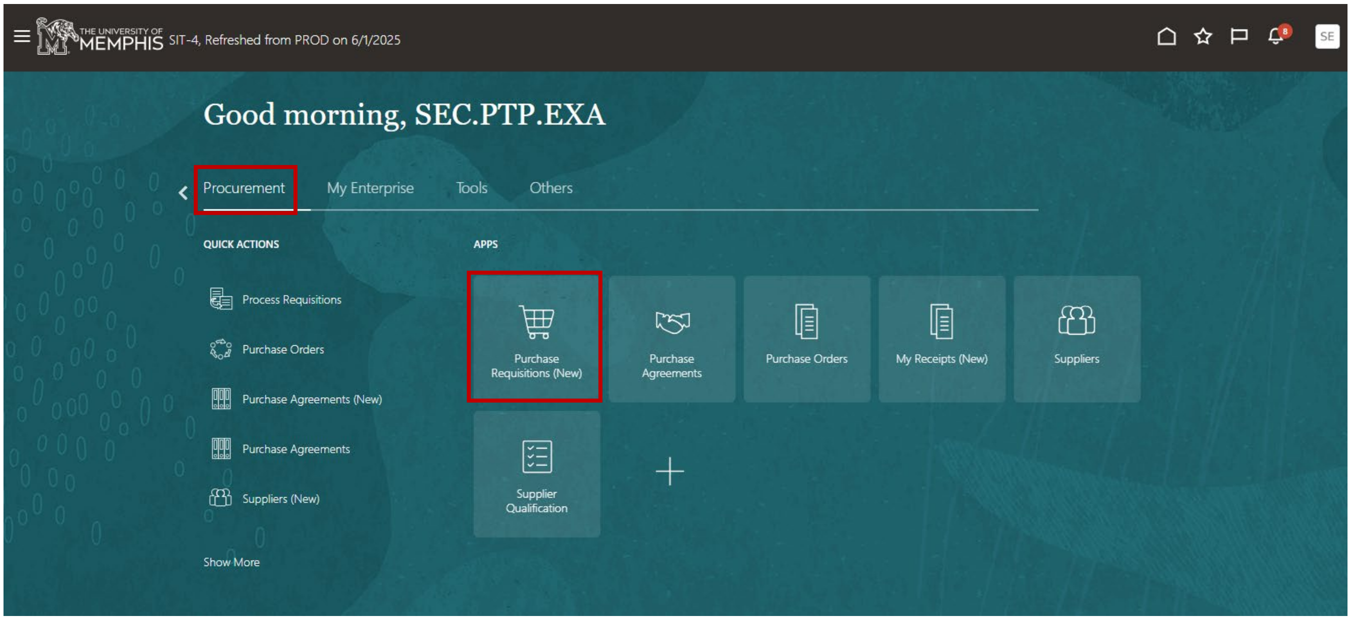
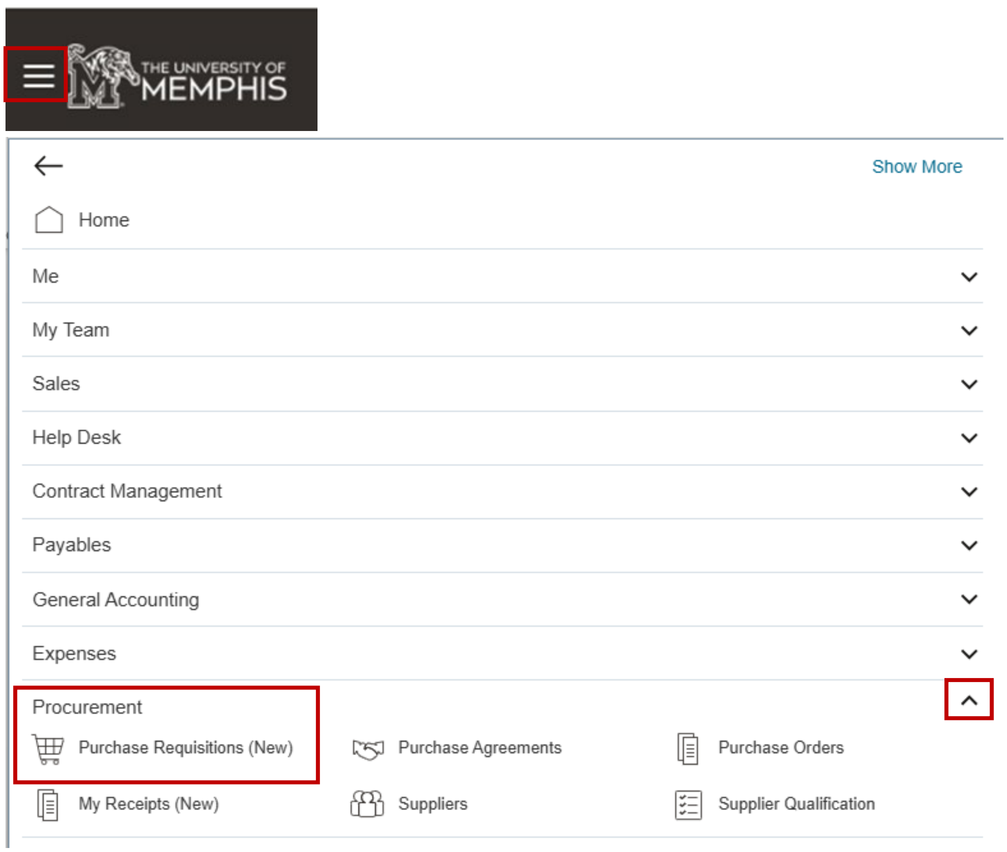
How to - Create a Non-Catalog Goods Requisition

