Create a Purchasing Requisition

This instructional guide describes how to create a purchasing requisition in PeopleSoft for a good—thus beginning the “procure to pay” life cycle. To learn more, attend Purchasing and Payables in myUFL I: An Introduction. To learn how to create a purchasing requisition for a service, please see the web tutorial and instructional guide titled “Service Requisitions.” If you are creating a requisition for an asset, see the Purchasing Requisition for Assets - Additional Guidelines instruction guide.

- Log on to myUFL using your GatorLink username and password (http://my.ufl.edu)
- Navigate to eProcurement > Create Requisition
- At the New Requisition screen, change the Business Unit (UFLOR) to the first four digits of the appropriate Department ID
  - Click “OK”
- OPTIONAL: At the Requisition Summary screen, enter the Requisition Title of your choice
  - The more descriptive, the better (you will be able to conduct searches based on this title). If you don’t choose to title the requisition, myUFL will use the system-assigned requisition number as the title
    - Click “Special Request”
- At the Special Request screen, choose “Good” and click “Next”
- At the Special Request—Goods screen, enter a Description
  - Be specific: include make and model number (250 characters are provided here). For example: Swivel chair, model 54123, gray fabric P28
  - Need more room? See Comment Bubble icon instructions below
- Enter or select Category (number)
  - To select Category, click the magnifying glass view icon
    - At the Look Up Category screen, search by Category (number) or Description
      - Enter search requirements and click “Look Up”
    - Click the appropriate Category from the Search Results listed
- Enter the following values:
  - Qty = Number of items
  - Unit of Measure = e.g., “ea” (each) or “lbs” (pounds). Not sure? Use magnifying glass view icon
  - Price = e.g., $250.00 per chair
  - Due Date = Date by which you need the good. Click the Calendar icon or type directly
- Click “Vendor ID”
  - At the Vendor Search screen, enter the first few letters of the Vendor Name. If you cannot find the vendor, see Line Details icon instructions below
   - The default country is “USA.” If the vendor is located outside of the United States, change this field accordingly by clicking on the magnifying glass view icon to the right of the field
     - Click “Find”
- Select the vendor from the list displayed by clicking the corresponding Check icon to the right of the vendor
  - The associated Vendor ID will now be displayed on the Special Request—Goods screen
- Click “Add Item”
The first line of the requisition will be displayed on the Requisition Summary Screen
- Do NOT check the PCard box. PCard is used for unencumbered purchases only

- Click the Truck icon to review shipping information and change as needed
  - "Ship to" location defaults from sign-on
    - Can change by clicking magnifying glass view icon and using look up feature
      - Advanced Lookup allows searching and selecting by building name or number
      - Can't find what you need? Review the “Shipping Information” instructional guide

- Click the Ledger icon within Shipping Information to go to ChartFields
  - Enter/verify all ChartFields (be sure to scroll to the right to view the entire string)
    - To learn more about ChartFields, view ChartFields: Pre-class Tutorial available at www.bridges.ufl.edu > Training > Classes and Web Tutorials

- To split the cost between two or more ChartField strings, click the “Plus” button to the far right
  - A new ChartFields line will be added
  - Repeat as needed

See the “Cost Sharing” Instructional Guide for details about how to meet cost-sharing requirements associated with a contract or grant

- Click “Return to Requisition Summary”

- Click the Line Details icon
  - If you were able to find the vendor initially, use the “Finding Vendors” instruction guide to find the vendor number
  - Once you have the vendor number, input the number in to the Vendor field

- Click the Comment Bubble icon
  - IMPORTANT: If the comments added need to appear on the purchase order, you MUST check “Send Comment to Vendor”
    - You may attach quote or other appropriate documents by using the “Add Attachment” button

- Click “OK”

- Click “Justification/Summary”
  - At the Justification/Summary screen, enter information for Purchasing and Disbursement Services and/or your next level approver in the Justification box
    - Click "Return to Previous Page"

- Click “Save and Submit” to start the approval process
  - If a second line is needed for the requisition, click “Special Request”
    - See the instruction guide “Tips for Creating Multi-Line Requisitions”
  - Look for a “Requisition has been saved” message along with a Requisition ID number and “dancing” exclamation point
  - “Save for Later” can be used if you aren’t ready to start the approval process
    - Valid ChartField strings are required to save the requisition
  - “Cancel Requisition” can be used to cancel the requisition you just created

The requisition is now a request in the “procure to pay” lifecycle in PeopleSoft

HINT: When communicating with Purchasing, always include your Purchasing Business Unit and Requisition Number