Requisition

REQS

Electronic Document Guide
Requisition (REQS) Electronic Document

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Requisition E-doc Overview

The Requisition (REQS) e-doc is used to indicate items or services that need to be ordered through the Kuali for Stevens. It is the first step in the procurement process. The requisition collects information about the items or services the user wishes to have ordered, vendor (or possible vendors) to fulfill the order, delivery instructions, contact information and related accounting details.

When completing electronic requisition (REQS e-doc) through Kuali for Stevens, the user can:

1. Specify a Vendor,
2. Suggest a Vendor, or
3. Request Vendor Identification.

When Specifying a Vendor, the initiator must provide the quantity, item description, and unit cost when completing the required electronic requisition.

A purchase order will be created and transmitted to the vendor after approvals are complete.

- If the requisition is less than $5,000, it becomes an APO (automatic purchase order) after approvals are completed and is then transmitted to the vendor.

- If the requisition is in excess of $5,000, the Purchasing Office will manage it. This might include sourcing it (investigating possible vendors) and providing a contract manager who will create a PO (Purchase Order) based on the requisition.

When Suggesting a Vendor, or Requesting Vendor Identification the requisition initiator completes an electronic requisition by indicating a possible vendor or vendors, providing the quantity and item description. They do not have to provide a unit cost. It is recommended they provide the prospective budgeted amount for the item(s). The requisition will be assigned a contract manager by the purchasing department for managing.
Path to Get to A Requisition

This is the path to follow from the Departmental Menu of the Kuali Portal to get to the Requisition.

Don’t forget to check this space for timely messages and reminders!
REQS Document Layout
The REQS e-doc has two main parts:
1. The Document Header: this page
2. The Requisition Tabs: next page

The DOCUMENT HEADER displays:
- Document Number (Doc Nbr)
- Initiator
- Requisition #
- Status
- Date and Time Stamp (Created)
- Requisition Status

These six fields in the Document Header are automatically filled-in when you initiate (open) a new document.

The two Status fields will update based on actions taken by the initiator, as well as, approvers and reviewers, as the e-doc routes for approval.

The Requisition number will be system assigned as the e-doc routes for approval.

These three fields, Doc Nbr, Initiator and Created, cannot be changed or modified in any way.

It’s a good idea to write down the Doc Nbr on your original documentation so you can easily pull up the REQS when you are performing a search.

(please note: These materials were developed in a testing environment. In the production, the Main Menu tab has been replaced by two tabs: Departmental Menu and Central Menu as can be seen on the previous page. You will find all e-docs you need under the Departmental Menu.)

Doc Nbr in KFS:
In KFS each and every e-doc is assigned a unique number called the Document Number (Doc Nbr). It is indicated at the top right of all e docs when they are opened.

During the purchasing process (requisition, PO, receiving, payment request) a separate Doc Nbr will be assigned with the initiation of each e-doc, whether initiated by an individual or by the system.
**Requisition Number** is a KFS system assigned number, it is located at the top right of the e-doc, in the document header. KFS is the system of record at Stevens for all Requisitions. It is this Requisition number that will be referenced on the purchase order.

**KFS PO number** is a system assigned number; it is located at the top right of the e-doc in the P.O. document header.

**Status:** Refers to the processing status of the e-doc:

- INITIATED: the e-doc has been created, but not yet saved or submitted.
- SAVED: the e-doc has not yet been submitted. The work has been saved and the document can be closed. A saved document can be retrieved for completion at a later date.
- EN ROUTE: the e-doc has been submitted and has pending approval requests.
- APPROVED: the e-doc has been through all required levels of review and approval. It is now a valid business transaction in accordance with Stevens’ policies. There may be outstanding acknowledgement requests. Approved e-docs are posted to the general ledger in the next run of the batch posting process, generally a nightly event.
- DISAPPROVED: the e-doc has been disapproved at some point in the review and approval process. All parties who have previously approved or initiated the e-doc will be notified.
- FINAL: The e-doc has been through all levels of review and approval and has no open acknowledgement requests.
- CANCELED: the e-doc is denoted as void and should be disregarded. This status is applied to a document when an initiator creates an e-doc, but cancels it before submitting it for routing and approvals.