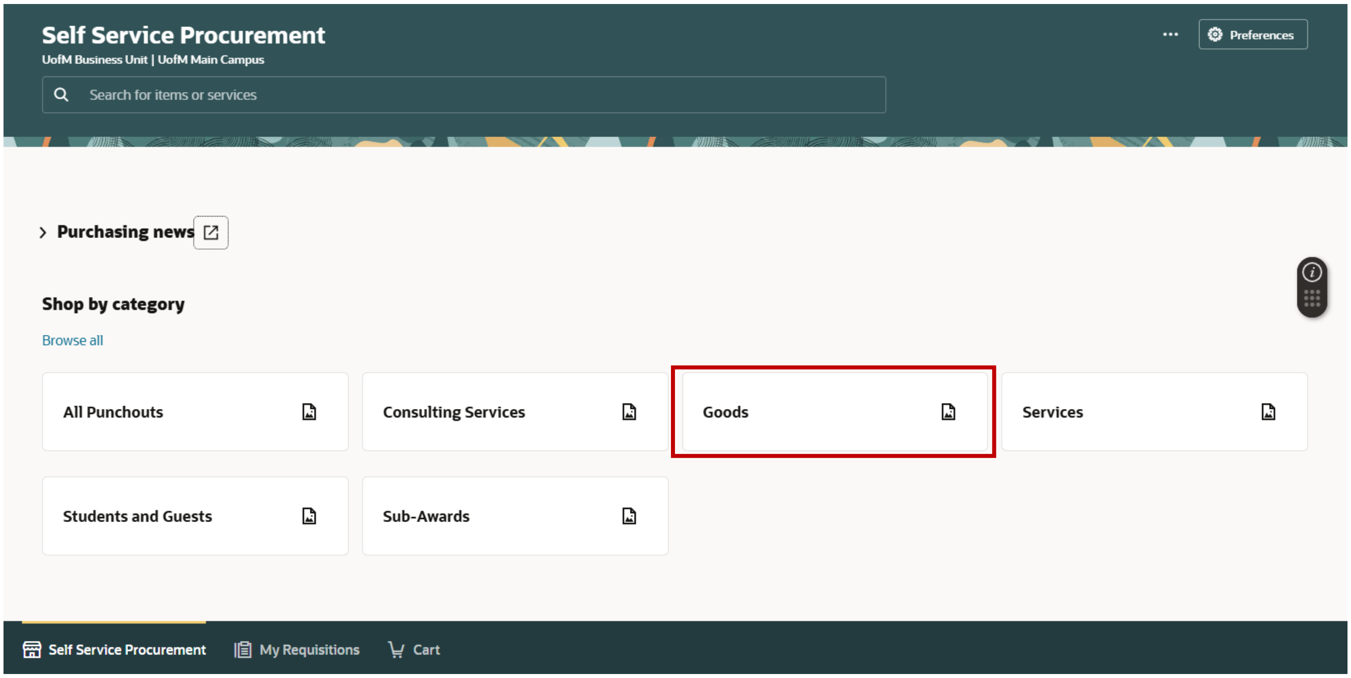
Using the navigator bar, go to **Procurement** and click on the **Purchase Requisitions (New)** tile.



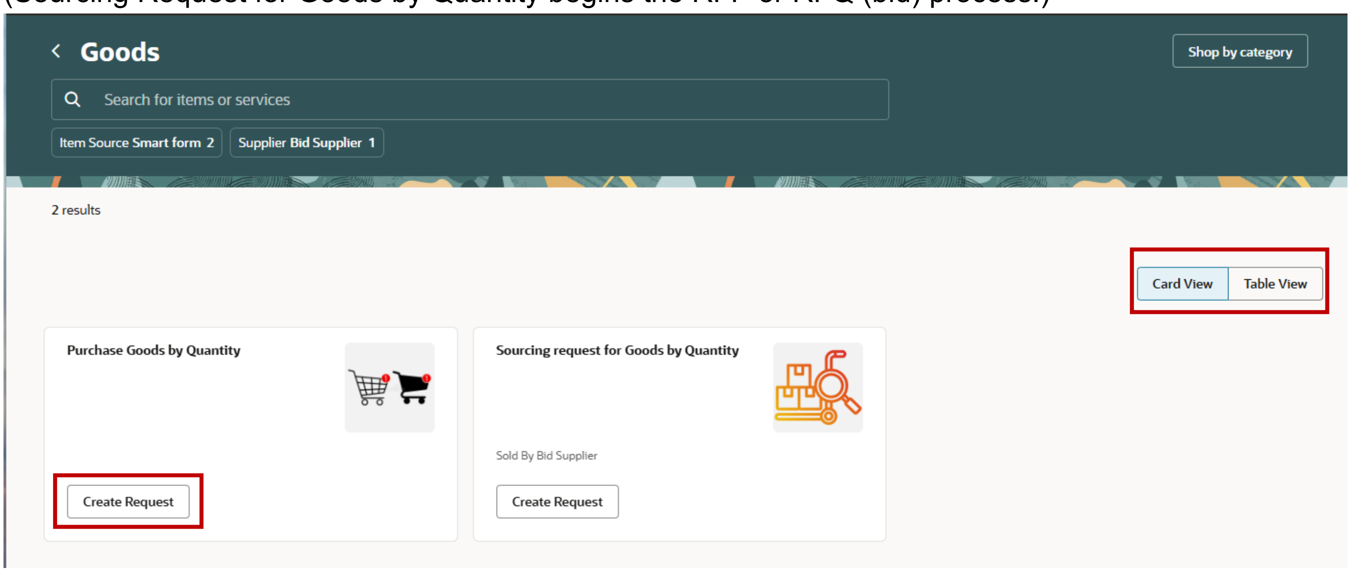
OR click the navigator menu (top left) and click the arrow on the **Procurement** row, then click on **Purchase Requisitions (New)**

