



## Requisitions

State of Vermont  
Department of Finance & Management  
February - 2024

## Revisions to Manual

### February 2024

- Updated for PeopleTools 8.60 upgrade

### April 2019

- Manual finalized

### December 2018

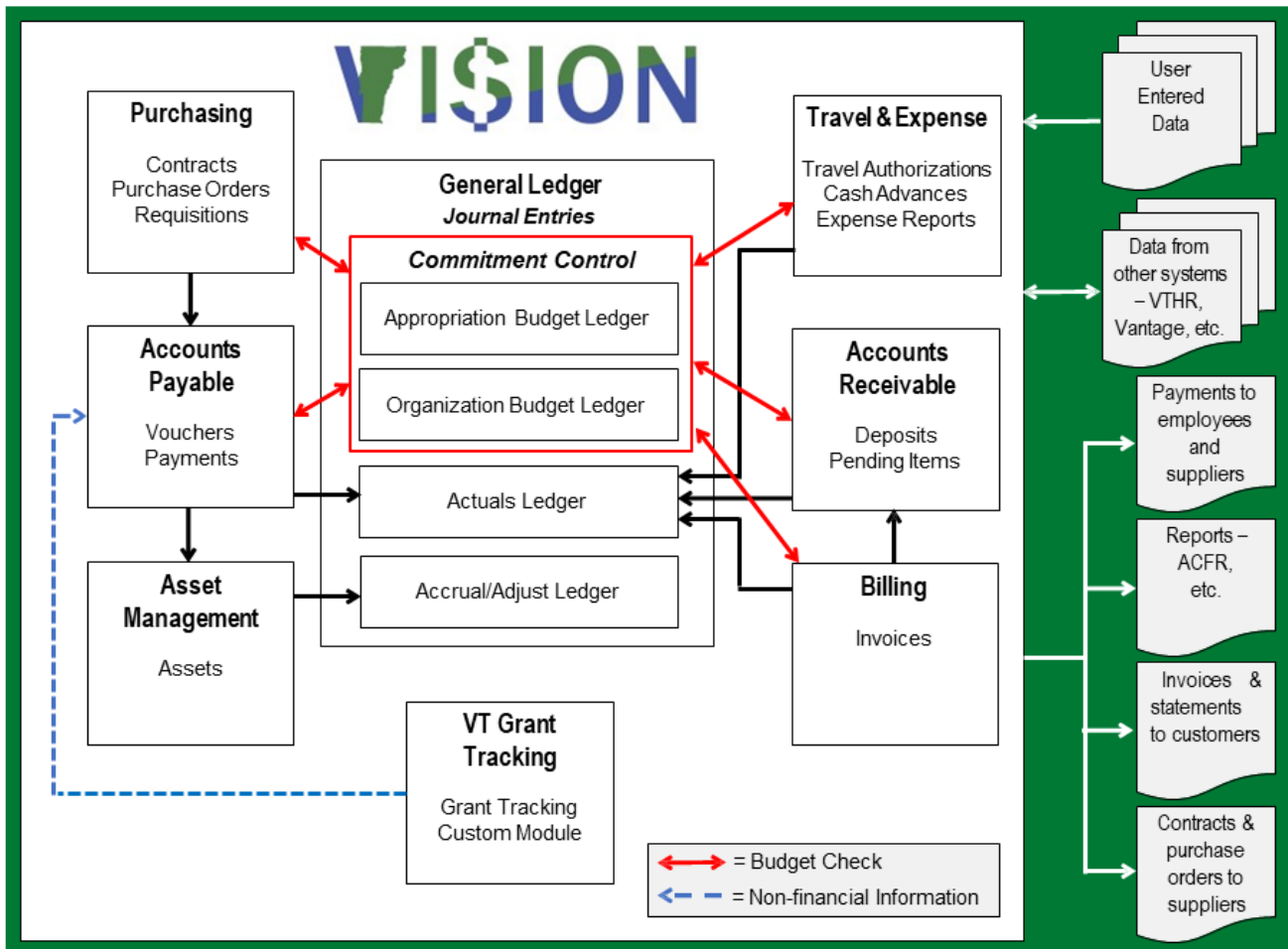
- Manual written

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## Introduction to Requisitions

### Overview of VISION Financial System



A Requisition is a request submitted through the State's VISION System to the BGS Office of Purchasing & Contracting to initiate the purchasing process. It contains details of the requested product such as description, quantity, delivery times and places and special terms and conditions. It serves as the authorization for the division to proceed to acquire the item(s). It is important that requisitions include a realistic estimate of the cost of the item being requested.

## Preparing a Requisition in VISION

A requisition must be entered in VISION if an item that you wish to purchase meets the following criteria:

- The item is not available under an existing statewide contract
- This item is not covered by a Blanket Delegation of Authority (BDA), refer to list of BDAs on the Office of Purchasing and Contracting website: <http://bgs.vermont.gov/purchasing-contracting/forms/bda>
- The item does not fall under a sole source purchase situation (see below)

To find out what goods and services are available from statewide contracts refer to the Current Contracts listing on the BGS Office of Purchasing & Contracting website. While this is an extensive list, you may not be able to find the contract you are looking for. If you want to know what contracts may be available for a specific commodity, contact the Office of Purchasing & Contracting.

Click on the commodity. For example, **Automotive**:

### CURRENT CONTRACTS

To see the text of a contract click on the contract number. If you need further information, send the purchasing agent an e-mail by clicking on their name. In order to view, navigate, download or print the contracts you will need the free.

[See the complete list of contracts where the purchasing card may be used as a method of payment](#)

To Search This Page Press "Control F"

<a href="#">Audio Visual</a>	
<a href="#">Automotive</a>	
<a href="#">Beds and Bedding</a>	<a href="#">Interior Coverings</a>
<a href="#">Building Supplies</a>	<a href="#">Laboratory and Field Equipment</a>
<a href="#">Clothing and Footwear</a>	<a href="#">Lawn and Grounds Equipment</a>
<a href="#">Communications</a>	<a href="#">Markers and Signs</a>
<a href="#">Computer Hardware, Software and Training</a>	<a href="#">Mail and Express Services</a>
<a href="#">Custodial Supplies</a>	<a href="#">Medical</a>
<a href="#">Document Destruction Services</a>	<a href="#">Newspaper Advertising</a>
<a href="#">Electrical Equipment, Supplies and Service</a>	<a href="#">Office Furniture</a>

The list of choices will come up:

### Automotive

**Model Year Cars, Vans, Pickups, SUVs etc**

- Ford Vehicles : Formula Ford, Contract [30323](#)
- Chevrolet Vehicles : Shearer Chevrolet, Contract [30331](#)
- GMC: Shearer Chevrolet, Contract [30289](#)
- Dodge Vehicles : Central Dodge Inc., Contract [30829](#)
- Subaru Vehicles : St. Johnsbury Subaru, Contract [30334](#)
- Toyota Vehicles : Alderman's Toyota, Contract [30252](#)

BDA's are issued by BGS and authorize departments to make specific types of purchases for items not available under statewide contracts. For a complete listing of BDA's please view the [BDA Index](#) on the BGS Purchasing & Contracting website.

A sole source purchase situation may arise and is defined as an award for the acquisition of a commodity or service from the only known capable supplier because of the unique nature of the requirements, time restraints, and supplier or market conditions. All sole source requests, regardless of the dollar amount, must be submitted in writing to the Office of Purchasing & Contracting with appropriate documentation. Sole source procurements are reviewed in accordance with the approvals required under Administrative Bulletin 3.5. Requests exceeding \$15,000 require approval from the Secretary of Administration and are submitted by the Office of Purchasing & Contracting on the department's behalf. In such instances, the Office of Purchasing & Contracting will submit the request to the Secretary of Administration, along with a memorandum from the Commissioner of Buildings and General Services in support of (or against) the request. All Sole Source contracts greater than \$100,000 must be approved by the Secretary of Administration prior to execution.

**Requisitioning Material:** A requisition line can be created by entering an existing Item ID from VISION, or by entering a description of what you need to purchase. When a line is created by description you will skip the Item ID field on the requisition and type the description of the material that is needed directly into the description field.

## **Office of Purchasing & Contracting**

So that a Purchasing Agent will know that you have entered a requisition for goods, the requisition needs to be approved and budget checked. Each Purchasing Agent runs a daily query in VISION that lists requisitions that have been entered into the system and are approved and budget checked. The Purchasing Agent then determines if a Request for Quote (RFQ) needs to be issued to Suppliers or if a contract would be more appropriate for the item(s).

In the case of an RFQ, when the process is complete, the Purchasing Agent will build a purchase order from the Requisition to the successful supplier from the Request for Quote procedure. The Office of Purchasing & Contracting will notify the requestor that the purchase order has been approved for release and is then available to the department to budget check and approve.

***Note: The purchase order should not be processed until notification is received from the Office of Purchasing & Contracting. Once notification has been received it is the department's responsibility to budget check and approve the purchase order and notify the supplier to order the material.***

If the Purchasing Agent decides that a contract would be more appropriate you will be notified that a new contract has been entered. You must then cancel and budget check the Requisition to release the pre-encumbrance on the budget. Then a purchase order can be entered against the new contract. The purchase order will need to be approved, budget checked and the supplier contacted to order the material.

## Reconciling Requisitions

Requisitions can be moved to complete on the Requisition Reconciliation Workbench if all the following are true:

- The requisition is in a Canceled status or has been sourced to a purchase order
- The requisition's related purchase order(s) have been moved to a complete status
- The Due date is less than or equal to the current date

Departments should follow the Month End Closing Instructions, located on the Finance and Management website at <http://finance.vermont.gov/policies-and-procedures/vision-closing-instructions>, as a guide to help in managing and reconciling requisitions.

## State of Vermont Required Fields

***Note: Departments may define additional required fields as needed for their own business processes.***

### Maintain Requisitions (Main Page)

- Requester
- Requisition Date (defaults as current date, accept default)
- Origin
- Accounting Date (defaults as current date, accept default)
- Item (if applicable Item can be found in VISION) or
- Description (required if there is not Item entered)
- Quantity
- Unit of Measure (UOM)
- Category
- Price (cannot be zero). Use the previous purchase price or an estimated price if an existing item number is not being used

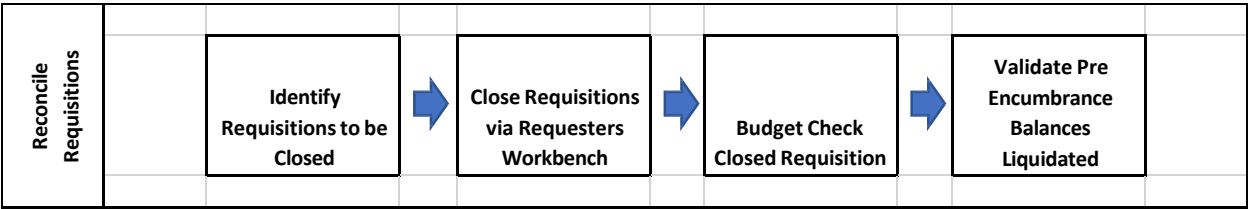
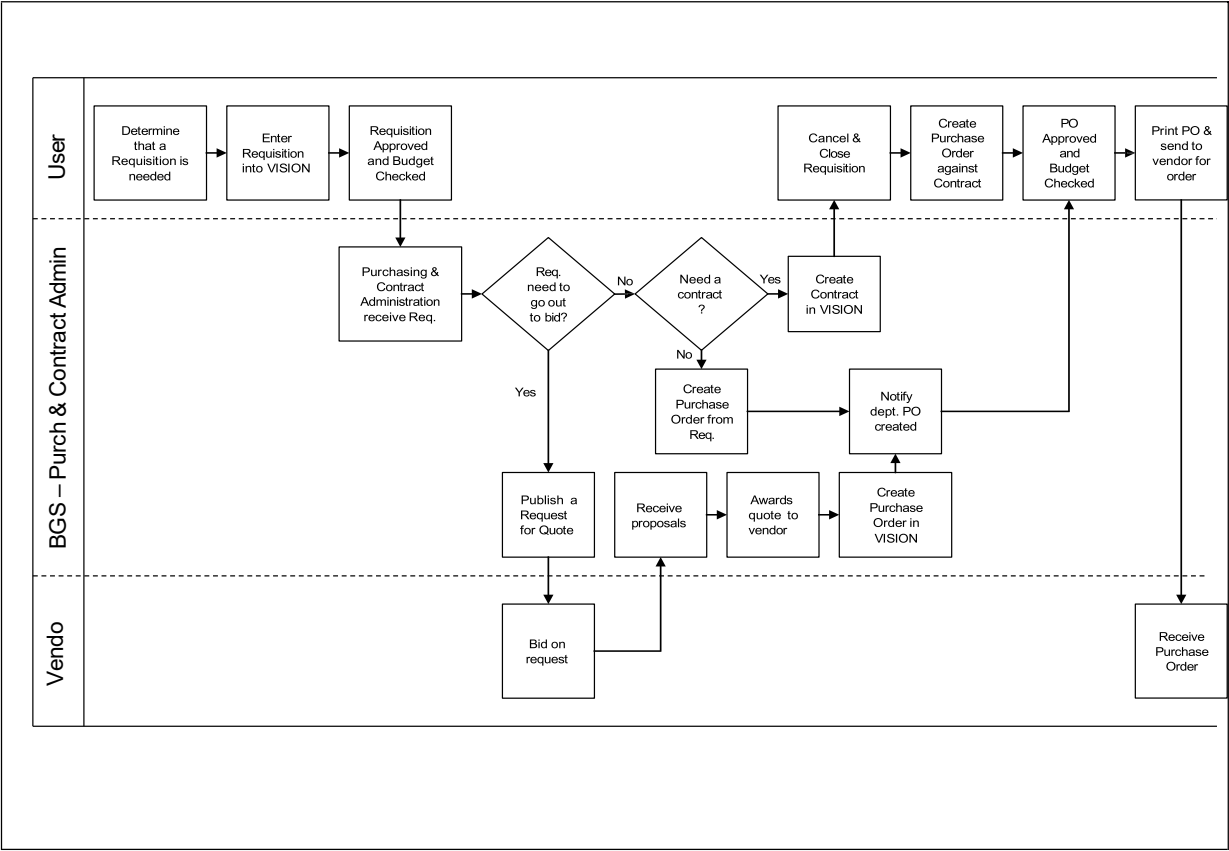
### Maintain Requisitions (Schedule Page)

- Ship To
- Quantity (defaults from main page)
- Price (defaults from main page)
- Due Date

