



Types of Requisitions: Requisition

There are several different ways to create requisitions using the **Req Type Requisition** in eProcurement: **Special request, State Catalog, and WEB Punchout**. This job-aid shows all three; the navigation for all three is the same.

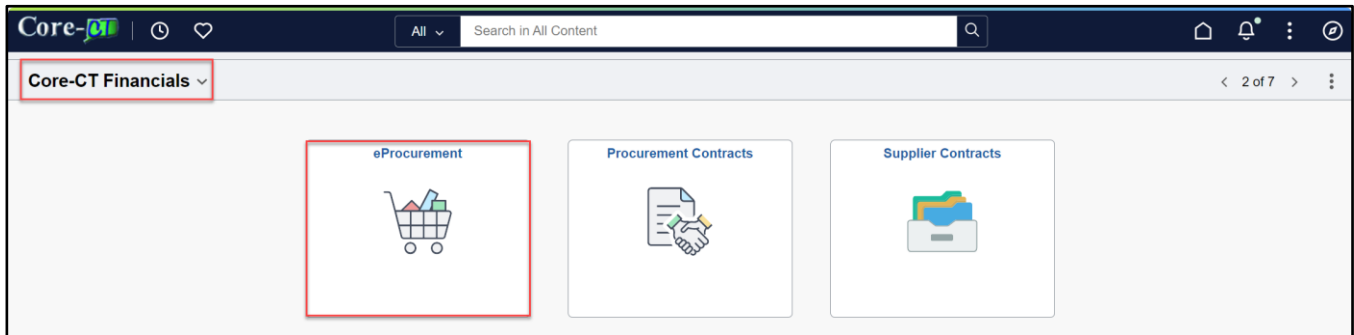
Navigation:



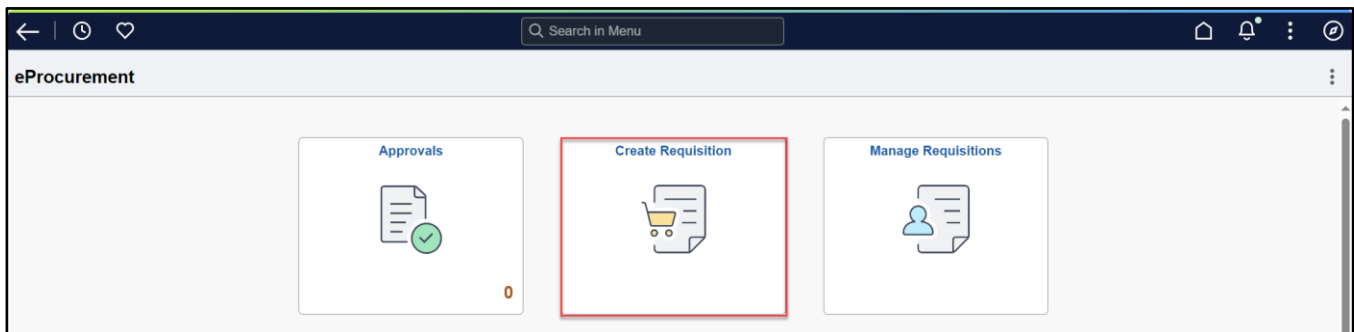
Nav Bar > Menu > Core-CT Financials > eProcurement > Requisition > Create Requisitions

OR

Select **Core-CT Financials**
Click the **eProcurement Tile**



Select the **Create Requisitions Tile**





Creating a Special Request Requisition

Procedure:

The navigation lands user on the *Requisition Defaults* page

1. Enter the Requisition Name

Note: *If there are items in the cart from a previous session, the previous requisition name will display*

The screenshot shows the 'Requisition Defaults' form. The 'Requisition Name' field is highlighted with a red box. The form is divided into several sections: Header Defaults, Line Defaults, Shipping Defaults, and Distribution Defaults. The 'Requisition Name' field is located in the Header Defaults section. Below the form, there is a table with columns: Distribution Line %, Percent %, Location %, GL Unit %, and Account %.

Distribution Line %	Percent %	Location %	GL Unit %	Account %
1	100	ACORE	STATE	

2. Click **Requisition Type** drop-down menu

3. Select **Requisition**

The screenshot shows the 'Requisition Defaults' form with the 'Requisition Type' dropdown menu open. The 'Requisition' option is selected and highlighted with a red box. The dropdown menu lists the following options: DAS-BID, ITD-10, POS - Purchase of Service, PSA - Personal Service, Requisition, TSR-Equipment, and TSR-MACR.



4. Add **Supplier ID*** (verify the Supplier Location that populates underneath is the correct one for the req you are creating), **Buyer**, **Category***, and **UOM*** to the **Line Defaults** section

The screenshot shows the 'Line Defaults' section with a red box highlighting the following fields: Supplier ID, Supplier Location, Buyer, Category, and Unit of Measure. Each field has a search icon to its right.

