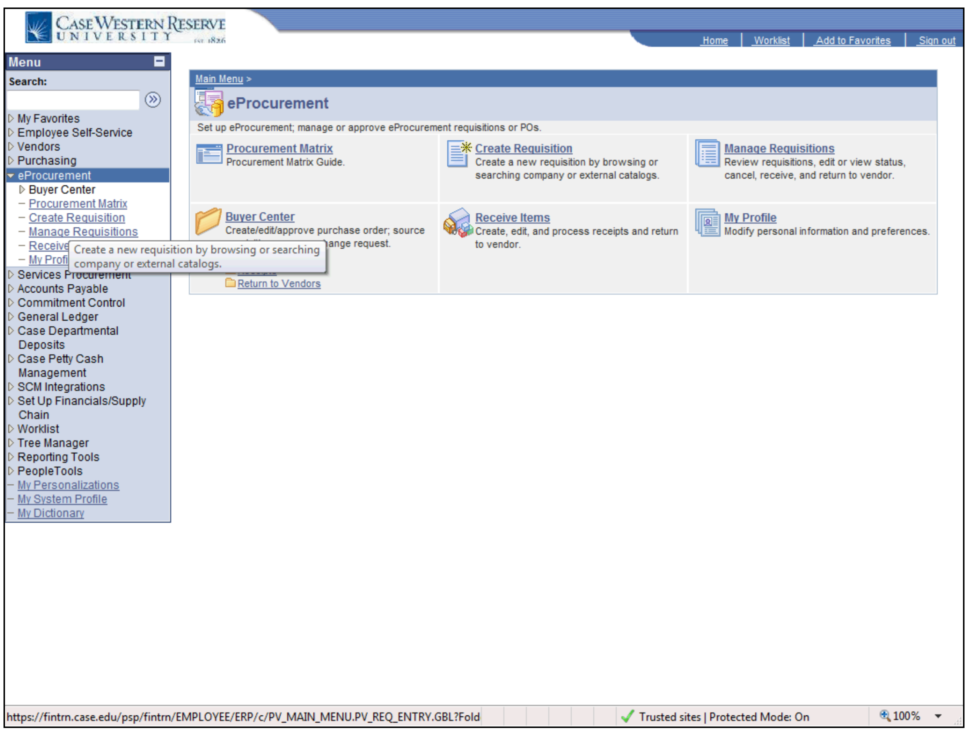
Creating a Requisition

Concept

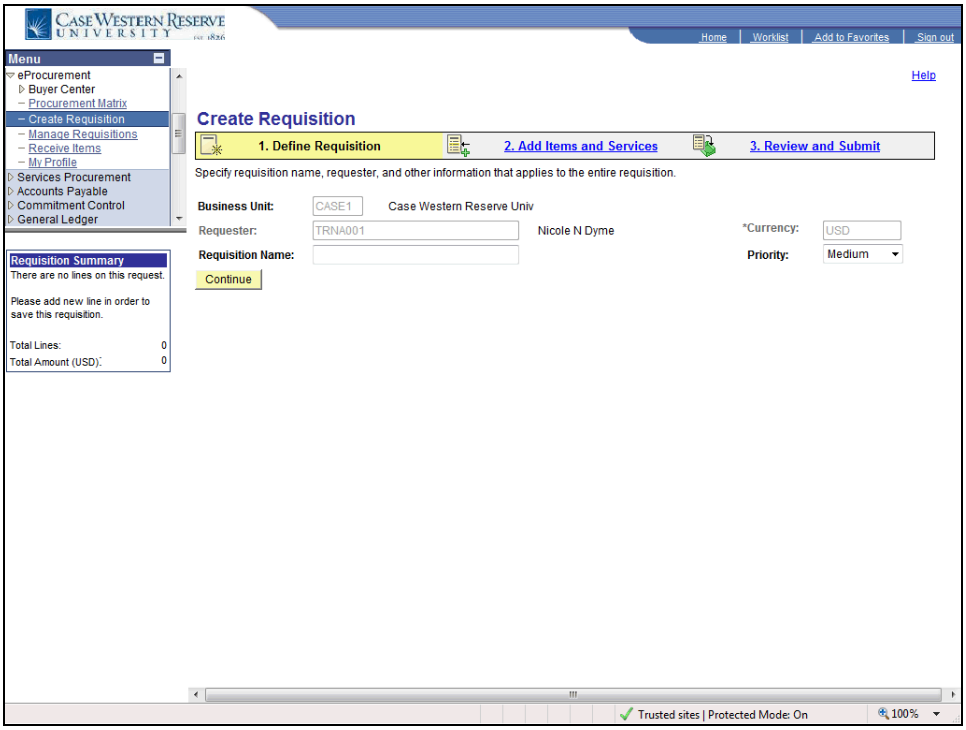
This guide will demonstrate how to enter a Purchase Requisition. It will also demonstrate how to view the status and approvals of your requisition.

Procedure

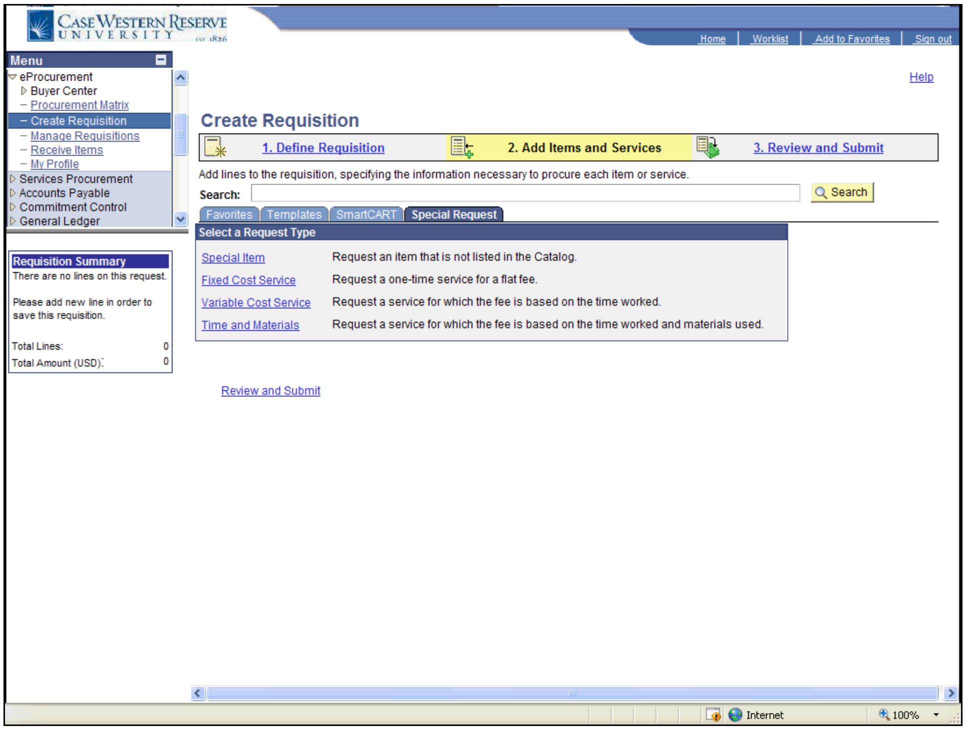
Log into the Financials database using your Case ID and password.



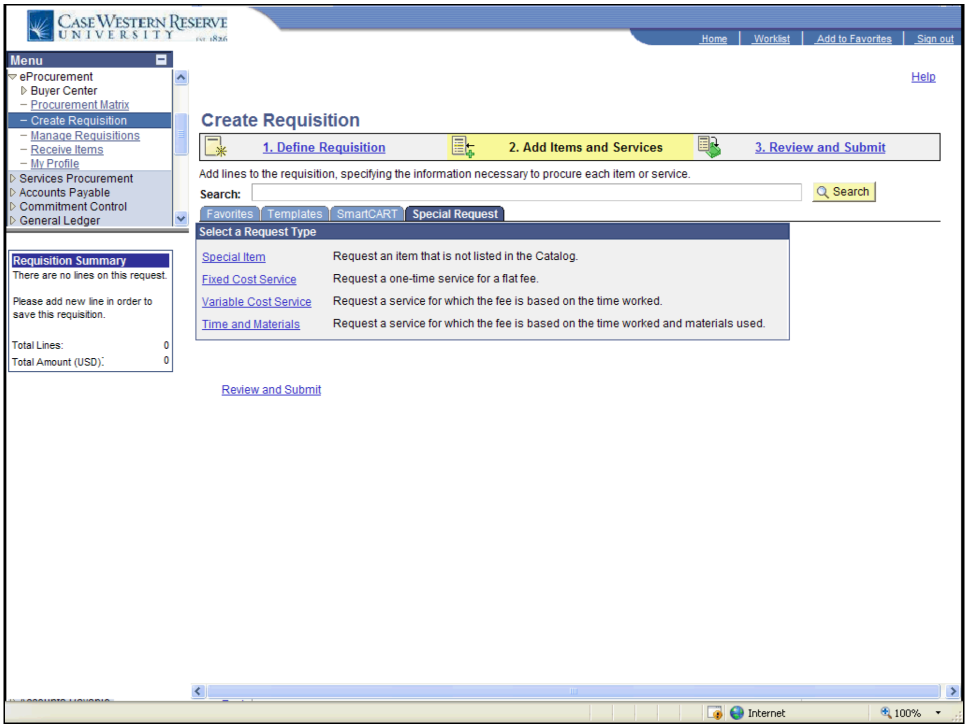
Step	Action
1.	From the left-hand Menu, Click the **eProcurement** link, then **Create Requisition**, or click the **Create Requisition** link in the center Menu.

