

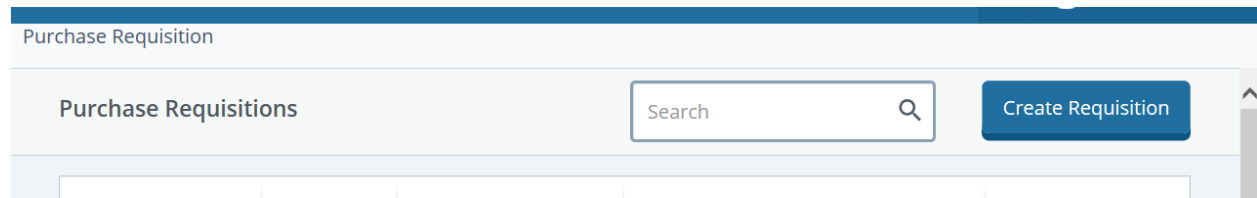
CREATE A REQUISITION

*****NOTE: BEFORE CREATING AN ONLINE REQUISITION, PLEASE CHECK YOUR BUDGET TO MAKE SURE THERE IS MONEY AVAILABLE IN YOUR ACCOUNT. ANY REQUISITIONS 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.

Purchase Requisition • Create Requisition

Create Requisition



1 Requestor Information | **2 Vendor Information** | **3 Add Item & Accounting**



Requestor *
Marci Hutchison



Transaction Date * 05/10/2016  Delivery Date * 05/17/2016 

Choose Accounting Type
 Document Level Accounting
 Commodity Level Accounting


Requisition Comments

Chart *
C Vincennes University COA  

Organization *
2140 Procurement & Risk Mgt  

Ship To Location *
VCM Vincennes Campus Main  

Attention To * Jane Doe

Tax Group
Choose Tax G... 

Requisition Comments

1 Public Comment

QUOTE #1111

2 Private Comment

Ship To Location

Attention: Jane Doe
Vincennes University
1002 North First Street
Vincennes IN 47591

Back Next

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

Purchase Requisition • Edit Requisition

Edit Requisition Attachments Delete Requisition

1 Requestor Information **2 Vendor Information** **3 Add Item & Accounting**

Choose vendor for me

Vendor

Ewing Printing Co., Inc. (A00000420)

Vendor Information

Ewing Printing Co., Inc. (A00000420)
P.O. Box 537
Vincennes IN 47591

Discount

Choose Discount

Currency

USD United States Doll...

Back 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.

Purchase Requisition > Edit Requisition

Edit Requisition

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Commodity Description

(100) Envelopes

Unit Of Measure* Tax Group*

Lot (LOT) X Choose Tax Gr...

Quantity* Unit Price*

1.00 250.0000

(Quantity) X (Unit Price) USD 250.00

Discount Amount Additional Amount

0.00 0.00

Commodity Comments

1 Public Comment

Enter comments for the commodity item

2 Private Comment

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.

Purchase Requisition • Edit Requisition

Edit Requisition

Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (1)

(100) Envelopes	250.00
Quantity 1.00 @ 250.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Back Add Accounting Next

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.

Requisition Number (R0008642) Currency USD Delete Accounting

Chart* Index

C Vincennes... x ▾ Choose Index x ▾

Fund*

10000 General Operating Fund x ▾

Organization*

2140 Procurement & Risk Mgt x ▾

Account*

72104 Supplies - Instructional x ▾

Program* Activity

1500 Institut... x ▾ Choose Activ... x ▾

Distribution Amount* Distribution Percent*

1.00 100.0000

Discount Amount Additional Amount

0.00 0.00

Distribution Total 1.00

Remaining 0.00

Back Save

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.

Purchase Requisition ▾ Edit Requisition

1 Requirer Information 2 Vendor Information 3 Add Item & Accounting

Add Item(s)

Choose Item

Commodities (1)

(100) Envelopes	250.00
Quantity 1.00 @ 250.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%

Attachments Delete Requisition

Requisition Summary Save as draft

Requisition Number R0008848

Ewing Printing Co., Inc. (A00000420)
P.O. Box 537
Vincennes IN 47591

Commodities (1)

(100) Envelopes	250.00
Quantity 1.00 @ 250.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%

Back View as PDF Submit Requisition

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

- Click Attachments
- Click Attach File

The screenshot shows a web browser window with the URL <https://banisb.viu.edu/BannerFinanceProcurementSSB/ssb/financeDashboard#/requisition/attachments/R001>. The page title is "Vincennes University" and the user is identified as "Marci Hutchison". The breadcrumb trail is "Purchase Requisition > Attachments".

