

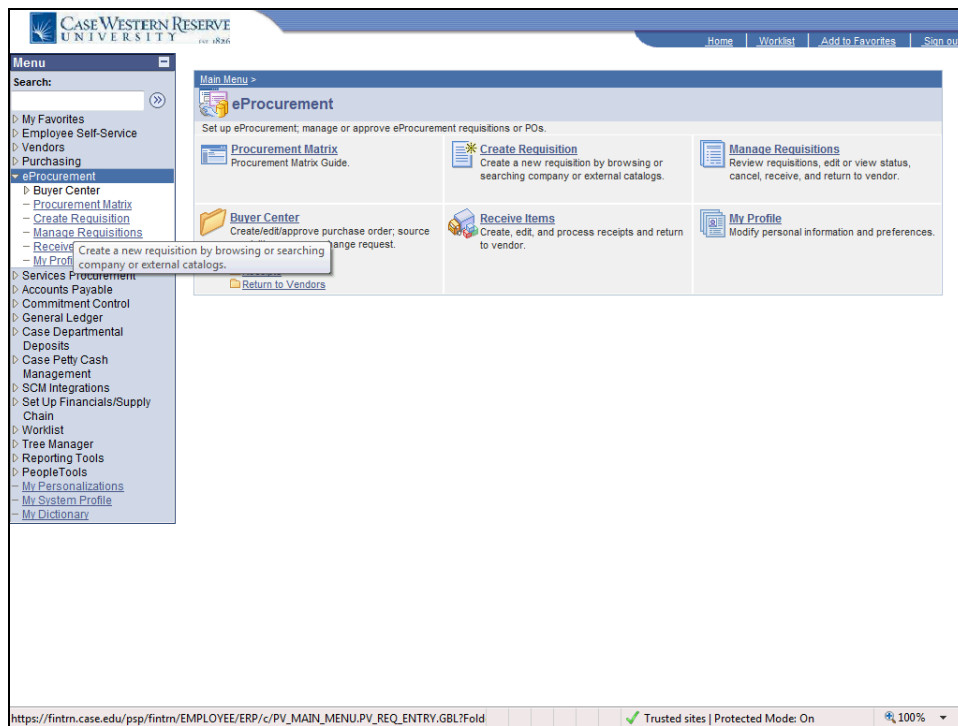
## Creating a Requisition

### Concept

This guide will demonstrate how to enter a Purchase Requisition. It will also demonstrate how to view the status and approvals of your requisition.

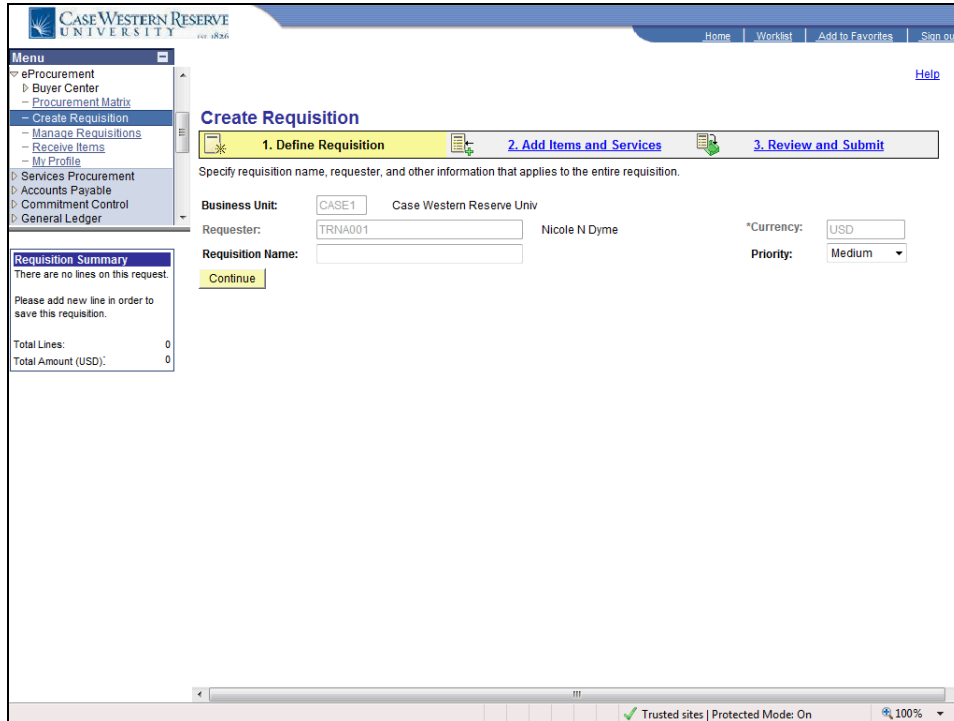
### Procedure

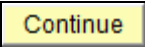
Log into the Financials database using your Case ID and password.

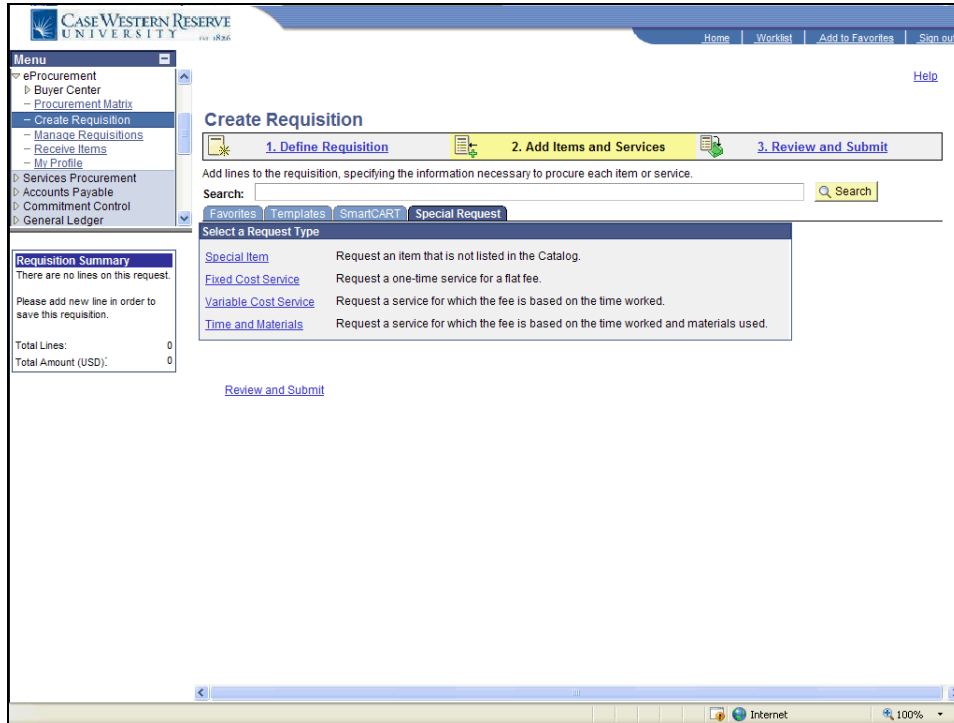


Step	Action
1.	From the left-hand Menu, Click the <b>eProcurement</b> link, then <b>Create Requisition</b> , or click the <b>Create Requisition</b> link in the center Menu.