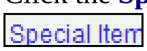


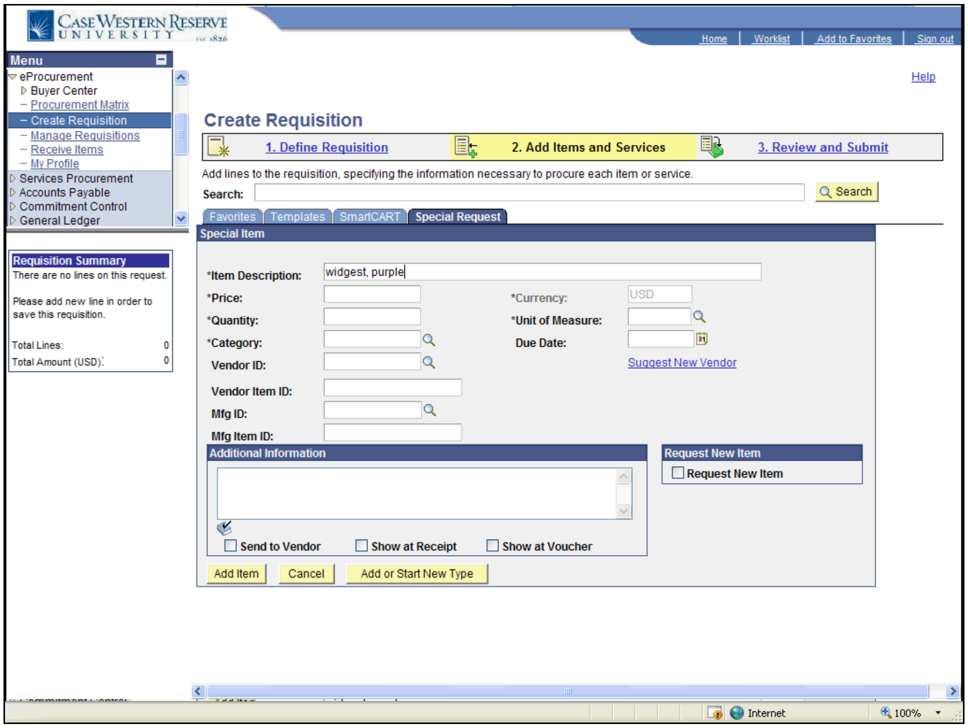
Step	Action
2.	The **Create Requisition** screen appears.
3.	The **Requisition Summary** box appears on the left-hand side under the Menu. This is where you will see the line items, Total Lines, and Total Amount of your Requisition as you create your Requisition.
4.	Note the 3 steps to complete and submit a requisition are identified at the top of the screen. **1. Define Requisition** **2. Add Items and Services** **3. Review and Submit**
5.	The **Business Unit** defaults to CASE1. The **Requestor** field defaults to your Case Network ID. Your name will show next to this field.
6.	Enter a name for your requisition in the **Requisition Name** field. For example, enter "**Requisition 3**". The **Requisition Name** 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 **Continue** button. Continue

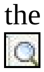


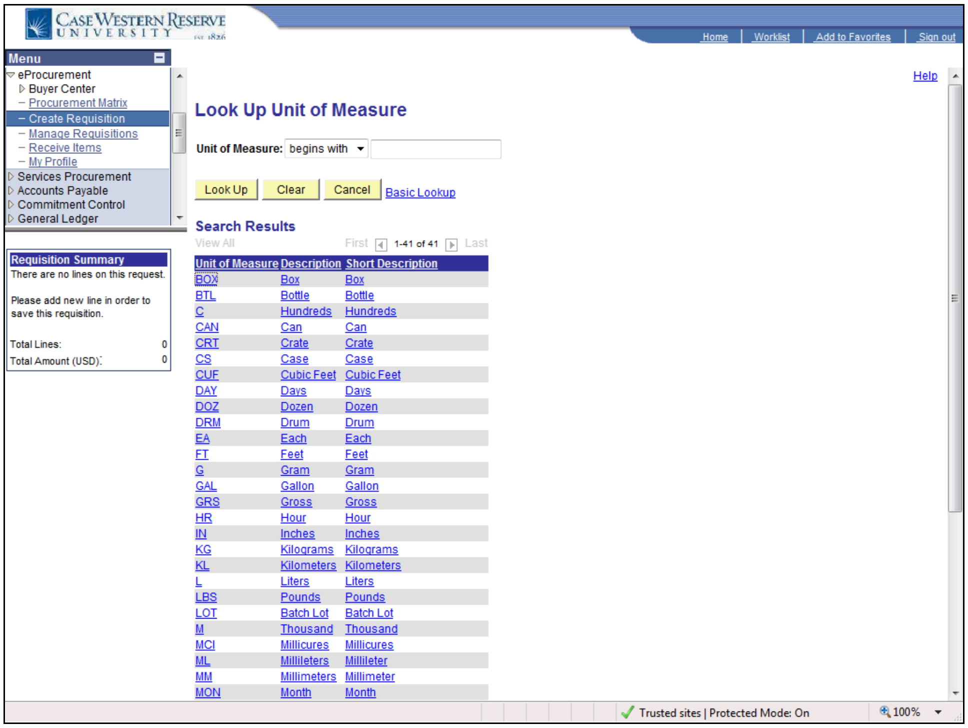
Step	Action
8.	The **Add Items and Services** screen will appear. Note the tabs on the page. Click the **Special Request** tab. **Templates** allows you to retrieve any templates you have saved. **SmartCart** will allow you to access the catalogs available (coming May 10). **Special Request** is where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



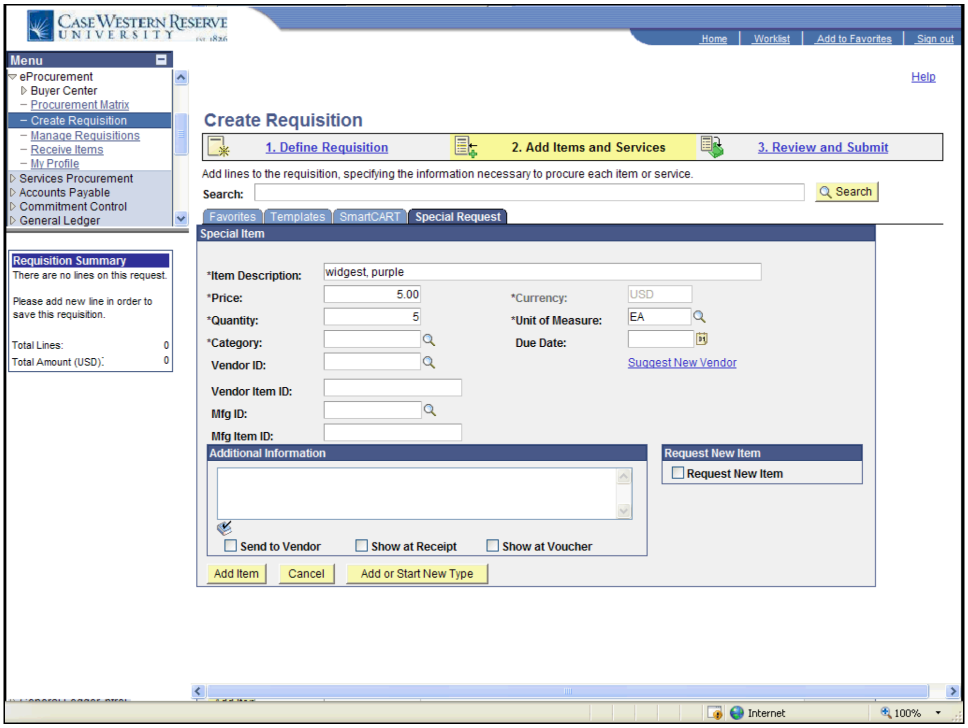
Step	Action
9.	The Select a Request Type screen appears. Click the **Special Item** link. 



