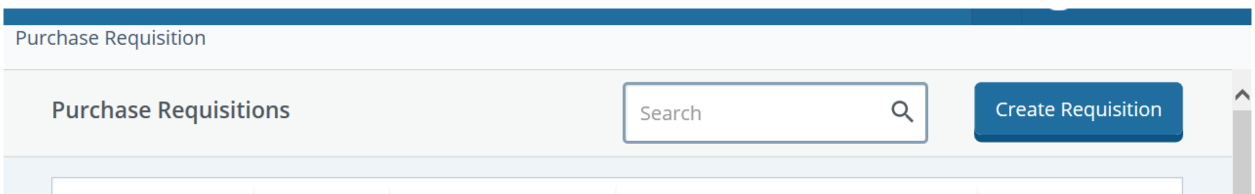
CREATE A REQUISITION

***NOTE: BEFORE CREATING AN ONLINE REQUISITION, PLEASE CHECK YOUR BUDGET TO MAKE SURE THERE IS MONEY AVAILABLE IN YOUR ACCOUNT. ANY REQUSITIONS IN NSF WILL BE RETURNED TO THE ORIGINATOR.

To begin the purchase process, use the Purchase Requisition dashboard page to create a purchase requisition.

Procedure

1. On the **Purchase Requisition** dashboard page, click **Create Requisition.**



2. On the **Requestor Information** page - Complete the following fields:

    - Requestor Defaults to user ID - specify who is requesting the purchase order using available fields if you are not the default requester for the account.
    - Transaction Date - defaults to current day.
    - Delivery Date – usually 1 week out from transaction date unless it is a Standing Order and then it stays the same as transaction date. Failure to add the delivery date will result in an error.
    - Document Level Accounting/Commodity Level Accounting – defaults to document level accounting. See description below to determine which one to choose.
    - Public Comment – this will print on the Purchase Order. Could be used for quote information and any other information that the Vendor needs to know.
    - Private Comment – This field is used for messages to Purchasing Department. Information in the Private Comment section will not appear on the Purchase Order.
    - Chart – this defaults to the chart assigned to the user.
    - Organization – change if needed to the org that the purchase order will be processed against. Org can be typed in or found by accessing the drop down list.
    - Ship to Location – Defaults to your main campus location. This can be changed if needed. See drop down box for additional ship to locations.
    - Attention To – Defaults to your home campus. Clear field and type the name of the individual that the products are to be shipped too.

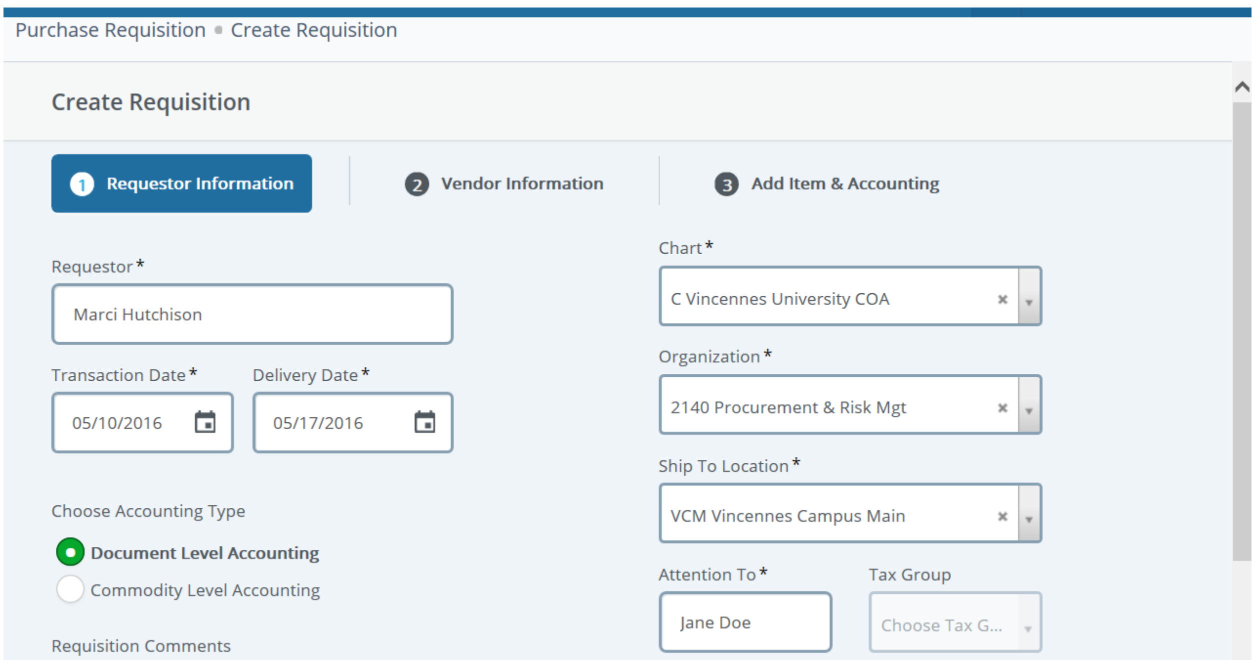
- Click **NEXT** to proceed to the next page. See print screen examples below.