# Creating a Requisition

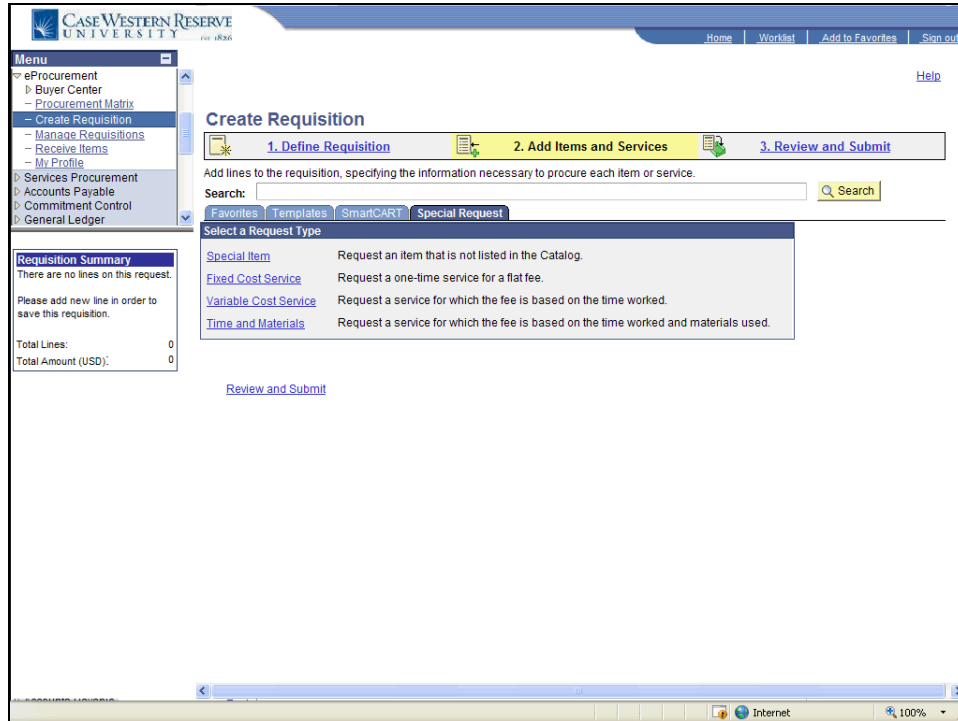


Step	Action
2.	The <b>Create Requisition</b> screen appears.
3.	The <b>Requisition Summary</b> box appears on the left-hand side under the Menu. This is where you will see the line items, Total Lines, and Total Amount of your Requisition as you create your Requisition.
4.	Note the 3 steps to complete and submit a requisition are identified at the top of the screen. <b>1. Define Requisition</b> <b>2. Add Items and Services</b> <b>3. Review and Submit</b>
5.	The <b>Business Unit</b> defaults to <b>CASE1</b> . The <b>Requestor</b> field defaults to your Case Network ID. Your name will show next to this field.
6.	Enter a name for your requisition in the <b>Requisition Name</b> field. For example, enter " <b>Requisition 3</b> ". The <b>Requisition Name</b> field is optional, if you do not enter a name the name will default the the Requisition number.  Entering a name for your requisition will make it easier to search for requisitions. If you do not make an entry, the Requisition number will be used.
7.	Click the <b>Continue</b> button. 

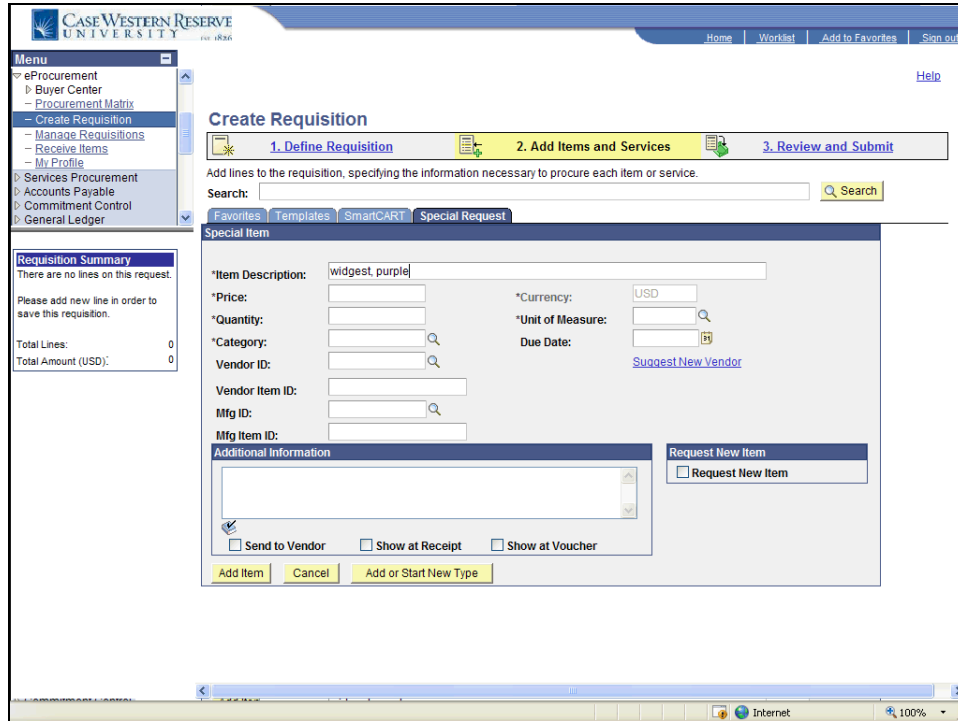



Step	Action
8.	<p>The <b>Add Items and Services</b> screen will appear. Note the tabs on the page. Click the <b>Special Request</b> tab.</p> <p><b>Templates</b> allows you to retrieve any templates you have saved.</p> <p><b>SmartCart</b> will allow you to access the catalogs available (coming May 10).</p> <p><b>Special Request</b> is where you will enter your requisition for goods not in catalogs.</p>

# Creating a Requisition

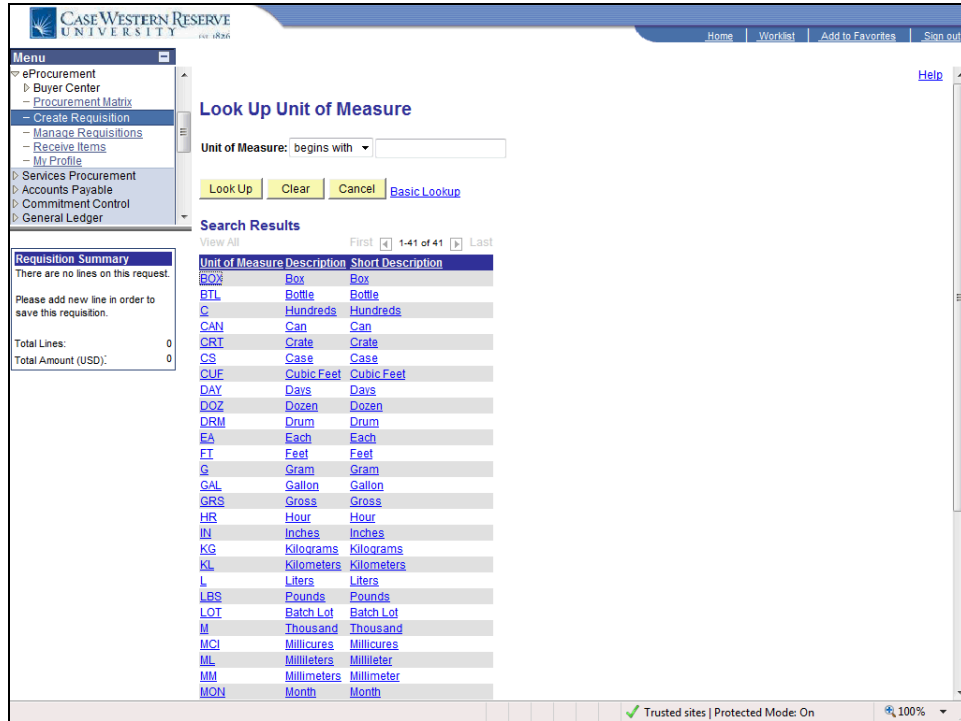



Step	Action
9.	The Select a Request Type screen appears.  Click the <b>Special Item</b> link. <a href="#">Special Item</a>

