Creating a Requisition

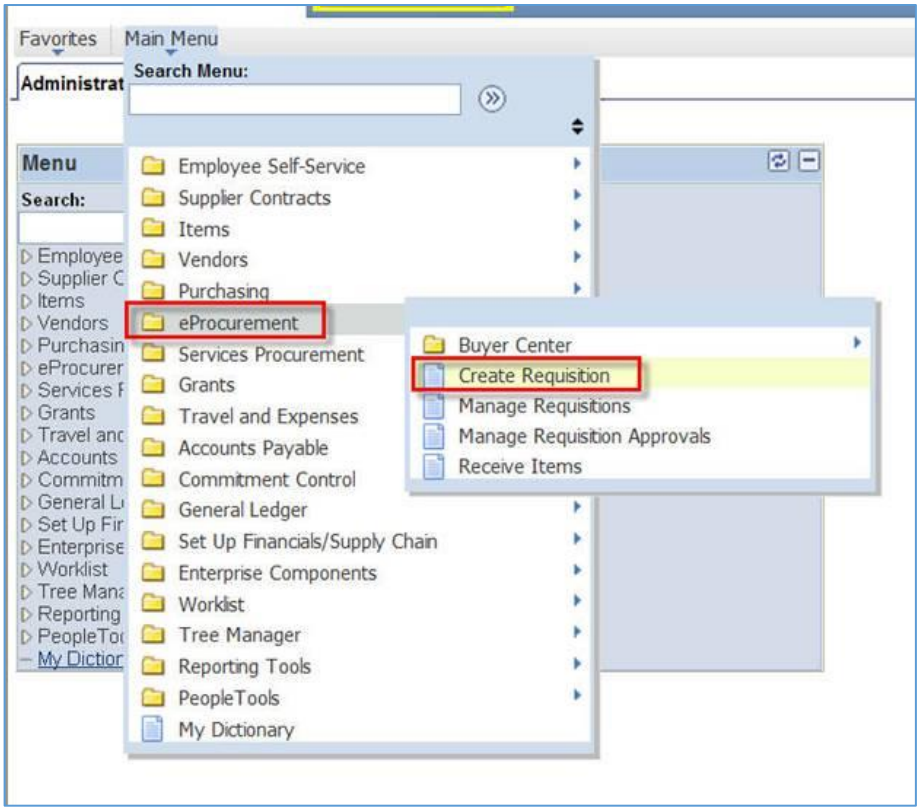
- OVERVIEW (Please note that functions listed in the menu examples may vary according to the permissions of each requestor. Some Requesters may have many functions available to them and other Requesters may have fewer).
- 1) DEFINE REQUISITION tab
- 2) ADDING ITEMS AND SERVICES tab
- 3) REVIEW & SUBMIT tab: Reviewing your line items
- 4) REVIEW & SUBMIT tab: Budget Checking & Submitting your Requisition
- OPTIONAL: HELPFUL AIDS

OVERVIEW (Please note that functions listed in the menu examples may vary according to the permissions of each requestor. Some Requesters may have many functions available to them and other Requesters may have fewer).

Creating a requisition is done by Department Requestors to order goods and services. A requisition goes through approval processes based on amount and items ordered. After the requisition is approved it is sourced (dispatched) into a Purchase Order then sent to the appropriate vendor.

This training document will explain how to complete the three main actions to create requisitions:
1. Define the Requisition
2. Add Items and Services
3. Review and Submit the Requisition

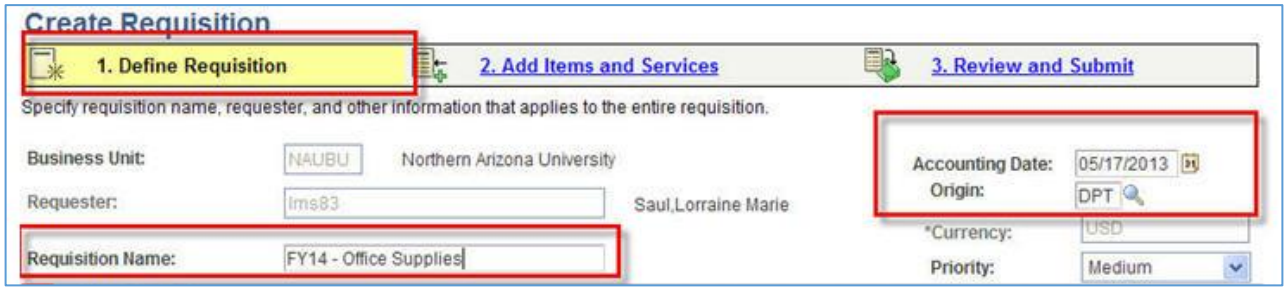
To access the "Create Requisition" screen: Main Menu>eProcurement>Create Requisition



1) DEFINE REQUISITION tab
Enter Basic Information

NOTE: Any field descriptions that are preceded by an asterix (*) are mandatory and need to be completed. Fields that auto-populate are shown in grey and are unalterable. The 3 other remaining fields that allow data entry: ***(NOTE: Priority: Buyers do not put the Requisition in any ranking order. Determining the urgency of the Requisition is not applicable)***

- **Accounting Date:** Defaults to current date. (It is only necessary to change the date during Fiscal year end processing and when entering change requests.)
- **Origin:** Defaults to DPT (select the appropriate Origin for your Requisition by clicking on the)
  - DPT is used for Departmental PO's (Purchases totaling under $5,000 and unrestricted catalog--IE sole source, sponsored grants. When selecting DPT origin, it will auto source to a PO.)
  - PUR for any Purchases that require Purchasing Services Oversight (Purchases over $5,000 -- PUR origin selection will be sourced and the PO is created by purchasing services.)
- **Requisition Name:** It is recommended you come up with a naming convention which will assist you when recalling your requisition. (IE: items for what project--Example: Office Supplies-John Doe Project