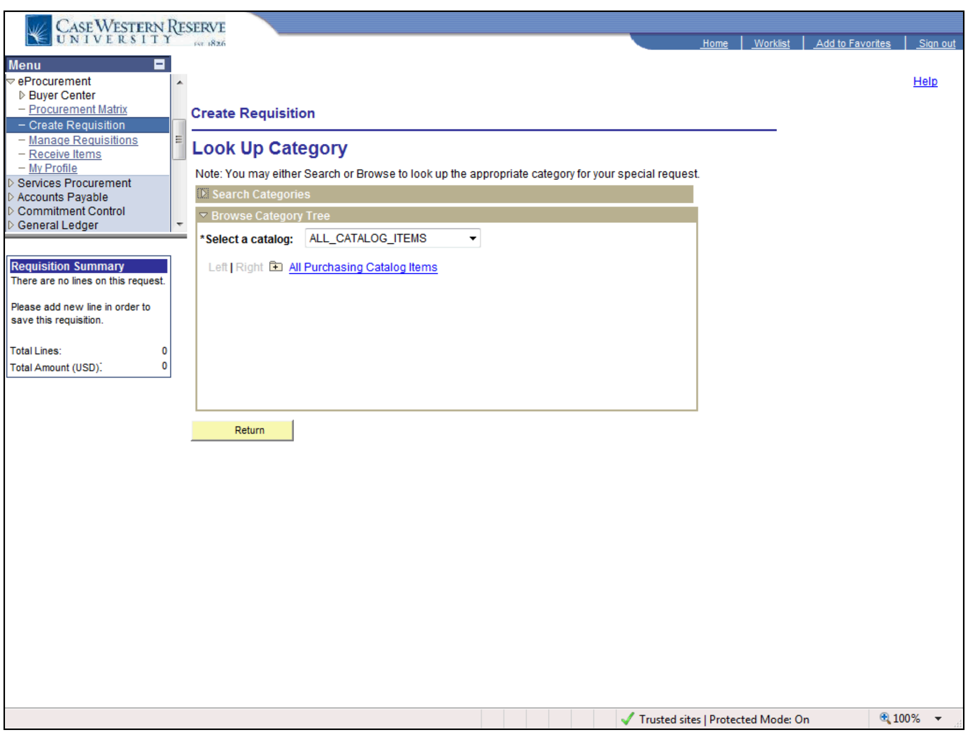
Step	Action
10.	The Special Item screen appears where you will enter details about the item you wish to purchase. Enter what you are purchasing in the **Item Description** field. For example "**widgets, purple**". The description must include the catalog number, description, size and color (if applicable).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



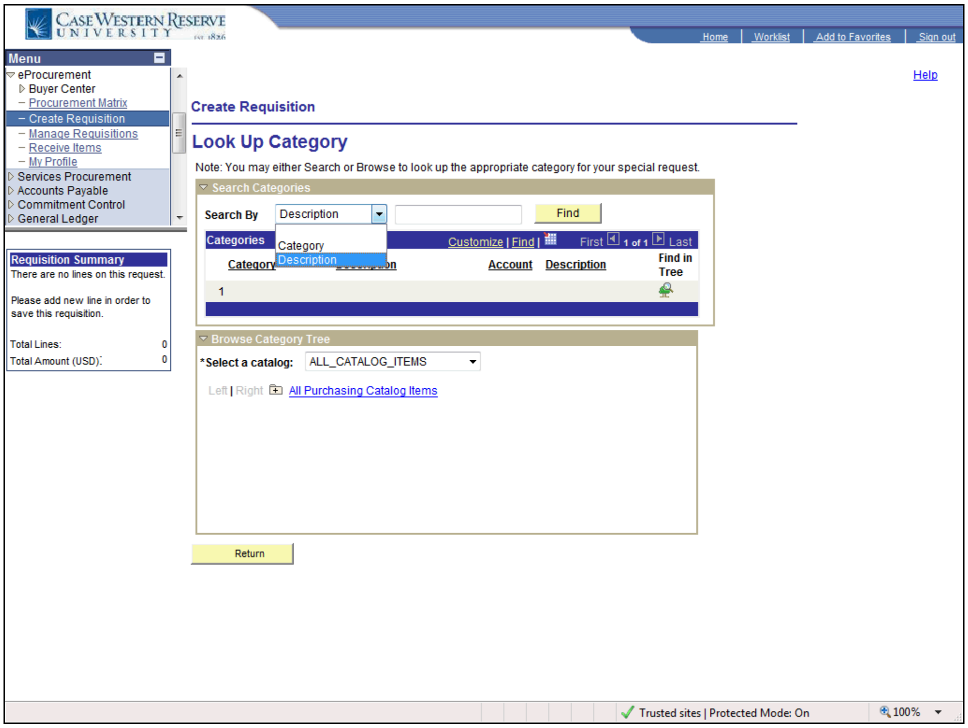
Step	Action
14.	The Look Up Unit of Measure page appears. Note the **LOT** Unit of Measure, this will be used to for blanket requisitions or to upfund a purchase order.
15.	Most of the time items will use the **Each** Unit of Measure Click the **EA** link. 



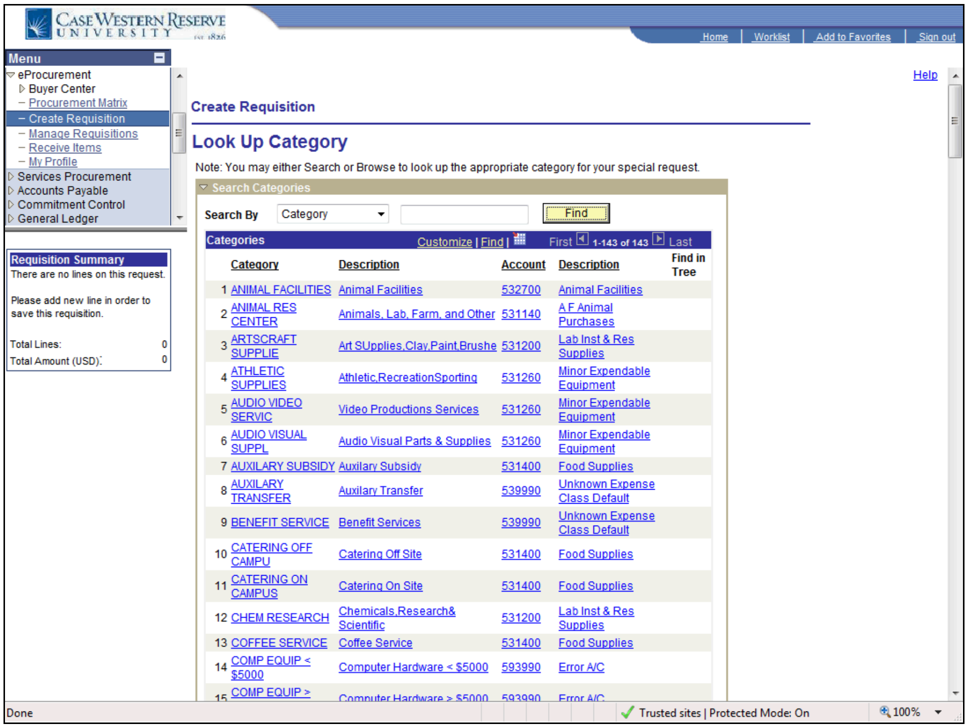
Step	Action
16.	Click the **Category Lookup** icon to choose the correct category for your purchase.



