Create Requisition

Procedures for Creating a Requisition which results into a purchase order.

Navigation

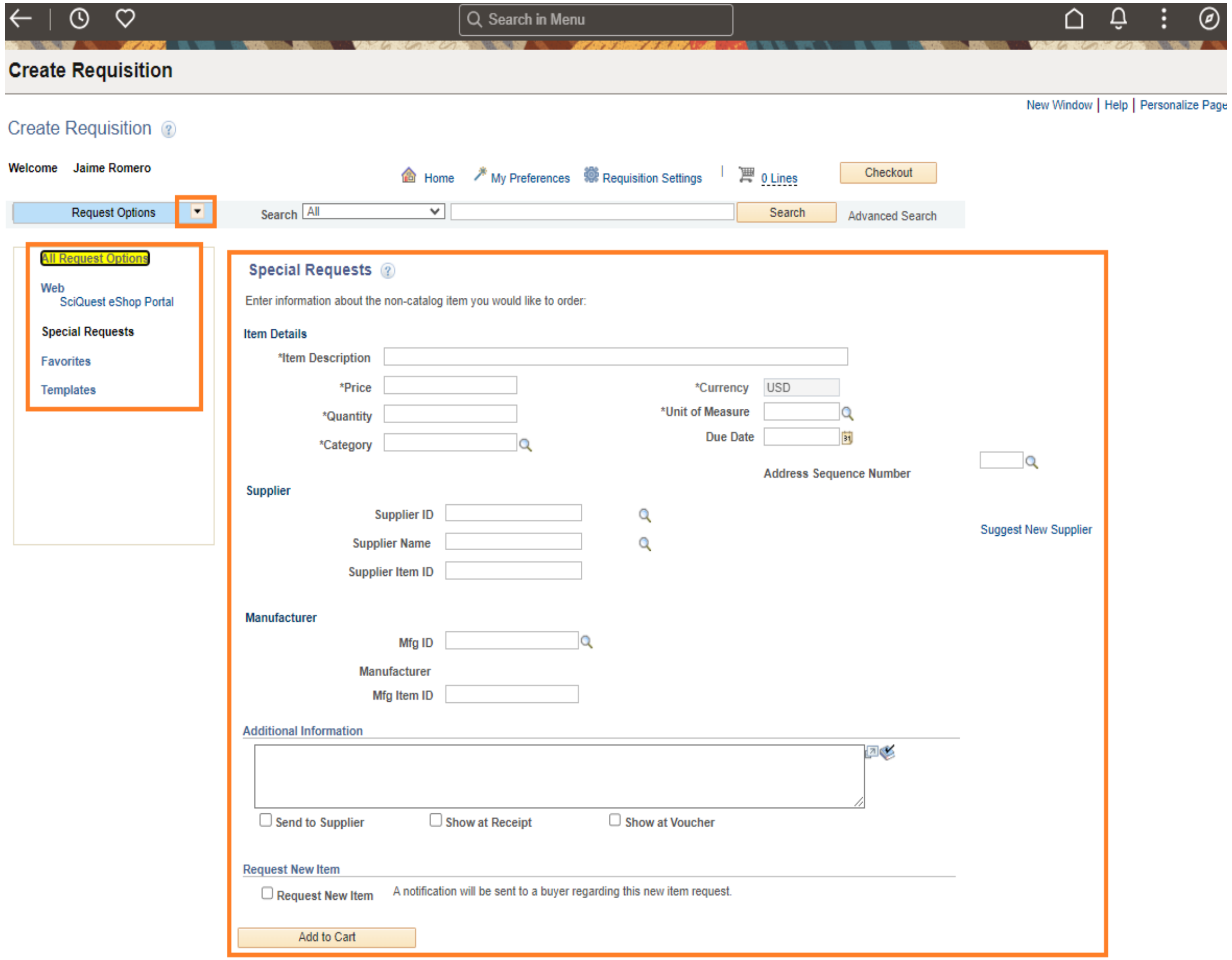
- NAV BAR
- MENU
- FINANCIALS
- E-PROCUREMENT
- CREATE REQUISITION

Create Requisition: Home Page

The **Create Requisition** screen will have the Special Request form available as the default home screen. You can access eSHOP, Templates, and Favorites by expanding the Request Options to the left of the page, if needed it is not already expanded.

