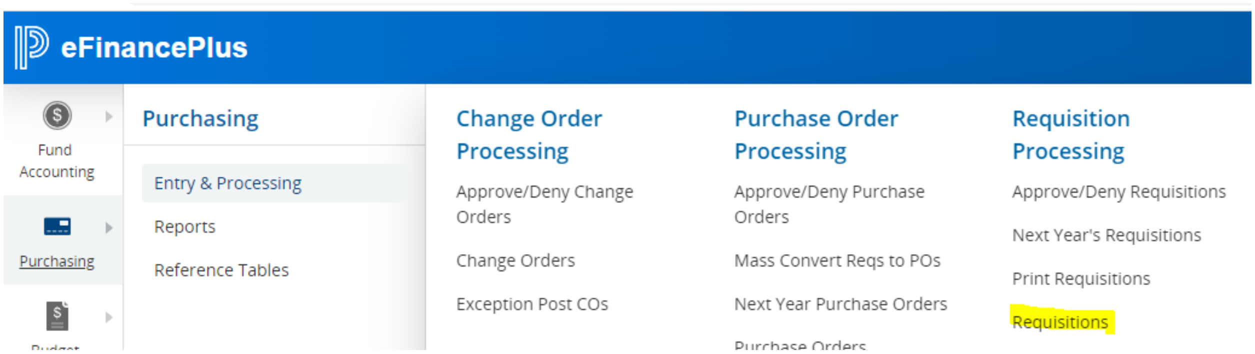
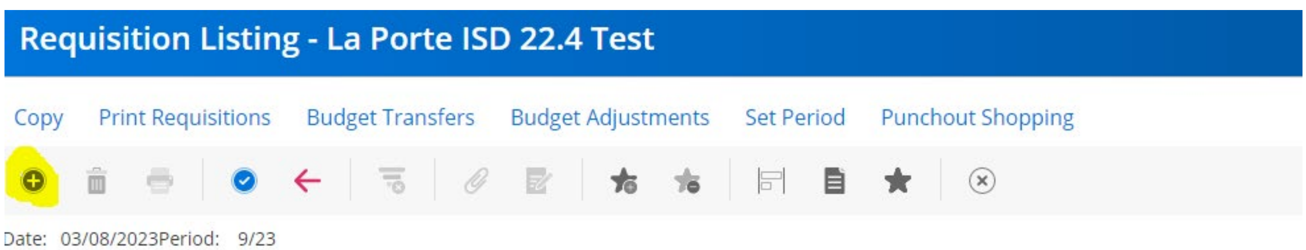
Creating a Requisition

Purchasing—Entry & Processing—Requisition



Click on the Plus button



TAB is your friend in efiance, it will take you to the next lines.

Choose the correct approval group, Federal funds or General account.

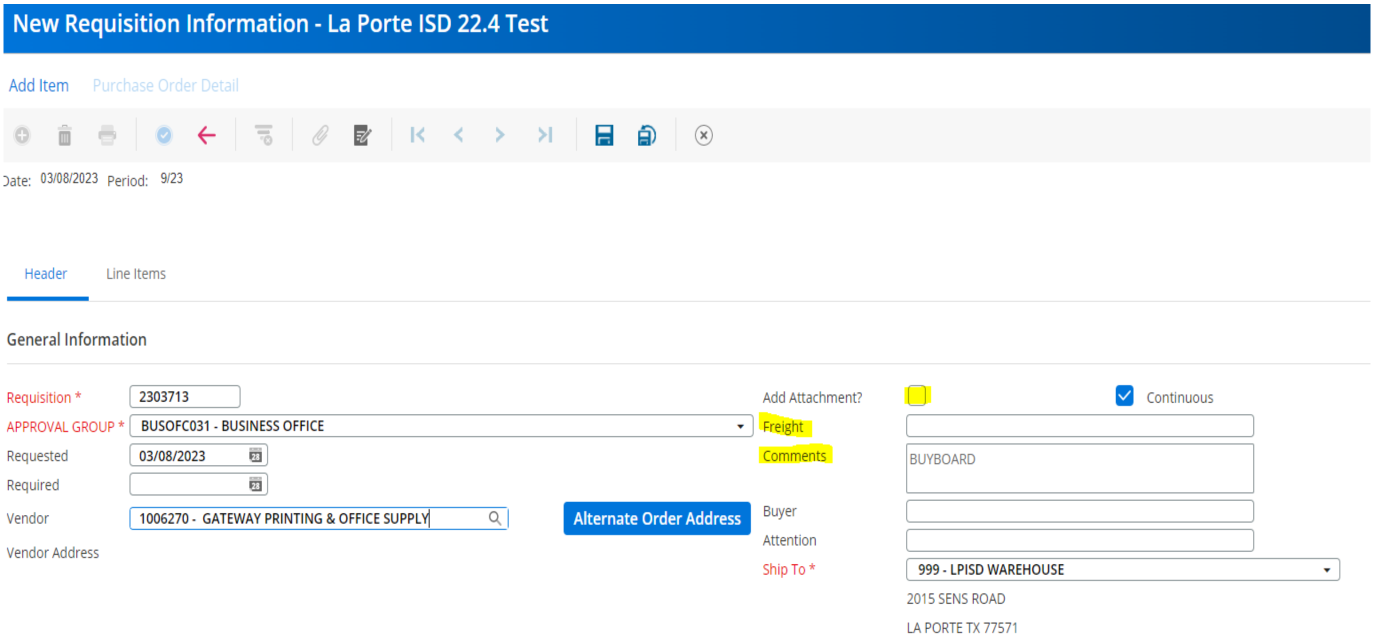
Tab to vendor, type in the vendor name, if you are not sure click on the looking glass and it will take you to the search page. You can put in a few letters and then * and lick Search and it will pull up vendors with those letters. Ex Gate* Double click on the vendor you need.

