REQUISITIONS for Purchase Orders

EERP Version 2021.12

Objective

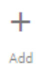
This document provides step-by-step instructions on how to requisition items using the REQUISITIONS program. This document is intended for experienced requisition users.

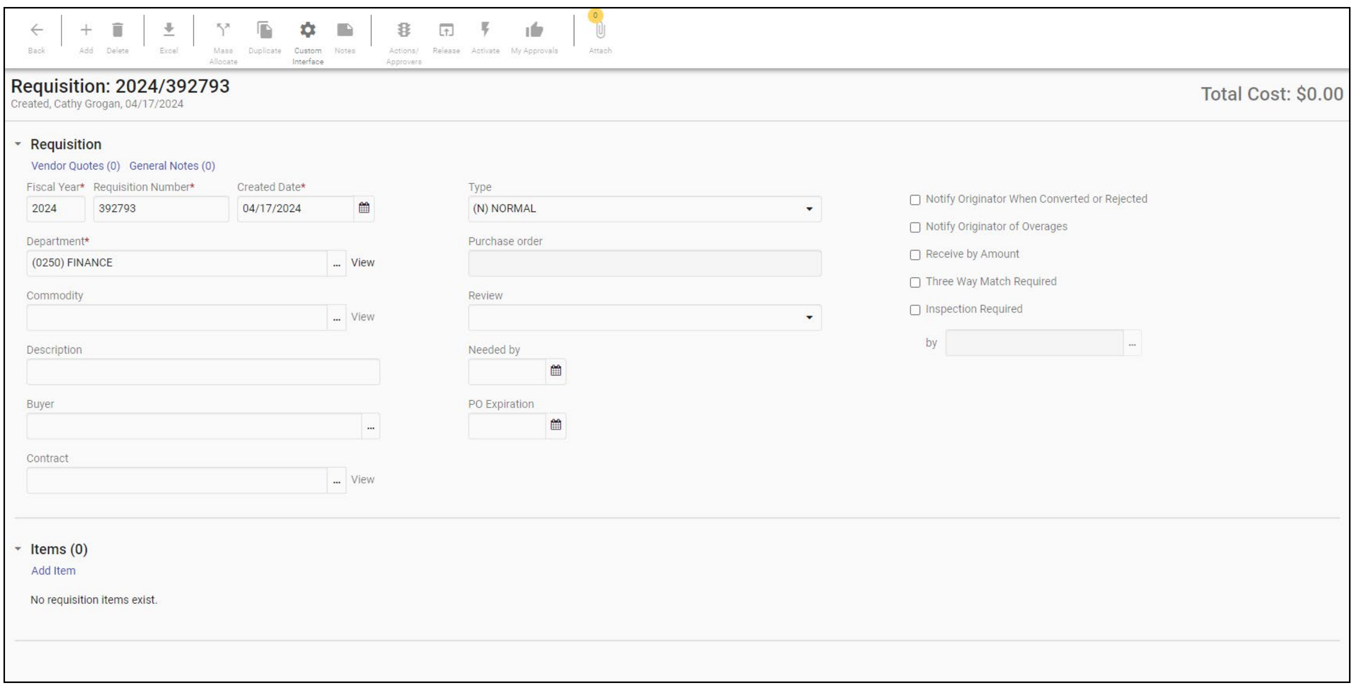
Overview

The REQUISITIONS page provides an alternate way to enter requisitions. Note that you can view Requisitions on either the Requisitions Entry or Requisitions page, regardless of where they are entered.

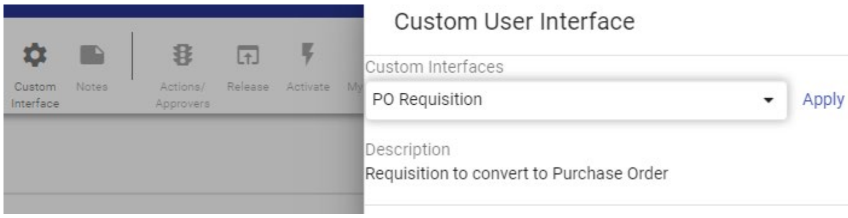
Procedure

Use the following steps to create a requisition for purchase order:

