Standard Operating Procedure

For:

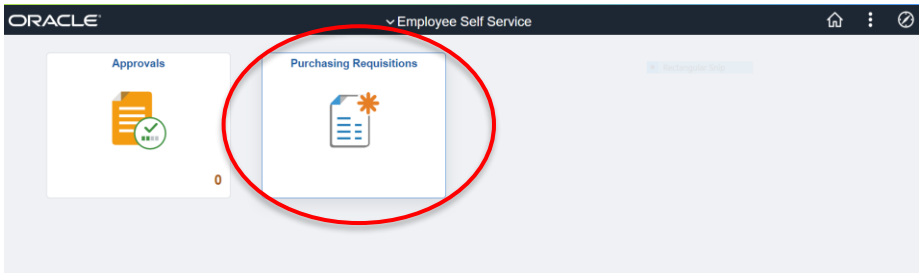
Creating a Requisition

IN

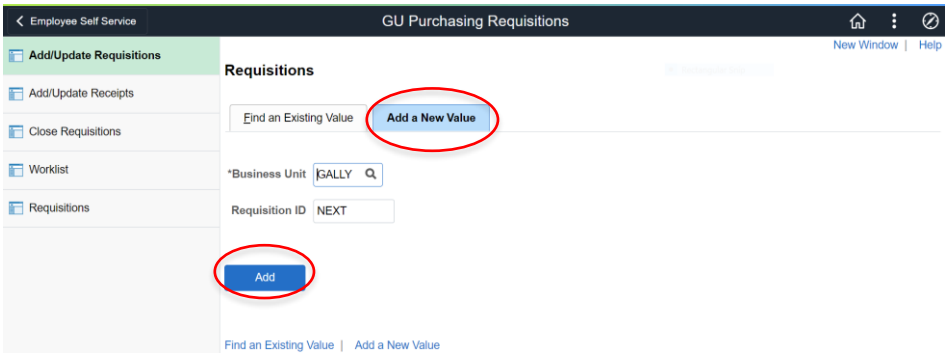
PEOPLESOFT

Last revised: March 22, 2021

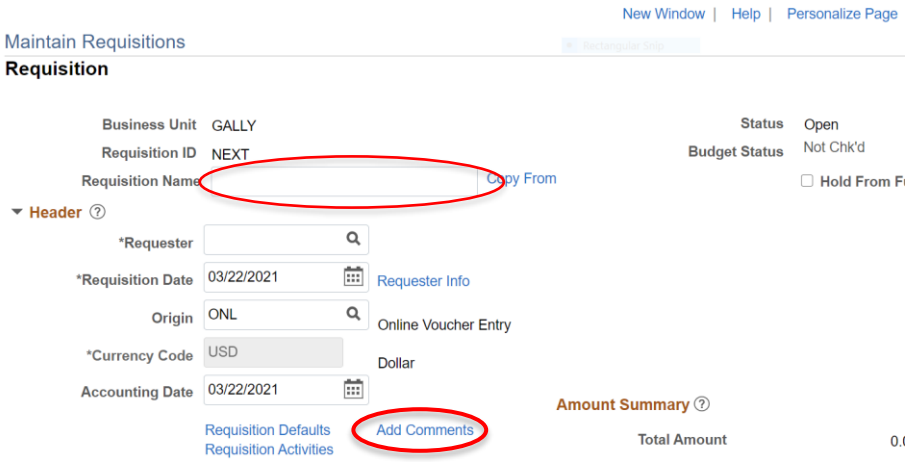
1. Click on box “**PURCHASING REQUISITION**”.



2. Click on the “**Add a New Value**” tab.
3. Click on the blue “**Add**” button.



4. In the “**Requisition Name**” box, type in the Vendor’s Name.
5. Click on “**Add Comments**” link (in blue), **Note:** once you have added comments it will change to “**Edit Comments**.”



