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
    - Cancel Requisition

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.
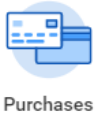
Search and select Request Create Requisitions task

Search and select **Create Requisition**
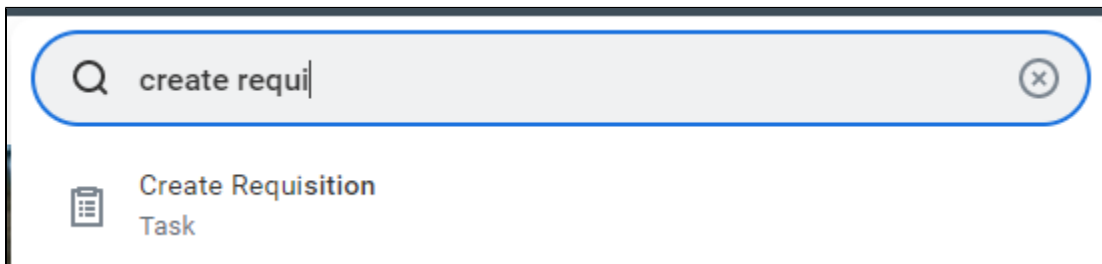
> ⊘ Note; If you search for requisitions, you may find tasks not related to procurement that refer to job requisitions.

or

1. Click the Purchases app

Purchases

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

OK   Cancel

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

* ○ Blanket PO

○ Requisition for Goods

○ Requisition for Services

Requisition Type   Search

> ⓘ 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 * ☒ USD

Non-Catalog Request Type

◉ Request Goods
◯ Request Service

Goods Request Details

Item Description	*	Paper
Supplier Item Identifier		
Spend Category	*	☒ 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

11. Scroll down to review the cart items

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

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

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
☐	Information SYstems		01/30/2020	0

Past Requisitions 1 item						
Select	Requisition	Date	Memo to Suppliers	Internal Memo	Status	Lines in Requisition
☐	REQ-100000017	02/05/2020			Successfully Completed	1

4. Complete your requisition following the previous steps.

View Requisitions

1. Search and Select My Requisitions

OR

2. Click the Purchases app

Purchases

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

My Requisitions

Company	✕ 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

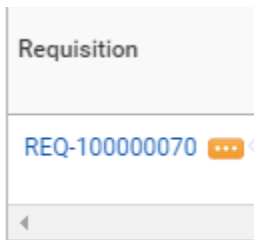| Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	S
REQ-100000070			04/03/2020	240.00	USD	

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.
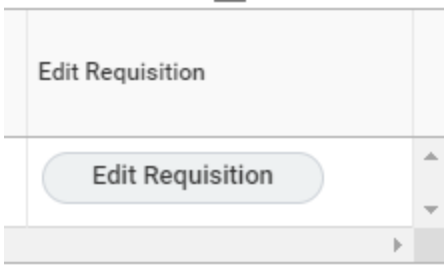
> **Note**
>
> ALI modified requisitions will be routed to the cost center manager for approval.

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
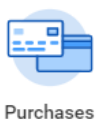
2. Under Action, select Create Template.

Create Template

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

Create Requisition Template

Template Details

Company	*	☓ Lynn University ···
Requisition Template Name	*	
Worker		Leo Lynn
Created On		04/03/2020
Requisition Currency	*	☓ USD

Goods Lines   Service Lines

Goods Lines 0 Items

⊕	Item	Item Description	Sup

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

Goods Lines 1 item

⊕	Item	Item Description	Supplier Item Identifier	*Spend Category	Fulfillment Source	Supplier	Quantity
⊖	☓ Ribbons ···			Conferences	☓ Purchase Order		

5. Click OK. Your requisition template is ready.

Create Requisition Template
Ribbons (Actions)

Template Details

Company	Lynn University
Requisition Template Name	Ribbons
Worker	Leo Lynn
Created On	04/03/2020
Requisition Currency	USD