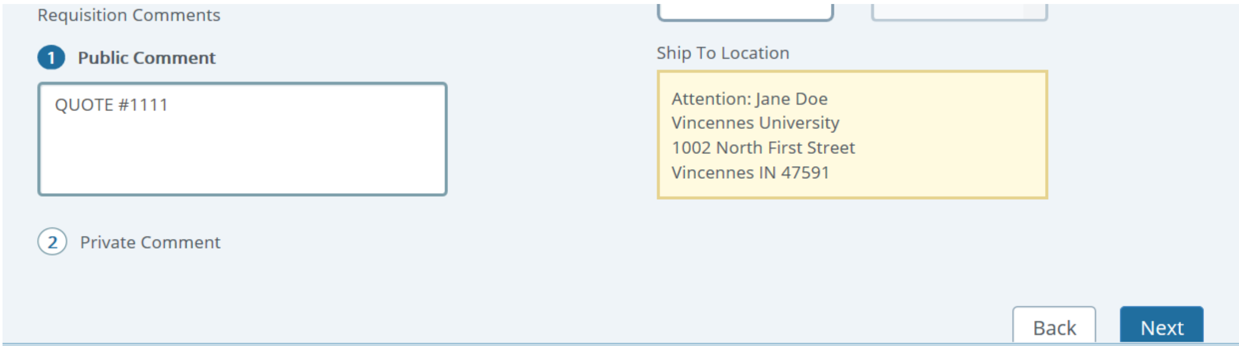
Document Level Accounting/Commodity Level Accounting

Document Level Accounting applies the accounting distribution to the entire document (all items being ordered) rather than to specific line items. ***Commodity Level Accounting*** applies an accounting distribution to each commodity (each specific item being ordered). The system defaults to ***Document Level Accounting*** so this button must be unchecked to apply ***Commodity Level Accounting***.

Commodity Level Accounting Example: Clay and drawing supplies are being ordered from Dick Blick. The clay is charged to 12006-2230-72102 and the drawing supplies is charged to 12008-2230-72102; therefore, this requisition should be entered as ***Commodity Level Accounting*** and the ***Document Level Accounting*** button should be unchecked.

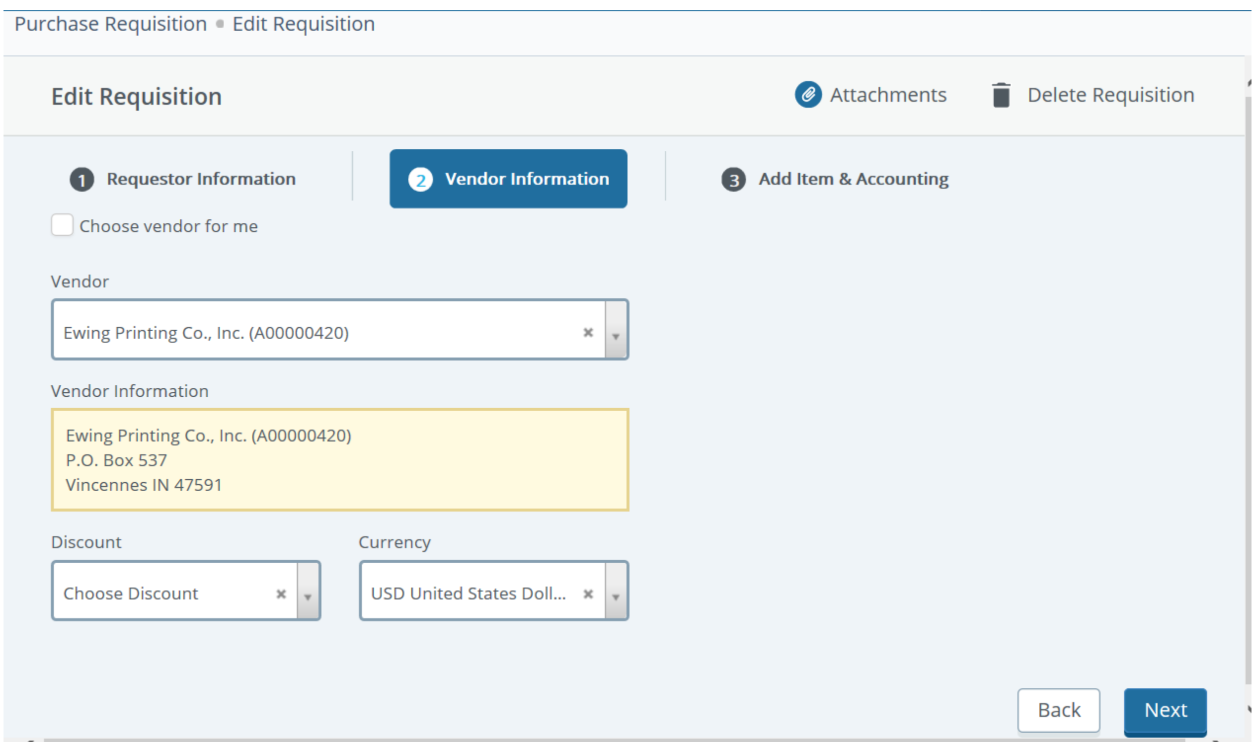
Document Level Accounting Example: Drawing and painting supplies are being ordered from Dick Blick. All of these supplies are charged to 12008-2230-72102; therefore, this requisition should be entered as ***Document Level Accounting*** button and the button should remain checked.





3. On the **Vendor Information** page, select the vendor for the requisition. By default, the **Choose Vendor for me** check box is checked. When checked, the system chooses a vendor for you. Uncheck the check box if you want to select the vendor.

