Requisition Creation

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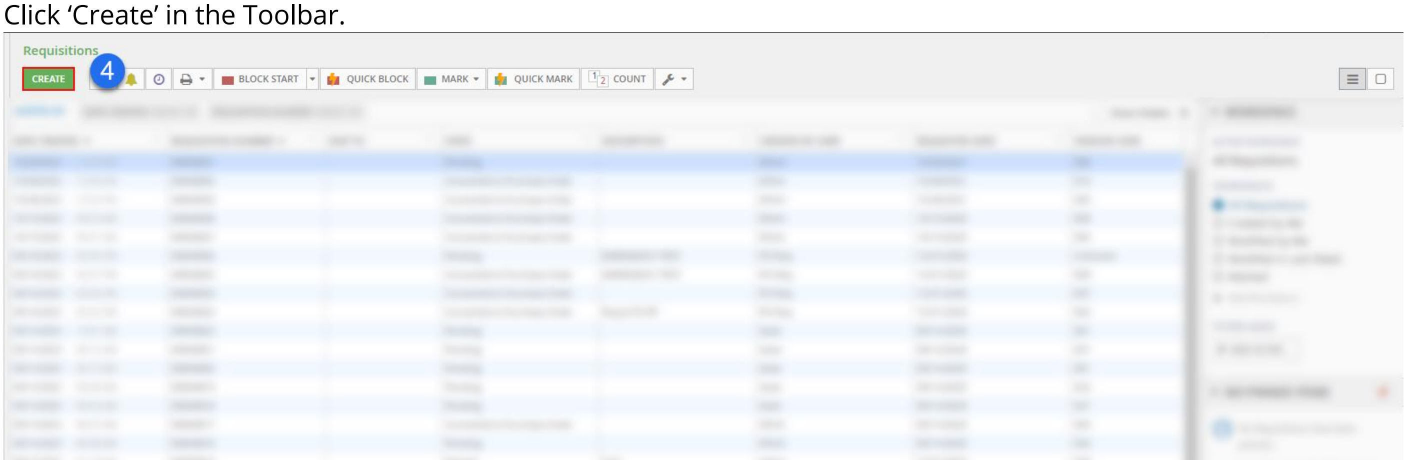
Creating a Requisition

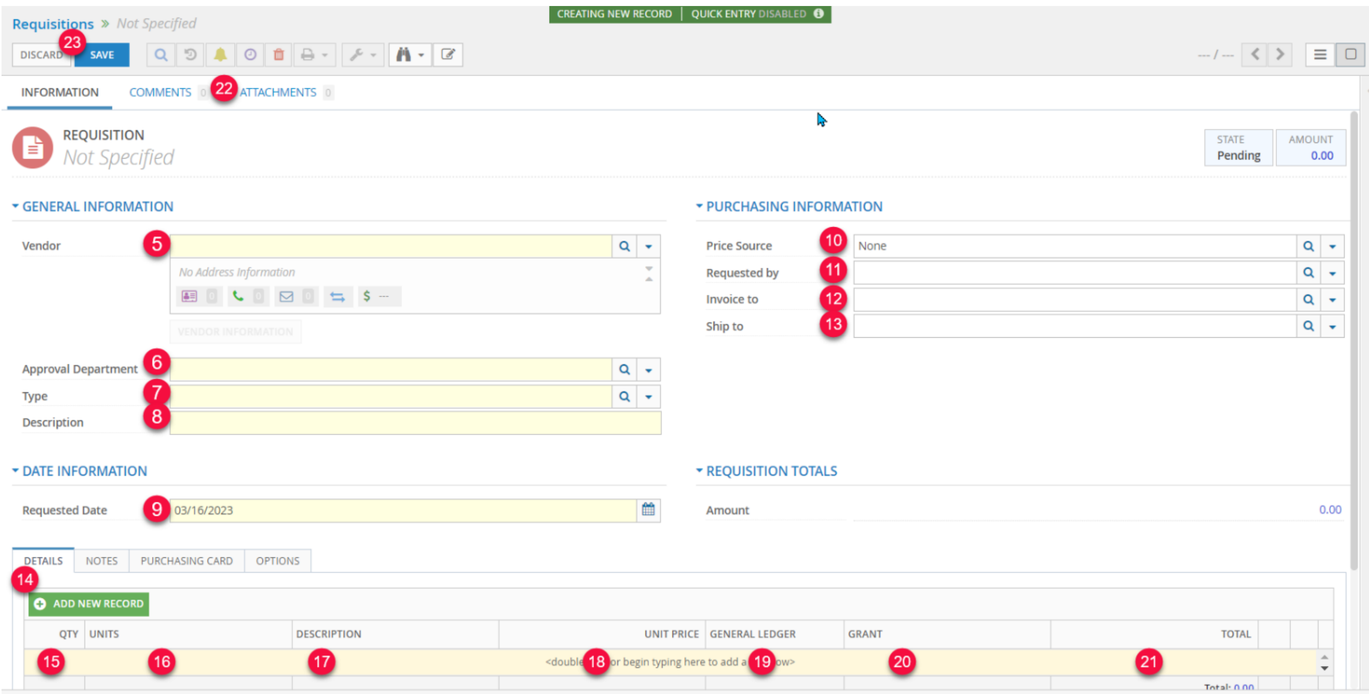
1. Click on the 'Purchase Order' Module in the Navigation Pane.
2. Click on the 'Views' Menu Item.
3. Click on 'Requisitions'.