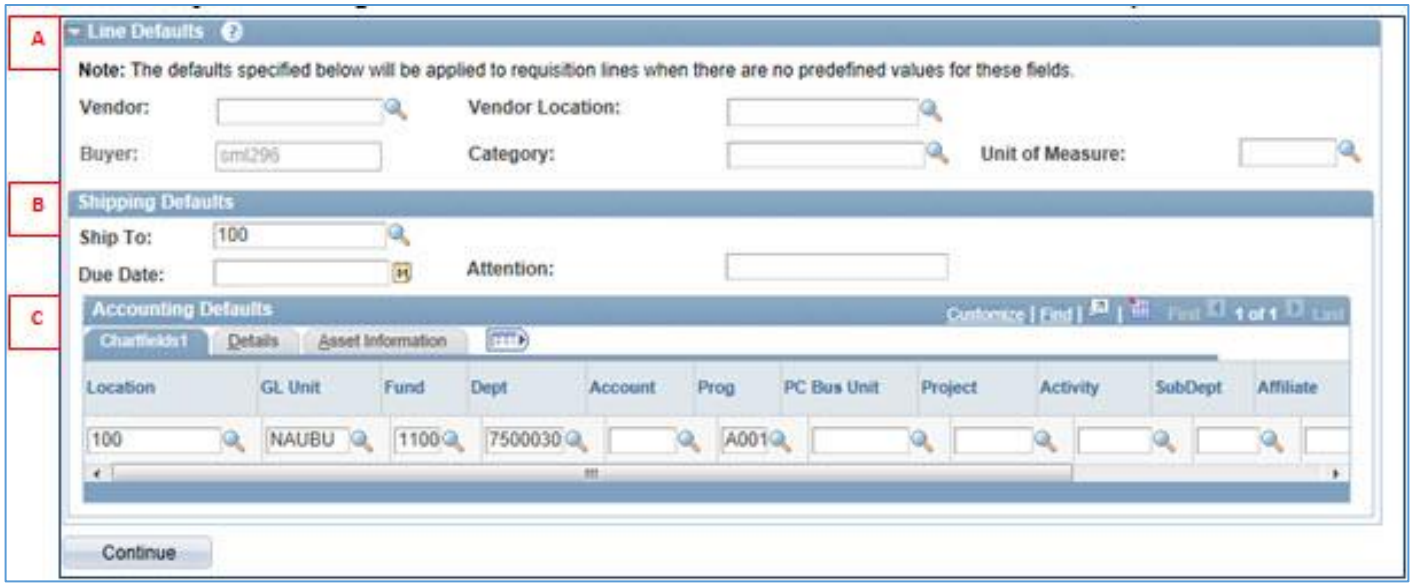


"Line Defaults" Icon Bar

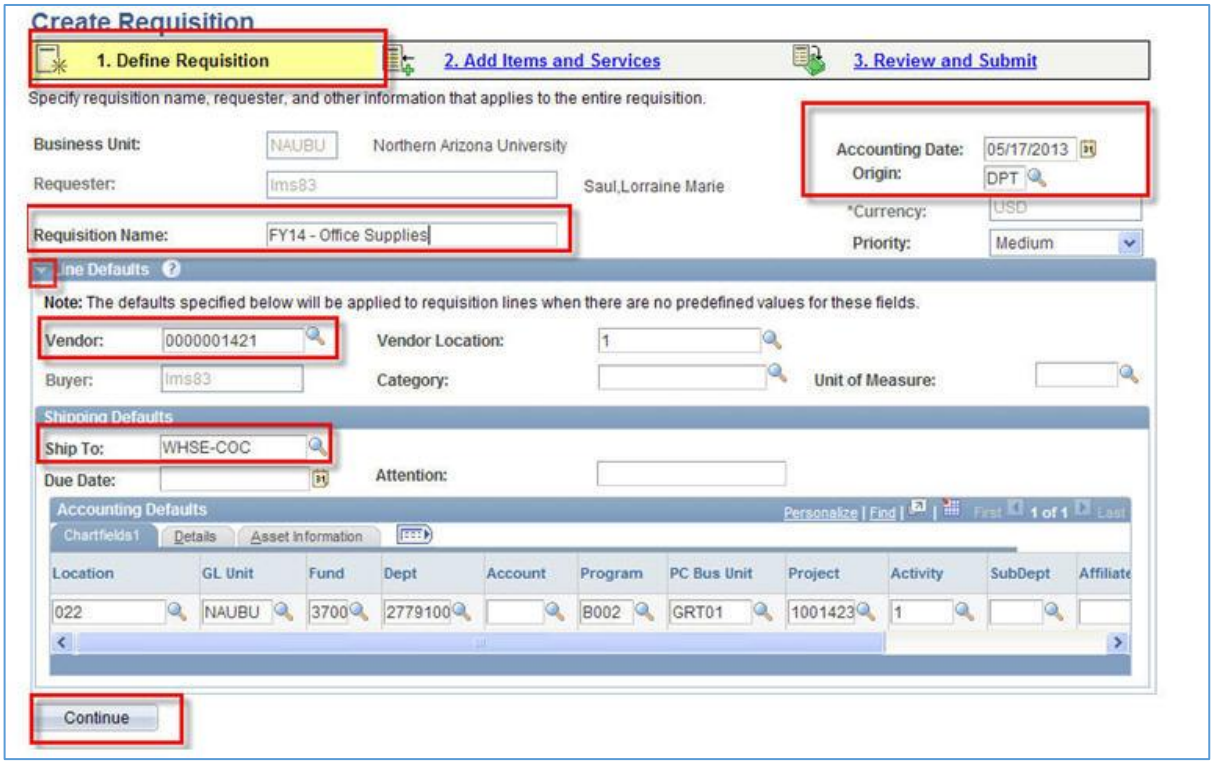
If the "Line Defaults" bar is in the collapse mode, click on the "expand" icon to open it up for your default information. When you enter information in this area, the information will auto-populate for each line you create in the requisition.

"Line default" expands to 3 different sections:

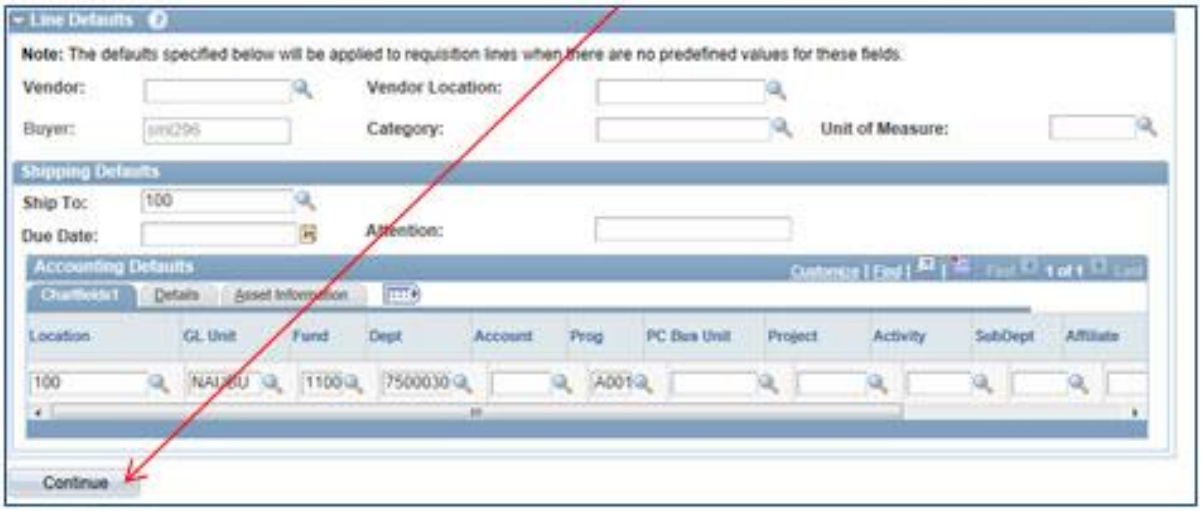
- Vendor information
- Shipping information
- Accounting information



A: VENDOR DEFAULT SECTION VENDOR: Select your vendor (note: 1 vendor per requisition) VENDOR LOCATION: A Vendor may have multiple locations--be sure to select the correct one CATEGORY: (optional) You may select when you are completing the lines UNIT OF MEASURE: (optional) You may select when you are completing the line item
B: SHIPPING DEFAULT SECTION : Select the address the merchandise is to be delivered
C: ACCOUNTING DEFAULT SECTION (Ignore--> you will select/modify at the "Review & Submit" menu) **HERE IS AN OVERVIEW OF HOW YOUR COMPLETED SCREEN WILL LOOK:**