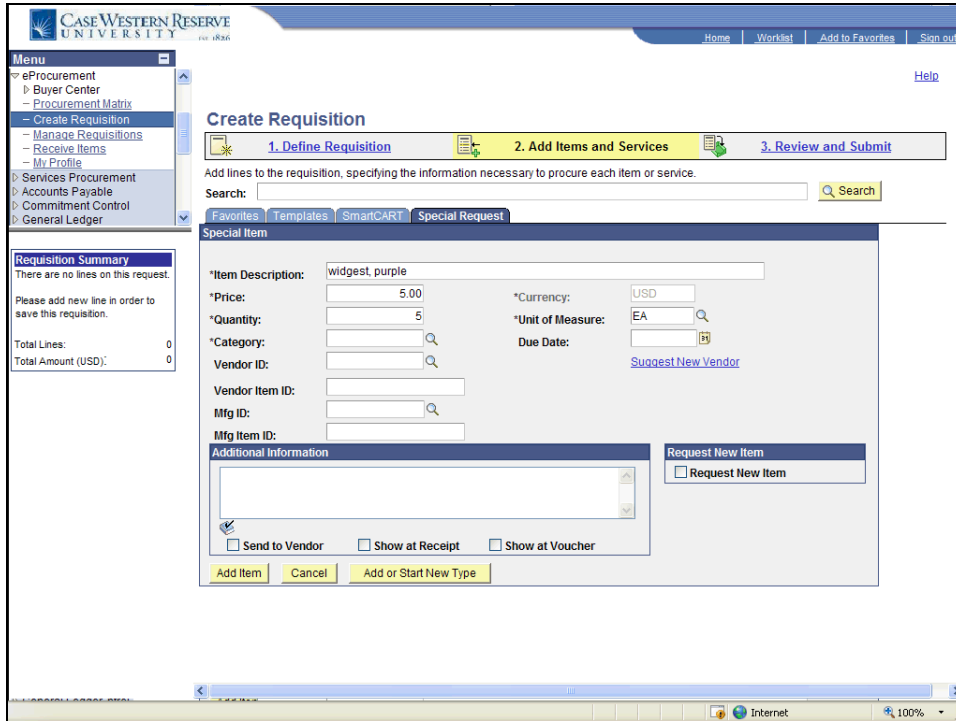



Step	Action
10.	<p>The Special Item screen appears where you will enter details about the item you wish to purchase.</p> <p>Enter what you are purchasing in the <b>Item Description</b> field. For example "<b>widgest, purple</b>".</p> <p>The description must include the catalog number, description, size and color (if applicable).</p>
11.	<p>Enter the price per unit of measure for the item into the <b>Price</b> field. For example, enter "<b>5.00</b>".</p>
12.	<p>Enter the total number of items you are purchasing into the <b>Quantity</b> field. For example, enter "<b>5</b>".</p>
13.	<p>Enter the Unit of Measure for the item. To see all the <b>Unit(s) of Measure</b> click the <b>Look up icon</b> and choose the correct unit.</p> 

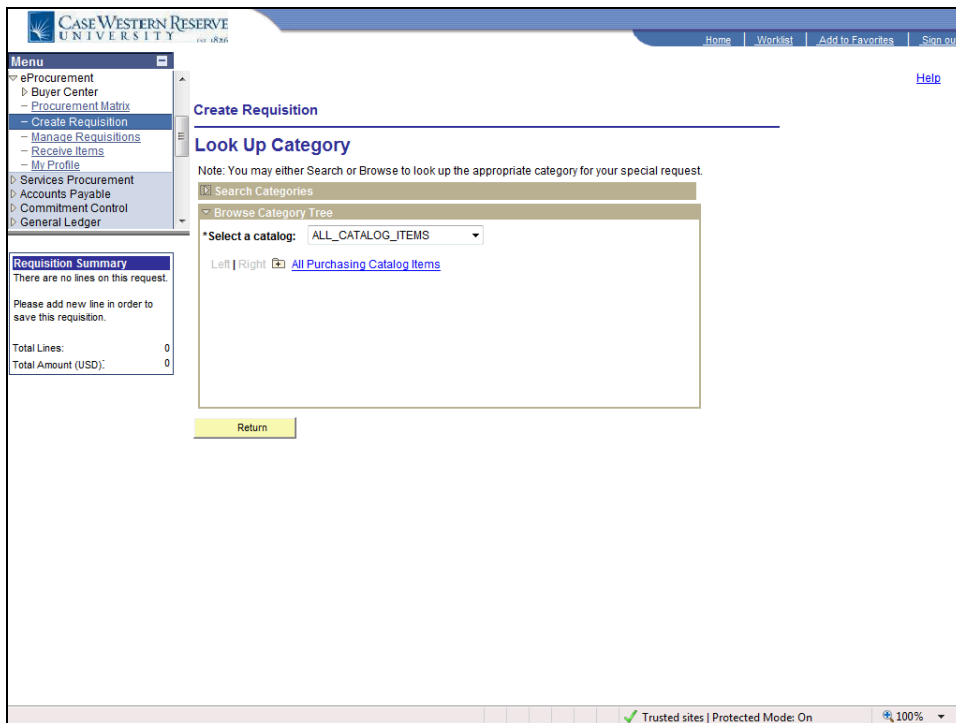
# Creating a Requisition




Step	Action
14.	The Look Up Unit of Measure page appears.  Note the <b>LOT</b> Unit of Measure, this will be used to for blanket requisitions or to upfund a purchase order.
15.	Most of the time items will use the <b>Each</b> Unit of Measure Click the <b>EA</b> link. 

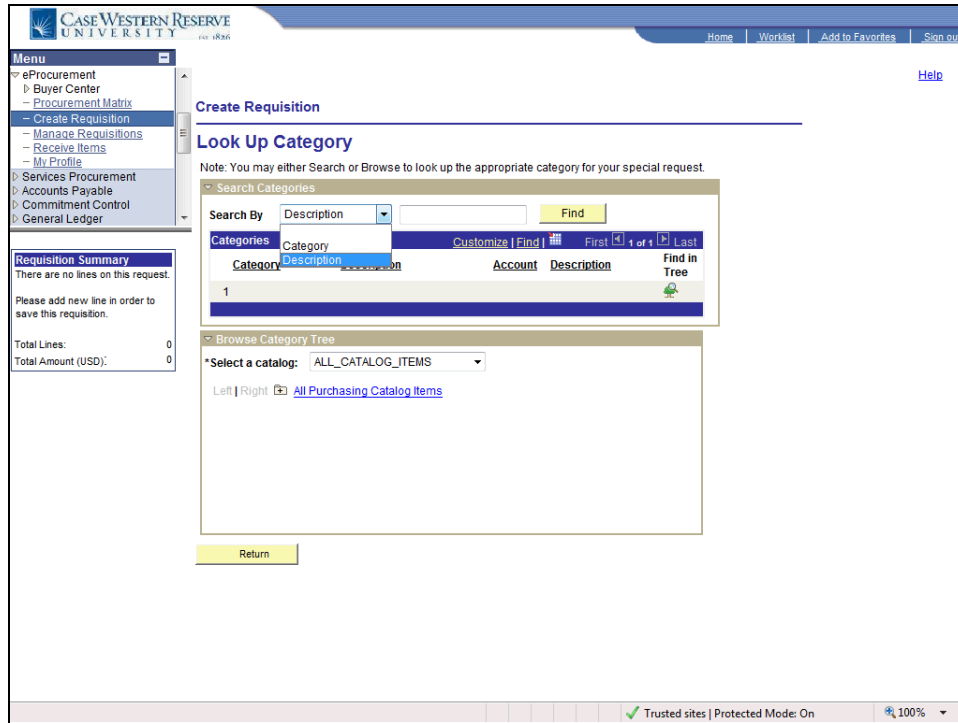


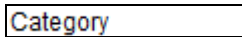
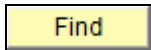
Step	Action
16.	Click the <b>Category Lookup</b> icon to choose the correct category for your purchase. 



# Creating a Requisition

Step	Action
17.	<p>The Look Up Category page appears.</p> <p>Click the <b>Expand section</b> button next to the name <b>Search Categories</b>.</p> 



Step	Action
18.	<p>To search by Category name, click the <b>Category</b> list item in the Search by dropdown box.</p> 
19.	<p>To see all categories, click the <b>Find</b> button. Enter a keyword in the box to narrow the search.</p> 

**Create Requisition**

**Look Up Category**

Note: You may either Search or Browse to look up the appropriate category for your special request.