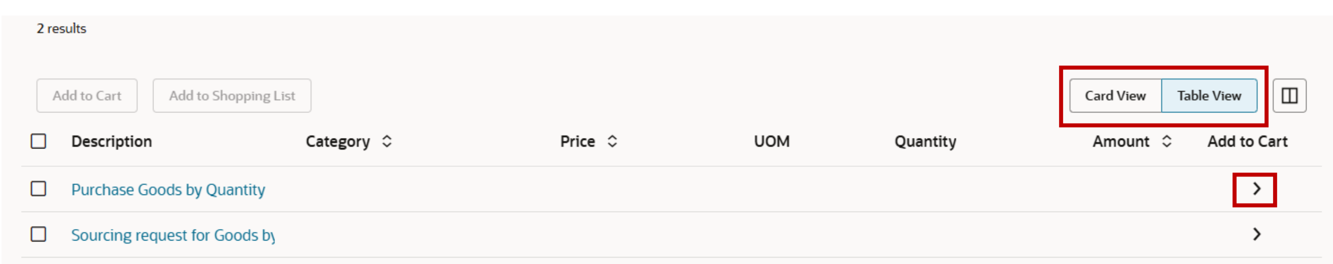


The **Self-Service Procurement** workspace will open. Click on **Goods**.



You can view the page as a card view or table view (list).
Purchase Goods by Quantity is for ordering. Click **on Create Request** to begin drafting your order. (Sourcing Request for Goods by Quantity begins the RFP or RFQ (bid) process.)

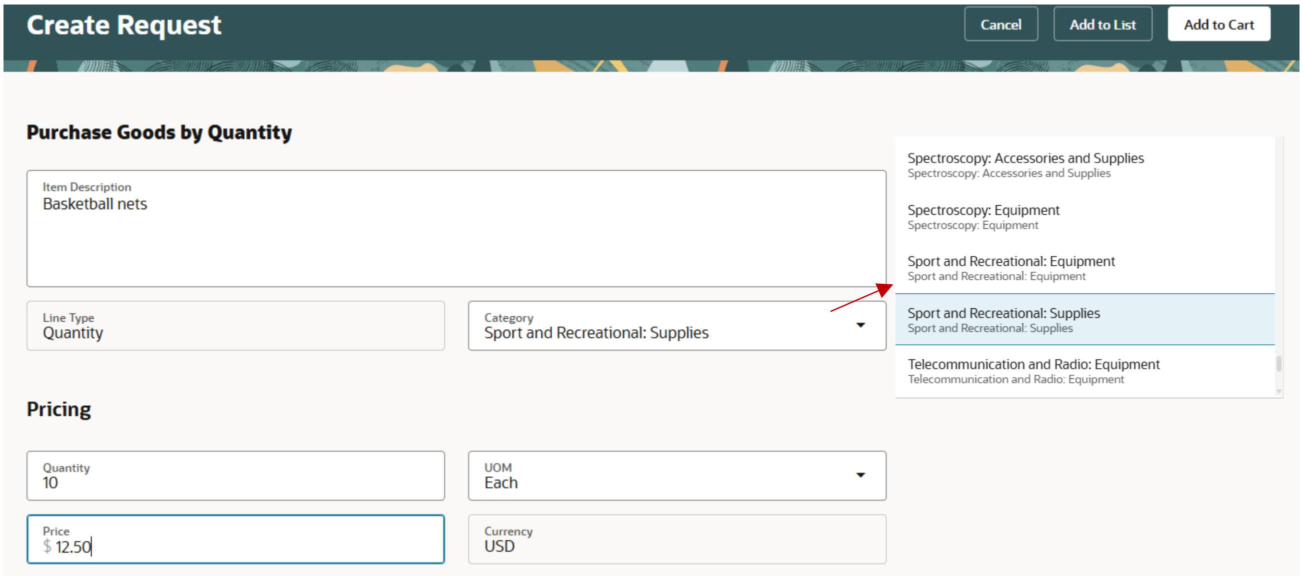




The **Create Request** page will open.

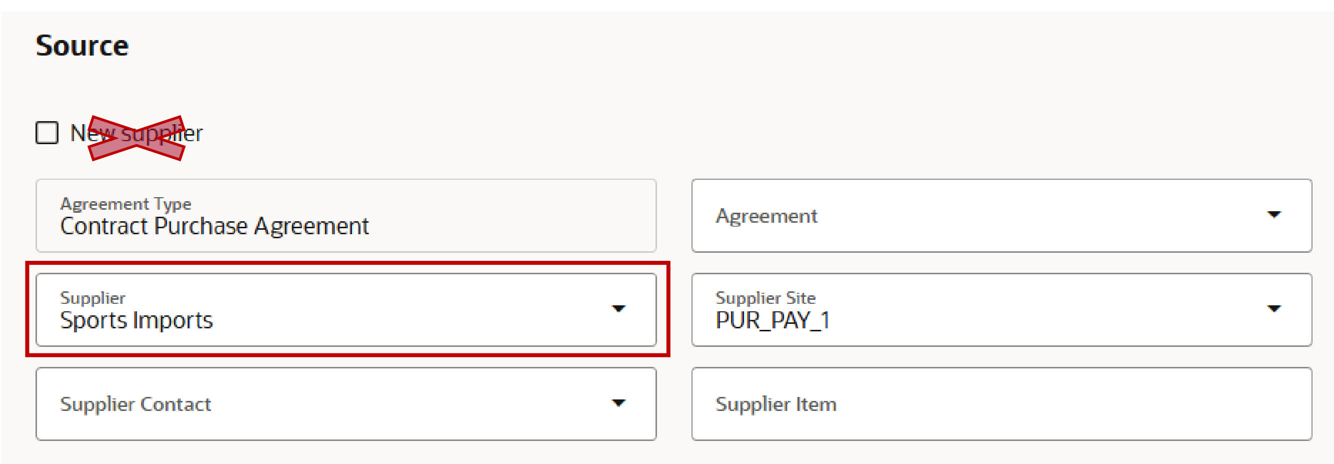
Fill in your **Item Description** and choose the proper **Category** from the pulldown list.
Note that many categories have a choice between Equipment (durable) and Supplies (expendable).