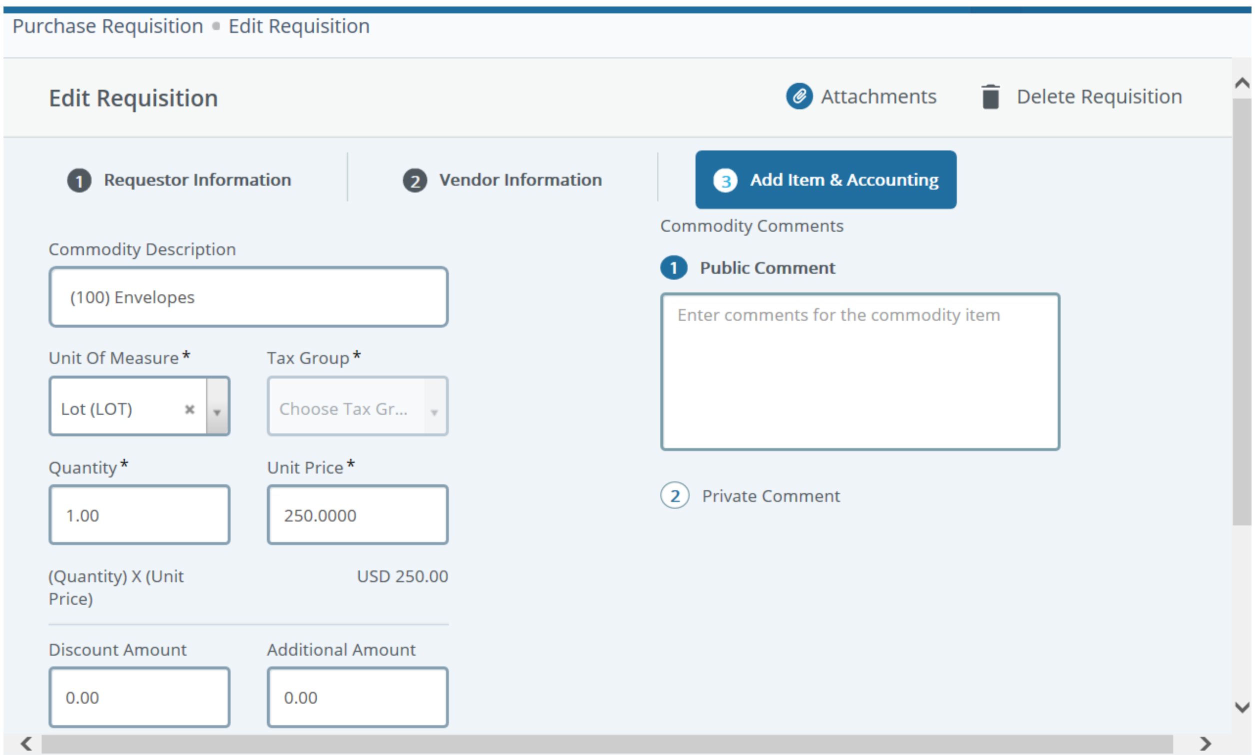
- Vendor – Key in Vendor name. Verify the correct Vendor address if more than one option.
- Discount – Leave as is. This field is for Purchasing use only.
- Currency – Leave as US dollars.
- Next



4. On the **Add Item & Accounting** page, add an item using the Add Item(s) field. After an item is selected, the page updates with required fields for the selected item.

- Type description of item to be ordered.
- Unit Of Measure – Frequently used unit of measure are Each and Lot. Lot is normally used for Standing Purchase Orders.
- Quantity – Clear field to enter quantity.
- Unit Price – Clear field to enter unit price.
- Discount Amount – Enter any discount amount as needed.
- Public Comment – this will print on the Purchase Order. Use for wrap around text.
- Save and repeat steps above for additional products.

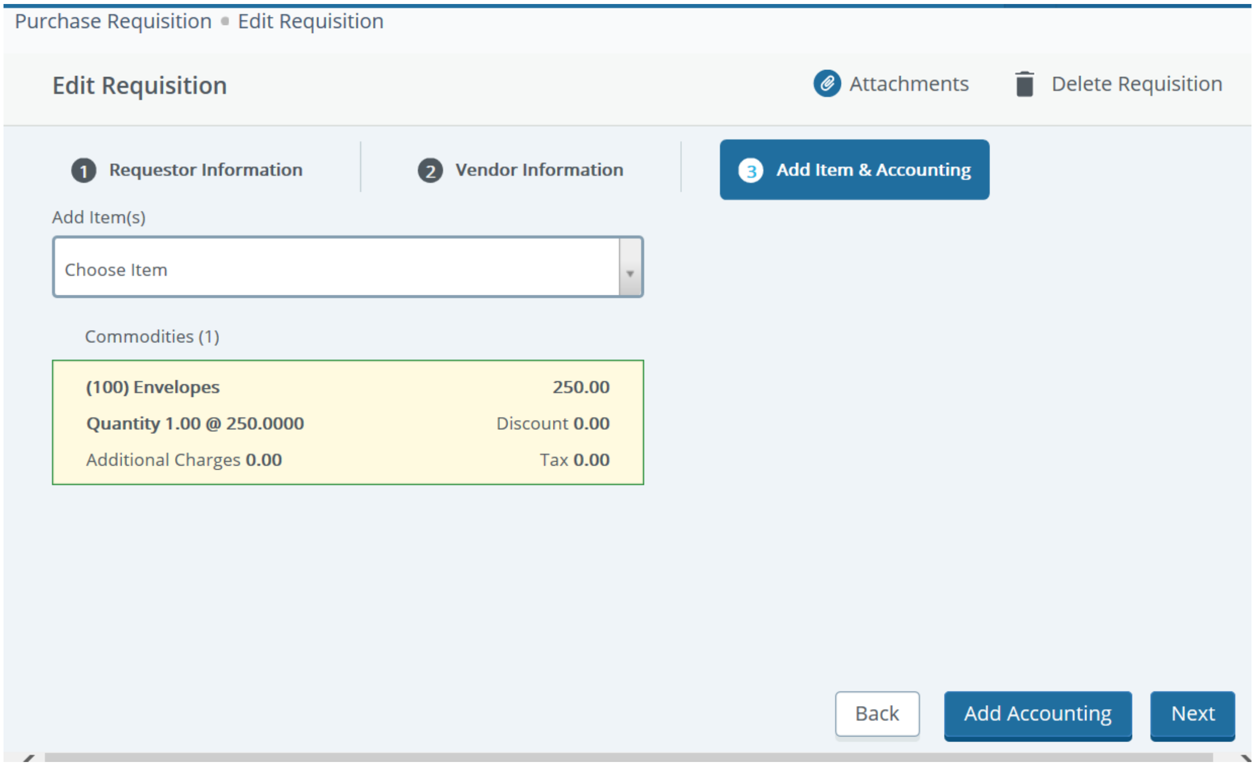
Use the **X in the item boxes to clear the field.



