ABC 2016 Fall Summit

Requisition Training

*Procurement Services*

September 7, 2016

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**Agenda**

- Definitions
- Planning
- Req to Check
- PeopleSoft Financials - Requisitions
  - Tips and Tricks
Definitions

- **Requisition**
  - A request from a department to Procurement Services to purchase a good/services on their behalf.
  - Not a binding agreement, nor obligated or “encumbered” funds

- **Purchase Order**
  - A binding agreement between the University and the supplier.
  - Delegated authority by the President to the Procurement Specialist only.
Planning

- Plan with Procure to Pay Team – single point of contact
- Early Procurement Plan (EPP)
- Quarterly Meetings with Procure to Pay Team

Requisition to Check Process

- **Requestor** enters requisition into PeopleSoft Financials
- **Approving** official reviews and budget checks requisition
- **Procurement** reviews requisition and assigns to a Procurement Specialist, creates a purchase order number.
- **Procurement Specialist** begins the review/approval process
Requisition to Check Process

- **Procurement Specialist** issues purchase order to supplier
- **Requestor** receives email notification of purchase order from PeopleSoft Financials
- **Supplier** ships the goods/provides services
- **Requestor** receives invoices, reviews invoice for accuracy, approves invoices, sends to Payment Services.

Req Tip-Tricks

- **Use Saved Search** – ability to identify approved, open, closed requisitions
- **Requisition Status** – open and approved
- **Requestor Name** – assists approving officials
- **Add New Value** – Copy from function
Req Tips-Tricks Homepage

- **6 Steps to Create a Requisition** -
  - Navigation - Main menu, purchasing, requisitions, add new value, default requisitions hyperlink (note first time users personalize page)
  - Enter supplier (when to use No Vendor)
  - Enter Procurement Specialist per your Procure to Pay Team
  - Category
  - Unit of Measure
  - Distribution – chart of accounts
  - Click ok, mark all, ok
  - Enter line details – minimum quantity and price
  - Click Save – requisition is created number assigned
**Requisition Tips-Tricks**

- **Personalization** — hides and rearrange fields
- **Review Requisition Inquiry** — identify PO# and Buyer
- **Purchase order Inquiry** — Status of PO
- **Activity Summary** — Amounts on each PO line, voucher review
Thank you

We appreciate the opportunity to support your operations and to help advance our greater institutional goals

GO MUSTANGS!

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