Enter your **Quantity**, the **Unit of Measure (UOM)**, and the **Price** per unit.

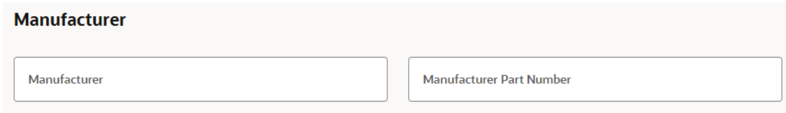


Find your **Supplier** using the pulldown and typing in the first few letters. Your supplier must already be in the system. If they are not, you will need to get your supplier registered with Procurement. *Please see separate instructions for the various methods to register a supplier.*
(the new supplier check box is not currently in use)

If your supplier has a contract, select it in the **Agreement** pull down.
Choose the correct **Supplier Site** (address) and **Contact.**
If the Supplier has an item number, enter it in the **Supplier Item** field.

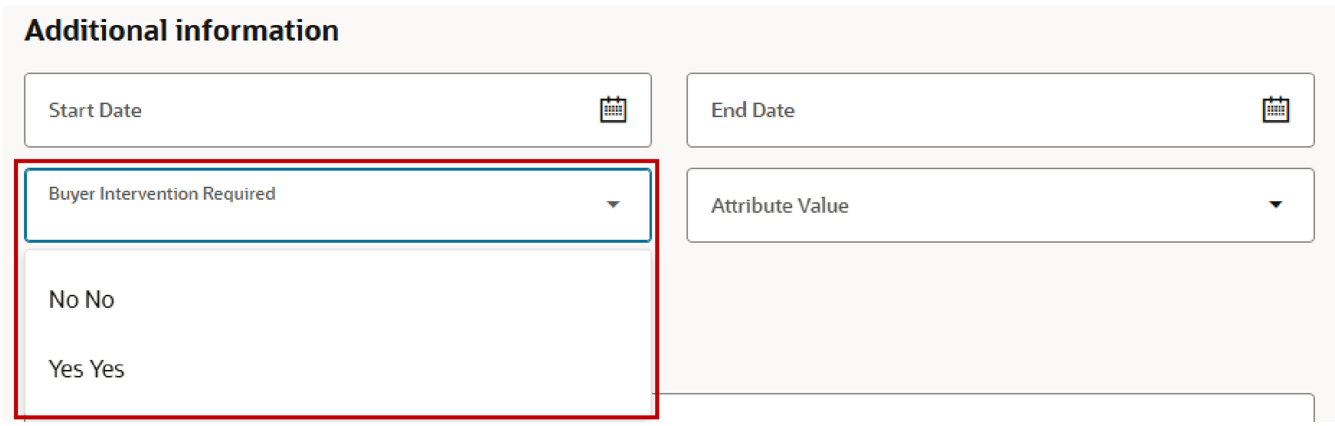


The **Manufacturer & Part Number** fields are available if needed for clarity in your order. They don't apply in all cases.

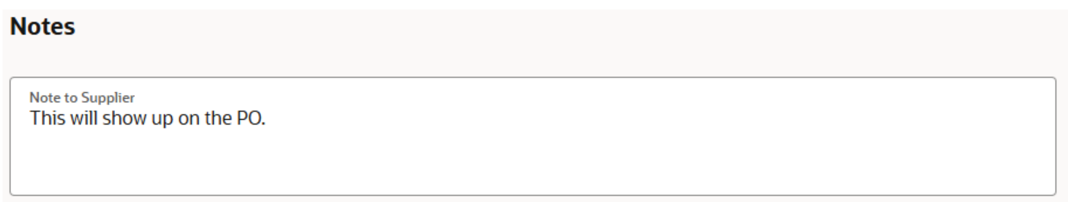


The **Buyer Intervention Required** field allows you to flag a low-dollar order to stop in Procurement rather than auto-approve. This is used when you need a document signed or some other intervention from the Procurement team.

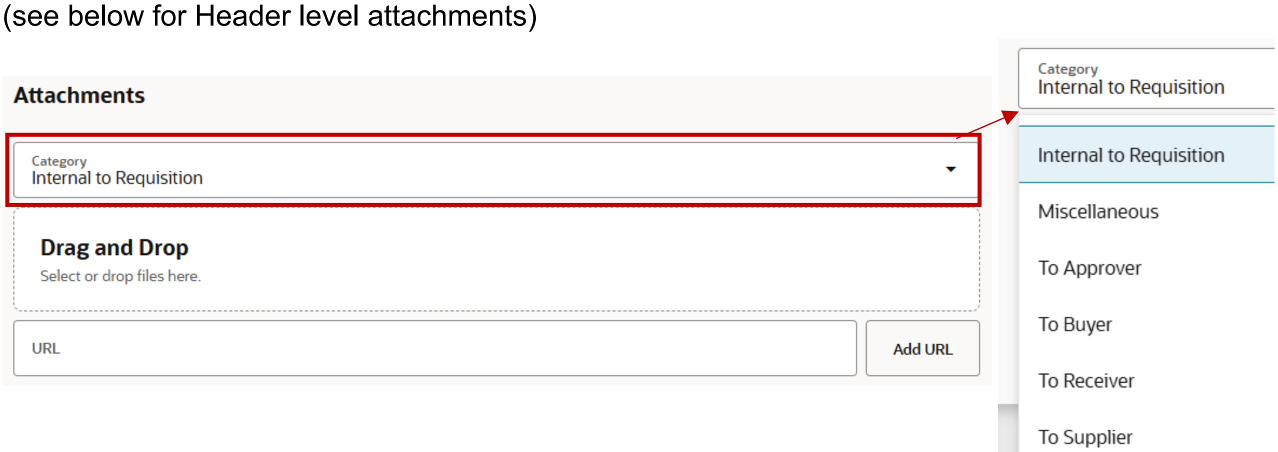
Other Additional information fields can be used as needed.



