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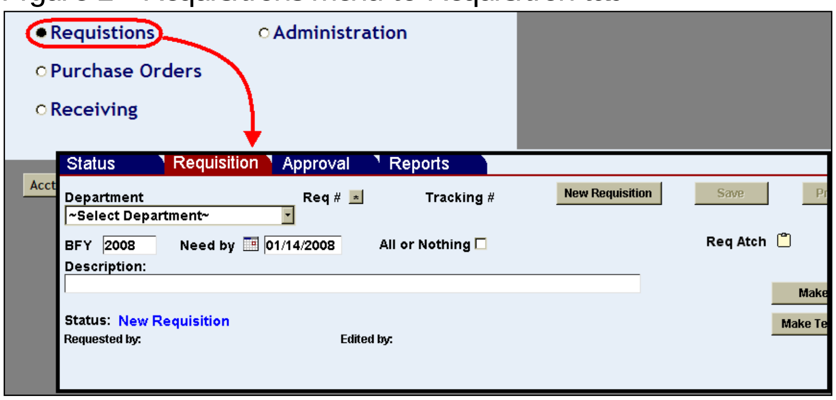
PURCHASING USER MANUAL

CREATE A REQUISITION

INTRODUCTION

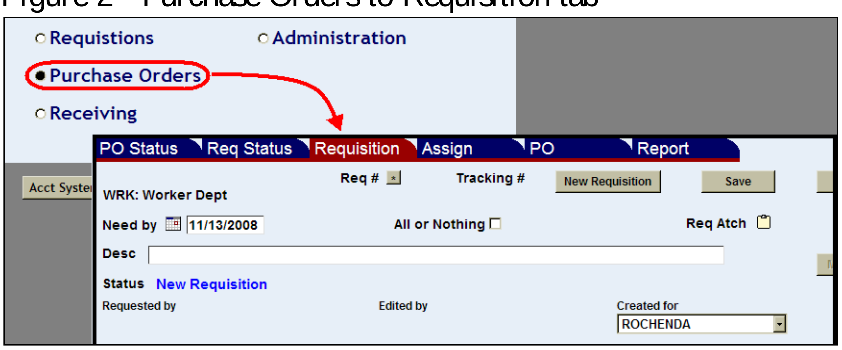
A requisition is required in order to create a purchase order. Any requester can create a requisition from the **Requisitions** menu, **Requisition** screen. A requester can also create a requisition from a template that has been saved.

Figure 1 - Requisitions menu to Requisition tab



A Purchaser can create a requisition from the **Purchase Orders** menu, **Requisition** screen. A Purchaser can also create a requisition on behalf of another person. A Purchaser's requisition must be approved through the **Requisitions** menu, **Approval** tab or authorized, if required by the agency's process, on the **Requisitions** menu, **Requisition** screen).

Figure 2 - Purchase Orders to Requisition tab



CREATE AND SAVE A REQUISITION

There are no required fields to initially save a requisition, although your agency, as part of the agency's business rules, may require certain fields for you to complete.

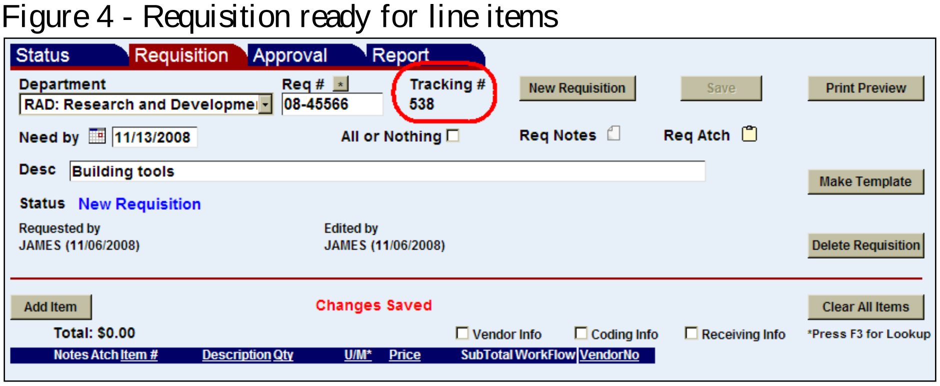
ENTER REQUISITION HEADER INFORMATION

1. Click the **Requisition** tab and enter "header" information – the department, the requisition number, notes, etc. Depending on your agency's processes, select or enter the following:
2. If your agency has created requisition departments, select a **Department**.
   - If you belong to only one department, it will be displayed by default.
   - If your agency has not created requisition departments, there will be no **Department** menu and one is not required.