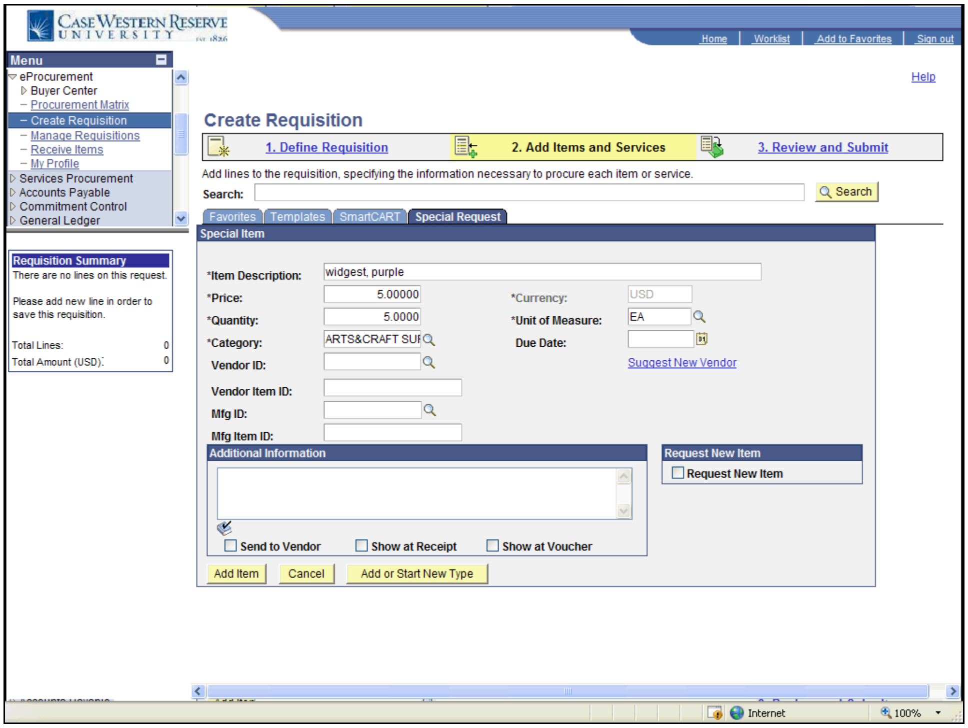
Step	Action
17.	The Look Up Category page appears. Click the **Expand section** button next to the name **Search Categories.**



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



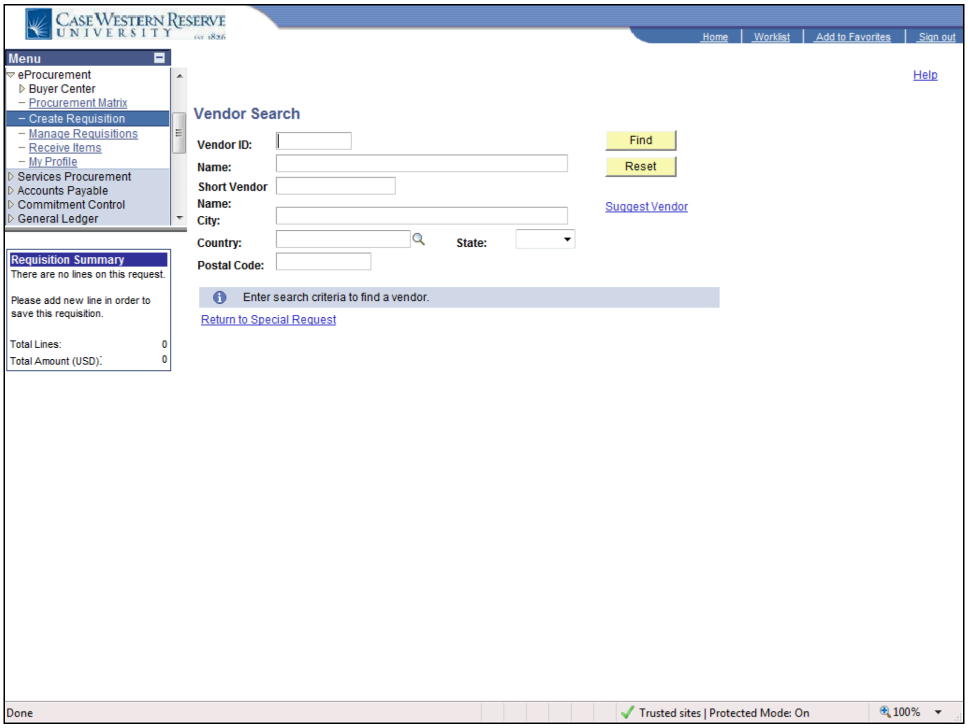
Step	Action
20.	A list of all the University categories appears. Notice the Account number is now associated with the category. Click the name of the **Category** link. For example, click **ARTSCRAFTSUPPLIE** 3 ARTSCRAFT SUPPLIE

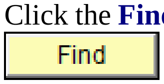


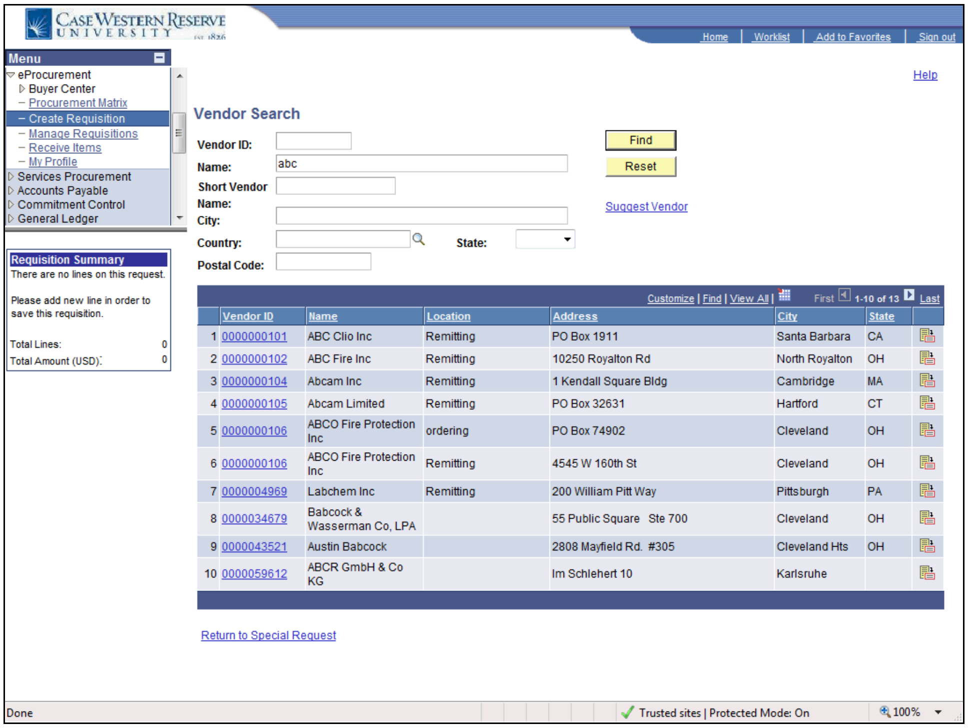
Step	Action
21.	The Special Item page returns. Enter the date you need the item in the **Due Date** field or use the calendar icon to choose the date. To select a due date using the calendar icon, click the **Calendar** button. A calendar will pop open, choose a date from the Calendar popup by clicking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

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.

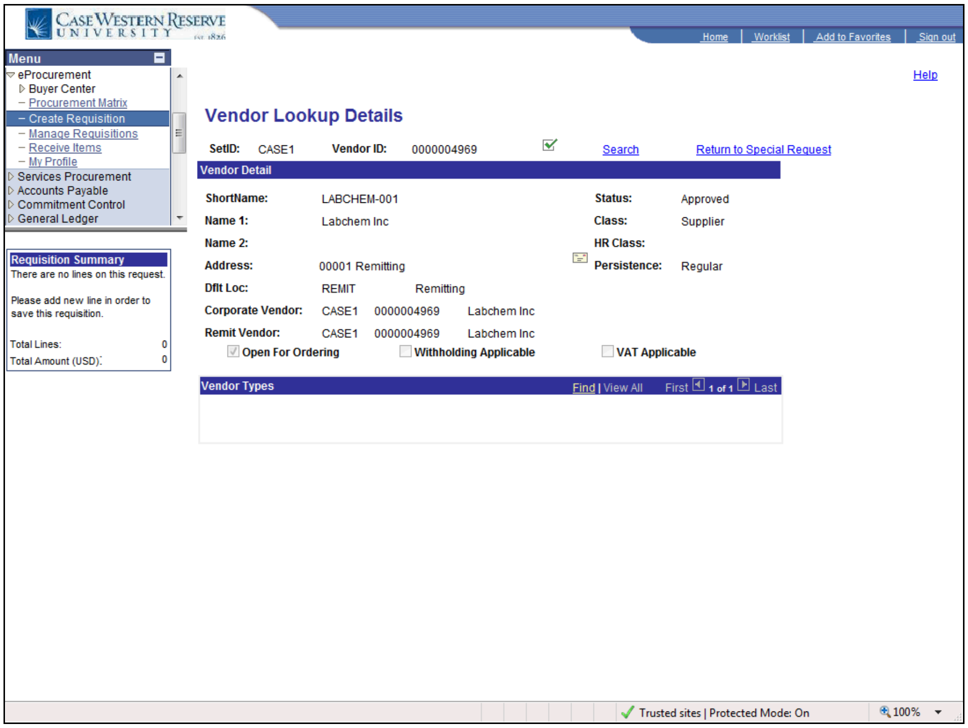
Step	Action
22.	To search for a vendor, next to the Vendor ID: field is the **Vendor Lookup** icon. Click the **Vendor Lookup** icon. 



