Creating a purchase requisition

Contents

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THINGS TO REMEMBER

- The Purchasing Department must create a purchase order ***BEFORE*** you receive services, materials, and/or an invoice from the supplier. Purchases that have been initiated and processed by an end-user without a purchase order are "**UNAPPROVED PURCHASES**." The College cannot be held liable for purchases made without a purchase order. All purchases MUST have an assigned purchase order number issued by the Purchasing and Contract Services Department prior to making a purchase. If a purchase is made without a PO, the payment cannot be made. **Potentially the end user can be held financially responsible for any order placed without a college-authorized purchase order.**
- A requisition that is created after a purchase has been made is called a **Confirmation Requisition**. If approved, a justification form will need to be uploaded as a single attachment to line 1 of the requisition. Identify the requisition as a confirmation by stating "CONFIRMATION" as the first word in the description box on Line 1 of the requisition. An example would be "CONFIRMATION – PAYMENT FOR xxx" and then provide further details in the **Additional Information** field.
- This does not affect P-Card purchases. You do not need a requisition to use your purchasing card.

OVERVIEW OF PROCEDURE

This manual explains how to enter each component of a Requisition, and how they relate to each other. In PeopleSoft, Requisitions consist of four components:

- HEADER – Where general information pertaining to the entire order is stored and displayed. This includes data such as the suggested Supplier, Buyer, Ship-To, and Due Date.
- LINES – Where the description, unit of measure, category and quantity for each item you are ordering.
- SCHEDULE – Where the due date, ship to address and unit price are stored for each item on the order.
- DISTRIBUTION – Where the accounting information (i.e. the general ledger chartfield string) is entered.

Purchase Requisitions (or purchase requests) are the first step in the Procure to Pay process. The general process is outlined below.

- Gather necessary information including quotes or "carts" of goods
- Log into PeopleSoft
- Begin the requisition
- Add budget and shipping information

- Attach cart, quotes and supporting documentation
- Input item information
- Save the requisition
- Complete a budget pre-check
- Submit requisition for approval

PROCEDURE

To create and submit a purchase requisition, the REQUESTER will do the following:

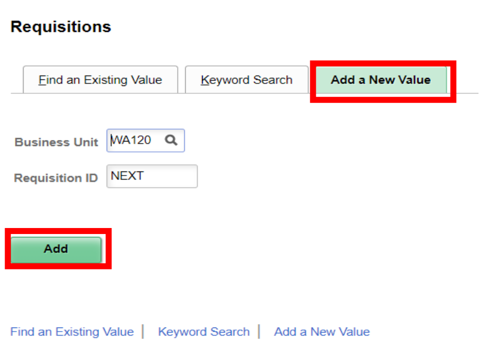
Gather necessary information

1. **SHOP** for goods/services.
2. **GATHER** product/services documentations such as quotes, carts, etc.
3. **SAVE** documentation to be attached in PeopleSoft in one file (combine separate files into one).
4. **OBTAIN** budget chartfields from budget manager.
5. **IDENTIFY** the appropriate category code for the purchase.

Log in and Navigate to Requisitions in PeopleSoft

6. **LOG** into PeopleSoft.
7. **SELECT** FCSM from the top tabs.
8. **SELECT** the NavBar  from the top right-hand corner.
9. **SELECT** the Navigator from the pop-out menu.
10. **SELECT** Requisitions from the Purchasing menu.
11. **SELECT** Add/Update Requisitions from the Requisitions menu.

The Requisitions screen appears

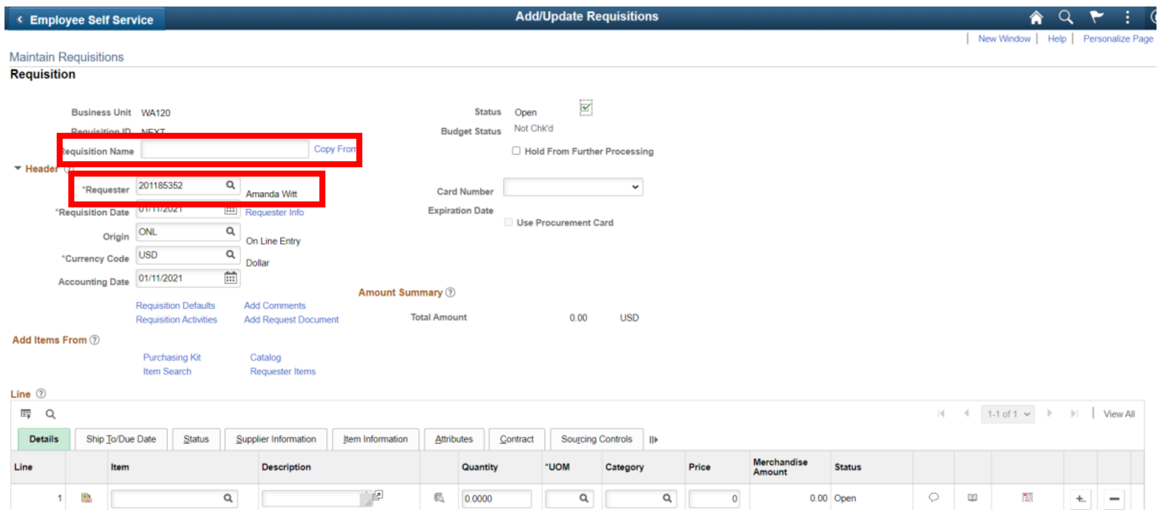


12. **VERIFY** the Add a New Value tab is selected
13. **VERIFY** the Business Unit has defaulted to WA250.
    13a. If the Business Unit has not defaulted to WA250, **TYPE** WA250 in the Business Unit field.
14. **VERIFY** the Requisition ID has defaulted to NEXT

