PO.020.870 – CREATING A PURCHASING REQUISITION

Purpose	• To create a requisition. • To explain the types of information included on the Requisition pages. • To explain the Requisition process from Requisition to Purchase Order to Dispatch to Vendor.
Description	Requisitions consist of four basic elements: Headers, Lines, Schedules, and Distributions. Headers contain identifying information such as the requestor and requestor date. Lines identify the goods being requested. Schedules define when and where the goods will be delivered, and Distributions contain the accounting information. Each requisition has only one header, although it can have multiple lines, schedules, and distributions. There are five different statuses in the Requisition life cycle – Approved, Canceled, Complete, Open, and Pending Approval. Requestors with approval authority can approve the Requisition after entering the Requisition data. Once the Requisition has been approved, it is eligible for Budget Checking and sourcing into a Purchase Order.
Security Role	**BOR_PO_REQ_MAINT**
Dependencies/ Constraints	None
Additional Information	

Procedure

Below are step by step instructions on how to create a requisition.

Step	Action
1.	Click the **NavBar** icon

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2.	Click the **Menu** icon.
3.	Click the **Purchasing** link.
4.	Click the **Requisitions** link.
5.	Click the **Add/Update Requisitions** link.
6.	Click the **Add** button.
	Users can modify the following fields: **Requisition Name**: the Requisition Name field allows users to enter a description of the request to help users identify the requisition as it flows through the system. If this field is left blank, the system uses the Requisition ID as the name. **Requester**: the Requester field displays the name of the requester for this requisition. To create a requisition on behalf of another requester, users can change this field if they have the appropriate user preference. ***Note**: if users need access to create a requisition on behalf of another requester and do not have access, contact the institution's Security Administrator.*
7.	Enter required information under Line Details into the following fields: • **Description** (Ex: Blue Ink Pen) • **Quantity** • **UOM** • **Category** (NIGP Code) • **Price** ***Note:** Users can also enter information under the Ship To/Due Date, Status, Supplier Information, Item Information, Attributes, Contract, and Sourcing Control tabs if desired.*
8.	Click the **Schedule** icon to review/edit Distribution information.
9.	To view and/or add comments at the requisition header level, click the **Add Comments** link. The Header Comments window appears to add comments or attachments to the requisition header. Users can add comments and/or attachments by following instructions below: • Type comments into the textbox. Select the Send to Supplier, Show at Receipt, Show at Voucher and/or Approval Justification check box, depending on where the comments need to appear.

	To add an attachment(s), click the **Attach** button. Browse to locate the file to upload. Once located, click on Upload. Click the OK button.
10.	To view and/or add line comments, select the Line Comments icon for the requisition line. The Line Comments window appears to add comments or attachments to a requisition line. Users can add comments and/or attachments by following instructions below: • To add line comments, type comments into the textbox. Click the OK button. Select the Send to Supplier, Show at Receipt and/or Show at Voucher check box, depending on where the comments need to appear. To add an attachment(s), click the **Attach** button. Browse to locate the file to upload. Once located, click on Upload. Click the OK button.
11.	Once all the requisition information has been entered, click the **Save** button. This Requisition is saved in **Open** Status.
12.	At this point, the user has the option to **Pre-Budget Check** the requisition. When running a budget pre-check, the budget processor performs a budget check but it does so without posting to the general ledger records and will not pre-encumber funds. The pre-budget check feature is specifically intended to check one document but does not update the Commitment Control tables (ledger and activity log). This does not guarantee these funds will be available at the time the Budget Check is initiated (following approvals). When you perform budget pre-check only processing, the statuses of *Provisionally Valid* or *Error* on the transaction pages indicate whether a budget is available. If you click the pre-check budget link and if the budget check is valid, then the system sets the budget header status for the requisition to *Prov Valid*. If the budget check is not valid, then the system sets the budget header status to *Error* with a link to the Exception page. To perform the pre-budget check, click the **Pre-Check Budget** icon.
13.	Click the **Submit For Approval** icon.
14.	This Requisition is now in a **Pending Approval** Status. ***Note:*** *A Requisitioner with the authority to approve requisitions would see as status of "Approved" when taking this action.*

15.	Once a Requisition is **Approved** it is ready to be **Budget Checked**. *This action will depend on the user's authority.* A requisition in an Approved status would be ready to be sourced into a PO by a Buyer, manually, or a batch process.