9.0 Enter a purchase requisition

Navigation:
Purchasing, Requisitions, Add/Update Requisitions, Add

1.) On the Maintain Requisition page click Requisition Defaults

Note to users who change the default requester: Click the search icon on the Requester field to select from the list, or type in the user Id. The following message indicates the values that will default based on the requester change.

Changing Requester will change the default settings:
- ShipTo ID to 070_100
- Location Code to 070_100
- General Ledger Unit to SLOMP
- Department to 127900
- Retrofit to existing items? (10150,147)

Changing Requester will change the default setting like ShipTo ID, Location, Department ID, Account and other Charfields. Click 'Yes' to retrofitt the default values from Requester to the existing lines? Click 'No' to change only the default setting. Click Cancel to reset the Requestor to the previous value.

Updated on 8/19/2008
2.) Leave **Buyer:** blank. The buyer will be automatically assigned based on the category code.

3.) Enter your **Vendor ID** in the **Vendor field**, or click [Vendor Lookup] to search.

### Requisition Defaults

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>SLCMP</th>
<th>Requisition Date</th>
<th>08/21/2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition ID</td>
<td>NEXT</td>
<td>Status</td>
<td>Open</td>
</tr>
</tbody>
</table>

#### Default Options

- **Default:** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

- **Override:** If you select this option, all default values entered on this page override the default values found in the default hierarchy.

### Line

<table>
<thead>
<tr>
<th>Buyer:</th>
<th>[Search]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor:</td>
<td>[Search]</td>
</tr>
<tr>
<td>Category:</td>
<td>[Search]</td>
</tr>
</tbody>
</table>

### Schedule

- **Unit of Measure:** [Search]
- **Vendor Location:** [Vendor Lookup]

4.) Type in the first few letters of the **Vendor Name** in the **Name field** and click [Search]

5.) To select your vendor, click the appropriate check box and click **Ok**.
6.) If you do not locate your vendor, click OK and enter 0000000001 in the Vendor field on the Header Defaults page. Do not leave this field blank. Note: You could also look up the Vendor Code by opening a second window and go to Vendor Look-up.

7.) Select a Category by using the magnifying glass to search for the appropriate Category, or type in the Category value.

- When using the Category Search, click the Description column header to alphabetize the list of categories.
- Click View All to see the entire list. Select the appropriate value.
The Category Id will automatically select the corresponding Account Code on the Distribution line. For example 660003 (General Supplies & Services) corresponds with category Id 61500 (Office Supplies). If your Requisition has multiple lines with various Categories, you can leave the field blank here and select it on each line, if you prefer.

8.) Select a Unit of Measurement by using the magnify glass.

9.) Populate Due Date: by clicking on the calendar icon to select a date. The date should be when you want the product delivered to campus. Do not leave this field blank.

NOTES:
- Do not change the Distribute by: field on this page. Enter split distribution on the distribution lines of the requisition.

10.) Populate the Fund number and if necessary, Program, Class and Project. As stated earlier, leave the Account field blank. 11.) Click OK.
Requisition. They can be overridden if necessary.

**Note:**
If you return to this page (Requisition Defaults) to make a change, you will be asked if you want the change to appear throughout the Requisition. Click **Mark All** and **OK**.

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Requisition Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLCMF</td>
<td>08/04/2008</td>
<td>Open</td>
</tr>
</tbody>
</table>

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.

For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.

Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.
Select 'Apply to All Distrib' to apply changes to all distribution lines on the requisition.

11.) On the Maintain Requisition page enter product, item code first followed by the description. If can click the line details icon to view the full description field.

12.) Enter the Qty

13.) Enter the Price
14.) Click **Refresh** for the UOM and Category ID to default on Line 1 if you have entered them on the Requisition Defaults page, otherwise enter them on the line.

15.) For additional lines on the Req click **+** and enter the number of lines you need to add. Follow steps 12-15.

16.) For each line of the requisition there is a schedule. The schedule is where you can review the chart field strings. If there are multiple lines on the requisition, click **View All** to see all schedules on one page.

17.) To verify the chartfield for each schedule

   Click the distribution icon **** which is located to the right of the due date.

18.) Verify or change Chartfield here if appropriate and click **OK**. Once you select OK, you will go back to the Schedule
Enter a purchase requisition
9.0 Step by Step Guide

Page.

19.) Then select Return to Main Page

20.) Click Add Comments to enter comments to the Buyer. Comments may include Vendor contact information, comments regarding back-up or rush orders. If you use the Print Requisition feature, check Send to Vendor, so the comments will display on the printed copy. The comments will not be sent to the vendor. Spell check you comments by clicking.

Header Comments

Business Unit: SLCMP
Requisition ID: SLCMP-503
Requisition Date: 07/11/2008
Status: Open

Sort Method: Comment Time Stamp
Sort Sequence: Ascending

Comments

Copy Standard Comments

Comment Status: Active

Back Up In Campus Mail
Please Expedite

Send to Vendor

Shown at Receipt

Shown at Voucher

Associated Document

Attachment

Attach View Delete

From -> REQ SLCMP-503

KO
Cancel
Refresh

21.) Click OK and Save

Updated on 8/19/2008
22.) Once a requisition number is assigned

Maintain Requisitions

Requisition

Business Unit: SLCMF
Requisition ID: 2007100386

Status: Open
Budget Status: Not Chked

Hold From Further Processing

23.) If you are the approver, approve by clicking otherwise, put the requisition on hold by selecting the Hold from Further Processing and notify your approver of the requisition ID.

Otherwise after approving, run Budget Check by clicking

Maintain Requisitions

Requisition

Business Unit: SLCMF
Requisition ID: 2007100386

Status: Open
Budget Status: Not Chked

Hold From Further Processing
25.) Verify status and budget status before leaving the page

Status: Approved
Budget Status: Valid

NOTE: Budget Check process will be run nightly. If the requisition is in Approved status it will be Budget Checked, unless the Hold from Further Processing box has been selected.

Please make sure to send your backup (quotes, pricing, sole source justification and any other information to the Contracts, Procurement, and Risk Management office in order for your requisition to be processed into a purchase order.