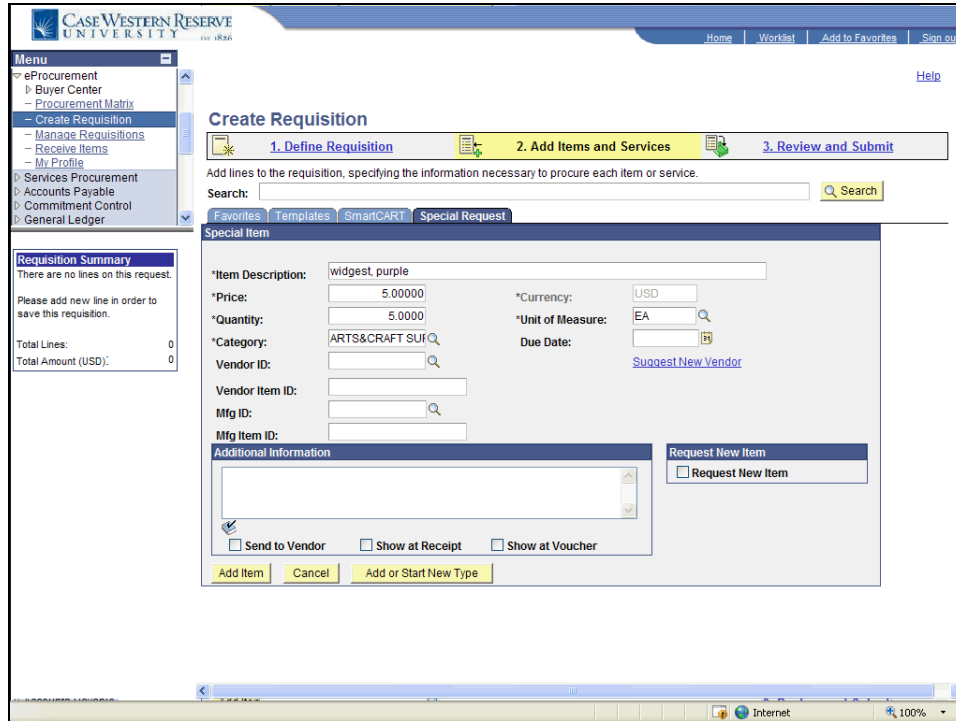
Search Categories


Search By: Category


Category	Description	Account	Description	Find in Tree
1 ANIMAL FACILITIES	Animal Facilities	532700	Animal Facilities	
2 ANIMAL RES CENTER	Animals, Lab, Farm, and Other	531140	A F Animal Purchases	
3 ARTSCRAFT SUPPLIE	Art Supplies, Clay, Paint, Brushes	531200	Lab Inst & Res Supplies	
4 ATHLETIC SUPPLIES	Athletic Recreation/Sporting	531260	Minor Expendable Equipment	
5 AUDIO VIDEO SERVIC	Video Productions Services	531260	Minor Expendable Equipment	
6 AUDIO VISUAL SUPPL	Audio Visual Parts & Supplies	531260	Minor Expendable Equipment	
7 AUXILIARY SUBSIDY	Auxiliary Subsidy	531400	Food Supplies	
8 AUXILIARY TRANSFER	Auxiliary Transfer	530990	Unknown Expense Class Default	
9 BENEFIT SERVICE	Benefit Services	530990	Unknown Expense Class Default	
10 CATERING OFF CAMPU	Catering Off Site	531400	Food Supplies	
11 CATERING ON CAMPUS	Catering On Site	531400	Food Supplies	
12 CHEM RESEARCH	Chemicals, Research & Scientific	531200	Lab Inst & Res Supplies	
13 COFFEE SERVICE	Coffee Service	531400	Food Supplies	
14 COMP EQUIP < \$5000	Computer Hardware < \$5000	593990	Error A/C	
15 COMP EQUIP >	Computer Hardware > \$5000	593990	Error A/C	


Step	Action
20.	<p>A list of all the University categories appears. Notice the Account number is now associated with the category.</p> <p>Click the name of the <b>Category</b> link.</p> <p>For example, click <b>ARTSCRAFT SUPPLIE</b></p> <div style="border: 1px solid black; padding: 2px; display: inline-block;"> <p>3 <a href="#">ARTSCRAFT SUPPLIE</a></p> </div>

# Creating a Requisition

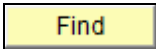


Step	Action
21.	<p>The Special Item page returns. Enter the date you need the item in the <b>Due Date</b> field or use the calendar icon to choose the date.</p> <p>To select a due date using the calendar icon, click the <b>Calendar</b> button. A calendar will pop open, choose a date from the Calendar popup by clicking on the number. The Due Date field will automatically place the date clicked into the field.</p> 

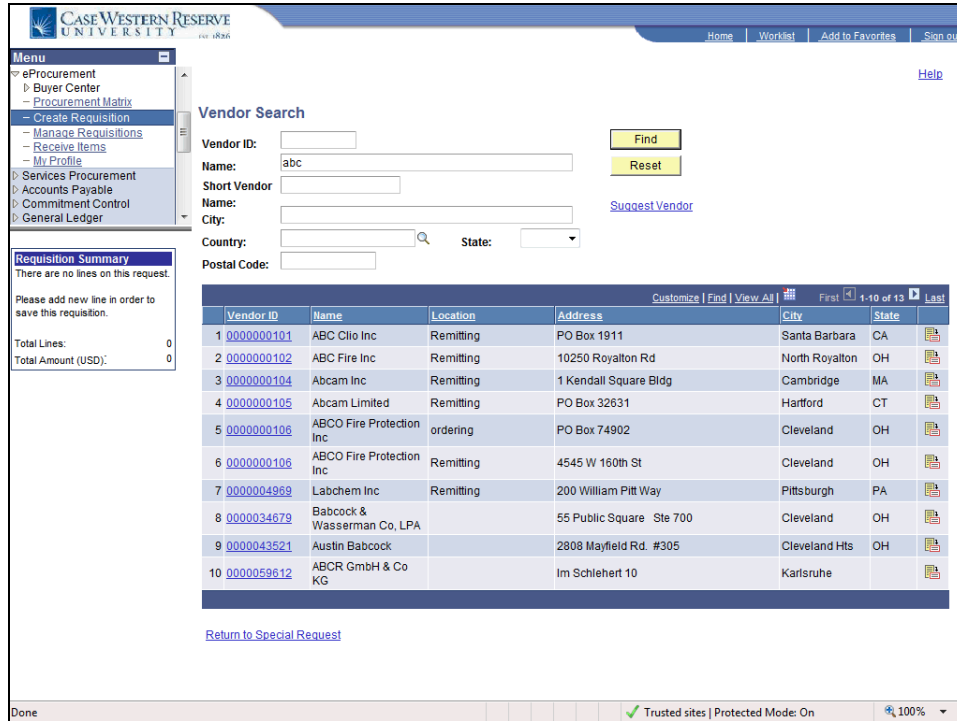
 Note: Buyers do not see due dates until they open your requisition Note: Buyers do not see due dates until they open your requisition on their Worklist. If the item is needed sooner than a week, please note in the comments and contact Purchasing.

Step	Action
22.	<p>To search for a vendor, next to the Vendor ID: field is the <b>Vendor Lookup</b> icon. Click the <b>Vendor Lookup</b> icon.</p> 

The screenshot shows the 'Vendor Search' interface. On the left is a 'Menu' with options like 'eProcurement', 'Buyer Center', 'Procurement Matrix', 'Create Requisition', 'Manage Requisitions', 'Receive Items', 'My Profile', 'Services Procurement', 'Accounts Payable', 'Commitment Control', and 'General Ledger'. Below the menu is a 'Requisition Summary' box indicating 'There are no lines on this request.' and 'Please add new line in order to save this requisition.' with 'Total Lines: 0' and 'Total Amount (USD): 0'. The main 'Vendor Search' area contains fields for 'Vendor ID', 'Name', 'Short Vendor Name', 'City', 'Country', and 'Postal Code', along with 'Find' and 'Reset' buttons. A 'Suggest Vendor' link is also present. A message at the bottom of the search section reads 'Enter search criteria to find a vendor.' with a 'Return to Special Request' link. The browser status bar at the bottom shows 'Done', 'Trusted sites | Protected Mode: On', and '100%' zoom.

Step	Action
23.	The Vendor Search page appears.  Enter a partial search in the <b>Name</b> field. The less you enter the better your search results. For example, enter " <b>abc</b> ".
24.	Click the <b>Find</b> button. 

# Creating a Requisition




**Vendor Search**

Vendor ID:   
 Name:   
 Short Vendor Name:   
 City:   
 Country:  State:   
 Postal Code:

[Find](#) [Reset](#) [Suggest Vendor](#)

Vendor ID	Name	Location	Address	City	State
<a href="#">1 0000000101</a>	ABC Clio Inc	Remitting	PO Box 1911	Santa Barbara	CA
<a href="#">2 0000000102</a>	ABC Fire Inc	Remitting	10250 Royalton Rd	North Royalton	OH
<a href="#">3 0000000104</a>	Abcam Inc	Remitting	1 Kendall Square Bldg	Cambridge	MA
<a href="#">4 0000000105</a>	Abcam Limited	Remitting	PO Box 32631	Hartford	CT
<a href="#">5 0000000106</a>	ABCO Fire Protection Inc	ordering	PO Box 74902	Cleveland	OH
<a href="#">6 0000000106</a>	ABCO Fire Protection Inc	Remitting	4545 W 160th St	Cleveland	OH
<a href="#">7 0000004969</a>	Labchem Inc	Remitting	200 William Pitt Way	Pittsburgh	PA
<a href="#">8 0000034679</a>	Babcock & Wasserman Co, LPA		55 Public Square Ste 700	Cleveland	OH
<a href="#">9 0000043521</a>	Austin Babcock		2808 Mayfield Rd. #305	Cleveland Hts	OH
<a href="#">10 0000059612</a>	ABCR GmbH & Co KG		Im Schliehert 10	Karlsruhe	

[Return to Special Request](#)

Step	Action
25.	A list of Vendors appears containing your search criteria. To select a vendor, click the <b>Vendor ID</b> number link for that vendor.
26.	To see information about a vendor, click the <b>Vendor Detail</b> button. 