User Guide for Making eSHOP Purchases

https://www.uttyler.edu/procurement-services/files/user-guide-eshop-purchases.pdf

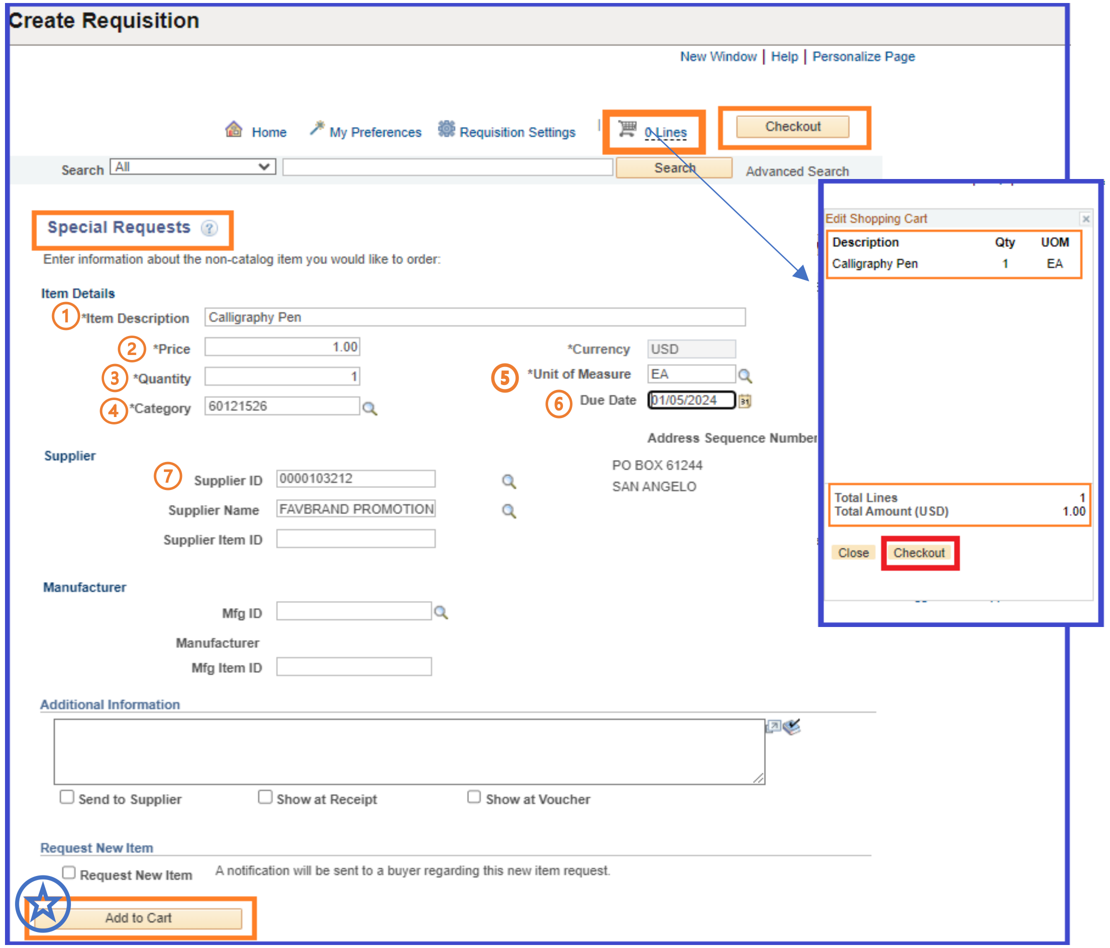


Create Requisition: Special Requests

Fill out the **Special Requests** form to create requisitions for goods or services that are not included in eSHOP or shop by accessing the eSHOP Portal (SciQuest eSHOP Portal).