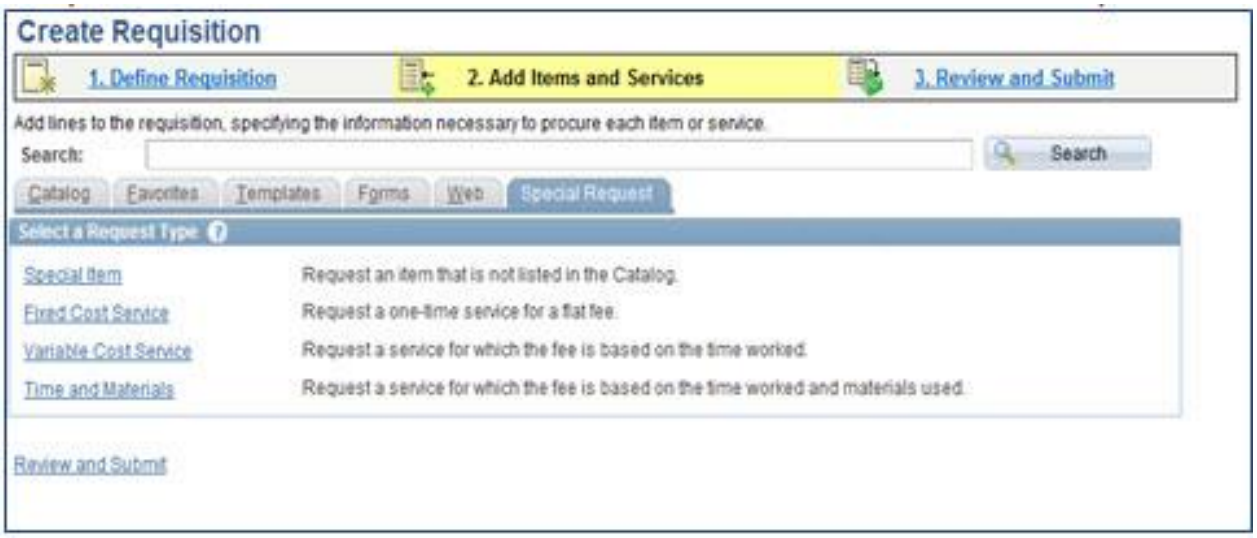


You are now ready to click the "CONTINUE" button to add your line items



2) ADDING ITEMS AND SERVICES tab

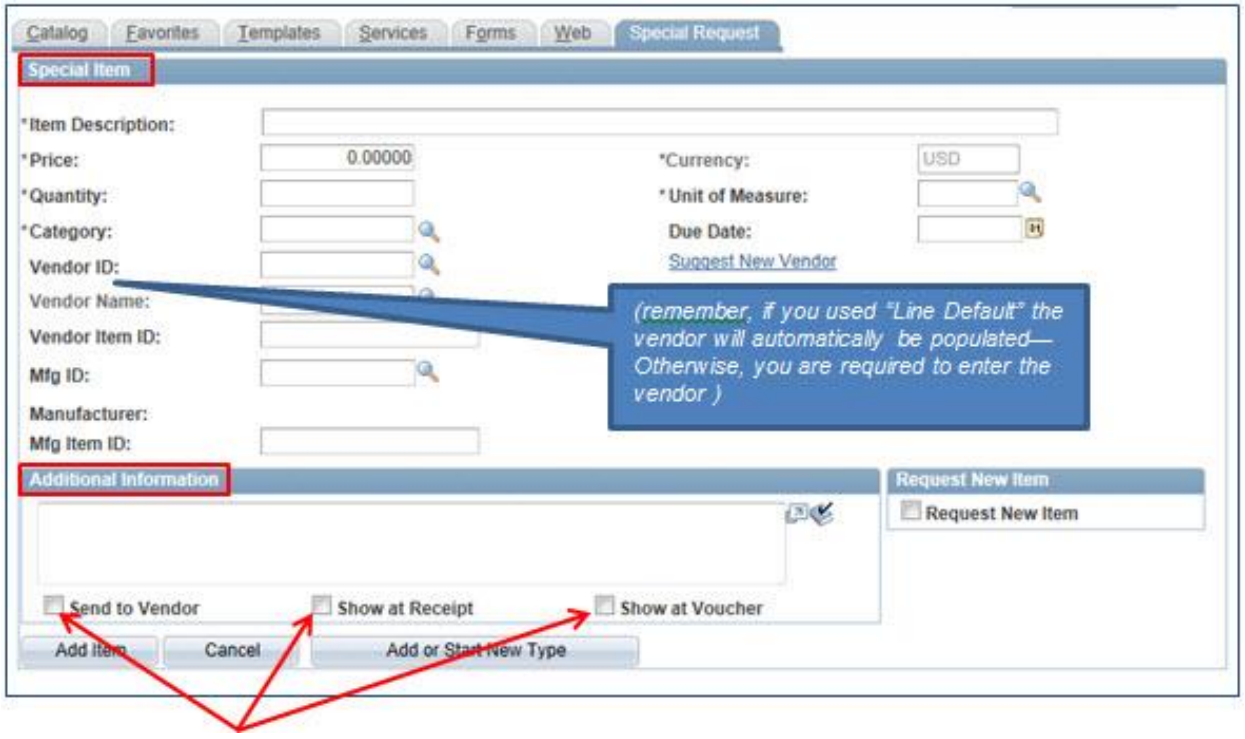
Once you click the "Continue" button, the following screen will appear.



- Select "Special Request" tab
- Select "Special Item" option

- You are now at the screen which you will add the items you are requesting to purchase. You will need to describe:
  - Your item specifics and costs
  - Additional Information *(if any)*

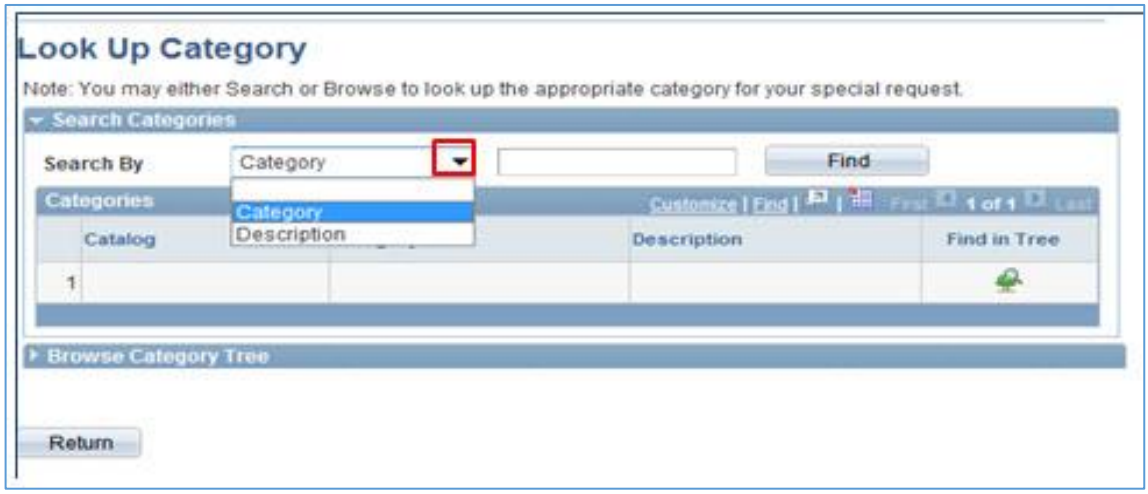
Note: Any time you see the "magnifying glass", you can click and get options from which to select