**Vendor Lookup Details**

SetID: CASE1 Vendor ID: 0000004969  Search [Return to Special Request](#)

**Vendor Detail**

ShortName: LABCHEM-001 Status: Approved  
 Name 1: Labchem Inc Class: Supplier  
 Name 2: HR Class:  
 Address: 00001 Remitting Persistence: Regular  
 Dflt Loc: REMIT Remitting  
 Corporate Vendor: CASE1 0000004969 Labchem Inc  
 Remit Vendor: CASE1 0000004969 Labchem Inc  
 Open For Ordering  Withholding Applicable  VAT Applicable

Vendor Types [Find](#) | [View All](#) | First  Last

Step	Action
27.	The Vendor Lookup Details page appears.

**Vendor Lookup Details**

**Create Requisition**

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

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

**Special Item**

\*Item Description: widget, purple  
 \*Price: 5.00000 \*Currency: USD  
 \*Quantity: 5.00000 \*Unit of Measure: EA  
 \*Category: ARTS&CRAFT SUF Due Date: 02/26/2010  
 Vendor ID: 0000004969 Labchem Inc [Suggest New Vendor](#)  
 Vendor Item ID:   
 Mfg ID:   
 Mfg Item ID:


**Additional Information**

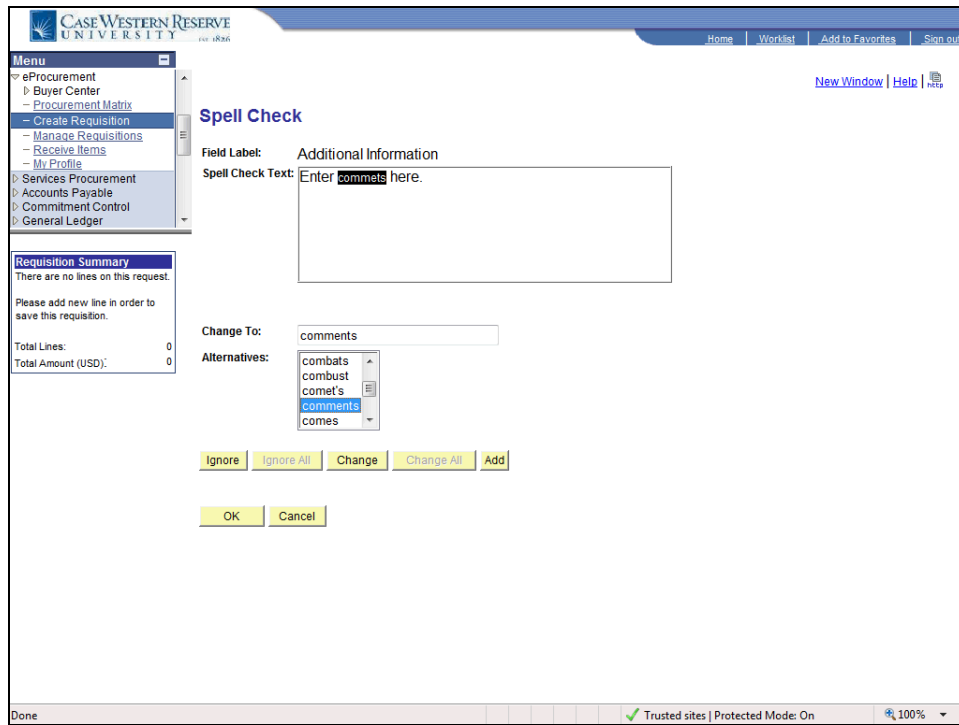
Send to Vendor  Show at Receipt  Show at Voucher

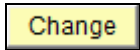
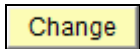
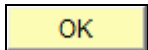
**Request New Item**

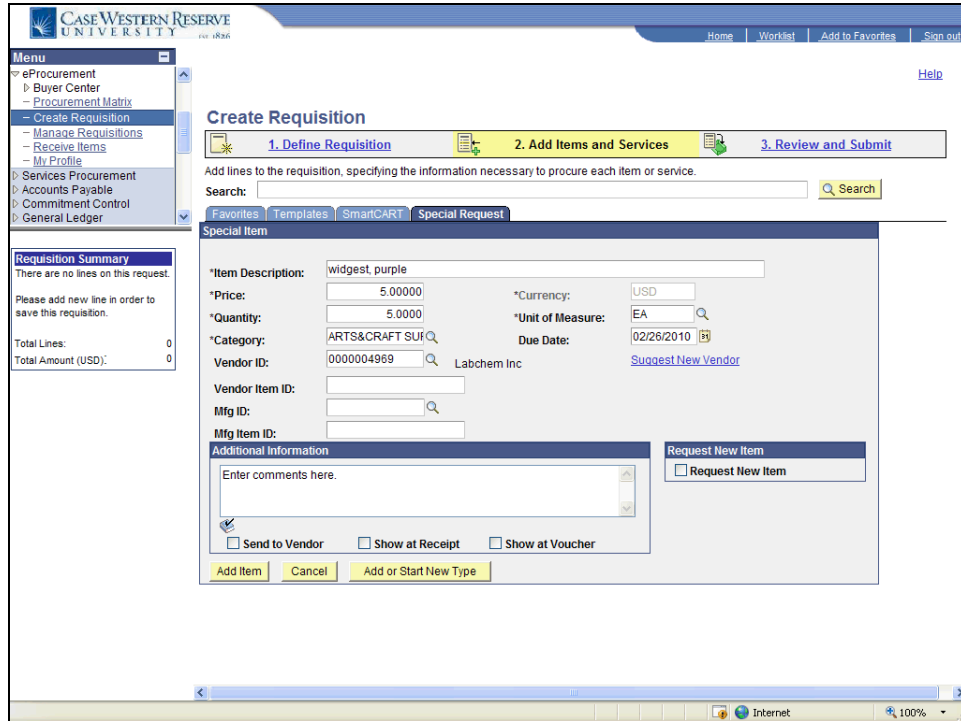
Request New Item

# Creating a Requisition

Step	Action
28.	To add comments about your entire requisition, enter them into the <b>Additional Information</b> box. To enter important comments for the buyer or approver, we will do that later on the payment and shipping area.
29.	To spell check your entry, click the <b>Spell Check icon</b> if desired. 

