Creating a Purchase Requisition

1) Click on the Main Menu button

2) Click on eProcurement

3) Click on Create Requisition
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You will be directed to this screen:

4) Put your uniqname in the *Requester box (should default this way)
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5) **Requisition Name**: Enter the vendor’s name that the purchase order is to be sent to (Optional)

6) **Bullet the Override button in the Default Options sections**
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7)  **Vendor:** enter the ten-digit vendor number

8)  **Press Tab** to have the **Vendor Location** box to fill

9)  **Address Sequence:** click on the magnifying glass and select the correct value (this is not always necessary)
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10) **Category:** Enter the appropriate 5 sequenced letters. If you do not know the category code, click on the magnifying glass, change the “begins with” constraint in the description row to “contains, and type a one word description to find the appropriate value.

11) **Dispatched Method Unit of Measure:** Enter the appropriate unit of measurement. The value is normally each (EA) or lot (LOT), but if not, then click on the magnifying glass and find the more appropriate unit of measurement.

12) **Contract ID:** Leave blank unless Procurement has bid products/services for your department and a contract number has been provided.
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13) Ship To: “1001633”
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14) **Attention:** “UMFlint,” and then type the department, potential sub-department, and room number if applicable.

15) **SpeedChart:** enter the prescribed shortcode, and then push tab (the information below will default based on the shortcode sequence).
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16) Click **Continue**

17) Click **Special Item**
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You will be directed to now make the purchase order lines:

18) **Item Description**: Provide the invoice number and a brief description for what the invoice is for. If you have a quote, then enter the product description.
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19) **Price:** insert the price amount

20) **Quantity:** insert the quantity amount
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21) **Category:** if you do not enter the category earlier, or if the line items require different categories, then insert the code for the type of service or good provided.

All of the other information necessary for the **Special Item** section will carry over from the last default screen into this screen.

22) A) If this is not the last line of the purchase order, then click **Add Item**, and repeat steps 48-51 again.

   B) If this is the last line of the requisition, then type, “**UM-FLINT CONTACT: [CONTACT NAME] [CONTACT’S PHONE NUMBER]**.” If you have a quote, then enter the vendor quote number and sales representative’s name and contact information (e.g. email and phone number) in the **Additional Information** section.

   If this is a quote, then include

23) **Check the Send to Vendor box**
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24) Click Add Item

25) When you are finished entering in line items, then click **Cancel** or **Review and Submit**
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The lines entered will appear in the dialog box in the top, right-hand corner of the window with the description, quantity, the unit of measurement, the number of lines, and the total amount.

26) Click Review and Submit
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The window will show you a review of the requisition.

27) **Dispatch Method**: “Phone” for all purchase orders with invoices, or if you will be calling the order. If the requisition is not an invoice, leave the dispatch clear. The vendor will receive the order by their most preferred method.

28) Click **Save & submit**
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29) When the dialog box appears, click **OK**

![Message dialog box](image)

*Message*

Please make sure you have attached any relevant documents. (20001.6)

Please make sure you have attached any relevant documents if available, and made note of them in Justification/Comments, before submitting your requisition. If you already have, then please click **OK** to submit.

![Confirmation](image)

30) Write the **Requisition #**

![Confirmation](image)

31) Click **Check Budget**

![Confirmation](image)
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The system will run the requisition to confirm the funds can be spent. This process takes a couples of minutes. If the system confirms the requisition cost, it will show that the spending is valid.

The purchase order is now waiting to be batched. The batching process begins at the beginning of the next hour, and will take approximately twenty minutes.