**Requisition Status:** Refers to the processing status of the Requisition that will be established by this e-doc.
Below the document header are the **Requisition** Tabs. To help with readability begin with all tabs collapsed by clicking **collapse all**.

<table>
<thead>
<tr>
<th>Tab Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Overview</td>
<td></td>
</tr>
<tr>
<td>Delivery</td>
<td></td>
</tr>
<tr>
<td>Vendor</td>
<td></td>
</tr>
<tr>
<td>Items</td>
<td></td>
</tr>
<tr>
<td>Capital Asset</td>
<td></td>
</tr>
<tr>
<td>Payment Info</td>
<td></td>
</tr>
<tr>
<td>Additional Institutional Info</td>
<td></td>
</tr>
<tr>
<td>Account Summary</td>
<td></td>
</tr>
<tr>
<td>View Related Documents</td>
<td></td>
</tr>
<tr>
<td>View Payment History</td>
<td></td>
</tr>
<tr>
<td>Notes and Attachments (0)</td>
<td></td>
</tr>
<tr>
<td>Ad Hoc Recipients</td>
<td></td>
</tr>
<tr>
<td>Route Log</td>
<td></td>
</tr>
</tbody>
</table>

**Tabs of the Requisition**

You can open each tab, one at a time, by clicking **show** on each individual tab.

Start with clicking **show** on the **Document Overview** tab.
Document Overview Tab shows what the Requisition e-doc is for; this is where you enter the purpose of this transaction. Note: Fields marked with an asterisk (*) are required and cannot be left blank.

**Description** is a required field that can hold up to 40 characters. Choose terminology that will make sense to you later when you perform searches. The system will precede your description with the word requisition, so consider that when using the forty characters to best refer to your transaction. This description will appear in the general ledger as the title for this transaction. (A KFS feature yet to be discussed is the Action List. This is a user specific list of the e-doc’s requiring their review, completion, approval or acknowledgement. The description will show on the Action List.)

**Explanation** is optional, but can be very useful to the initiator and the subsequent approvers as the document routes through the workflow approval process.

It is a good practice to save after completing the **Description** field.
Next is Financial Document Detail section of the **Document Overview** Tab. The required field here is **Year**. This will pre-fill with the current fiscal year. There is a drop down menu to choose the next fiscal year.

🎉 Remember to save after completing each tab!
Next is the Requisition Detail section of the Document Overview Tab.

The Chart/Org field will pre-fill SI for the Stevens Institute Chart code and the four-digit Org (organization code) with which the initiator is associated. To change the Org, you can click on the magnifying glass to invoke a search or type the code in if you know it.

Funding Source is a required field. It will pre-fill with INSTITUTION ACCOUNT. No action is required.

😊 Remember to save after completing each tab!
Here is a summary of the fields in the **Document Overview** Tab. In this chart, required fields are further marked by appearing in blue highlight.

<table>
<thead>
<tr>
<th>Field</th>
<th>Condition</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Required</td>
<td>Short statement of what the REQS is for. <em>This is what will display in the Action List, so be specific. Limited to 40 characters.</em></td>
</tr>
<tr>
<td>Org. Doc. #</td>
<td>Optional</td>
<td>Not required; optional number defined for interdepartmental purposes.</td>
</tr>
<tr>
<td>Explanation</td>
<td>Optional</td>
<td>Reasonable explanation of what the REQS is for; used to supplement Description.</td>
</tr>
<tr>
<td>Year</td>
<td>Required</td>
<td>The fiscal year in which the Purchase Order will be charged to your budget.</td>
</tr>
<tr>
<td>Total Amount</td>
<td>Display Only</td>
<td>Total dollar amount of the REQS; this field will auto fill from information provided in the Items tab.</td>
</tr>
<tr>
<td>Org./Chart</td>
<td>Required</td>
<td>This will pre-fill with the Organization to which the initiator has been assigned and SI, the Chart code for Stevens.</td>
</tr>
<tr>
<td>Funding Source</td>
<td>Required</td>
<td>This will pre-fill with INSTITUTIONAL ACCOUNT.</td>
</tr>
<tr>
<td>Payment Request</td>
<td>Optional</td>
<td>No action required on your part.</td>
</tr>
<tr>
<td>Positive Approval</td>
<td>Required</td>
<td></td>
</tr>
</tbody>
</table>

Remember to save after completing each tab!
Delivery Tab

Click on the Document Overview tab and on the next tab, Delivery.

