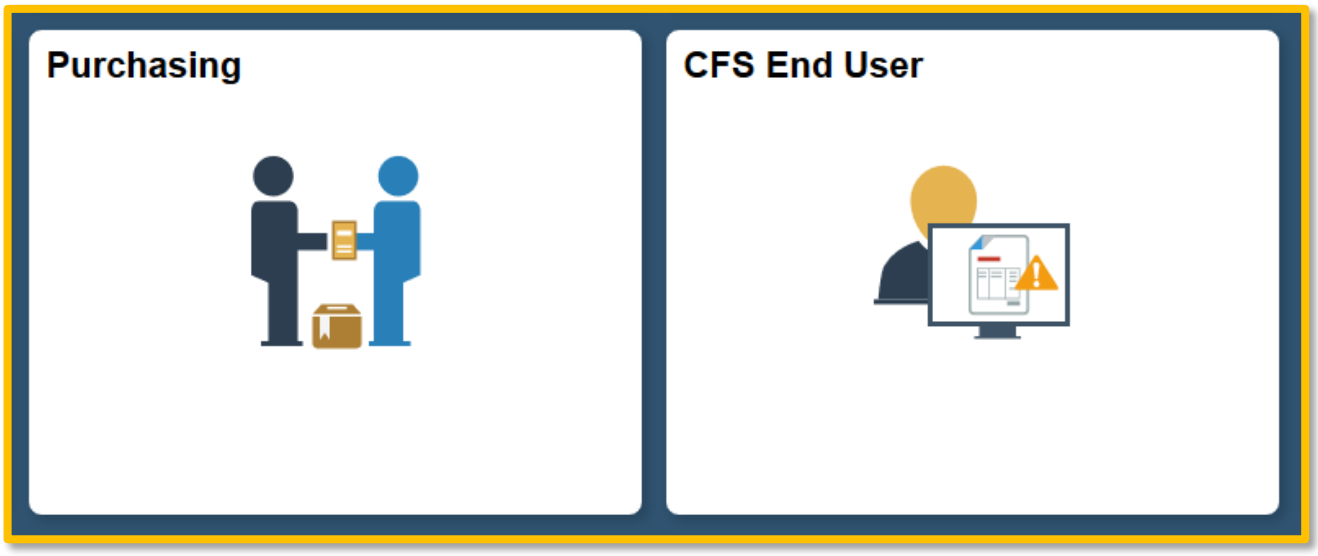
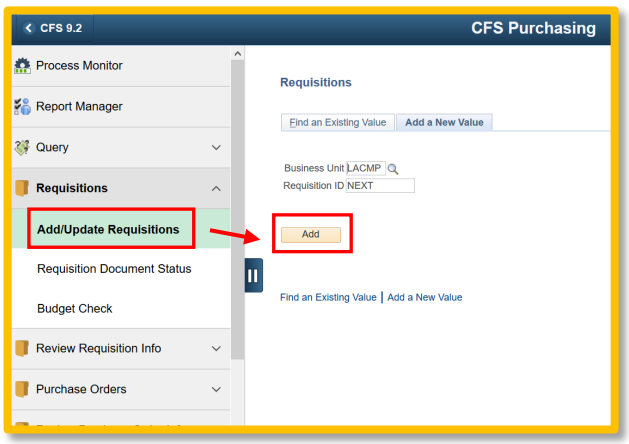
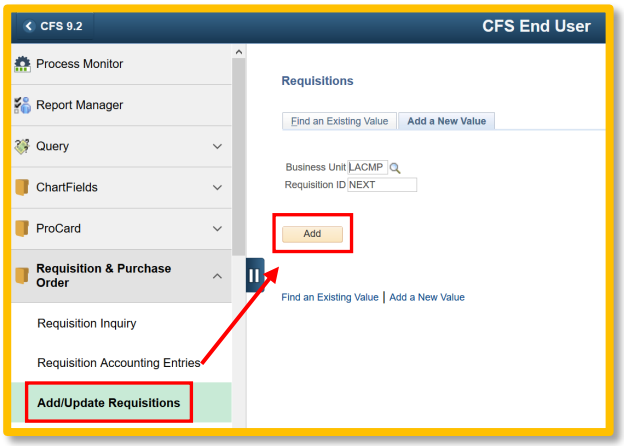
Enter a Requisition



