

# Create Requisitions

! This job aid is intended for staff with authority to create requisitions and procure goods and services for Lynn University. If you need to create requisitions for a new fiscal year that is not the current, please follow instructions in the [following job aid](#).

Requisitions create a hold on budgets and will be shown as committed on the cost center variance report.

## On this Job Aid:

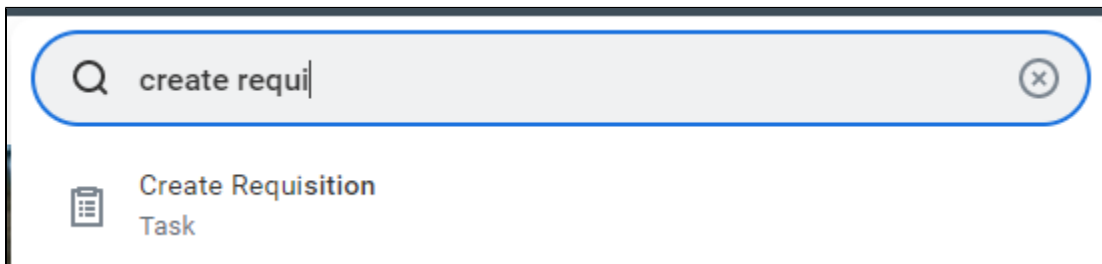
- [Create Requisitions](#)
  - [Add from Templates and Requisitions](#)
  - [View Requisitions](#)
  - [Create Requisition Template](#)
  - [Edit Requisitions](#)
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## Create Requisitions

To order job-related goods and services for Lynn University, you must create a requisition. You can create a brand new requisition from **Request Non-Catalog** Items or create a requisition from previous requisitions or a template.

Search and select Request Create Requisitions task

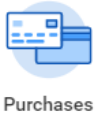
Search and select **Create Requisition**



! Note; If you search for requisitions, you may find tasks not related to procurement that refer to job requisitions.

or

1. Click the Purchases app



2. For brand new requisitions, under Actions, select Request Non-Catalog Items.

## Actions

Request Non-Catalog Items

3. The system will fill in default information for you. Confirm your **Company**, **Requester**, **Currency**, and optionally, **Requisition Type**. All items with a red asterisk are required.

### Request Non-Catalog Items

Company	*	x Lynn University ...	:
Requester	*	x Leo Lynn ...	:
Currency	*	x USD	:
Deliver-To		x Christine E. Lynn University Center	:
Ship-To	*	x Christine E. Lynn University Center 3601 N. Military Trail Boca Raton, FL 33431 United States of America	:
Requisition Type			:
Cost Center		x CC530 Student Involvement ...	:
Program			:
Project			:
Gift			:
Grant			:
Additional Worktags		x Fund: FD10 Without Donor Restriction	:

OK

Cancel

4. Under the Requisition type, select the appropriate requisition type.

	*	<input type="radio"/> Blanket PO <input type="radio"/> Requisition for Goods <input type="radio"/> Requisition for Services
Requisition Type		<input type="text" value="Search"/>

**i** A **Blanket PO** is an agreement arranged between an organization and a supplier to deliver goods or services at a predetermined price on a recurring basis for a specified time period (typically 1 year). This request assumes a series of recurrent invoices will be applied to the PO e.g. monthly or quarterly invoices).

5. Click Ok

6. Enter your requisition items, enter description, quantity, cost and unit of measurement. Please add any detail on the memo field.

Requisition Currency \* x USD

**Non-Catalog Request Type**

☒ Request Goods  
☐ Request Service

**Goods Request Details**

Item Description \* Paper

Supplier Item Identifier

Spend Category \* x Supplies - Materials

Supplier

Supplier Contract (empty)

Quantity \* 10

Unit Cost 20.00

Unit of Measure \* Each

Extended Amount 200.00


Memo



Add to Cart Continue Shopping Cancel

7. Click Add to Cart to include the item in the requisition. The system will move automatically to the next item,.

8. Keep adding items to your requisition if needed. Click the shopping cart item on the top right to checkout. In the orange circle, you will see the number of items in your requisition.

