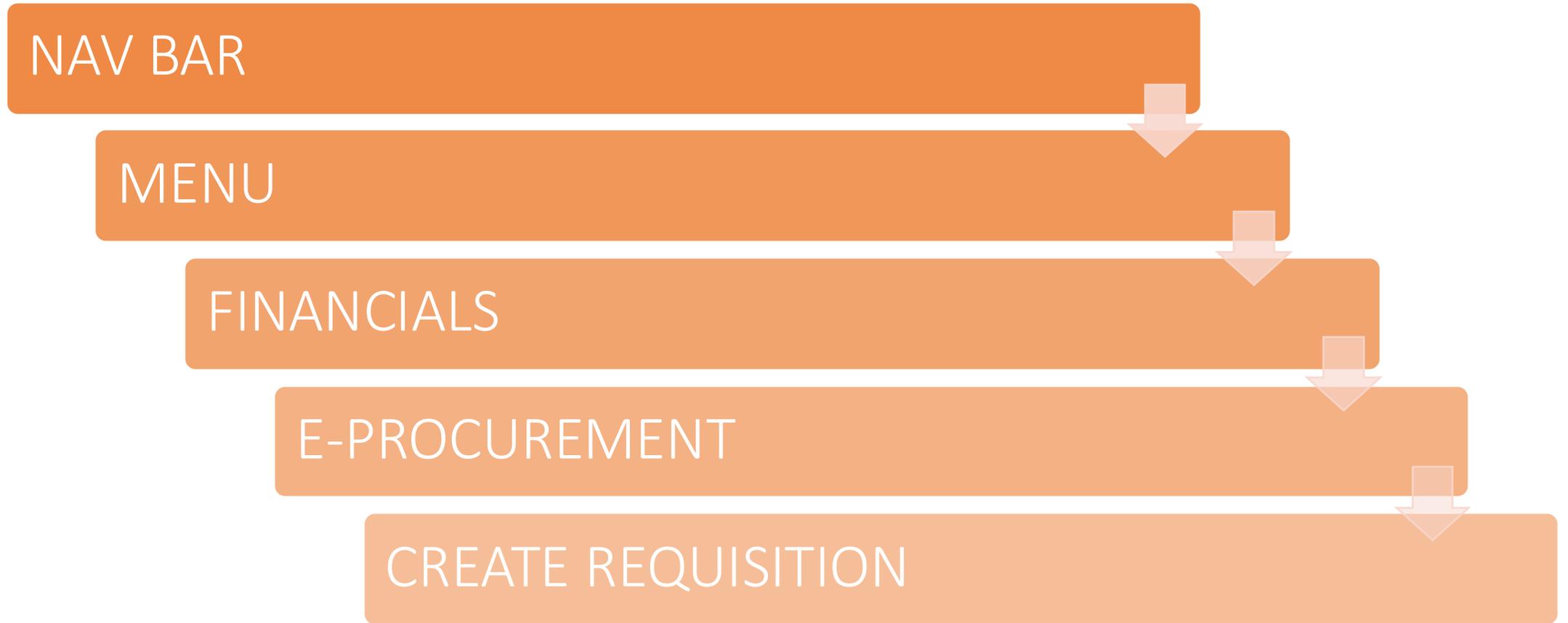


Create Requisition

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

Navigation



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.utt Tyler.edu/procurement-services/files/user-guide-eshop-purchases.pdf>

The screenshot displays the 'Create Requisition' interface. At the top, there is a navigation bar with a search bar and icons for home, notifications, and user profile. The main header includes the user's name 'Jaime Romero' and navigation links for 'Home', 'My Preferences', 'Requisition Settings', and 'Checkout'. A 'Request Options' dropdown menu is open, listing 'All Request Options', 'Web', 'SciQuest eShop Portal', 'Special Requests', 'Favorites', and 'Templates'. The 'Special Requests' form is the central focus, with sections for 'Item Details', 'Supplier', 'Manufacturer', and 'Additional Information'. The 'Item Details' section includes fields for *Item Description, *Price, *Quantity, *Category, *Currency (set to USD), *Unit of Measure, and Due Date. The 'Supplier' section has fields for Supplier ID, Supplier Name, and Supplier Item ID, along with a 'Suggest New Supplier' button. The 'Manufacturer' section includes Mfg ID and Manufacturer Mfg Item ID fields. The 'Additional Information' section features a large text area and checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. At the bottom, there is a 'Request New Item' checkbox and an 'Add to Cart' button.