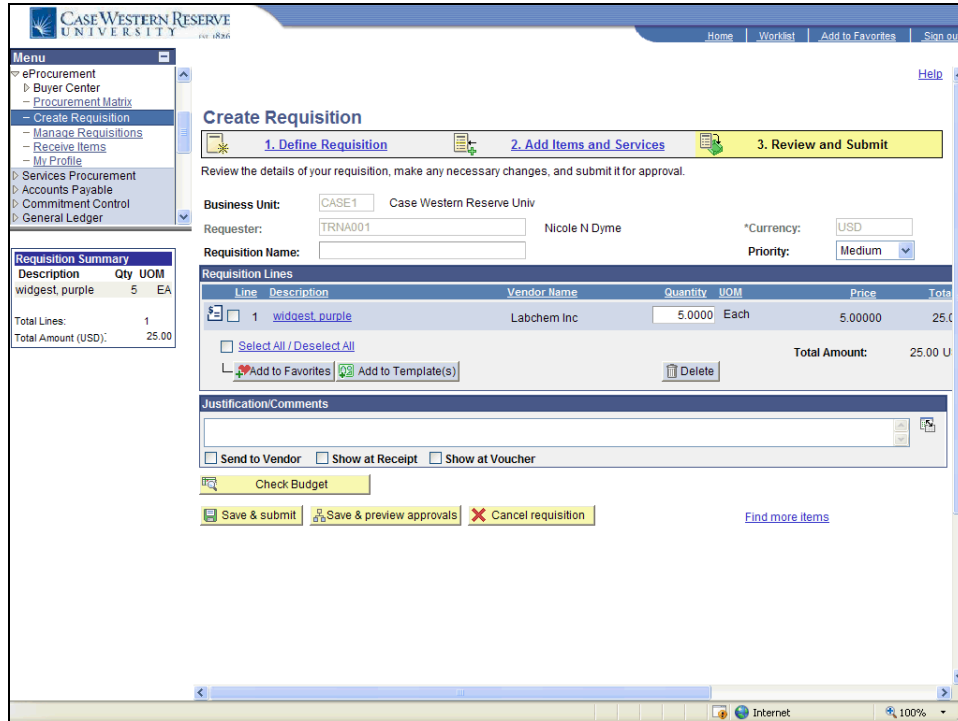



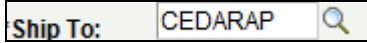
Step	Action
30.	If Spell Check finds a misspelled word it will show options similar to spell check in a word processor. Click the <b>word you want to change to</b> from the list.  Click the <b>Change</b> button. 
31.	Click the <b>Change</b> button. 
32.	Click the <b>OK</b> button. 



Step	Action
33.	<p>You are returned to the Special Item screen.</p> <p>To add the item to your Requisition, click the <b>Add Item</b> button.</p> <p><b>Add Item</b></p>
34.	<p>To finish your requisition, click the <b>3. Review and Submit</b> link.</p> <p><b>3. Review and Submit</b></p>

# Creating a Requisition

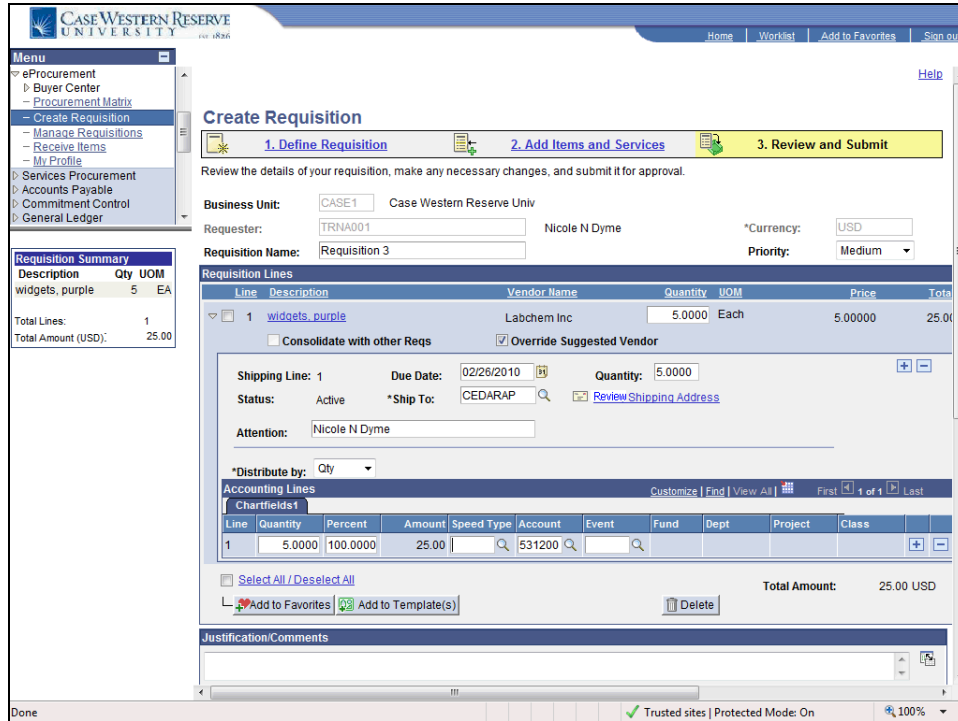


Step	Action
35.	<p>The requisition Lines page appears. A list of all the items you have purchased will appear here.</p> <p>In addition, the Requisition Summary box to the left will be populated with your items.</p> <p>To attach information to your Requisition, scroll to the right and click on the comment bubble. The Add Attachment screen will open as in the previous version.</p>
36.	<p>To enter shipping and payment information Click the <b>Expand Section</b> button to the left of each item.</p> 
37.	<p>The <b>Ship To</b> field will populate with your ID and will be associated with the location on your security form.</p> <p>If you want the items to be shipped to another person (who is in the Financials system) or another location, click the magnifying glass to see codes for those locations/persons.</p> <p><b>NOTE:</b> To change your location, submit a security form with the new location.</p> 
38.	<p>Click the <b>Review Shipping Address</b> link to view the actual address associated with the Ship to code that has been entered. No changes can be made to the address, this is a view only screen.</p> <p><a href="#">Review Shipping Address</a></p>

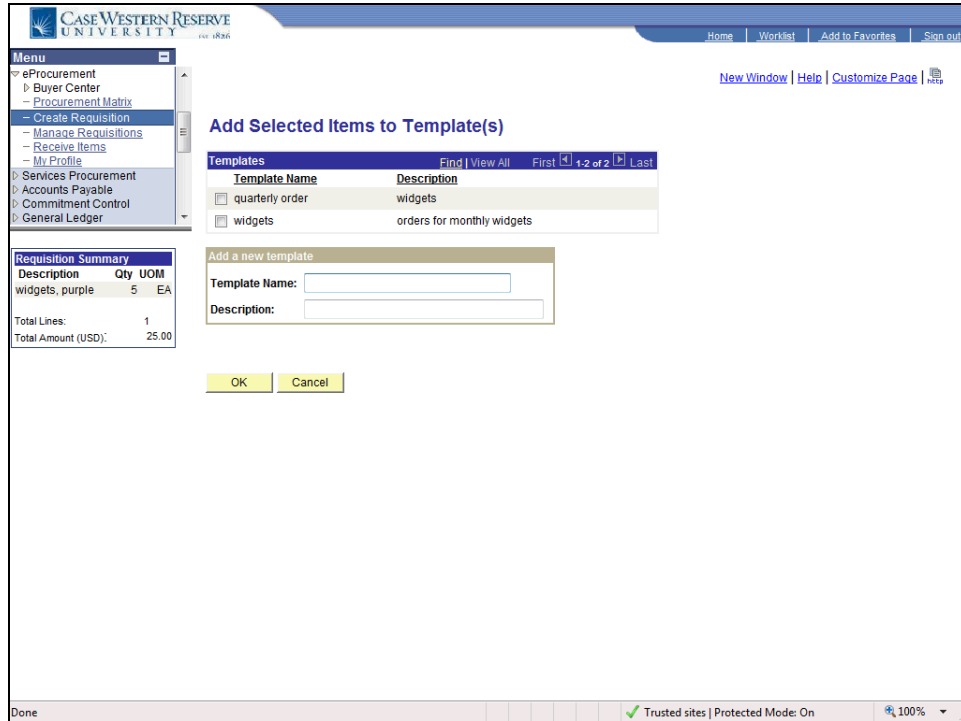
Step	Action
39.	Enter Payment information in the same area as shipping. To change the Accounting Distribution, click the <b>Distribute by</b> dropdown and choose Qty or Amt. Qty

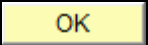
Step	Action
40.	Click the <b>Amt</b> list item. Amt