5. Click **Save.**

The page refreshes with the item you just added listed below the **Add Item(s)** field in the **Commodities** list. You can click any item in the list to view its detail.

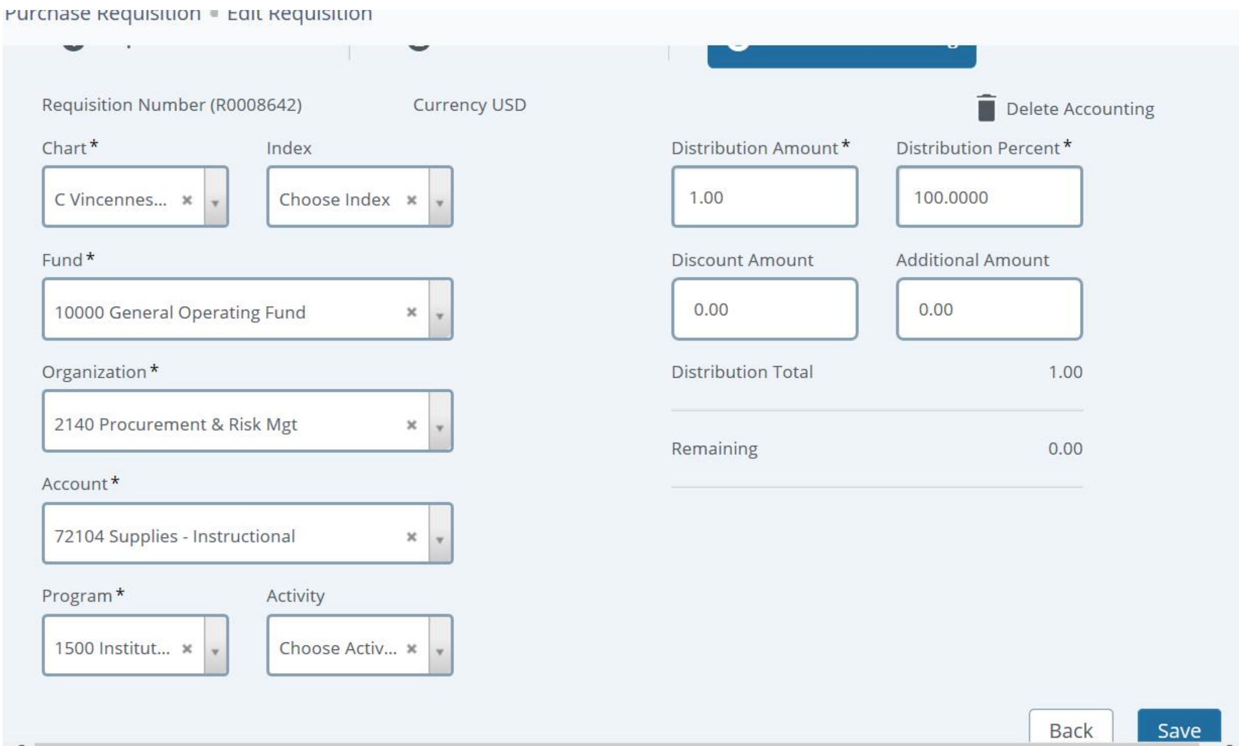
6. Repeat steps 4 and 5 as necessary to add additional items to the requisition.