14a. If the Requisition ID has not defaulted to NEXT, **TYPE** NEXT as the Requisition ID.

15. **CLICK** the ADD button.

The **Maintain Requisitions** page displays



16. **TYPE** the name of the Preferred Vendor and, if possible, the requester's first and last name in the Requisition Name field. *Note: There is a character limit on this field, the priority is the vendor name.*

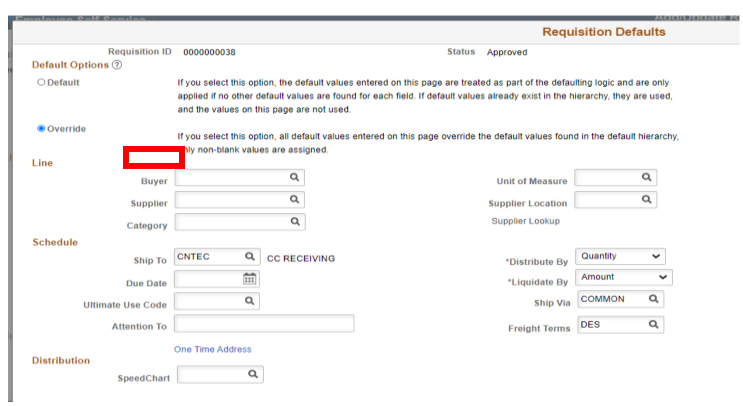
17. If the Requester is creating the requisition on behalf of someone else, **TYPE** the EMPLID or **USE** the look up tool to find the EMPLID in the Requester field.

18. **SKIP** the Requisition Date, Origin, Currency Code and Accounting Date fields.

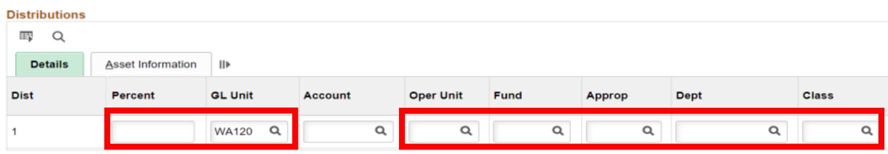
Add budget information

19. **SELECT** the Requisition Defaults hyperlink directly below the Accounting Date field.

20. **SELECT** the Override radio button under Default Options near the top left-hand side of the page.



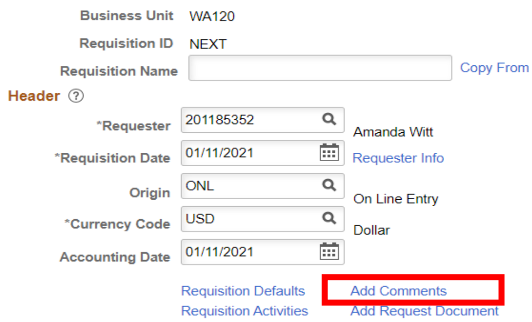
21. **SKIP** the Line and Schedule sections. ***DO NOT ENTER A SUPPLIER on the requisition.***
22. **BEGIN** entering budget chartstring information in the Distributions area near the bottom of the page.



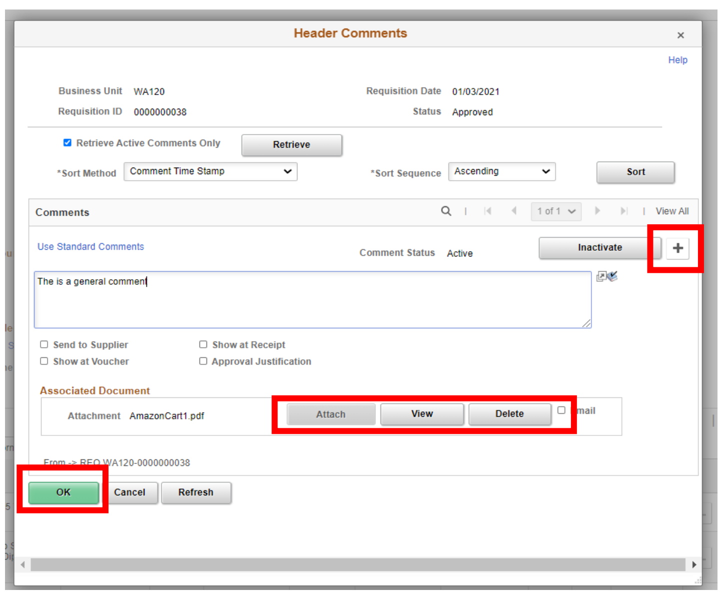
If the cost of the requisition is being charged to *only one budget*, **SKIP** to step 25. If the cost of the requisition is being *split across multiple budgets*, **PROCEED** to step 23.

