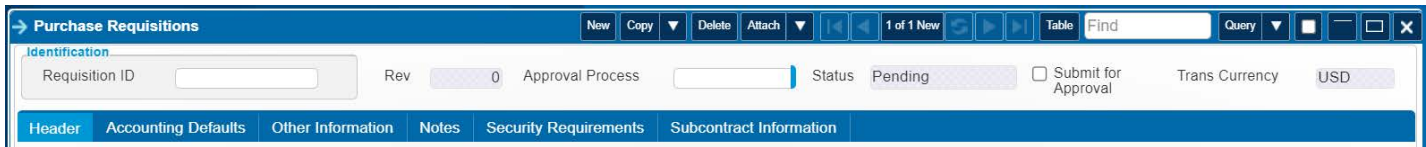




Entering Purchase Requisitions (streamlined directions)

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



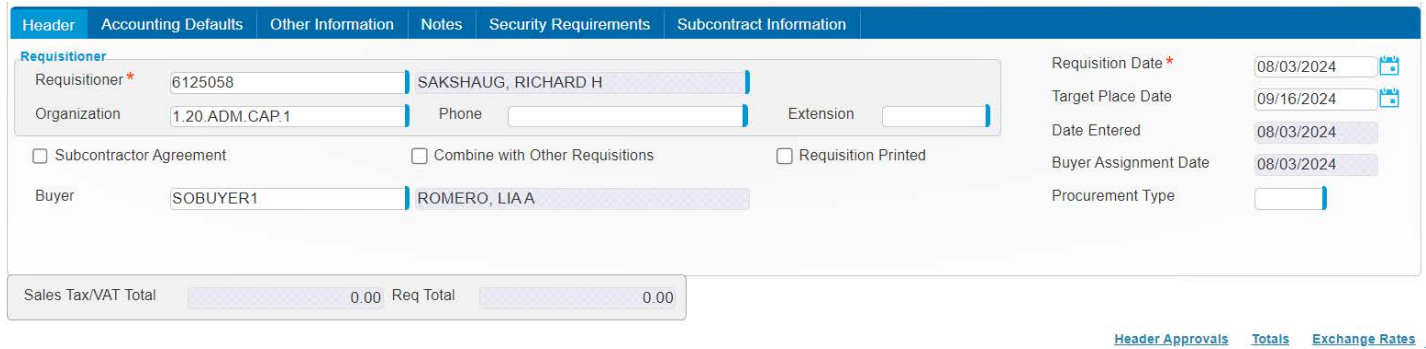
Identification


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. The full list of the Approval Processes is located at: <https://info.nrao.edu/oas/cap/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:** Enter or use  to select the employee ID of the requisitioner, who may or may not be the actual end user. If you are the Requisitioner, it 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.)



Header	Accounting Defaults	Other Information	Notes	Security Requirements	Subcontract Information
Project	20100.24.35.1113.71.00			Antenna Maintenance	
Account	50-20-88			Direct- Computer Hardware	
Organization	1.20.AOP.ANA.1			ALMA NA Operations	
Inventory Abbrev					

[Header Approvals](#) [Totals](#) [Exchange Rates](#)

Other Information Tab


Header	Accounting Defaults	Other Information	Notes	Security Requirements	Subcontract Information
Delivery Defaults					
Requested Date	09/16/2024 	<input type="checkbox"/> Drop Ship			
Ship ID	NRAO.SOC1				
Ship Via					
Deliver To					
PO Defaults					
Preferred Vendor	182216	Addr	CHK	Tax Status	Use Item Type Default
Sugg Blanket PO					
PO					
Discount	0.00%			<input type="checkbox"/> GSA	<input checked="" type="checkbox"/> Auto-default Header Text

[Header Approvals](#) [Totals](#) [Exchange Rates](#)


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:** Enter the name or department to which the requisitioned item must be delivered. This is optional, but will clarify who is the end user that will review and accept the delivery during the receiving phase.

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.
 - 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.