Delivery Campus is a required field as noted by the *. This will be pre-filled with HB denoting the Hoboken campus. DC, denoting the Washington, DC location is also allowable.

Delivery To will pre-fill with the initiator’s name. This is a field that allows a look up as indicated by the magnifying glass, so you can change the information. Using the magnifying glass to fill this field will prefill E-mail and Phone Number as well.

E-mail fill in the e-mail address of the person noted in Delivery To. Using the magnifying glass to fill the Delivery To field will prefill this field as well.

Phone Number will pre-fill. Using the magnifying glass to fill the Delivery To field will prefill this field as well. You can change this manually by typing the information.

Notes on Final Delivery Address:

Delivery is the physical process of the items getting to your location.

1. Stevens Final Delivery Address is that location.
2. Not all buildings on campus can have deliveries made to them directly from vendors.*
   a. For those buildings that CANNOT have direct vendor deliver, the vendors deliver to Central Receiving at Howe.
   b. Requisitions for goods destined to these buildings will show the Howe address as the Receiving Address.
   c. Those goods will be delivered to the Final Delivery Address by Stevens.

* A list of buildings that can have vendor direct delivery is located on the last page of this guide.

You will soon become familiar with the four alpha character building code for your location. Until then start by filling in the Building name as a wild card, that is start with an asterisk (*), then type the first few letters in your buildings name and end with an asterisk (*). This tells the system you want to return all buildings with a name that contains that string of letters.
In the example below the search was for Babbio using wild card *bab*.

Click search.

One item retrieved.

Click on return value.

Based on the building code the following fields will be filled in with the return value function.

- Address 1
- City
- State
- Postal Code
- Country

If for some reason the wrong building was chosen, repeat the look up by clicking on the magnifying glass by building, pick the correct building and click on return value.
If you will do most of your’re ordering for one building you can set that as the default building. Note the message when that default is set.

The Room is a required field denoted by the asterisk (*). Click on the magnifying glass to look up the room number or type it in if you know it. If you use the lookup you can click return value as you did in the building look up. Here is the Room Lookup screen.
Clicking **search** here will return all the rooms in that building. The results of the search are shown below.

Note only a partial list displays. Click on the page numbers or next/last to display the additional rooms from the results.
To refine the search you could fill in additional lookup/search criteria. In this example, the search is for a classroom, using the wild card *class* in Building Address Description.

The results are narrowed to 43 choices.

In this example return value was chosen for room 1104.
**Date Required** can be filled in by clicking on the calendar icon and choosing the date by which you will need to receive the item(s) you are requisitioning. This field is not required. This information is not printed on the PO therefore the vendor does not see it.

After you **click on the date** of your choice, it will fill in. In this example September 30, 2013 was chosen as the Date Required. To choose a different date, click on the calendar again and repeat the process. Use this calendar to avoid formatting issues.

If you have indicated a Date Required you will need to fill in the Date Required Reason. Note there is a drop down with these choices:

- ESTIMATED DATE
- MUST RECEIVE
- QUOTED DELIVERY

Choose the one that applies to your situation.

😄 Remember to save after completing each tab!
Recall this information on Receiving:

Receiving has two meanings within the context of purchasing at Stevens.

1. Central Receiving accepting delivery for the campus buildings that cannot have delivery directly from vendors.
2. The process of indicating the delivered order’s completeness.

Complete Delivery Instructions if any particulars need to be noted. This will be for Stevens use only as this information does NOT carry forward to P.O. The vendor will not see this information. Please note the field is limited to 100 characters.