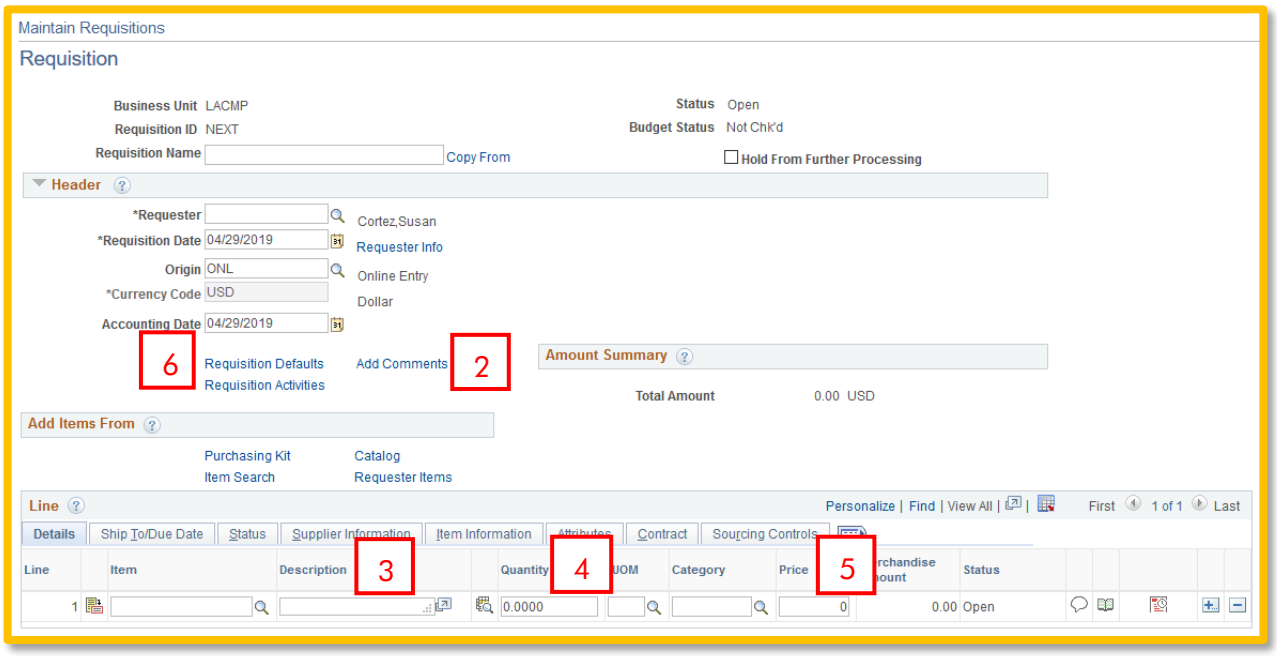
Click on either the Purchasing or CFS End User navigation tile and navigate to Add/Update Requisition.