5. Verify the Shipping Location code or add a one-time address/Attention as needed

The screenshot shows the 'Shipping Defaults' section with a red box highlighting the 'Ship To' field (containing '1290000008') and the 'Add One Time Address' button. Another red box highlights the 'Attention' field.

6. Add Chartfield information into the **Distribution Defaults***

The screenshot shows the 'Distribution Defaults' section. It includes a 'SpeedChart' field, a tabbed interface with 'Chartfields1' selected, and a table with the following columns: Distribution Line, Percent, Location, GL Unit, and Account. The table contains one row with values: 1, 100, ACORE, STATE, and an empty field.

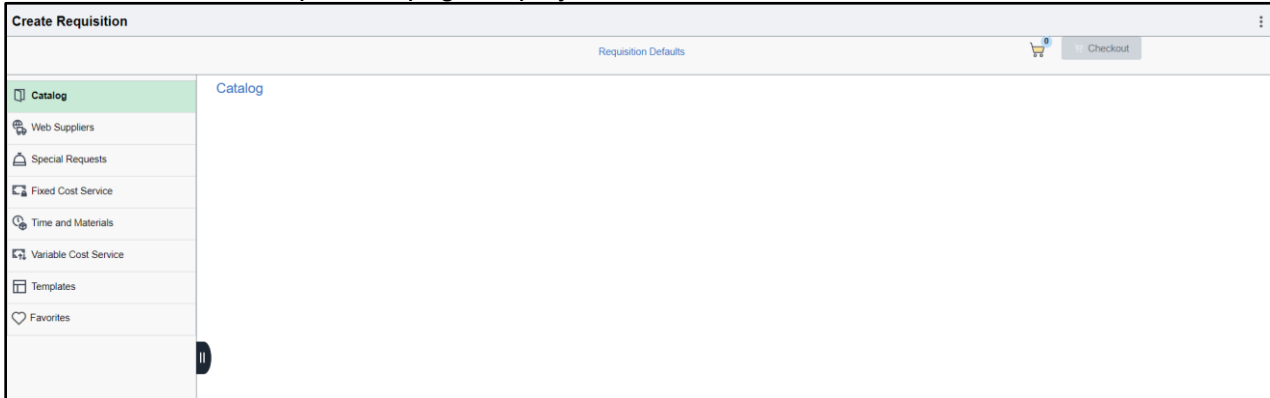
Note: Some Chartfield values may pre-populate depending on the user's settings


7. Click **Done**

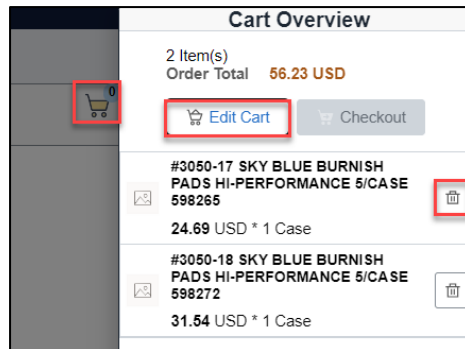
The screenshot shows the 'Requisition Defaults' section with a 'Cancel' button on the left and a 'Done' button on the right, both highlighted with red boxes.



8. The Create Requisition page displays



Note: The **Persistent Cart** feature stores items in the cart until a req is saved or submitted. Click the cart icon to display any items that may already be in the cart from a previous session and delete or add items as needed. (Click on the cart icon  then select the trash icon next to delete the item, or click Edit Cart, then Continue Shopping to add more items):





9. Click Special Request

The screenshot shows the 'Create Requisition' interface. On the left sidebar, 'Special Requests' is highlighted with a red box. The main content area is titled 'Special Requests' and contains two sections: 'Item Information' and 'Supplier Information'. The 'Item Information' section includes fields for '*Item Description', '*Price', '*Quantity', '*Category', and 'Due Date'. The 'Supplier Information' section includes fields for 'Supplier ID' and 'Supplier Item ID'. There are also dropdown menus for '*Currency Code' (set to USD) and '*Unit of Measure'. A 'Checkout' button is visible in the top right corner.

10. Enter the Item Description

This is a close-up view of the 'Special Requests' form. The '*Item Description' field is highlighted with a red box. Below it are fields for '*Price', '*Quantity', '*Category', and 'Due Date'. The 'Supplier Information' section includes 'Supplier ID' and 'Supplier Location' fields. The 'Manufacturer Information' section includes 'Manufacturer ID' and 'Manufacturer's Item ID' fields. A 'Comment' section at the bottom has a 'Comment Text' field and three checkboxes: 'Send Comment to Supplier', 'Show Comment on Receipt', and 'Show Comment on Voucher'. An 'Add to cart' button is located at the bottom left.