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

The screenshot shows the 'Create Requisition' interface. At the top, there are navigation links: Home, My Preferences, Requisition Settings, **0 Lines** (shopping cart icon), and Checkout. Below this is a search bar with 'All' selected. The main section is titled 'Special Requests' with a help icon. It prompts the user to 'Enter information about the non-catalog item you would like to order:'. The form fields are numbered 1 through 9:

- 1. Item Description: Calligraphy Pen
- 2. Price: 1.00
- 3. Quantity: 1
- 4. Category: 60121526
- 5. Unit of Measure: EA
- 6. Due Date: 01/05/2024
- 7. Supplier ID: 0000103212
- Supplier Name: FAVBRAND PROMOTION
- Supplier Item ID: (empty)
- Manufacturer Mfg ID: (empty)
- Manufacturer Mfg Item ID: (empty)

Additional information includes checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. At the bottom, there is a 'Request New Item' section with a checkbox and a note: 'Request New Item A notification will be sent to a buyer regarding this new item request.' An 'Add to Cart' button is highlighted with a blue star icon.

An 'Edit Shopping Cart' window is open on the right, showing a table with the following data:

Description	Qty	UOM
Calligraphy Pen	1	EA

Below the table, it shows 'Total Lines: 1' and 'Total Amount (USD): 1.00'. There are 'Close' and 'Checkout' buttons at the bottom of the cart window.

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.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: UTTYL UT Tyler

*Requirer: 8001212320 Jaime Romero

*Currency: USD

Requisition Name: [Red Box]

Priority: Medium

Custom Fields

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Calligraphy Pen		FAVBRAND PROMOTIONS, LLC	1.0000	Each	1.0000	1.00			

Shipping Line 1

*Ship To: PHY108

Address: 3201 Old Glory Rd, Tyler, TX 75799

Attention To: Jaime Romero

Due Date: 01/05/2024

Accounting Lines

*Distribute By: Qty

SpeedChart: [Red Box]

Accounting Lines Table:

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		STE123	1.0000	100.0000	1.00	UTTYL	

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

Add more Comments and Attachments

Approval Justification

Enter approval justification for this requisition

Check Budget Pre-Check Budget

Save & submit Save for Later Add More Items Preview Approvals

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.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: UTTYL UT Tyler

*Requirer: 6001212320 Jaime Romero

*Currency: USD

Requisition Name: []

Priority: Medium

Custom Fields

Cart Summary: Total Amount 1.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines (2)

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Calligraphy Pen		FAVBRAND PROMOTIONS, LLC	1.0000	Each	1.0000	1.00			
Shipping Line 1										
*Ship To: PHY108				Add Shipto Comments	Quantity	1.0000				
Address: 3201 Old Glory Rd Tyler, TX 75799				Add One Time Address	Price	1.0000		Price Adjustment		
Attention To: Jaime Romero								Pegging Inquiry		
Due Date: 01/05/2024								Pegging Workbench		
								Custom Fields		

Accounting Lines

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Check Budget Pre-Check Budget

Save & submit Save for Later Add More Items Preview Approvals

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

Create Requisition: Mass Change (Optional)

Mass Change 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**

Cart Summary: Total Amount 56.00 USD

Expand lines to review shipping and accounting details + Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Calligraphy Pen		FAVBRAND PROMOTIONS, LLC	1.0000	Each	6.0000	6.00		Add	
2	Calligraphy Kit		FAVBRAND PROMOTIONS, LLC	1.0000	Each	50.0000	50.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected **Mass Change**

Total Amount 56.00 USD

Edit Lines/Shipping/Accounting for Selected Lines

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID: Supplier Location: Buyer: Category:

Shipping Information

Ship To Location: Due Date: Attention: Comments:

Accounting Lines

SpeedChart:

Accounting Information

Chartfields1	Details	Asset Information	GL Unit	Account	Fund	Dept	Cost Center
1							

OK Cancel

Custom Fields

Distribution Change Options

For the selected requisition lines that are available for sourcing, apply distribution changes to

All Distribution Lines
Apply changes to all existing distribution lines.

Matching Distribution Lines
Apply changes to each existing distribution line by matching the distribution line numbers.

Replace Distribution Lines
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

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.

Cart Summary: Total Amount 56.00 USD

Expand lines to review shipping and accounting details + Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Calligraphy Pen		FAVBRAND PROMOTIONS, LLC	1.0000	Each	6.0000	6.00		Add	
Shipping Line 1		*Ship To	PHY108	Add Shipto Comments	Quantity	1.0000				
		Address	3201 Old Glory Rd Tyler, TX 75799	Add One Time Address	Price	6.0000		Price Adjustment		
		Attention To	Jaime Romero					Pegging Inquiry		
		Due Date	01/09/2024					Pegging Workbench		
								Custom Fields		
Accounting Lines										
2	Calligraphy Kit		FAVBRAND PROMOTIONS, LLC	1.0000	Each	50.0000	50.00		Add	
Shipping Line 1		*Ship To	PMH126	Add Shipto Comments	Quantity	1.0000				
		Address	100 University Blvd Palestine, TX 75803	Add One Time Address	Price	50.0000		Price Adjustment		
		Attention To	Front Desk					Pegging Inquiry		
		Due Date	01/15/2024					Pegging Workbench		
								Custom Fields		
Accounting Lines										

Select All / Deselect All Select lines to: + Add to Favorites + Add to Template(s) + Delete Selected + Mass Change

Total Amount 56.00 USD

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 Statuses

Budget Statuses 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