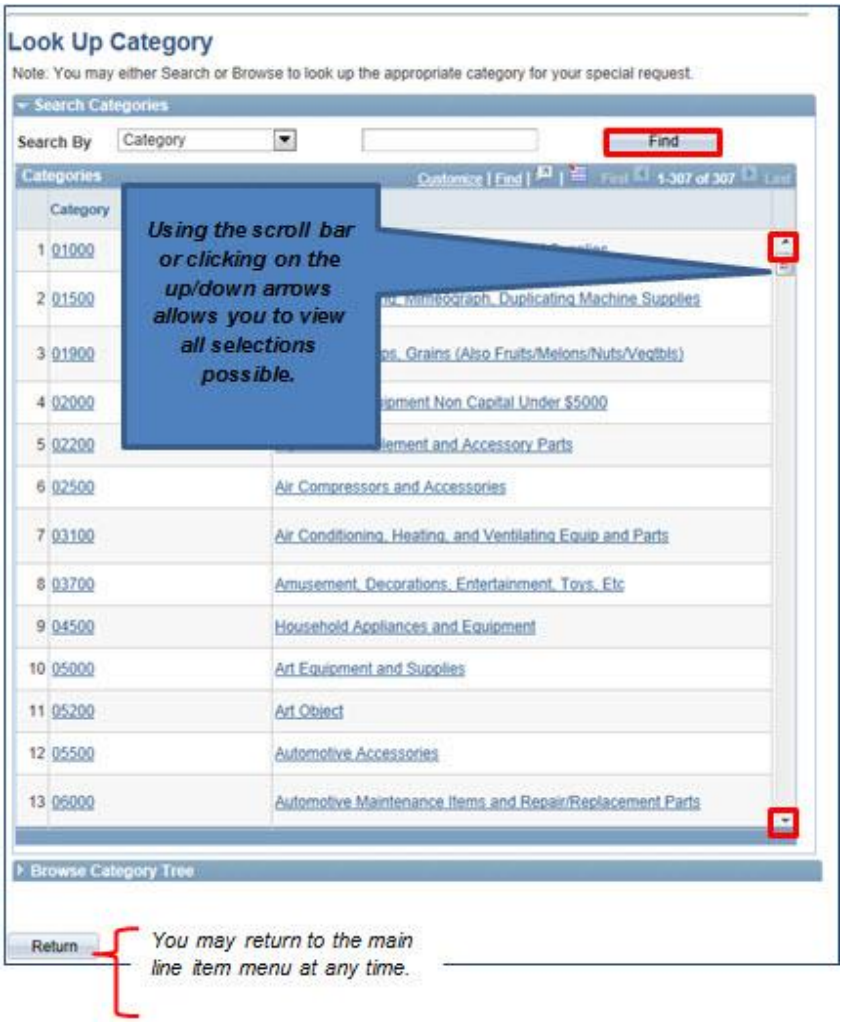
When you place a check mark on these boxes, this indicates that your "additional information" will be printed in those areas—if unchecked, your "additional information" is view only.

- **Item Description**: A complete description of the item being ordered. Include the vendor item number if known. (This will be shown on the PO for the vendor-- be complete as possible.)
- **Price:** Price per unit
- **Quantity:** Amount of item being ordered
- **Unit of Measure:** Unit the item is measured by, such as EA (Each), BOX, DOZ (Dozen).
- **Category:** Fill in the appropriate ID of the item category ***(NOTE: the expense code is automatically assigned to the category code. Be sure to line out your items if you have multiple expense codes.)***
  - Click on the " 🔍 "
  - A "Lookup Category" box will appear

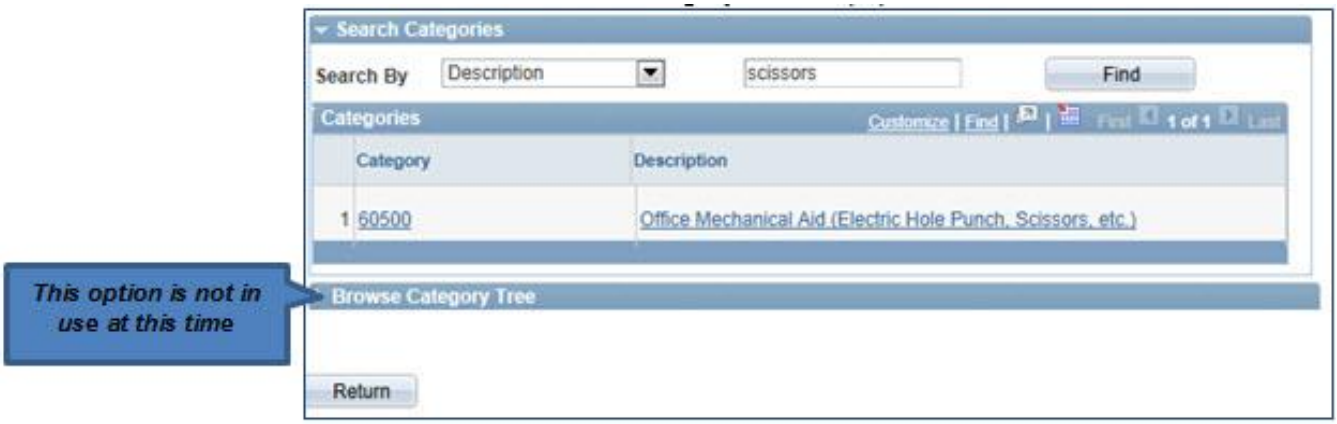
- You may search by Category OR Description



- If you click "Find" for either "category" or "description", a listing will appear from which you may choose.

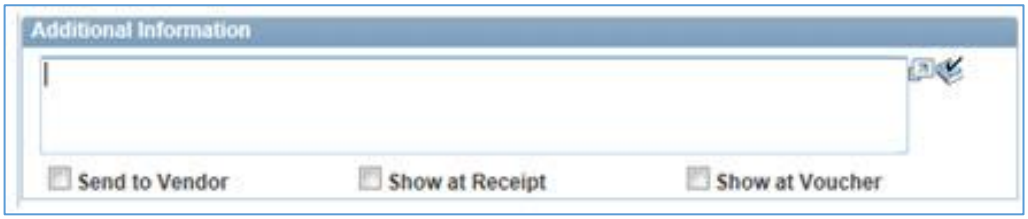


- To further narrow your search, you may Choose "Description"
  - Type in a brief description in the text box
  - Then "Enter" or use the "Find" button to select
  - Double Click on the appropriate category shown
  - That category will auto populate

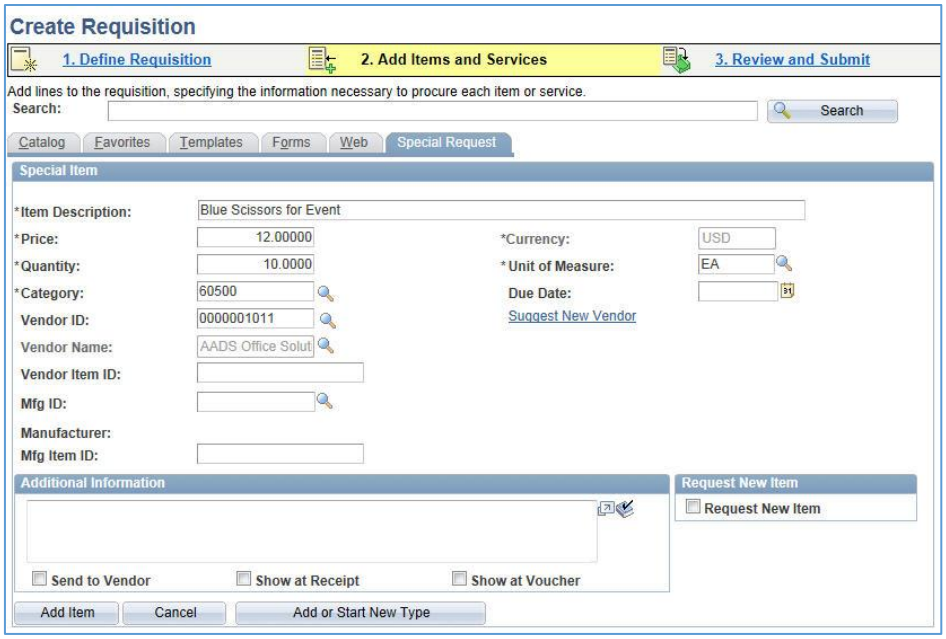


You will be returned to the main item screen to complete the remaining information