7. Click **Add Accounting.** The page refreshes with the required fields for accounting information.

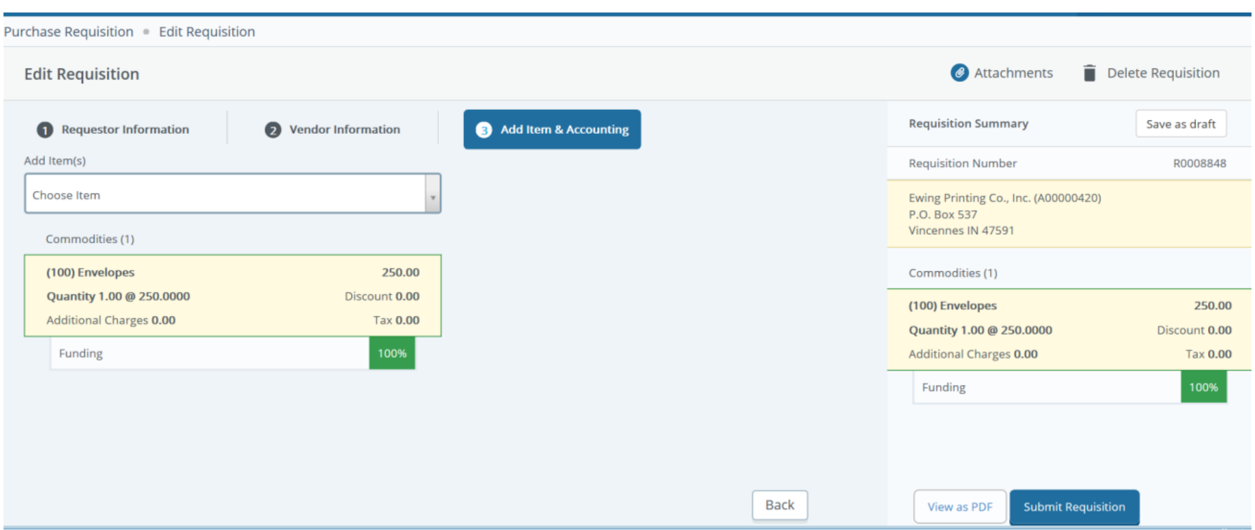
- Fund – Choose Fund by drop down list or type fund.
- Organization – Choose Org by drop down list or type org.
- Account – Choose Account by drop down list or type account.
- Program – Type Program or select from drop down list if it does not automatically default.
- Distribution Amount – Can be changed if splitting cost between Funds/Orgs/Accounts. For example if one fund is paying $35, then input 35.00. This will adjust the distribution percentage. Remaining balance will be displayed below. Click Splitting accounts link to add additional accounting information.
- Distribution Percent – Can be changed if splitting cost between Funds/Orgs/Accounts. For examples if one fund is paying 50%, then input 50.00. The system will adjust the Distribution amount. Remaining balance will be displayed below. Click Splitting accounts to add additional accounting information.

Make sure that funding is at 100% before proceeding.



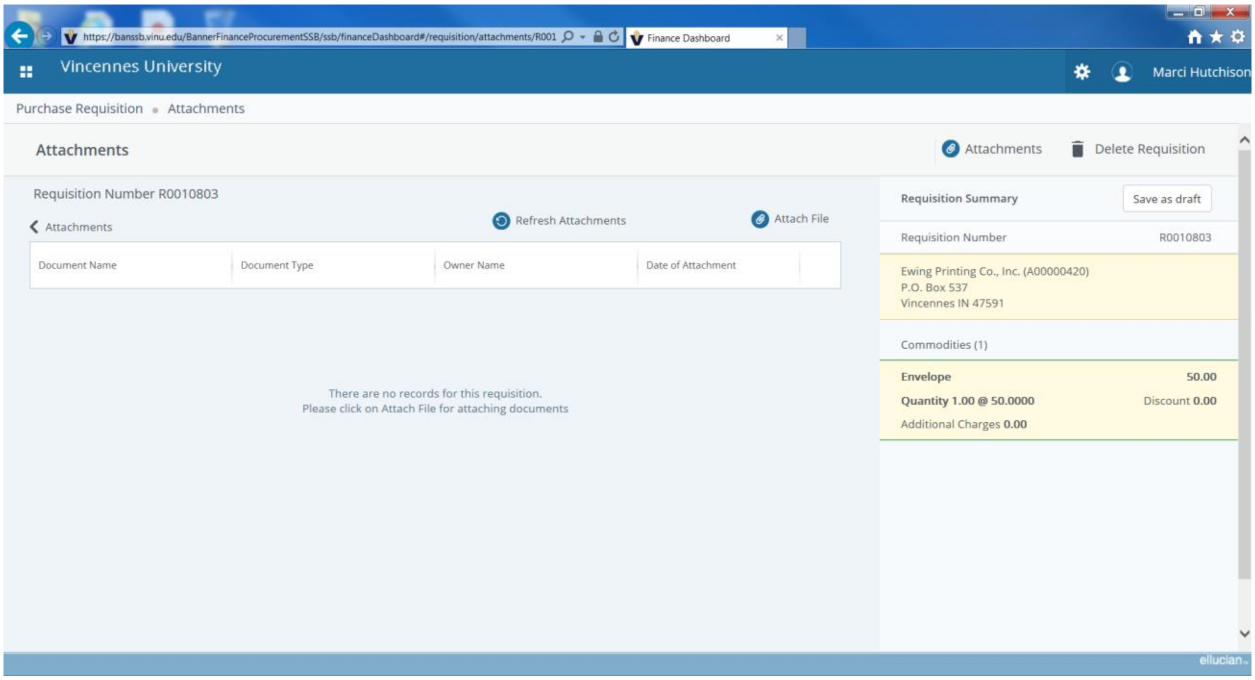
8. Click **Save.** The Requisition Summary updates.

9. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requisition** to send the requisition for approval.