Enter Details (1-9→ Non eSHOP Requisition)

1. Enter the **Item Description**
2. Enter the **Price** for the non-catalog item
3. Enter the **Quantity**
4. Enter or search the **Category**
5. Enter or search the **Unit of Measure**
6. Enter or select the **Due Date**.
7. Enter or search the **Supplier ID** or the **Supplier Name**. If you fill out the Supplier ID, then the Supplier Name will auto-fill and vice versa
8. Enter or search the **Mfg ID**, if applicable
9. Enter or search the **Mfg Item ID**, if applicable
10. Under **Additional Information**, enter additional comments
11. Check the appropriate boxes
12. Click **Add to Cart** to add to your shopping cart



Checkout

- The cart icon gives you a line count in your shopping cart. The summary of your cart will display to the right if you click on the link.

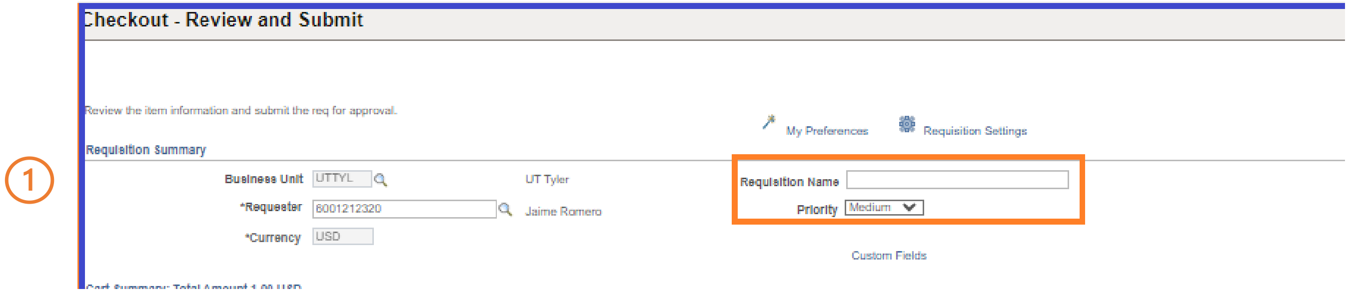
Note: Steps 1-9 are excluded from eSHOP purchases. Please see the link below for eSHOP job aid. https://www.uttyler.edu/procurement-services/files/user-guide-eshop-purchases.pdf

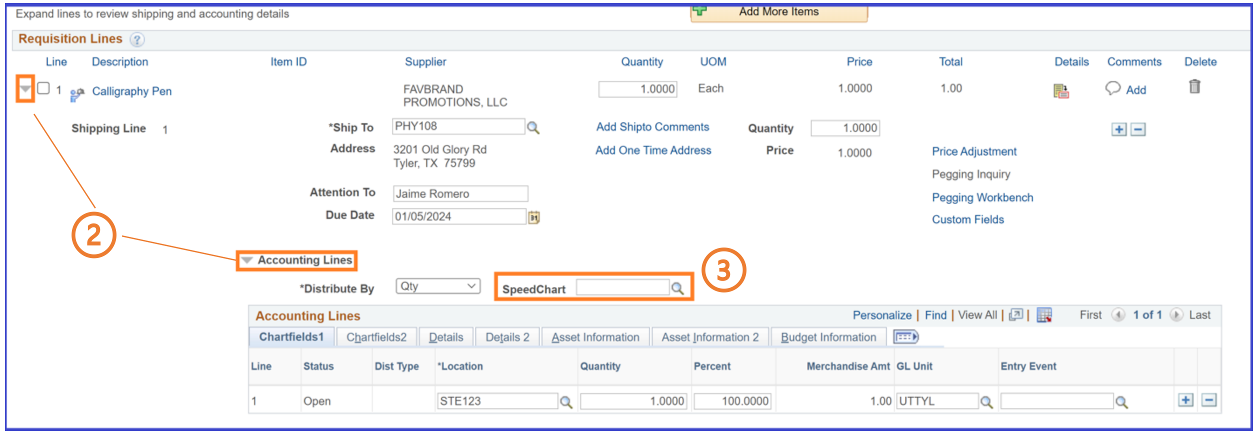
Create Requisition: Checkout-Review and Submit

Review your Requisition. The fields are generally the same for the Checkout-Review and Submit page. There are some additions highlighted below.