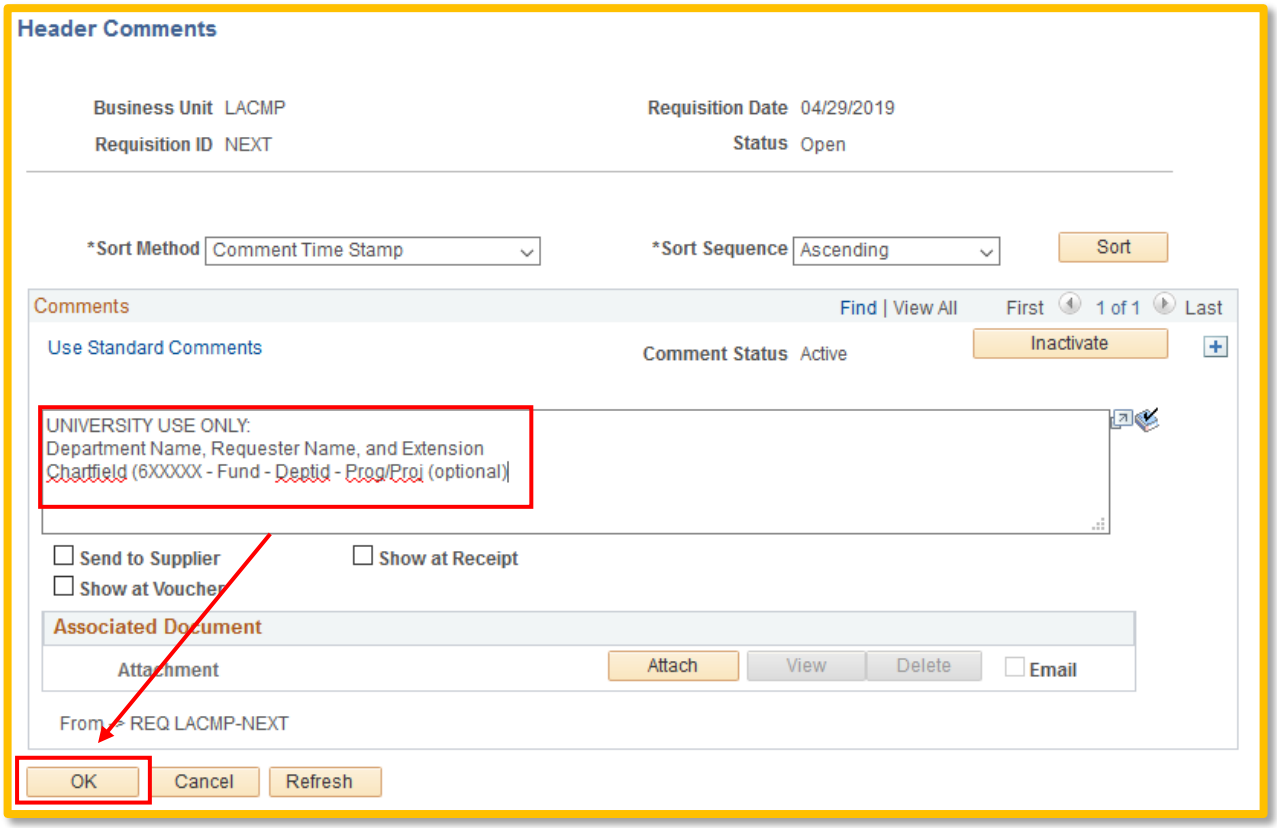
1. Click on 'Add'.

Maintain Requisitions page



2. Click on **Add Comments**

Add Comments page



Add Comments - Begin your comments with:

UNIVERSITY USE ONLY:

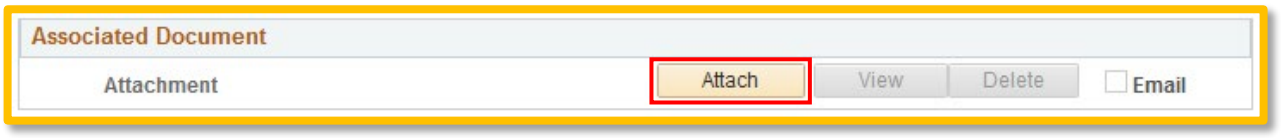
Department Name, Requestor Name and Ext.

Chartfield ex. 6XXXXX-SF001-5XXXXX

Other information you can add: Preferred Vendor ABC (include contact, address and phone) or special shipping instructions

Click on the OK button.

NOTE: When you have a quote or any other document you need to send to Purchasing, you can attach the file on this page. Click on the 'Attach' button to upload your document, then click on the OK button to return to the **Maintain Requisitions** page.



3. **Description**: enter the line item starting with the item name followed by the description. Include a catalog reference or part number, if applicable. Types of entry:

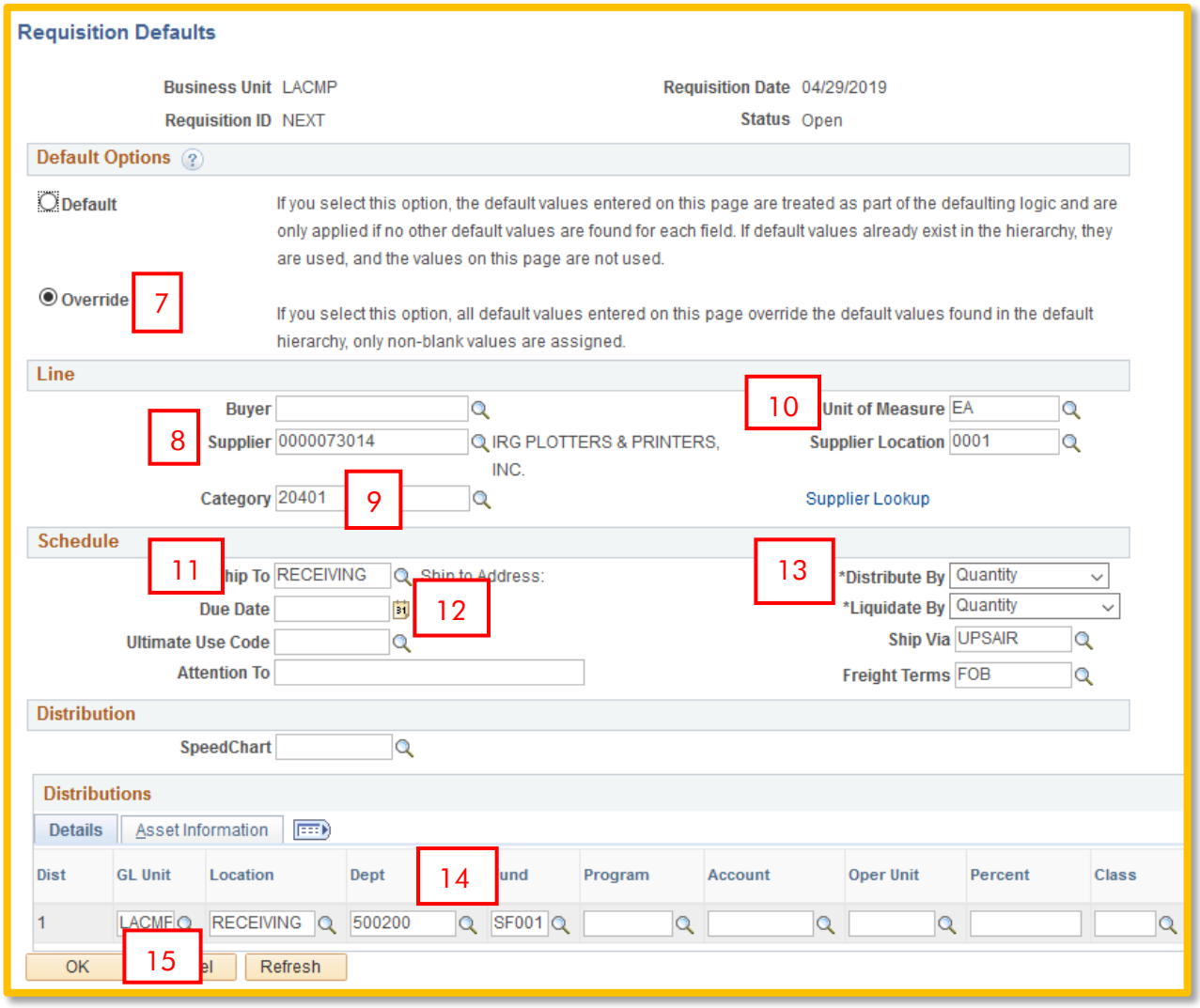
Commodity entry	Item, Description
Service/Open Orders entry	Service/Open Order - …
Additional Funds	PO# 2020XXXXX – additional funds
Freight & Handling	Enter a line for all freight and handling charges

If your order has multiple items, click on + on the right-hand side of the line to add row(s). Do not enter more than 25 lines per requisition.