# Creating a Requisition

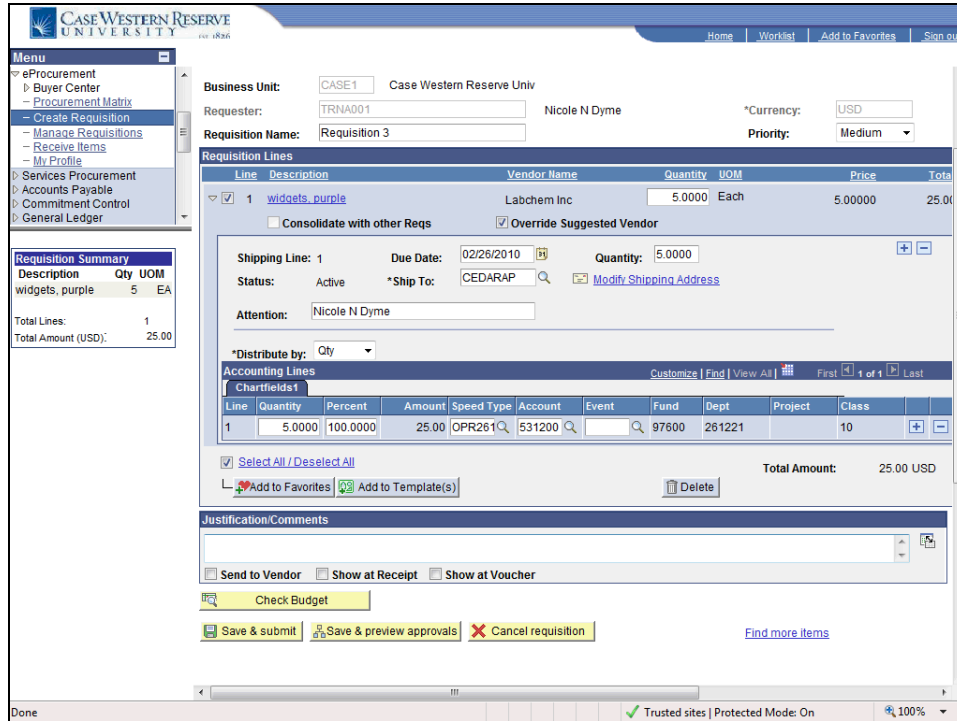


Step	Action
41.	Enter the Speed Type into the <b>Speed Type</b> field. For example, enter " <b>OPR261221</b> ".
42.	The Account field will default to the account associated with the Category you chose when creating your Requisition.
43.	To add this to your Templates list, click the checkbox next to the item. <input type="checkbox"/>
44.	Click the <b>Add to Template(s)</b> button. <input type="button" value="Add to Template(s)"/>




Step	Action
45.	The <b>Add Selected Items to Template(s)</b> page appears.  Enter the desired information into the <b>Template Name</b> field. For example, enter " <b>my order</b> ".
46.	Enter a description of your template in the <b>Description</b> field. For example, enter " <b>training dept</b> ".
47.	After you have created templates you can search for the template by clicking on the Template tab when you start your requisition. When you are finished, click the <b>OK</b> button.  

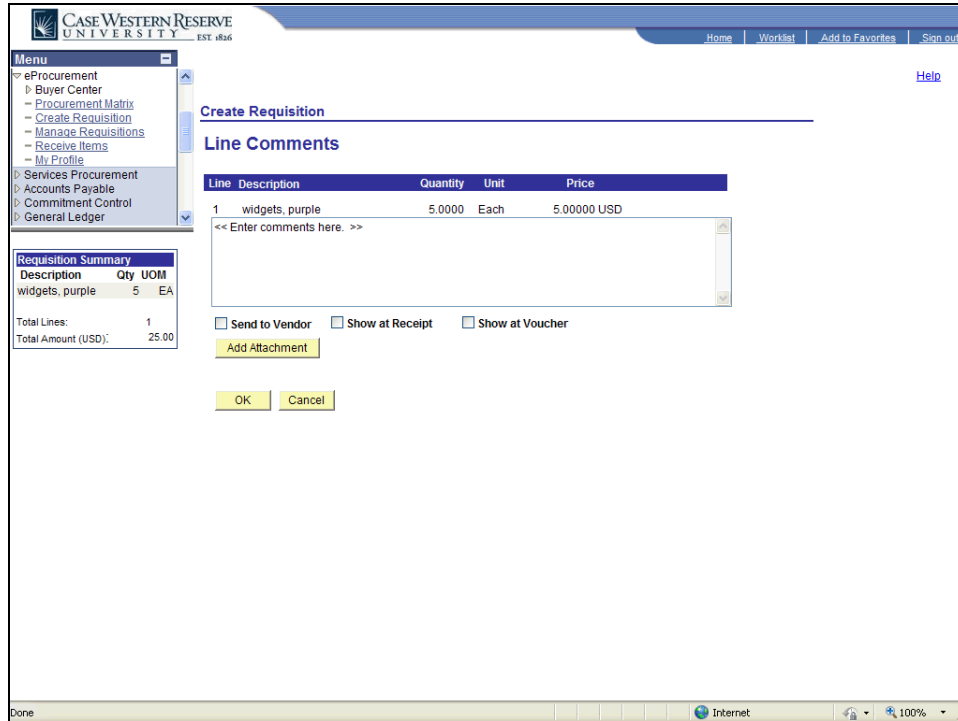
# Creating a Requisition


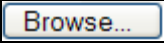


The screenshot displays the 'Create Requisition' interface. Key elements include:

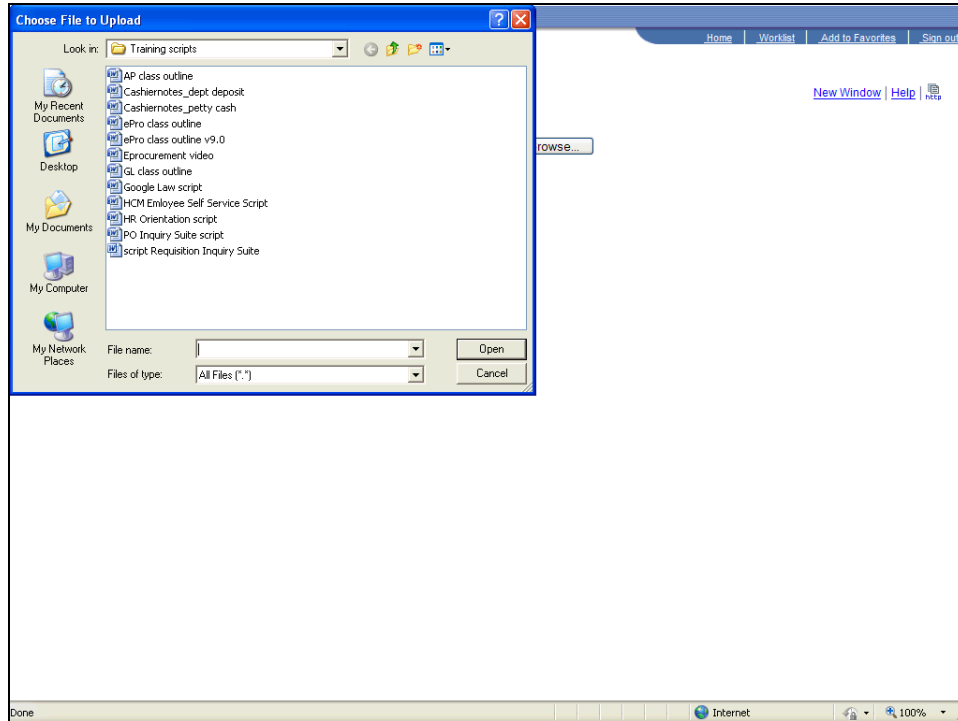
- Business Unit:** CASE1 Case Western Reserve Univ
- Requester:** TRNA001 Nicole N Dyme
- Requisition Name:** Requisition 3
- Priority:** Medium
- Requisition Lines:** A table with columns: Line, Description, Vendor Name, Quantity, UOM, Price, Total. Line 1: widgets, purple, Labchem Inc, 5.0000, Each, 5.00000, 25.00.
- Shipping Line:** 1, Due Date: 02/26/2010, Quantity: 5.0000, Status: Active, Ship To: CEDARAP.
- Accounting Lines:** A table with columns: Line, Quantity, Percent, Amount, Speed Type, Account, Event, Fund, Dept, Project, Class. Line 1: 5.0000, 100.0000, 25.00, OPR261, 531200, 97600, 261221, 10.
- Justification/Comments:** A text area for entering notes.
- Buttons:** Check Budget, Save & submit, Save & preview approvals, Cancel requisition, Find more items.

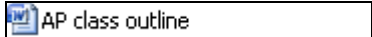
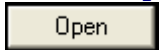
Step	Action
48.	Enter any comments about your purchase into the <b>Justification/Comments</b> field. Your approver and the buyer will see this information.
49.	To add attachments, click the <b>Comments</b> icon to the far right of the item. 



