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 127000

Retool to existing lines? (10150,147)

Changing Requester will change the default setting like ShipTo ID, Location, Department ID, Account and other fields. Click 'Yes' to retrofit 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.

Yes  No  Cancel
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.

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 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

*The Chartfields entered here will default on each line of the requisition.
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**.

Business Unit: SLCMF  
Requisition Date: 08/04/2008  
Requisition ID: NEXT  
Status: Open

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.

**Apply** | **Distrib Line** | **Field Name** | **Field Value** | **Apply to All Distrib**
---|---|---|---|---
0 | Vendor | | 0000000127 | 
1 | Category | | 49500 | 
0 | Unit of Measure | | BOX | 
0 | Vendor Location | | MAIN | 

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.
19.) Then select [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 your comments by clicking [OK] and [Save].

**Header Comments**

<table>
<thead>
<tr>
<th>Business Unit:</th>
<th>SLCM</th>
<th>Requisition Date:</th>
<th>07/11/2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition ID:</td>
<td>NEXT</td>
<td>Status:</td>
<td>Open</td>
</tr>
</tbody>
</table>

**Sort Method:** [Comment Time Stamp]  
**Sort Sequence:** [Ascending]  
**Sort:** [Sort]

**Comments**

- **Copy Standard Comments**: 
- **Comment Status**: [Active]  
- **Inactive**: [Inactivate]

- [Send to Vendor]  
- [Shown at Receipt]  
- [Shown at Voucher]

**Associated Document**

<table>
<thead>
<tr>
<th>Attachment</th>
<th>Attach</th>
<th>View</th>
<th>Delete</th>
<th>Email</th>
</tr>
</thead>
</table>

From => REQ SLCM-NEXT

[OK]  
[Cancel]  
[Refresh]

**21.) Click [OK] and [Save]**

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Enter a purchase requisition

9.0 Step by Step Guide

22.) Once a requisition number is assigned

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

24.) Click

Update on 8/19/2008
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.