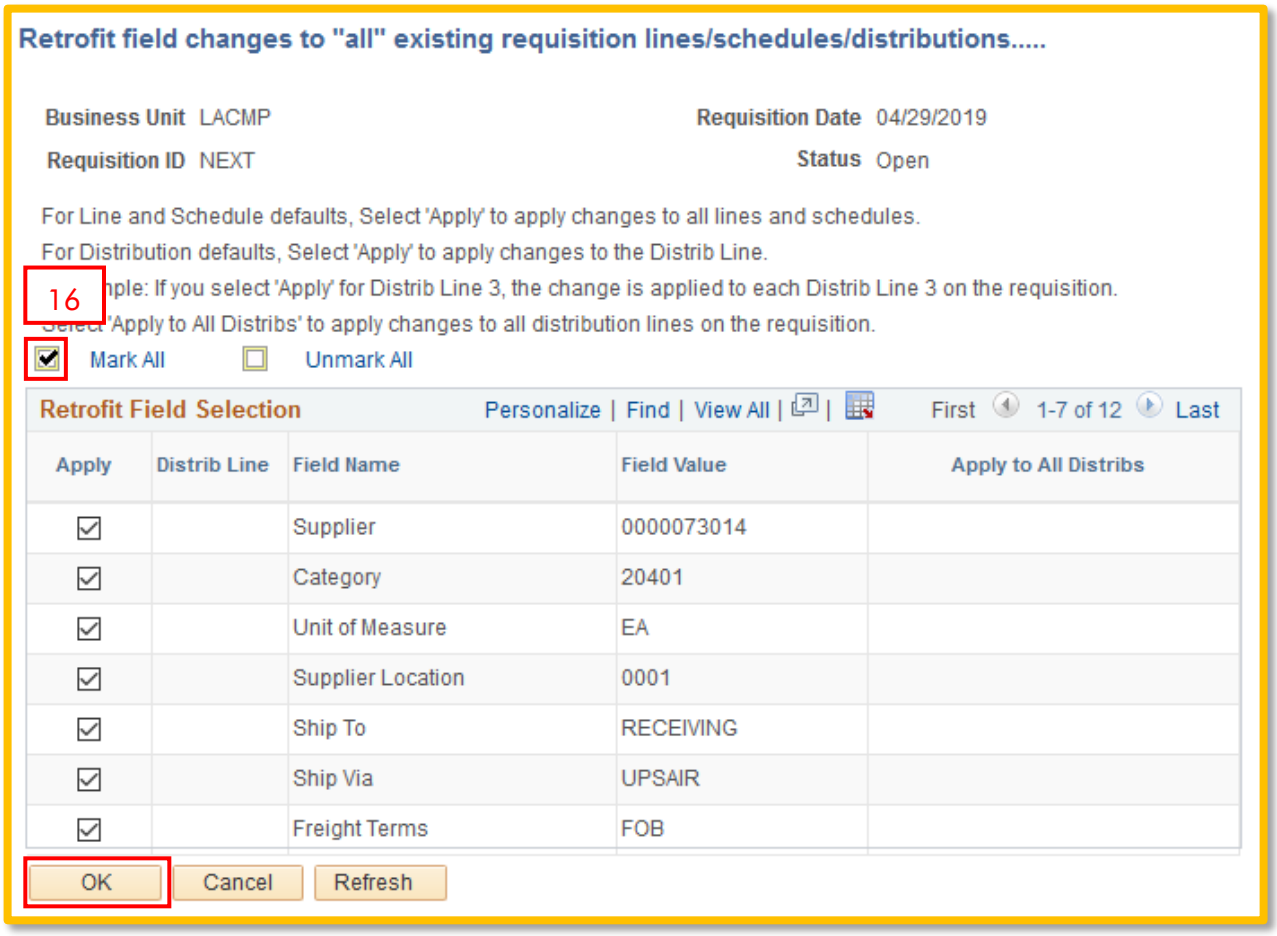
4. **Quantity**: enter quantity. Service or open orders enter a quantity of '1'.

5. **Price**: enter the price per item

6. **Requisition Defaults** (located to the left of the Add Comments link)