### Maintain Requisitions (Distribution Page)

- Account
- Fund
- Dept ID

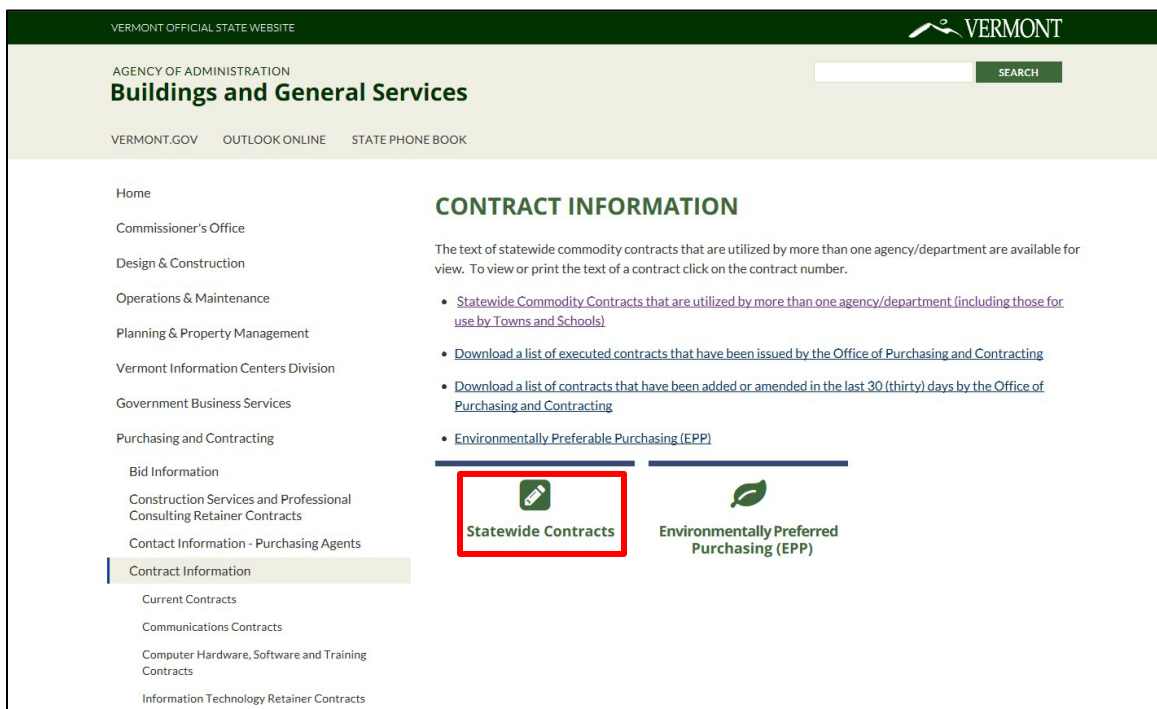
Requisition Process Flow Chart





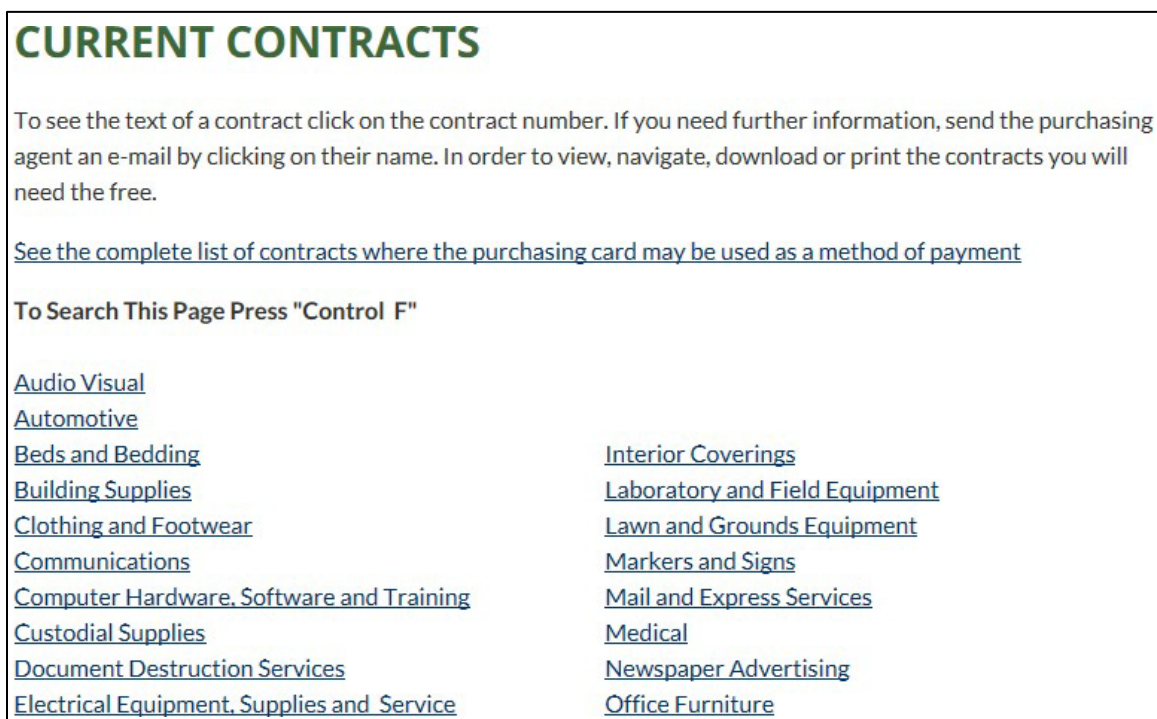
## How to determine if a Commodity is on Contract

**Navigation:** Go to the Purchasing and Contract Administration website at <http://www.bgs.vermont.gov/purchasing-contracting/contract-info>:



1. Click on **Statewide Contracts**

The **Current Contracts** page displays:



2. To search the page press **Control + F** or select a category

## Building Supplies

- Lumber and Building Supplies
  - LaValley Building Supply Inc, Contract 34436
  - Poulin Lumber, Contract 34441
- Hardwood Plywood
  - Atlantic Plywood Corporation, Contract 36064
- Plumbing and HVAC Supplies
  - Granite Group, Contract 30953
  - F. W. Webb, Contract 31324

# **State of Vermont**

Buildings and General Services  
Office of Purchasing & Contracting  
109 State St.  
Montpelier VT 05609-3001  
USA

## **CONTRACT**

**Vendor ID:** 0000055484  
**LaValley Building Supply Inc**  
PO Box 935  
Rutland VT 05702-0955  
USA

<b>Contract ID</b> 000000000000000000000034438		<b>Page</b> 1 of 4
<b>Contract Dates</b> 08/01/2017 to 07/31/2019		<b>Origin</b> CPS
<b>Description:</b> CPS-LUMBER & BUILDING SUPPLIES		<b>Contract Maximum</b> \$999,999.00
<b>Buyer Name</b> Shan Jon Berni	<b>Buyer Phone</b> 855/628-2217	<b>Contract Status</b> Approved

**Phone #:**

Line #	Item ID	Item Desc	UOM	Unit Price	Max Qty.	Max Amt
1		SPRUCE .2X4X8	EA	4.64000	0.00	0.00
2		SPRUCE .2X4X10	EA	6.59000	0.00	0.00
3		SPRUCE .2X4X12	EA	7.90000	0.00	0.00
4		SPRUCE .2X4X16	EA	10.54000	0.00	0.00
5		SPRUCE .2X6X8	EA	5.84000	0.00	0.00
6		SPRUCE .2X6X10	EA	9.04000	0.00	0.00
7		SPRUCE .2X6X12	EA	10.86000	0.00	0.00
8		SPRUCE .2X6X16	EA	12.66000	0.00	0.00
9		SPRUCE .2X8X8	EA	9.28000	0.00	0.00
10		SPRUCE .2X8X10	EA	10.54000	0.00	0.00
11		SPRUCE .2X8X12	EA	12.66000	0.00	0.00
12		SPRUCE .2X8X16	EA	16.87000	0.00	0.00
13		PRESSURE TREATED .2X4X8	EA	6.09000	0.00	0.00
14		PRESSURE TREATED .2X4X10	EA	7.38000	0.00	0.00
15		PRESSURE TREATED .2X4X12	EA	9.08000	0.00	0.00
16		PRESSURE TREATED .2X4X16	EA	12.38000	0.00	0.00
17		PRESSURE TREATED .2X6X8	EA	8.27000	0.00	0.00
18		PRESSURE TREATED .2X6X10	EA	11.21000	0.00	0.00
19		PRESSURE TREATED .2X6X12	EA	13.46000	0.00	0.00
20		PRESSURE TREATED .2X6X16	EA	17.73000	0.00	0.00
21		PRESSURE TREATED .2X8X8	EA	11.03000	0.00	0.00
22		PRESSURE TREATED .2X8X10	EA	13.07000	0.00	0.00
23		PRESSURE TREATED .2X8X12	EA	17.41000	0.00	0.00
24		PRESSURE TREATED .2X8X16	EA	22.34000	0.00	0.00
25		NO LONGER AVAILABLE	EA	0.01000	0.00	0.00
26		PLYWOOD .1/2" 4X8	EA	0.01000	0.00	0.00

OSB: \$20.23  
CDX: \$24.91

## Enter a Requisition in VISION

**Situations when this function is used:** Enter a requisition when you need to purchase an item that the STATE doesn't currently have a contract for, is not covered by a blanket delegation of authority (BDA) and has a dollar value greater than \$3,500.00.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

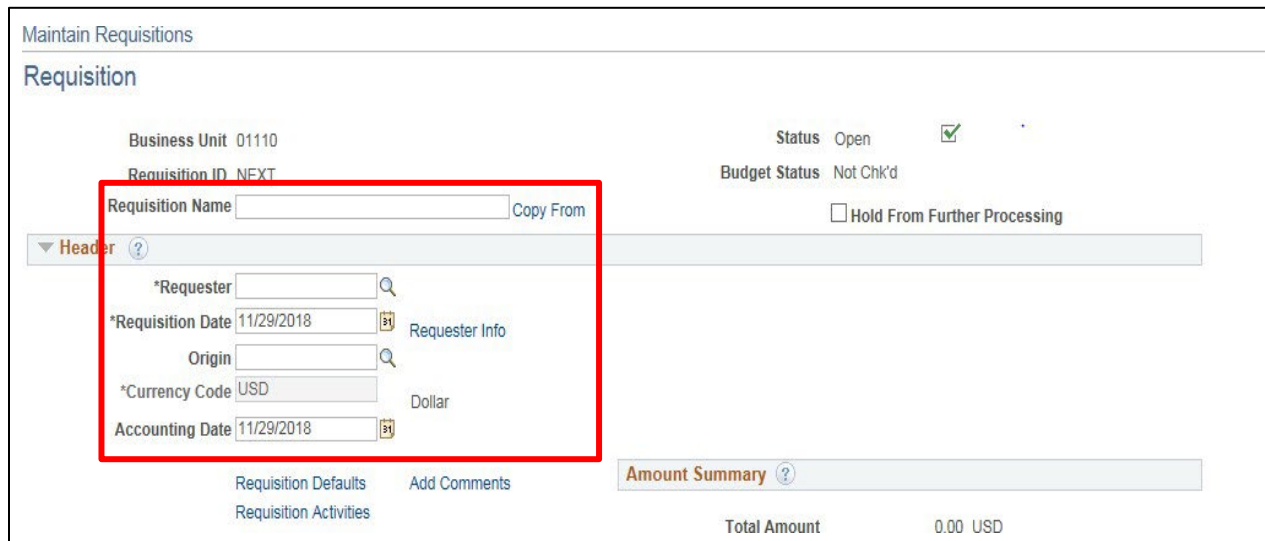
**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays:



1. **Business Unit** - Your default BU will appear in the Business Unit field
2. **Requisition ID** - Defaults as NEXT
3. Click **Add**

The **Maintain Requisitions** page displays:



4. **Requisition Name** - If nothing is entered, the **Requisition ID** will populate this field
5. **Requester** - If nothing defaults click the magnifying glass and select your name
6. **Requisition Date** - Will default in as current date. **DO NOT** change the date
7. **Origin** - If your dept. origin code doesn't default in click the magnifying glass to select it from a list
8. **Accounting Date** - Will default in with the current date. **DO NOT** change the Accounting Date

Add Items From ?

Purchasing Kit Catalog  
Item Search Requester Items

Line ? Personalize | Find | View All | First 1 of 1 Last

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Snow Removal	0.0000	EA	96172	1,000.0000	0.00	Open

View Printable Version \*Go to ...More...

Save Notify Refresh Add

**9. Description** - Type in the description of item(s) or service(s) that are needed, it's important to be specific

**10. Quantity** - Enter the quantity needed

**11. Unit of Measure** - Enter a unit of measure for the item or service or click on the **Magnifying Glass** to select from a list of values

**12. Category** - Enter the 5-digit category the item or service most closely relates to or click on the magnifying glass and select from the list of values

**13. Enter Price** - Enter the price you expect to pay for the item or service

**14.** If additional lines are needed click the plus sign + at the end of the line

A Message window opens asking how many additional lines you'd like to add:

Script Prompt:

Enter number of rows to add:

1

OK Cancel

**15.** Enter the number of rows to add

**16.** Click **OK**

Line ? Personalize | Find | View All | First 1-2 of 2 Last

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Snow Removal	1.0000	EA	96172	1,000.0000	1,000.00	Open
2			0.0000			0	0.00	Open

View Printable Version \*Go to ...More...

**17.** Once all lines have been entered click on the **Schedule** icon

You are returned to the **Maintain Requisitions** page:

Maintain Requisitions

Schedule

Business Unit 01110 Requisition Date 10/26/2018

Requisition ID NEXT Status Open

Return to Main Page

Line

Find | View All First 1 of 1 Last

1 Item Snow Removal Quantity 1.0000 Each Merchandise Amt 1,000.00 USD

Schedule Personalize | Find | View All | First 1 of 1 Last

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PAOTB/Q	1.0000	1,000.00000	1,000.00	11/15/2018	Jarvis, Tanya	Active

**18. Ship To Location** - Enter a ship to location, the following format exists in Purchasing for Ship To locations:

- P = Purchasing
- FM = Origin Code for the Agency/Department
- MTP = Abbreviation for city/town
- 001 = First location for that origin code in the city/town

**19. Due Date** - Enter a due date, if you need the item sooner than 45 days, BGS Office of Purchasing & Contracting requests you please make note in the Comments section of the Requisition.

**20.** Click the **Distribution** icon

The following **Message** will open:

Message

Price will be overridden by system calculated price when changing Ship To Location

A change to the ship to can result in a price change, a sales and use tax recalculation, or a VAT recalculation.