Goods Lines   Service Lines

Goods Lines 1 item

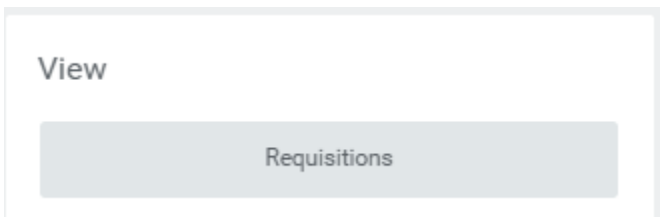| Item	Item Description	Supplier Item Identifier	Spend Category	Fulfillment Source
Ribbons			Conferences	Purchase Order

Done

6. 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

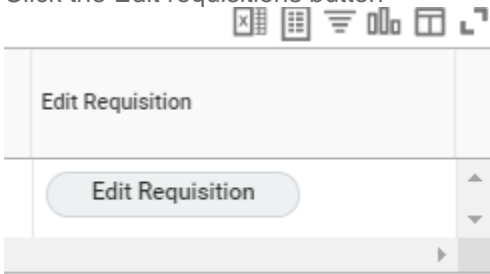
Purchases

2. Under View, Select Requisitions

View

Requisitions

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

My Requisitions

Company	✕ Lynn University ···
Requisition	
Status	
Requisition Type	
Requesting Inventory Site	
Document Date On or After	06 / 01 / 2020
Document Date On or Before	MM / DD / YYYY
Supplier	
Spend Category	
Item	
Project	
Purchase Order	
Exclude Canceled	☑
Exclude Closed	☑
Include Job Requisitions	☐
Job Profile	
Position	

OK   Cancel

4. Click the Edit requisitions button

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

6. Click Submit.
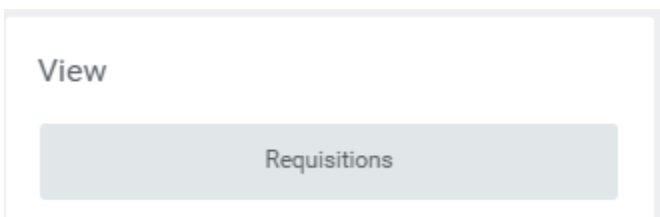
Cancel Requisition

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

1. Click the Purchases app

Purchases
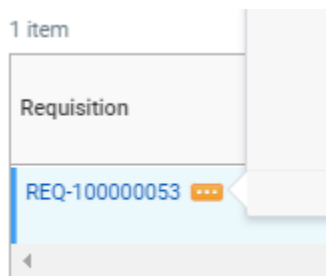
2. Under View, Select Requisitions

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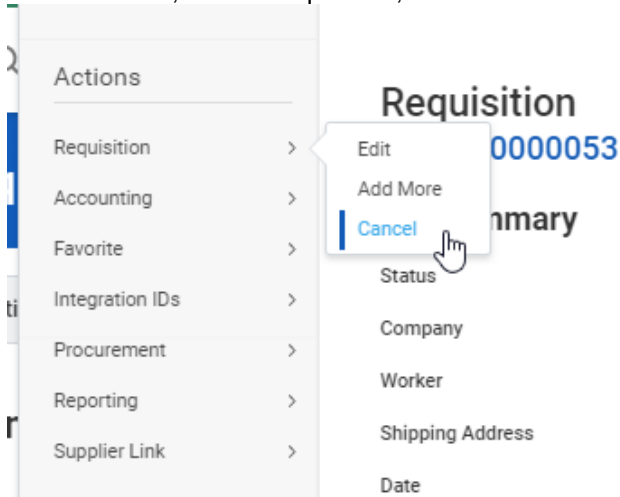
My Requisitions

Field	Value
Company	× Lynn University ···
Requisition	
Status	
Requisition Type	
Requesting Inventory Site	
Document Date On or After	06 / 01 / 2020
Document Date On or Before	MM / DD / YYYY
Supplier	
Spend Category	
Item	
Project	
Purchase Order	
Exclude Canceled	☑
Exclude Closed	☑
Include Job Requisitions	☐
Job Profile	
Position	

OK   Cancel

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

1 item

Requisition

REQ-100000053 ···

5. Under actions, select Requisition, then Cancel

Actions

Requisition >   Edit
Accounting >   Add More
Favorite >   Cancel
Integration IDs >
Procurement >
Reporting >
Supplier Link >

Requisition
0000053

nmary

Status
Company
Worker
Shipping Address
Date

6. Click Ok to confirm cancellation