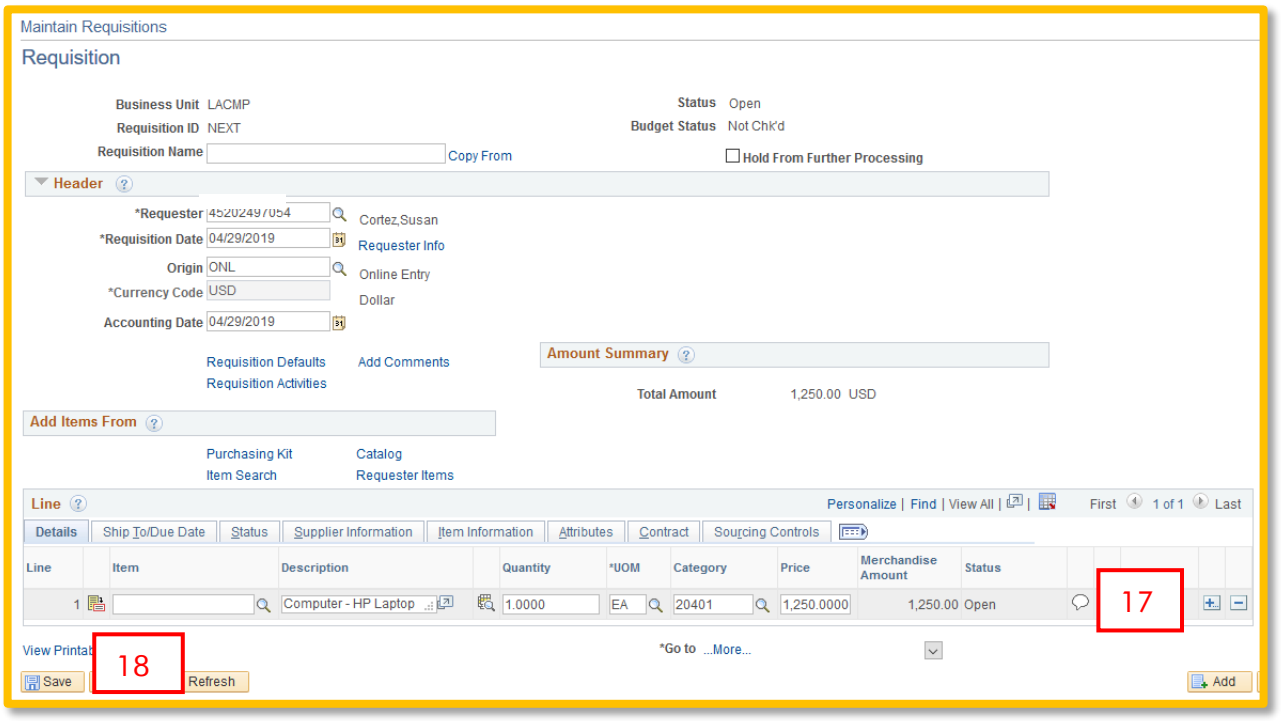
7. **Override**: click on the radio button
8. **Supplier**: enter if you have a preferred vendor. Click on 🔍 to look up the supplier id.
9. **Category**: Click on 🔍 to view a list of choices. (Catering 96115, Freight FRT)
10. **Unit of Measure**: EA = commodity items LOT = Service or open orders
11. **Ship To**: Items = RECEIVING Open and Service = NOTAX
12. **Due Date**: if a rush order enter the due date
13. ***Distribute by/*Liquidate by**: Items = Quantity Blanket and Service = Amount
14. **Financial Chartfield**: enter your Deptid/Fund/Program (opt) – leave Account blank, it will auto-populate based on the Category code chosen.
15. Click on the OK button, the following page will display:



16. Click on **Mark All** to check all the boxes and OK to return to the main page.

NOTE: You can return to Requisition Defaults at any time if you add additional lines later or need to change one of these values.

Maintain Requisitions page



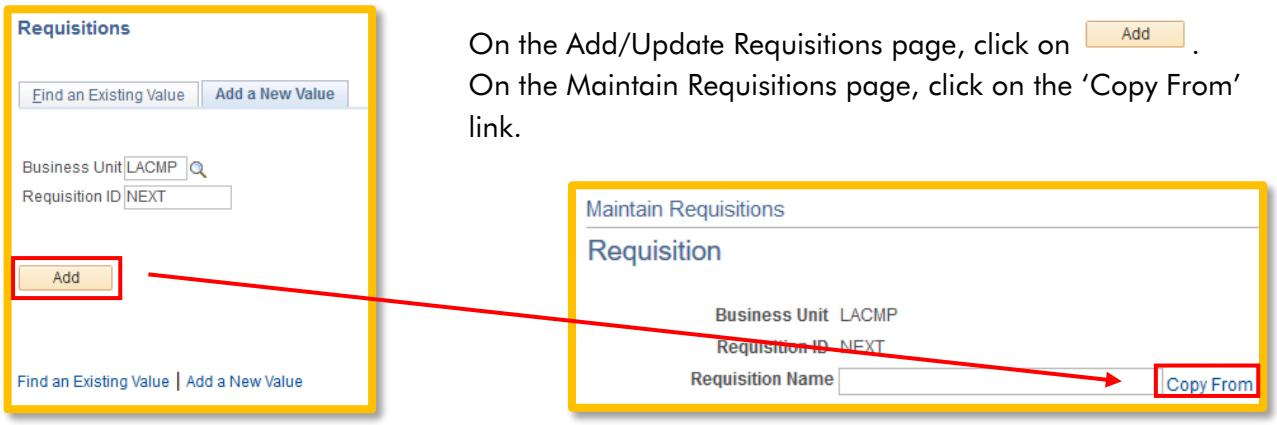
NOTE: If you have items that are a different category, UOM or chartfield; change the row after you finish your requisition defaults.