Note: The Category, Unit of Measure, and Supplier ID fields are populated with values entered on the Requisition Defaults page.



11. Enter the **Price** in the price field
12. Enter the **Quantity** in the quantity field
13. Click **Add to Cart**

Note: Repeat steps 10-13 for as many line items as your requisition needs

Special Requests

Item Information

*Item Description

*Price

*Quantity

*Category

Due Date

*Currency Code

*Unit of Measure

Supplier Information

Supplier ID

Supplier Location

Supplier Item ID

Manufacturer Information

Manufacturer ID

Manufacturer's Item ID

Comment

Comment Text

Send Comment to Supplier

Show Comment on Receipt

Show Comment on Voucher

14. Click the **Check-Out** button

Create Requisition

Search in Menu

Requisition Defaults

Special Requests

Item Information

*Item Description

*Price

*Quantity

*Category

Due Date

*Currency Code

*Unit of Measure

Catalog

Special Requests

Fixed Cost Service

Time and Materials

Variable Cost Service

Templates



The **Checkout** page displays

Create Requisition

Requisition Defaults Continue Shopping Save Submit Order Total 4.40 USD

Requisition Summary

Business Unit DASM1 Dept of Administrative Svcs Priority Medium

Requisition Name Requisition Type Requisition

Requester Dispatch Method Print

Currency USD Obligation Amount

Header Comments

Justification Comments

Select All Actions 1 row

Line	Description	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Catalog Item CORRECTION TAPE 2 PER PACK Item ID CM_2157_8133917 Supplier W B MASON COMPANY INC	2	PK	2.20	USD	4.40 USD	<input type="checkbox"/> ScheduleDetails >

Line Comments Delete Order Total 4.40 USD

15. Click the **Line Details** arrow

Requisition Lines Overview

Select All Actions 1 row

Line	Description	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request Software Item ID Supplier	1	1	100.00	USD	100.00 USD	<input type="checkbox"/> ScheduleDetails >

Line Comments Delete Order Total 100.00 USD

- Note: The Purchasing Authority defaults to Contracts (Change as appropriate)



16. Click the **Look-Up Contract ID** button if the Purchasing Authority is Contracts

The screenshot shows the 'Requisition Line Details' form. The 'Contract Information' section contains a 'Contract ID' field with a search icon, which is highlighted with a red box. Other fields include 'Contract Line', 'Category Line', 'Supplier ID', 'Supplier Location', 'Supplier's Catalog Number', and 'Item Supplier Priority'. There are also checkboxes for 'Use Contract if Available', 'Device Tracking', 'Stockless Item', 'RFQ Required', 'Inspection Required', 'Amount Only', and 'Zero Price Indicator'.

17. Click on a **Valid Contract** for this requisition
 - NOTE: The Search Results must only display valid Contract IDs for the Supplier on the req.

The screenshot shows a 'Lookup' search results table. The search criteria is 'Contract ID'. The search results table has the following data:

Contract ID ↑↓	Short Supplier Name ↑↓	Contract Status ↑↓	Description ↑↓	Contract Beginning Date ↑↓	Expire Date ↑↓
24PO.04.22.TEST	SUBURB3422-001	Approved	TESTING	05/28/2024	12/30/2024
18PSX0032AC	SUBURB3422-001	Approved	DASM1 0000005163	01/01/2019	12/31/2024

18. Click **Done** – The Save/Submit options display

The screenshot shows the 'Requisition Line Details' form with the 'Done' button highlighted in red in the top right corner. The 'Order Total' is 100.00 USD.



19. Add justification comments.

The screenshot shows the 'Create Requisition' form. The 'Justification Comments' section is highlighted with a red border. The form includes fields for Business Unit (DOTM1 Dept. of Transportation), Requisition Name (test Catalog), Requester (LichoNan DOT-Licho Nancy), and Currency (USD). There are also dropdown menus for Priority (Medium), Requisition Type (Requisition), and Dispatch Method (Print). A 'Header Comments' checkbox is visible, and a 'Justification Comments' text area is highlighted with a red border.

20. Click the Header Comments button

The screenshot shows the 'Create Requisition' form. The 'Header Comments' button is highlighted with a red box. The form includes fields for Business Unit (DOTM1 Dept. of Transportation), Requisition Name (test Catalog), Requester (LichoNan DOT-Licho Nancy), and Currency (USD). There are also dropdown menus for Priority (Medium), Requisition Type (Requisition), and Dispatch Method (Print). A 'Header Comments' checkbox is visible, and a 'Justification Comments' text area is highlighted with a red border.

21. The Requisition Header Comments and Attachments page displays. Enter comments and make visible on the purchase order (Send to Supplier), Receipt, or Voucher by toggling those flags as needed.

