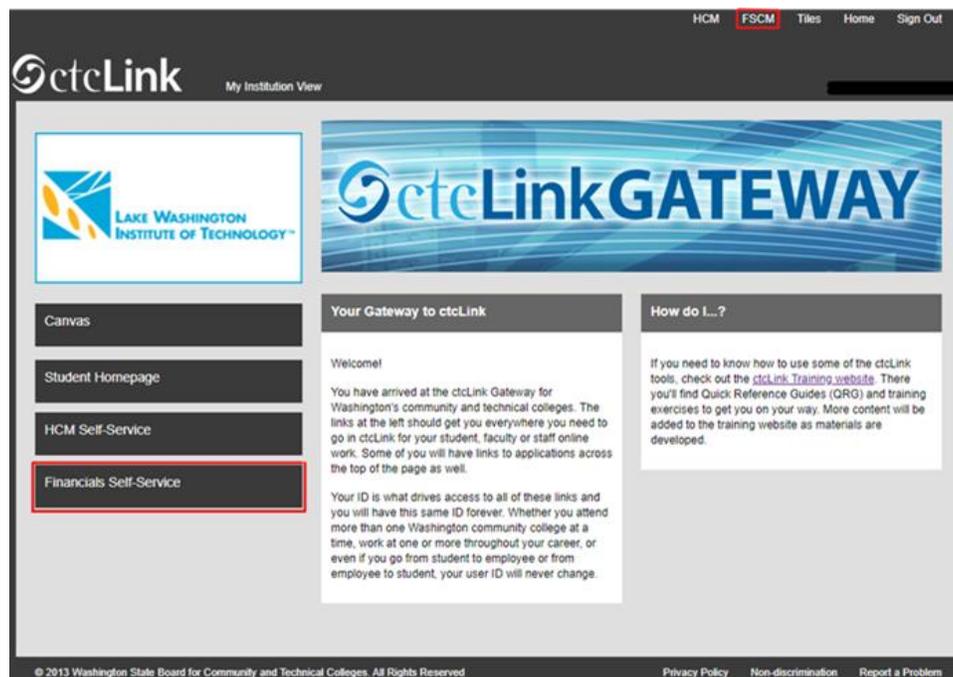




Creating a Requisition

Intended Audience: Campus Community

To access Purchasing documentation, you will need to be in LionLink's Finance Pillar. Select the "FSCM" hyperlink on the top right-hand side of your screen or the "Financials Self Service" tile on the left-hand side of your screen.



Navigation Path: Navbar > Navigator > Purchasing > Requisitions > Add/Update Requisitions

1. The **Requisitions Search Page** displays.
2. Confirm that the "Add a New Value" tab is selected.
3. Enter the LWTech **Business Unit (WA260)** into the "Business Unit" field.
4. Confirm that "NEXT" is entered in the **Requisition ID** field.
 - a. Do not put in your own requisition ID. Leave it as "NEXT."
5. Select the "Add" button.

Requisitions

Find an Existing Value | Keyword Search | **Add a New Value**

Business Unit

Requisition ID

Add

Find an Existing Value | Keyword Search | Add a New Value

6. The “Maintain Requisition” Page displays.
 - a. The required fields are noted in red.

Maintain Requisitions

Requisition

Business Unit WA220 Status Pending
 Requisition ID NEXT Budget Status Not Chkd
 Requisition Name Copy From Hold From Further Processing

Header

*Requester Requester Info
 *Requisition Date On Line Entry
 Origin On Line Entry
 *Currency Code USD Dollar Amount Summary
 Accounting Date Total Amount 0.00 USD

Requisition Defaults Add Comments
 Requisition Activities Add Request Document

Add Items From

Purchasing Kit Catalog
 Item Search Requester Items

Line

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

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Pending

View Printable Version | View Approvals | *Go to ...More...

7. From the Requisition page, the “Requester” field displays the ID of the person logged into the system and entering the requisition.
8. Enter a “Requisition Name.”
 - a. Always include the vendor's name and your department name in the requisition name.
 - i. Example: OFFICEDEPOT_PURCHASING
 - b. Give the requisition a name that you will be able to track.
 - c. If this requisition is on an open PO, indicate so in the requisition name.
9. Use the “Requisition Date” field to enter the creation date of the requisition. The field default value is the current system date.
 - a. Always use the current date.
10. The “Origin” field provides information about the origin of the requisition.
 - a. Please use “ONL”, meaning that the requisition is being generated online.
11. The “Currency Code” field displays the requisition transaction currency.
 - a. This should be set to USD.

12. The value in the **“Accounting Date”** field determines the open period or allowable open date range for budget checking a requisition.
 - a. Always use the current date for **“Accounting Date.”**

13. Select the **“Add Comments”** link to enter comments for a transaction. You can enter a unique comment or select from predefined standard comments.
 - a. Include a room number for delivery purposes.

