



eRequisition Submission Form - Instructions

Overview

This eRequisition Form will assist State Entity and State Purchasing buyers/contract professionals in tracking all required documents as part of the requisition packages. The form is essentially a checklist that organizes all the necessary information and documents required to submit a requisition.

The eRequisition form is provided in two formats—MS Outlook and MS Word. If you use the MS Outlook format, the form is created as part of an email message that you complete and send. If you use another email application, then you complete the MS Word form and then attach it to an email that you create.

For instructions on using the eReq form, please click the format that you want to use below:

[Using the MS Word Form](#)

[Using the MS Outlook Form](#)

Note: If you have any difficulties, please email or call DOAS at e-communications@doas.ga.gov or 404-657-6000.

Instructions for ERequisition Submission Form in MS Word Format

Instructions for Using MS Word Format

- (1) Open the eReq Word Form in MS Word. It should look like this [screen shot](#).
- (2) Select Save As (under File), Change the file type to document template and save the file with the name “eRequisition Submission Form”

Note: You will only need to follow steps 1 & 2 for the first use. For subsequent uses, follow instructions 3-7 below.

- (3) Create a new document
 - a. Under File, choose **New**
 - b. Under Templates, choose **On my computer**
 - c. Select the eRequisition Submission Form
- (4) Begin completing the document for your requisition
- (5) Complete the five sections:
 - a. Type of Requisition
 - i. Use arrow to open drop down menu to choose correct solicitation
 - b. Type of Product/Service Category
 - i. Use arrow to open drop down menu to choose correct category
 - c. Brief description of solicitation
 - i. Use text box to describe purpose of solicitation
 - d. Document type, method of submission and document name
 - i. For each type of document (Requisition, specification, etc)
 1. Click on the appropriate check-box indicating the method of submission-Sent through PeopleSoft or this Outlook form
 - ii. In the text box area, list the name of the document for each document type submitted (i.e. Specification.doc)
 - e. Check that all documents were submitted
 - i. Click on Yes or No to indicate whether all documents have been submitted or not (including those attached to this email message)
 - ii. If all documents have **not** been submitted, please provide:
 1. Document type (Requisition, Specification, etc)
 2. Intended method of submission (PeopleSoft or Word form)
 3. Document name, and
 4. Reason why the document was not submitted in the large text box provided.

Instructions for ERequisition Submission Form in MS Word Format

- (6) Save the document with an appropriate name indicating identifying information. For example, if you are with DOAS and submitting a requisition for office supplies, a file name might be **DOAS_OfficeSupp2006**.
- (7) Attach to an email message and send to the intended DOAS Acquisition Manager.

MS Word Format Screen Shot

eRequisition Submission Form

Please select type of requisition (drop down menu) **a** Please select product/service category (drop down menu) **b** Please provide a brief description of requested product/service **c**

RFQ **Goods and Supplies** []

Supporting Documents **d**

Please submit all required documents, indicating the method of submission by clicking the appropriate check boxes and providing the file name, if document will be sent with this form.

Requisition:	<input type="checkbox"/> Submitted through PeopleSoft <input type="checkbox"/> Submitted as an attachment to this Word form	If the Requisition is submitted with the Word form, please type in name of attached file	[]
Specification:	<input type="checkbox"/> Submitted through PeopleSoft <input type="checkbox"/> Submitted as an attachment to this Word form	If the Specification is submitted with the Word form, please type in name of attached file	[]
Drawing plans:	<input type="checkbox"/> Submitted through PeopleSoft <input type="checkbox"/> Submitted as an attachment to this Word form	If the Drawing plans are submitted with the Word form, please type in name of attached file	[]
Sole source/ brand justification:	<input type="checkbox"/> Submitted through PeopleSoft <input type="checkbox"/> Submitted as an attachment to this Word form	If Sole source/brand justification is submitted with the Word form, please type in name of attached file	[]
Other (If needed):	<input type="checkbox"/> Submitted through PeopleSoft <input type="checkbox"/> Submitted as an attachment to this Word form	If any other files are submitted with the Word form, please indicate the type of document and name of attached files(s)	[]

Are all required documents submitted? **No** **e**
(Either through PeopleSoft or with this form) **Note: An incomplete requisition package will not be processed**

If the answer above is No, for documents not submitted please provide in the box below:
1) Document type 2) Intended method of submission 3) Document name and 4) Reasons for not submitting document

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Instructions for ERequisition Submission Form in MS Outlook Form

Instructions for MS Outlook Users

Section A. Installing the Outlook Form

- (1) Click on the attachment entitled **eReq Outlook Form.oft**
- (2) Please save the attachment to your desktop
- (3) Go to your desktop
 - a. Open EReq Outlook Form.oft
 - 1) If you see two tabs labeled Message & Requisition Submission Checklist, please continue to the next section Using the Outlook Requisition Form
 - 2) If you just see one tab, close the Outlook form and see the [Appendix](#) on how to publish the form on your computer.