OK

**21.** Click **OK**

A second **Message** will open if the **Due Date** is more than 30 days in the past or future;

Message

Warning -- date out of range. (15,9)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

OK

**22.** Click **OK**

Maintain Requisitions

### Distribution

Requisition ID NEXT      Item      [Snow Removal](#)

Line 1      Status Active

Schedule 1

Ship To PAOTBAR001      Quantity 1.0000 EA

\*Distribute By Amount      Open Amount 1,000.000

Merchandise Amt 1,000.00 USD

SpeedChart      [Multi-SpeedCharts](#)

**Distributions**      Personalize | Find | View All | [1 of 1](#) | First | Last

Distrib	Status	Percent	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1	Open	100.0000	1,000.00	01110	510300						

[OK](#)   [Cancel](#)   [Refresh](#)

23. Enter the appropriate **chartfield data** for your department

24. Click **OK**

The **Schedule** page displays:

Maintain Requisitions

### Schedule

Business Unit 01110      Requisition Date 10/26/2018

Requisition ID NEXT      Status Open

[Return to Main Page](#)

Line      Find | View All      First | 1 of 1 | Last

1	Item	Snow Removal	Quantity	1.0000	Each	Merchandise Amt	1,000.00	USD																
<p><b>Schedule</b>      Personalize   Find   View All   <a href="#">1 of 1</a>   First   Last</p> <p><a href="#">Details</a>   <a href="#">1 of 1</a></p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>PAOTB</td> <td>1.0000</td> <td>1,000.00000</td> <td>1,000.00</td> <td>11/15/2018</td> <td>Jarvis, Tanya</td> <td>Active</td> </tr> </tbody> </table>									Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	1	PAOTB	1.0000	1,000.00000	1,000.00	11/15/2018	Jarvis, Tanya	Active
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status																	
1	PAOTB	1.0000	1,000.00000	1,000.00	11/15/2018	Jarvis, Tanya	Active																	

Add Ship To Comments

[Save](#)   [Notify](#)   [Refresh](#)      [Add](#)   [Update/Display](#)

25. Click the **Return to Main Page** link

Maintain Requisitions

### Requisition

Business Unit 01110      Status Open      ☒

Requisition ID NEXT      Budget Status Not Chk'd      [Requester Info](#)

Requisition Name Amount Only Snow Removal      Copy From      ☐ Hold From Further Processing

▼ Header      ?

\*Requester TJARVIS      Jarvis, Tanya

\*Requisition Date 10/26/2018      [Requester Info](#)

Origin FM      Finance & Management

\*Currency Code USD      Dollar

Accounting Date 10/26/2018      [Requester Info](#)

[Requisition Defaults](#)   [Add Comments](#)   [Amount Summary](#)   ?

Requisition Activities      Total Amount 1,000.00 USD

26. Click the **Add Comments** link



The **Header Comments** window opens:

Header Comments

Business Unit 01110 Requisition Date 10/26/2018  
Requisition ID NEXT Status Open

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last  
Use Standard Comments Comment Status Active Inactivate +

Snow Removal as requested by Agency

☒ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher

Associated Document  
Attachment Attach View Delete Email

From -> REQ 01110-NEXT

OK Cancel Refresh

27. Add comments that relate to the Requisition as a whole. **It is important to be specific about your delivery requirements as the items may be delivered by an independent company** (i.e. Inside delivery is required to the 3<sup>rd</sup> Floor, only accept deliveries on Tues & Thurs between 12-3, because of loading dock location deliveries cannot be accepted by anything larger than a box truck)

28. Once you've entered the comments check the **Send to Supplier** checkbox

29. To add an attachment to the Requisition, click **Attach** on the Header Comments Page

A **File Attachment** window opens:

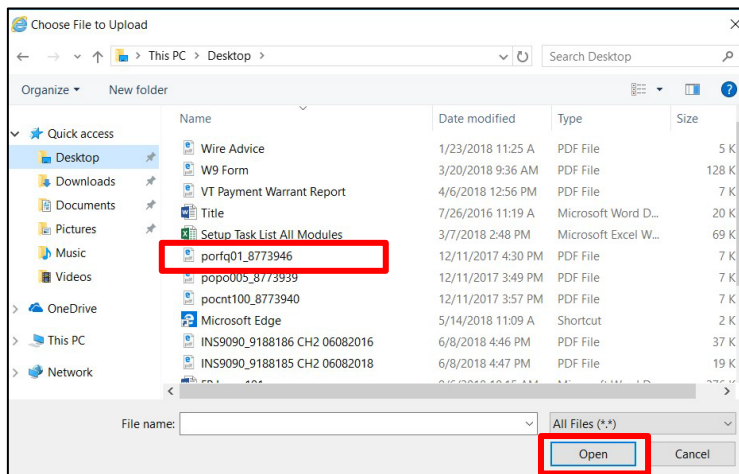
File Attachment

Choose File No file chosen

Upload Cancel

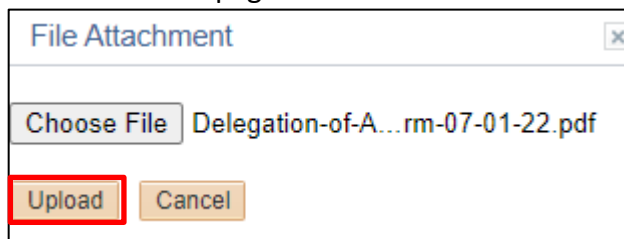
30. Click **Chose File** to search for files to choose to upload as an attachment. Note that you can select files on local or network drives that your computer has access to

The **Choose a File** window opens:



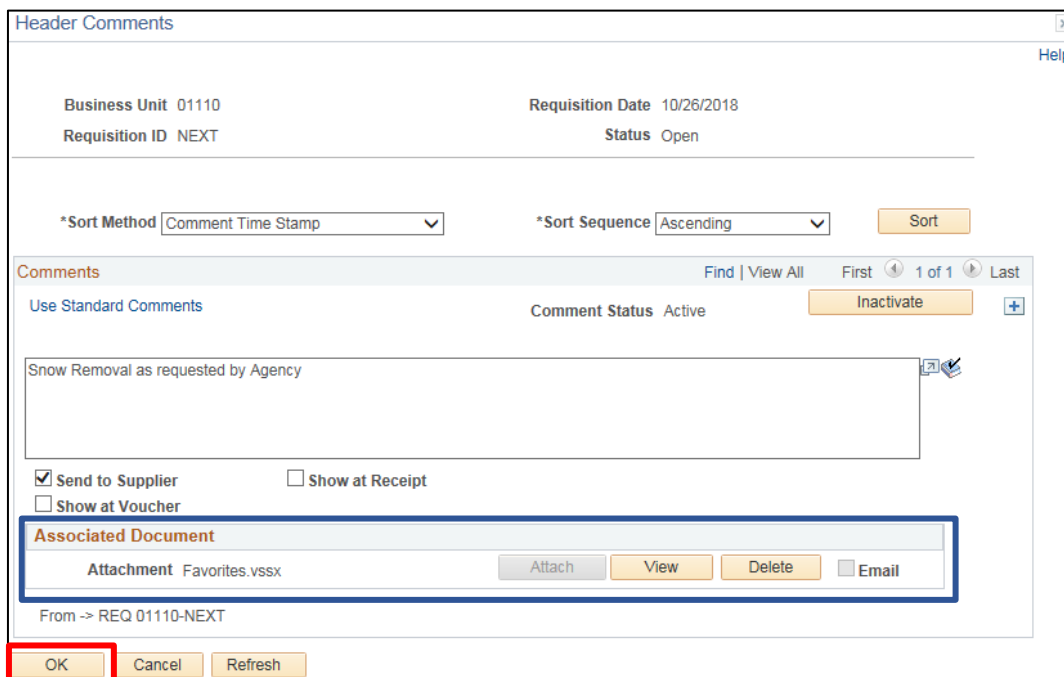
**31.** Select the file and click the **Open** button

You will be returned to the File Attachment page with the file name selected defaulted in:



**32.** Click **Upload** to upload your attachment to the Requisition.

You are returned to the **Header Comments** page, and the attachment is displayed in the **Associated Document** section:



**33.** Once all comments and attachments have been entered click **OK** at the bottom of the page



The screenshot shows the 'Add Items From' window with a table of requisition lines. The table has columns: Line, Item, Description, Quantity, \*UOM, Category, Price, Merchandise Amount, and Status. Line 1 is highlighted, and a red box is drawn around the 'Comments' icon in the right-hand column of the table.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Snow Removal	1.0000	EA	96172	1,000.0000	1,000.00	Open
2			0.0000			0	0.00	Open

34. Click the **Line Comments** icon for specific information about the line item(s)

The screenshot shows the 'Line Comments' window. It displays business unit information (01110), requisition date (10/26/2018), and requisition ID (NEXT). The status is 'Open' and the line is '2'. The 'Sort Method' is 'Comment Time Stamp' and the 'Sort Sequence' is 'Ascending'. A comment is entered: 'Snow Removal as requested by Agency'. The 'Send to Supplier' checkbox is checked and highlighted with a red box. The 'Associated Document' section shows an 'Attach' button, which is also highlighted with a red box.

35. Add **Line Comments** that are specific for the requisition line

36. Once you've entered the comments check the **Send to Supplier** checkbox

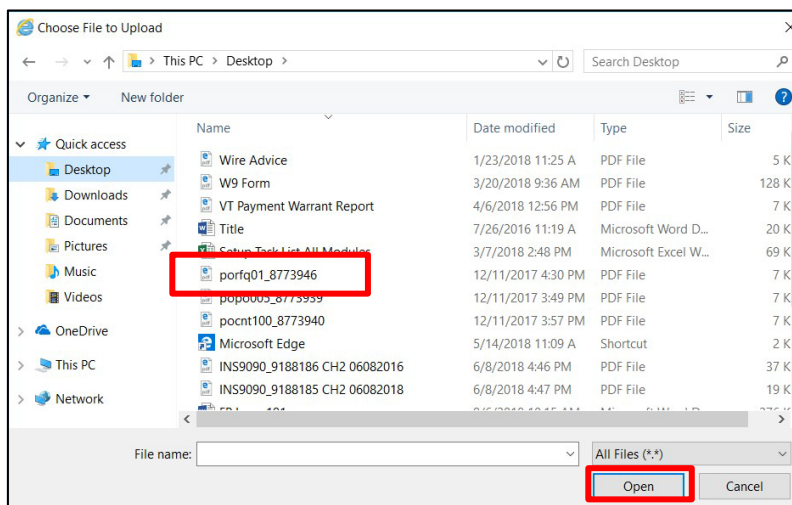
37. To add an attachment to the Requisition line, click **Attach**

A **File Attachment** window opens:

The screenshot shows the 'File Attachment' window. It has a title bar with a close button. Below the title bar, there is a 'Choose File' button highlighted with a red box, followed by the text 'No file chosen'. At the bottom, there are 'Upload' and 'Cancel' buttons.

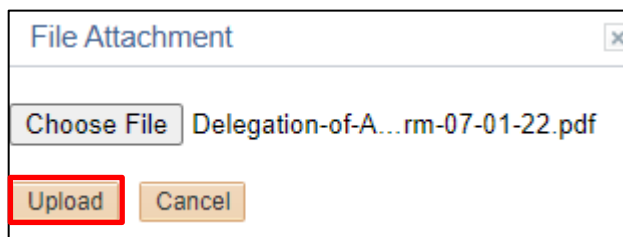
38. Click **Choose File** to search for files to choose to upload as an attachment. Note that you can select files on local or network drives that your computer has access to.

The **Choose File** window opens:



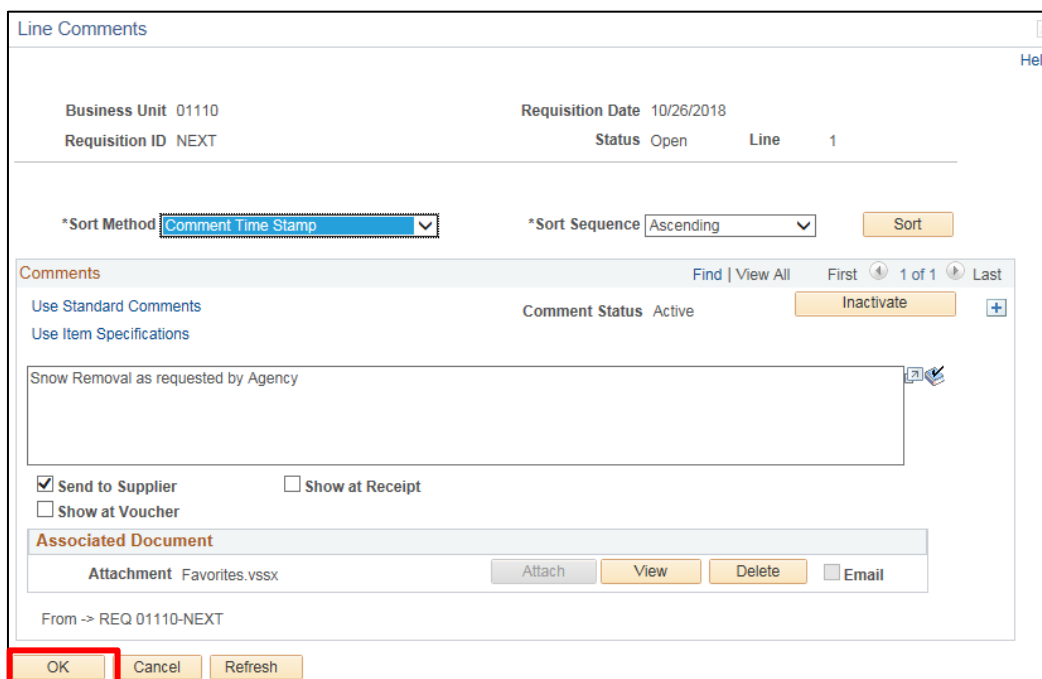
**39.** Select the file and click **Open**

You will be returned to the **File Attachment** window with the file name selected defaulted in:



**40.** Click **Upload** to upload your attachment to the Requisition

You are returned to the Line Comments page and the attachment is displayed in the Associated Document section:



**41.** Click **OK**

You are returned to the **Maintain Requisitions** page:

**Maintain Requisitions**

**Requisition**

Business Unit 01110 Status Open ☒  
Requisition ID NEXT Budget Status Not Chk'd ☐  
Requisition Name Amount Only Snow Removal Copy From ☐ Hold From Further Processing

**Header** ?

\*Requester TJARVIS Jarvis, Tanya  
\*Requisition Date 10/26/2018 Requisition Info  
Origin FM Finance & Management  
\*Currency Code USD Dollar  
Accounting Date 10/26/2018

Requisition Defaults **Edit Comments**  
Requisition Activities

**Amount Summary** ?

Total Amount 1,000.00 USD

**Add Items From** ?

Purchasing Kit Catalog  
Item Search Requisition Items

**Line** ?

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls Personalize Find View All 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Snow Removal	1.0000	EA	96172	1,000.0000	1,000.00	Open

View Printable Version \*Go to ...More...