14. Select the **“Show at Voucher”** and **“Send to Supplier”** checkboxes.

15. Use the attachments function by selecting the **“Attach”** button. **Attach all supporting documentation for the purchase.**
 - a. For specific products, please attach a hyperlink to the item or a quote for the item.

16. Select the **“OK”** button.

Note: If you are creating a requisition with many line items that will be charged to the same budget, you can use the **“Requisition Defaults”** to input the chartstring that you would like to be charged. That chartstring will then automatically populate for all line items at step 32. Simply click on the **Requisition Defaults** hyperlink...

Maintain Requisitions

Requisition

Business Unit WA260 Status Open Budget Status Not Chk'd

Requisition ID NEXT Hold From Further Processing

Requisition Name Copy From

▼ Header ?

*Requester

*Requisition Date 04/15/2022 Requester Info

Origin ONL On Line Entry

*Currency Code USD Dollar

Accounting Date 04/15/2022 Amount Summary ?

Requisition Defaults Add Comments

Requisition Activities Add Request Document

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

Amount Summary		
Total Amount	0.00	USD

Scroll to the bottom of the **Requisition Defaults** page and input the desired chartstring in the Distribution line.

17. Go to the Requisition “Line” subsection and select the “Details” tab. The **Details** tab will display.
 - a. The required fields are noted in red.
 - b. The Requisition Line is where you enter what it is you want to buy, by specifying and **Item ID** (if possible), **Description**, **Quantity**, **Unit of Measurement (UOM)**, and **Category**.
 - c. For each individual item that you are purchasing, you must add a separate line by using the “+” button.
 - i. Note: **Price** will not be input at this step. **Price** will be entered later in the requisition.

18. In the “Item” field, enter the ID of the item that you want to order.
 - a. If you don’t know the Item ID, then click the magnifying glass in the item field and select from the displayed list.

- b. After selecting the Item ID, a description for that item will automatically populate in the **Description** field. Please delete that description and enter a more specific description of the item you are ordering.

19. Enter how many of said item you would like to purchase into the “**Quantity**” field.

20. Use the “**Unit of Measure**” field to enter a default unit of measure for the requisition.

- a. Any “**UOM**” will work, but pick one that is relevant to the item you are purchasing.

21. Click on the **“Ship To/Due Date”** tab in the **Line** subsection.
 - a. The required fields are noted in red.
22. On the **“Ship To/Due Date”** tab, enter the desired information into the **Due Date** field.
 - a. Input any date in the future or leave the field blank.
23. Use the **“Ship To”** field to enter the default location to where the supplier will ship the order.
 - a. Always ship to **“LWSHIPREC”**.
24. Click on the **“Supplier Information”** tab in the **Line** subsection. The Supplier Information tab will display.

The screenshot shows the 'Supplier Information' tab selected. The 'Supplier' field is empty and highlighted with a red box. The 'Item' field contains '005-05' and the 'Description' field contains 'Abrasive Equipment'. The 'Location' field is also empty and highlighted with a red box. The 'Details' tab is also visible and highlighted with a red box.

- a. **Item** and **Description** should auto populate based on the information entered on the **Details** tab.
25. Enter the desired **“Supplier ID”** if you have this information
 - a. If you do not, click on the magnifying glass and select your desired supplier.
 - i. Note: The Purchasing Services Department will provide a list of LWTech ready suppliers.
 - ii. If you do not find your desired supplier, contact the Purchasing Services Department.
 - b. If the supplier does not exist in the system, please email the Purchasing Services Department (purchasing@lwtech.edu) and request that the supplier is added to the system. In the subject line of the email, write **“Supplier Add Request.”**
26. Note: You may get a "Supplier item price is not available - use item standard price" message. If applicable, select the **“OK”** button to return to the Supplier Information tab.
27. Select **260** in the **“Location”** field.
28. Click on the **Details** tab in the **Line** subsection once again.
29. Select the **Schedule Icon** button to access the Schedule page, where you can view schedule shipment details and distribution information for each line item. The Schedule page will display.

The screenshot shows the 'Details' tab selected. The 'Quantity' field is empty and highlighted with a red box. The 'Status' field contains 'Pending'. The 'Details' tab is also highlighted with a red box.