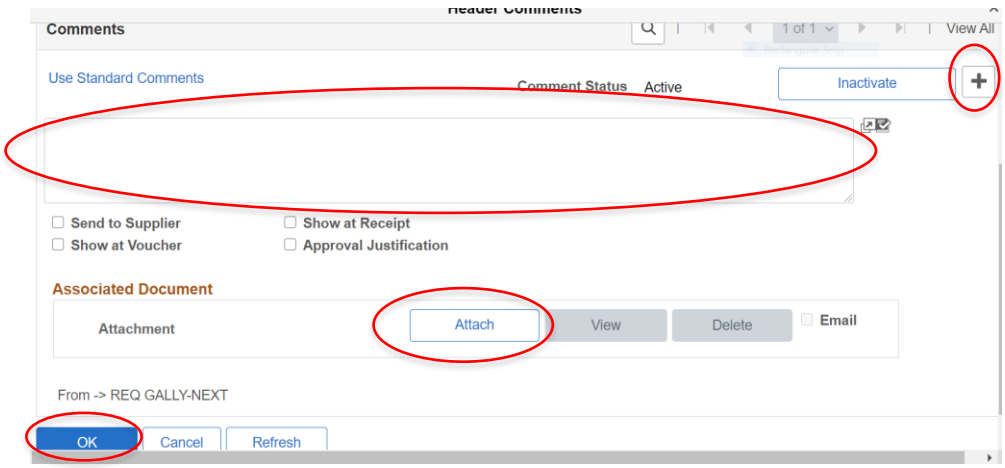
5. In the comment box, type the document description that you are attaching (example: Scope of Work, Proposal, Quote, Employee Vs Contractor Checklist, etc.)

Note: This area is also to put the POC – Point of Contact information, such as vendor contact name, address, email address, phone number if this information is not already available on the SOW, Proposal, or Quote.

Click "**attach**" and upload your document.

NOTE: If adding more than one document you MUST click on the "+" (plus sign) and a new blank window will appear to add another document. Follow step 5 again. You can only add one document per window.

Click "**ok**"



6. **DETAILS TAB**:

SPECIAL NOTE: Prior to entering information in the DETAILS line, if you know you will use more than one line, go to: (This step only applies if you are creating multiple lines, otherwise skip to the next step.)

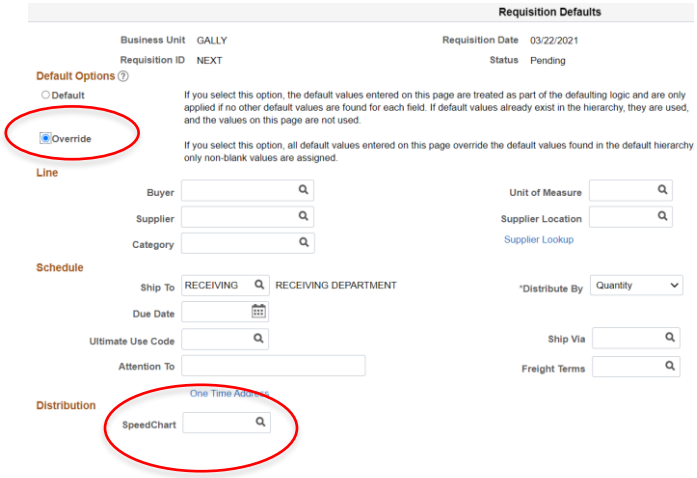
On Main page, click on **REQUISITIONS DEFAULTS**:

Click on "**Override**"

SPEEDCHART box, type in Department code and Object code (no space, no dashes)

Click "**ok**"

This should allow you to create as many lines as you need without having to go through the “green book/Defaults icon, Red Page/Schedule Icon, White Page/Distribution icon” process for each line.



OTHERWISE use the following steps and proceed:

Click the tiny arrow in the “**DESCRIPTION**” box to expand that window and then type a brief description of the service that will be provided by the vendor. (Example: Providing video creation services for the University Communications department.)

QUANTITY box (**IF** services) enter “1” (one). **IF** you are purchasing items then you would put the quantity of how many of that same item you are ordering.