4. Click 'Create' in the Toolbar.



5. Enter a value into the 'Vendor' field.
   a. NOTE: You can type in the vendor code or a portion of the Vendor Name into the field and it will search through the available vendor records to find any matches.
6. Enter a value into the 'Approval Department' field.
7. Verify/Edit the 'Type' field.
8. Enter a summary Description of the invoice. **This will be printed on the bill list**. Add any additional information to the notes tab.
9. Verify/Edit the 'Requested Date' field.
10. Enter a value into the 'Price Source' field (if applicable).
11. Enter a value into the 'Requested By' field (if applicable).
12. Enter a value into the 'Invoice To' field (if applicable).
13. Enter a value into the 'Ship To' field (if applicable).
14. Click 'Add New Record' or double click on the yellow line to add an item onto the Requisition.
15. Enter a value into the 'Quantity' field.

16. Enter a value into the ‘Units’ field (if applicable) or click the magnifying glass to see a full listing of the available options.
17. Enter a value in the description field.
18. Enter a value into the ‘Unit Price’ field.
19. Enter a value into the ‘General Ledger’ field or click the magnifying glass to see a full listing of the available options.
    a. You can enter a GL number or the line item description when searching.
20. Enter a value into the ‘Grant’ field (if applicable) or click the magnifying glass to see a full listing of the available options.
21. Verify the ‘Total’ column.
    a. To add an additional General Ledger Number to the requisition, repeat steps 13-19.
22. To add an attachment to the Requisition, click the ‘Attachments’ button in the Ribbon and ‘Upload’ from an existing file or ‘Scan’ using a Desktop Scanner.
23. Click ‘Save’.



