








# Entering a Requisition in e-Procurement

## *Overview*

This Job Aid entails the updated e-Procurement creation procedures for a Requisition.

## *New Icons*

Some icons have changed within the upgrade. Please be aware of these new icons and their related links.

-  Expand Section
-  Look up Glass
-  Comments
-  Comment field with previously existing comments.
-  Ship To Address
-  Spell Check
-  Line Details

## *Procedure*

In order to complete the following processes, you must have a Requester role. With this role you may also review, manage, and receive only the Requisitions **you** create. To create Requisitions for another Requester or review, manage, or receive another Requester's Requisitions, you must hold the Power Requester and/or Power Receiver roles. Please contact Purchasing at 644-6850 for more information regarding these roles.

## Navigation

eProcurement > Create Requisitions

### Step 1

The Create Requisition page requires defaults to be entered before adding lines/items on the Define Requisition tab.

This information will default to all lines.

Input:

Requisition Name: \*Optional

Vendor:

Category:

Unit of Measure:

Due Date:

Attention: \*Optional

Dept:

Fund:

*\*Only enter the following when using a Project!*

PC Bus Unit: FSU01

Project: <Your Project Number>

Activity: 1

Click: Continue

*Tips:*

Step 2

**Requisition Summary**

Description	Qty	UOM
Item # KS71085, 60" Plasma...	1	EA
Total Lines: 1		
Total Amount (USD): 1,200.00		

**Requester:** If you are entering a Requisition for another Requester input their User ID in the Requester field.




**Vendor:** If your vendor is not available select "SUGGEST" to allow it to be added later to the Requisition. \*See "Suggest New Vendor" Job Aid.

**PC Bus Unit:** FSU01 must be entered in this field **only** when using a Project. For any Non-Project budgets, leave this field empty.

**Unit of Measure (UOM):** Only use DOL (Dollar) for blanket orders.

Click: **Special Item** link

### Create Requisition

 [1. Define Requisition](#)  **2. Add Items and Services**  [3. Review and Submit](#)

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Templates](#) **Special Request**

#### Select a Request Type

<a href="#">Special Item</a>	Request an item that is not listed in the Catalog.
<a href="#">Fixed Cost Service</a>	Request a one-time service for a flat fee.
<a href="#">Variable Cost Service</a>	Request a service for which the fee is based on the time worked.
<a href="#">Time and Materials</a>	Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

**Notes:** Special Item link is the same as selecting "Goods" in 8.4  
To submit "Service" Requisitions, select either the Fixed Cost Service link  
or the Variable Cost Service link.

### Step 3

Add Items and Services page

Input:

Item Description:

Price:

Quantity:

Additional Information:

\*Comments optional

Click: Add Item

*\*When Add Item is clicked, this page will re-display blank to allow additional lines to be added.*

When all lines have been added...

Click: Review and Submit Tab

### Step 4

Review and Submit page is used to review line information and submit a Requisition to workflow.

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | **3. Review and Submit**

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Templates | **Special Request**

**Special Item**

\*Item Description:

\*Price:  \*Currency:

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit:  Florida State University

\*Requester:  Shearer, Kelley \*Currency:

Requisition Name:  Priority:

**Requisition Lines**

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Item # KS71085, 60" Plasma Flatscreen TV	MDC VACUUM PRODUCTS	1.0000	Each	1,200.000	1,200.00
2	Item # AA78221, Projector	MDC VACUUM PRODUCTS	1.0000	Each	500.000	500.00
<b>Total Amount:</b>						1,700.00 USD

Consolidate with other Reqs  Override Suggested Vendor

Shipping Line: 1 Due Date:  Quantity:

Status: Active \*Ship To:  [Modify Shipping Address](#)

Attention:

\*Distribute by:  SpeedChart:

**Accounting Lines**

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Entry Event	Dept	Fund	PC Bus Unit
1	Open		SUCA14	1.0000	100.0000	1,200.00	FSU01		227000	110	

Select All / Deselect All

**Justification/Comments**

Save as Template

[Find more items](#)



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*Note: If you have modified any distribution information you must budget check before saving to reinitialize workflow.*

Click the **Expand** icon to view more details for each line.

Click: **Save & Submit** to submit to workflow

OR

Click: **Save & Preview Approvals** to save the Requisition without submitting it to workflow.

*Tip:* Use the **Line Details** icon to see additional information for a specific line.

**Note:** When you click **Save and Preview Approvals** you may view the Approvers by clicking on the link. To then submit this Requisition, you must view the printable version and then close it and your Save and Submit button will become accessible again.



Confirmation Page

Notice: **Requisition ID**

Click: **Multiple Approvers** link to view workflow routing.

### Confirmation

<b>Requested For:</b>	Shearer, Kelley	<b>Number of Lines:</b>	1
<b>Requisition Name:</b>	0000212173	<b>Total Amount:</b>	100.00 USD
<b>Requisition ID:</b>	0000212173		
<b>Business Unit:</b>	FSU01		
<b>Priority:</b>	Medium		
<b>Budget Status:</b>	<a href="#">Valid</a>		

#### Requisition Approval Workflow

Line 1: Pending  
Alternate Users Test

Req Approval Workflow Path

Pending  
Multiple Approvers  
Dept Level 1 Approvers

[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#) [Check Budget](#)

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

Pop-up box shows who the approvers are for this Requisition

**Note:** The Department number seen on this page is the Department assigned to this Approver, not necessarily the Department your Requisition is routed to.

Click: **Close** to exit this pop-up box

<b>Approver #1</b>	
<b>Name:</b>	NETTER, JOHN
<b>EmplID:</b>	000022718
<b>Department:</b>	074000
<b>Supervisor ID:</b>	
<b>Telephone:</b>	850/644-4620
<b>Reports To Position Number:</b>	00051746
<b>Email ID:</b>	ps_invalid_email@admin.fsu.edu
<b>Approver #2</b>	
<b>Name:</b>	SIMS, LINDA
<b>EmplID:</b>	000002399
<b>Department:</b>	074000
<b>Supervisor ID:</b>	
<b>Telephone:</b>	850/644-6588
<b>Reports To Position Number:</b>	00055398
<b>Email ID:</b>	ps_invalid_email@admin.fsu.edu
<a href="#">Close</a>	



## *How to Code a Help Ticket*

For additional questions regarding creation of a Requisition in e-Procurement should be logged as a Help Ticket (in Parature).

To log a Help Ticket, go to [us.fsu.edu/help](http://us.fsu.edu/help)

Click **Submit a Ticket** link

Sign-in with your **FSU ID & Password**

Input the following for questions concerning this Job Aid or creating a Requisition in e-Procurement related issues:

Issue Area: **Purchasing**

Issue Type: **Requisition**