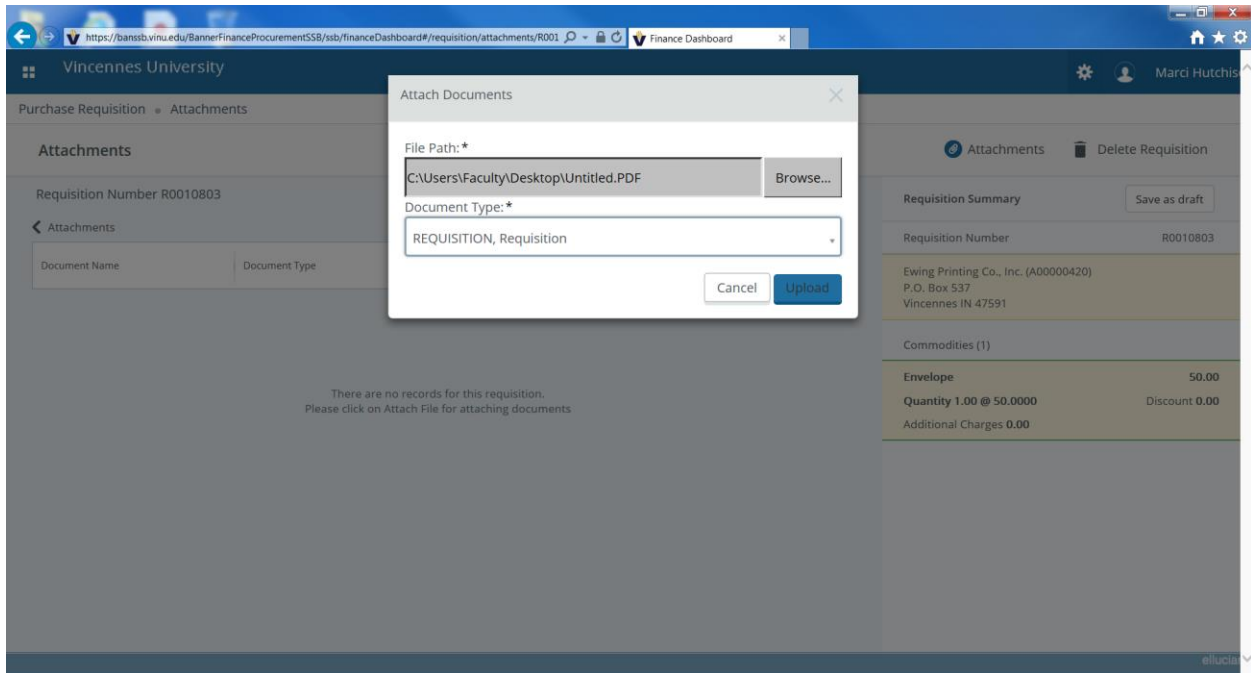
The main content area is titled "Attachments" and shows "Requisition Number R0010803". It features a table with columns for "Document Name", "Document Type", "Owner Name", and "Date of Attachment". Below the table, a message states: "There are no records for this requisition. Please click on Attach File for attaching documents".

On the right side, there is a "Requisition Summary" section with a "Save as draft" button. The summary includes the requisition number R0010803 and the vendor information: "Ewing Printing Co., Inc. (A00000420), P.O. Box 537, Vincennes IN 47591". Below this is a "Commodities (1)" table:

Commodity	Quantity	Unit Price	Discount
Envelope	1.00	50.0000	0.00

Additional Charges are listed as 0.00.

- 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.

Requisition Number (R0008635) Currency USD

Chart* Index

C Vincennes... * Choose Index * ↓

Fund*

10000 General Operating Fund * ↓

Organization*

2101 Accounting Office * ↓

Account*

Choose Account * ↓

Program* Activity

1500 Institut... * Choose Activ... * ↓

Distribution Amount* Distribution Percent*

50.00 50.0000

Discount Amount Additional Amount

0.00 0.00

Tax Amount

0.00

Distribution Total 50.00

Remaining 50.00

Split Accounting →

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.

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting Delete Item

(100) Envelopes

Unit Of Measure* Tax Group*

Lot (LOT) * Choose Tax Group * ↓

Quantity* Unit Price*

1.00 100.0000

(Quantity) X (Unit Price) USD 100.00

Discount Amount Additional Amount

0.00 0.00

Tax Amount

0.00

Commodity Item Total USD 100.00

Commodity Comments

1 Public Comment

Enter comments for the commodity item

2 Private Comment

Requisition Summary Save as draft

Requisition Number R0008635

Ewing Printing Co., Inc. (A00000420)
P.O. Box 537
Vincennes IN 47591

Commodities (1)

(100) Envelopes	100.00
Quantity 1.00 @ 100.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00

Funding	Amount
C-10000-2101-72104-1500	50.00
C-10000-2101-72102-1500	50.00
Accounting Total	100.00
Commodity Total	100.00
Balanced	100%