Receiving Address will need to be completed if Central Receiving is required. Click on the magnifying glass to search and return the value.

Shipping Address Presented to Vendor. Click on the radio button to indicate which address should be presented to the vendor. This will default to Final Delivery Address. Click the radio button on Receiving Address if Central Receiving is required.

😊 Remember to save after completing each tab!
Vendor Tab

Click on the Delivery tab and on the next tab, Vendor.

In this example the user would like to choose Paterson papers. A vendor lookup was done by clicking on the magnifying glass, typing "pat*" in the Vendor name field and clicking search.

Note if you do not use the asterisks you must type the name exactly as it appears in the file...capitalization, spelling, spacing, etc. The recommendation for a best practice is to type three or four letters you know for sure are in that order in the vendor’s name, surrounded by an asterisk on each end.

Note the results on the next page.
From this screen, click return value to bring the vendor information forward to the REQS e-doc.

By using the Vendor Lookup and returning the value most of the fields in the Vendor Address section of the Vendor tab have been pre-filled.

The Attention field is optional, but could be used if there was an individual at Paterson Papers that was a contact person for Stevens.
The **Vendor Info** tab is not required. If no vendor is indicated the e-doc routes to purchasing for vendor assignment.

Please do not use this section of the Vendor tab.

Remember to save after completing each tab!

**Items Tab**

Click 

on the **Vendor** tab and

on the next tab, **Items**.
On the Items tab you indicate the specific items you wish to purchase. For purposes of this example only small sections of the Items tab will be shown.
Item Line # will auto fill once you press add when you complete the fields for each item.

Item Type is a required filed as indicated by the asterisk (*). The drop down reveals two choices: QUANTITY and NO QUANTITY.

UOM, indicated Unit of Measure. A lookup on this field by clicking on the magnifying glass AND then clicking search with no limiting criteria results in a list of the 56 valid units of measure, a portion of which are shown below.
In the example below, we will return value on BX as the paper we are ordering comes by the box.

We also filled in **Description** and **Unit Cost**.

Indicate the **Catalog #** if you have one.

**Commodity Code** is a characterizing of the various items Stevens purchases that require additional approvals and special handling due to the nature of the items.

Below are the results of a **Commodity Code Lookup** with no limiting criteria prior to clicking the **search** button.

Note there are five Commodity Codes. The purchase in our example does not fall into one of these categories so we will leave the Commodity Code field blank.

Since our items do not fall into a Commodity Code we will press **cancel**. If they did come under one of the Commodity Codes we would press return value and that code would populate the field in the Items tab.
Here we are back to the Items tab.

Description is a required field. Provide a brief description of the item. By clicking on the pencil icon, the user will have a larger area for adding text. This will allow the writer and reader of the Description to see the text in its entirety without scrolling in the small test box. Note you are limited to 254 characters of text. This information is sent to the Vendor.

Unit Cost is required field this can be an actual or estimated based on vendor specification.

Extended Cost this will auto-fill when this line item is added, based on quantity and unit cost

Tax Amount not used at SIT

Restricted not used at SIT

Assigned To Trade In not used at SIT

Action: after you have completed entering information in Items, to register the information click the add button. You will see the line will be assigned a line item number and a blank line will present ready for you to order a second item.

If you are NOT responsible for indicating the account number, hide the items tab and proceed to the section labeled Notes and Attachments in this guide.

When adding the accounting information you can assign the account numbers in two ways:
1. Click setup distribution and assign one or several account numbers to the total order by percentage of dollars
2. Click show on each item’s Accounting Lines tab and fill in the accounting by item.
Accounting Lines tab
- The Chart is always SI for Stevens. This field will auto-fill after the account number is provided and you tab out of the account number field.
- Fill in the account number or choose return value after conducting a search using the magnifying glass. Tab to the next field. *Note the Chart field has now auto filled with SI.*
- Sub-Account is an optional field. Tab to the next field.
- Fill in the Object code or choose return value after conducting a search using the magnifying glass. Tab to the next field.
- Sub-Object is an optional field, as are Project and Org Ref Id. Tab to the Percent field.
- Fill in the percentage of the line that will be paid from this account. If just one account will be used for all the items, indicate 100 (percent).