**42. Add Comments** link changed to **Edit Comments**

**43. Line Comments** icon is no longer empty

**44. Click [Save](#)**

Follow specific controls within in your department for approval and budget checking.

**Entering a Requisition is Complete**

## Enter a Requisition with Split Funding

**Situations when this function is used:** Enter a requisition when you need to purchase an item that the STATE doesn't currently have a contract for, is not covered by a blanket delegation of authority (BDA), has a dollar value greater than \$3,500.00, and has more than 1 funding source.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays:



Your default BU will appear in the Business Unit field. The Req ID will default as NEXT.

1. Click **Add**

The **Maintain Requisitions** page displays:

Maintain Requisitions

Requisition

Business Unit 01105 Status Open  
Requisition ID NEXT Budget Status Not Chk'd  
Requisition Name Copy From Hold From Further Processing

Header

\*Requester ETEST Ella Test  
\*Requisition Date 12/02/2018 Requisition Info  
Origin DII Dept of Info & Innovation  
\*Currency Code USD Dollar  
Accounting Date 12/02/2018

Requisition Defaults Add Comments  
Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog  
Item Search Requisition Items

Line

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls Personalize Find View All First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Lasermate 20 Offline	Lasermate 20 Offline	1.0000	EA	70099	50.00	0.00	Open

View Printable Version \*Go to ...More...

2. **Requester** - If nothing defaults click the magnifying glass and select your name
3. **Requisition Date** - Will default in as current date. **DO NOT** change date
4. **Origin** - If your dept origin code doesn't default in click the **Magnifying Glass** to select it from a list
5. **Accounting Date** - Will default in with the current date. **DO NOT** change the Accounting Date
6. **Description** - Type in the description of item(s) or service(s) that are needed, it's important to be specific
7. **Quantity** - Enter the quantity needed
8. **Unit of Measure** - Enter a unit of measure for the item or service or click on the **Magnifying Glass** to select from a list of values
9. **Category** - Enter the 5-digit category the item or service most closely relates to or click on the **Magnifying Glass** and select from a list of values
10. **Enter Price** - Enter the price you expect to pay for the item or service
11. Click on the **+** to add a line

The following **Message** opens:

fintraining.erp.vermont.gov says

Enter number of rows to add:

1

OK Cancel

12. Enter the number of lines to add
13. Click **OK**

Line 2 is added:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Lasermate 20 Offline	1.0000	EA	70099	50.00000	50.00	Open
2			0.0000			0	0.00	Open

14. Enter description, Quantity, UOM, Category, Price the same way you entered line 1

The following warning Message opens:

Warning -- The item description entered : LASERMATE 20 OFFLINE BASE W/NESTER SERIAL #379 is on another Requisition Line. (10105,6)

The item descriptions that you have specified also appear on another requisition line. You can have two separate requisition lines using the same descriptions, but you may want to consolidate information for the two lines.

OK

15. Click OK

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Lasermate 20 Offline	1.0000	EA	70099	50.00000	50.00	Open
2		Lasermate 20 Offline	1.0000	EA	70099	50.00000	50.00	Open

16. Click on the **Schedule** icon for Line 1

The **Schedule** panel opens for Line 1:

Maintain Requisitions

**Schedule**

Business Unit 01105 Requisition Date 12/20/2018

Requisition ID NEXT Status Open

[Return to Main Page](#)

Line 1 Item Lasermate 20 Offline Quantity 1.0000 Each Merchandise Amt 50.00 USD

**Schedule**

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PDIIMT	1.0000	50.00000	50.00	01/20/2019	Ella Test	Active

17. **Ship To** - Enter ship to location

18. **Due Date** - Enter due date

19. Click on the **Distribution** icon for Line 1

The following **Message** opens:

Message

Price will be overridden by system calculated price when changing Ship To Location

A change to the ship to can result in a price change, a sales and use tax recalculation, or a VAT recalculation.

OK

20. Click **OK** and verify that price didn't change

The **Distribution** page displays:

Distribution Details

Maintain Requisitions

Distribution

Requisition ID NEXT Item Lasermate 20 Offline  
Line 1 Status Active  
Schedule 1

Ship To PDIIMTP001 Information Quantity 1.0000 EA  
\*Distribute By Quantity Open Quantity 1.0000  
Merchandise Amt 50.00 USD

SpeedChart Multi-SpeedCharts

Distributions

Personalize | Find | View All | First 1 of 1 Last

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1	Open	100.0000	1.0000	50.00	01105	522400						

+

21. **Distribute By** - Defaults in as **Quantity**

22. **Fund** - Enter Fund

23. **Dept ID** - Enter Dept ID

24. Click on the **+** button to add a row

The following **Message** opens:

fintraining.erp.vermont.gov says

Enter number of rows to add:

1

OK Cancel

25. Enter number of rows to add

26. Click **OK**

## Distribution for Line 2 opens:

Personalize | Find | View All | 1-2 of 2 | Last

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1	Open	50.0000	0.5000	25.00	01105	522400	58100	1105500056				
2	Open	50.0000	0.5000	25.00	01105	522400	58100	1105500100				

OK Cancel Refresh

27. On Distribution line 1 enter 50 in Percent field

28. Quantity and Amount of line decrease by 50%

29. On Distribution line 2 enter 50 in Percent field

30. **Account** - Enter account

31. **Fund** - Enter fund

32. **Dept ID** - Enter department ID

33. Click **OK**

You are returned to the **Schedule** page:

Maintain Requisitions

### Schedule

Business Unit 01105 Requisition Date 12/20/2018  
 Requisition ID NEXT Status Open  
[Return to Main Page](#)

Line Find **View All** First 1 of 2 Last

1	Item	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	Lasermate 20 Offline	1.0000	50.00000	50.00	01/20/2019	Ella Test	Active

**Schedule** Personalize | Find | View All | 1 of 1 | Last

**Details**

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PDIIMT	1.0000	50.00000	50.00	01/20/2019	Ella Test	Active

Add Ship To Comments

Save Notify Refresh Add Update/Display

34. Under Lines, click **View All**



You will now see the **Schedule** for all lines entered:

Maintain Requisitions

### Schedule

Business Unit 01105 Requisition Date 12/20/2018  
 Requisition ID NEXT Status Open  
[Return to Main Page](#)

Line 1 Find | View 1 First 1-2 of 2 Last

Item	Quantity	Merchandise Amt
Lasermate 20 Offline	1.0000 Each	50.00 USD

**Schedule** Personalize | Find | View All | First 1 of 1 Last

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PDIIMT	1.0000	50.00000	50.00	01/20/2019	Ella Test	Active

Line 2 Find | View All | First 1 of 1 Last

Item	Quantity	Merchandise Amt
Lasermate 20 Offline	1.0000 Each	50.00 USD

**Schedule** Personalize | Find | View All | First 1 of 1 Last

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1		1.0000	50.00000	50.00		Ella Test	Active

Add Ship To Comments

Save Notify Refresh Add Update/Display

**35. Ship To** - Enter Ship To location for Line 2

**36. Due Date** - Enter Due Date for Line 2

**37.** Click on **Distribution** icon for Line 2

The following warning **Message** opens:

Message

Price will be overridden by system calculated price when changing Ship To Location

A change to the ship to can result in a price change, a sales and use tax recalculation, or a VAT recalculation.

OK

**38.** Click **OK**

Distribution Details

Maintain Requisitions

### Distribution

Requisition ID NEXT Item Lasermate 20 Offline  
 Line 2 Status Active  
 Schedule 1

Ship To PDIIMT001 Information

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1	Open	100.0000	1.0000	50.00	01105	522400	59300	1105500200				

OK Cancel Refresh

**39. Distribute By** defaults in as **Quantity**

**40. Fund** - Enter fund

**41. Dept ID** - Enter department ID

**42.** Click **OK**

You are returned to the **Schedule** page:

Maintain Requisitions

### Schedule

Business Unit 01105 Requisition Date 12/20/2018  
Requisition ID NEXT Status Open

**Return to Main Page**

Line 2 Item Lasermate 20 Offline Quantity 1.0000 Each Merchandise Amt 50.00 USD

**Schedule** Personalize | Find | View All | First 2 of 2 Last

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PDIIMT	1.0000	50.00000	50.00	01/20/2019	Ella Test	Active

Add Ship To Comments

Save Notify Refresh Add Update/Display

43. Click the **Return to Main Page** link

Maintain Requisitions

### Requisition

Business Unit 01105 Status Approved  
Requisition ID 0000000068 Budget Status Valid  
Requisition Name 0000000068 ☐ Hold From Further Processing

▼ Header ?

\*Requester ETEST Ella Test  
\*Requisition Date 12/20/2018 Requester Info  
Origin DII Dept of Info & Innovation  
Currency Code USD Dollar  
Accounting Date 12/20/2018

Requisition Defaults Add Comments  
Requisition Activities  
Document Status

**Amount Summary** ?

Total Amount	100.00 USD
Pre-Encumbrance Balance	100.00 USD

44. Click the **Add Comments** link to add comments that relate to the Requisition as a whole

The **Header Comments** window opens:

Header Comments

Business Unit 01105 Requisition Date 12/20/2018  
Requisition ID 0000000068 Status Approved

☒ Retrieve Active Comments Only Retrieve  
\*Sort Method Comment Time Stamp \*Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last  
Use Standard Comments Comment Status Active Inactivate +

Deliver to the loading dock behind the building

☒ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher

Associated Document  
Attachment Attach View Delete Email

From -> REQ 01105-0000000068

OK Cancel Refresh

45. Enter comments. Be very specific about delivery requirements

46. Check the **Send to Supplier** checkbox

47. Click **OK**

Maintain Requisitions

Requisition

Business Unit 01105 Status Approved  
Requisition ID 0000000068 Budget Status Valid  
Requisition Name 0000000068 Hold From Further Processing

Header  
\*Requester ETEST Ella Test  
\*Requisition Date 12/20/2018 Requester Info  
Origin DII Dept of Info & Innovation  
Currency Code USD Dollar  
Accounting Date 12/20/2018

Requisition Defaults Edit Comments  
Requisition Activities  
Document Status

Amount Summary  
Total Amount 100.00 USD  
Pre-Encumbrance Balance 100.00 USD

Select Lines To Display  
Search for Lines  
Line To Retrieve

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status	
1		Lasermate 20 Offline	1.0000	EA	70099	50.00000	50.00	Approved	
2		Lasermate 20 Offline	1.0000	EA	70099	50.00000	50.00	Approved	

View Printable Version \*Go to ...More...

Save Return to Search Notify Refresh Add Update/Display

48. Click the **Line Comments** icon for specific information about the line item(s).

The **Line Comments** page displays:

Line Comments

Business Unit 01105 Requisition Date 12/20/2018  
 Requisition ID 0000000068 Status Approved Line 1

☒ Retrieve Active Comments Only [Retrieve](#)

\*Sort Method  \*Sort Sequence  [Sort](#)

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active [Inactivate](#) [+](#)

Use Item Specifications

Call for appointment before delivering

☒ Send to Supplier ☐ Show at Receipt  
☐ Show at Voucher

Associated Document

Attachment [Attach](#) [View](#) [Delete](#) ☐ Email

From -> REQ 01105-0000000068

[OK](#) [Cancel](#) [Refresh](#)

49. Enter needed comments

50. Check the Send to Supplier checkbox

51. Click **OK**

Maintain Requisitions

Requisition

Business Unit 01105 Status Approved [△](#) [×](#)  
 Requisition ID 0000000068 Budget Status Valid  
 Requisition Name 0000000068 ☐ Hold From Further Processing

▼ Header ?

\*Requester ETEST Ella Test  
 \*Requisition Date 12/20/2018 Requisition Info  
 Origin DII Dept of Info & Innovation  
 Currency Code USD Dollar  
 Accounting Date 12/20/2018

Requisition Defaults [Edit Comments](#)  
 Requisition Activities  
 Document Status

Amount Summary ?

Total Amount 100.00 USD  
 Pre-Encumbrance Balance 100.00 USD

Select Lines To Display ?

Add Items From ?

Purchasing Kit Catalog  
 Item Search Requester Items

Search for Lines  
 Line  To  [Retrieve](#)

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Lasermate 20 Offline	1.0000	EA	70099	50.00000	50.00	Approved	<a href="#">Line Comments</a>	
2	Lasermate 20 Offline	1.0000	EA	70099	50.00000	50.00	Approved	<a href="#">Line Comments</a>	

You'll notice the **Add Comments** link changed to **Edit Comments** and the **Line Comments** icon is no longer empty.

52. Click **Save**

The Requisition has now been saved and assigned a requisition number:

Maintain Requisitions

Requisition

Business Unit 01105  
 Requisition ID 0000000068  
 Requisition Name 0000000068

Status Open  
 Budget Status Not Chk'd

Hold From Further Processing

Header

\*Requester ETEST  
 \*Requisition Date 12/20/2018  
 Origin DII  
 \*Currency Code USD  
 Accounting Date 12/20/2018

Requester Info  
 Dept of Info & Innovation  
 Dollar

Requisition Defaults  
 Requisition Activities  
 Document Status

Add Comments

Amount Summary

Total Amount 100.00 USD

Add Items From

Purchasing Kit  
 Item Search

Catalog  
 Requester Items

Select Lines To Display

Search for Lines  
 Line To Retrieve

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Lasermate 20 Offline	1,0000	EA	70099	50.00000	50.00	Open
2		Lasermate 20 Offline	1,0000	EA	70099	50.00000	50.00	Open

View Printable Version

\*Go to ...More...

Save Return to Search Notify Refresh Add Update/Display

The requisition now needs to be approved and budget checked. Follow your department procedure for the approval process.

Once the Requisition has the Status of **Approved**, you may budget check.

Maintain Requisitions

Requisition

Business Unit 01105  
 Requisition ID 0000000068  
 Requisition Name 0000000068

Status Approved  
 Budget Status Not Chk'd

Hold From Further Processing

Header

53. Click on the **Budget Check** icon

Once the Requisition is approved and budget checked it will show **Status = Approved** and **Budget Status = Valid**:

Maintain Requisitions

Requisition

Business Unit 01105  
 Requisition ID 0000000068  
 Requisition Name 0000000068

Status Approved  
 Budget Status Valid

Hold From Further Processing

54. Click **Save**

Follow specific controls within your department for approval and budget checking.