Figure 3 - Requisition Department

3. Enter a requisition number in the **Req #** field. If your administrator set up automatically assigned requisition numbers, this field will not be displayed.
4. Type a description in the **Description** field. Do not use special characters or symbols, including **&**, ', **"**, <, and \.
5. Click **Save**. A tracking number (**Tracking #**) is automatically assigned so that the document can be tracked in the application. If the Requisition Department is manually entered, it won't be saved yet. If the Requisition Number is automatically assigned, it will not be assigned yet.

Figure 4 - Requisition ready for line items



6. Click **Delete Requisition** if you decide to delete the requisition after you have saved it, but before the Itemization is complete.

ADD PURCHASE REQUIREMENTS, NOTES, ATTACHMENTS

Other information can be added if needed for your particular situation or your agency's purchasing processes.

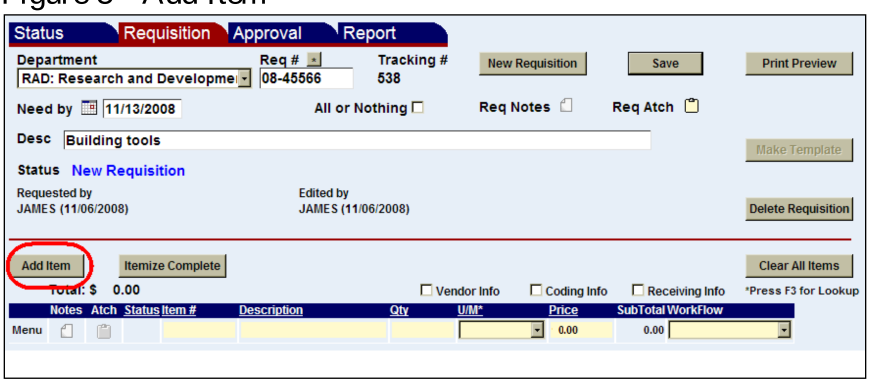
1. Enter a **Need by** date or select a date using the calendar icon. This will indicate to the purchaser that you want to have your request fulfilled by that date.
2. Check the **All or Nothing** check box, if desired. This will indicate to the purchaser that you require all of the items in your requisition, and if they cannot be purchased together, then the items should not be purchased.
3. Click the **Req Atch** icon to attach scanned documents applicable to the requisition in general. You can add attachments at any time in the process. NOTE: You can also attach documents to an individual line item using the **Atch** icon next to it. See Attaching Scanned Documents.
4. The **Req Notes** icon becomes available after you click **Save**. Click the icon to add comments in general or notes for the purchaser, or whatever is applicable to the requisition. Do not use special characters or symbols, including **&**, ', **“**, <, and \. You can also add notes to an individual line item using the **Notes** icon next to it.
5. Click **Save** when finished adding additional information.

ADD LINE ITEMS TO THE REQUISITION

Once the requisition is saved, you can add items to it.

1. Click **Add Item**. A grid will be displayed for you to enter line item details.

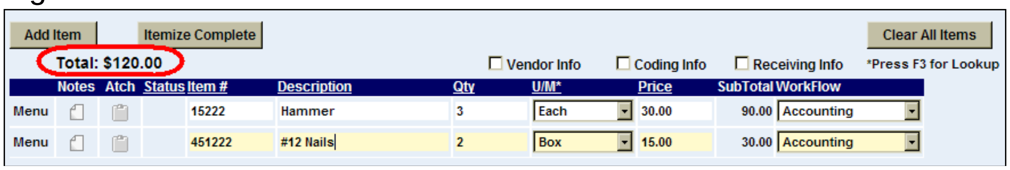
Figure 5 - Add Item



2. Enter the **Item #**. This could be a product number, catalog number, model number, etc.
3. Enter or edit a description in each **Description** field as needed. Do not use special characters or symbols, including **&**, ', **“**, <, and \.
4. Enter a quantity in the **Qty** field.
5. Select a unit of measure from the **U.M.** menu, e.g., Each, Box, Dozen, etc. (Select **More…** in the menu to select from all of the available units of measure.)

6. Enter the price for a single unit of measure in the **Price** field. The **SubTotal** field will automatically calculate the **Price** multiplied by the quantity (**Qty**).
7. If known, select a workflow from the **Workflow** menu. (A Workflow is not required until fiscal coding is completed.)
8. Continue to click **Add Item** to add as many items needed for your requisition. The total amount of the requisition will be displayed.