If there are items that will be paid from a different account number or object code, you can open the accounting lines for those items and change the accounting line

**Hide** the Items tab.

Capital Assets Tab
Please see the Capital Assets Module guide for the details of completing this tab.
Payment Info Tab
Complete the Payment Info Tab if there will be recurring payments. From the drop down choose the payment schedule:

Use the calendars to provide the Begin/End Dates.

Additional Institutional Info Tab
This tab is requires some basic information and will pre-fill or default as indicated below:

Method of PO Transmission is ELECTRONIC.
Cost Source is ESTIMATE.

If there is a firm limit on the amount of the PO indicate that in this field.

Requestor Name, Phone and Email fields should contain the contact information for the person with knowledge of the details of the items ordered. This will be the person the Purchasing Office will contact with questions. Edit and complete these fields to provide all the contact information.

Be sure to complete all required fields, those noted with an asterisk (*).
The following tabs are for information. With these tabs you can see the subsequent purchase orders that were issued, and also the payment history. Opening the tab will display all of the related information for this requisition.

**Account Summary**

**View Related Documents**

**View Payment History**
### Notes and Attachments Tab

This area is used to provide supplementary documentation regarding the requisition. Documentation examples might include: a letter of request from a faculty member, copy of a catalogue page or vendor correspondence. You can either type a note into the Note Text box by itself, or type a note and attach a file. **This information does not go to the vendor.**

Although the Note field is marked with an asterisk (*), it is only required to be filled in when you attach a file.

Click **add** when you have completed the Notes and Attachments tab.

```plaintext
<table>
<thead>
<tr>
<th>Notes and Attachments (0)</th>
<th>hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes and Attachments</td>
<td></td>
</tr>
<tr>
<td>add:</td>
<td></td>
</tr>
<tr>
<td>Notes Text</td>
<td></td>
</tr>
<tr>
<td>Attached File</td>
<td></td>
</tr>
<tr>
<td>Actions</td>
<td></td>
</tr>
</tbody>
</table>
```

Remember to save after completing each tab!

Close the **Notes and Attachments tab** by clicking **hide** on that tab.

### Ad Hoc Recipients Tab

Open the **Ad Hoc Recipients Tab** by clicking on **show** on that tab.

```plaintext
<table>
<thead>
<tr>
<th>Notes and Attachments (0)</th>
<th>hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes and Attachments</td>
<td></td>
</tr>
<tr>
<td>Ad Hoc Recipients</td>
<td></td>
</tr>
<tr>
<td>Person Requests:</td>
<td></td>
</tr>
<tr>
<td>Action Requested:</td>
<td></td>
</tr>
<tr>
<td>Person:</td>
<td></td>
</tr>
<tr>
<td>Ad Hoc Group Requests:</td>
<td></td>
</tr>
<tr>
<td>Action Requested:</td>
<td></td>
</tr>
<tr>
<td>Namespace Code:</td>
<td></td>
</tr>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Actions</td>
<td></td>
</tr>
</tbody>
</table>
```

A user can enter names into **Ad Hoc Recipients** to route the document to individuals outside the established routing for approval (we will look at approvals required in the Route Log tab).

Under **Action Requested** there are three choices: APPROVE, FYI and ACKNOWLEDGE

- **APPROVE** requires the named person to review and approve the document.
- **FYI** does not require any action by the recipient.
- **ACKNOWLEDGE** requires the recipient to open the e-doc. It does not delay the processing. However, the document will never reach its status of FINAL until the recipient asked to **ACKNOWLEDGE** has opened the e-doc.

Remember to save after completing each tab!
Route Log tells you where a document is in the workflow process. This is a helpful place to come back and see whether your transaction is complete. After submitting, it should look similar to the following.

Submitting the Requisition

When you are ready to submit the REQS, it first must be calculated. Click calculate and then click the submit button.
Shopping Catalogs via Steven$mart
This is the path to follow from the Main Menu of the Kuali Portal to get to Steven$mart.