This **Notes** field is at the Line level.



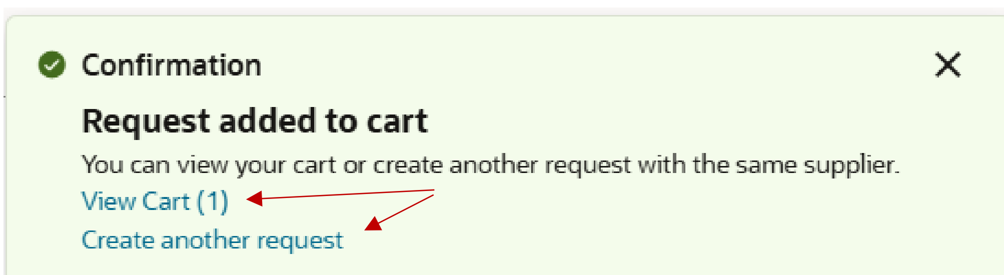
Add any **Attachments** you need at the Line level and select how / who they will show. (see below for Header level attachments)



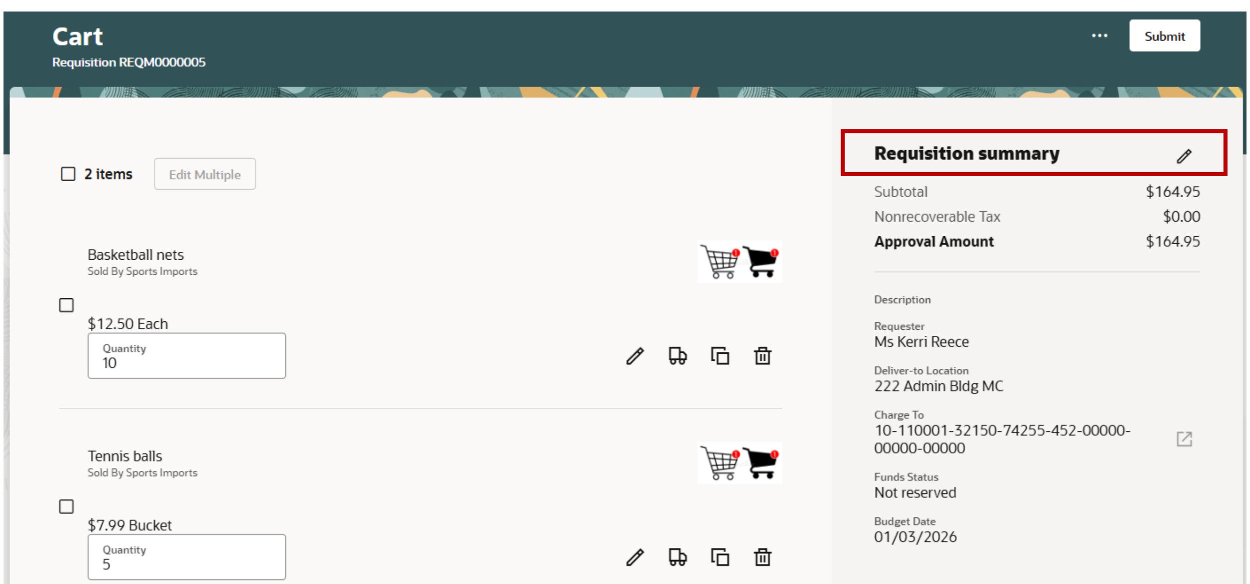
Internal to Requisition = attached to Requisition in the system
Miscellaneous = not currently used
To Approver = sent in email to the approver and attached to Requisition in the system
To Buyer = sent in email to the procurement team and attached to Requisition in the system
To Receiver = sent in email to the receiver and attached to Requisition in the system
To Supplier = sent with PO to the supplier and attached to Requisition in the system

When your line is ready, scroll to the top and click **Add to Cart**

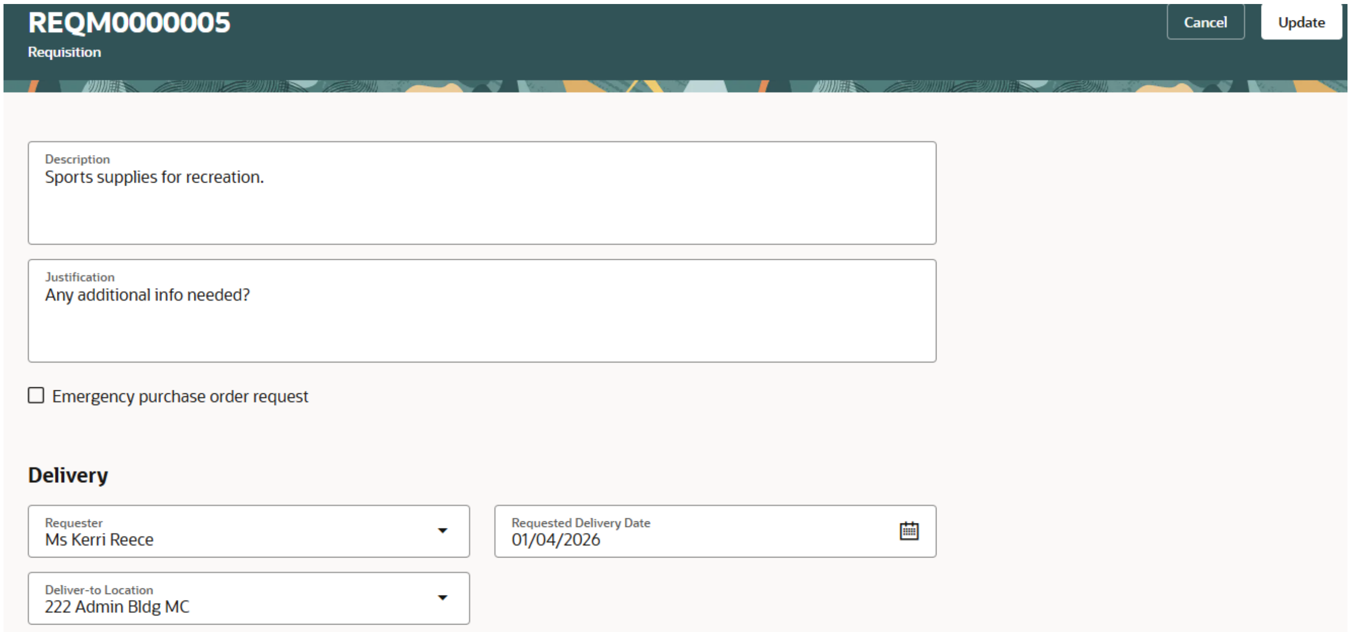
A confirmation will pop up. From that message you can add a line by clicking **Create another request** or go to the **cart** to complete your purchase. The number next to the cart is the number of items currently in the cart.