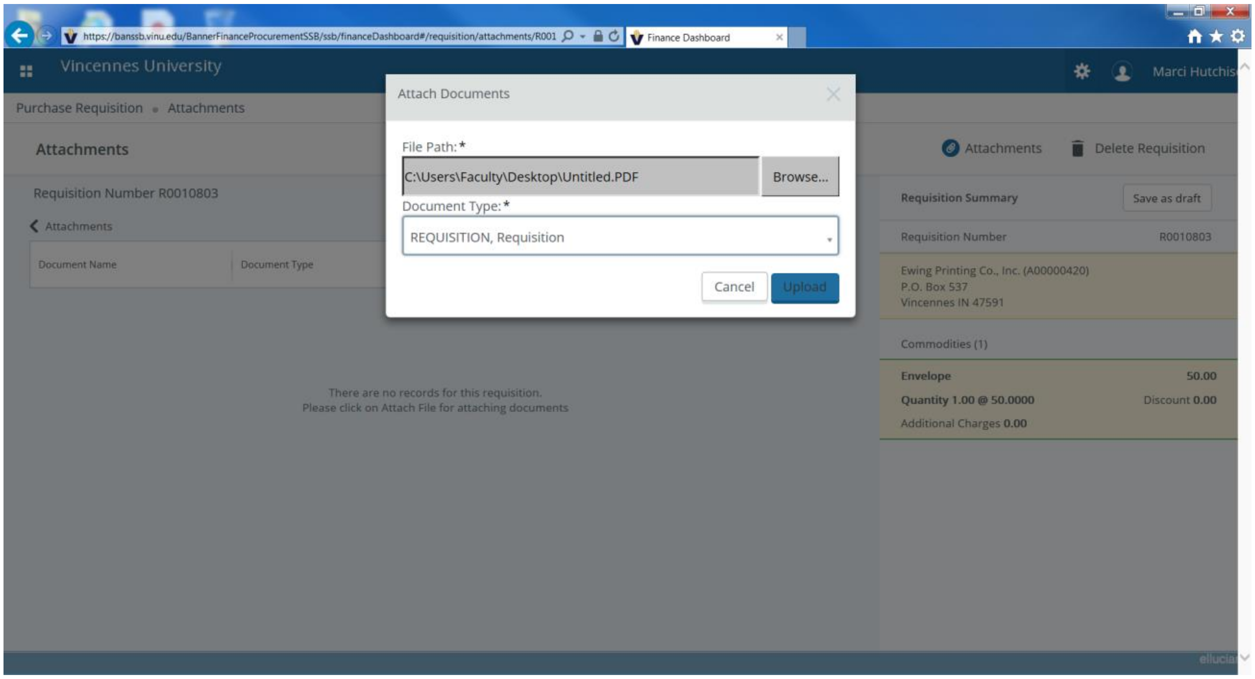


10. **Attaching Requisition Backup Documentation (Quotes, Etc.)**

- Click Attachments
- Click Attach File



- Browse to find documents to attach from hard drive
- Document Type: Click drop down and select Requisition
- Click upload
- Return to Requisition



11. **The Submit Requisition button will be blue if requisition is complete with no errors.**

After submitting the requisition, the R number will be in the upper right hand corner and will appear on the dashboard.

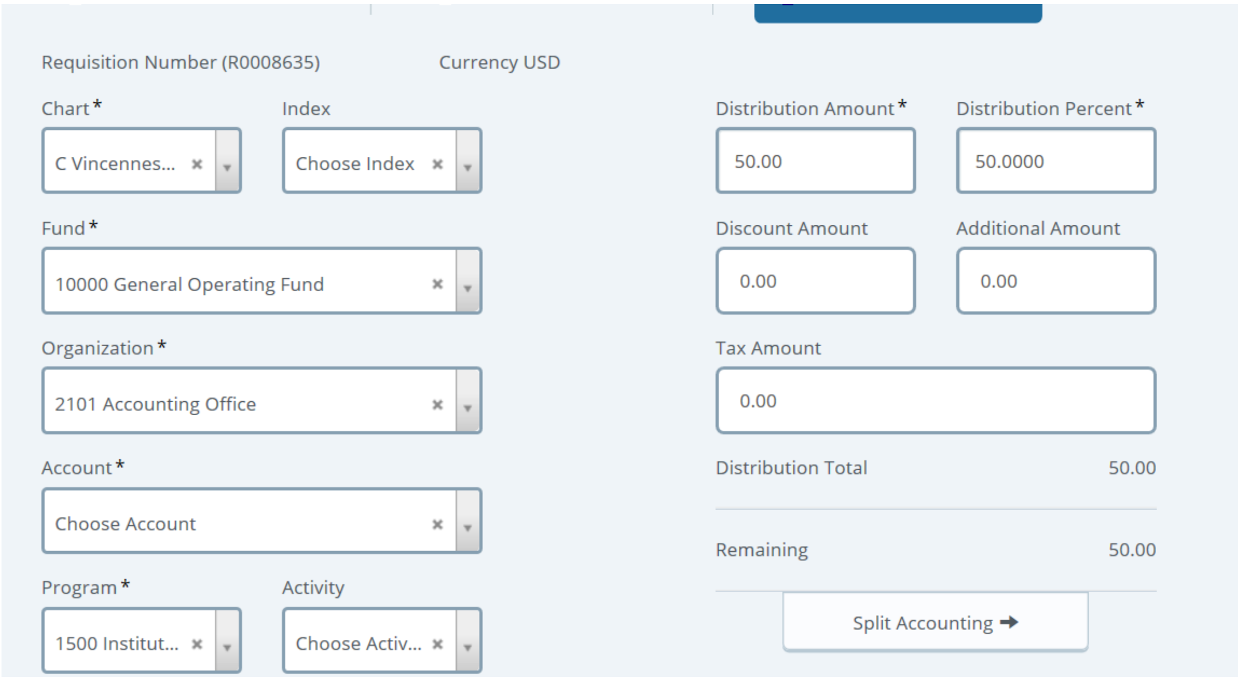
SPLIT ACCOUNTS

If you want to use 2 or more accounts for a requisition.