Don't forget to check this space for timely messages and reminders!
Please take note of what this environment looks like, it is important for the user to know when they are in KFS, when in Steven$mart and when they have punched out and are shopping in the catalogues of one of the approved vendors.

Click on any vendor icon to browse or shop.

To get back to the Steven$mart home page, (where you see the vendor choices), from any vendor site, click cancel punch-out, which is located in the upper right of each of the vendors’ home pages.

If you want to go back into KFS without shopping, click
Overview of the Shopping on the Vendor’s Site

If you have ever shopped online, this should act like most online shopping. You can search the catalog and add items to the shopping cart. You can review your cart and when you are done and satisfied with your selections check out and submit the cart to KFS. When your cart is returned to KFS, it creates a REQS e-doc, many of the fields will be prefilled based on the vendor’s site where you shopped. These tabs should all be reviewed for accuracy. The e-doc is then submitted and will route according to workflow for the completion of accounting lines and various reviews and approvals.

Example: Shopping Catalogs by Punching Out

Click on the Staples link.
Note the screen indicates where you are.

In our example, we are going to shop for three wooden bookcases of varying types.

What a user does is pick out the items needed and fill the shopping cart within the vendor’s site (just like any on-line shopping you may do personally!). When you are finished, the cart needs to be brought back to Steven$mart, then to KFS for processing.

Our intent is not to take you step by step through on line shopping, but rather to show you how to get your shopping cart from Staples back to Steven$mart and into KFS for completing the requisition.
We have found bookcases, so now we will look at the wooden ones we need.

We find these items as we shop and will fill our cart.
Our order is being tracked here as we choose our items. We will click **Submit** and review the order.

![Image of an online shopping screen]

The resulting screen is below. We will again choose **Submit**.

![Image of the resulting screen]
We are now in Steven$mart.

Note we selected 3 bookcases, two separate item types.

We will Return the Cart to KFS.

Note that you will be back in an e-doc:

😄 Remember to save after completing each tab!
The next screen you will see is a Requisition e-doc in KFS, with the Vendor and order information brought in from Steven$mart. Note it comes in as a saved document with an assigned Requisition #.

Now proceed through the tabs in the same way as a REQS e-doc that did utilize Steven$mart (the example in the first part of this reference packet).

Click collapse all. We will show and hide each tab individually to look at the completed information.
Click **Show** on the **Document Overview** tab.

Note the **Description** field is completed with the Vendor’s name. You can change the year and also add an explanation if desired.

Click **Hide** on the **Document Overview** tab.

Click **Show** on the **Delivery** tab. On the **Delivery** Tab you will need to complete the fields with asterisks (*).

This screen has the Delivery Information completed. Note since Kidde can accept direct vendor delivery the Final Delivery Address radio button is chosen.

Click **Hide** on the **Delivery** tab.
Click **Show** on the **Vendor** tab.

All information is completed when the information was returned from Stevens$mart. You could add Notes to the Vendor if you wish.

Click **Hide** on the **Vendor** tab.

Click **Show** on the **Items** tab.

When adding the accounting information you can assign the account numbers in two ways:

1. Click **setup distribution** and assign one or several account numbers to the total order by percentage of dollars
2. Click **show** on each item’s Accounting Lines tab and fill in the accounting by item.

In our example, we will furnish the accounting information by distribution as all items on the order will be charged to the same accounts and object codes.
We will complete this Accounting line; the only field that is different is the Percent field. Here we will indicate 100 (percent) as we are charging it to one account.

We complete the accounting and click **distribute to items** rather than **add**.

(If we were splitting the distribution between two accounts we would type in 50, indicating 50%, click **add**. Enter the second account, type 50, indicating 50%. We would then click **distribute to items**.)

Click **Hide** on the Items tab.

Remember to save after completing each tab!
The **Capital Assets** Tab. Please see the Capital Assets Module guide for the details of completing this tab.