1. Enter **Requisition Name**.
2. Expand the details using the **arrow** next to the Requisition Line to modify the Accounting Lines.
3. Use the **SpeedChart** to auto-populate Chartfield values.
4. Enter **Requisition Comments and Attachments** here or **Approval Justification**.
5. Check the appropriate boxes.
6. Click **Add More Items** if you wish to go back and add more non-catalog items.
7. Click **Save for Later** if you wish to save and modify this requisition later.

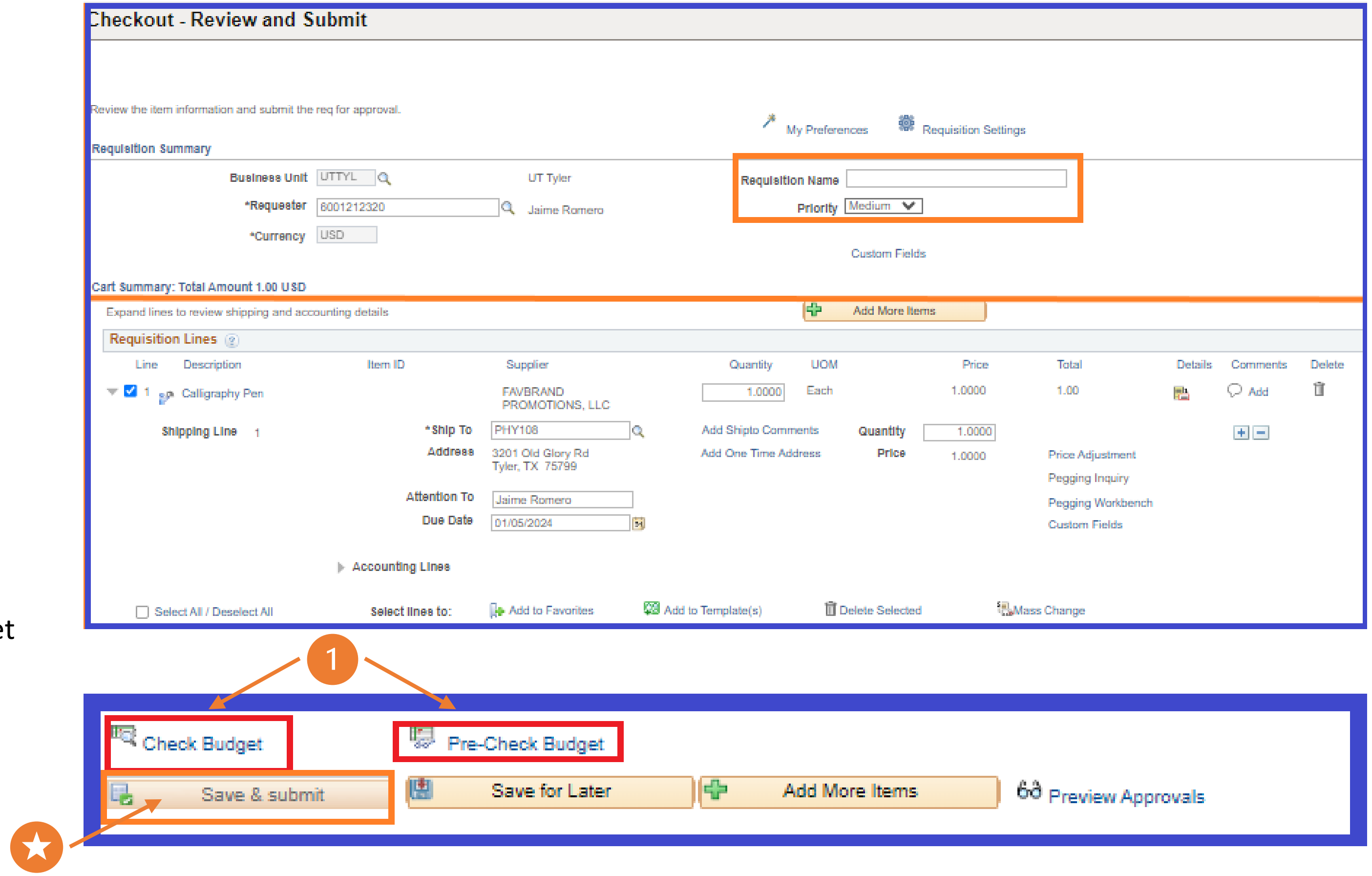
NOTE: All steps included on slide 5 will need to be completed for eSHOP and non-eSHOP requisitions.