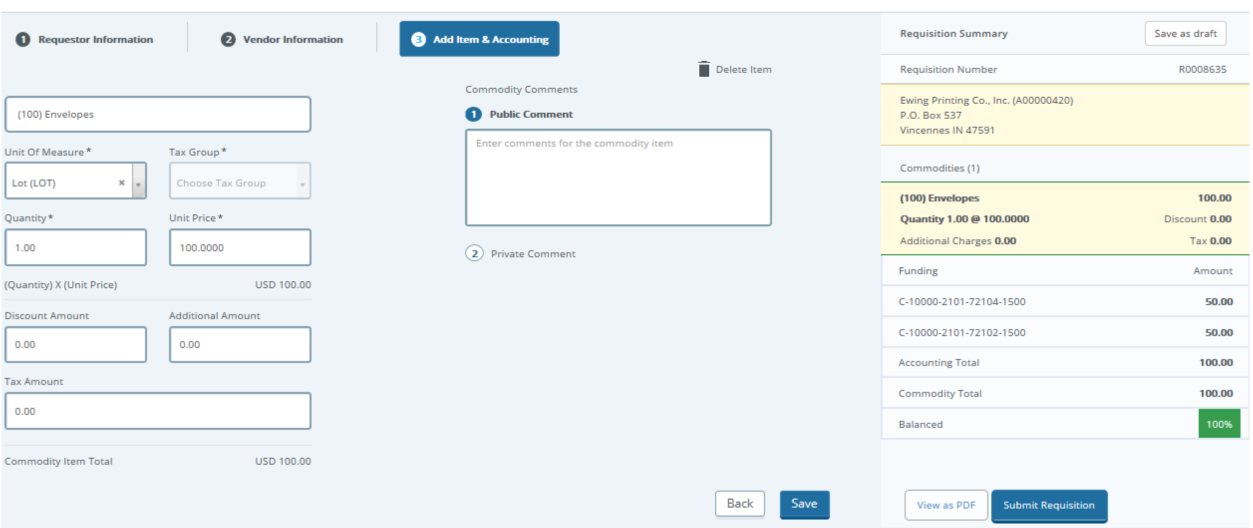
Procedure

1. To split accounts use the distribution amount or distribution percent to direct the correct amount to the correct account. Use the Split Accounting feature and add the additional accounts. The split can be

in Dollars (Distribution Amount) or Percentage (Distribution Percent). Funding needs to be at 100% to complete requisition.



2. To check the accounting information click the commodities portion on the right side of the screen. Items should show 100% and the submit button will be blue to complete.

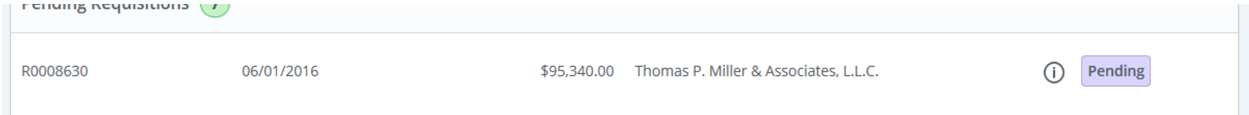


Recall A Requisition

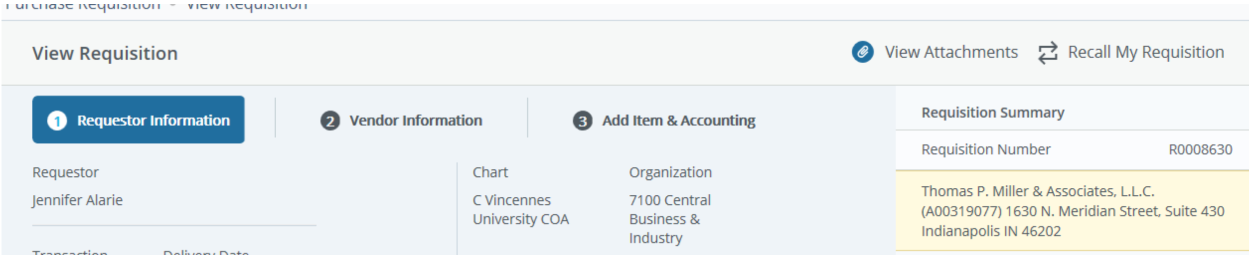
Procedure

You can recall requisitions that are in Pending status.

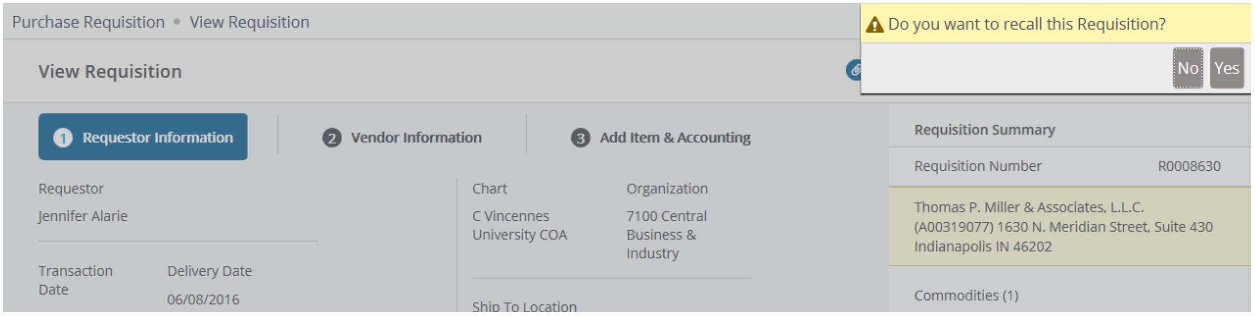
1. On the **Purchase Requisitions** dashboard page, open the pending requisition that you want to recall.



2. Click **Recall My Requisition.**



3. On the recall prompt, choose the appropriate option. (yes or no) This will put the requisition back on your dashboard as a draft. Once your document is back as a draft you are able to edit or delete as needed.



View as PDF

You can download the purchase requisition as a PDF file to verify requisition information is correct.