The screenshot shows the 'Requisition Header Comments and Attachments' page. The 'Header Comments' button is highlighted with a red box. The page includes a 'Comments' section with a 'Use Standard Comments' button, a 'Comment Text' field, and three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher', all set to 'No'. There is also an 'Add Attachment' button.



22. Click the Add Attachment button on the Header Comments and Attachments page

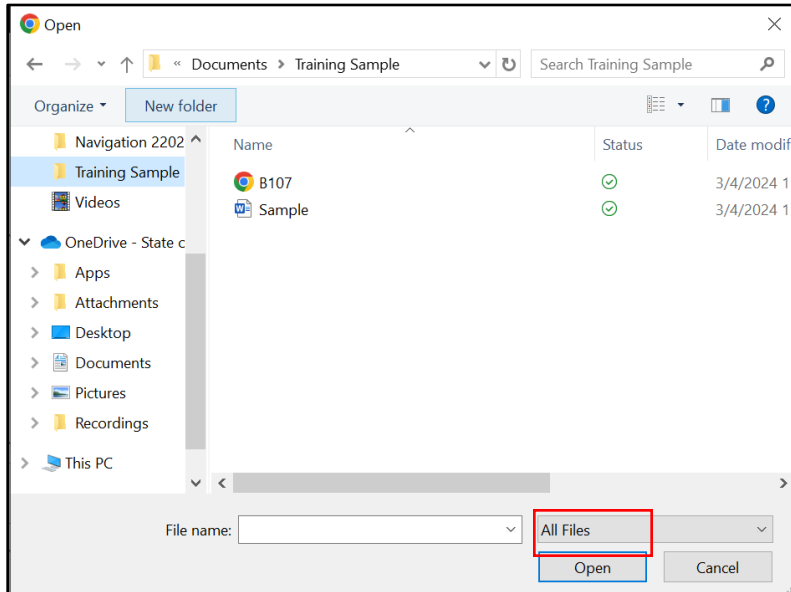
The screenshot shows a web interface for adding attachments. At the top, there are "Cancel" and "Done" buttons. The main title is "Requisition Header Comments and Attachments". Below this, there is a "Comments" section with a "+" and "-" button. A "Use Standard Comments" button is present. A "Comment Text" input field is provided. Below the input field are three checkboxes: "Send to Supplier" (No), "Show at Receipt" (No), and "Show at Voucher" (No). At the bottom left, the "Add Attachment" button is highlighted with a red box.

23. The File Attachment screen displays. Select *My Device*

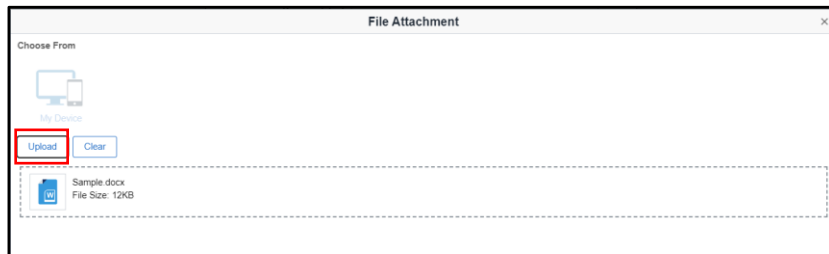
The screenshot shows a "File Attachment" dialog box. It has a title bar with "File Attachment" and a close button. Below the title bar, it says "Choose From". There is a single option, "My Device", represented by an icon of a computer monitor and a smartphone. This option is highlighted with a red box. Below the options, there is a large dashed rectangular area.



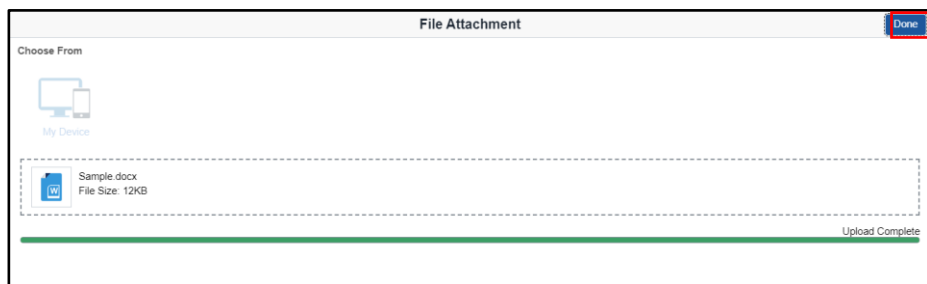
24. Select the document you wish to attach and click the **Open** button



25. Click **Upload**



26. Click **Done**





27. Toggle the *Send to Supplier* flag to send attachment(s) (for purchase orders dispatched via email only) and Click **Done** once more – *For additional attachments, repeat steps 21-27*

The screenshot shows a dialog box titled "Requisition Line Comments and Attachments". It has "Cancel" and "Done" buttons. Under "Comments", there is a "Use Standard Comments" button, a "Comment Text" input field, and three checkboxes: "Send to Supplier" (No), "Show at Receipt" (No), and "Show at Voucher" (No). Below is an "Add Attachment" button. The "Attachments" section shows a table with one row: "Sample.docx". The "Send to Supplier" checkbox for this attachment is highlighted with a red box.