30. On the Schedule page, use the “**Attention To**” field to define the person to whom the goods will be delivered.
31. Select the **Distribution Icon** button on right hand side.
32. The **Distribution Detail** page will display with the available “**Chartfields.**”
 - a. You may have to scroll right to see all of the available Chartfields.
 - b. The required fields are: Account, Oper Unit, Fund, Class, Dept, State Purpose (and Approp for state funds only).
 - i. For Grant and Capital budgets, you ALSO need PC Bus Unit, Project, and Activity.
 - c. Please refer to the following crosswalks for Chartstring help:
 - i. [Sub-Object to Account Code](#)
 - ii. [Legacy Org to Department Number](#)

Distribution Details x

Maintain Requisitions Help

Distribution

Requisition ID NEXT Item 005-05 Abrasive Equipment and Tools
 Line 1 Status Active
 Schedule 1

Ship To 220-000001 220-Prime Quantity 0.0000 EA
 Distribute By Quantity Open Quantity 0.0000
 Liquidate By Amount Merchandise Amt 0.00 USD
 SpeedChart Multi-SpeedCharts

Distributions

Chartfields	Details	Asset Information	Budget Information												
Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Approp	PC Bus Unit	Project	
1	Open	<input type="text"/>	0.0000	0.00	WA220	<input type="text"/>									

OK Cancel Refresh

33. Select if you would like to **Distribute By** amount or quantity to different budgets.
34. In the “**Percent**” field, enter the percentage of the item that you would like to charge to the chartstring you are about to input.
 - a. If you are using multiple Chartstrings, this is where you decide how much of the item you would like to charge one Chartstring over another.
 - i. Select the “+” button to add another Chartfield line.
 - ii. The sum of Percentages must = 100%
35. The “**Quantity**” field will auto populate based on your prior inputs.
36. Enter the chartstring of the budget that you would like to charge.
 - a. Found in SharePoint location (To be determined).
37. Click the “**OK**” button.
38. The **Schedule** page will display once again.

39. On the **Schedule** page, select the “**Save**” button.

Maintain Requisitions
Schedule

Business Unit WA220 Requisition Date 11/18/2021
 Requisition ID NEXT Status Pending
[Return to Main Page](#)

Line	Item	Description	Quantity	Merchandise Amt	USD
1	005-05	Abrasive Equipment and Tools	1.0000	0.00	USD

Schedule

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	220-0000	1.0000	0.00000	0.00		Roux Washing	Active

[Add Ship To Comments](#)

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

40. The **Requisition** page will display once again.

41. On the **Requisition** page, from the Line subsection and on the **Details** tab, enter the appropriate information into the “**Price**” field.

42. Select the “**Save**” button

Line

Line	Item	Description	Quantity	Merchandise Amt	USD
1	005-05	Abrasive Equipment and Tools	1.0000	0.00	USD

Schedule

Details

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	220-0000	1.0000	0.00000	0.00		Roux Washing	Active

[Add Ship To Comments](#)

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

43. Notice that the “**Requisition ID**” and “**Requisition Name**” fields have been updated with the new requisition values. The Status field displays the requisition status.

Requisition

Business Unit WA000
 Requisition ID 000000010
 Requisition Name Lambert_092319_REQ1

Status Open
 Budget Status Not Chk'd

Hold From Further Processing

Header

*Requester CTC_JLAMBERT Jerry Lambert
 *Requisition Date 09/24/2019 Requester Info
 Origin ONL On Line Entry
 *Currency Code USD Dollar
 Accounting Date 09/24/2019

Requisition Details Add Comments
 Requisition Activities Add Request Document
 Document Status

Amount Summary

Total Amount	2,350.00	USD
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44. Select the **Budget Pre-Check** icon to the right of “**Budget Status.**”

a. After **Budget Pre-Check**, the Budget Status should read “**Prov Valid.**”



- b. If Budget Status reads, "Error" contact:
 - i. Kelly Paustain (Kelly.paustain@lwtech.edu) for departmental budgets
 - ii. Andrea Breen (andrea.breen@lwtech.edu) for grant budgets
 - iii. Yan Li (yan.li@lwtech.edu) for capital budgets
- c. Do not submit the requisition with a budget status of "Error" or "Not Chk'd".



45. Select the green check mark icon to the right of the "Status" field to **Submit for Approval**.



46. The **Status** becomes "Pending" and **Submit for Approval** icon disappears.

47. Process Complete.

Note: You can check on the status of your requisition by selecting the "Document Status" hyperlink.

Employee Self Service Add/Update Requisitions

Maintain Requisitions

Requisition

Business Unit: WA260
 Requisition ID: 0000000029
 Requisition Name: 0000000029

Header

*Requester: [Search]
 *Requisition Date: 02/03/2022 [Calendar] Requester Info
 Origin: ONL [Search] On Line Entry
 *Currency Code: USD [Search] Dollar
 Accounting Date: 02/03/2022 [Calendar]

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

Add Items From

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

Status: Open [Checkmark] [X]
 Budget Status: Prov Valid [Magnifying Glass] [Document]

Hold From Further Processing

Card Number: [Dropdown]
 Expiration Date: [Dropdown]

Use Procurement Card

Amount Summary

Total Amount: 4,000.00 USD

Select Lines To Display

Search for Lines

Line [Search] To [Search] Retrieve