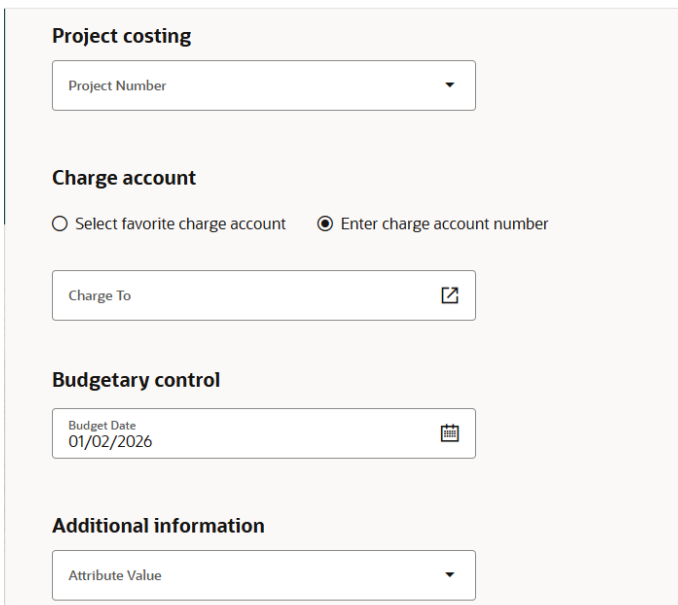


Your cart will process and open as a draft Requisition.
Click the **pencil** in the **Requisition Summary** (top right) to complete the Requisition header.



Add a description and your business purpose in the **Description** field.
Under the Delivery section you will see your default information. You can change this if needed.





If this is a project related expense, fill in the **Project Costing** field.

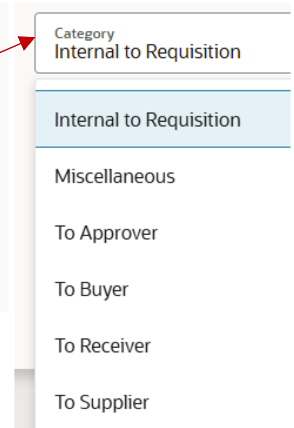
Otherwise, you will use the **Charge account** field to enter your COA (Chart of Accounts). This is for the overall order. Splitting or charging lines separately is at the line level (see below)

The **Budgetary control** field would be used in June / July to indicate the correct fiscal year budget to use.

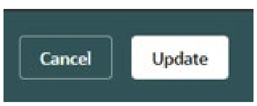
Additional information is not currently used.

The **Notes** section is available if needed. This is at the header level

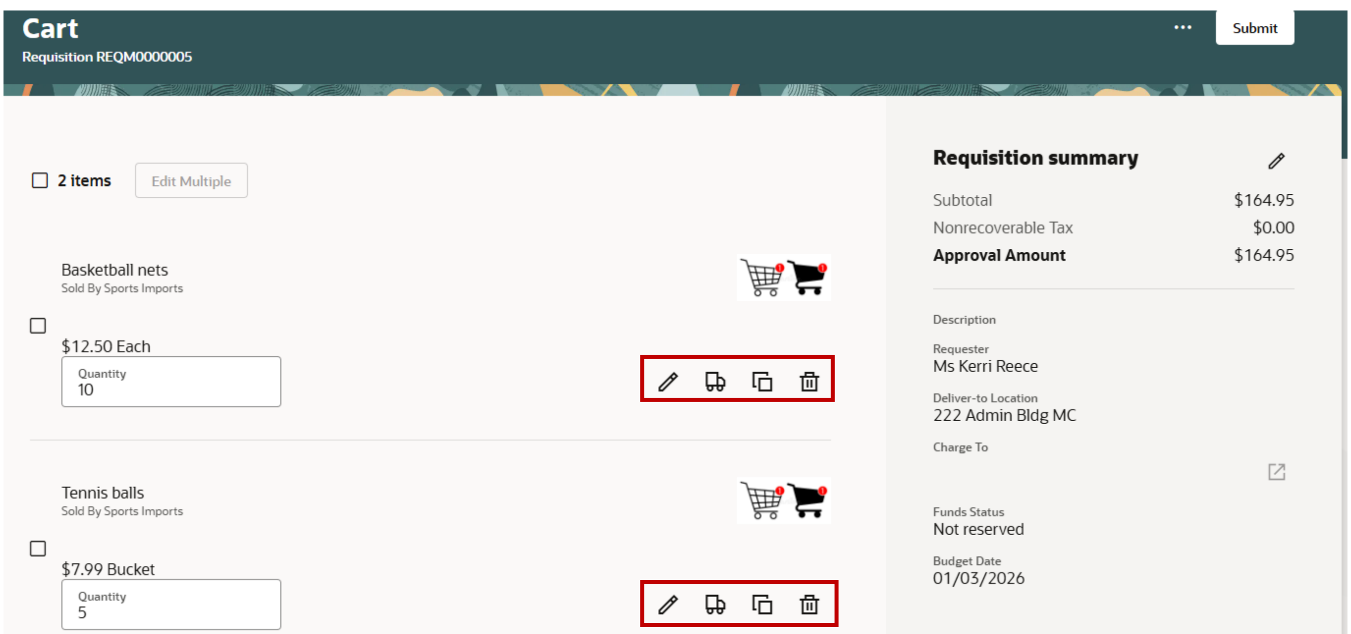
This **Attachments** field is at the header level. Select how / who they will show.



