STEPS TO ENTERING A PURCHASE REQUISITION

To correctly enter a Purchase Requisition the user must follow these steps:

1. To enter a Purchase Requisition select *GO* from the Menu Bar. A menu window will appear, select *Administer Procurement*. Another window will appear, select *Requisition Items*. This will give the user access to the Requisition Module.

2. To start entering the Requisition, select *Use* from the toolbar. A menu window will appear, select *Requisition.* Another window will appear select, *Requisition Form*. Another window will appear. Select *Add* to enter a new transaction. Select *Update/Display* for an existing one.

3. After selecting *Add* a dialog box will appear. **Do not change** the information; click *OK* to continue entering the transaction. You may begin entering your transaction.

4. The first panel your need to complete is *Requisition Form:* In this panel the user enters due date, origin date, requisition date, items and selects requester, origin and department id. Origin and department Id are required fields to establish workflow.

5. The next step will be selecting a vendor. To complete this step, go into the *Defaults / Details* panel and start the process selection. Select location and ship to address.

6. In the *Defaults / Details* panel select SpeedCharts to be used in the transactions.

7. Enter requisition items. You must enter category, long description, quantity, and units of measurements, price, and line comments. If you want the line comments to reach the vendor select the Send to Vendor checkbox.

8. Select the *Header Comments* panel. Enter requisition Comments.

9. Proceed to *Edit* the transaction.

10. *Refresh* after edit process is completed.

11. Your final step will be to *Budget Check* the transaction.

12. To exit a requisition after completing the transaction, click on the red X on your toolbar.