28. Click the Line Comments icon

The screenshot shows a table titled "Requisition Lines Overview". The first row is highlighted. The "Line Comments" icon (a speech bubble) is highlighted with a red box. The table columns include: Item ID, Supplier (SUBURBAN STATIONERS INC), Quantity (1), Unit of Measure (PK), Price (69.33), Currency (USD), Total (69.33 USD), and Order Total (69.33 USD).

29. The Line Comments and Attachments page displays. Add Line Comments on the Comment Text box, and toggle the flags to *Send to Supplier*, *Show at Receipt*, and/or *Show at Voucher* as needed

The screenshot shows the "Requisition Line Comments and Attachments" dialog box. The "Line" label in the title is highlighted in yellow. The "Comment Text" input field is highlighted with a red box. Below it, the "Send to Supplier", "Show at Receipt", and "Show at Voucher" checkboxes are all highlighted with a red box. The "Add Attachment" button is also highlighted with a red box.



30. Click the Add Attachment button on the Line Comments page to attach supporting documents to the requisition Line

31. For additional attachments, follow steps 23-27 starting on page 10

32. Review requisition for accuracy and click **Submit**.

33. Click the **OK** button to acknowledge the message regarding the Requisition Type

34. A Confirmation Page displays and the approval workflow begins.



*Note: The following applies to **all** requisitions with **req type Requisition***

- The **Requisition Type** cannot be changed once saved and/or submitted
- Clicking **Save** will save the Requisition and assign a Requisition ID, but it will not initiate the Approval Workflow process
- Clicking **Submit** will start the Approval Workflow process and generate a Confirmation page
- If the *Send to Supplier* flag is set to *Yes* for Attachments, the attachment(s) will be sent to the supplier only when the Purchase Order is dispatched via email.



Creating a Catalog Item Requisition Procedure

Follow the Navigation steps on page 1
The Requisition Default Page displays

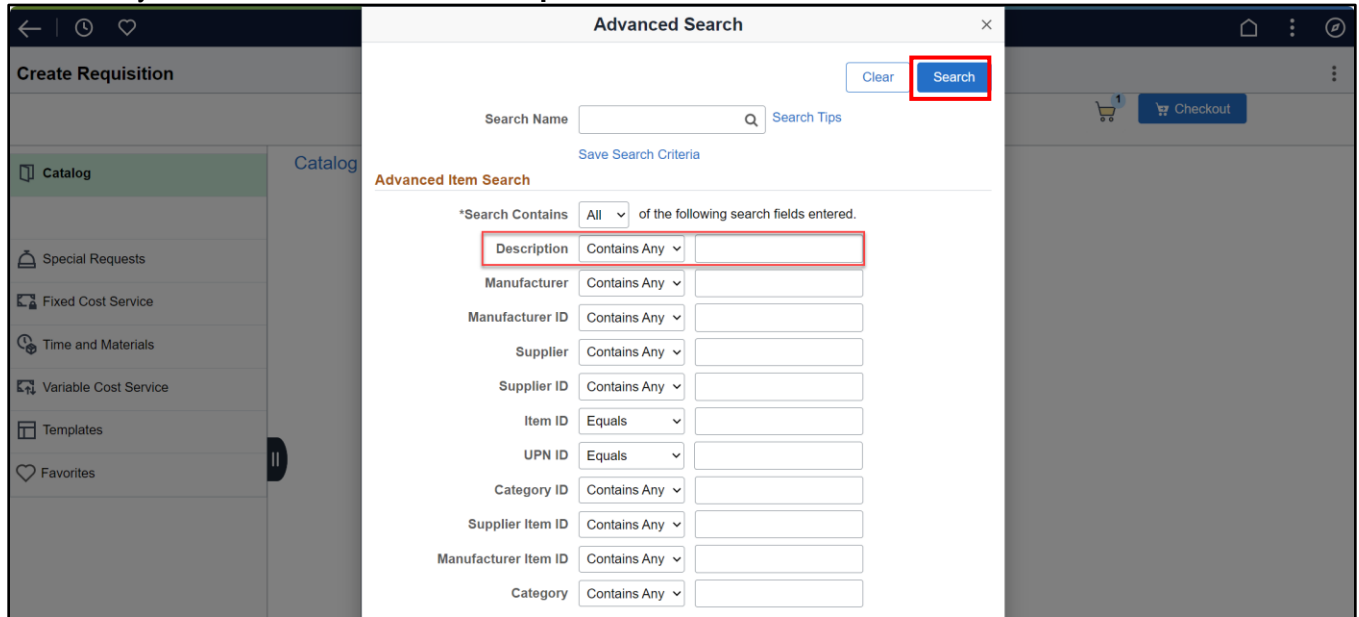
1. Enter the Requisition Name on the Header Defaults section
2. Ensure **Requisition** defaults as the *Requisition Type* selected from the drop down
NOTE: Do **NOT** enter any values on the *Line Defaults*, except for the Buyer; the other values in this section will populate on the lines based on the items you add to the cart – You can add a *One-Time Address* and *Attention* as needed
3. Some of the chartfield values on the *Distribution Defaults* tabs pre-populate based on the user’s setup. Enter the chartfield values as needed. Do **NOT** enter a value for *Account*, that value will populate on the lines based on the items you add to the cart. You may split Distributions as needed by clicking the plus sign (+) at the far right of the chartfields.

