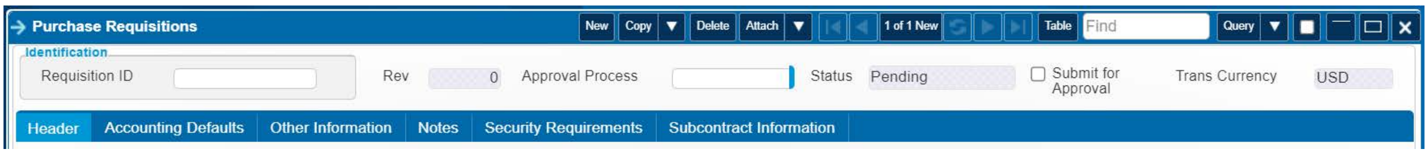
Entering Purchase Requisitions (streamlined directions)

This Streamlined Directions document details the primary required elements of a requisition only. For more options and information on the requisition screen, please see the Manage Purchase Requisitions directions document.

Materials → Procurement Planning → Purchase Requisitions → Manage Purchase Requisitions



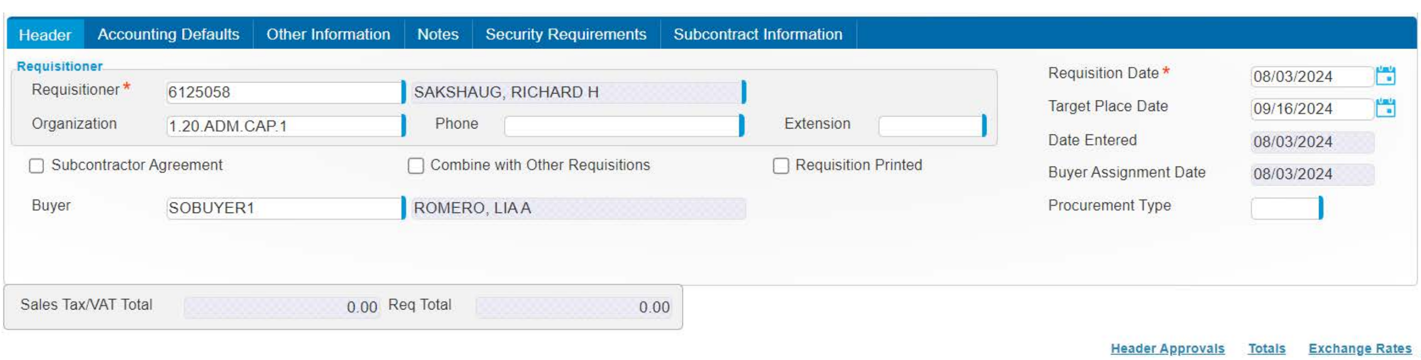
Identification

1. **Requisition ID**: This number will auto-assign when the requisition is Saved.
2. **Approval Process**: Use this field to enter or use to select the approval process code for this requisition, if applicable. Once you have submitted a requisition line for approval, you cannot modify this code.
    a. Approval processes (routes) are based on the AUI/NRAO organization chart and Budget Authority List. The Budget Authority List with the full list of Approval Processes is located at: https://info.nrao.edu/oas/cap/budget-authority-list-and-requisition-approval-processes/.
    b. If the requisitioner needs guidance on selecting an Approval Process, please see the list of routes associated with each Costpoint Organization, located at: https://info.nrao.edu/oas/cap/organizations-and-applicable-requisition-approval-process-codes/. The Organization is assigned automatically in the requisition process once the Project and Account are selected, so the Requisitioner can then search for the routes associated with that Organization in order to narrow down the options.
3. **Submit for Approval**: This will be the final step after everything else below is completed. Select this check box to send this requisition for approval when you click on the toolbar. Be sure to finalize all your settings and preferences in this screen before you select this check box.
4. **Attach**: At the top of the Header, select the dropdown arrow next to Attach to attach documents related to the requisition. These documents should include the Needs Statement (required), plus any additional documents such as quotes, contact information, vendor lists, sole source justifications, notes to Buyers, etc. Each document to be attached should have its own unique file name. It should be named:

    <your initials>.<MM-DD-YY>.<description>.<file type>

    If you get an error message, DO NOT OVERRIDE the document. Instead, rename and attach with a new name.