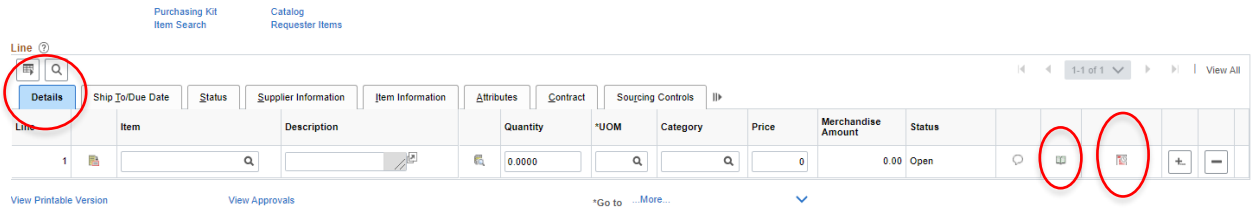
UOM box (Unit of Measure) if services, enter “LOT” if it is not a set amount of time, such as “year”, “month”, etc.

CATEGORY box enter the Object Code.

PRICE box enter the full cost of the services (if services) that will be provided. **Do not** enter the hourly rate. **IF** you are entering items to be purchased then you would enter the cost of 1 “one” item.

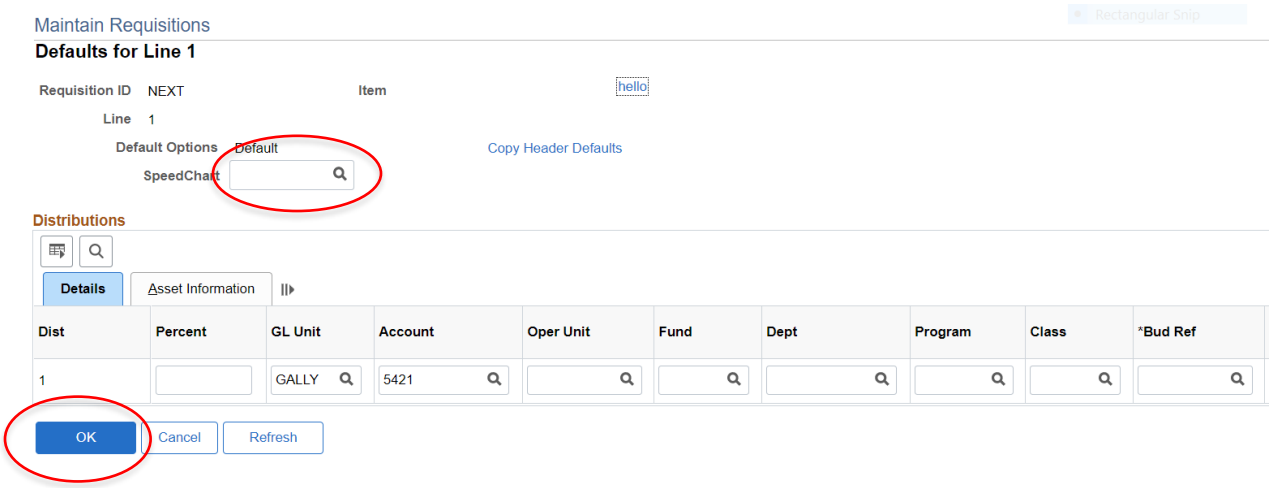
NOTE: The magnifying glass gives you a list of your options.

Click on the “**GREEN BOOK**” also called the “**DEFAULTS**” icon 



7. In the **SPEEDCHART** box type your department code and object code (no spaces, no dashes).

Click "**ok**"