**My Cart** View Cart



	Paper	Quantity: 10	\$200.00
	glue	Quantity: 10	\$40.00

**Checkout** Total: 240.00 USD

9. Click Checkout

## 10. Review and enter final information

**Shipping Address**

Deliver To: Christine E. Lynn University Center  
 Ship-To Address: Christine E. Lynn University Center  
 2601 N. Military Trail  
 Boca Raton, FL 33420  
 United States of America

**Requisition Information**

Request Date: 04/03/2020

Currency: USD

Requisition Type:

High Priority: ☐

Expiring Date:

Submitted by: LYN LGW

Memo to Suppliers:

Internal Memo:

Submit Save for Later Continue Shopping

## 11. Scroll down to review the cart items

**Goods**

2 items

	Image	Item	Item Description	*Spend Category	*Quantity	Unit of Measure
+		Item Purchase Item	Paper	X Supplies - Materials	Quantity: 10	Unit of Measure: X Each
+		Item Purchase Item	glue	X Supplies - Materials	Quantity: 10	Unit of Measure: X Each

**Services**

0 items

	Image	Item	Description	*Spend Category	Extended Amount	Date
No Data						

**Attachments**

## 12. To add other items to the requisition, click the + sign on the Goods or Services area

**Goods**

2 items

	Item
--	------

## 13. Click the arrow next to Attachments and enter your quotes if available.

**Attachments**

Drop files here

or

Select files

## 14. Click Submit

## 15. Your request is completed and will be forwarded for budget check, approvals and procurement processing

## 16. Click Done

**You have submitted**  
Requisition: REQ-100000070,

**Up Next**

wd-support

Check Budget

Due Date 04/05/2020

**Add from Templates and Requisitions**

For items you constantly order, you can use a template or past requisition to create a new purchase request. Instructions to [create requisition templates](#) are detailed at the end of this job aid.

## 1. Click the Purchases app

**Purchases**

## 2. Under Actions, select Add from Templates and Requisitions

Add from Templates/Requisitions

## 3. Select your template or a past requisition to copy

Requisition Templates

1 item

Select	Name	Owned By	Date	Lines in Template
<input type="checkbox"/>	Information Systems		01/30/2020	0

Past Requisitions

1 item

Select	Requisition	Date	Memo to Suppliers	Internal Memo	Status	Lines in Requisition
<input type="checkbox"/>	REQ-100000017	02/05/2020			Successfully Completed	1

## 4. Complete your requisition following the previous steps.

**Add from Templates and Requisitions**

Company: X Lynn University

Requester: X Les Lynn

Company: X UNL

Deliver To: X Christine E. Lynn University Center

Ship To: X Christine E. Lynn University Center  
8001 W. Milton Trail Blvd. Room  
PL 33451 United States of America

Requisition Type:

Cost Center: X CENSO Student Involvement

Program:

Project:

GR:

Grant:

Additional Worktags: X Fund: FETD Without Donor Restriction

## View Requisitions

1. Search and Select My Requisitions

Q my requisitions

My Requisitions Report

OR

2. Click the Purchases app



Purchases

3. Under **View**, select **Requisitions**, enter parameters to display requisitions. Click OK

View

Requisitions

## My Requisitions

Company

X Lynn University ...
⋮

Requisition

Status

⋮

Requisition Type

⋮

Requesting Inventory Site

⋮

Document Date On or After

03 / 03 / 2020 📅

Document Date On or Before

MM / DD / YYYY 📅

Supplier

⋮

Spend Category

⋮

Item

⋮

Project

⋮

Purchase Order

⋮

OK
Cancel

Exclude Closed

☒

4. Your requisitions will be displayed in the matrix.

### Selection Criteria

Company Lynn University

Document Date On or After 03/03/2020

Exclude Canceled Yes

Exclude Closed Yes

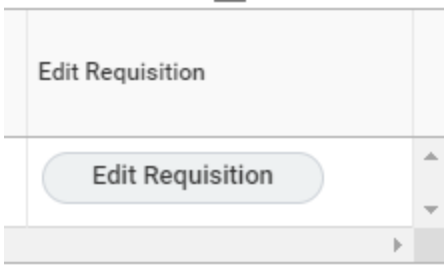
### Procurement Requisitions

1 item

Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	\$
<a href="#">REQ-100000070</a>			04/03/2020	240.00	USD	

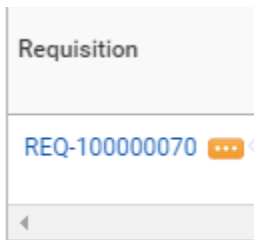
5. While your requisition is still in process (not yet converted into a PO), you can edit and make changes by scrolling to the right and click Edit Requisition.