4. Click **Done**

5. The Create Requisition page displays - Perform Step 8 from page 4

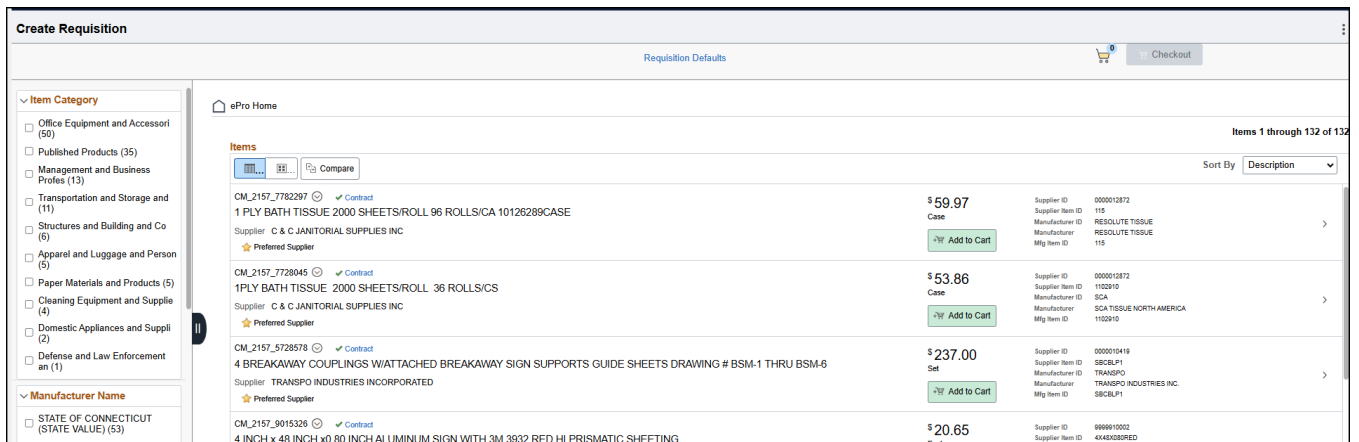


6. Click the **Catalog** Hyperlink. The Catalog Advanced Search page displays. To begin adding items enter a keyword for an item in the **Description** field.



Note: The Search by Contract ID feature is not available in the Fluid User Interface as Oracle retired that option.

7. Click Search – The search results display





NOTE: Use the filters on the left panel. Filtering by **Supplier Name** would prevent you from creating multiple POs for the same Requisition.

8. Select the items to be added to the cart by clicking the arrow on the far right

The screenshot shows the 'Create Requisition' page with a sidebar on the left containing filters for Item Category, Manufacturer Name, Supplier Name, Category Path, and Preferred Supplier. The main area displays a list of items from the supplier 'C & C JANITORIAL SUPPLIES INC'. Each item row includes an item ID, description, price, and an 'Add to Cart' button. A red box highlights the rightmost arrow icon on the 'ADVANCE FACIAL TISSUE' row, indicating where to click to add the item to the cart.

Item ID	Description	Price	Supplier	Action
CM_2157_7728045	1PLY BATH TISSUE 2000 SHEETS/ROLL 36 ROLLS/CS	\$53.86	C & C JANITORIAL SUPPLIES INC	➔
CM_2157_876210	ADVANCE FACIAL TISSUE FLAT BOX 30/100 SHEETS/CASE (ECOLOGO)	\$24.27	C & C JANITORIAL SUPPLIES INC	➔
CM_2157_9914797	FACIAL TISSUE FLAT BOX 8.2x7.88 100 SHEETS 30/CASE TF6710A	\$19.95	C & C JANITORIAL SUPPLIES INC	➔
CM_2157_9014798	FACIAL TISSUE FLAT BOX 8.2x7.88 100 SHEETS 30/CASE TF6810	\$19.60	C & C JANITORIAL SUPPLIES INC	➔

9. Enter a number in the Quantity field
10. Click the Add button
11. Repeat steps 6-9 to add as many line items as needed from the catalog
12. Click the Checkout button

The screenshot shows the 'Item Details' view for 'CORRECTION TAPE 2 PER PACK'. It displays item information such as Item ID (CM_2157_8133917), Supplier (W B MASON COMPANY INC), and Manufacturer (BIC USA INC). At the bottom, there is a quantity input field with the value '2', a search icon, and an 'Add' button.