17. **Line Comments**: additional information relevant to that line that is not noted in the Description field such as size/color. If you have $0 items, enter the information here. For quotes, enter your quote number here on the last row of your order.

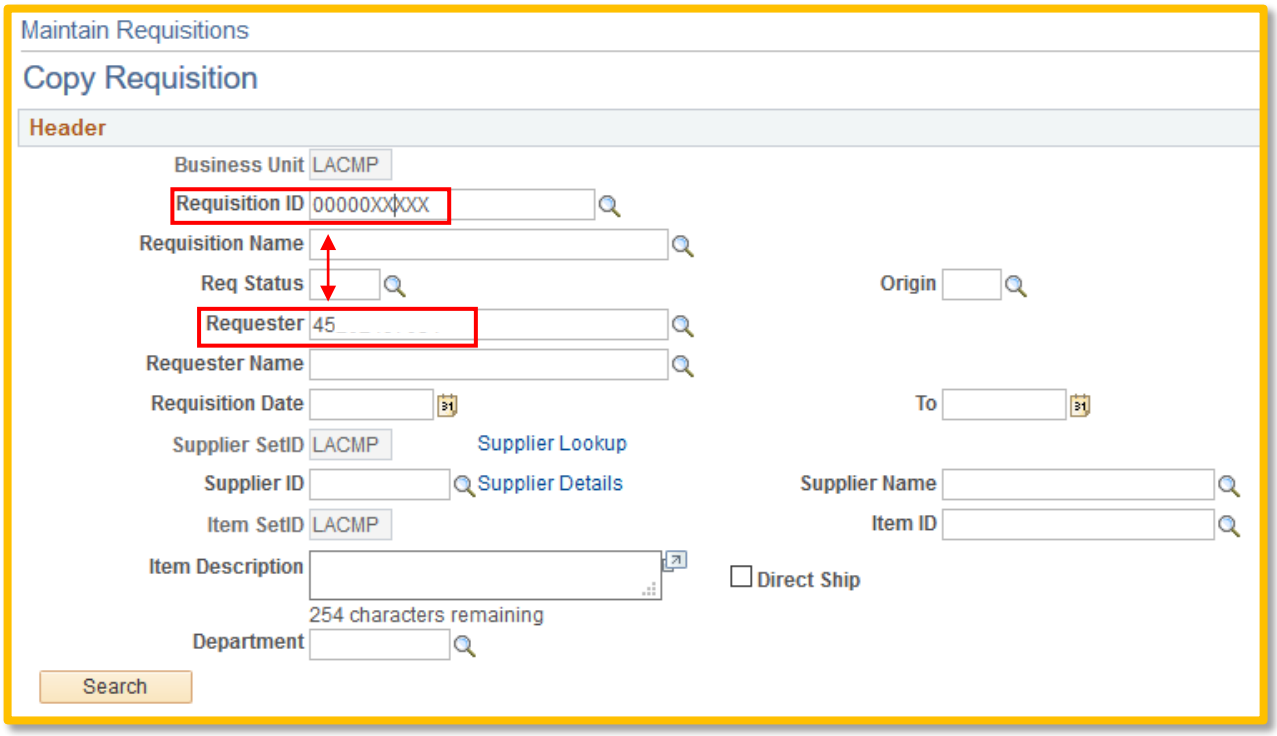
18. Click on the Save button at the bottom of the page. If any required fields are missing, you will receive a warning, update the field and save again. Once the save is complete, the Requisition ID field will change from 'NEXT' to the assigned requisition number, make note of this number. Contact your approver to approve the requisition.

