

## Create a new EIOR request

Click on **Create** Link to start a new EIOR.

**DEPARTMENT OF ADMINISTRATION**  
Online Electronic Inter Office Requisition (Training)

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### EIOR - Create New Request

Required fields marked with \*

Type of Purchase: ?*	Goods
EIOR Title: ?*	Printer
Previous PO# (or EIOR#): ?	
Date PO Needed: ?*	6/10/2016 (mm/dd/yyyy)
Price Obtained by: *	Phone Quote (If obtaining a quote, remember the cost for shipping)
Fiscal Year:*	2016
Contract No (if known): ?	
SWIFT Vendor # (if known): ?	
Agency/Division: ?*	G02_Financial Mgmt And Rptg <input type="checkbox"/> Make This My Default Agency/Division
Ship To: ?*	Financial Mgmt & Reporting <input type="checkbox"/> Make This My Default Ship To
Bill To: ?*	Financial Mgmt & Reporting <input type="checkbox"/> Make This My Default Bill To
Will there be multiple ship to addresses?: ?*	No
Supervisor Approver: ?*	Douglas, Rachel - rachel.douglas@state. <input type="checkbox"/> Make This My Default Approver
Creator Comments:	Need ASAP

*As the creator of this EIOR you will be responsible for making sure it progresses in a timely fashion.*

Fields marked with an \* are required fields. All other fields are optional.

1. Type of Purchase from drop down selection: Select the appropriate option for the purchase requisition
2. EIOR Title: Enter title of your purchase – a general description of what is requested
3. Previous PO# (or EIOR#): If applicable, enter the EIOR ID for an Authorization of Travel form or a Special Expense form; or if referencing a previous Purchase Order (PO) or similar purchase
4. Date PO Needed: The date is populated based on EIOR creation date with a three day lead time and can be changed as needed
5. Price Obtained by: Select the appropriate option based on how price was obtained
6. Fiscal Year: The Fiscal Year (FY) will be populated based on the current FY
7. Contract No (if known): Enter contract number if the requisition and PO will reference a SWIFT contract

8. Agency/Division: Select the appropriate selection. Available options will be based on User ID
9. Ship To: Select the appropriate option
10. Bill To: Select the appropriate option
11. Will there be multiple ship to addresses? Select the appropriate option
12. Supervisor Approver: Select the requester's supervisor or appropriate option
13. Creator Comments: Enter any notes in the comments field

Click on **Next** to proceed with creation of the EIOR or **Cancel** to delete the EIOR.  
 If you click on Next to proceed, this will create an EIOR with an assigned EIOR number.

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**Funding Information:**

**EIOR - Create New Request**  
 Required fields marked with \*

EIOR ID:	7846	
Type of Purchase:	Goods	
EIOR Title:	<input type="text" value="Printer"/>	<b>Funding Information</b>
Comments:	<input type="text" value="Need ASAP"/>	Funding Type: Dollar <input type="text"/>
Previous PO# (or EIOR#):	<input type="text"/>	<a href="#">Add Funding</a>
Date PO Needed:	<input type="text" value="6/10/2016"/> (mm/dd/yyyy)	
Fiscal Year:	2016 <input type="text"/>	
Contract No (if known):	<input type="text"/>	
SWIFT Vendor # (if known):	<input type="text"/>	
Agency/Division:	G02_Financial Mgmt And Rptg	
Ship To:	Financial Mgmt & Reporting <input type="text"/>	
Bill To:	Financial Mgmt & Reporting <input type="text"/>	
Multiple Ship To Addresses?	No	
Price Obtained by:	Phone Quote <input type="text"/> (If obtaining a quote, remember the cost for shipping must also be quoted unless shipping is prohibited by the contract)	
Supervisor Approver:	Douglas, Rachel - rachel.douglas@state. <input type="text"/>	

1. Funding Type: Select appropriate option – If select Percent, click **Update** to save.
  2. Click on **Add Funding** link to enter EIOR funding information.
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## Enter Funding information