- ***Due Date:*** Indicates the date you would like to receive the item (no guarantees)
- ***Vendor ID:*** *This should default from the vendor chosen when "Line Default" was used when you completed the "Define Requisition" tab.*
- ***Suggest New Vendor:*** *Not applicable at this time*
- ***Additional Information:*** *Comments specific to this item can be made at this time. Check mark the boxes below to determine at what stage in the process the comments will be shown: Vendor PO, Receipt or Voucher Pymt. (If no box is checked the comment is strictly informational and only shown as view only on the Requisition).*



- Upon completing your line item, Click "Add Item" (*until you click the "* *" button, your entry is not recognized by the system)*



- **NOTE**: Your requisition should total all charges (including estimated taxes, freight charges, or any other misc. charges). View the summary box which appears in the upper right hand corner of the pagelet.

- You may continue to enter multiple items as needed.
- As you click the "Add Item" button, the Requisition Summary will continue to summarize your Requisition.
- When item entry is complete, you are now ready to proceed to the "Review and Submit" tab of your Requisition.

3) REVIEW & SUBMIT tab: Reviewing your line items

At this point, you will have entered all items and their associated general, accounting, and shipping information. The object of this screen is to allow you a final review of all items and information prior to submitting:

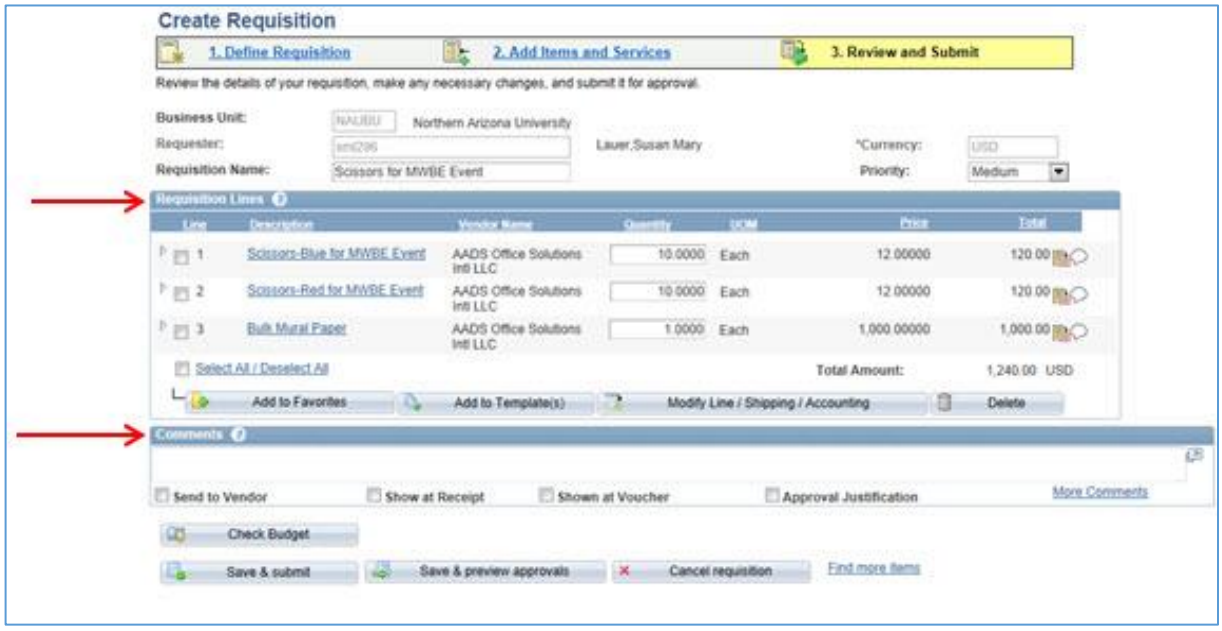
A) Validate all the items entered
B) Change your Chart Fields via a Speed Chart, if necessary ***(this is the only accepted method to make accounting changes)***
C) Change your line items to "amount only" type ***(this is necessary because you will need to receive against your line items by Amount and not by quantity)***
Once you click "Review and Submit", a screen(s) appears showing the listing of your line items:

Requisition Lines: It is here that you review:

- Speed Chart coding
- Change to an Amount Only line item
- Change Origin (DPT or PUR) at this point
- Enter Attention To: Enter Building No. and Room No. (i.e. Bldg. 25, Room 36)
- Enter individual line shipping comments and due dates

Comments: It is advised that you type in a reason for your purchase and check the "Approval Justification" box. This will be viewed by the approver and aid in determining whether to approve the Requisition or not.

- Don't forget to view the upper right screen for the Requisitions Summary of items and costs



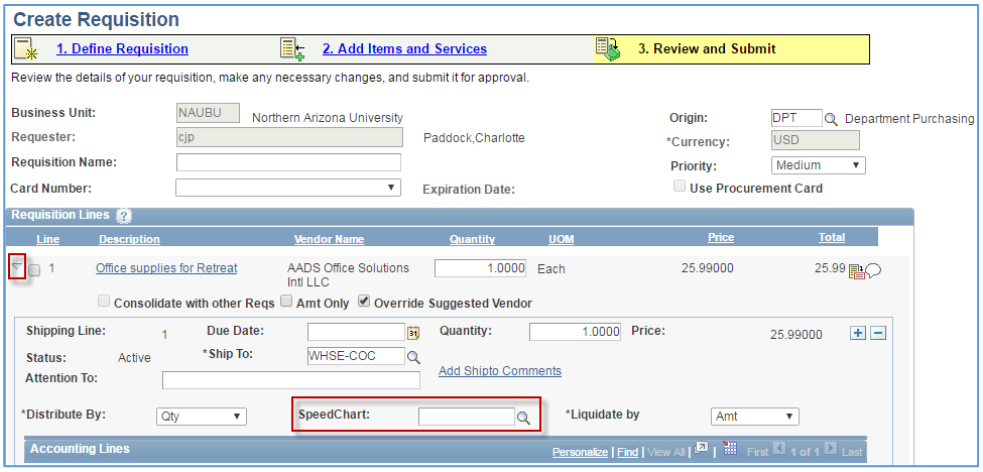
A) Validate all the items entered

- Click on the "collapse/expand" icon to the left of the line item box ( )
- This will expand the line item to display the "Accounting Lines"

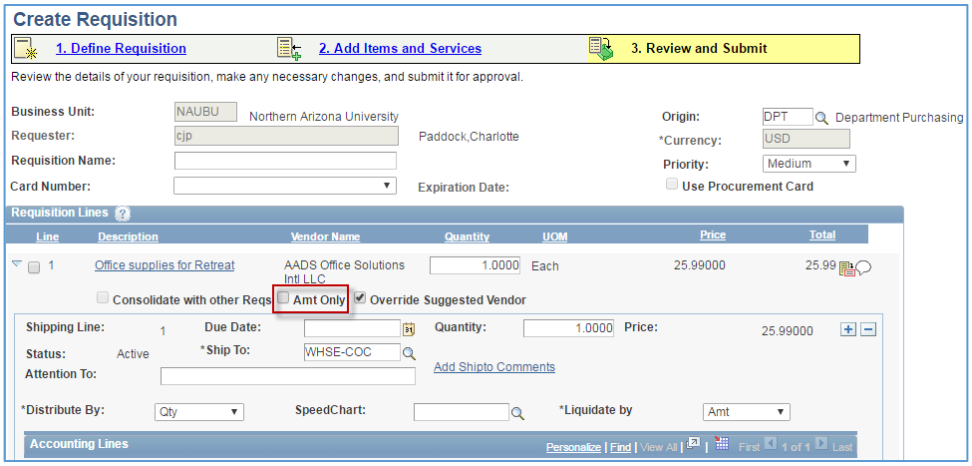
B) Change your Chart Fields via a Speed Chart