Item Details

CORRECTION TAPE 2 PER PACK

Item ID: CM_2157_8133917
 Supplier: W B MASON COMPANY INC
 Supplier Item ID: BICWOTAPP21
 Unit of Measure: Pack
 Price: 2.20 USD
 Item Category: Office Equipment and Accessori
 Location: MAIN

Manufacturer: BIC USA INC.
 Manufacturer's Item ID: BICWOTAPP21
 UPN Type
 UPN ID
 Lead Time: 1

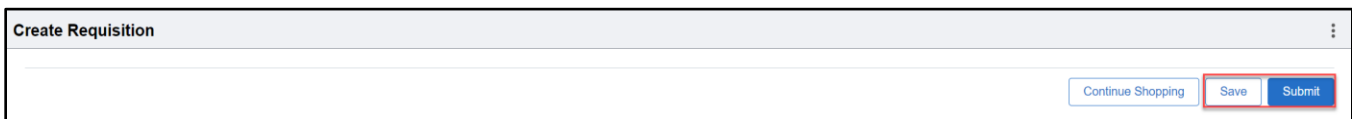
Attributes
 ★ Preferred Supplier

2 PK 🔍 **Add** Add to Favorites Add to Template(s)

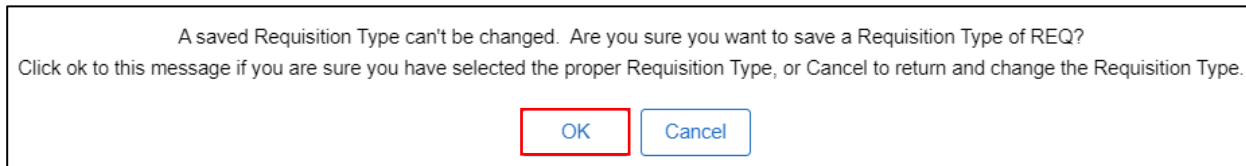


- 13. Follow steps 19-31 starting on page 9 to add the following if needed:
 - a. Justification
 - b. Header and/or Line Comments
 - c. Header and/or Line Attachments

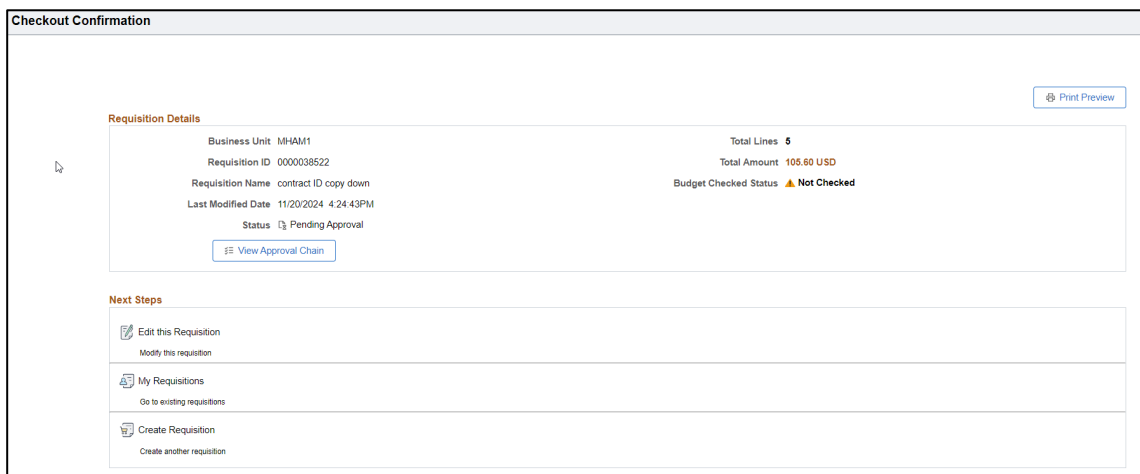
14. Review requisition for accuracy and click Submit.