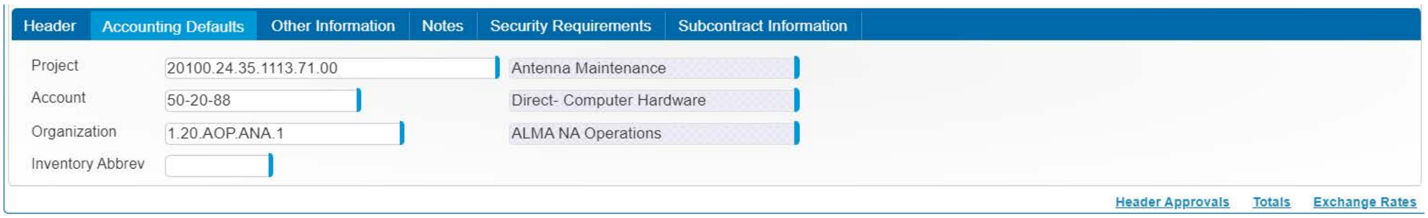
Header Tab



1. **Requisitioner**: This field should be automatically populated with your employee ID.
2. **Requisition Date**: This field's value defaults to the system date, but can be modified.

Accounting Defaults Tab

Click on Accounting Defaults tab to validate or enter default data. If the material is being purchased to INVENTORY, enter the Inventory Abbreviation. This will populate the Project, Account and Organization fields. If this is not an inventory purchase, enter or use to select the Project, Account and Organization. (Organization is assigned automatically in the requisition process once the Project and Account are selected.)

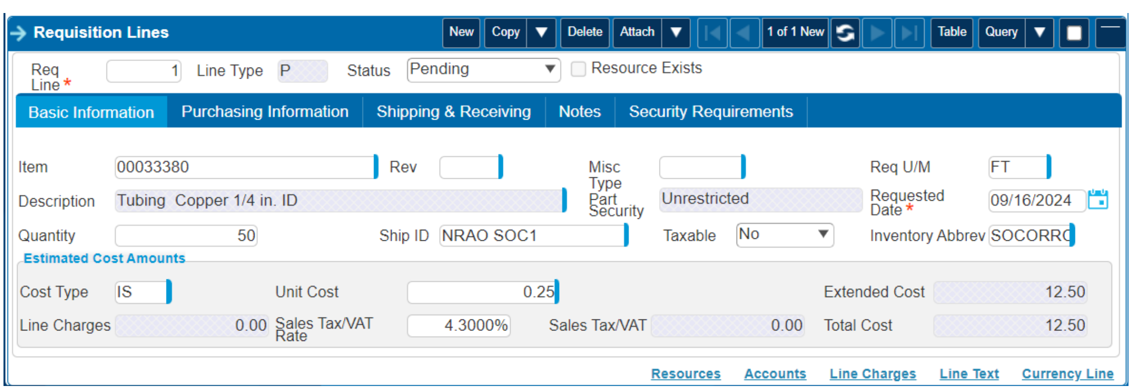


Other Information Tab

1. **Requested Date**: Enter or use to select the date by which the item is needed by the requisitioner.
2. **Ship ID**: Enter or use to select the ship ID where this requisitioned item is to be delivered.
3. **Deliver To**: Click to look up and select the email address of the end user.

Entering Requisition Lines

Note that any data entered in the header section of the requisition will populate the same fields when each line is entered, but can be modified.



Return to the main screen and click New to begin entering requisition line items. Switch to Form View to configure the screen as shown above.

Basic Information Tab

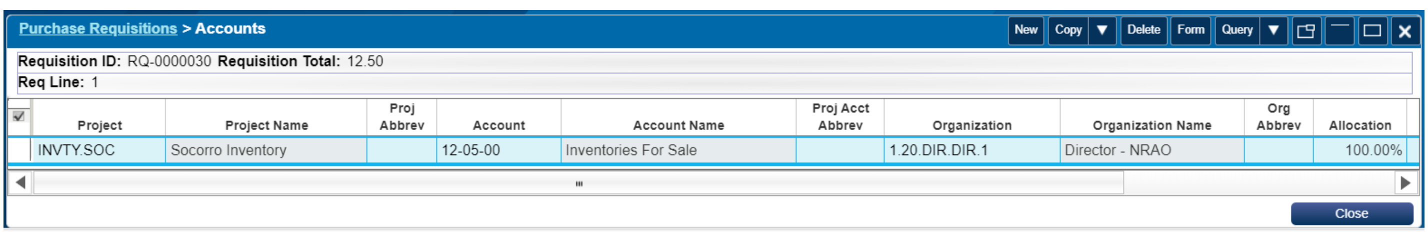
1. **Item**: Enter or use to select the ID of the item to be requisitioned. The item can be considered Parts, Goods, or Services.
    a. A requisition of **Parts** indicates the information exists in Inventory. The Item ID will be a number. Search for the part's Item ID number or within the Description.
    b. For requisition of a physical item not in Inventory, the Item ID should be named **Goods**, and the Description should be manually filled in. Selecting Goods automatically sets the value of the "QC Inspection Required" field (Shipping & Receiving tab) to "Yes." All other item types (Parts and Services) are automatically set to "No." However, the QC Inspection status can be changed if needed.
    c. For requisition of services, the Item ID should be named **Services**, and the Description should be manually filled in.