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**Note**

ALL modified requisitions will be routed to the cost center manager for approval.

6. You can click on the requisition name or the related items icon next to the requisition number for more information.



7. After cost center manager approval, your requisition will move to the purchasing agent for PO creation.
8. On your requisition list, you will see the PO number and Request Status Successfully Completed.

Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	Suppliers	Purchase Orders	Request Status
REQ-100000070			04/03/2020	240.00	USD		PO-100000075	Successfully Completed

## Create Requisition Template

Requisition templates will help you expedite the procurement request for frequently requested goods and services.

1. Click the Purchases app



2. Under Action, select Create Template.



Create Template

- Enter your template details. Give your template a meaningful name, so it is easy to find later.

### Create Requisition Template

#### Template Details

Company \*

Requisition Template Name \*

Worker

Created On

Requisition Currency \*

Goods Lines Service Lines

Goods Lines 0 items

+	Item	Item Description	Sup

- Click + icon. Add items. Remember, every field with an asterisk is required.

+	Item	Item Description	Supplier Item Identifier	*Spend Category	Fulfillment Source	Supplier	Quantity
-	<input type="text" value="Ribbons"/>			Conferences	<input type="text" value="Purchase Order"/>		

- Click OK. Your requisition template is ready.

### Create Requisition Template

Ribbons (Active)

#### Template Details

Company

Requisition Template Name

Worker

Created On

Requisition Currency

Goods Lines Service Lines

Goods Lines 1 item

Item	Item Description	Supplier Item Identifier	Spend Category	Fulfillment Source
Ribbons			Conferences	Purchase Order

Done

- Click Done

## Edit Requisitions

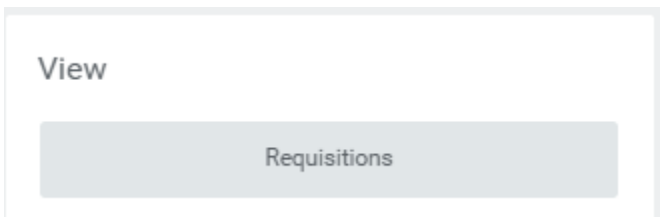
Requisitions that had not been converted into PO's can be edited to make corrections or add more items.

1. Click the Purchases app



Purchases

2. Under View, Select Requisitions

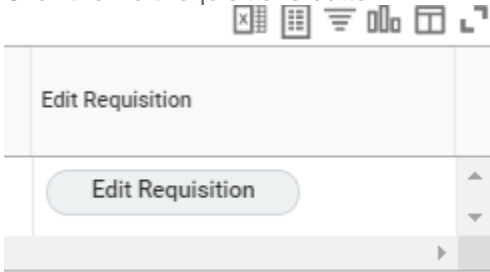


3. Enter any parameters to narrow down your selection or just click OK for all requisitions

**My Requisitions**

Company	<input type="text" value="x Lynn University ..."/>
Requisition	<input type="text"/>
Status	<input type="text"/>
Requisition Type	<input type="text"/>
Requesting Inventory Site	<input type="text"/>
Document Date On or After	<input type="text" value="06 / 01 / 2020"/>
Document Date On or Before	<input type="text" value="MM / DD / YYYY"/>
Supplier	<input type="text"/>
Spend Category	<input type="text"/>
Item	<input type="text"/>
Project	<input type="text"/>
Purchase Order	<input type="text"/>
Exclude Canceled	<input checked="" type="checkbox"/>
Exclude Closed	<input checked="" type="checkbox"/>
Include Job Requisitions	<input type="checkbox"/>
Job Profile	<input type="text"/>
Position	<input type="text"/>

- Click the Edit requisitions button



- The requisition will open and you can make any corrections.

 A screenshot of the "Edit Requisition" form. At the top is a blue header bar with the text "Edit Requisition". Below the header, the form is divided into sections:
 

- Shipping Address:** Includes fields for "Ship To Address" and "Ship To Address" with a dropdown for "Country".
- Requisition Information:** Includes fields for "Requisition Date" (07/01/2020), "Currency" (USD), "Credit Card", "Requisition Type" (Requisition for Goods), "Request Priority" (1), "Working Paper", "Submitter", "Address to Supplier", and "Internal Memo".
- Goods:** Includes a table with columns for "Item", "Description", "Quantity", "Unit", and "Price".