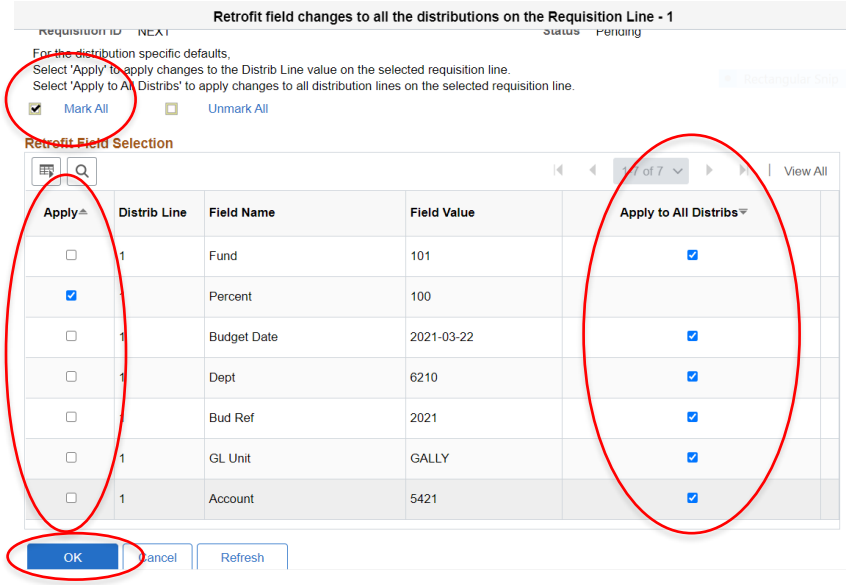


8. A "retrofit" window will appear, click on "Mark All" and the boxes in the left column (under "APPLY") will automatically be check marked.

Then go to the far right column and check the boxes under "Apply to All Distribs."

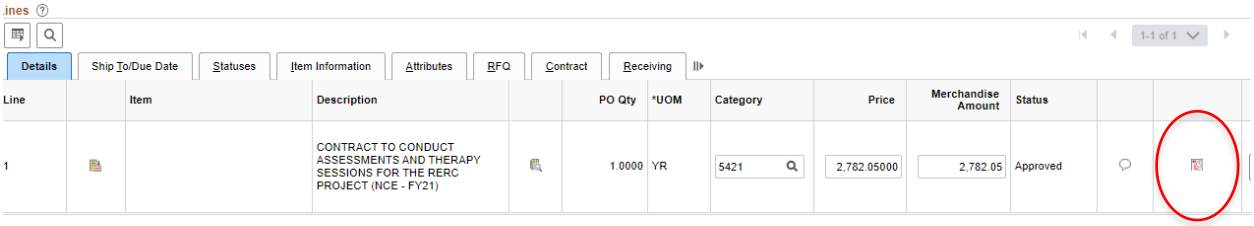
NOTE: You will notice that the lines for which you check the box will "uncheck" the box in the left column. That is what is should do.

Click "**ok**"

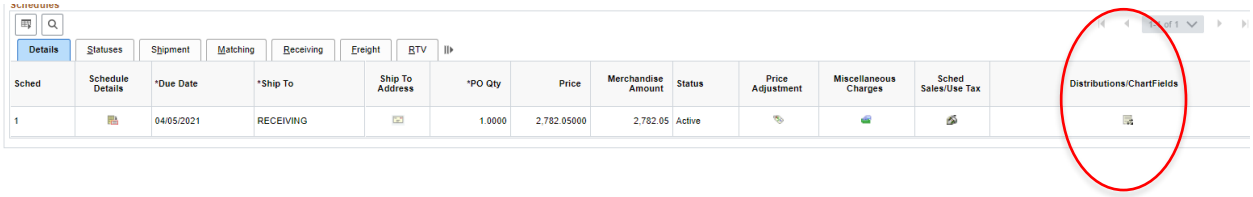


Once the window disappears it will take you back to the Details tab line with the green book (Defaults Icon), to the right of it…