Create Requisition: Checkout-Review and Submit (Continued)

1. Use the **Pre-Check budget** or **Check Budget** link to validate available funds. Using the pre-check budget will initiate the budget processor and check the budget without reserving funds. The check budget feature will apply a pre-encumbrance for this requisition (if valid). See the budget checking section (Slide 8) for more details.
2. Once you have reviewed your requisition there is an option to Save it for Later.
3. If you are ready to submit the requisition, click **Check Budget**. Once you receive a Valid status, click **Save and Submit** for approval workflow.
4. If you receive a Budget Error, proceed to slide 9 for further instructions.



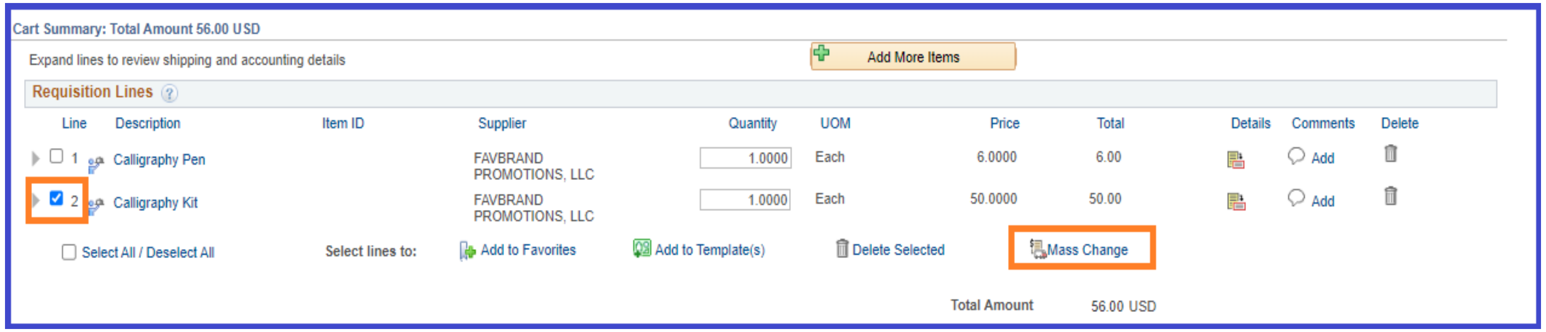
NOTE: All steps included on slide 6 will need to be completed for eSHOP and non-eSHOP requisitions.

Create Requisition: Mass Change (Optional)

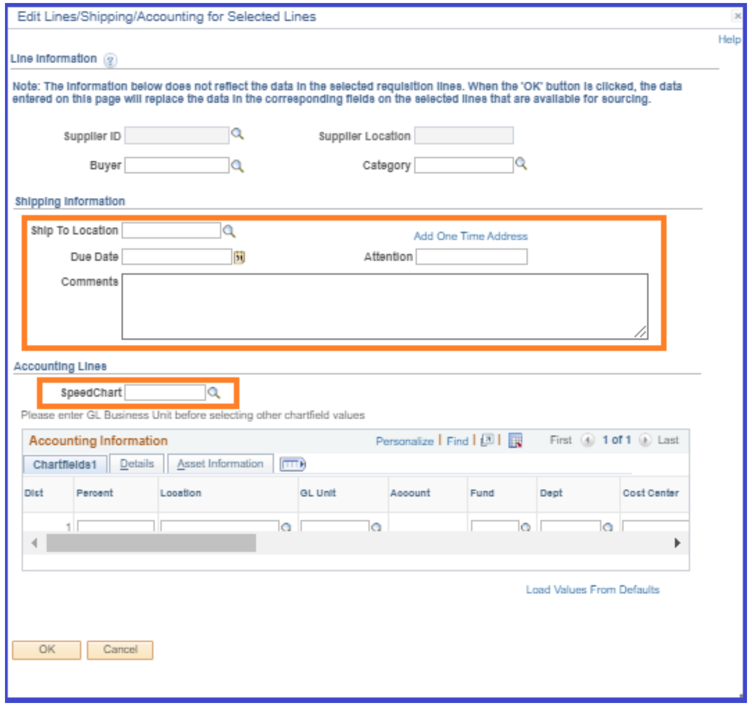
<u>Mass Change</u> is an optional method to enter Shipping/Accounting details for selected lines, where you can change the shipping location, delivery date, and so on. It is also the best way to Modify multiple lines for any requisition using the same distribution chartfield.