 At the bottom of the form are buttons for "Submit", "Save for Later", "Cancel Shipping", and "Cancel".

- Click Submit.

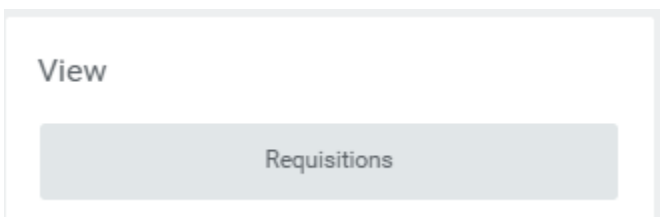
## Cancel Requisition

You can cancel any requisition that has not been turned into a Purchase Order.

- Click the Purchases app



- Under View, Select Requisitions



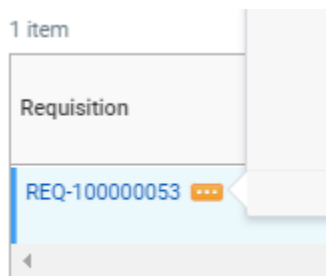
- Enter any parameters to narrow down your selection or just click OK for all requisitions

### My Requisitions

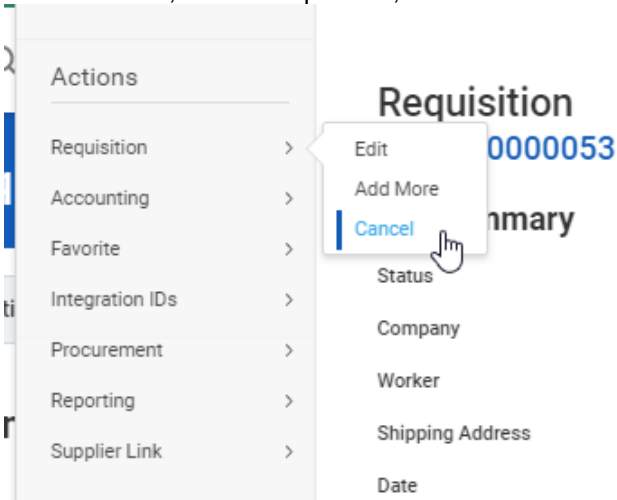
Company	<input type="text" value="Lynn University"/>
Requisition	<input type="text"/>
Status	<input type="text"/>
Requisition Type	<input type="text"/>
Requesting Inventory Site	<input type="text"/>
Document Date On or After	<input type="text" value="06 / 01 / 2020"/>
Document Date On or Before	<input type="text" value="MM / DD / YYYY"/>
Supplier	<input type="text"/>
Spend Category	<input type="text"/>
Item	<input type="text"/>
Project	<input type="text"/>
Purchase Order	<input type="text"/>
Exclude Canceled	<input checked="" type="checkbox"/>
Exclude Closed	<input checked="" type="checkbox"/>
Include Job Requisitions	<input type="checkbox"/>
Job Profile	<input type="text"/>
Position	<input type="text"/>

OK Cancel

4. Click on the elipsis (related actions) next to the requisition number



5. Under actions, select Requisition, then Cancel



## 6. Click Ok to confirm cancellation

Confirm Requisition Cancel

REQ-100000053 [Actions](#)

Budget Check Status Not Required on 07/01/2020

Please confirm you wish to cancel the Requisition below

Shipping Address

Deliver-To

de Hoernle Residence Hall

Ship-To Address

[de Hoernle Residence Hall 3601 N. Military Trail Boca Raton, FL 33431 United States of America](#)

Requisition Information

Request Date

07/01/2020

Currency

USD

Requisition Type

★ Requisition for Goods

High Priority

☐

Sourcing Buyer

(empty)

Submitted by

Mary Piret

Consolidate Requisitions on Purchase Orders

☐

Exclude Ship-To Address when Consolidating Requisition Lines

☐

Memo to Suppliers

(empty)

Internal Memo

(empty)

Goods Lines

1 item

Line	Item	Quantity	Unit of Measure
1		Requested	Each

OK

Cancel