- Enter/Search for a different "SpeedChart" code if needed
- Once it is entered/selected, it will auto-populate all the necessary fields

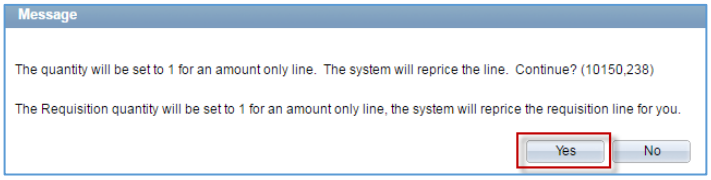
C) Change your line items to an "amount only" type



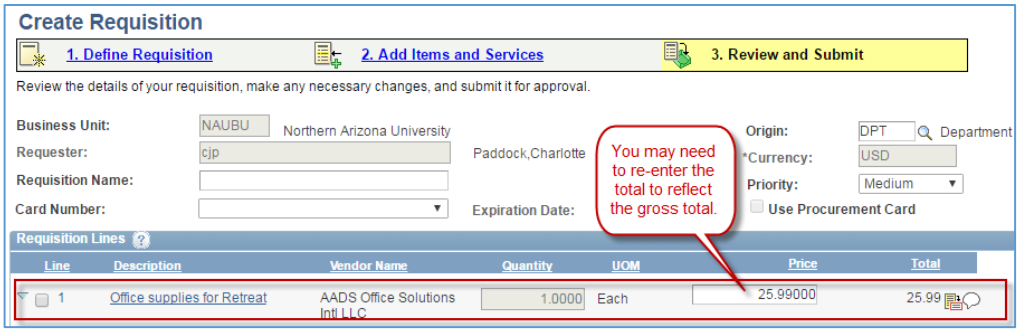
- When you click on the "Amount Only" icon, you will need to check mark the "Amt Only" box



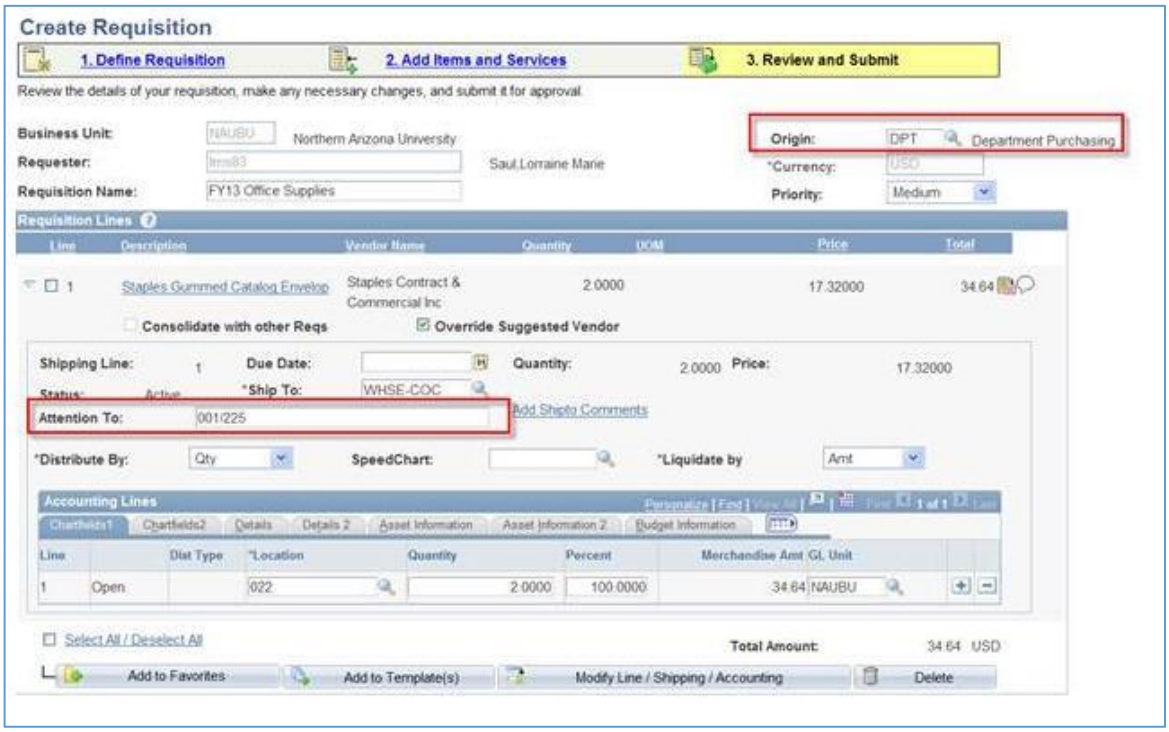
- A dialog box will appear letting you know:
  - Quantity for that line item will be changed to one (1)
  - The unit price will be overridden by a "grand total" amount
- Click the "Yes" button to continue



- Check your total, you may need to reenter the Amount as the grand total for the line



- Reviewing
  - **Origin:** Check to make sure that the "origin" is what you want--> you may now change this in this section if need be
  - **Attention to:** Enter the building and room number where goods/services are to be delivered. **IMPORTANT:** Use only this format: 001/229 (the 1rst 3 digits represent the building number/ the last 3 digits represent the room number....notice the below example) There MUST be 3 leading numerical characters for the building; thus, this example: building 098B would be 098B/Front Office.



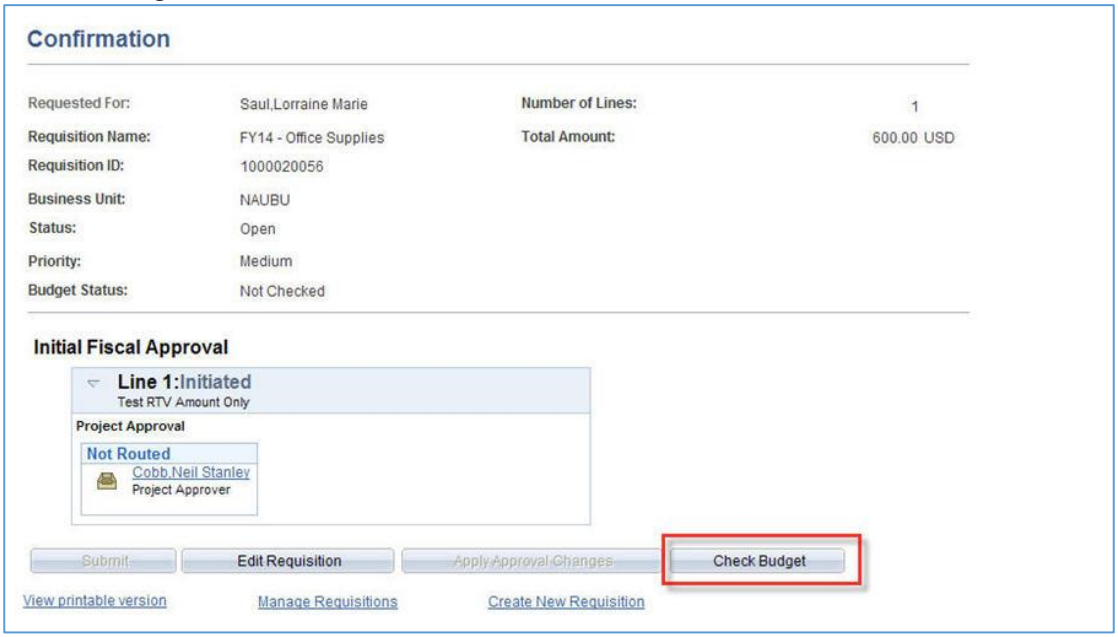
- You are now ready to "Save & Preview Approvals"
- Click the "Save & Preview approvals" button (this will show you who will be approving your Requisition)