1. Select the line or lines you wish to change. Once lines have been selected, click **Mass Change.**
2. Enter **Ship to Location**, **Due Date, Attention,** and **SpeedChart**. Add additional comments if needed.
3. Select the appropriate option fitting your needs for the Distribution Change. Select **OK**

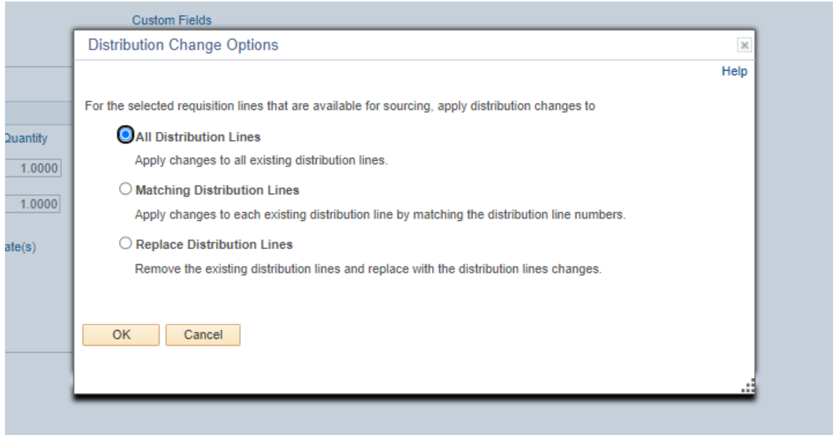
1



2

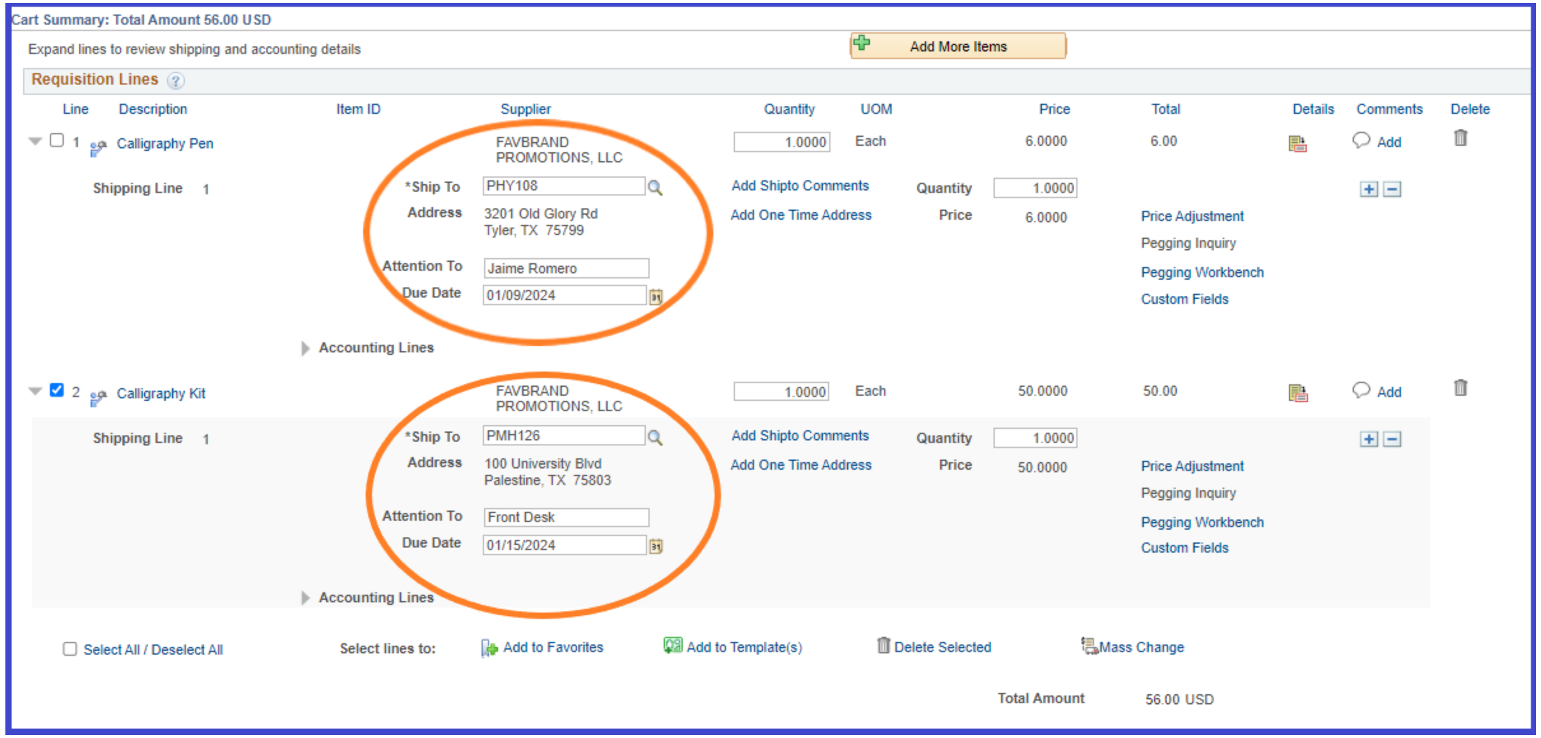


3



Create Requisition: Mass Change (Optional) Continued

As steps 1-3 are completed on slide 7, you will return to the Review and Submit summary. The image below reflects line 2 has been changed per **Mass Change**. You can proceed with the remaining steps on slides 5 and 6.



Budget Checking

- Budget Check is the term used to describe the PeopleSoft system's process of checking a purchase against a budget prior to committing to a vendor. The difference between a Budget Check and a Pre-Check Budget is that a pre-encumbrance (funds reduced from budget) is not recorded for a pre-budget check and is recorded for the budget check process.

- Using a Pre-Check Budget if the funds are available for the purchase, the system will indicate that the budget status is *Provisionally Valid* meaning that the funds are available at the time the check was done but they have not been encumbered.

- Using Budget Check if the funds are available for the purchase, the system will indicate that the budget status is *Valid* meaning that the funds are available at the time the check was done and funds have been pre-encumbered.

- If the funds are not available (Pre Budget-Check or Budget Check), the system will display an error and the purchase requisition will not move forward.

Budget Statues