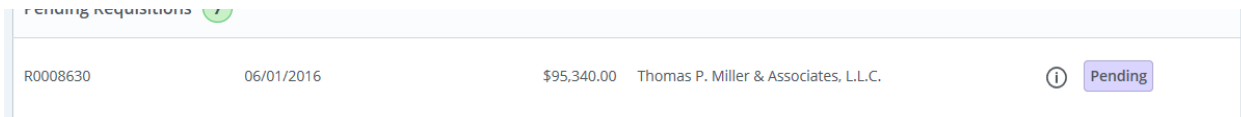
Back Save View as PDF Submit Requisition

Recall A Requisition

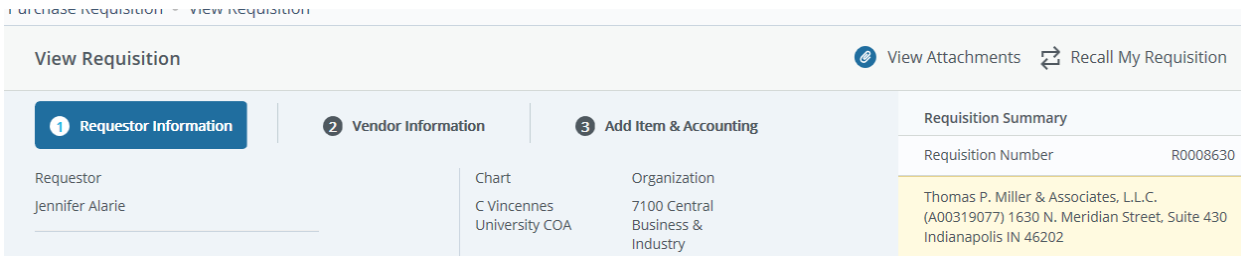
Procedure

You can recall requisitions that are in Pending status.

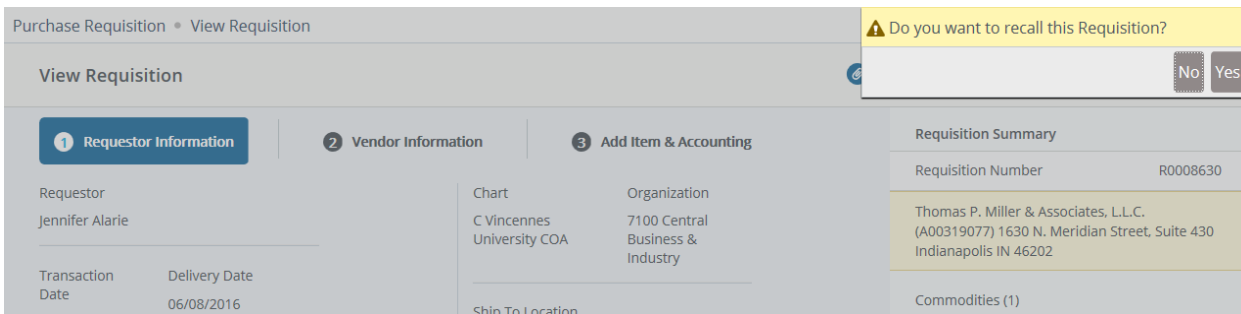
1. On the **Purchase Requisitions** dashboard page, open the pending requisition that you want to recall.



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.

Completed Requisitions 11			
R0008625	05/26/2016	\$20.00 The Harmon House, LLC	 Assigned to Buyer

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

2. Click **Copy Requisition**.

The screenshot shows the 'View Requisition' page with three tabs: '1 Requestor Information', '2 Vendor Information', and '3 Add Item & Accounting'. The 'Copy Requisition' button is visible in the top right corner. The page content is as follows:

1 Requestor Information		2 Vendor Information		3 Add Item & Accounting	
Requestor		Chart	Organization		
Marci Hutchison		C Vincennes University COA	2140 Procurement & Risk Mgt		
Transaction Date	Delivery Date	Ship To Location			
05/26/2016	05/31/2016	VCM			
Accounting Type		Vincennes University			
Document level		1002 North First Street			
		Vincennes IN 47591			

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)

The screenshot shows the 'View Requisition' page with a yellow dialog box overlaying the top right corner. The dialog box contains the text 'Do you want to copy this requisition?' and two buttons: 'No' and 'Yes'. The page content is as follows:

1 Requestor Information		2 Vendor Information		3 Add Item & Accounting	
Requestor		Chart	Organization		
Marci Hutchison		C Vincennes University COA	2140 Procurement & Risk Mgt		
Transaction Date	Delivery Date	Ship To Location			
05/26/2016	05/31/2016	VCM			
Accounting Type		Vincennes University			
Document level		1002 North First Street			
		Vincennes IN 47591			
Comments		Attention To	Tax Group		

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

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