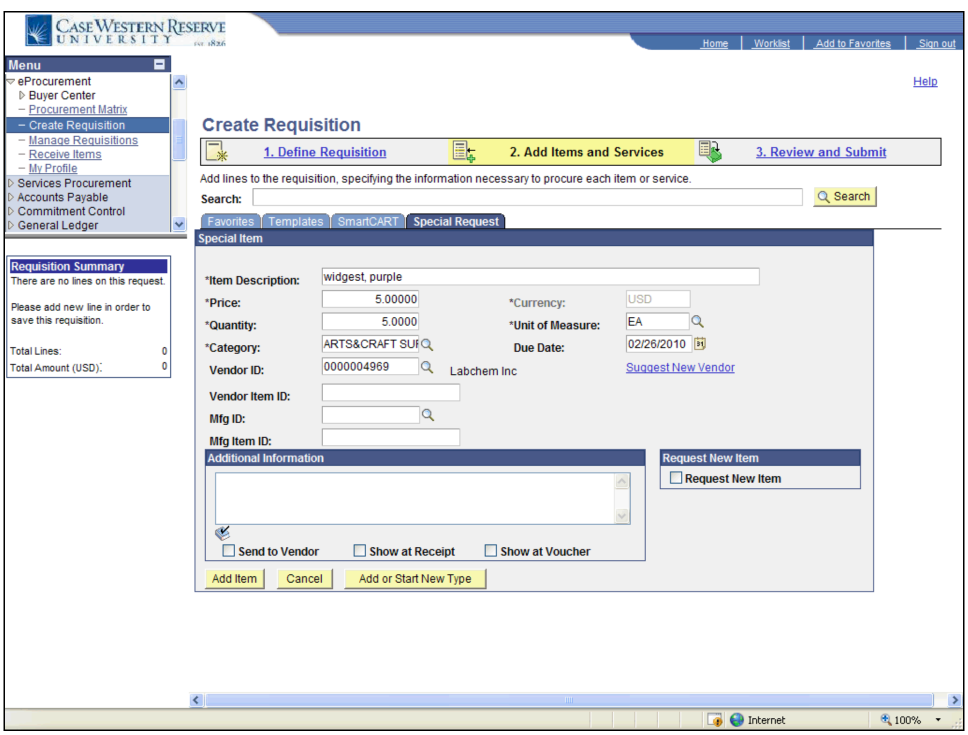
Step	Action
23.	The Vendor Search page appears. Enter a partial search in the **Name** field. The less you enter the better your search results. For example, enter "**abc**".
24.	Click the **Find** button. 



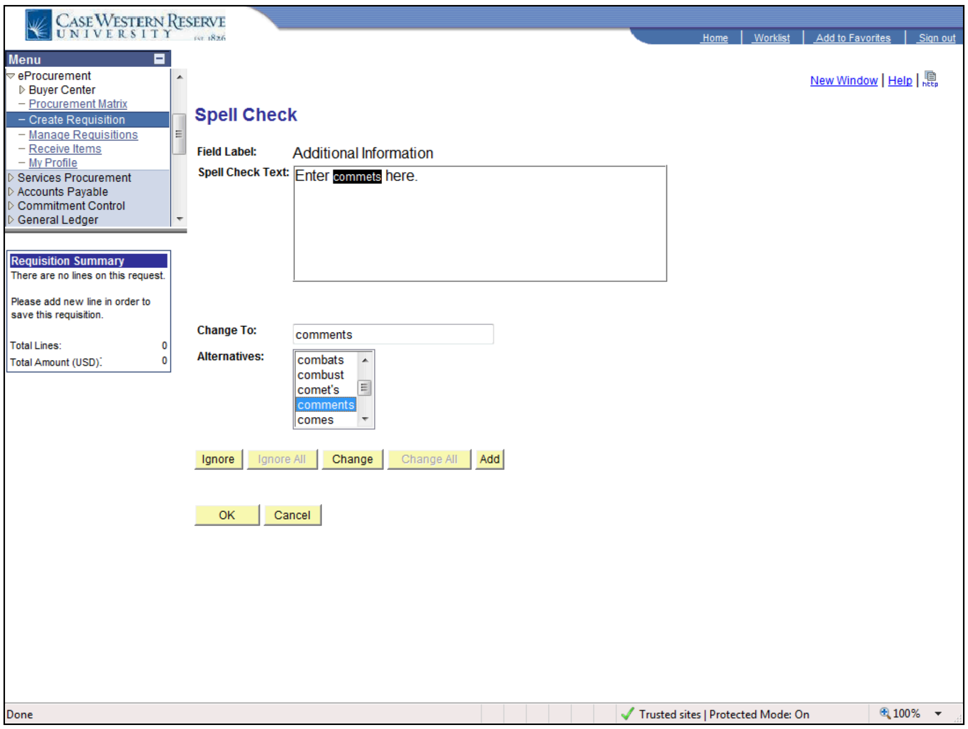
Step	Action
25.	A list of Vendors appears containing your search criteria. To select a vendor, click the **Vendor ID** number link for that vendor.
26.	To see information about a vendor, click the **Vendor Detail** button. 



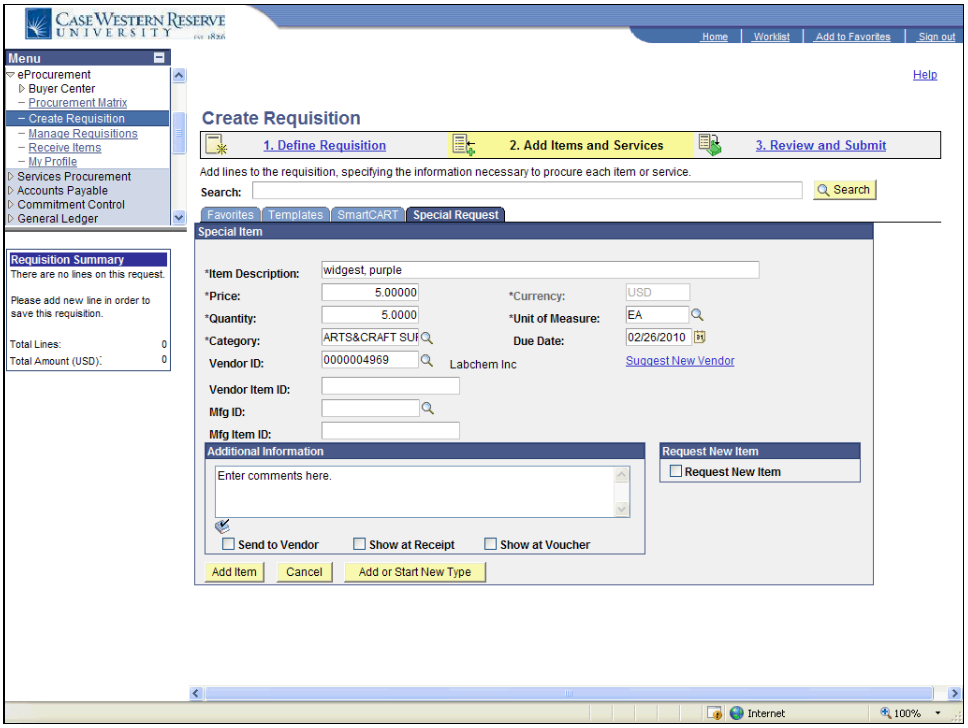
Step	Action
27.	The **Vendor Lookup Details** page appears. Vendor Lookup Details