Copy a Requisition

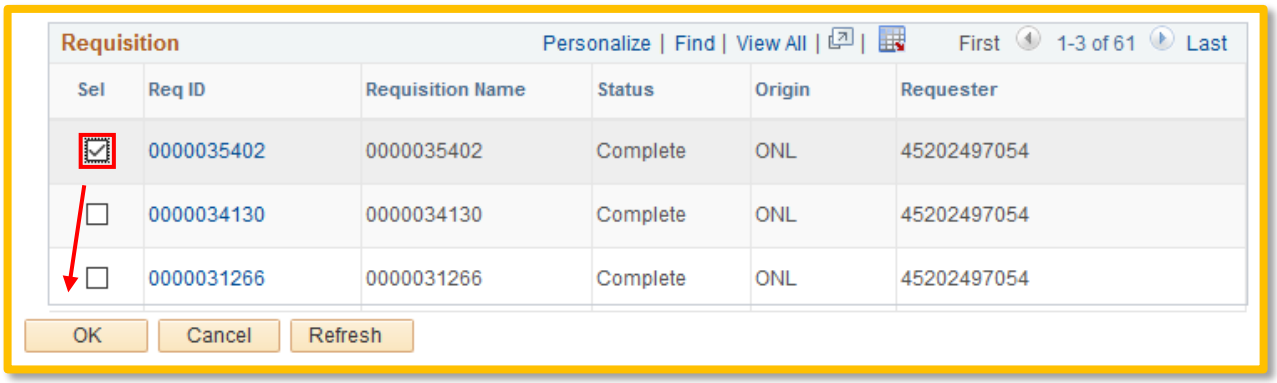
To save time, you can copy a previously entered requisition, make the necessary updates for that order and save. Once saved, a new requisition number will generate.



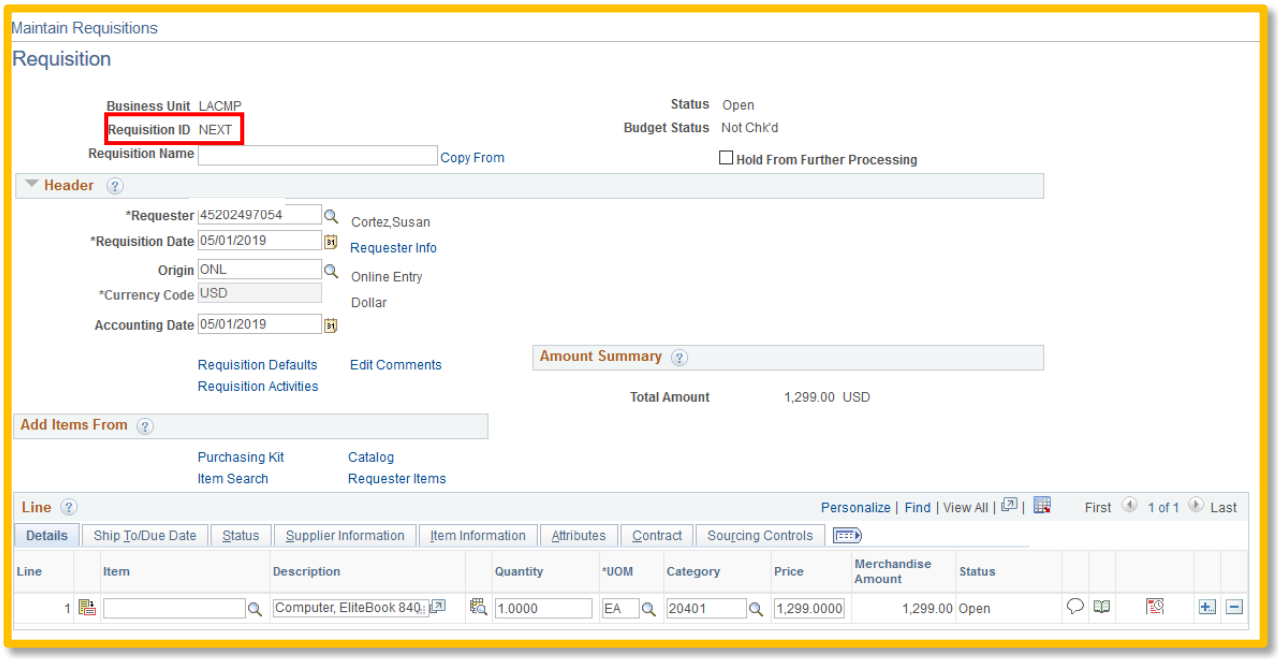
On the Add/Update Requisitions page, click on Add.
On the Maintain Requisitions page, click on the 'Copy From' link.



Search by entering the requisition ID you want to copy **OR** by searching your requisitions by entered 45 + your emplid into the Requester field. Click on Search, matching requisition(s) will display below.



Using the search by Requester, 61 requisitions are found. You can click on the Req ID link for each one to see review that requisition. When you search by Requisition ID, only that requisition will appear. Once you find the requisition you want to copy, click on the 'Sel' checkbox and click on OK.



Requisition ID must show 'NEXT', you can make updates to the requisition for your new purchase. Once you are done, click on Save and a new Requisition number will update in the Requisition ID field, make note of this number. Contact your approver to approve the requisition.