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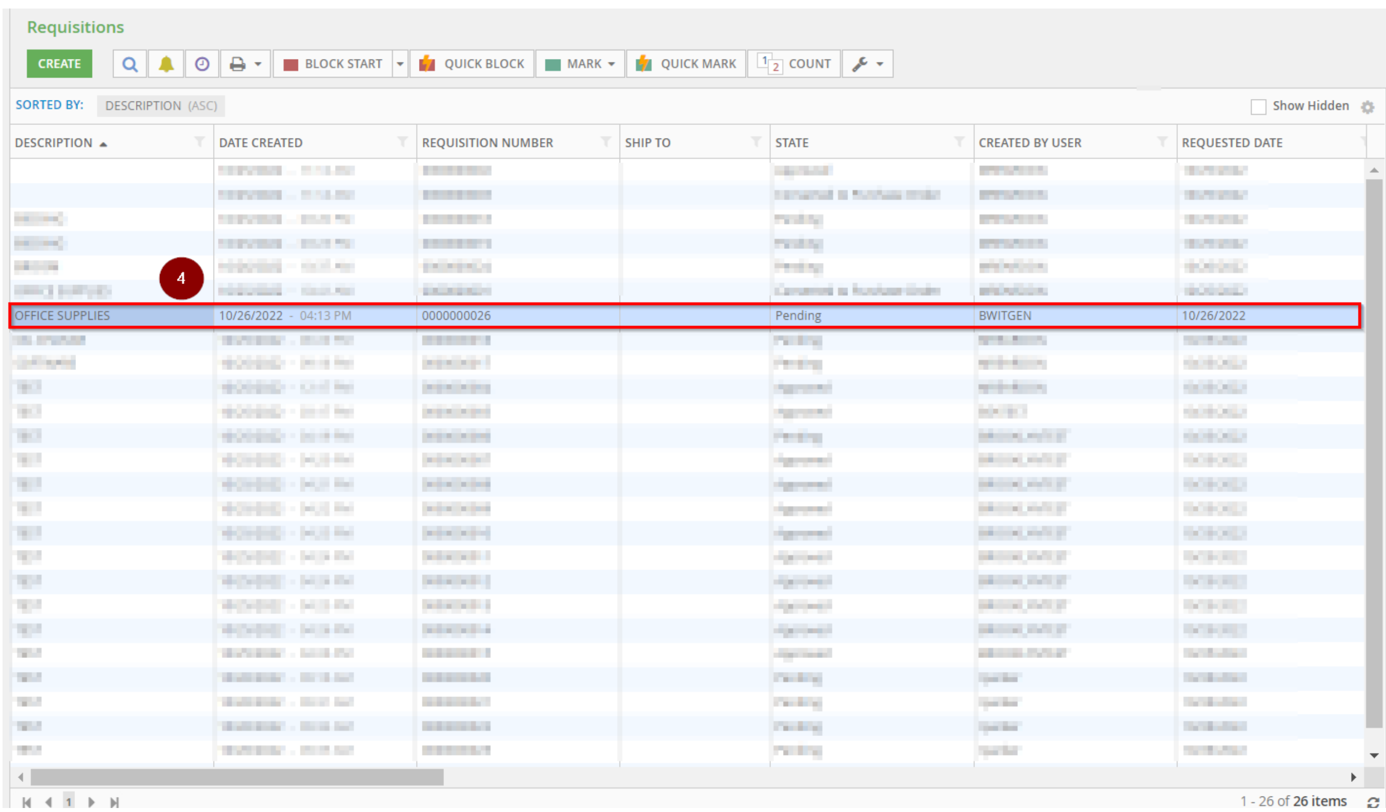
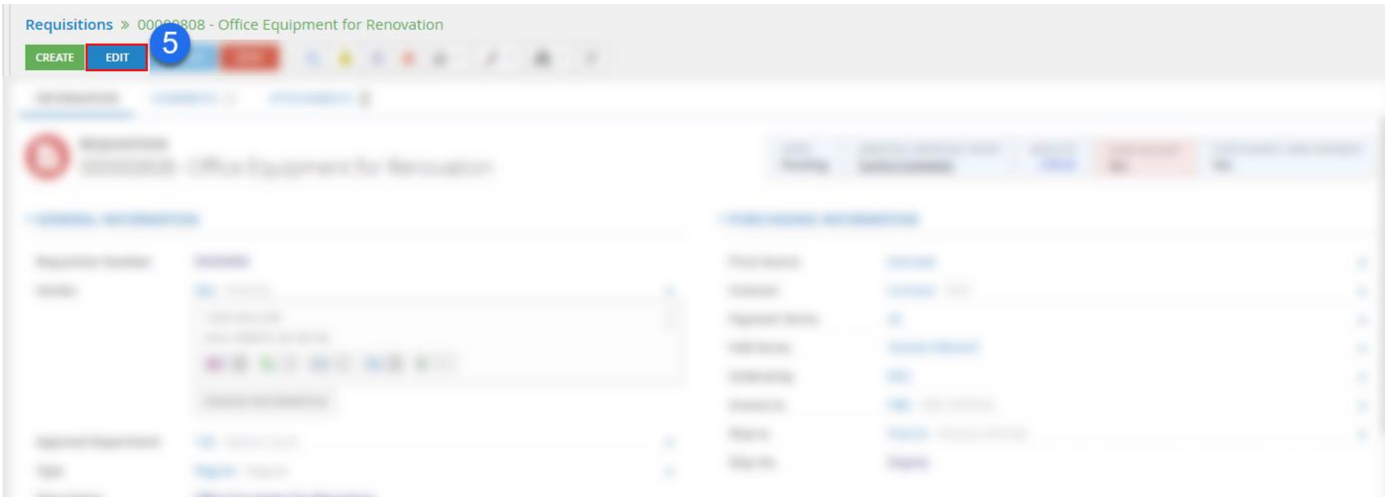
Editing a Requisition

