

Requisition Guide for Requesters

A requisition is the first step in the procurement process.

The Requestor fills out the requisition for the supplies/ equipment /services required for their department or project.

The screenshot displays the EagleLINKS web application interface. At the top, there is a navigation bar with links for Home, Worklist, Add to Favorites, and Sign out. A menu on the left side lists various system functions, with 'Add/Update Requisitions' highlighted. The main content area is titled 'Requisitions' and features two tabs: 'Find an Existing Value' and 'Add a New Value'. Below the tabs, there are input fields for 'Business Unit' (containing 'COPPN') and 'Requisition ID' (containing 'NEXT'). A yellow 'Add' button is positioned below these fields. At the bottom of the main area, there are links for 'Find an Existing Value' and 'Add a New Value'.

From Menu Page select: **Purchasing>Requisition>Add/Update Requisitions**

Select **Add** to begin the requisition process.

The format of a requisition consists of 4 basic parts:

Header, Line and Schedule  (Form Screen))

Distribution , page 2

HEADER – The following field must be completed

- Requester – Person completing the requisition, defaults to
- Requisition Date- Date the requisition is being processed
- Requisition Defaults (blue link located under Header)
 - Vendor: Select the Vendor: click on the magnifying class next to the vendor box. Enter the first three 3 letters in the vendors name. Make sure the selection criteria is at 'Begins with'. Click the yellow search button and select the vendor by clicking on the vendor (click anywhere in the blue link)
 - Ship To: Click on the magnifying glass for the Department to ship to.

Adding Lines

LINE

- Description:** Provide a thorough explanation of the supplies or services to be purchased. Include part numbers (vendor or manufacturer) color, dimensions, if applicable.
- Quantity:** The total number of items being purchased
- UOM:** Unit of Measure: This would be the quantity (each, box, etc.) (click on the magnifying glass next to box to determine the UOM)
- Category:** Select what the category the at is the appropriate fund account, i.e. Office Supplies, Training/Seminars, Printing, etc. Click on the magnifying glass next to the box to search for the category.
- Price:** Total cost of the requisition can be entered here.

SCHEDULE

- Ship To- This information will appear once you have selected the Ship to from the header Defaults
- Status- This shows that the Requisition is active

Ship To- This information will appear once you have selected the Ship

to from the header Defaults

Req. Quantity- Verify the information that was populated from Form page

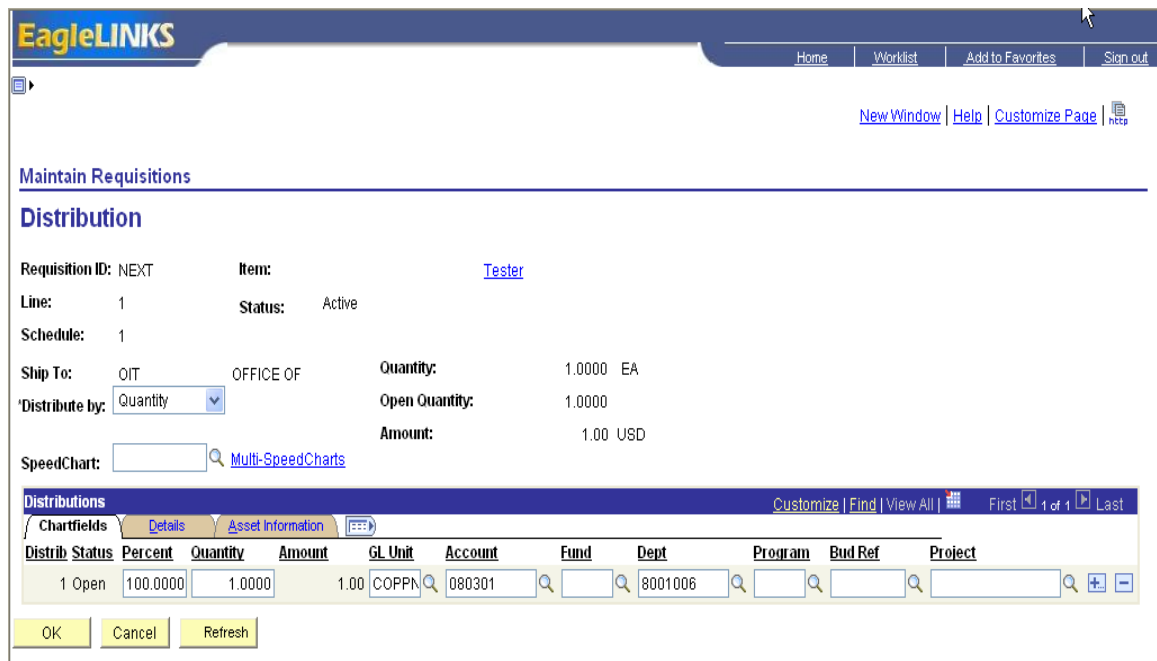
Price-Verify the information that was populated from Form page

Amount- Verify the information that was populated from Form page

Status- Verify the information that was populated from Form page

DISTRIBUTION

From the schedule page Click on the Distribution icon 



EagleLINKS Home Worklist Add to Favorites Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | 

Maintain Requisitions

Distribution

Requisition ID: NEXT Item: [Tester](#)


Line: 1 Status: Active


Schedule: 1

Ship To: OIT OFFICE OF Quantity: 1.0000 EA

Distribute by: Quantity Open Quantity: 1.0000

SpeedChart: [Multi-SpeedCharts](#) Amount: 1.00 USD

Distributions Customize | Find | View All |  First 1 of 1 Last

Chartfields Details Asset Information 

Distrib	Status	Percent	Quantity	Amount	GL Unit	Account	Fund	Dept	Program	Bud Ref	Project
1	Open	100.0000	1.0000		1.00	COPPN	080301		8001006		

OK Cancel Refresh

CHANGE DISTRIBUTE BY Quantity to **Amount**

Speed Chart- Put the last four digits of the department or project number in the SPEED CHART box. Click on the magnifying glass to make sure the number reflects the correct department or project. This action will populate your chart fields (Department/Project/Program/Fund Code)

You must copy or record the Account number when using the Speed Chart. The account number will disappear when using the Speed Chart. It must be re-entered by typing or pasting it in the Account field box.

Keep in mind that for every line item on the HEADER/LINE there should be a distribution line on the DISTRIBUTION page.

*NOTE: for requisitions with multiple line items and the distribution chartfields are the same for each line item, you can enter the distribution chartfields from the REQUISITION DEFAULT link, located on the main page.

SAVE YOUR REQUISITION AND RECORD THE REQUISITION NUMBER.
PRINT A SNAPSHOT COPY AND FORWARD
TO PROCUREMENT
WITH ALL REQUIRED DETAIL, QUOTES, ETC.

REQUISITION IS NOW READY FOR APPROVAL

After the requisition has been completed, it must **be approved and budget checked** the department Approver
Computer related items (computers, laptops, scanners, printers, software, etc.) it must be approved by OIT Department
Requisitions charge t Title III the must be approved by the Title III Grants Administrator.

**REQUISITION WILL SHOW
ON THE WORK LIST OF THE
PROCUREMENT DIRECTOR**

Requisitions are pulled from the PeopleSoft system by 11:00AM each day.
The requisition is then assigned to a buyer for processing into a Purchase Order.
Purchase Order is faxed to Vendor, Paid for using VISA for acceptable procurements, recorded on a spreadsheet, and filed in both a numeric and alpha file.