Procedure

1. Open the requisition that you want to view as a PDF.

2. Click **View as PDF.** (Purchase Requisition formats the requisition's information into a PDF format)

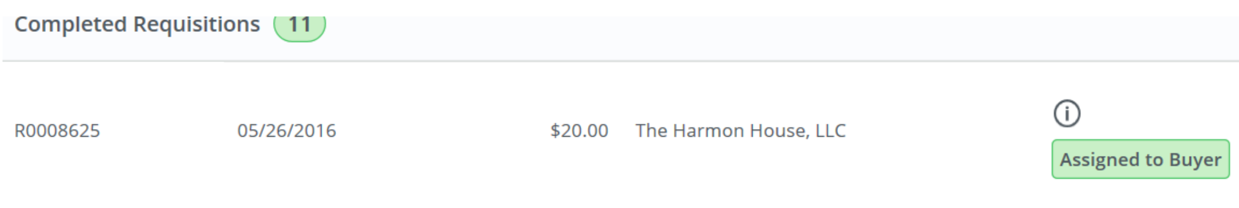
3. Right-click in the PDF file for other options, such as printing the requisition.

Copy A Requisition

You can copy a completed requisition and use it as a template for a new requisition.

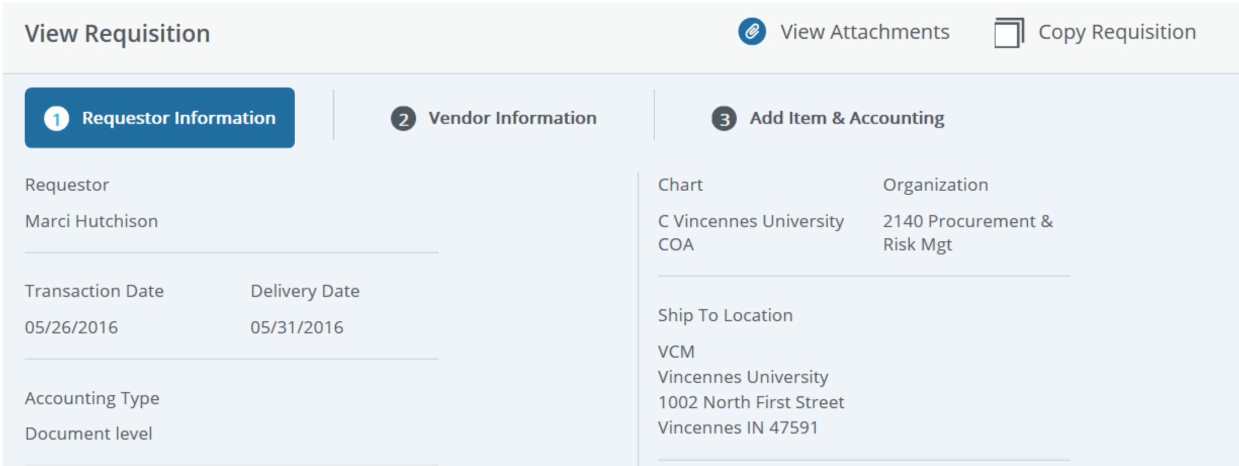
Procedure

1. On the **Purchase Requisition** dashboard page, click the completed requisition you want to copy.

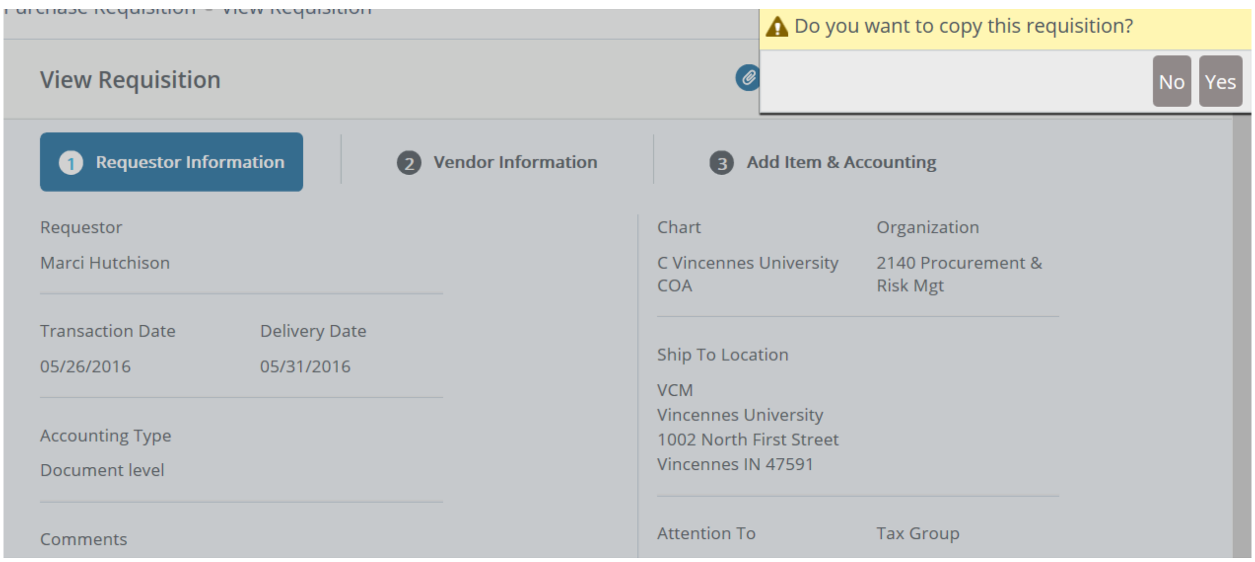


The requisition opens on the **Requestor Information** page

2. Click **Copy Requisition.**



3. On the copy prompt, choose the appropriate option. (Yes – the system copies the requisition and creates an identical new requisition that you can edit. No- the system cancels the copy)



4. Edit the requisition and complete as you would on a new requisition.

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