" value="▼"/>
Name:	Evelyn Knight	
Email:	evelyn-knight@uiowa.edu	
University ID:	01800000000000000000	
Campus Addr:	W93 CB	
Phone:	+1 319 467 0968	
Dept:	1070	
Dept Name:	Clas-Chemistry	
Outgoing requester:		
Reason for replacement:	None	<input type="button" value="▼"/>

**Default MFK:** Enter a default MFK. A default MFK must be assigned to each requester. This MFK will be used on all requisitions to minimize data entry on the form. This MFK can be changed by the user and individuals on the PReq workflow path after the initial default of values.

fund	org	dept	sdept	grnt/prgm	iact	oact	dact	func	cctr	slid/slac
000	00	0000	00000	00000000	0000	000	00000	00	0000	

**Initiators:** List initiators who are allowed to order with your requester code. Leave blank if no one can use your requester code.

Action	HawkID	Name
<input type="button" value="X"/>	<input type="button" value="+"/>	<input type="text"/>

**Catalog Order Form:** If you are going to be ordering PeopleSoft item number parts that are sourced from a warehouse or from a vendor, you must complete the following information. This form will be used by departments that have UI items numbers set up.

**Workflow threshold limits for catalog items on contracts:** The requester must specify the dollar threshold per order per vendor that will be allowed by their department to place an order where contracted pricing has been established with the vendor. When creating catalog orders the requisition will be routed for workflow only if the requisition is over the requester's threshold limit for non-stock orders.

Threshold limit for catalog orders:

**Catalogs assigned to the requester:** If you will be using the supply items form, you must be assigned specific catalogs from which to order.

Action	Catalog	Catalog Description
<input type="button" value="X"/>	<input type="button" value="+"/>	<input type="text" value="UI_CHEM_STORES"/> <input type="button" value="🔍"/>
Chemistry Stores		

Comments:

update default MFK on file

**Before receiving access to the PReqs application, you must take the Procure to Pay training class.**

**Reminder:** this form will set up your account to have the MFK you provided on the form. If you have additional MFKs you will need to add them after your access is granted.

**Tip:** The “Self-Checkout Training” tab on our Chemistry Stores website has information on how to add your other MFKs, if needed.