15. Click the **OK** button to acknowledge the message regarding the Requisition Type



16. A Confirmation Page displays





Creating a WEB (Punch-out) Requisition

Procedure

Follow the Navigation steps on page 1
 The Requisition Default Page displays

1. Enter the Requisition Name on the Header Defaults section
2. Ensure Requisition defaults as the Requisition Type selected from the drop down
 NOTE: Do **NOT** enter any values on the Line Defaults except for the Buyer, the other values in this section will populate on the lines based on the items you add to the cart – You can add a *One-Time Address* and *Attention* as needed
3. Some of the chartfield values on the Distribution Defaults tabs pre-populate based on the user's setup. Enter the chartfield values as needed. Do **NOT** enter a value for *Account*, that value will populate on the lines based on the items you add to the cart. You may split Distributions as needed by clicking the plus sign (+) at the far right of the chartfields.

4. Click the **Web Suppliers** option

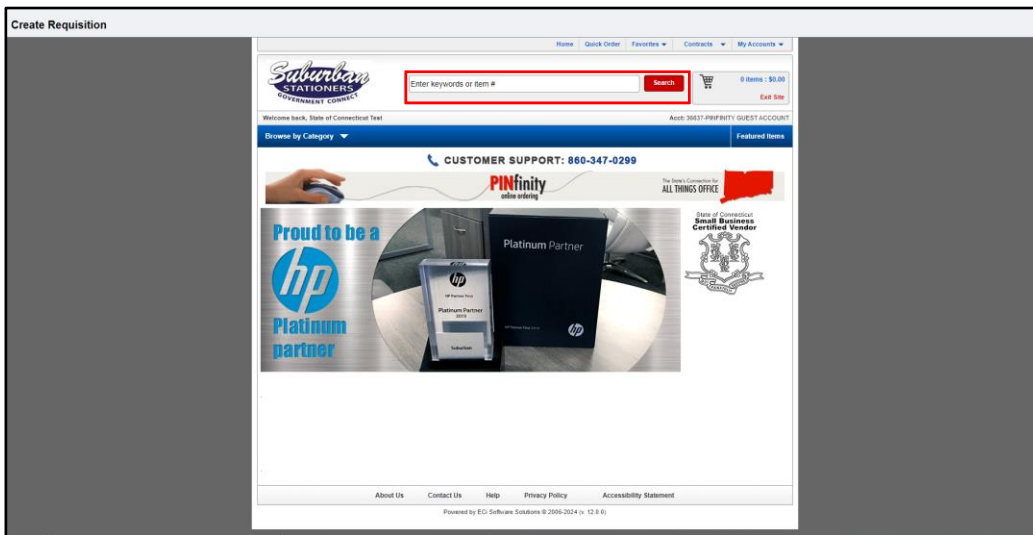


- Note: *If there are items left in the cart from a previous session, Web Suppliers will not display as available for selection. Follow Step 8 on page 4 to delete the items from the cart prior to selecting Web Suppliers.*

5. Click the Suburban or WB Mason option. This will bring you to the supplier's site to add items to the cart



6. Enter an item keyword into the Search field and click **Search**



7. Choose an item from the search results and enter a number in the Quantity field

8. Click the *Add to Cart* button



NOTE: Repeat steps 6-8 to add as many items as needed

9. Click the View Cart button



10. Click the **Submit Cart** button

Suburban STATIONERS GOVERNMENT CONNECT


Enter keywords or item # 1 items : \$69.33

Welcome back, State of Connecticut Test Acct: 36637-PINFINITY GUEST ACCOUNT

Browse by Category

Shopping Cart

Item Total : \$69.33

Item #	Your Price	Quantity	Packaging	Ext Price	Remove
 TOP50126RV TOPS CMS-1500 Laser Printer Forms - 20 lb - 1 Part - 8.50" x 11" Form Size - White - Red Print Color - Paper - 500 / Pack Comments: <input type="text"/>	\$69.33 / Pack	1	500/Pack	\$69.33	<input type="button" value="X"/>

Item Total: \$69.33



11. The Requisition Lines display.

12. Follow steps 19-31 starting on page 9 to add the following if needed:
- a Justification
 - b Header and/or Line Comments
 - c Header and/or Line Attachments

13. Review requisition for accuracy, and click Submit



14. Click the OK button to acknowledge the message regarding the Requisition Type

A saved Requisition Type can't be changed. Are you sure you want to save a Requisition Type of REQ?
Click ok to this message if you are sure you have selected the proper Requisition Type, or Cancel to return and change the Requisition Type.

15. A Confirmation Page displays

Checkout Confirmation

[Print Preview](#)

Requisition Details

Business Unit	MHAM1	Total Lines	5
Requisition ID	0000038522	Total Amount	105.60 USD
Requisition Name	contract ID copy down	Budget Checked Status	▲ Not Checked
Last Modified Date	11/20/2024 4:24:43PM		
Status	↳ Pending Approval		

[View Approval Chain](#)

Next Steps

- [Edit this Requisition](#)
Modify this requisition
- [My Requisitions](#)
Go to existing requisitions
- [Create Requisition](#)
Create another requisition