Freight- is always PPD- for shipping or FFA for no shipping cost

Comments- this is where you will put in the Coop information- ESC5, Buyboard ect.. or Student Funds (865), Faculty Funds (77), Registration if it's a training, NB if they are not on a coop

Buyer and Attention- your name and school

Add Attachment- check this box to add any attachments to the req.



Once you are done on this page TAB to the next page

This is where you will start to enter your items

Commodity code- you must put in a commodity code, Tab to next line

Description- this will auto generate whatever the commodity code is. Please clear it out and put your ITEM number and a description of the item. If it is registration, please put the person's name, date of conference and a session number if they have one.

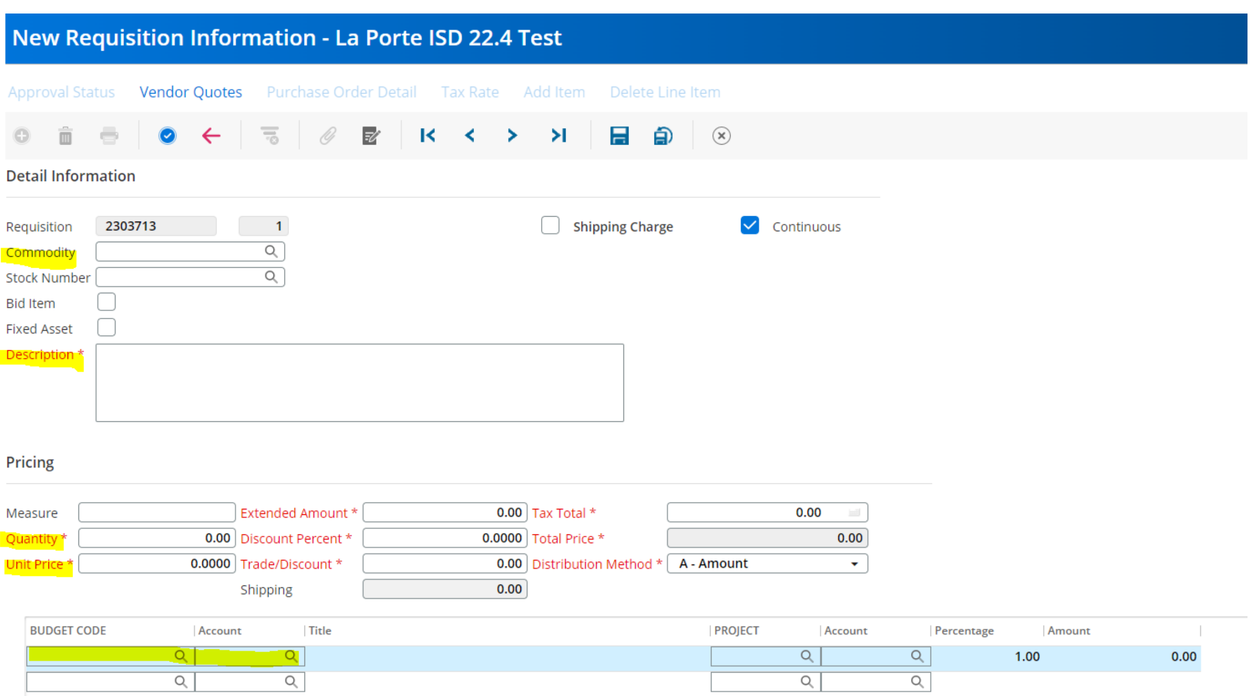
Quantity- how many are you buying

Unit price- the price of the item

Budget code- enter your budget information.

If you have shipping make sure to check the shipping charge box, it will take you to a page to add the shipping cost.