### Entering a Requisition with Split Funding is Complete


## Amount Only Requisition Line

**Situations when this function is used:** Enter a requisition when you need to purchase an item or service that the STATE doesn't currently have a contract for, is not covered by a blanket delegation of authority (BDA) and has a dollar value greater than \$3,500.00.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays:



Requisitions

Add a New Value

\*Business Unit 01110

\*Requisition ID NEXT

Add

Find an Existing Value

1. **Business Unit** - Your default BU will appear in the Business Unit field
2. **Requisition ID** - Defaults as NEXT
3. Click **Add**

The **Maintain Requisitions** page displays:

In the **Header** section:

The screenshot shows the 'Maintain Requisitions' page. The 'Requisition' section is highlighted. The 'Header' section is expanded, showing the following fields: 'Requisition Name' (with a 'Copy From' button), '\*Requester' (with a magnifying glass icon), '\*Requisition Date' (11/29/2018, with a calendar icon), 'Origin' (with a magnifying glass icon), '\*Currency Code' (USD, with a dropdown arrow), and 'Accounting Date' (11/29/2018, with a calendar icon). A red box highlights these fields. Other visible fields include 'Business Unit' (01110), 'Status' (Open, with a checkmark icon), 'Budget Status' (Not Chk'd), and a checkbox for 'Hold From Further Processing'. At the bottom, there is an 'Amount Summary' section showing 'Total Amount' as '0.00 USD'. Navigation links like 'Requisition Defaults', 'Add Comments', and 'Requisition Activities' are also visible.

4. **Requisition Name** - If nothing is entered, the Requisition ID will populate this field
5. **Requester** - If nothing defaults click the **Magnifying Glass** and select your name
6. **Requisition Date** - Defaults in as current date. **DO NOT** change date
7. **Origin** - if your dept. origin code doesn't default in click the **Magnifying Glass** to select it from a list
8. **Accounting Date** - Defaults in with the current date. **DO NOT** change the Accounting Date



Add Items From ?

Purchasing Kit Catalog  
Item Search Requester Items

Line ? Personalize | Find | View All | First 1 of 1 Last

Details Ship To/Due Date Status Supplier Information Item Information **Attributes** Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Snow Removal	0.0000	EA	96172	1,000.0000	0.00	Open

View Printable Version \*Go to ...More...

Save Notify Refresh Add

**9. Description** - Type in the description of item(s) or service(s) that are needed, it's important to be specific

**10. Unit of Measure** - Enter a unit of measure for the item or service or click on the **Magnifying Glass** to select from a list of values

**11. Category** - Enter the 5-digit category the item or service most closely relates to or click on the **Magnifying Glass** and select from a list of values

**12. Enter Price** - Enter the price you expect to pay for the item or service

**13. Click the **Attributes** tab in the Line section**

Add Items From ?

Purchasing Kit Catalog  
Item Search Requester Items

Line ? Personalize | Find | View All | First 1 of 1 Last

Details Ship To/Due Date Status Supplier Information Item Information **Attributes** Contract Sourcing Controls

Line	Item	Description	Buyer	Name	Physical Nature	Zero Price Indicator	Amount Only	Inspection Required	Inspect ID
1		Snow Removal			Goods	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

View Printable Version \*Go to ...More...

Save Notify Refresh Add

**14. Indicate the Requisition Line is amount only by checking the **Amount Only** checkbox**

**15. Click the **Details** Tab in the Line section**

The following Message opens:

Message

The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238)

The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you.

Yes No

**16. Click **Yes****



**17.** The Quantity field for an Amount Only Requisition Line is set to 1, and not available to be edited

**18.** Edit the Price field to increase or decrease the dollar amount of the Requisition Line

**19.** Once all lines have been entered click on the **Schedule** icon

**20. Ship To Location** - Enter the ship to location, the following format exists in Purchasing for Ship To locations:

- P = Purchasing
- FM = Origin Code for the Agency/Department
- MTP = Abbreviation for city/town
- 001 = First location for that origin code in the city/town

**21. Due Date** - Enter a due date, if you need the item sooner than 45 days, BGS Office of Purchasing & Contracting requests you please make note in the Comments section of the Requisition

**22.** Click the **Distribution** icon

Maintain Requisitions

**Distribution**

Requisition ID NEXT      Item Snow Removal  
 Line 1      Status Active  
 Schedule 1  
 Ship To PAOTBAR001      Quantity 1.0000 EA  
 \*Distribute By Amount      Open Amount 1,000.000  
 Merchandise Amt 1,000.00 USD

SpeedChart  Multi-SpeedCharts

**Distributions** Personalize | Find | View All | First 1 of 1 Last

Distrib	Status	Percent	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1	Open	100.0000	1,000.00	01110	510300						

OK Cancel Refresh

23. Enter the appropriate **chartfield data** for your department

24. Click **OK**

You are returned to the **Schedule** page:

Maintain Requisitions

**Schedule**

Business Unit 01110      Requisition Date 10/26/2018  
 Requisition ID NEXT      Status Open  
[Return to Main Page](#)

**Line** Find | View All | First 1 of 1 Last

Line	Item	Quantity	Merchandise Amt
1	Snow Removal	1.0000 Each	1,000.00 USD

**Schedule** Personalize | Find | View All | First 1 of 1 Last

**Details**

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PAOTB	1.0000	1,000.00000	1,000.00	11/15/2018	Jarvis, Tanya	Active

Add Ship To Comments

Save Notify Refresh

Add Update/Display

25. Click **Save**

The requisition has now been saved and assigned a requisition number. You can add further Comments or Attachments to the Requisition as needed.

Follow specific controls within in your department for approval and budget checking.

### Amount Only Requisition Line is Complete

## Copy an Existing Requisition

**Situations when this function is used:** If you have previously entered a requisition for the same product it may be easier and faster to copy the requisition.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays:

The screenshot shows the 'Requisitions' page header. Below the header is a section titled 'Add a New Value'. In the top right corner of this section is a button labeled 'Find an Existing Value'. Below this, there are two input fields: '\*Business Unit' with the value '01110' and a search icon, and '\*Requisition ID' with the value 'NEXT'. Below these fields is a red-bordered button labeled 'Add'.

Your default BU will appear in the Business Unit field. The Req ID will default as NEXT.

1. Click **Add**

The **Maintain Requisitions** page displays:

The screenshot shows the 'Maintain Requisitions' page. The 'Requisition' section contains the following fields and buttons: 'Business Unit' (01105), 'Requisition ID' (NEXT), 'Requisition Name' (empty), 'Status' (Open), 'Budget Status' (Not Chk'd), and a 'Copy From' button. Below these fields is a 'Header' section with a dropdown arrow and a question mark. The 'Header' section contains the following fields and buttons: '\*Requester' (ETEST), '\*Requisition Date' (12/02/2018), 'Origin' (empty), '\*Currency Code' (USD), 'Accounting Date' (12/02/2018), 'Requester Info', 'Requisition Defaults', 'Add Comments', 'Amount Summary', 'Total Amount' (0.00 USD), and 'Add Items From'. Below the 'Header' section are two buttons: 'Purchasing Kit' and 'Catalog'. At the bottom are two buttons: 'Item Search' and 'Requester Items'.

2. Click on the **Copy From** link

The **Copy Requisition** page displays:

Req Inquiry Selection

Maintain Requisitions

### Copy Requisition

**Header**

Business Unit 01105

Requisition ID

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID STATE

Supplier ID  [Supplier Details](#)

Item SetID STATE

Item Description

Department

Origin

To

Supplier Name

Item ID

☐ Direct Ship

254 characters remaining

**Search**

**Requisition** Personalize | Find | View All | First 1 of 1 Last

Sel	Req ID	Requisition Name	Status	Origin	Requester
<input type="checkbox"/>					

OK Cancel Refresh

3. Enter the Requisition ID that you want to copy or click on the **Magnifying Glass** to the right of the Requisition ID field to select from the list of values.

4. Click **Search**

Select a Requisition by clicking on the Requisition ID Link

Req Inquiry Selection

Maintain Requisitions

### Copy Requisition

**Header**

Business Unit 01105

Requisition ID 0000000066

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID STATE

Supplier ID  [Supplier Details](#)

Item SetID STATE

Item Description

Department

Origin

To

Supplier Name

Item ID

☐ Direct Ship

254 characters remaining

**Search**

**Requisition** Personalize | Find | View All | First 1 of 1 Last

Sel	Req ID	Requisition Name	Status	Origin	Requester
<input checked="" type="checkbox"/>	0000000066	0000000066	Approved	DII	ETEST

OK Cancel Refresh

5. Click **OK**

If the Requisition you are copying from contains a different requester name you will receive the following Message:

The source requester (TJARVIS) is different from the target requester (), copy? (10150,186)

All copied defaults will remain unchanged. Do you want to copy?

Yes
No

6. Click **Yes** if you still want to copy

The **Maintain Requisitions** page displays:

Maintain Requisitions

---

Requisition

Business Unit 01105

Requisition ID NEXT

Requisition Name  Copy From

Status Open

Budget Status Not Chk'd

☐ Hold From Further Processing

▼ Header ?

\*Requester ETEST  Ella Test

\*Requisition Date 12/02/2018  Requester Info

Origin DII  Dept of Info & Innovation

\*Currency Code USD  Dollar

Accounting Date 12/02/2018

Requisition Defaults

Requisition Activities

Add Comments

Amount Summary ?

Total Amount 50.00 USD

Add Items From ?

Purchasing Kit

Catalog

Item Search Requester Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	Lasermate 20 Offline~	1.0000	EA	70099	50.00000	50.00	Open

Req & Accounting Date default in as current date. All other information on lines, schedule, and distribution pages defaults in exactly as it was entered in the original requisition. **\*\*It is important to review the Schedule, Distribution, and both Header & Line Comments pages to be sure all data is accurate for this Req.\*\***

7. Click **Save**

The requisition has now been saved and assigned a requisition number:

Maintain Requisitions

---

Requisition

Business Unit 01105

Requisition ID 000000067

Requisition Name 000000067

Status Open

Budget Status Not Chk'd

☐ Hold From Further Processing

▼ Header ?

\*Requester ETEST  Ella Test

\*Requisition Date 12/02/2018  Requester Info

Origin DII  Dept of Info & Innovation

\*Currency Code USD  Dollar

Accounting Date 12/02/2018

Follow specific controls within your department for approval and budget checking procedures.

### Copying a Requisition is Complete

## Approve a Requisition

**Situations when this function is used:** All requisitions must be approved and budget checked in order for the Office of Purchasing & Contracting to pick them up. Approving a requisition verifies the requisition is needed, all information is accurate, and authorizes Purchasing and Contract Administration to move forward with procuring the product.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays, click on the **Find an Existing Value** button:

**Requisitions**

**Find an Existing Value** ➕ Add a New Value

▼ **Search Criteria**  
Use the following search to look for an existing Requisition.

Recent Searches Choose from recent searches ✎ Saved Searches Choose from saved searches ✎

\*Business Unit ▾ 01105 🔍  
Requisition ID ▾ begins with 0000000067 🔍  
Requisition Name ▾ begins with 🔍  
Requisition Status ▾ ▾  
Origin ▾ begins with 🔍  
Requester ▾ begins with 🔍  
Requester Name ▾ begins with 🔍  
Hold From Further Processing ☐  
[^ Show fewer options](#)  
☐ Case Sensitive  
Search Clear

1. **Business Unit** - Accept your default BU or enter a valid BU
2. **Requisition ID** - Enter a requisition ID number
3. Click **Search**

The **Maintain Requisitions** page displays:

**Maintain Requisitions**

**Requisition**

Business Unit 01105  
Requisition ID 0000000067  
Requisition Name 0000000067

Status Open 🔍 ✖  
Budget Status Not Chk'd  
☐ Hold From Further Processing

▼ **Header** ?

\*Requester ETEST 🔍 Ella Test  
\*Requisition Date 12/02/2018 📅 Requisition Info  
Origin DII 🔍 Dept of Info & Innovation  
\*Currency Code USD 🔍 Dollar  
Accounting Date 12/02/2018 📅

Requisition Defaults + Add Comments  
Requisition Activities  
Document Status

**Amount Summary** ?

Total Amount 50.00 USD

**Select Lines To Display** ?

Search for Lines  
Line 🔍 To 🔍 Retrieve

**Line** ?

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls Personalize Find View All 🔍 📄 First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Lasermate 20 Offline-	1.0000	EA	70099	50.00000	50.00	Open



4. Review requisition information for accuracy and click the **Approve** icon

Status is now **Approved**:


Maintain Requisitions





**Requisition**

Business Unit 01105  
Requisition ID 0000000067  
Requisition Name 0000000067


Status **Approved**   
Budget Status Not Chkd 

☐ Hold From Further Processing


**Header** 

\*Requester ETEST  Ella Test  
\*Requisition Date 12/02/2018  [Requester Info](#)  
Origin DII  Dept of Info & Innovation  
\*Currency Code USD Dollar  
Accounting Date 12/02/2018 


[Requisition Defaults](#) [Add Comments](#)  
[Requisition Activities](#)  
[Document Status](#)



**Amount Summary** 

Total Amount 50.00 USD

**Add Items From** 

[Purchasing Kit](#) [Catalog](#)  
[Item Search](#) [Requester Items](#)

**Select Lines To Display** 

Search for Lines  
Line   To   [Retrieve](#)

5. Click **Save**

**Approving a Requisition is Complete**



## Budget Check a Requisition

**Situations when this function is used:** All requisitions must be approved and budget checked in order for the Office of Purchasing & Contracting to pick them up. Successful budget checking will pre-encumber the funds in your budget.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The Requisitions page displays, click on the **Find an Existing Value** button:

**Requisitions**

**Find an Existing Value** ➕ Add a New Value

▼ **Search Criteria**  
Use the following search to look for an existing Requisition.

🕒 Recent Searches  ✎ 🔖 Saved Searches  ✎

\*Business Unit  🔍

Requisition ID  🔍

Requisition Name  🔍

Requisition Status  🔍

Origin  🔍

Requester  🔍

Requester Name  🔍

Hold From Further Processing ☐

^ Show fewer options

☐ Case Sensitive

Search Clear

1. **Business Unit** - Accept your default BU or enter a valid BU
2. **Requisition ID** - Enter a requisition ID number
3. Click **Search**

The **Maintain Requisitions** page displays:

**Maintain Requisitions**

**Requisition**

Business Unit 01105 Status Approved

Requisition ID 0000000067 Budget Status Not Chk'd 🔍✖

Requisition Name 0000000067 ☐ Hold From Further Processing

▼ **Header** ?

\*Requester ETEST 🔍 Ella Test

\*Requisition Date 12/02/2018 📅 Requester Info

Origin DII 🔍 Dept of Info & Innovation

\*Currency Code USD 🔍 Dollar

Accounting Date 12/02/2018 📅

Requisition Defaults Add Comments Amount Summary ?