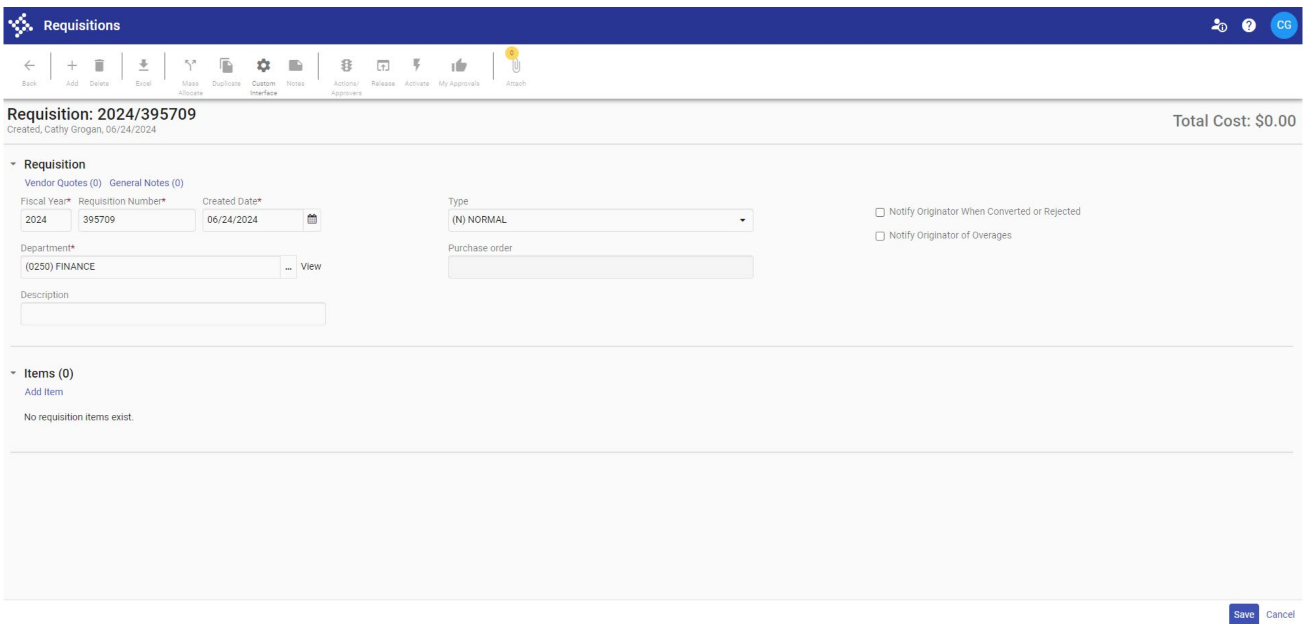
1. Open the Requisitions program *Financials>Purchasing>Purchase Order Processing> Requisitions*
2. Click Add. 



3. If you have not applied the Custom Interface for Purchase Orders, do it now by selecting Custom Interface/Pick Ticket/Apply



This will make your screen look like this:

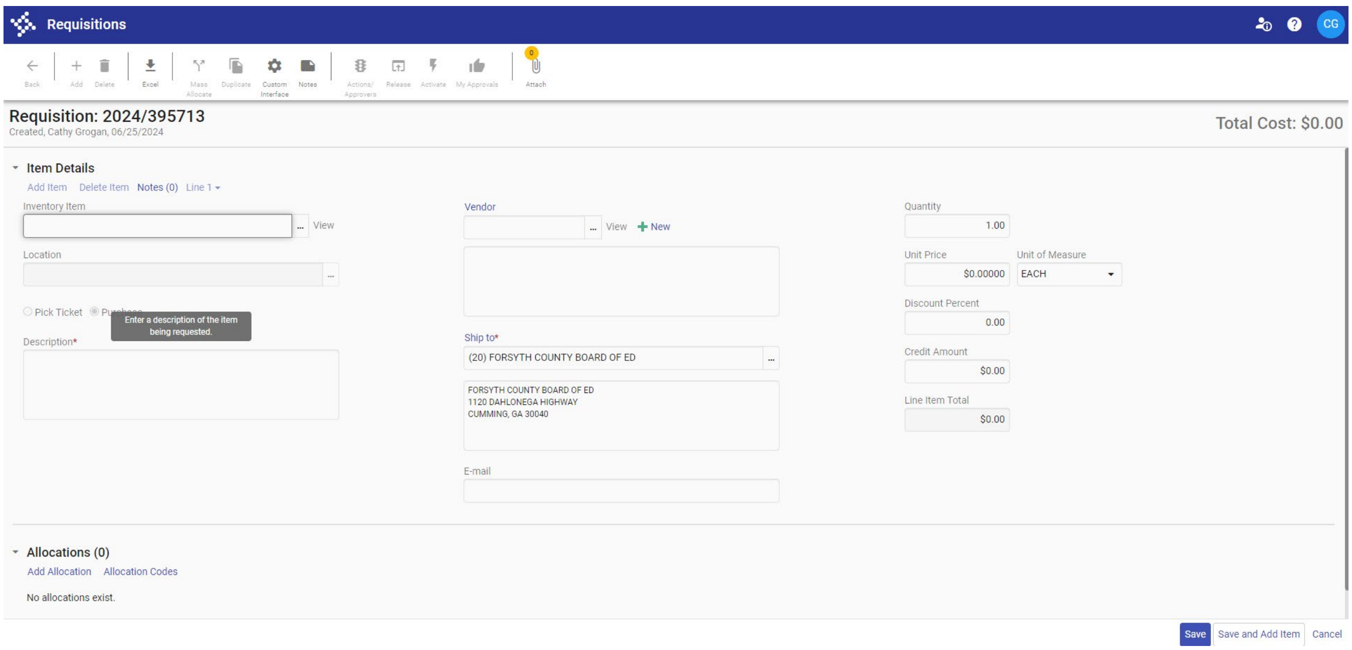


The interface will be applied until you remove it. You may toggle between this interface and the other options at any time.

4. Enter the following header information:

Fiscal Year	Will default to the current year
Dept/Loc	This will default to your department code. You may need to change this if you enter requisitions for multiple departments.
Requisition number	The system will auto-populate the field.
Description	**Type in a general description for the entire order.**

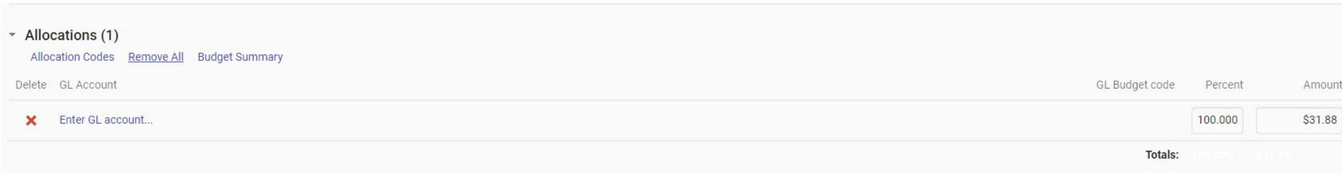
5. If you need to add Vendor Sourcing Notes, enter them using the ‘Vendor Quotes’ tab. These can be printed on the Purchasing Copy of your PO if specified. General Notes can be printed on the Vendor Copy of your PO if specified.
6. To add items to the Requisition, click on the Blue ‘Add Item’.



7. Enter the following for the fields:

Description	Use the vendor’s description for the item
Vendor	You may enter the vendor code or start to type the vendor name and select the vendor from the list.
Quantity	The default value is 1. Accept the default value or enter another value.
Price	Price of the item
Other Fields	Optional – Email

8. Once you have entered the Item, click on ‘Add Allocation’. You will see a prompt to ‘Add GL Account’. Click on this and add the appropriate Org/Object (and possibly Project).



NOTE: You may allocate item to no more than 50 org/object combinations. Org may default based on the department code.

Example. of ORG & Object # (XX represents your school/department number)

XX269990 561050

Once you have entered all information for this line item, click on 'Save and Add Item' in the bottom right of the screen to add additional items. Note that you can also delete a line after it has been entered. Click on 'Delete Item' in the top left of the screen if necessary. Click on 'Save' in the bottom right of the screen to complete the requisition.

Note that alternately it is possible to add all items and then Mass Allocate the Object/Org/Project IF all items are being charged to the same place. Simply save all items, and then click on 'Mass Allocate' at the top of your screen

9. To return to the Requisition Header screen, click Back .

10. Once you have entered all requested items and returned to the Requisition Header screen, click Release in the Menu of the Ribbon.  (Note that the status will update from allocated to released).

Results

The program starts the approval process for the requisition. Once a requisition has been released you can view it but cannot make changes to it. Once it is approved the status will be listed as 'converted' and the PO field will be visible on the header page.

Status Change

The status of a requisition changes depending on where it is in the process. The following are the status types for requisitions:

- A newly created requisition has a status of 2, which indicates that it is *created*.
- A requisition for which the line detail is complete has a status of 4, which indicates it is *allocated*.
- A requisition that has been released and/or approved has a status of 0, which indicates it is *converted* to a Purchase Order.

Note that to close out of the REQUISITIONS screen there is not a 'back' button. Once you are done on this screen simply close the tab in outlook for that screen.