Internal to Requisition = attached to Requisition in the system
Miscellaneous = not currently used
To Approver = sent in email to the approver and attached to Requisition in the system
To Buyer = sent in email to the procurement team and attached to Requisition in the system
To Receiver = sent in email to the receiver and attached to Requisition in the system
To Supplier = sent with PO to the supplier and attached to Requisition in the system

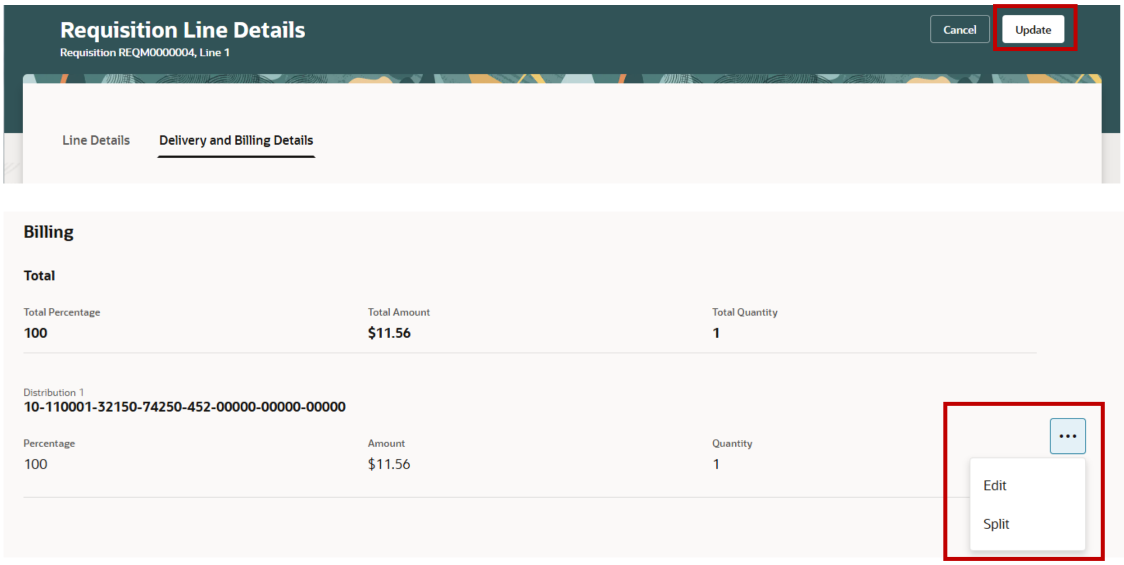


Scroll up to the top and hit **Update** to save the information and return to the Cart screen. You will see the information on the right side of the screen has updated. You can now work on individual lines.

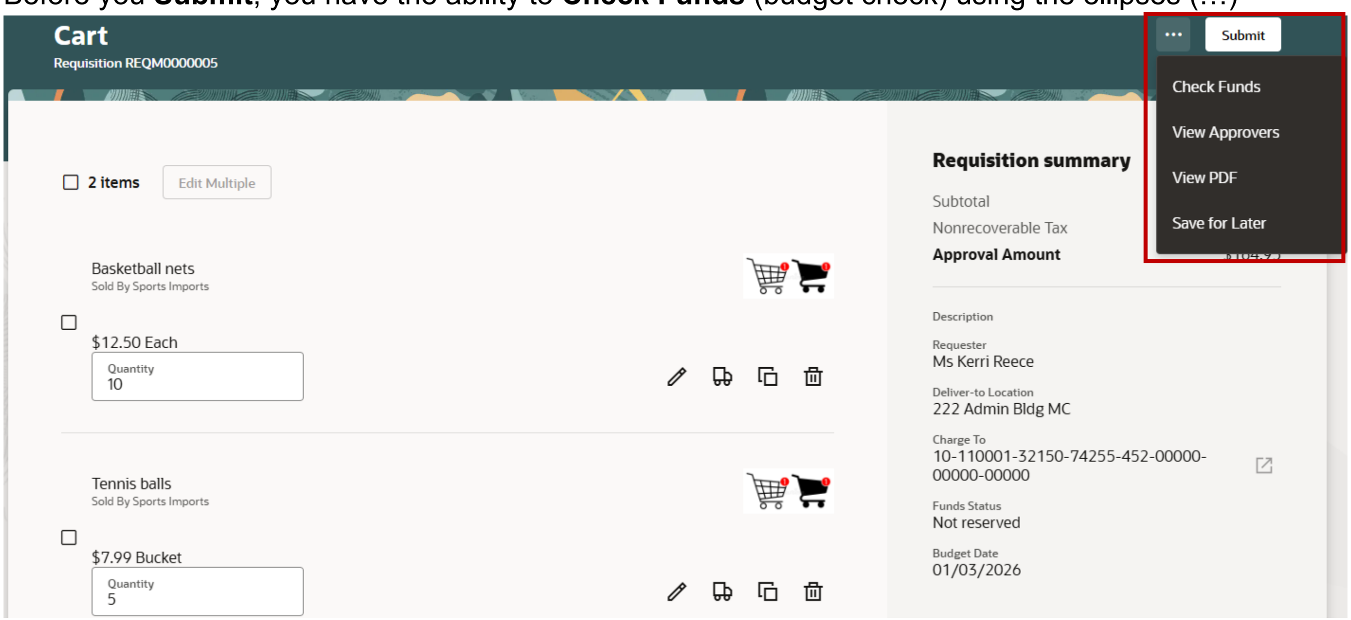


- The **pencil** takes you to **line details** if you need to edit anything.
- The **truck** takes you to **delivery & billing**. This is where you split a line or code it differently from the overall order.
- The **squares** will create a duplicate line.
- The **trash can** deletes the line.