When you are done click the Blue disk to save it



CREATING A REQUISITION

STEPS

1. On the left hand side of the screen click ***Main Menu / Purchasing / Requisition Processing / Requisition*** (*This will open up your requisition screen – from here you can also search previously entered requisitions*)

2. Click ***New*** at the top of the screen to begin your new requisition. *This will put you into the "**Header**" tab of the requisition and generate your requisition number (make note of this number)*

Fill in the following fields of the *"Header"* section:

Please note: If you have the ***Continuous* box checked it will automatically generate a new requisition when you are done entering. It will pop up with a new requisition at the end of the requisition you are currently in.**

3. Approval Group (*find your campus in the drop down and select)*
4. Requested (*date requisition was generated)*
5. Required (*nothing needs to be put in here*)
   *Keep in mind the approval process. Please email purchasing if you have a RUSH order.
6. Vendor (*click on the magnifying glass to do a detailed search. Tab over **Vendor Name** and type in the name then click **Find.** If you don't know the name but know part of it, enter an * before and after - Ex. *office*. This will bring up all vendors with the word office in it, once you have selected your vendor click **ok***)

7. Add Attachment? (*If you have an attachment to add select this box. The attachment screen will open follow steps on "Adding Attachments At A Glance"*)

7. Freight (*Use **FFA** for* free shipping *or **PPD** for plus shipping*)
8. Comments (*coop name, NB, Registration, etc.*)
9. Notes note pad icon (*any notes to purchasing or vendor. Ex quote number, coupon codes, do not send to vendor, etc.)*
10. Buyer (*person inputting the requisition*)
11. Attention (*this would be the school and staff member that is requesting the items Ex: LPHS/Reagan*)
12. Ship To (*everything will be shipped to the warehouse*)
13. Once complete, click the **ok button** to take you to the **line item** tab.

Fill in the following fields of the "Line Item" tab

14. Shipping charge box (*If checked you will have to enter shipping as the first line item. Shipping may also be added at the end.*)
15. Continuous box (*If checked, it will default with the same account code through out the entire requisition.*)
16. Commodity (*Click the magnifying glass to search, type in the description field Ex: *crafts* this will bring up every commodity with the word craft. Please be specific with these codes. Select the code and click ok once you have found the correct commodity code*)

    DO NOT USE *STOCK NUMBER* FIELD OR *BID ITEM* BOX

17. Fixed Asset Box *(Check only if using 6600's account codes, this will track the items as assets*)
18. Description (*Once a commodity code is selected, a description will automatically appear. You may add additional information such as item # and item description. Five line item limit in this field)*

    Ex: Registration for John Doe CSCOPE conference July 1st-2nd in Austin TX.
    Or item number and description ex. Item#1234 blue pilot pens

CREATING A REQUISITION (continued)

19. Measure
20. Quantity (*how many you are buying*)
21. Unit Price (*the cost of the item, if you are buying 2 pens at 1.99 each, you would put 2 for quantity and 1.99 for unit price*)
22. Extended Amount *(this will automatically be filled in once you enter a unit price and quantity amount)*
23. Discount Percentage (*Enter discount percentage - .05 = 5% discount)*

OR ENTER:

24. Trade/Discount *(the dollar amount to be taken off total if applicable Ex: -5.00 for a $5.00 discount)*
25. Shipping (*this will be grayed out if you have clicked the shipping charge box at the top, see #14. You may enter your shipping as your first line item or last. It will always default to line 99*)

DO NOT USE TAX TOTAL

26. Total Price (*automatically calculated*)
27. Distribution method (*you will use amount/percentage/quantity if you need to split this line item between two account codes, you can enter up to 30 different accounts per line item. If nothing needs to be split you can leave it on amount. hit enter or ok to drop you down to the budget code field*)
28. Budget Code (*click on the looking glass to search*)
29. Account (*click on looking glass to do a search*)

DO NOT USE PROJECT OR THE SECOND ACCOUNT FIELD

30. Percentage (*required only if distributing money between account - enter the % to be distributed to that account. It will automatically calculate the remainder and prompt you to put in a budget code and account for the remaining balance.)*
31. Amount (*required only if distributing money between account - enter the amount to be distributed to that account. It will automatically calculate the remainder and prompt you to put in a budget code and account for the remaining balance.)*
32. If you need to enter another line item click **ok and repeat steps 12-26**. If you are done with the requisition click **ok then save** and you will be out of this requisition. (*If the continuous box was checked, it will automatically pop up with a new requisition number. If you do not wish to enter another requisition and one pops up click the* ***back button*** *to get out of it.)*

Helpful Hints

- If you hover over any field an *information box* will appear with instructions on what to enter.
- Hit the *back button* if you need to get out of a screen.
- Click *save* to save anything other wise it will be lost by clicking the back button.
- Clicking *ok* does not save a requisition you have to click *save*.
- To *change* an item highlight the line you wish to change, click ok and make change
- To *delete* an item select detail items, highlight the line you wish to delete and click delete line item.
- You can *split money per line* item as you are entering them not per entire requisition.
- *Notes* at the top of a requisition can be added for additional information.
- Click on the *looking glass* to do a more detailed search in a field.
- You can also see all your requisition that have been enter for the year, by doing the same steps at the beginning of this page. But instead of clicking the new button, click on find and it will show all Reqs.
- To lookup a *vendor* independently of any other task, select *Purchasing, Reference Tables* and *Vendor List*

- Once a requisition has been created and saved, you can check on the approval status by opening the requisition (highlight the one you want and click "OK" or double click on it), clicking on the "Line Item" tab, and then clicking on "Approval Status" in the header bar. Here you can see if/when your budget manager has approved. Some requisitions require multiple approvals, besides budget manager approval, before they can be processed by Purchasing (ex. anything coded to federal funds or object code 6396). Please check to see if a requisition has all of the prior approvals before contacting Purchasing to check on the status.