## Creating a Requisition

1. From the Financials menu, click the **Purchasing** link.

2. Click the **Requisitions** link.

3. Click the **Add/Update Requisitions** link.

4. On the **Requisitions** page, make certain the **Add a New Value** tab is selected. Click the **Add** button.

5. Click the **Requisition Defaults** link to specify the defaults applicable to the requisition.

6. On the **Requisition Defaults** page, the first step is to look up and select the appropriate **Purchase Order (PO) Type**. Click the **PO Type** drop-down arrow and select the appropriate PO Type.

7. On the remainder of the **Requisition Defaults** page, enter defaults that you wish to apply to the entire requisition. You can override defaults at the **line**, **schedule**, and **distribution** levels.

   In the **Line** section of the page, enter your EmplID into the **Buyer** field.

8. Enter the Vendor ID in the **Vendor** field.

9. Enter **MISC** in the **Category** field.

10. Use the **Unit of Measure** field to enter a default unit of measure for the Requisition.

11. Enter the location code for your campus in the **Vendor Location** field.

12. In the **Schedule** section of the page, use the **Ship To** field to enter/change the University location to which the vendor will ship the order. Normally, your usual location will default for you.

   Use the **Distribute by** drop-down list to select how you want to distribute the cost. Your choices are either **Amount** or **Quantity**.

13. Click the **Distribute by** drop-down arrow.

14. Click on **Quantity** to select it.

15. Select the **More PO Defaults** link to enter defaults for the Requisition Header.

16. The **Requisition Header Defaults** page contains the **Billing Location**, **Payment Terms**, **Dispatch Method**, **Freight Terms Code**, **Ship Via Code**, and the **Dispatch and Amount Only** checkboxes. These fields will default for you but may be changed as needed. (The **Receiving Required** checkbox cannot be changed.) Use the Look Up Icons or Drop Down Menus to search and select from the available choices.

17. When finished, click the **OK** button.

18. On the **Requisition Defaults** page, click the **One Time Address** link.
19. Use the **Req One Time Address Default** page to enter a Ship-To address that is not a University address for special shipments. 

   Click the **OK** button when finished entering the address.

20. If you use SpeedCharts, use the **SpeedChart** field to enter a default SpeedChart.

21. In the **Distributions** section of the page, in the distribution line, use the **Percentage** field to specify the percentage of the order quantity that is to be distributed on the distribution line(s).

22. The remaining fields are **Chartfields**. Enter the appropriate Chartfield combination for this requisition. At a minimum, **Account**, **Fund** and **Dept** are required. **Program**, **Project**, **Class** and **Oper Unit** may also be used.

23. When finished entering your requisition defaults, click the **OK** button.

24. Once you set your requisition defaults, changes are rarely made to them. If you must apply changes to your default settings to alter a ChartField value on a distribution line, or a Vendor, for instance, then you will be presented with the **Retrofit** page after saving the changes.

   When ready, click the **OK** button.

25. On the **Requisitions** page, enter a description of the item/s you are ordering in the **Description** field. In the following steps, 26-29, if you entered these on the Requisition Defaults page you do not need to enter them here.

26. In the **Quantity** field, enter the quantity of the item/s you are ordering.

27. Enter the appropriate Unit of Measure in the **UOM** field.

28. Enter the default category into the **Category** field.

29. In the **Price** field, enter the price for the item/s.

30. If desired, click the **Line Comments** icon to access the **Line Comments** page.

31. Use the **Line Comments** page to maintain line comments. 

   Click the **OK** button when finished.

32. Click the **Line Details** icon to open the **Details for Line 1** page.

33. Use the **Details for Line** page to view and/or update details about the Line. This page has the **Do Not Print Line** check box and the **Amount Only** check box (the **Amount Only** box is also on the **Attributes** tab).

   Click the **OK** button.

34. On the **Requisitions** page, click the **Line Schedule** icon to change the **Ship To** address and to access the **Distribution** page. If you entered the Ship to and Distribution on the Requisition Defaults page you do not need to enter it here.

35. On the **Schedule** page, click the + button to add more **Ship To** lines. Click the Look Up icon adjacent to the **Ship To** field to search for and select the Ship To location(s) needed.
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<td>36.</td>
<td>Click the <strong>OK</strong> button.</td>
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<tr>
<td>37.</td>
<td>Click the <strong>Distribution</strong> button.</td>
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| 38. | If you did not enter the Distribution on the **Requisitions Defaults** page you can do it here. If you entered the Distribution on the **Requisitions Defaults** page, you can still make changes here.  
   | Click **OK** to go back to the schedule page. |
| 39. | Click the **Return to Main Page** link. |
| 40. | On the **Requisition** page, click the **Add a Row** icon (+) |
| 41. | When the prompt appears, enter the number of lines you wish to add to the Requisition. "1" appears by default.  
   | Click the **OK** button. |
| 42. | Click the **Save** button. |
| 43. | After saving the requisition, notice that a **Requisition ID** has been generated. |
| 44. | **End of Procedure.** |