

PO.020.870 – CREATING A PURCHASING REQUISITION

Purpose	<ul style="list-style-type: none"> To create a requisition. To explain the types of information included on the Requisition pages. To explain the Requisition process from Requisition to Purchase Order to Dispatch to Vendor.
Description	<p>Requisitions consist of four basic elements: Headers, Lines, Schedules, and Distributions. Headers contain identifying information such as the requestor and requestor date. Lines identify the goods being requested. Schedules define when and where the goods will be delivered, and Distributions contain the accounting information. Each requisition has only one header, although it can have multiple lines, schedules, and distributions.</p> <p>There are five different statuses in the Requisition life cycle – Approved, Canceled, Complete, Open, and Pending Approval.</p> <p>Requestors with approval authority can approve the Requisition after entering the Requisition data. Once the Requisition has been approved, it is eligible for Budget Checking and sourcing into a Purchase Order.</p>
Security Role	BOR_PO_REQ_MAINT
Dependencies/ Constraints	None
Additional Information	

Procedure

Below are step by step instructions on how to create a requisition.

Step	Action
1.	Click the NavBar icon

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2.	Click the Navigator icon.
3.	Click the Purchasing link.
4.	Click the Requisitions link.
5.	Click the Add/Update Requisitions link.
6.	Click the Add button.
7.	Click the Look up Requester (Alt+5) button.
8.	Click an entry in the Requester column.
9.	Click the Yes button.
10.	Enter " Dell Laptop Docking Station - Black " in the Description field.
11.	Enter " 1 " in the Quantity field.
12.	Enter " EA " in the UOM field.
13.	Click the Category button.
14.	Enter " Comp " in the Description field.
15.	Click the Look Up button.
16.	Click an entry in the Description column.
17.	Enter " 1000.00 " in the Price field.
18.	Click the [-] button to minimize the menu.
19.	Click the Approve icon to change the status from " Open " to " Pending Approval ".
20.	<p>This Requisition is now in a Pending Approval Status.</p> <p>Note: A Requisitioner with the authority to approve requisitions would see as status of "Approved" when taking this action.</p> <p>A requisition in an Approved status would be ready to be sourced into a PO by a Buyer, manually, or a batch process.</p>
21.	Click the Save button.
22.	<p>Once a Requisition is Approved it is ready to be Budget Checked.</p> <p>This action will depend on the users authority.</p>