23. **SCROLL** to the right of the window.
24. **CLICK** the plus sign at the end of the Distribution line.
25. **TYPE** the number of additional budgets that will need to be added to the requisition in the pop-up window. Remember there is already one line available.
26. **TYPE** the percentage as a number (do not include the % symbol) that should be charged to each budget in the Percentage field.
27. **TYPE** or **USE** the lookup tool to enter the following budget chartfield information using the information that was provided by budget manager. ***Do not enter Account here.***
    1. GL Unit - PeopleSoft should default this to WA250
    2. Fund
    3. Oper Unit - 7250
    4. Approp – only if you were provided this information by the budget manager
    5. Dept
    6. Class
    7. PC Bus Unit – only if you were provided this information by the budget manager
    8. Project - only if you were provided this information by the budget manager
    9. Activity - only if you were provided this information by the budget manager
28. **SELECT** Ok.

Attach cart, quote or supporting documentation



29. **SELECT** Add Comments hyperlink.
30. **TYPE** general comments for the Purchasing Office and/or Vendor in the Comment field if desired.
    30a. This is anything that you would like to communicate to the Purchasing office and/or the vendor. You can copy and paste a website, provide sales person contact information, etc.



31. **CLICK** the Attach button in the Associated Document grouping.
32. **CLICK** Choose File to navigate to saved supporting documentation.
33. **CLICK** Open in file browser window.
34. **CLICK** Upload to attach document.
35. **CLICK** View button to verify document successfully attached.
36. **CLOSE** browser window when done viewing attachment.
37. If more than one document needs to be attached to the requisition, **SELECT** the plus sign near the Inactivate button to add an addition line.
38. **REPEAT** steps 30 through 36 to attach additional documents.

39. **SELECT** Ok when done.

Input line item information

40. **VERIFY** the Details tab is selected in the Line information at the bottom of the page.
41. **SKIP** the Item field. This is not a vendor item number, model number or SKU.
42. **CLICK** the Display Description Module icon next to the Description field.

43. **TYPE** description information in the description window. Include things like item number, model, color, general description. ***DO NOT INCLUDE QUANTITY.***
44. **CLICK** Return when complete to close the window.
45. **TYPE** the desired quantity in the Quantity field.
46. **TYPE** or **USE** the look-up tool to enter the Unit of Measure (UOM). Note: Most frequently used are each (EA), box (BOX) or case (CS).
47. **CLICK** the look-up tool in the category field.
48. **CHANGE** the filter on the description field to "contains."
49. **TYPE** a one- or two-word description of the category of item.
50. **CLICK** Search.
51. **CLICK** either the number of the description to select the category.
52. **ENTER** the unit price in the Price field.
53. **SCROLL** to the right of the page.
54. **CLICK** the Schedule icon. 
55. **CLICK** the Distributions icon. 
56. **TYPE** or **USE** the look-up tool to enter the Account.
57. **SCROLL** to the right the State Purpose field.
58. **USE** the Look-Up tool to open the menu.
59. **CHOOSE** the appropriate response based on the type of the item.
    - 59a. If the item is NOT an IT item, choose N
    - 59b. If the item is IT equipment to replace something we already have, choose Y. For example, we are replacing an existing computer
    - 59c. If the item is IT equipment that is to meet a new need, choose X. For example, we received a grant and are purchasing ten new iPads for staff/clients/faculty that have never had iPads before.
60. **CLICK** OK.
61. **CLICK** Return to Main Page.

If the requisition has *more than one line-item*, **PROCEED** to step 62.
If the requisition has *only one line-item*, **SKIP** to step 65.

62. **USE** the scroll bar to slide the page all the way to the right.
63. **CLICK** the plus sign at the end of the first-row item.
64. **ENTER** the number of additional lines that need to be added to the requisition.
65. **REPEAT** steps 41 through 60 for each additional line as needed.

Save, complete a budget pre-check and submit for approval

66. **CLICK** Save at the bottom of the page.
67. **LOCATE** the Budget Status heading near the top right-hand side of the screen.

68. **CLICK** the Budget Pre-Check icon to pre-check the budget.
69. **OBSERVE** the budget status has changed from *Not Chk'd* to *Prov Val*.
    69a. If a pop-up window appears stating the document has failed the budget test, **CLOSE** the pop-up window.
    69b. **CONTACT** the Purchasing Department.

If the budget status is anything other than Prov Val after the budget pre-check, DO NOT SUBMIT FOR APPROVAL. Just save the requisition.

70. **SELECT** the green check mark next to the Status heading.
71. **OBSERVE** the status changes from Open to Pending.

The requisition has entered the Approval Workflow Engine.

72. To view the approval progress, **CLICK** View Approvals at the bottom of the screen to monitor approval process if desired.

After the approval workflow has been completed, your requisition will be moved into the queue for the Purchasing Department to purchase your goods/services.