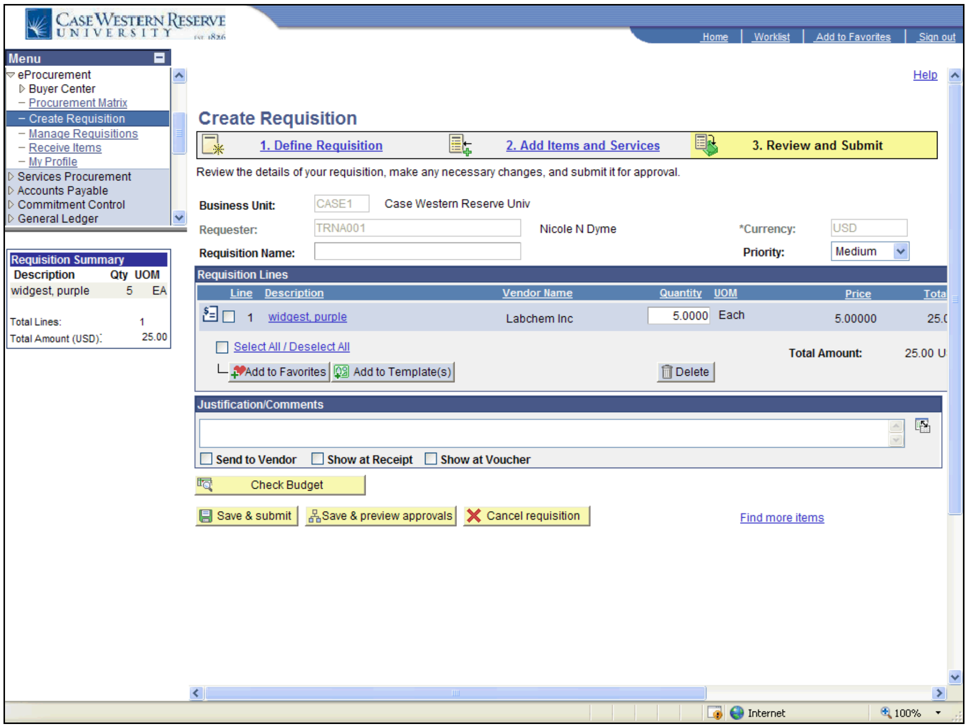
Step	Action
28.	To add comments about your entire requisition, enter them into the **Additional Information** box. To enter important comments for the buyer or approver, we will do that later on the payment and shipping area.
29.	To spell check your entry, click the **Spell Check icon** if desired.



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

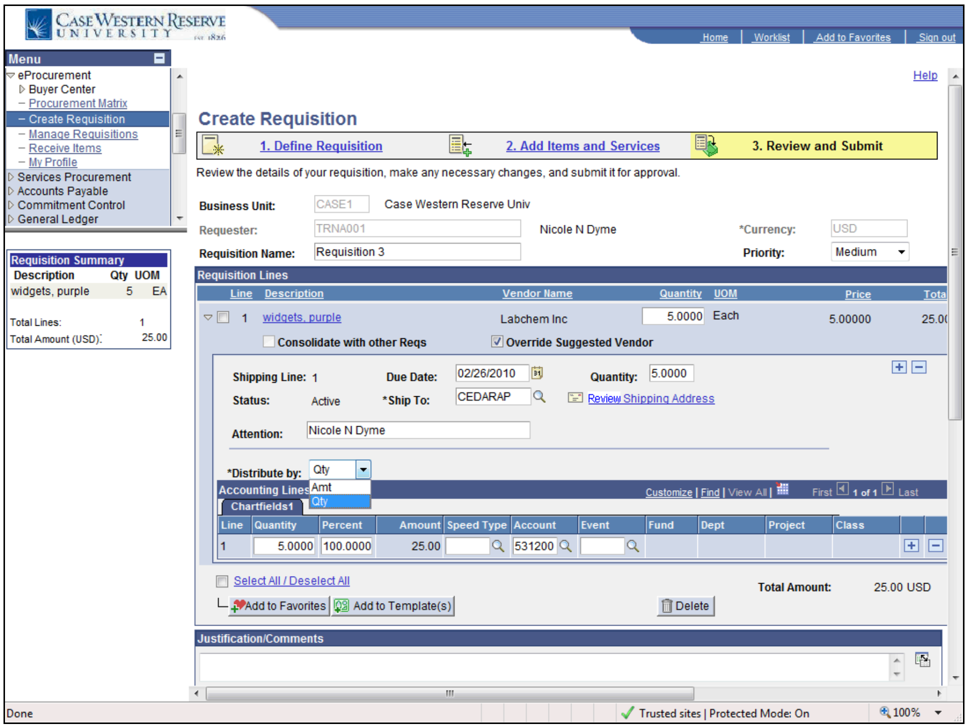


Step	Action
33.	You are returned to the Special Item screen. To add the item to your Requisition, click the **Add Item** button. Add Item
34.	To finish your requisition, click the **3. Review and Submit** link. 3. Review and Submit

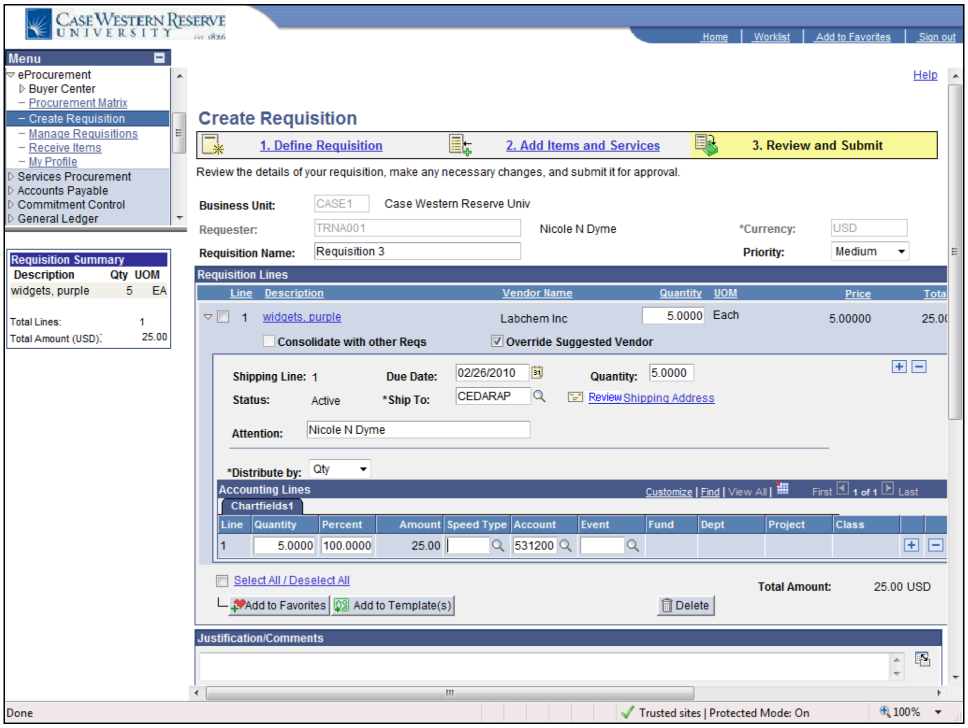


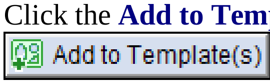
Step	Action
35.	The requisition Lines page appears. A list of all the items you have purchased will appear here. In addition, the Requisition Summary box to the left will be populated with your items. To attach information to your Requisition, scroll to the right and click on the comment bubble. The Add Attachment screen will open as in the previous version.
36.	To enter shipping and payment information Click the **Expand Section** button to the left of each item. 
37.	The **Ship To** field will populate with your ID and will be associated with the location on your security form. 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. **NOTE:** To change your location, submit a security form with the new location. Ship To: CEDARAP
38.	Click the **Review Shipping Address** 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. Review Shipping Address

