


Business Process	Navigation
1. Review and update requisition schedules and enter the requisition distribution.	1. Main Menu > eProcurement > Create Requisition

Use the following navigation to create a requisition.

1. From the Main Menu page, select **eProcurement > Create Requisition**
2. Enter the requisition header information. Details for creating a requisition header are in a separate training quick reference guide titled Enter a Requisition – 1. Define a Requisition.
3. Enter the requisition line information. Details for creating requisition lines are in a separate training quick reference guide titled Enter a Requisitions – 2. Add Items and Services.
4. Click the **Review and Submit** link.

5. Click the  Expand Section icon to display the requisition line's **Shipping Line** (schedule) and the **Accounting Lines** (distribution).

Favorites Main Menu > eProcurement > Create Requisition

### Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 62500 Saint Paul Public Schools \*Currency: USD  
 \*Requester: 500518 Jim Engen Priority: Medium  
 Requisition Name: Quick Reference Guide Req


Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Math for the Consumer - Studen	AMERICAN GUIDANCE SERVICES INC	10.0000	Each	10.99000	109.90
<input type="checkbox"/> Consolidate with other Reqs <input checked="" type="checkbox"/> Override Suggested Vendor						
Shipping Line: 1 Due Date: [ ] Quantity: 10.0000 Price: 10.99000						
Status: Active Ship To: 214095 Attention To: Jim Engen						
*Distribute By: Qty SpeedChart: [ ]						

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open		214095	10.0000	100.0000	109.90	62500

2 Additional textbook materials AMERICAN GUIDANCE SERVICES INC 10.0000 Each 12.95000 129.50

Select All / Deselect All Total Amount: 239.40 USD

Add to Favorites Add to Template(s) Modify Line / Shipping / Accounting Delete

- Enter the date the goods need to be received by in the **Due Date** field. You should check with the vendor first to make sure you know how long it will take to receive the item once it is ordered.
- Most of the **Shipping Line** information will default based on your Requester ID, the requisition lines and requisition defaults. Any of the default values can be adjusted. The **Ship To** determines where the vendor will ship the goods. The **Attention To** will print on the purchase order and should reflect who will receive the goods.
- Use the **Line Details**  icon to access the **Line Details** page. This is an optional step.

Favorites Main Menu > eProcurement > Create Requisition

### Create Requisition

#### Line Details

Line: 1 [Math for the Consumer - Studen](#) Line Status: Pending

**Item Details**


Merchandise Amt: 109.90 USD  
 Category: 71585 [View Hierarchy](#)  
 Description: Textbooks: (Includes Student and Teacher Editions)  
 Buyer:  [Buyer Information](#)  
**Vendor:** 0000001202 [AMERICAN GUIDANCE SERVICES INC](#)  
 Vendor Location: DEFAULT [DEFAULT LOCATION](#)  
 Vendor's Catalog: AMERICAN GUIDANCE SE  
**Vendor Item ID:** 886715407  
 Manufacturer ID:  UPN ID:  
 Manufacturer:  
 Manufacturer's Item ID:   
 Physical Nature: Goods  
 RFQ Required  Zero Price Indicator  **Amount Only**  
 Device Tracking  Inspection Required  
[Configuration Info](#)

**Contract**

**Contract ID:**  [GPO ID:](#)  
 Version:   Use Contract if Available [GPO Contract:](#)  
 Contract Line:   
 Category Line:

**Sourcing Controls**

OK Cancel

9. You may need to add or update the requisition line information.
  - a. From this page, you can add, review or override the **Vendor**.
  - b. The **Vendor Item ID** displays the ISBN # for textbooks ordered using the catalog.
  - c. You will need to select the **Amount Only** checkbox if you are creating a requisition for a fixed price service, variable cost service and materials where you have a quantity of 1 with a flat price. This will allow you to enter multiple invoices against the requisition/purchase order even though the quantity is 1.
  - d. Click the  Expand Section icon in the Contract menu bar to link the requisition to a contract.
  - e. Click **OK** to return to the 3. Review and Submit page.
10. Click on the **ChartFields2** tab in the Accounting Lines section to enter the ChartField distributions.

**Accounting Lines** Personalize | Find | View All | First | 1 of 1 | Last

Chartfields1 **Chartfields2** Details Details 2 Asset Information Asset Information 2

Fund	Dept	Program	Product	Account	Class	Funding Src	PC Bus Unit	Project
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	6460	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

11. ChartField distributions are the budget codes where the requisition should be charged. The **Account** number will always default based on the **Category** code on the requisition line. **Fund** and **Account** are required. At a minimum you will need to enter the **Fund, Dept, Program, Product, Account** and **Class** values in order for the requisition to pass budget checking.

12. If there is more than on requisition line you will need to repeat steps 5 – 11 for all the requisition lines.
13. Click **Save & Submit** when the requisition is completed. The requisition is routed for approval using workflow. If you want to save the requisition without submitting it into the workflow approval process then click **Save & Preview Approvals**.

Business Unit: 62500 Saint Paul Public Schools \*Currency: USD

\*Requester: 500518 Jim Engen Priority: Medium

Requisition Name: Quick Reference Guide Req

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Math for the Consumer - Studen	AMERICAN GUIDANCE SERVICES INC	10.0000	Each	10.99000	109.90
2	Additional textbook materials	AMERICAN GUIDANCE SERVICES INC	10.0000	Each	12.95000	129.50
<b>Total Amount:</b>						239.40 USD

Comments: Send to Vendor, Show at Receipt, Shown at Voucher, Approval Justification, More Comments

Buttons: Save & submit, Save & preview approvals, Cancel requisition, Find more items

14. The Confirmation page displays. The **Requisition ID** is assigned and the requisition is routed to the first approver. The **Budget Status** is 'Not Checked'. The requisition will be budget checked and the pre-encumbrance will be generated after the requisition has an **Approved** status.

Favorites | Main Menu

### Confirmation

Requested For:	Jim Engen	Number of Lines:	2
Requisition Name:	Quick Reference Quice Req	Total Amount:	239.40 USD
Requisition ID:	0000000417		
Business Unit:	62500		
Status:	Pending		
Priority:	Medium		
Budget Status:	Not Checked		

### Requisition Approval

Quick Reference Quice Req: Pending [+ Start New Path](#)

Principal/Admin approver

**Pending**

Marie Schruel  
Principal/Admin approver [+](#)

### Category Code Approvers

Quick Reference Quice Req: Awaiting Further Approvals [+ Start New Path](#)

Category Code Approvers

**Not Routed**

[+](#) Laurie Brazman  
Curriculum/Coach [+](#)

### Accountant Approvals

Quick Reference Quice Req: Awaiting Further Approvals [+ Start New Path](#)

Accountant Approvals

**Not Routed**