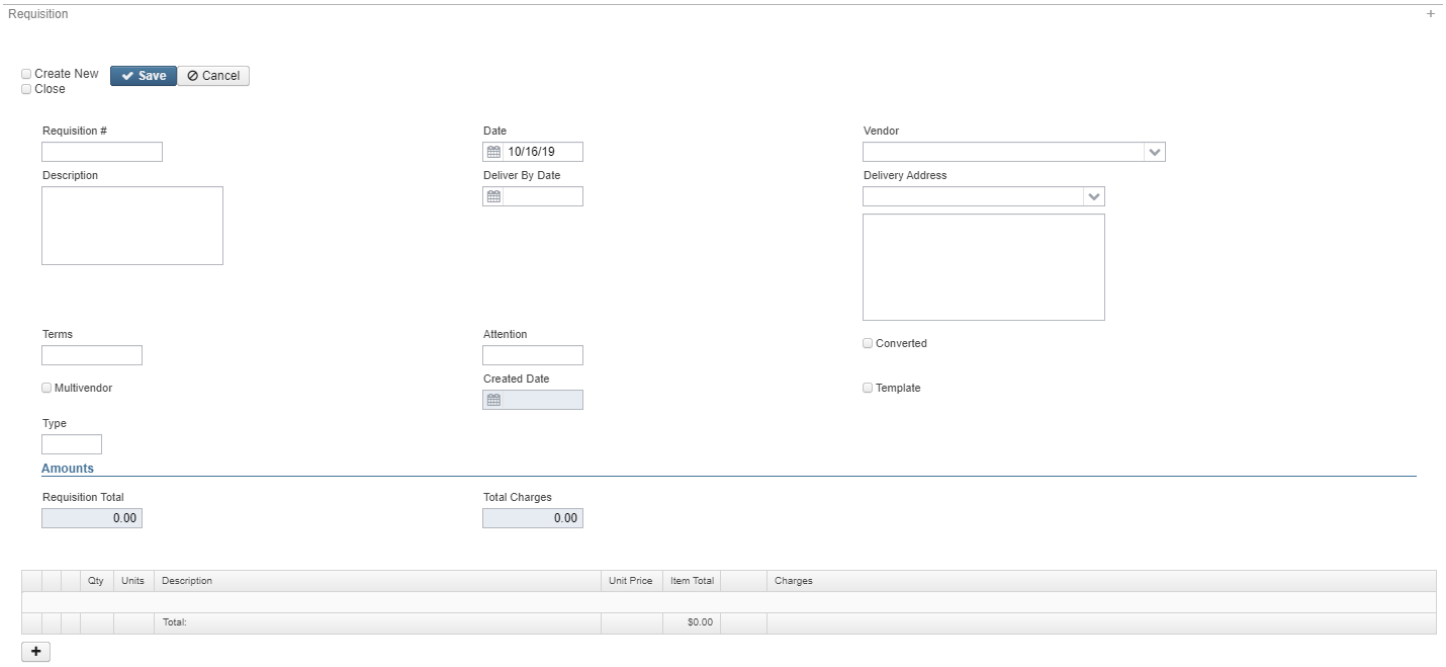
Create Requisitions



A requisition is a formal document requesting goods or services that may be converted to a purchase order once it has been approved by the appropriate parties.

1. From the Transaction menu select 'Requisitions'
2. Click

3. Check the 'Create New' box if you would like to enter multiple requisitions.
4. Check the 'Close' box if you would like the screen to close when you save your requisition.
5. Enter desired information into the Requisition

Requisitions by default do not require a vendor number. No vendor means the user hasn't assigned one yet or that it will be used as a non-vendor specific Requisition or it will be used as a 'multivendor' purchase order.

a. click on or to move item up or down in listing of line items.
b. click on the to add line items.
c. click on the to copy line items.
    i. The allows the user to split items by quantity and the allows the user to split by price

6. Click on to post the Requisition to the system, click on Cancel to not post the Requisition and return to the Requisition grid.

Search/View Requisitions

Requisition Grid allows the user to search for Requisitions that have been posted. Click on to view a particular Requisition.

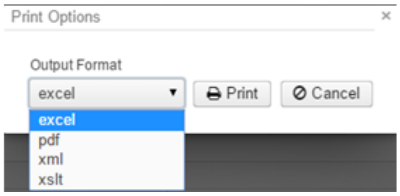
Edit Requisitions

New Requisitions from an open posting period that have not been converted to a purchase order may be modified. Only fields that are allowed to be edited will be displayed.

1. Search desired Requisition on grid
2. Click on to edit the Requisition
    a. Make desired changes
3. Click on Save to save desired changes to the Requisition, click on Cancel to not post the changes and return to the Requisition grid.

Print Requisitions

Click on to submit a copy of a posted Requisition in a desired output format. Users have the ability to print a single Requisition or a batch of Requisitions at one time.



Clone Requisitions

1. Select desired Requisition on grid
2. Click on to view the Requisition information
3. Click on Clone to clone the Requisition information into a new Requisition.
4. Make any desired changes and click on Save to post the Requisition to the system, or click on Cancel to not post the Requisition and return to the Requisition grid.

Delete Requisitions

The delete function may be used to delete any open requisition that is currently on the system. (One thing to note: To delete a requisition, you must open the same posting period as the month the requisition was created)

1. Search desired Requisition on grid
2. Click on to delete the Requisition.
3. Click on "Delete" to confirm the deletion.