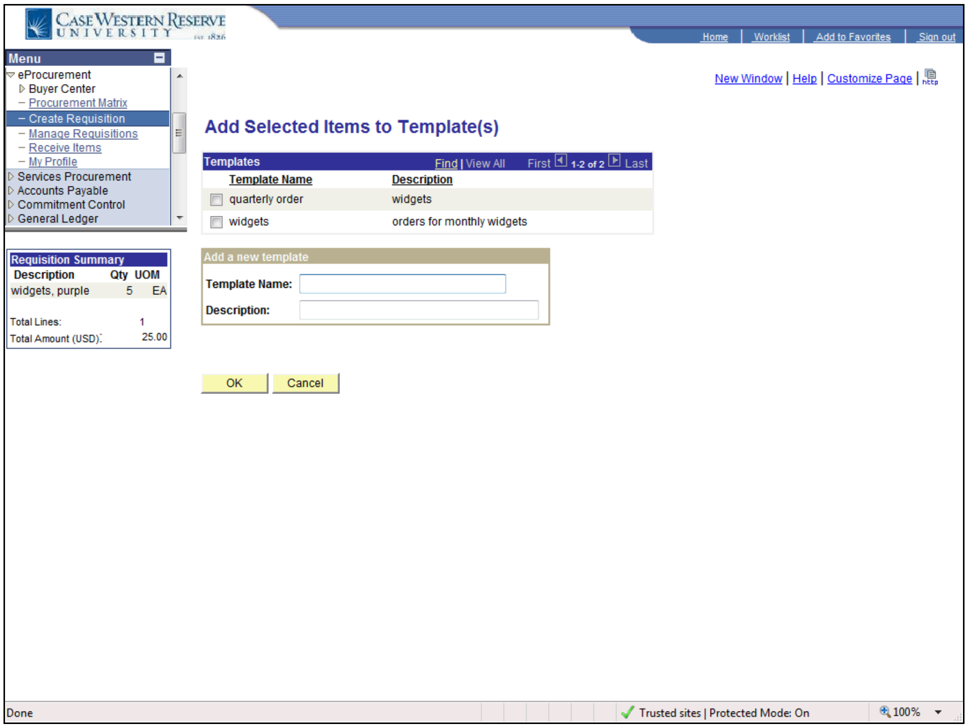
Step	Action
39.	Enter Payment information in the same area as shipping. To change the Accounting Distribution, click the **Distribute by** dropdown and choose Qty or Amt. Qty



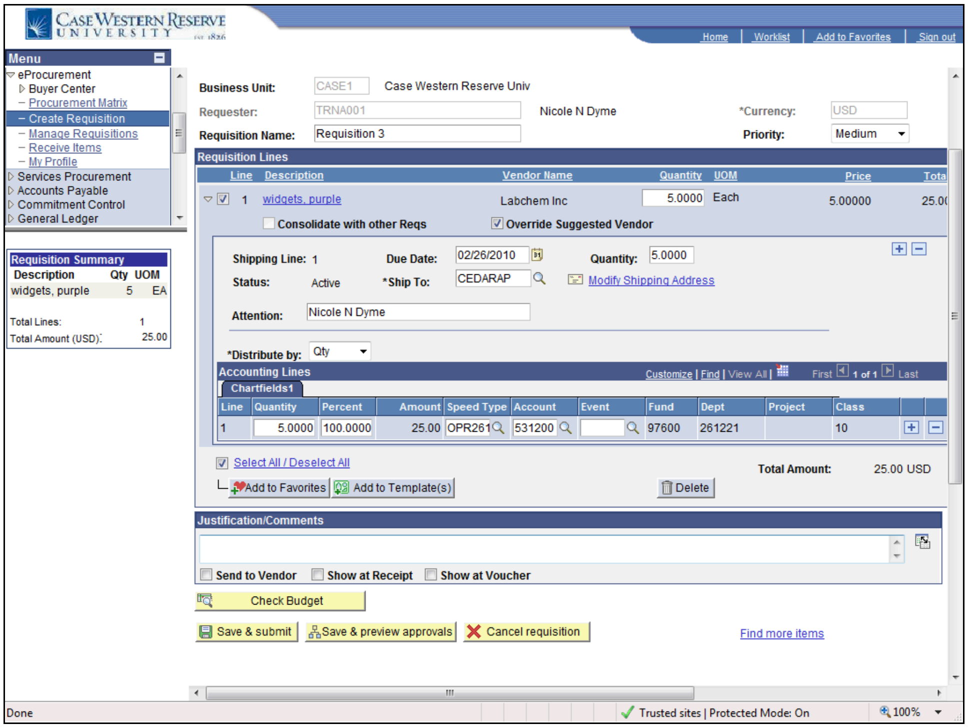
Step	Action
40.	Click the **Amt** list item. Amt



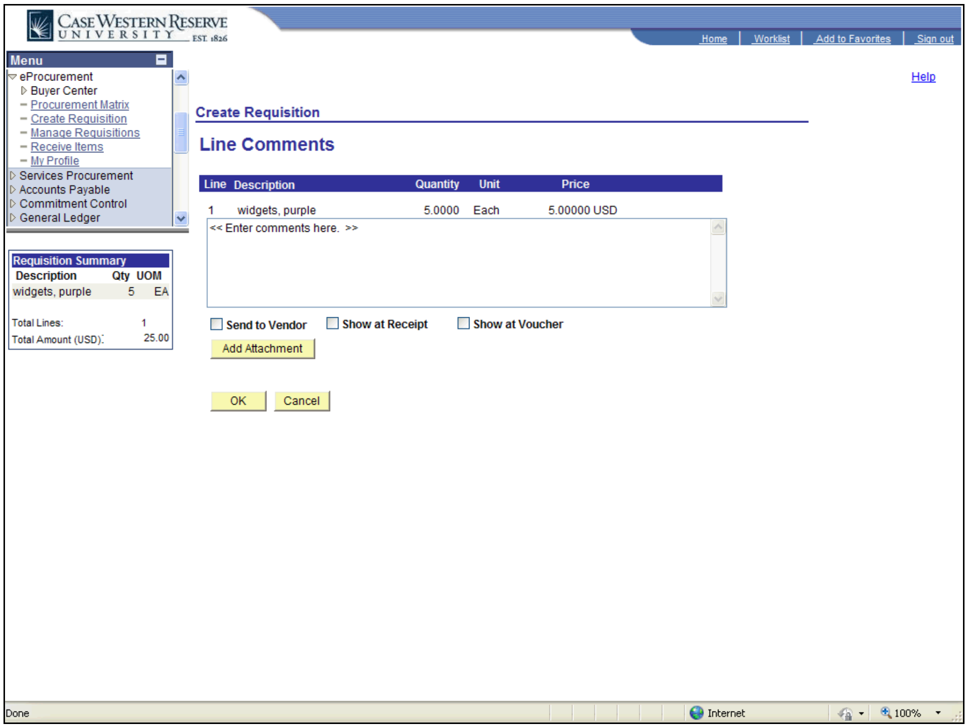
Step	Action
41.	Enter the Speed Type into the **Speed Type** field. For example, enter "**OPR261221**".
42.	The Account field will default to the account associated with the Category you chose when creating your Requisition.
43.	To add this to your Templates list, click the checkbox next to the item.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



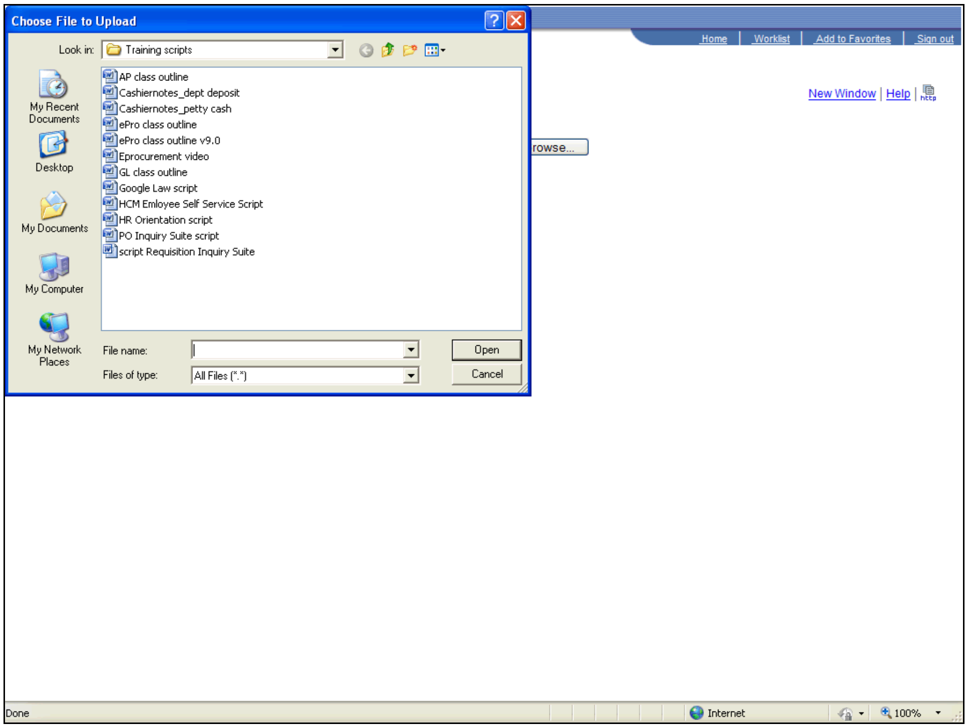
Step	Action
45.	The **Add Selected Items to Template(s)** page appears. Enter the desired information into the **Template Name** field. For example, enter "**my order**".
46.	Enter a description of your template in the **Description** field. For example, enter "**training dept**".
47.	After you have 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 **OK** button. OK