9. Click on the "Red Page with a Clock" icon  also called the "Schedule" icon.



10. On this page you will ONLY click on the "White Page with Arrows" also called the "Distribution" icon 

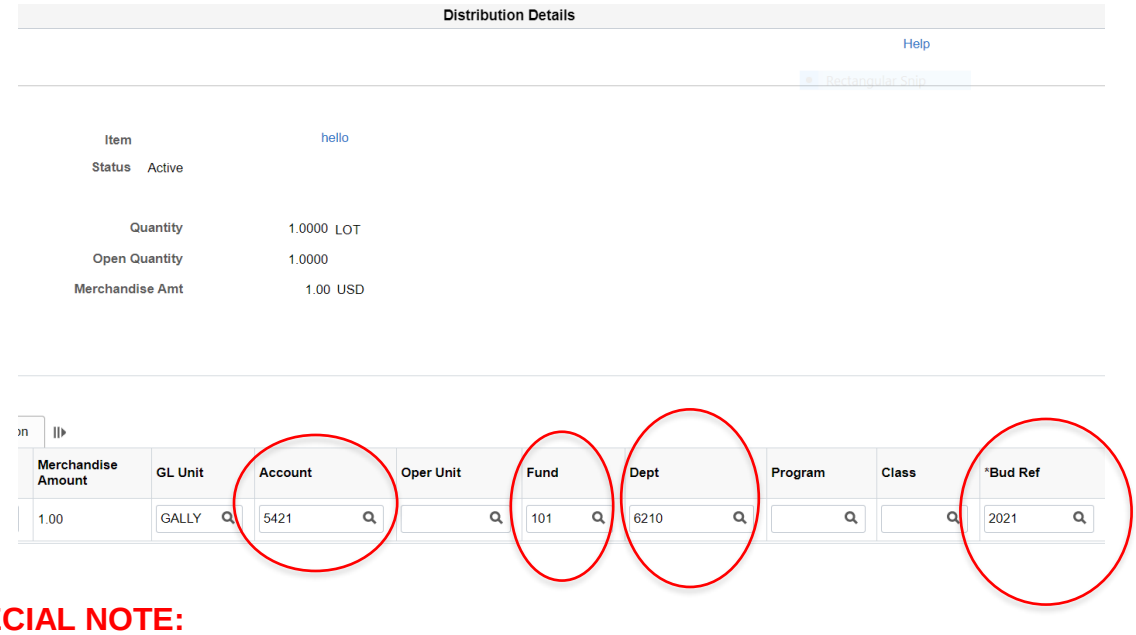


IMPORTANT: On this page there are 4 (four) boxes you need to be sure the information is there and correct:

1. Account box should have the Object Code
2. Fund box should have a 3 digit code

3. Dept box should have the department number
4. Bud Ref should have the current Fiscal Year/Budget Year

Click "**ok**"



SPECIAL NOTE:

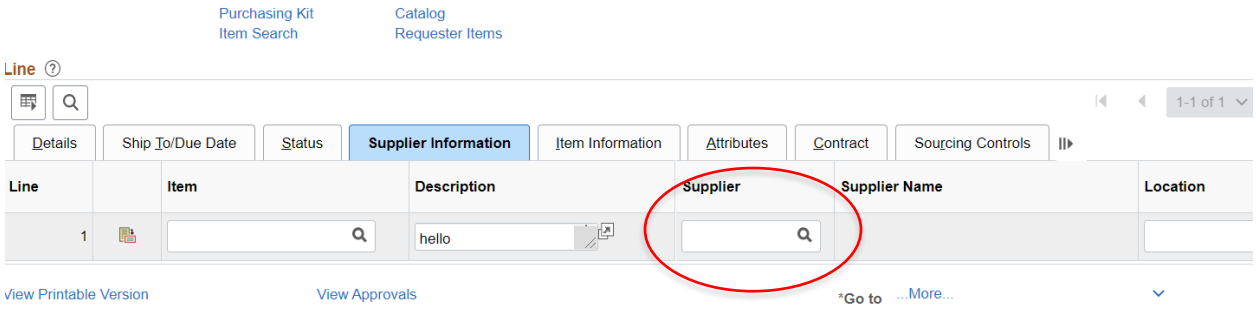
If you need to add extra lines for more services or (if purchasing items) more items then you can click on the "+" to the right on the DETAILS tab line on the main page. Then follow steps 6 through 10 again.

Next page, click "Return to Main Page"

Return to Main Page

11. SUPPLIER INFORMATION tab:

Click on the magnifying glass in the Supplier box.