1. Click on the 'Purchase Order' Module in the Navigation Pane.
2. Click on the 'Views' Menu Item.
3. Click on 'Requisitions'.

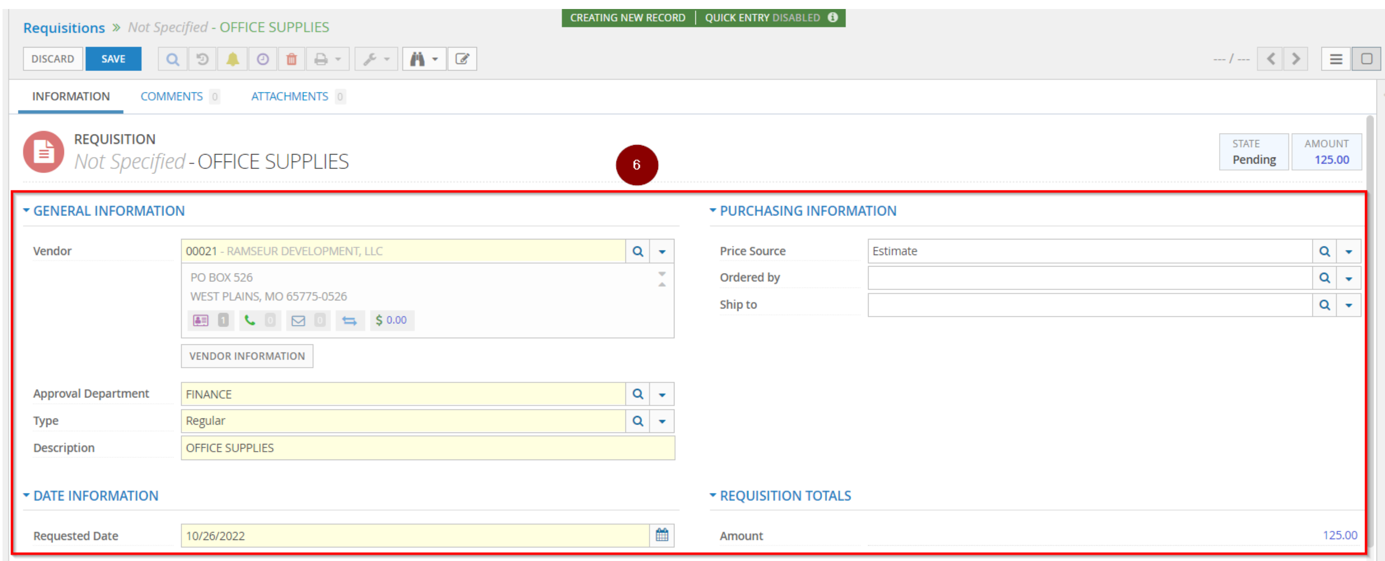
4. Once you have located the Requisition you would like to edit, double click on the record.



5. Click Edit in the Toolbar.



6. Modify the fields/items you wish to edit.



7. Click the ‘Save’ Button in the Toolbar.