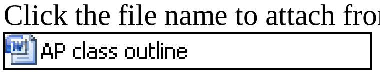
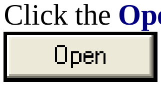


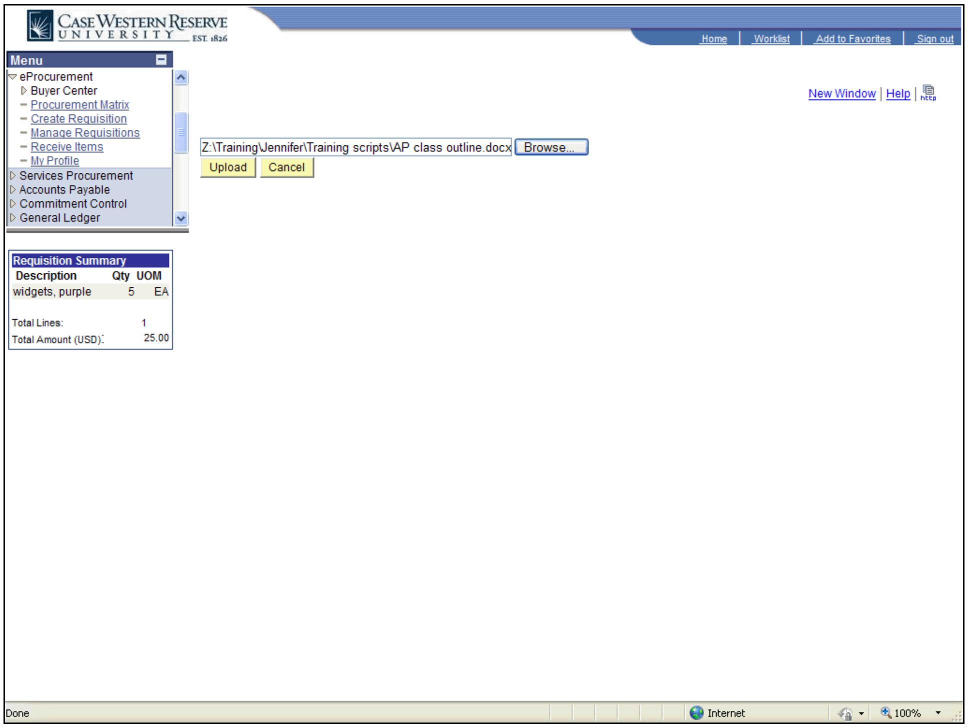
Step	Action
48.	Enter any comments about your purchase into the **Justification/Comments** field. Your approver and the buyer will see this information.
49.	To add attachments, click the **Comments** icon to the far right of the item. 



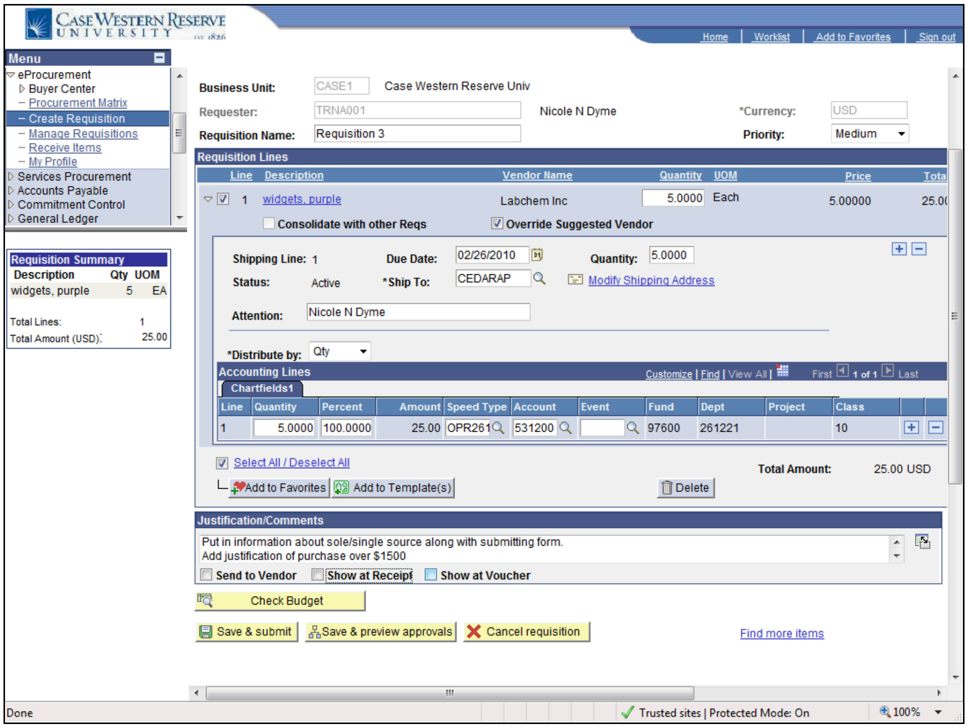
Step	Action
50.	The Line Comments page will appear. To attach a .pdf file, click the **Add Attachment** button. Add Attachment
51.	Click the **Browse...** button. Browse...



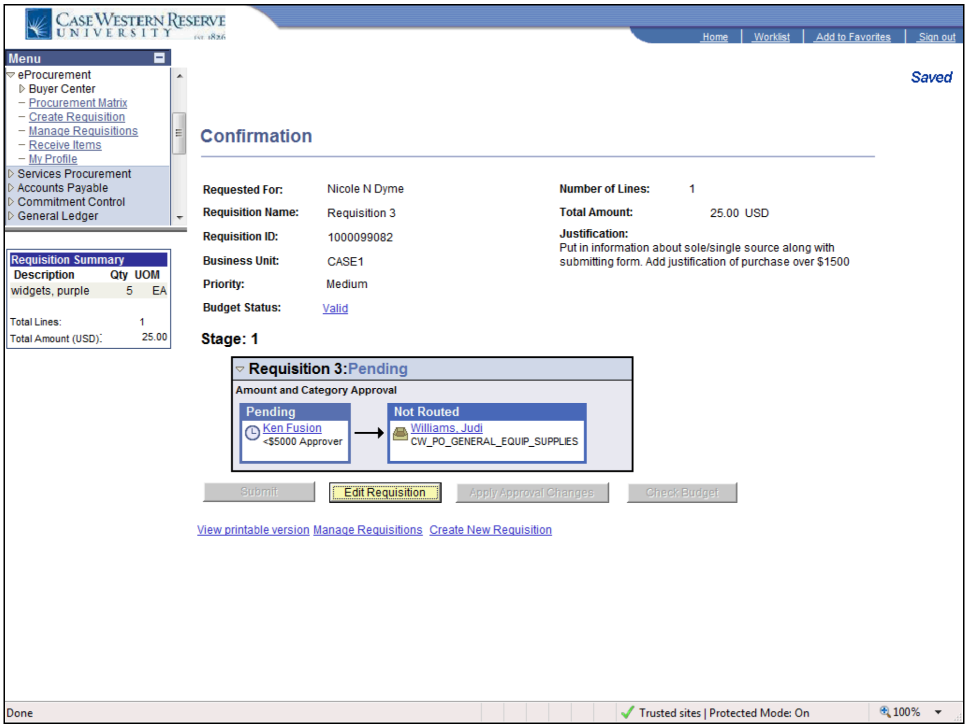
Step	Action
52.	The file to upload screen will open. Click the file name to attach from the list. 
53.	Click the **Open** button. 



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



Step	Action
57.	The system will automatically budget check. Click the **Check Budget** button if you want to check sooner. Check Budget
58.	Read the information, it will save your Requisition for you in Open status, you will still need to submit. Click the **OK** button. OK
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 **Budget Checking Status** link to see more.
60.	To save the Requisition and preview your approvals before submitting, click the **Save & preview approvals** button.
61.	When ready to submit the completed requisition, click the **Save & submit** button. Save & submit



Step	Action
62.	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. A printable page is available for your records. Click the **View printable version** link.
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 **Create New Requisition** link.
65.	You have created a requisition. To find out more about your requisition. Revew the Manage Requisitions document. **End of Procedure.**