Budget Statues are as follows:

- *Not Chk'd (not checked)* - This is the requisition's initial budget-checking status. The status may also return to this value after a value change that affects the budget status.
- *Provisionally Valid* - The Pre-Budget Check process has verified that the funds are available, but the funds have not been encumbered,
- *Valid* - The requisition has been successfully budget-checked and the funds have been encumbered.
- *Error* - The requisition has failed budget checking. The text is enabled as a link, which you can click to access the Requisition Exceptions page where you can view budget check exceptions for this requisition. Users with appropriate authority can override the budget exceptions on the Requisition Exceptions page.

If you receive a budget error, please email budget@uttyler.edu to review and override the error. Once you have a Valid budget, submit the requisition to the budget authority for approval.

Q & A

What happens after the requestor submits a requisition with a Valid budget?

- The requisition will route through workflow, awaiting Budget Authorities approval.

What happens after the Budget Authority approves a requisition? (Two Parts)

- Once a Budget Authority approves a requisition under $15,000.00, it will auto-dispatch a purchase order to the requestor by email.
- Once a Budget Authority approves a requisition over $15,000.00, it will move into a Pending purchase order status. Procurement Services will need a signed executed agreement *if applicable* and all supporting documents for approval. Upon approval, the purchase order will be emailed to the requestor to be forwarded to the supplier.

Procurement Services

purchasing@uttyler.edu