Create Requisition for NEW FY in Current FY

This job aid is intended for staff with authority to create requisitions and procure goods and services for Lynn University and intended for requisitions created in a current fiscal year to be applied to a new fiscal year.

Search and select Create Requisition

Q	create requi	\otimes
Ē	Create Requisition Task	

OR

Click on Cost Center App



Cost Center

Select the Self Service tab

Under Requisitions and Invoices, select Create Requisition

Reports	Finance Worktag Reports	Self Service
Q	Requisitions and Invoices	
	Create Supplier Request	
	Create Supplier Invoice Request	
	Create Requisition	

Some information will be filled automatically depending on your cost center. Make sure you select the appropriate information.

Create Req	uisit	ion			?
Requester	*	Search	:=		
Company	*	× Lynn University …	≔		
Currency	*	× USD	≔		
Requisition Type	•		:=		
Deliver-To			:=		
Ship-To	*	× 3601 N. Military Trail Boca Raton, FL 33431 United States o America	f∷≣		
Cost Center		Şearch	:=		
Program			:=	:	
Project			:=		
Gift			:=		
Grant			=		
Location			:=		
Additional Work	tags	× Fund: FD10 Without Donor	:=	:	

Select requisition type or add requisition from template.



Fill out requisition header for service or goods and Add to Cart

Company Lynn University	Requester Therese Bolduc	Requisition Type Blanket PO
Requisition Currency *	× USD …	:=
Non-Catalog F	Request Type	
Request Goods		

Service Request Details

Request Service

Description *	Blanket purchase order test to cover the period from 07/01/21-06/30/22 Acct #456789
Spend Category	× Software Licensing
Supplier	× Accenta, Inc.
Supplier Contract	:=
Start Date	07/01/2021
End Date	06/30/2022
Extended Amount	3,000.00
Memo	test requisition
Add to Cart	Continue Shopping Cancel

Check out cart-u[date Request Date to 07/01/2021 (or date of next fiscal year)

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If you click **Submit**, the REQ will then go through the approval process in WD hierarchy. After the REQ is approved, it will move to the PO Process. <u>Only Submit REQ pre 7/1</u> if the PO must be created prior to 7/1 -otherwise hit <u>Save for Later</u>

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By choosing **Save for Later**, the REQ will be created and you will get the REQ number. The REQ is available to the Edit, Add More or Cancel

View Requi	isition REQ-1000348 🚥 🤇	Actions			
Company	Requester	Actions		Requisition	
Lynn University	Employee: Maria Bimonte-Yergi	Requisition	\rightarrow	Edit 1348	
		Budget Date	>	Add More	
 Shippin 	g Address	Favorite		nmary	
Deliver-To	Harid Conservatory	Integration IDs	>	Status	Draft
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Requisi	tion Information	Supplier Link	>	Worker	Maria Bimo
				Shipping Address	Harid Co

On 7/1 or after, go to the Purchases icon - View Requisitions

LYNN Q Search			
← Purchases			
	Actions	View	
	Request Non-Catalog Items	Requisitions	
	Connect to Supplier Website	Templates	

Your requisition will be there waiting for you to edit and Submit

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