4) REVIEW & SUBMIT tab: Budget Checking & Submitting your Requisition

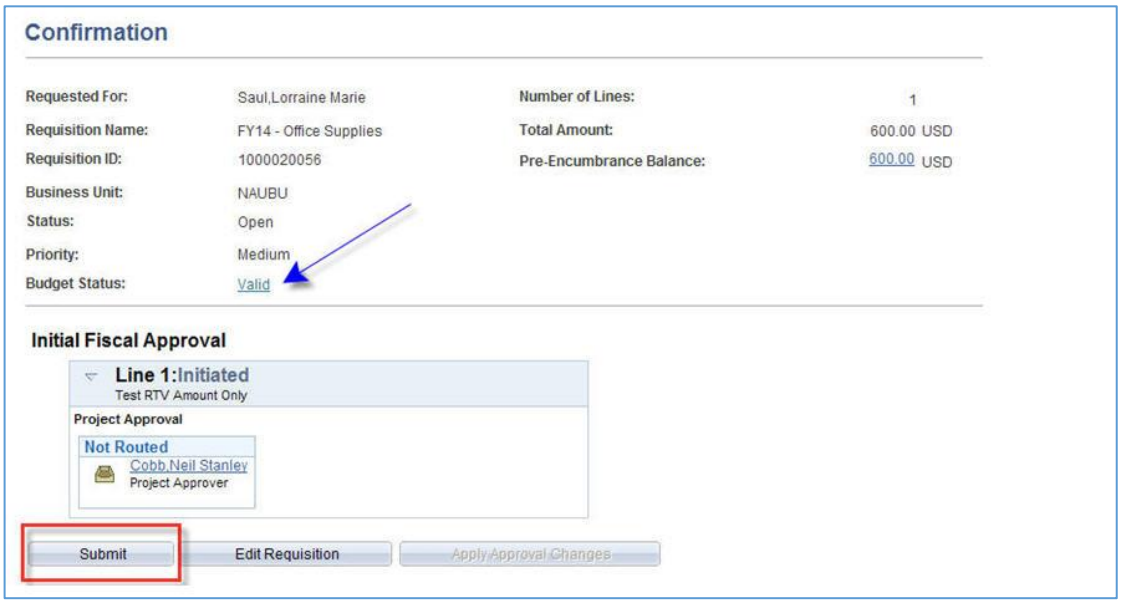
It is your responsibility to assure that all your line items pass the "Budget Check" process. It is necessary to "Check Budget" before the document is submitted for approval. (NOTE: The "Submit Button" will be available ONLY when the "Budget Check" status is "VALID")

- On the Approval Confirmation page, the "Check Budget" Button will now be available

- It is necessary to "Check Budget" BEFORE the document is SUBMITTED for approval
- Click the "Budget Check" Button

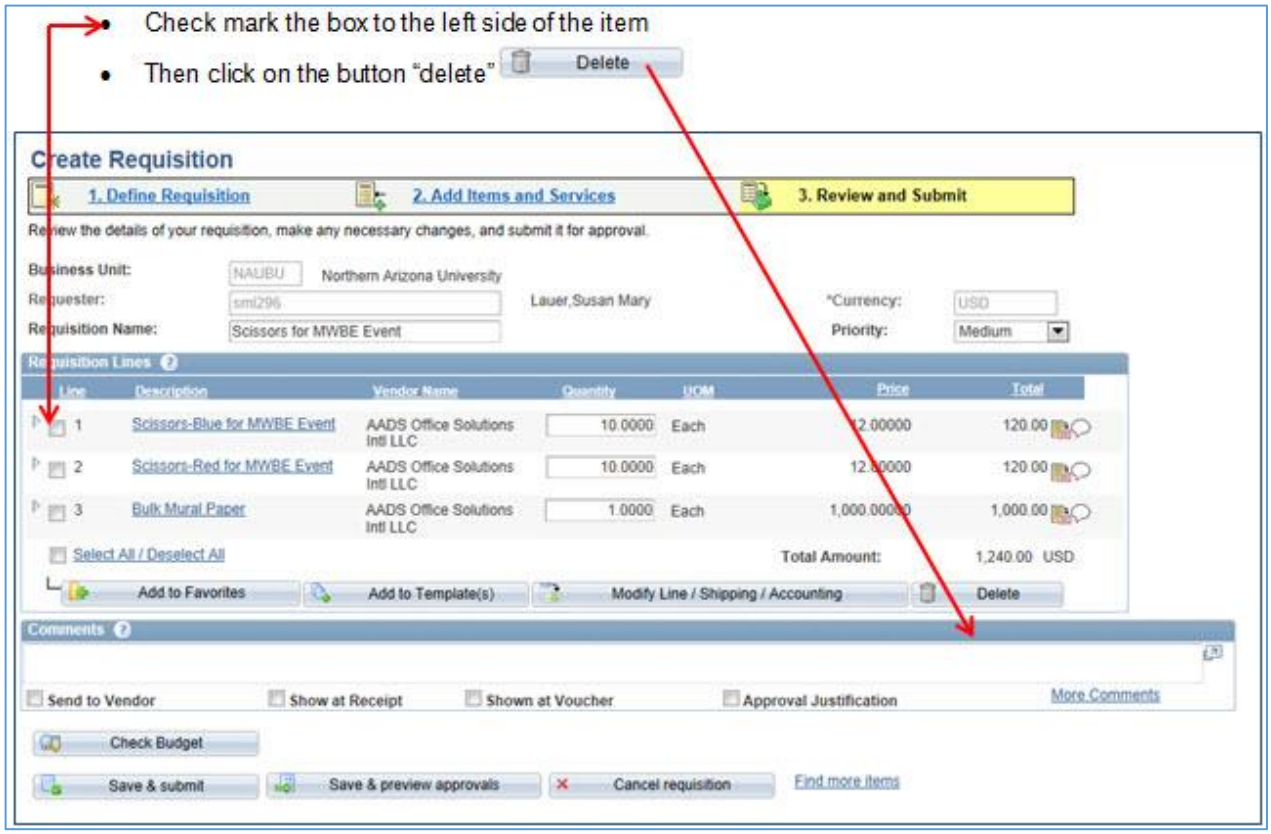


- The "Submit Button" will be available ONLY when the budget is VALID
- When "VALID" status is confirmed, you may click" SUBMIT"
- It is now in the Approver's que.