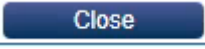
Accounts Subtask

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

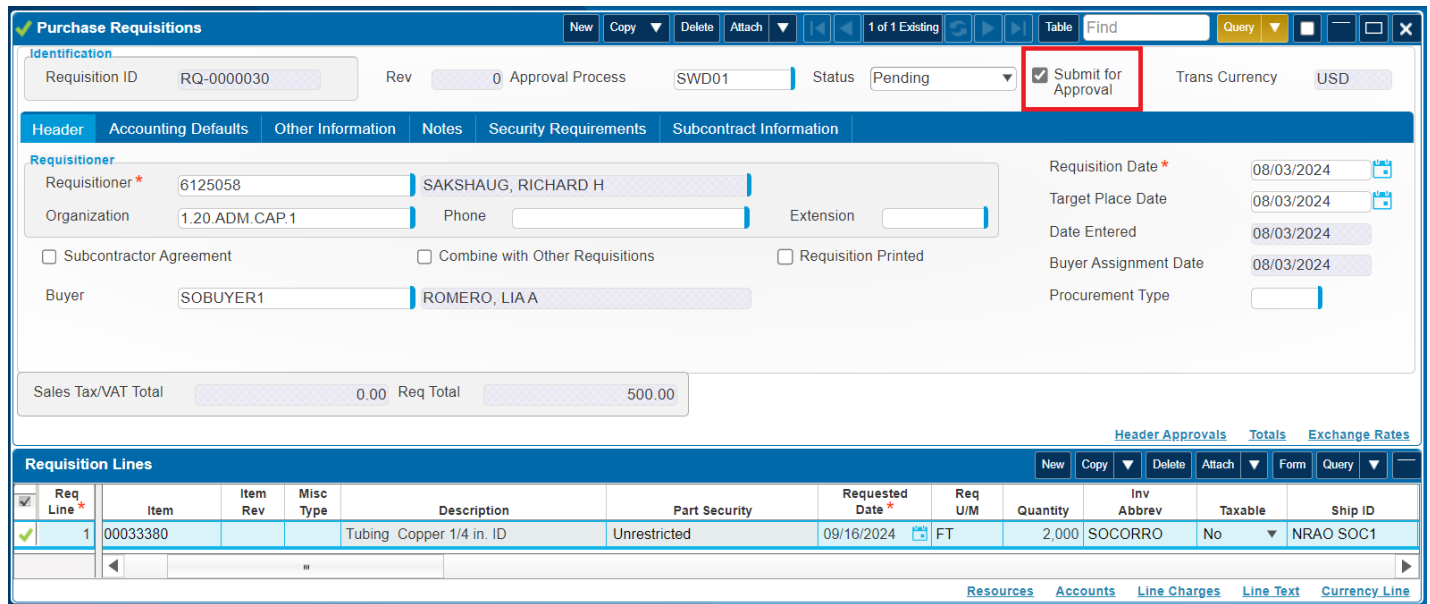
 to create a new requisition line.

Project	Project Name	Proj Abbrev	Account	Account Name	Proj Acct Abbrev	Organization	Organization Name	Org Abbrev	Allocation
INVTY.SOC	Socorro Inventory		12-05-00	Inventories For Sale		1.20.DIR.DIR.1	Director - NRAO		100.00%

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.



Purchase Requisitions | New | Copy | Delete | Attach | 1 of 1 Existing | Table | Find | Query

Identification: Requisition ID: RQ-0000030 | Rev: 0 | Approval Process: SWD01 | Status: Pending | Submit for Approval | Trans Currency: USD

Header | Accounting Defaults | Other Information | Notes | Security Requirements | Subcontract Information

Requisitioner: 6125058 | SAKSHAUG, RICHARD H | Requisition Date: 08/03/2024
 Organization: 1.20.ADM.CAP.1 | Phone: | Extension: | Target Place Date: 08/03/2024
 Subcontractor Agreement | Combine with Other Requisitions | Requisition Printed | Date Entered: 08/03/2024
 Buyer: SOBUYER1 | ROMERO, LIAA | Buyer Assignment Date: 08/03/2024
 Procurement Type: |

Sales Tax/VAT Total: 0.00 | Req Total: 500.00

Header Approvals | Totals | Exchange Rates

Requisition Lines | New | Copy | Delete | Attach | Form | Query

Req Line *	Item	Item Rev	Misc Type	Description	Part Security	Requested Date *	Req U/M	Quantity	Inv Abbrev	Taxable	Ship ID
1	00033380			Tubing Copper 1/4 in. ID	Unrestricted	09/16/2024	FT	2,000	SOCORRO	No	NRAO SOC1

Resources | Accounts | Line Charges | Line Text | Currency Line

2. Click Save  Save .

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