Requisition Quick Reference

NAVIGATION: Purchasing – Requisitions – Add/Update Requisitions

Step 1: To create a Requisition, click Add on the "Add a New Value" tab.

Step 2: The Requisition Form page is displayed. Click the Requisition Defaults link to enter the information that will apply to the entire Requisition.

Step 3: The Requisition Defaults page is displayed. Enter the Buyer.

Step 4: Click the Vendor Lookup link to search for the Vendor Number or enter the Vendor Number and Vendor Location if you know it. We are looking for the **order address**. ("**O**" order address).

Step 5: Enter the Due Date. The Due Date is always the date you are creating the Requisition.

Step 6: Enter the Speed Chart (this is the Speed Type)under Distribution.

Step 7: Enter the Description of the first item to be purchased. NOTE: The Description field is only 254 characters long. For longer items with longer descriptions, enter a short description here and the rest of the description on the Line Comments page. click the .**Click the "Send to Vendor" box** so the comments will print on the Requisition.

Step 8: Enter the Quantity you are ordering.

Step 9: Enter the UOM (Unit of Measure).

Step 10: Enter the Category Code which is a numeric value for the type of item being ordered. The term "Commodity Code" is synonymous with Category Code.

Step 11: Enter the Price of the item. Once you tab out of the field, the Merchandise Amount will populate.

Step 12: Click on the "Ship To/Due Date" tab and change the "Ship To" address to PEARLAND if you are creating this Requisition on behalf of Pearland and delivery will be to the Pearland Campus.

Click Save to save the requisition. A Requisition ID is now assigned.

Step 13: Click the Add Comments hyperlink in the Header section of the Form tab to enter comments related to the entire Requisition. These comments will be printed on the Requisition Coversheet.

Check the "Send to Vendor" box if these comments are to be printed on the requisition. **IF THIS BOX IS NOT CHECKED, THE COMMENTS WILL NOT PRINT ON THE REQUISITION**.

Click OK to return to the Form page. Click Save to save the requisition changes.

Step 14: Click the budget check button at the top of the Requisition on the Forms tab.

Step 15: Click the Add New Document button on the Documents tab.

Step 16: Click on the Approval tab.

Step 17: Choose a "Route To" Approval Path.

Step 18: Change the Source that has defaulted **only if** the Requisition is to be redirected to another area for approval. If the Requisition is not being redirected, allow the Source to default in.

Step 19: Choose "Approve" for the Approval Action from the drop down box and click Apply to process the workflow action. Click OK .