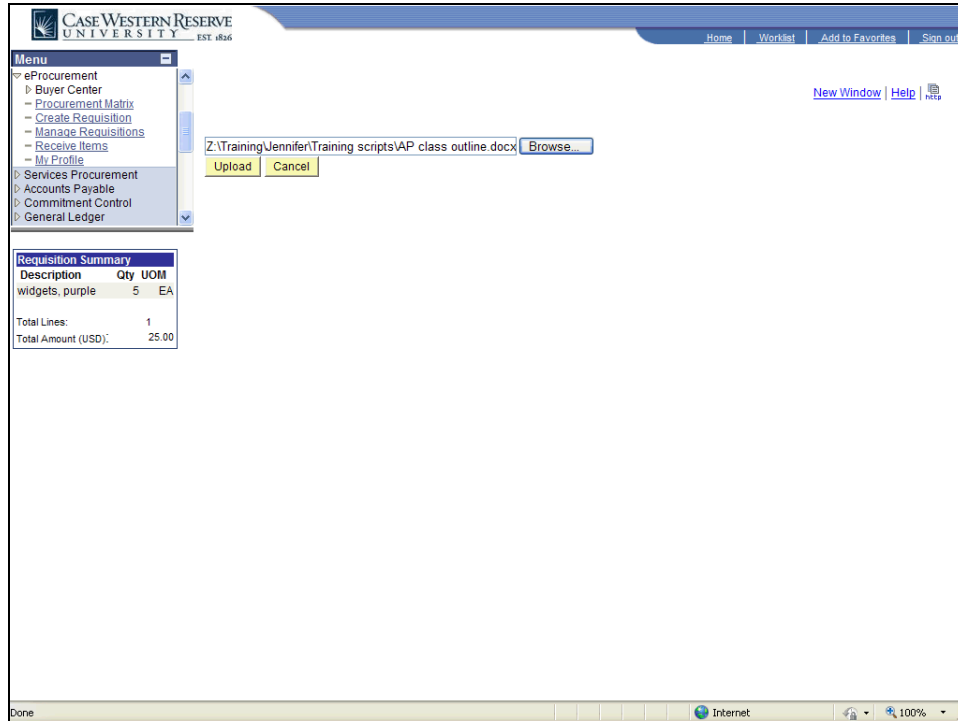
Step	Action
50.	The Line Comments page will appear. To attach a .pdf file, click the <b>Add Attachment</b> button. 
51.	Click the <b>Browse...</b> button. 

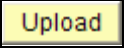
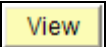
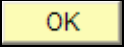
# Creating a Requisition



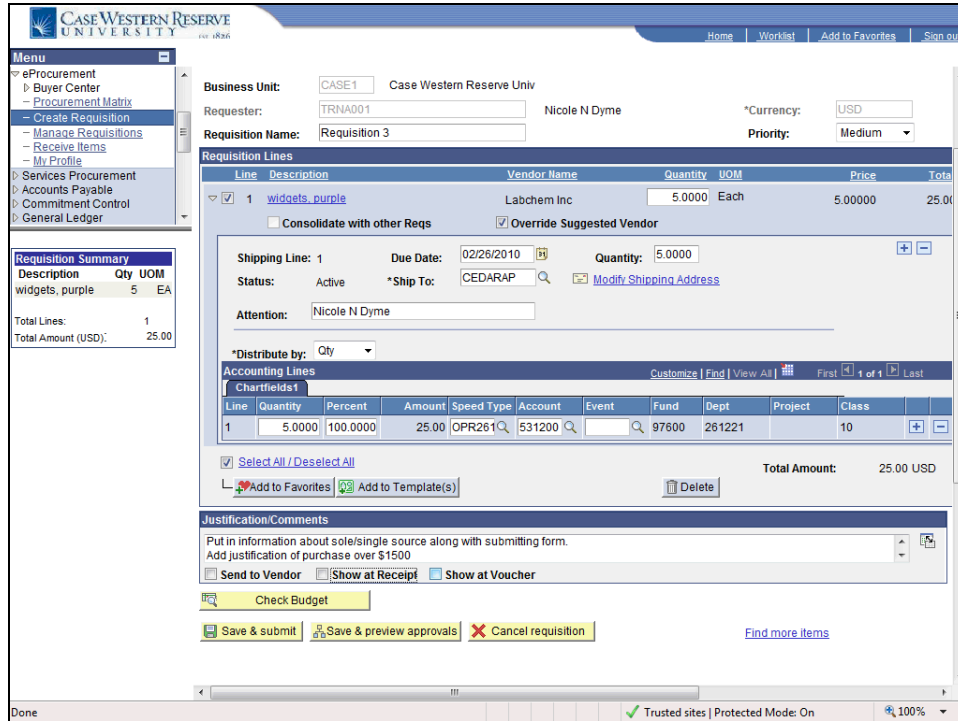
Step	Action
52.	The file to upload screen will open. Click the file name to attach from the list. 
53.	Click the <b>Open</b> button. 


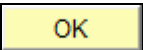
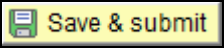
## Creating a Requisition

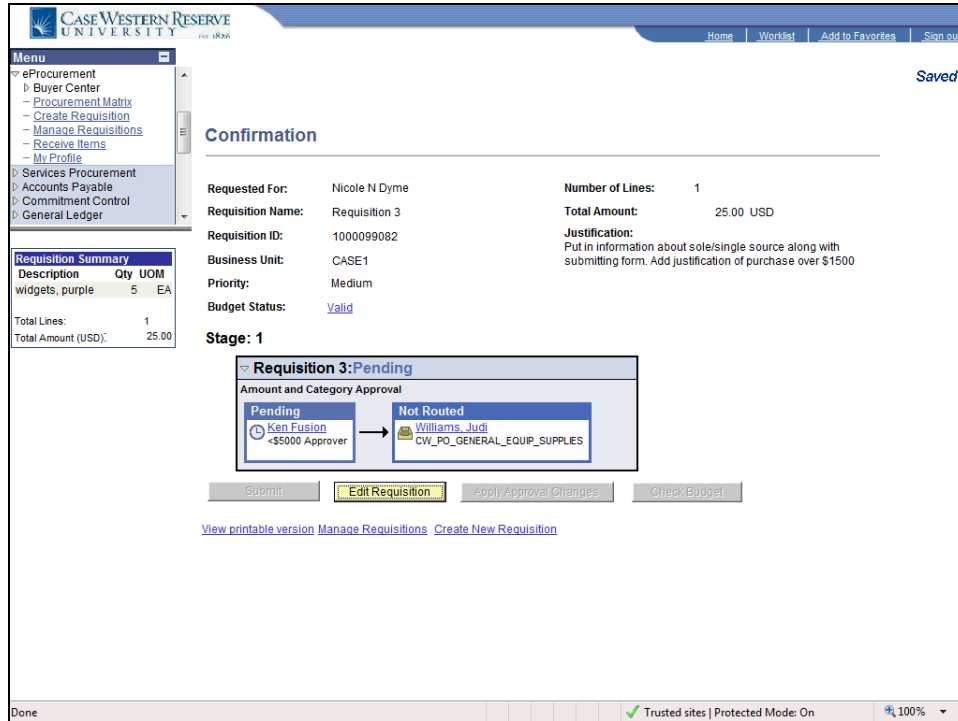


Step	Action
54.	Your file path will populate in the field. Click the <b>Upload</b> button to attach the file. 
55.	The file is attached. Click the <b>View</b> button to view the file attached. 
56.	Click the <b>OK</b> button. 

# Creating a Requisition



Step	Action
57.	The system will automatically budget check. Click the <b>Check Budget</b> button if you want to check sooner. 
58.	Read the information, it will save your Requisition for you in Open status, you will still need to submit. Click the <b>OK</b> button. 
59.	Once Budget Checking has been completed the Edit Requisition page will appear. Budget Checking Status: will appear with the status. If there is a problem, click the <b>Budget Checking Status</b> link to see more.
60.	To save the Requisition and preview your approvals before submitting, click the <b>Save &amp; preview approvals</b> button.
61.	When ready to submit the completed requisition, click the <b>Save &amp; submit</b> button. 



Step	Action
62.	<p>A Confirmation page appears. Editing the Requisition is still possible, make sure to Save and Submit again. Approvals are now pending as indicated in the Stage 1 boxes.</p> <p>A printable page is available for your records. Click the <b>View printable version</b> link.</p>
63.	The Manage Requisitions link will navigate to the search and information about the requisitions you have created.
64.	Start a new requisition from here by clicking the <b>Create New Requisition</b> link.
65.	<p>You have created a requisition. To find out more about your requisition. Review the Manage Requisitions document.</p> <p><b>End of Procedure.</b></p>