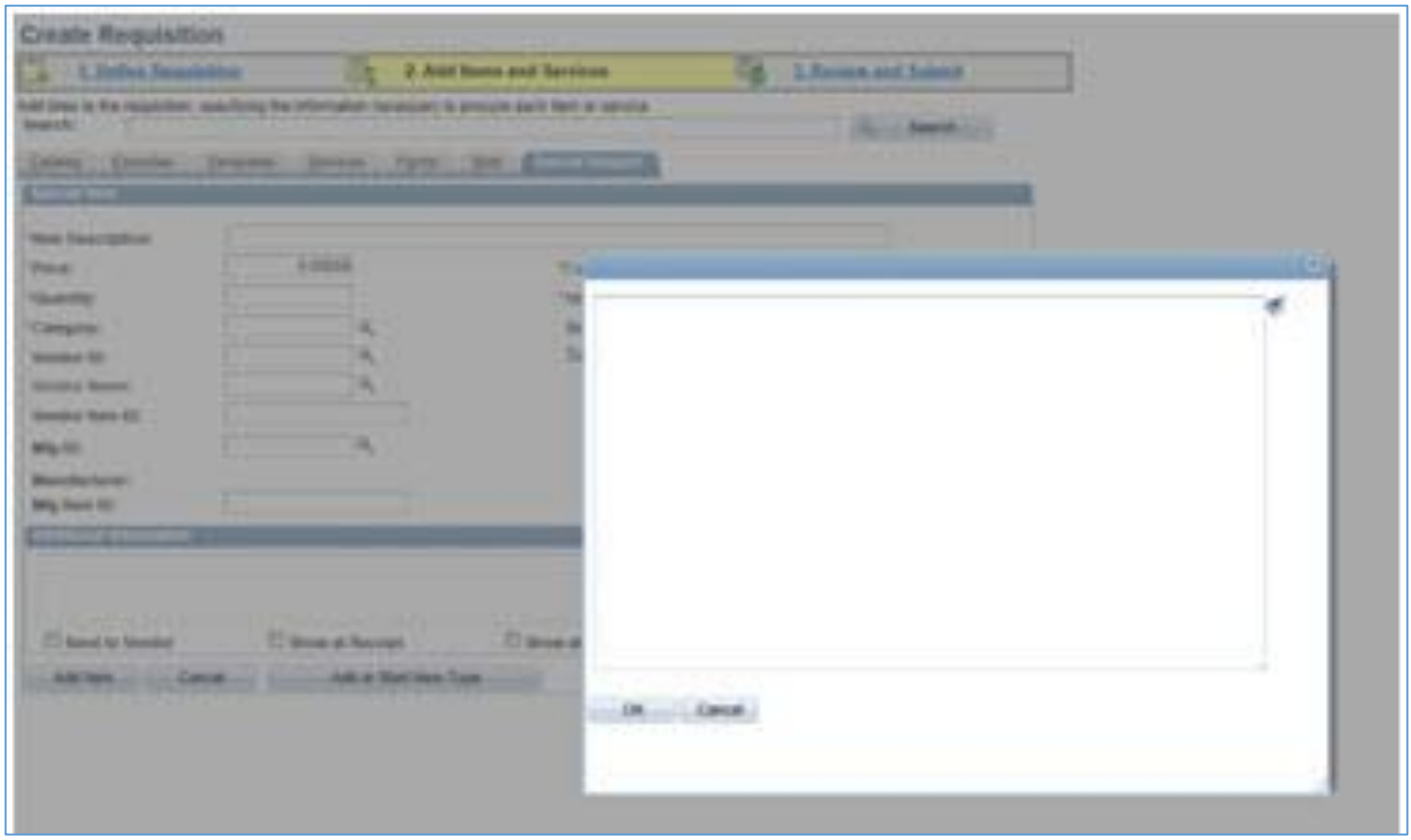
OPTIONAL: HELPFUL AIDS

OPTIONAL: Deleting a Line Item



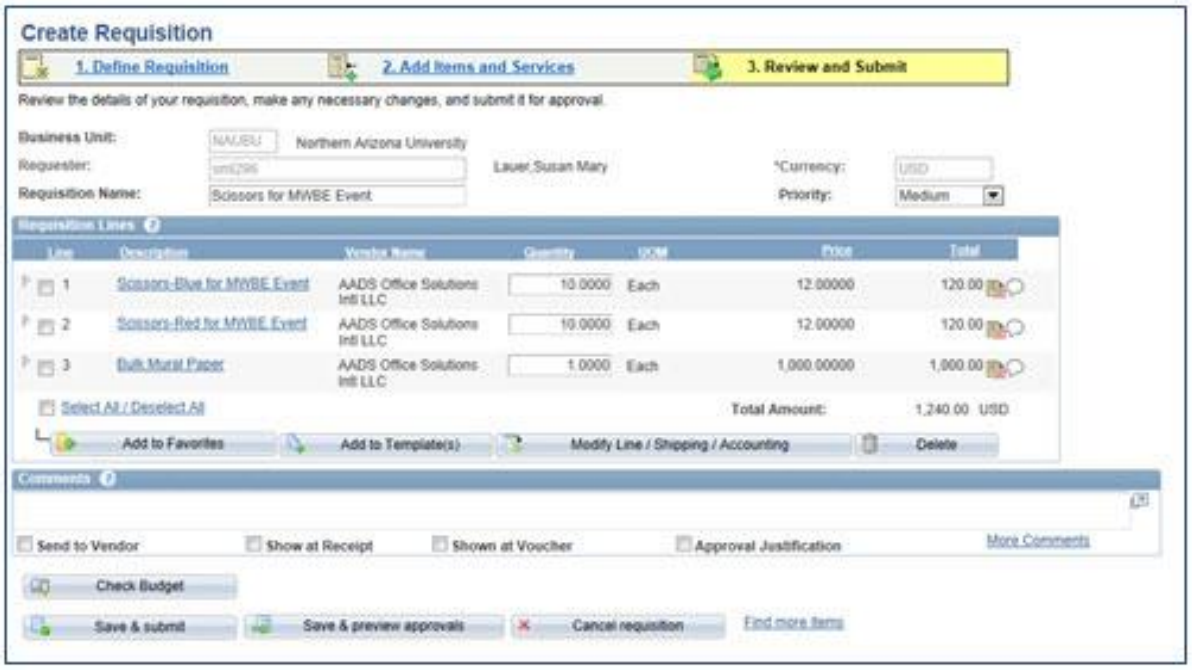
OPTIONAL: "Call Out Box" & "Spell Check Box"

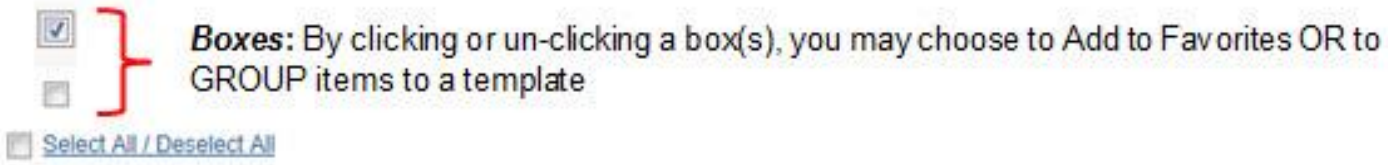
- *(optional)* Click icon on Comment's box to "call out" text box for easier viewing *(your preference)*
- *(optional) Click icon with in a "call out" box for a "spell check" of your text (your preference)*



OPTIONAL: Using Favorites to save frequently used individual line items

For items you use frequently, you may wish to use favorites to populate your requisition quickly without having to research what you've done before. These operate like a "copy & paste" function. To do this, when you are in a requisition with the desired information:





FAVORITES: If you find you are always requesting a repetitive item, you may add it as a "favorite".

Then, next time you order, simply click on your **"Favorites"**—complete the quantity you need *(if it is different than what is saved)*—click add. It is now automatically populated onto your Requisition.