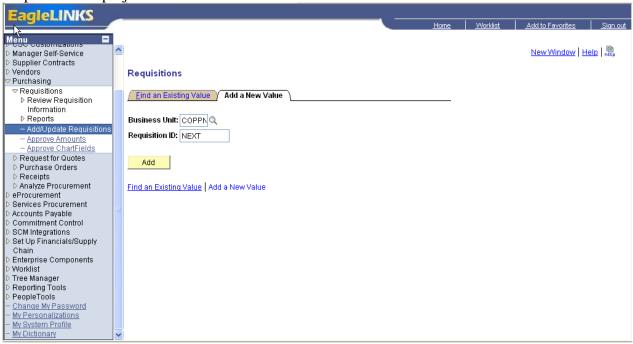
Requisition Guide for Requesters

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.



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

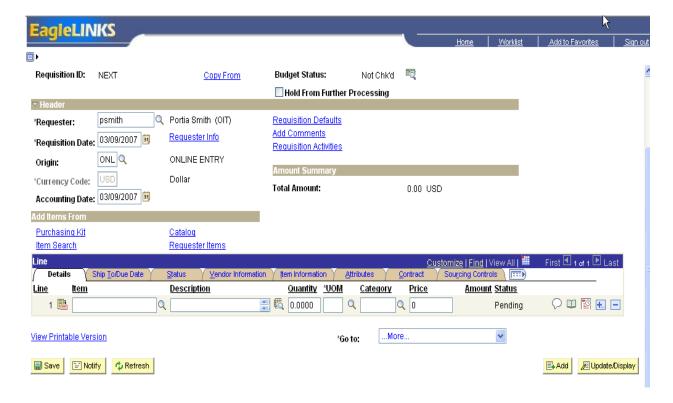
HEADER – The following field must be completed

- 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

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



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 REQUISTION 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.