Figure 6 - Total amount



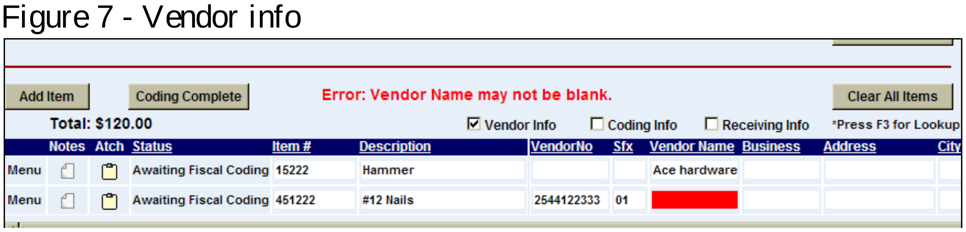
9. If you want to save the requisition and line items so that you can finish it later, click **Save**.
10. If you are finished adding items to the requisition, click **Itemize Complete**.
11. If you need to remove all the items, click **Clear All Items**. The “header” information – the department, the requisition number, notes, etc. – will remain.

ADDITIONAL LINE ITEM ACTIONS

1. To delete a line item or duplicate a line, click **Menu** next to that line item. NOTE: All line item menu options will be available after you click **Save** (see the Requisition Line Item Menu section below).
2. If needed for your agency’s process, check the **Vendor Info** check box and enter a vendor name and address.
   - Enter just a vendor name and the application will save it. The purchaser can then use this to look up the actual vendor number.
   - Enter a valid vendor number and suffix and press TAB, the application will automatically enter the vendor name and address.
   - Enter an ‘invalid’ vendor number/suffix, but you must then also enter a vendor name.

   The purchaser may add or update the vendor information with the actual vendor number and vendor name when a purchase order is created. Click **Save** when finished adding vendor information.

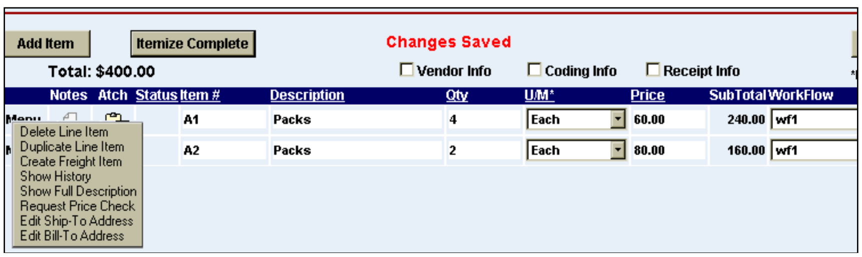
Figure 7 - Vendor info



3. Click **Void Requisition** if you need to void it before it gets approved. (After it is final approved the status will be "Ready for purchasing" and the purchaser must cancel the requisition items.)
4. If your agency has created requisition departments, and you have not yet selected a **Department**, you will be prompted to do so.
5. The requisition will be "Awaiting Authorization" or "Awaiting Fiscal Coding", depending on how your Purchasing administrator has set up your agency.
6. If you are a "Coder" in the application, continue with [entering fiscal coding on the requisition](#).

LINE ITEM MENU FUNCTIONS

After saving a requisition with line items added, you can use the line item **Menu** for a variety of functions. (Prior to saving, you can only delete or duplicate a line or show the history or the full description.)



The menu functions include:

- Click **Delete Line Item** to delete the line item.
- Click **Duplicate Line Item** to create another row that is a duplicate of that line.
- Click **Create Freight Item** to create another row to enter freight charges separately. This line will be associated to the line item selected. The purchaser will not have to select this row to add to a purchase order – it will be part of the requisition line item.
- Click **Show History** to view the actions taken on the requisition.
- Click **Show Full Description** to see the complete text of the **Description** field. You can also double-click the **Description** field to show the complete description.
- Click **Request Price Check** to send an alert to a purchaser to verify the cost of that line item.
- Click **Edit Ship-To Address** to select a specific shipping address from a list that is maintained by your agency's Purchasing administrator. Only required if you do not want to use the default address or if no default address is present.
- Click **Edit Bill-To Address** to select a specific billing address from a list that is maintained by your agency's Purchasing administrator. Only required if you do not want to use the default address or if no default address is present.

DELETE OR VOID A REQUISITION

1. Click **Delete Requisition** if you decide to delete the requisition after you have saved it, but before the Itemization is complete.
2. After itemization is completed, click **Void Requisition** to void it before it gets approved.
3. After the requisition is final approved, the status will be “Ready for purchasing” and the purchaser must cancel the requisition items.