2. **Quantity**: Enter quantity requested. If a service is being requested, the quantity is the total amount in dollars, and the unit cost is $1.00.
3. **Unit Cost**: Enter the estimated unit cost for the requisitioned item.

Accounts Subtask

Use this subtask to distribute the requisition line charge to single or multiple project/account/organization combinations, or to change accounts on other requisition lines. This is a required subtask for all requisition lines.

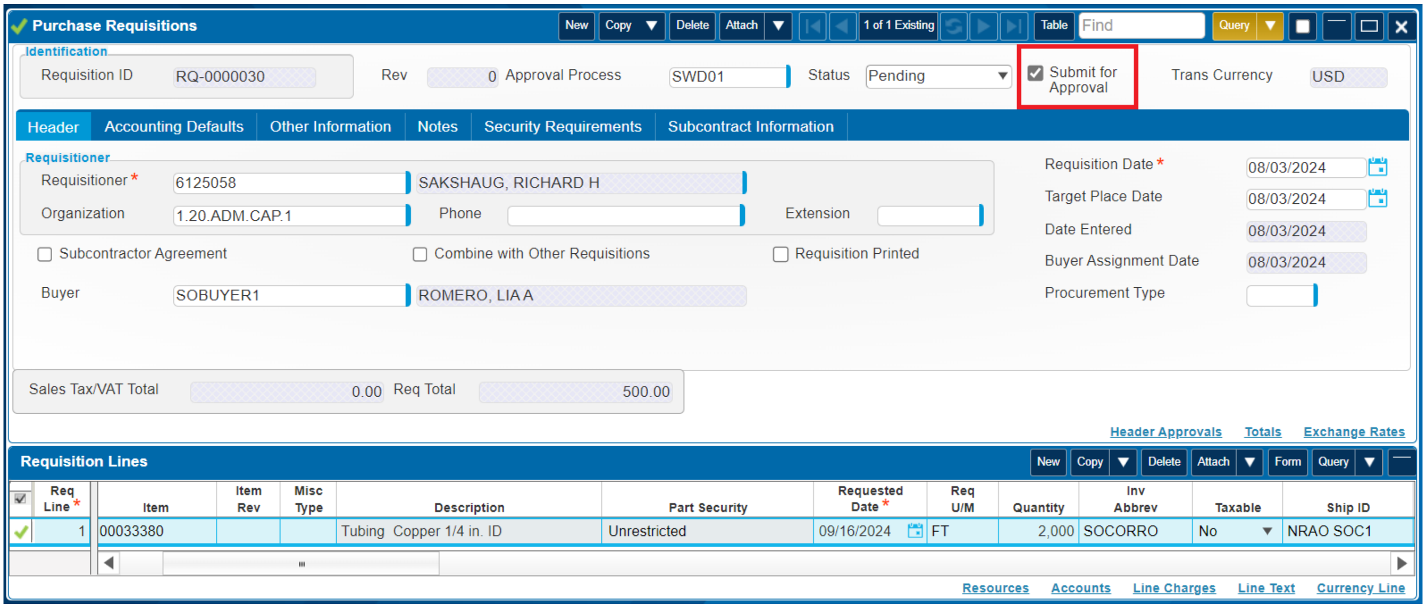
If you entered project, account, organization, and abbreviation information on the Accounting Defaults tab and elected to have the information default for all requisition lines, that information will load into this subtask. Otherwise, you can use New to create a new requisition line.



1. To add additional accounting at the line level, select the line and click on the Accounts link.
2. Click New on the tool bar.
3. Enter or use Lookup to select the P/A/O.
4. Enter the Allocation Percent or the Dollar Value. MUST add up to 100%.
5. Click Close when finished with all applicable lines.

Submitting a Requisition for Approval

1. Once the requisition is finalized, click the Submit for Approval checkbox to initiate the approval process.



2. Click Save 

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3. The status of the requisition will now be "In Approval" 

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