Note: You will only have to install the Outlook Form once. For subsequent uses, the Form can be found on your computer desktop.

Section B. Using the Outlook Requisition Form

- (1) To open the form (If the Form is already open, skip to step 2):
- (2) Go to your Desktop, Open **eReq Outlook Form.oft** (The new window entitled Requisition Submission should look like this [screenshot.](#))
- (3) To use the email message, select Message tab:
 - a. Please write an email message for the intended DOAS Acquisition Manager.
 - b. Attach all documents to be sent to DOAS.
- (4) To use the checklist, select the Requisition Submission tab. Ensure that the scroll bar on the right side is moved to the top. To complete the form, you will complete five sections: (Click here to see a [screenshot.](#))
 - a. Type of Requisition
 - i. Use arrow to open drop down menu to choose correct solicitation
 - b. Type of Product/Service Category
 - i. Use arrow to open drop down menu to choose correct category
 - c. Brief description of solicitation
 - i. Use text box to describe purpose of solicitation
 - d. Document type, method of submission and document name
 - i. For each type of document (Requisition, specification, etc)

Instructions for ERequisition Submission Form in MS Outlook Form

1. Click on the appropriate check-box indicating the method of submission-Sent through PeopleSoft or this Outlook form
 2. In the text box area, list the name of the document for each document type submitted (i.e. Specification.doc)
- e. Check if all documents were submitted
- i. Click on Yes or No to indicate whether all documents have been submitted (including those attached to this email message)
 - ii. If all documents have **not** been submitted, please provide the:
 1. Document type (Requisition, Specification, etc)
 2. Intended method of submission (PeopleSoft or Outlook form)
 3. Document name, and
 4. Reason why the document was submitted in the large text box provided.
- (5) Once the Message tab and the Requisition Submission Checklist tab have both been filled out, click on **Send** in the upper left-hand corner to send the Outlook email form

Instructions for ERequisition Submission Form in MS Outlook Form

MS Outlook Form Screenshot

Requisition submission Checklist

Please select type of requisition: RFQ (a)

Please select product/service category: Goods & Supplies (b)

Please provide a brief description of requested product/service (c)

Please submit all required documents and indicate submission of document by clicking the appropriate check boxes below (d)

Document Type	Submitted through PeopleSoft	Submitted as an attachment to this Outlook form	If submitted through Outlook form, please type in names of files attached
Requisition:	<input type="checkbox"/>	<input type="checkbox"/>	
Specification:	<input type="checkbox"/>	<input type="checkbox"/>	
Drawing plans:	<input type="checkbox"/>	<input type="checkbox"/>	
Sole source /brand justification:	<input type="checkbox"/>	<input type="checkbox"/>	
Other (If needed):	<input type="checkbox"/>	<input type="checkbox"/>	

Please answer the following question (e)

Are all required documents submitted? (Either through PeopleSoft or Outlook form) YES NO

Note: Incomplete requisition package will not be processed

If the answer above is NO, for documents not submitted please provide in the box below:
1) Document type 2) Intended method of submission 3) Document name and 4) Reasons for not submitting document

APPENDIX

Publishing MS Outlook Form

- (1) Return to the main Outlook window
- (2) In the menu bar, Go to Tools -> Forms -> Design a form
- (3) In Look in, select User Template in file system
- (4) Click Browse and select your desktop-Click OK once desktop is selected
- (5) Select eReq Outlook Form.oft and click open
- (6) This will open the form in design mode (the window should be entitled Requisition Submission.)
- (7) Go to Tools -> Forms -> Publish form

A new window entitled Publish Form As will appear,

- a. In the Display name field, replace Untitled with Requisition Submission
- b. Select Publish.
- c. Close the window entitled Requisition Submission.

(Note: You will be asked to save the changes. Select "No".)

- (8) Go back to your desktop, and click on the eReq Outlook Form- You should now see two tabs, one titled Message, and one titled Requisition submission checklist.

Note: You will only need to publish the form once. For subsequent uses, the Outlook Form can be found on your computer desktop. For instructions on using the Form, go to page 4 [Section B.](#)