![Capital Assets Tab](image)

Complete the **Payment Info** Tab if there will be recurring payments. From the drop down choose the payment schedule:

- FIXED SCHEDULE, FIXED AMOUNT
- FIXED SCHEDULE, VARIABLE AMOUNT
- VARIABLE SCHEDULE, VARIABLE AMOUNT

Use the calendars to provide the Begin/End Dates.

The **Additional Institutional Information** tab is requires some basic information and will pre-fill or default as indicated below:

- **Method of PO Transmission** is ELECTRONIC.
- **Cost Source** is ESTIMATE.
- If there is a firm limit on the amount of the PO indicate that in this field.
- Requestor Name, Phone and Email fields should contain the contact information for the person with knowledge of the details of the items ordered. This will be the person the Purchasing Office will contact with questions. Edit and complete these fields to provide all the contact information.

*Be sure to complete all required fields, those noted with an asterisk (*).*
The following tabs are for information. With these tabs you can see the subsequent purchase orders that were issued, and also the payment history. Opening the tab will display all of the related information for this requisition.

**Account Summary**

**View Related Documents**

**View Payment History**

---

**Notes and Attachments** is used to provide supplementary documentation regarding the requisition. Documentation examples might include: a letter of request from a faculty member, copy of a catalogue page or vendor correspondence. You can either type a note into the Note Text box by itself, or type a note and attach a file. *This information will not be sent to the Vendor.*

*Although the Note field is marked with an asterisk (*), it is only required to be filled in when you attach a file.*

Click **add** when you have completed the Notes and Attachments tab.

Remember to save after completing each tab!

Close the **Notes and Attachments tab** by clicking **hide** on that tab.
Open the **Ad Hoc Recipients** tab by clicking on **show** on that tab.

A user can enter names into **Ad Hoc Recipients** to route the document to individuals outside the established routing for approval (we will look at approvals required in the Route Log tab).

Under **Action Requested** there are three choices: APPROVE, FYI and ACKNOWLEDGE

**APPROVE** requires the named person to review and approve the document.

**FYI** does not require any action by the recipient.

**ACKNOWLEDGE** requires the recipient to open the e-doc. It does not delay the processing. However, the document will never reach its status of **FINAL** until the recipient asked to ACKNOWLEDGE has opened the e-doc.

![Smiley face](image) **Remember to save after completing each tab!**
Submitting the Requisition

When you are ready to submit the REQS, it first must be calculated. Click calculate and then click the submit button.

Note the message of successful submission and the ENROUTE Status.
Vendor Delivery Address

These are the campus addresses to which a vendor can deliver. The Howe Center is the delivery point (central receiving) for all buildings not listed.

<table>
<thead>
<tr>
<th>Building Name</th>
<th>Street Address</th>
<th>Building Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Howe</td>
<td>1 Castle Point</td>
<td>HOWE</td>
</tr>
<tr>
<td>EAS</td>
<td>24 5th St</td>
<td>EDWI</td>
</tr>
<tr>
<td>Carnegie</td>
<td>519 Hudson St</td>
<td>CARN</td>
</tr>
<tr>
<td>Lieb</td>
<td>531 Hudson St</td>
<td>LIEB</td>
</tr>
<tr>
<td>Burchard</td>
<td>524 River St</td>
<td>BURC</td>
</tr>
<tr>
<td>McLean</td>
<td>507 River St</td>
<td>MCLE</td>
</tr>
<tr>
<td>Babbio</td>
<td>525 River St</td>
<td>BABB</td>
</tr>
<tr>
<td>Morton</td>
<td>601 River St</td>
<td>MORT</td>
</tr>
<tr>
<td>Peirce</td>
<td>607 River St</td>
<td>PEIR</td>
</tr>
<tr>
<td>Kidde</td>
<td>615 River St</td>
<td>KIDD</td>
</tr>
<tr>
<td>Nicoll</td>
<td>621 River St</td>
<td>NICO</td>
</tr>
<tr>
<td>Davidson</td>
<td>707 Hudson St</td>
<td>DAVI</td>
</tr>
<tr>
<td>Facilities - Griffith</td>
<td>600 Sinatra Dr</td>
<td>GRIF</td>
</tr>
</tbody>
</table>