Requisition Activities Document Status

Total Amount 50.00 USD

4. Click the **Budget Check** icon



## Budget Status is now Valid:



Maintain Requisitions

Requisition

Business Unit 01105

Requisition ID 0000000067

Requisition Name 0000000067

Status Approved  

**Budget Status Valid**

☐ Hold From Further Processing

▼ Header ?

\*Requester ETEST Ella Test

\*Requisition Date 12/02/2018 [Requester Info](#)

Origin DII Dept of Info & Innovation

Currency Code USD Dollar

Accounting Date 12/02/2018

## Budget Checking a Requisition is Complete

## Cancel a Requisition

**Situations when this function is used:** If it is decided after entering the requisition that it is not needed the requisition can be canceled. A requisition may also need to be canceled if the Office of Purchasing & Contracting decides to create a contract for the product being purchased instead of a purchase order.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays, click on the **Find an Existing Value** button:

**Requisitions**

**Find an Existing Value** ➕ Add a New Value

▼ **Search Criteria**  
Use the following search to look for an existing Requisition.

Recent Searches Choose from recent searches ✎ Saved Searches Choose from saved searches ✎

\*Business Unit = 01105 🔍

Requisition ID begins with 0000000067 🔍

Requisition Name begins with  🔍

Requisition Status =  🔍

Origin begins with  🔍

Requester begins with  🔍

Requester Name begins with  🔍

Hold From Further Processing ☐

[Show fewer options](#)

☐ Case Sensitive

Search Clear

1. **Business Unit** - Accept your default BU or enter a valid BU
2. **Requisition ID** - Enter a requisition ID number
3. Click **Search**

The **Maintain Requisitions** page displays:

**Maintain Requisitions**

**Requisition**

Business Unit 01105 Status Approved ⚠️

Requisition ID 0000000067 Budget Status Valid

Requisition Name 0000000067 ☐ Hold From Further Processing

▼ **Header** ?

\*Requester ETEST Ella Test

\*Requisition Date 12/02/2018 Requester Info

Origin DII Dept of Info & Innovation

Currency Code USD Dollar

Accounting Date 12/02/2018

[Requisition Defaults](#) [Add Comments](#)

[Requisition Activities](#)

[Document Status](#)

**Amount Summary** ?

Total Amount	50.00 USD
Pre-Encumbrance Balance	50.00 USD

4. Click the red **X** next to Status

The following warning **Message** opens:

**Message**

Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)

When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

5. Click **Yes**

Return to the **Requisitions - Find an Existing Value** page:

**Requisitions**

**Find an Existing Value**

▼ **Search Criteria**  
Use the following search to look for an existing Requisition.

Recent Searches   Saved Searches

**\*Business Unit** [=]

**Requisition ID** [begins with]

**Requisition Name** [begins with]

**Requisition Status** [=]

**Origin** [begins with]

**Requester** [begins with]

**Requester Name** [begins with]

**Hold From Further Processing** ☐

^ Show fewer options

☐ Case Sensitive

6. **Business Unit** - Enter your BU

7. **Requisition ID** - Enter the requisition ID for the just-deleted requisition

8. Click **Search**

The message **No matching values were found** will be returned:

The screenshot shows the 'Requisitions' search interface. At the top, there's a 'Find an Existing Value' section with an 'Add a New Value' button. Below this is the 'Search Criteria' section, which includes a dropdown for 'Recent Searches' and a dropdown for 'Saved Searches'. The main search area contains several fields: '\*Business Unit' (set to '01105'), 'Requisition ID' (set to '0000000067'), 'Requisition Name' (set to 'begins with'), 'Requisition Status' (set to '='), 'Origin' (set to 'begins with'), 'Requester' (set to 'begins with'), and 'Requester Name' (set to 'begins with'). There are also checkboxes for 'Hold From Further Processing' and 'Case Sensitive'. At the bottom of the search area are 'Search', 'Clear', and 'Save Search' buttons. Below the search area is a 'Search Results' section, which is highlighted with a green box and contains the message 'No matching values were found.'

The requisition will need to be budget checked to liquidate the pre-encumbrance on the budget. Please follow instructions in this manual on [Batch Budget Checking](#) to liquidate the pre-encumbrance.

**Note:** The requisition will need to be moved to Complete status. Follow the exercise in this manual titled [Reconcile a Requisition](#) to move the Requisition to complete status.

### Canceling a Requisition is Complete

## Create a Change Order for a Requisition

### (Line - Schedule - Distribution)

**Situations when this function is used:** A requisition must be Approved and have a Valid Budget Status for the Change Order icon to be available - the Office of Purchasing & Contracting runs a query to pick up requisitions that are ready to be processed daily - if you make a change to a requisition after 1 day has passed be sure to contact the Office of Purchasing & Contracting at 828-2211 to discuss the change.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Requisitions' page with the 'Find an Existing Value' section. The search criteria are as follows:

- \*Business Unit: = 01105
- Requisition ID: begins with 0000000066
- Requisition Name: begins with
- Requisition Status: =
- Origin: begins with
- Requester: begins with
- Requester Name: begins with
- Hold From Further Processing: ☐
- Case Sensitive: ☐


The 'Search' button is highlighted with a red box.

1. **Business Unit** - Accept your default BU or enter a valid BU
2. **Requisition ID** - Enter a requisition ID number
3. Click **Search**

The **Maintain Requisitions** page displays:

Maintain Requisitions

Requisition

Business Unit 01105 Status Approved 

Requisition ID 0000000066 Track Batch 3 Budget Status Valid

Requisition Name 0000000066 ☐ Hold From Further Processing

**Header**

\*Requester ETEST Ella Test  
\*Requisition Date 12/03/2018 Requisition Info  
Origin DII Dept of Info & Innovation  
Currency Code USD Dollar  
Accounting Date 12/03/2018

Requisition Defaults Add Comments  
Requisition Activities  
Document Status

**Amount Summary**

Total Amount 100.00 USD  
Pre-Encumbrance Balance 0.00 USD

**Add Items From**

Purchasing Kit Catalog  
Item Search Requisition Items

**Select Lines To Display**

Search for Lines  
Line  To  Retrieve

**Line**

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls Personalize Find View All First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1		Lasermate 20 Offline-Base W/Nester Serial #379	2.0000	EA	70099	50.00000	100.00	Approved				

View Printable Version \*Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

4. Click on the **Create Header Change** icon
5. Make the necessary line changes
6. **Accounting Date** - Change to the current date
7. Click **Save**

The following warning **Message** will open:

Message

This action will create a change order. Continue? (10200,27)

The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.

**Yes** No


8. Click **Yes**

Under the **Details for Line 1** section:

Details for Line 1

Requisition ID 0000000066      Item Lasermate 20 Offline-Base W/Ne

Line 1

Buyer LWORTMAN      Line Status Approved 

**Line Details**

Buyer Name Linda T Wortman      Buyer Information View Hierarchy

Category Code 70099

Description PRINTING EQUIP. NOT OTHERWISE

Transaction Item Description  
Lasermate 20 Offline-Base W/Nester Serial #379

Preferred Language Item Description

Expand All      Collapse All

▶ Supplier Information ?

▶ Item Information ?

▶ Attributes ?

▶ Contract ?

▶ Sourcing Controls ?

OK      Cancel      Refresh

9. Click on the **Create Line Change** icon

The **Transaction Item Description** field opens so changes can be made:

Details for Line 1

Requisition ID 0000000066      Item Lasermate 20 Offline-Base W/Ne

Line 1

Buyer LWORTMAN      Line Status Approved

**Line Details**

Buyer Name Linda T Wortman      Buyer Information View Hierarchy

Category Code 70099

Description PRINTING EQUIP. NOT OTHERWISE

\*Transaction Item Description  
Lasermate 20 Offline-Base W/Nester Serial #379

208 characters remaining

Preferred Language Item Description

10. Click **OK** after all changes have been made

To make a change to the **Description** portion of the Requisition:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	Lasermate 20 Offline-Base W/Nester Serial #379	5.0000	EA	70099	50.00000	250.00	Approved					


11. Click on the **Line Details** icon

The **Details Line 1** window opens:

Details for Line 1

Requisition ID 0000000066      Item Lasermate 20 Offline-Base W/Ne

Line 1

Buyer LWORTMAN      Line Status Approved 

**Line Details**

Buyer Name Linda T Wortman	Buyer Information	<b>Amount Summary</b>	
Category Code 70099	View Hierarchy	Merchandise Amt	250.00 USD
Description PRINTING EQUIP. NOT OTHERWISE		Document Base Amount	250.00 USD

Transaction Item Description

Lasermate 20 Offline-Base W/Nester Serial #379

Preferred Language Item Description

Expand All      Collapse All

▶ **Supplier Information** ?

▶ **Item Information** ?

▶ **Attributes** ?

▶ **Contract** ?

▶ **Sourcing Controls** ?

OK      Cancel      Refresh

12. Click on the **Create Line Change** icon

The **Transaction Item Description** field opens so changes can be made.

13. Save the Requisition

Follow specific controls within your department for budget checking.

**Create a Change Order to a Requisition Line is Complete**



## Create a Change Order to a Requisition - Schedule

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays, click on the **Find an Existing Value** tab:

**Requisitions**

**Find an Existing Value** + Add a New Value

**Search Criteria**

Use the following search to look for an existing Requisition.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

\*Business Unit = 01105 Q

Requisition ID begins with 0000000066 Q

Requisition Name begins with  Q

Requisition Status =  Q

Origin begins with  Q

Requester begins with  Q

Requester Name begins with  Q

Hold From Further Processing ☐

[Show fewer options](#)

☐ Case Sensitive

Search Clear Save Search

1. **Business Unit** - Accept your default BU or enter a valid BU
2. **Requisition ID** - Enter a requisition ID number
3. Click **Search**

The **Maintain Requisitions** page displays:

**Maintain Requisitions**

**Requisition**

Business Unit 01105 Status Approved ⚠

Requisition ID 0000000066 Track Batch 1 Budget Status Valid

Requisition Name 0000000066 ☐ Hold From Further Processing

**Header**

\*Requester ETEST Ella Test

\*Requisition Date 12/03/2018 Requisition Info

Origin DII Dept of Info & Innovation

Currency Code USD Dollar

Accounting Date 12/03/2018

Requisition Defaults Add Comments

Requisition Activities

Document Status

**Amount Summary**

Total Amount 250.00 USD

Pre-Encumbrance Balance 250.00 USD

**Select Lines To Display**

Search for Lines

Line  To  Retrieve

**Line**

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Lasermate 20 Offline-Base W/Nester Serial #379	5.0000	EA	70099	50.00000	250.00	Approved

4. Click on the **Create Header Change** icon and follow the [previous example](#)
5. Or you can go directly to the **Schedule** page

The **Schedule** page displays:

Maintain Requisitions

### Schedule

Business Unit 01105 Requisition Date 12/03/2018  
 Requisition ID 0000000066 Status Approved  
[Return to Main Page](#)

Line	Item	Lasermate 20 Offline-Base W/Ne	Quantity	5.0000 Each	Merchandise Amt	250.00 USD	
<div> <a href="#">Schedule</a> <a href="#">Personalize</a> <a href="#">Find</a> <a href="#">View All</a> <a href="#">First</a> <a href="#">1 of 1</a> <a href="#">Last</a> </div>							
<div> <a href="#">Details</a> </div>							
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PDIIMTP001	5.0000	50.00000	250.00	12/28/2018	Ella Test	Active

[Add Ship To Comments](#)

[Save](#)
[Return to Search](#)
[Notify](#)
[Refresh](#)
[Add](#)
[Update/Display](#)

6. Click the **Create Schedule Change** icon

7. Click **Save** after making all changes

The header **Requisition** page will return to your screen – notice the **Track Batch** is now **2**:

Maintain Requisitions

### Requisition

Business Unit 01105 Status Approved [Create Schedule Change](#)  
 Requisition ID 0000000066 **Track Batch 2** Budget Status Not Chk'd [Requester Info](#)  
 Requisition Name 0000000066 ☐ Hold From Further Processing

▼ Header ?

\*Requester ETEST Ella Test  
 \*Requisition Date 12/03/2018 Requester Info  
 Origin DII Dept of Info & Innovation  
 Currency Code USD Dollar  
 Accounting Date 12/03/2018

**Create a Change Order to a Requisition Schedule is Complete**

## Create a Change to a Requisition – Distribution

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Add/Update Requisitions

**Navigator Menu navigation:** Purchasing > Requisitions > Add/Update Requisitions

The **Requisitions** page displays, click on the **Find an Existing Value** button:

**Requisitions**

**Find an Existing Value** + Add a New Value

▼ **Search Criteria**  
Use the following search to look for an existing Requisition.

Recent Searches Choose from recent searches ✎ Saved Searches Choose from saved searches ✎

\*Business Unit = 01105 🔍

Requisition ID begins with 0000000066 🔍

Requisition Name begins with  🔍

Requisition Status =  🔍

Origin begins with  🔍

Requester begins with  🔍

Requester Name begins with  🔍

Hold From Further Processing ☐

^ Show fewer options

☐ Case Sensitive

Search Clear Save Search

1. **Business Unit** - Accept your default BU or enter a valid BU
2. **Requisition ID** - Enter a requisition ID number
3. Click **Search**

The **Maintain Requisitions** page displays:

**Maintain Requisitions**

**Requisition**

Business Unit 01105 Status Approved ⚙️

Requisition ID 0000000066 Track Batch 2 Budget Status Valid

Requisition Name 0000000066 ☐ Hold From Further Processing

▼ **Header** ?

\*Requester ETEST Ella Test

\*Requisition Date 12/03/2018 Requester Info

Origin DII Dept of Info & Innovation

Currency Code USD Dollar

Accounting Date 12/03/2018

Requisition Defaults Add Comments

Requisition Activities

Document Status

**Amount Summary** ?

Total Amount 100.00 USD

Pre-Encumbrance Balance 100.00 USD

**Add Items From** ?

Purchasing Kit Catalog

Item Search Requester Items

**Select Lines To Display** ?

Search for Lines

Line 🔍 To 🔍 Retrieve

**Line** ?

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls Personalize Find View All 🔍 First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1		Lasermate 20 Offline-Base W/Nester Serial #379	2.0000	EA	70099	50.00000	100.00	Approved			<span>🔍</span>

4. Click on the **Create Header Change** icon
5. Click on the **Schedule** icon

The **Schedule** page displays:

Maintain Requisitions

### Schedule

Business Unit 01105 Requisition Date 12/03/2018  
Requisition ID 0000000066 Status Approved  
[Return to Main Page](#)

Line 1 Item Lasermate 20 Offline-Base W/Ne Quantity 2.0000 Each Merchandise Amt 100.00 USD

**Schedule** Personalize | Find | View All | First 1 of 1 Last

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PDIIMTP001	2.0000	50.00000	100.00	12/28/2018	Ella Test	Active

6. Click on the **Distribution** icon

The **Distribution** page displays:

Distribution Details

Maintain Requisitions

### Distribution

Requisition ID 0000000066 Item Lasermate 20 Offline-Base W/Ne  
Line 1 Status Active  
Schedule 1  
Ship To PDIIMTP001 Information Quantity 2.0000 EA  
\*Distribute By Quantity Open Quantity 2.0000  
Merchandise Amt 100.00 USD  
SpeedChart Multi-SpeedCharts

**Distributions** Personalize | Find | View All | First 1 of 1 Last

Chartfields Details Asset Information Budget Information

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1	Open	100.0000	2.0000	100.00	01105	522400	58100	1105500056				

OK Cancel Refresh

7. Make necessary chartfield changes

8. Click **OK**

You are returned to the **Schedule** page:

Maintain Requisitions

### Schedule

Business Unit 01105 Requisition Date 12/03/2018  
Requisition ID 0000000066 Status Approved  
[Return to Main Page](#)

Line 1 Item Lasermate 20 Offline-Base W/Ne Quantity 2.0000 Each Merchandise Amt 100.00 USD

**Schedule** Personalize | Find | View All | First 1 of 1 Last

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	PDIIMTP001	2.0000	50.00000	100.00	12/28/2018	Ella Test	Active

Add Ship To Comments


Save Return to Search Notify Refresh Add Update/Display


9. Click **Save**

The **Maintain Requisitions** page displays:

Maintain Requisitions

Requisition

Business Unit 01105      Status: Approved      

Requisition ID 0000000066      Track Batch 2      **Budget Status** Not Chk'd      

Requisition Name 0000000066      ☐ Hold From Further Processing

▼ Header ?

\*Requester ETEST      Ella Test

\*Requisition Date 12/03/2018      [Requester Info](#)

Origin DII      Dept of Info & Innovation

Currency Code USD      Dollar

Accounting Date 12/03/2018

[Requisition Defaults](#)      [Add Comments](#)

[Requisition Activities](#)

[Document Status](#)

**Amount Summary** ?

Total Amount 100.00 USD

Pre-Encumbrance Balance 100.00 USD

**Add Items From** ?



[Purchasing Kit](#)      [Catalog](#)



[Item Search](#)      [Requester Items](#)

Search for Lines

Line  To  [Retrieve](#)

**Line** ?

Personalize | Find | View All |   First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Lasermate 20 Offline-Base W/Nester Serial #379	 2.0000	EA	70099	50.00000	100.00	Approved

10. Complete the necessary changes for any additional lines

11. Click **Save** at the bottom of the page

12. The requisition now has a budget status = Not Chk'd

Follow the specific controls within your department for budget checking.

**Create a Change Order to a Requisition Distribution is Complete**

## Print a Requisition

**WorkCenter navigation:** Purchasing WorkCenter > Links Pagelet > Requisitions > Reports/Queries tab > Reports/Processes > Requisition Report > Requisition Print

**Navigator Menu navigation:** Purchasing > Requisitions > Reports > Print Requisition

The **Requisition Print** page displays, click on the **Add a New Value** button:

The screenshot shows the 'Requisition Print' page. At the top left is the title 'Requisition Print'. Below it is the 'Add a New Value' section. On the right, there is a search button labeled 'Find an Existing Value'. In the 'Add a New Value' section, there is a text input field labeled '\*Run Control ID' containing the text 'Req\_Print'. Below this field is an 'Add' button. A red rectangular box highlights the entire 'Add a New Value' section, including the input field and the button.

1. **Run Control ID** - Enter a run control ID (EXAMPLE: Req\_Print)
2. Click **Add**

The **Print Requisition** page displays:

The screenshot shows the 'Print Requisition' page. At the top left is the title 'Print Requisition'. Below it are several fields: 'Run Control ID' with the value 'Req\_Print', 'Language' with a dropdown menu set to 'English', and radio buttons for 'Specified Language' (selected) and 'Recipient's Language'. To the right of these fields are links for 'Report Manager' and 'Process Monitor', and a 'Run' button highlighted with a red box. Below these fields is a section titled 'Report Request Parameters'. Inside this section, there are fields for 'Business Unit' (value '01105') and 'Requisition ID' (value '0000000066'), both highlighted with red boxes. Below these are fields for 'From Date', 'Through Date', and 'Requester'. To the right of the 'Report Request Parameters' section is a 'Statuses to Include' section. It contains a list of checkboxes: 'Approved', 'Canceled', 'Completed', 'Open', and 'Pending', all of which are checked. To the right of this list is a 'Select All' button highlighted with a red box. At the bottom of the 'Statuses to Include' section is a dropdown menu labeled 'NOT On Hold'.

3. **Business Unit** - Enter your business unit number
4. **Requisition ID** - Enter the requisition ID
5. Click **Select All** in the Statuses to Include section
6. Click **Run**

The **Process Scheduler Request** window opens:

Process Scheduler Request

User ID ETEST Run Control ID Req\_Print

Server Name Run Date 12/03/2018  
Recurrence Run Time 10:39:17AM  
Time Zone

Reset to Current Date/Time

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web	PDF	Distribution

OK Cancel

7. Click OK

You are returned to the **Print Requisition** page:

Print Requisition

Run Control ID Req\_Print Language English Specified Language Recipient's Language  
Process Instance: 9471655

Report Manager Process Monitor Run

**Report Request Parameters**

Business Unit 01105  
Requisition ID 0000000066  
From Date  
Through Date  
Requester

**Statuses to Include**

☒ Approved  
☒ Canceled  
☒ Completed  
☒ Open  
☒ Pending

Select All

NOT On Hold

Save Notify Add Update/Display

8. Click the **Report Manager** link

The **Report Manager** page displays:

List
Explorer
**Administration**
Archives

View Reports For

User ID: EHOEFEL
Type:
Last:
1
Days:
Refresh

Status:
Folder:
Instance:
to:

Report List

1-5 of 5
View All

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514128	12437255	<a href="#">Requisition Print SQR</a>	01/22/2024 9:46:34AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

- Click on the **Administration** tab
- Click **Refresh** until the **Status = Posted**
- Click on the **Requisition Print SQR** link in the Description column A new browser window will open displaying the Requisition for printing:
- Click on the printer icon to print the Requisition

Ship To:
Agency of Digital Services  
133 State St  
Montpelier VT 05633

Business Unit: 01105 APPROVED  
Req ID: 0000000066 Date: 12/03/2018 Page: 1  
Requisition Name: 0000000066  
Requester: Ella Test Currency: USD  
Requester Signature:

Line-Schd	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt	Due Date
1-1		Lasermate 20 Offline-Base W/Nester Serial #379		2.0000	EA	50.00	100.00	12/28/2018

Buyer: Linda T Wortman  
Attn: Ella Test

Line Total: 100.00  
Total Requisition Amount: 100.00



If a new window doesn't open or it opens and the Req. is not there to be printed:

Administration

View Reports For

User ID: EHOEFEL Type: Last 1 Days Refresh

Status: Folder: Instance: to:

Report List

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514053	12437182	Requisition Print SQR	01/19/2024 8:40:33AM	Acrobat (*.pdf)	Posted	Details

13. Click the **Details** link on the far right of the line

The **Report Detail** window opens:

Report Detail

Report

Report ID: 5514053 Process Instance: 12437182 Message Log

Name: PORQ010 Process Type: SQR Report

Run Status: Success

Requisition Print SQR

Distribution Details

Distribution Node: FMPRD Expiration Date: 01/26/2024

File List

Name	File Size (bytes)	Datetime Created
SQR_PORQ010_12437182.log	1,796	01/19/2024 8:41:05.678438AM EST
porq010_12437182.PDF	9,375	01/19/2024 8:41:05.678438AM EST
porq010_12437182.out	70	01/19/2024 8:41:05.678438AM EST

Distribute To

Distribution ID Type: Distribution ID

User: EHOEFE

OK Cancel

14. Click the **PDF file** link

A new browser window will open displaying the Requisition for printing:

Requisition							
<b>Ship To:</b> Agency of Digital Services 133 State St Montpelier VT 05633		<b>Business Unit:</b> 01105 <b>APPROVED</b>					
		Req ID:		Date		Page	
		0000000066		12/03/2018		1	
		Requisition Name: 0000000066					
		Requester				Currency	
		Ella Test				USD	
		Requester Signature					
<u>Line-Schd</u>	<u>Item</u>	<u>Description</u>	<u>Mfg ID</u>	<u>Quantity</u>	<u>UOM</u>	<u>Price</u>	<u>Extended Amt Due Date</u>
1-1		Lasermate 20 Offline-Base W/Nester Serial #379		2.0000	EA	50.00	100.00 12/28/2018
		Buyer: Linda T Wortman					
		Attn: Ella Test					
						<u>Line Total:</u>	<u>100.00</u>
						<u>Total Requisition Amount:</u>	<u>100.00</u>

15. Click the printer icon in the toolbar to print the req

**Printing a Requisition is Complete**

## Finalize a Partially used Requisition

**Situations when this function is used:** A requisition was entered with a total dollar value of \$10,000.00 and the PO was created for \$8,000.00. The requisition needs to be finalized to release the remaining pre-encumbered amount.

This process will immediately liquidate any remaining encumbrance on the Requisition, but it is not the most efficient way to clean up items at month or year end. For managing and reconciling requisitions for month or year end, it is more efficient to use the Reconcile a Requisition method shown in this manual.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find a New Value** button:

**Purchase Order**

**Find an Existing Value** ⊕ Add a New Value

▼ **Search Criteria**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches ✎ 🔖 Saved Searches Choose from saved searches ✎

\*Business Unit = 01105 🔍  
PO ID begins with 0000008185 🔍

Purchase Order Date =  🔍  
PO Status =  🔍  
Short Supplier Name begins with  🔍  
Supplier ID begins with  🔍  
Supplier Name begins with  🔍  
Buyer begins with  🔍  
Buyer Name begins with  🔍  
PO Type =  🔍  
Purchase Order Reference begins with  🔍

Hold From Further Processing ☐

^ Show fewer options

☐ Case Sensitive

Search Clear

1. **Business Unit** - Accept default value or enter a valid business unit
2. **PO ID** - Enter the PO ID associated with the Requisition you need to finalize
3. Click **Search**

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

**Purchase Order**

Business Unit 01105  
PO ID 000008185  
Change Order 1  
Copy From

PO Status: Dispatched  
Budget Status: Valid

☐ Hold From Further Processing

**Header**

\*PO Date: 12/03/2018  
\*Supplier: OFFICEMAX-001  
\*Supplier ID: 0000005932  
\*Buyer: ETEST

Supplier Search  
Supplier Details  
Office Max  
Ella Test

Doc Tol Status: Valid  
Backorder Status: Not Backordered  
Receipt Status: Not Recvd  
\*Dispatch Method: Print

Create BackOrder  
Dispatch

PO Reference:

Header Details  
PO Defaults  
PO Activities  
**Requisitions**  
Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

**Amount Summary**

Merchandise	50.00	
Freight/Tax/Misc.	0.00	
Total Amount	50.00	USD
Encumbrance Balance	50.00	USD

Calculate

4. Click on the **Requisitions** link to review requisition information

The **PO Header Requisition** page displays:

PO Header Requisition Page

Maintain Purchase Order

**Requisition Details -- OFFICEMAX-001**

Business Unit 01105  
PO ID 000008185

**Requisition Details**

Personalize | Find | View All | First | 1 of 1 | Last

Line	Sched	Dist	Request BU	Req ID	Req Line	Req Sched	Req Distr	PO Qty	Amount	Req Amount	Req Qty	Final
1	1	1	01105	0000000066	1	1	1	1.0000	50.000	100.000	2.0000	<input type="checkbox"/>

Return

5. Click **Return** to go back to the main page

To finalize the requisition:

Maintain Purchase Order

**Purchase Order**

Business Unit 01105  
PO ID 000008185  
Change Order 1  
Copy From

PO Status: Dispatched  
Budget Status: Valid

☐ Hold From Further Processing

**Finalize Document**

6. Click on the **Finalize Document** icon

The following warning **Message** opens:

**Message**

This action will finalize all eligible distributions for this PO. Continue? (10200,335)

Yes

No

7. Click **Yes**

You will be returned to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01105  
PO ID 0000008185  
Change Order 1  
Copy From

PO Status Dispatched  
Budget Status Not Chk'd  
Hold From Further Processing

\*PO Date 12/03/2018  
\*Supplier OFFICEMAX-001  
\*Supplier ID 0000005932  
\*Buyer ETEST  
PO Reference

Supplier Search  
Supplier Details  
Office Max  
Ella Test

Header Details  
PO Defaults  
PO Activities  
Requisitions  
▼ Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

Doc Tol Status Valid  
Backorder Status Not Backordered  
Receipt Status Not Recvd  
\*Dispatch Method Print

Create BackOrder  
Dispatch

Amount Summary

Merchandise 50.00  
Freight/Tax/Misc. 0.00  
Total Amount 50.00 USD  
Encumbrance Balance 50.00 USD

Calculate

Add Items From  
Catalog  
Purchasing Kit

Select Lines To Display  
Search for Lines  
Line To Retrieve

Lines

Personalize | Find | View All | First 1 of 1 Last

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		Lasermate 20 Offline-Base W/Nester Serial #379	1.0000	EA	70099	50.00000	50.00	Approved			

8. Click **Save** at the bottom of the page

You'll notice the Budget Status is now Not Chk'd

9. Click the **Budget Check** icon

Once you receive a **Valid** budget check the pre-encumbrance on the budget has been released.

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Maintain Purchase Order

**Purchase Order**

Business Unit 01105  
 PO ID 0000008185  
 Change Order 1  
 Copy From

PO Status Dispatched  
**Budget Status Valid**  
☐ Hold From Further Processing

**Header**

\*PO Date 12/03/2018 Supplier Search  
 \*Supplier OFFICEMAX-001 Supplier Details  
 \*Supplier ID 0000005932 Office Max  
 \*Buyer ETEST Ella Test  
 PO Reference

Doc Tol Status Valid  
 Backorder Status Not Backordered Create BackOrder  
 Receipt Status Not Recvd  
 \*Dispatch Method Print Dispatch

**Amount Summary**

Merchandise	50.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	50.00 USD	
Encumbrance Balance	50.00 USD	

Header Details  
 PO Defaults  
 PO Activities  
**Requisitions**  
 Actions

Activity Summary  
 Edit Comments  
 Add ShipTo Comments  
 Document Status

10. Click on the **Requisitions** link

The box under Final at the far right hand side of the page will be checked:

PO Header Requisition Page

Maintain Purchase Order

**Requisition Details -- OFFICEMAX-001**

Business Unit 01105 PO ID 0000008185

**Requisition Details** Personalize Find View All First 1 of 1 Last

Line	Sched	Dist	Request BU	Req ID	Req Line	Req Sched	Req Distr	PO Qty	Amount	Req Amount	Req Qty	Final
1	1	1	01105	0000000066	1	1	1	1.0000	50.000	100.000	2.0000	<input checked="" type="checkbox"/>

Return

11. Click **Return** to return to the Purchase Order page

**Finalizing a Partially used Requisition is Complete**

## Batch Budget Checking

**Situations when this function is used:** Batch budget checking is more time efficient than completing the process 1 transaction at a time - requisitions must be in Approved status in order to successfully budget check. Batch budget checking is also used to budget check a requisition(s) after it has been canceled or moved to complete.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Requisition Budget Check

**Navigator Menu navigation:** Purchasing > Requisitions > Budget Check

The **Requisitions Budget Check** page displays, click on the **Add a New Value** button:



Requisition Budget Check

Add a New Value Find an Existing Value

\*Run Control ID Budget\_Check

Add

1. **Run Control ID** - Enter a Run Control ID
2. Click **Add**

The **Budget Check** page opens:

3. **Process Frequency** - Select the **Always Process** radio button
4. **Description** - Enter a description
5. **Process Options Box** - Use the drop-down arrows to select the appropriate values for any or all the fields  
*Caution: If you run batch budget checking without a range of requisition numbers entered you will pick up and budget check all requisitions for your BU*
6. Click **Run**

The **Process Scheduler Request** window opens:

7. Click **OK**



You're sent back to the **Budget Check** page:

**Budget Check**

Run Control ID Budget\_Check Report Manager **Process Monitor** Run

Process Request Find | View All First 1 of 1 Last

**Process Frequency**

☐ Process Once ☒ Always Process ☐ Don't Run

Request Number 1 \*Description Budget Check

**Process Options**

\*Business Unit Value Business Unit 01105

Req ID Value Req ID 000000065

Req Date All

Actg Date All

Requester ID All Requester ID's

Origin All Origins

REQ Status All

Save Return to Search Previous in List Next in List Notify Add Update/Display

8. Click the **Process Monitor** link

The **Process List** displays:

Process List Server List

**View Process Requests**

User ID EHOEFEL Type Last 1 Days Refresh

Server Name Instance Range Clear

Run Status Distribution Status Save On Refresh Report Manager Reset

Process List

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437182		Req_Print	SQR Report	PORQ010	EHOEFEL	01/19/2024 8:40:02AM EST	Success	Posted	Details	Actions

9. Click **Refresh** until the **Run Status = Success** and the **Distribution Status = Posted**

**Note: If the Run Status shows Warning look for budget check exceptions using the following navigation:** Commitment Control > Review Budget Check Exceptions > Purchasing and Cost Management > Requisitions

**Batch Budget Checking is Complete**

## Inquire on Requisition Accounting Entries

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Requisition Accounting Entries

**Navigator Menu navigation:** Purchasing > Requisitions > Review Requisition Information > Requisitions

The **Selection Criteria** page opens with your default BU:

**Selection Criteria**

\*Business Unit 01105  
From Req 0000000014 To Req 0000000014  
Requisition Status  
Fiscal Year From/To  
Max Rows 300  
\*Accounting Line View Option Standard \*Ledger Group DETAIL\_GRP

**ChartFields** Personalize Find

	*GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1	01105							

OK Cancel Refresh

1. **Business Unit** - Leave as default or enter BU
2. **From Req & To Req** - Enter the Req ID # (including the leading zeros)
3. **Ledger Group** - to see all detail in the accounting entries enter DETAIL\_GRP in this field if it does not default in
4. **GL Unit** - Enter GL Unit
5. Click **OK**

The **Accounting Entries** page displays:

**Accounting Entries**

Business Unit 01105  
From Req 0000000014 To Req 0000000014  
Status  
From Fiscal Year To  
Accounting Line View Option Standard Ledger Group DETAIL\_GRP

**Accounting Entries** Personalize Find View All First 1-2 of 4 Last

Requisition ID	Requester	Change Track Batch	Trans Type	Unpost Seq	Line	Sched	Dist	Entry Event	GL Unit	Account	Fund	D
0000000014	CNILES		REQ_PREENC	0	1	1	1	1	01105	522214	10000	1
0000000014	CNILES		REQ_PREENC	0	1	1	1	1	01105	522214	10000	1

Pre-Encumbrance Balance 0.00 USD

Accounting Lines Search

Notify Refresh

7. Use the **Scroll Bar** to see additional information

**Accounting Entries**

Business Unit 01105

From Req 0000000014 To Req 0000000014

Status

From Fiscal Year To

Accounting Line View Option Standard Ledger Group DETAIL\_GRP

**Accounting Entries** Personalize | Find | View All | | First 1-2 of 4 Last

Details **ChartFields**

Requisition ID	Requester	Change Track Batch	Trans Type	Unpost Seq	Line	Sched	Dist	Entry Event	GL Unit	Account	Accounting
0000000014	CNILES		REQ_PREENC	0	1	1	1		01105	522214	
0000000014	CNILES		REQ_PREENC	0	1	1	1		01105	522214	

Pre-Encumbrance Balance 0.00 USD

Accounting Lines Search

Notify Refresh

- Click on the **Chartfields** tab for the view shown above or click on the **Show all columns** button to view all column information for each line

**Inquiring on Requisition Accounting Entries is Complete**

## Reconcile a Requisition

**Situations when this function is used:** Requisitions that have been canceled and/or liquidated need to be moved to a Completed status. Requisitions with a remaining pre-encumbrance can also be moved to complete and the pre-encumbrance liquidated on the Reconciliation Workbench by selecting to “close” the requisition. Doing this regularly (we recommend monthly) throughout the year will keep the volume of Requisition’s on the Requisition Activity report at a more manageable level, helping to ensure timely month-end and year-end closing.

**\*\*Note – before running this process you should run the VT Req & PO Budgetary Activity Report (VTPO8002). Instructions on how to run this report are located in the PO Reporting manual. Use this report to help determine what requisitions should be moved to complete status.**

Requisitions can be moved to complete on the Requisition Reconciliation Workbench if all the following is true:

- The requisition is in a Canceled status or has been sourced to a purchase order
- The requisition’s related purchase order(s) have been moved to a complete status
- The Due date is less than or equal to the current date

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Requisitions > Requester’s WorkBench

**Navigator Menu navigation:** Purchasing > Requisitions > Requestor’s Workbench

The **Requester’s WorkBench** page displays, click on the **Add a New Value** button:

The screenshot shows the 'Requester's WorkBench' interface. At the top left, there is a link 'Requester's WorkBench'. Below it, on the left, is a blue button labeled 'Add a New Value'. On the right, there is a search button labeled 'Find an Existing Value'. In the center, there is a form with two input fields: '\*Business Unit' with the value '01105' and '\*WorkBench ID' with the value 'Train-16'. Below these fields is an 'Add' button. A red rectangular box highlights the entire form area containing the two input fields and the 'Add' button.

1. **Business Unit** - Enter a BU
2. **WorkBench ID** - Create an ID name
3. Click **Add**

The Requestor's WorkBench page displays:

Requester's Workbench

**Filter Options**

Business Unit 01105      WorkBench ID TRAIN-16

Description

Enter search criteria and click on Search. Leave blank for all values.

**Search Criteria**

Requisition 0000000063      To 0000000063

Requisition Name 0000000063

Req Date      Until

Activity Date      To

Due Date      To

Supplier ID

Item ID

Requester

**Status**

☐ Open      ☐ Approved      ☐ Lines Approved

☐ Pending Appr      ☐ Canceled      ☐ Denied

**Sourcing**

☐ Partially or Fully Sourced

**Encumbrance**

☐ Open Pre-encumbrances

**ChartFields**      Personalize | Find | View All |      First 1 of 1 Last

Chartfields

GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate

Search      Return to Requester's Workbench

Notify      Refresh

- 4. Requisition** - Enter the Requisition number, a range of requisition numbers, or leave blank
- 5. Click Search**

A list of Requisitions will be displayed:

**Requester's Workbench**

Business Unit 01105 WorkBench ID TRAIN-16

\*Description Closing Req 63

Select Reqs for Further Processing

**List of Requisitions** Personalize | Find | View All | | Download %1 Table to Excel First 1 of 1 Last

Details

	Requisition ID	Doc Status	Hold	Requisition Status	Budget Status	Req Date	Last Activity	Name	Track Batch	Lines
<input checked="" type="checkbox"/>	0000000063		N	Canceled	Valid	11/29/2018	11/29/2018	Karen L Symonds		

☒ Select All ☐ Clear All

Action:

Go To: [Set filter options](#) [View Processing Results](#)

- Description** - Enter a description
- Select the individual requisitions to be moved to complete status using the **checkbox** to the left of each Requisition ID. The **Select All** link can be used if every requisition should be moved to complete status
- Click **Close**

The **Processing Results** page displays:

Requester's Workbench

## Processing Results

Business Unit 01105      WorkBench ID TRAIN-16

Description Closing Req 63

Select Reqs for Further Processing

Accounting Date for Action 12/11/2018

☐ Update Budget Date Equal to Accounting Date

**Not Qualified**    Personalize | View All | 1 of 1 | Last

Requisition ID	Log

**Qualified**    Personalize | View All | 1 of 1 | Last

Requisition ID	Line	Sched	Distrib Line
0000000063			

Proceed: **Yes**    No    [Return to Requester's Workbench](#)

[Notify](#)    [Refresh](#)

9. Click **Yes**

The following **Message** opens:

Message

Continue to Close Reqs (10109,5)

**Yes**    No

10. Click **Yes**

You are taken back to the **Requester's Workbench**:

**Requester's Workbench**

Business Unit 01105      WorkBench ID TRAIN-16

\*Description Closing Req 63

Select Reqs for Further Processing

**List of Requisitions**      Personalize | Find | View All | | Download %1 Table to Excel      First 1 of 1 Last

**Details**

	Requisition ID	Doc Status	Hold	Requisition Status	Budget Status	Req Date	Last Activity	Name	Track Batch	Lines
<input checked="" type="checkbox"/>	0000000063		N	Complete	Valid	11/29/2018	12/11/2018	Karen L Symonds		

Action:                 

Go To:      [Set filter options](#)      [View Processing Results](#)

Notify      Refresh

### Requisition Status = Complete

If the Requisition appears in the **Not Qualified** box, click the icon under **Log** for help in determining why it's Not Qualified for reconciliation:

**Requester's Workbench**

**Processing Results**

Business Unit 01105      WorkBench ID TRAIN-15

Description Closing Req 64

Select Reqs for Further Processing

Accounting Date for Action 12/11/2018

☐ Update Budget Date Equal to Accounting Date

**Not Qualified**      Personalize | View All |      Personalize 1 of 1 Last

	Requisition ID	Log
<input type="checkbox"/>	0000000064	

**Qualified**      Personalize | View All |      Personalize 1 of 1 Last

Requisition ID	Line	Sched	Distrib Line

☒ Select All      ☐ Clear All

Proceed:                  [Return to Requester's Workbench](#)

Notify      Refresh



The **Requisition Logs** page displays:

Requester's Workbench

### Requisition Logs

Business Unit 01105 WorkBench ID TRAIN-15

Description

Requisition ID 0000000064

Log Personalize | Find | View All | First 1 of 1 Last

Line	Sched	Dist	Message Text	Notes
1	1	1	The Requisition may not be closed because it has not been fully sourced.	

Return

- Review the [PO/Requisition Xref report](#) to determine PO number(s) associated with this requisition. If the purchase order can be moved to closed then this process can be run again and the Requisition would be available to close.
- A requisition will not move to closed status if the Due date on the requisition is greater than the current date.
- Review the reason that the requisition is not qualified and determine if the requisition should really be closed.
- If it is determined the requisition can be closed, you can override the qualification status, by doing the following:

Requester's Workbench

### Processing Results

Business Unit 01105 WorkBench ID TRAIN-15

Description Closing Req 64

Select Reqs for Further Processing

Accounting Date for Action 12/11/2018

☐ Update Budget Date Equal to Accounting Date

**Not Qualified** Personalize | View All | Personalize 1 of 1 Last

	Requisition ID	Log
<input checked="" type="checkbox"/>	0000000064	

**Qualified** Personalize | View All | Personalize 1 of 1 Last

Requisition ID	Line	Sched	Distrib Line

☒ Select All ☐ Clear All

Proceed: Yes No Return to Requester's Workbench

Notify Refresh

11. Click on the box next to Req ID and click on the **Override** arrow

The requisition is now **Qualified** to close:


Requester's Workbench

### Processing Results





Business Unit 01105      WorkBench ID TRAIN-15



Description Closing Req 64





Select Reqs for Further Processing


Accounting Date for Action 12/11/2018 

☐ Update Budget Date Equal to Accounting Date

**Not Qualified**   Personalize | View All |    Personalize  1 of 1  Last 



Requisition ID	Log
	

**Qualified**   Personalize | View All |    Personalize  1 of 1  Last 

Requisition ID	Line	Sched	Distrib Line
0000000064			

☒ Select All   ☐ Clear All

Proceed:         [Return to Requester's Workbench](#)

 Notify    Refresh

12. Click **Yes**

The following Message displays:

Message

Continue to Close Reqs (10109,5)

13. Click **Yes**

You're taken back to the **Requester's Workbench**:

**Requester's Workbench**

Business Unit 01105      WorkBench ID TRAIN-15  
\*Description Closing Req 64

Select Reqs for Further Processing

**List of Requisitions**      Personalize | Find | View All | | Download %1 Table to Excel      First 1 of 1 Last

Details

	Requisition ID	Doc Status	Hold	Requisition Status	Budget Status	Req Date	Last Activity	Name	Track Batch	Lines
<input checked="" type="checkbox"/>	0000000064		N	Complete	Not Chk'd	11/29/2018	12/11/2018	Karen L Symonds		

☒ Select All      ☐ Clear All

Action:                    
                      

Go To:      [Set filter options](#)      [View Processing Results](#)

Notify      Refresh

- **Requisition Status = Complete**
- **Budget Status = Not Checked**

The requisition will need to be budget checked using the [batch budget check process](#).

### Reconcile a Requisition is Complete

## Reports and Queries

Reports and Queries for Requisitions can be found in the [Purchasing Reporting Manual](#).