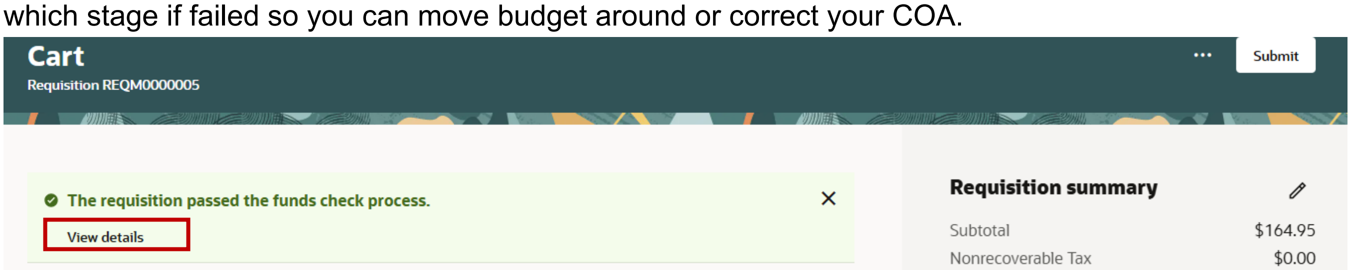
Under the **Delivery and Billing Details** tab, the lines have an ellipses (…) menu that allows you to edit or split the COA details for the line. Once you have everything the way you need it, click the **Update** button.

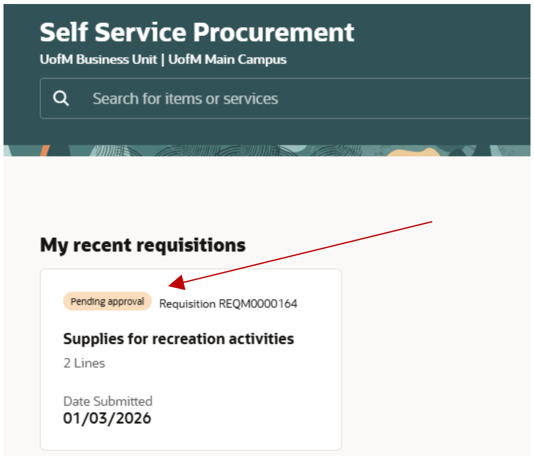


Before you **Submit**, you have the ability to **Check Funds** (budget check) using the ellipses (…)



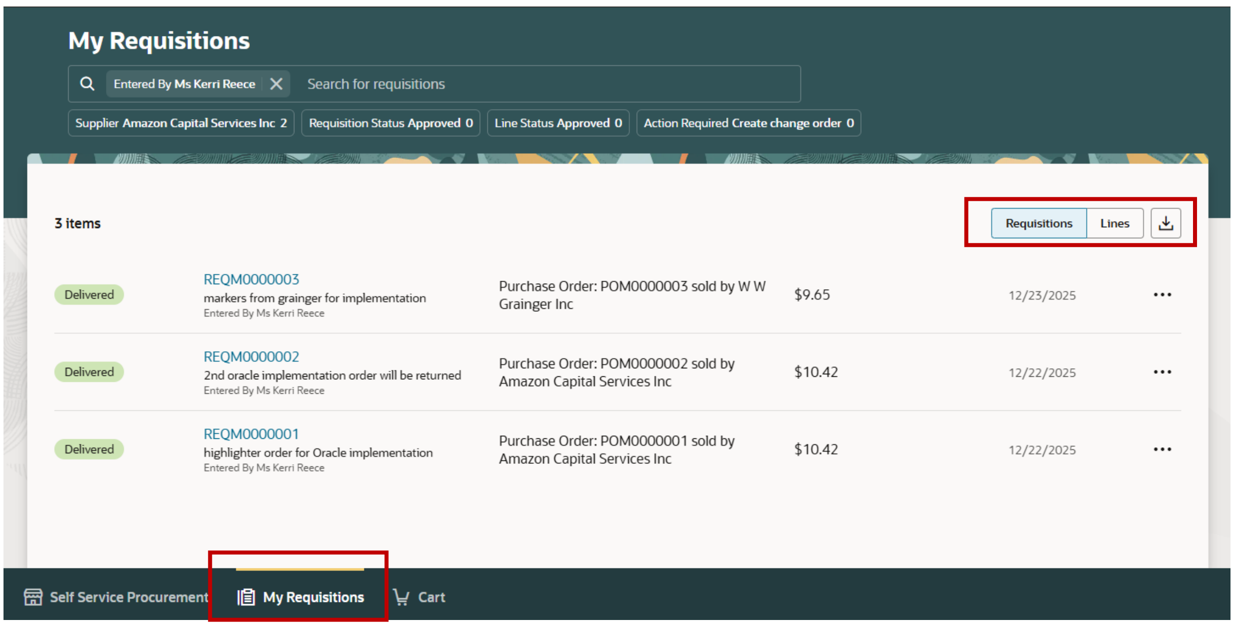
You'll see a message across the top. If it does not pass the budget check, **View details** will let you see which stage if failed so you can move budget around or correct your COA.





Once you hit submit, you will see a quick confirmation message and return to the Self-service procurement page. Your recent Requisitions are here on cards. The status will update as the order progresses. You can click the card to open the Requisition.

You can also view a list of Requisitions or Requisition Lines by clicking **My Requisitions** at the bottom of the page. You can also export the list(s) to excel using the download button.



The export gives you a clean worksheet that allows you to work with your data immediately.