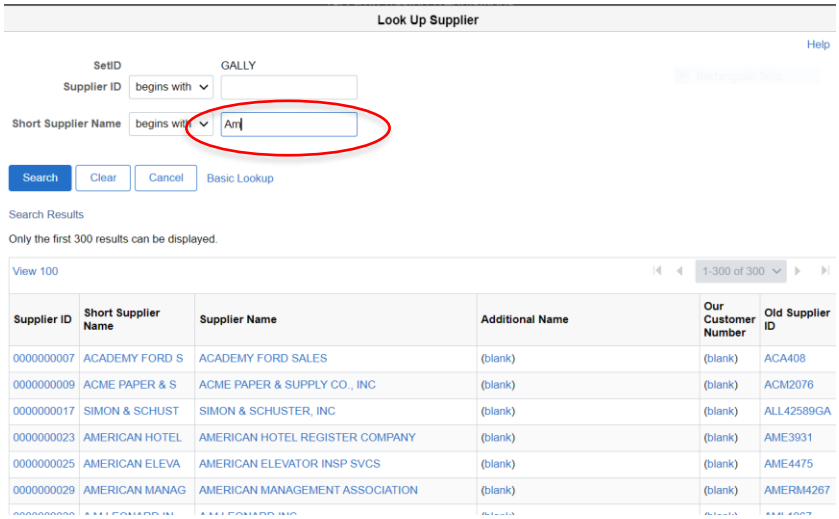


In the "**Short Supplier Name**" box, type in a partial name of the vendor.

Click “**Search**”

If the vendor name is in the system, click on the vendor name.
If the vendor name is NOT in the system then click the “x” to get out of that window.

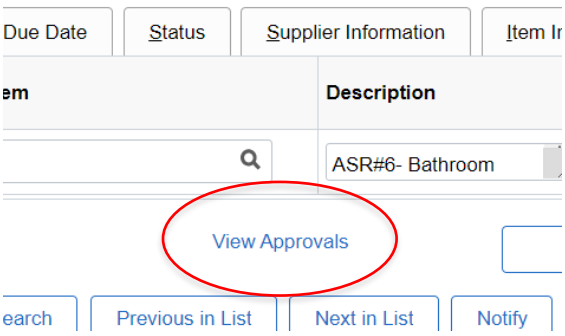
NOTE: You do not need to enter a Supplier Name if the Supplier is not in the system. Leave the box blank.



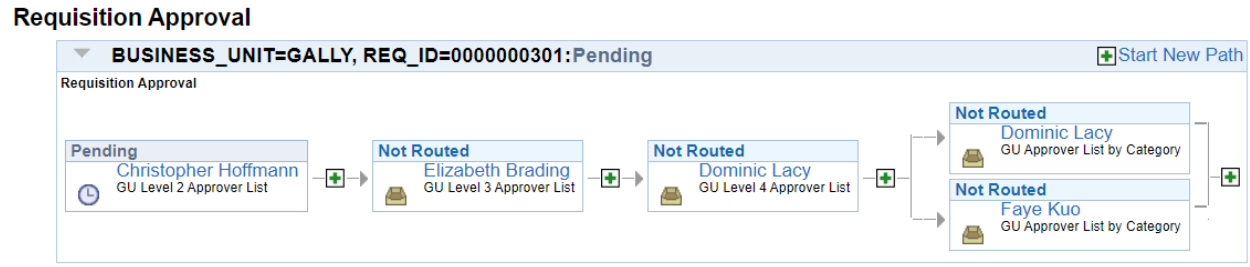
CLICK “SAVE”

The requisition will automatically be assigned a number once it is saved. That is the number you will use as a reference.

APPROVERS: To view the Approvers for your requisition, go to:
Click on “View Approvals”



You will be able to view the approval routing:



NOTE: Approvers receive an email alert that a requisition needs their approval.

IMPORTANT: Although BUH staff receive email alerts about requisition approvals, each department is responsible for reminding there BUH to approve requisitions.

GREAT JOB!

THE END

Please send all feedback to purchasing@gallaudet.edu