Fin_DeptID/ApproprID/Fund:*	G0231020.G027101-1000 Financial Mgmt & Reporting <input type="checkbox"/> Make This My Default
Dollars:*	499.00
Budget Fiscal Year:*	2016
Account Code:	<input type="text"/>
Agency Cost 1:	<input type="text"/> (5 digit code)
Agency Cost 2:	<input type="text"/> (5 digit code)
PC Business Unit:	<input type="text"/> (5 digit code)
Project Code:	<input type="text"/> (15 digit code)
Activity:	<input type="text"/> (15 digit code)
Source Type:	None

1. Fin\_DeptID/ApproprID/Fund: Select appropriate accounting string
2. Dollars: Enter EIOR total amount or percentage. Enter an amount or percentage for selected funding string
3. Budget Fiscal Year: Select appropriate Budget Fiscal Year (BFY)
4. Account Code: Enter account code if known
5. Agency Cost 1: Enter if applicable
6. Agency Cost 2: Enter if applicable
7. PC Business Unit: Enter if applicable
8. Project Code: Enter if applicable
9. Activity: Enter if applicable
10. Source Type: Select appropriate option if applicable

Click on **Submit** to save funding information and proceed with EIOR.

Click on **Add Funding**, then repeat Steps 1 through 10 if there are additional funding strings.

## Enter Item Information - Click on **Add Items** to enter EIOR details:

Items	Unit	SWIFT Cat.:	SWIFT Acct.:	Description:	Est Unit Cost:
<a href="#">Add Items</a>					
<p><a href="#">Show 0 Qty</a></p>					
<p><b>Buying Information</b></p> <p>Shipping/Freight Total: <input type="text"/></p> <p>Tax Total: <input type="text"/></p> <p>Credit Card/Purchasing Card Used: <input type="text" value="No"/></p>					
<p><b>Vendor</b></p> <p>Targeted Vendor Contacted:*</p> <p>Select One <input type="text"/></p> <p>Targeted Vendor Selected:*</p> <p>Select One <input type="text"/></p> <p>Suggested Vendor:*</p> <p><input type="text"/></p> <p>HTML Link/Other:</p> <p><input type="text"/></p> <p>Contact Person:</p> <p><input type="text"/></p> <p>Phone: <input type="text"/> Fax: <input type="text"/></p> <p>Street Address:</p> <p><input type="text"/></p> <p>City: <input type="text"/> State: <input type="text"/> Zip: <input type="text"/></p>			<p><b>Ship to:</b></p> <p>Requestor's Phone:*</p> <p>Example: 651-000-0000 (extension if applicable)</p> <p>NOTE: This field will not accept upper or lower case letters (numbers only)</p> <p><input type="text"/> <input type="checkbox"/> Make This My Default</p> <p>Street Address:</p> <p>309 Administration Bldg 50 Sherburne Ave</p> <p>City: <input type="text"/> State: <input type="text"/> Zip: <input type="text"/></p> <p>St Paul MN 55155</p>		
<p>Notes: <a href="#">Add Notes</a></p> <p><input type="button" value="Update"/></p>					

Amount, dollar or percentage must match item total.

## Enter EIOR Item Details:

EIOR ID: 7846									
Type of Purchase: Goods									
Fin Dept/Appr/Fund	Acct Code	Cost 1	Cost 2	PCBU	Project	Activity	Source	Amt	FY
G0231020/G027101/1000							None	\$499.00	16
Financial Mgmt & Reporting									\$499.00

Quantity: \* 1

Unit: \* each

Part No:

Complete Description: Model#/ Catalog#/ Stock# etc.....\*

HP Color Printer

HTML Link:

SWIFT Category #:

SWIFT Account #:

MSDS on File: N/A

Quote No:

Capital Asset?: No

Capital Asset ID:

Sensitive Item?: No

Master Lease Purchase?: No

Est. Unit Cost: \* 499.00

Notes:

1. Quantity: Enter quantity
2. Unit: Select appropriate option
3. Part No: Enter if applicable
4. Complete Description: Enter a detailed description of item(s)
5. HTML Link: Enter if applicable
6. Swift Category #: Enter category number if known
7. SWIFT Account #: Enter account code if known
8. MSDS on File: Select appropriate option if applicable
9. Quote No: Enter if applicable
10. Capital Asset: Select appropriate option if applicable
11. Capital Asset ID: Enter asset ID if known or applicable
12. Sensitive Item: Select appropriate option if applicable
13. Master Lease Purchase: Select appropriate option if applicable
14. Est. Unit Cost: Enter total cost for item based on quantity and cost
15. Notes: Enter if applicable

Click on **Submit** to save and proceed with creation of the EIOR or **Cancel** to delete data entered and return to previous section on the EIOR.

Click on **Add Items**, then repeat Steps 1 through 15 as necessary for additional items.

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<b>Buying Information</b>		
Shipping/Freight Total:	<input type="text"/>	
Tax Total:	<input type="text"/>	
Credit Card/Purchasing Card Used:	No	▼
<b>Vendor</b>		<b>Ship to:</b>
Targeted Vendor Contacted:*	Targeted Vendor Selected:*	Requestor's Phone:*
Yes ▼	No ▼	Example: 651-000-0000 (extension if applicable)
Suggested Vendor:*		NOTE: This field will not accept upper or lower case letter
Inovation		<input type="text" value="651-111-1111"/> x <input type="checkbox"/> Make This My Default
HTML Link/Other:		Street Address:
<input type="text"/>		309 Administration Bldg 50 Sherburne Ave
Contact Person:		City: State: Zip:
<input type="text"/>		St Paul MN 55155
Phone:	Fax:	
<input type="text"/>	<input type="text"/>	
Street Address:		
<input type="text"/>		
City:	State:	Zip:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes: <a href="#">Add Notes</a>		
Update Finish and Send		

### Buying Information Section:

1. Shipping/Freight Total: Enter if applicable
2. Tax Total: Enter appropriate amount if Direct Pay Permit is not applicable and sales tax must be paid to vendor
3. Credit Card/Purchasing Card Used: Select appropriate option, if applicable

### Vendor Section:

1. Targeted Vendor Contacted: Select appropriate option
2. Targeted Vendor Selected: Select appropriate option
3. Suggested Vendors: Enter a recommended Vendor Name
4. HTML Link/Other: Enter website link or other data, if applicable
5. Contact Person: Enter if applicable
6. Phone: Enter if applicable
7. Fax: Enter if applicable
8. Street Address: Enter if known
9. City: Enter if known
10. State: Enter if known
11. Zip: Enter if known

### Ship to Section:

1. Requestors Phone: Enter appropriate telephone number

Click **Update** to save and **Finish and Send** to submit the EIOR for supervisor approval and processing.

To review the submitted EIOR and status, the Requester can click on the **My EIOR** link. Click on the EIOR ID in the **Submitted EIORs** section.

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**EIOR**  
(Training)

<b>Submitted EIORs</b>			
<u>EIOR ID</u>	<u>Title</u>	<u>Date Created</u>	<u>Type</u>
<a href="#">7846</a>	Printer	6/7/2016 4:34:27 PM	Goods

The Work Flow section located on the right side of the EIOR will display the Approvals required and status. As the EIOR is updated and approved the date and status will be populated with the current date, timestamp, and comments.

Created By Name: <a href="#">Rachel Douglas</a> Date: 6/7/2016 4:34 PM Comments: Need ASAP
Supervisor Approver: Sub: <a href="#">Rachel Douglas</a> Actual: Date: Comments:
Second Level Approver: Sub: <a href="#">Micah Intermill</a> Actual: Date: Comments:
Funding Approval G0231020/G027101/1000 Sub: <a href="#">Bruce Lemke</a> Actual: \$499.00 Date: Comments:
Buyer Sub: FMR Actual: Date: Status: Comments: PO #: