Types of Requisitions: Requisition

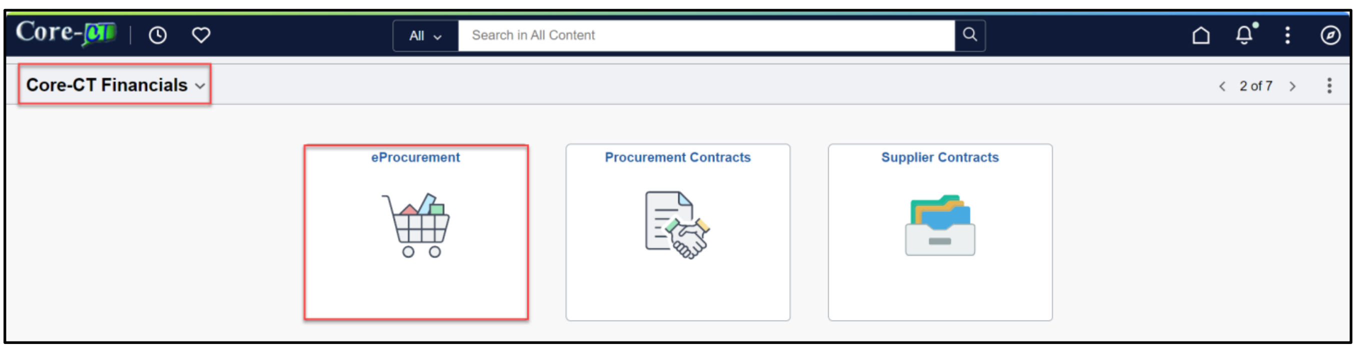
There are several different ways to create requisitions using the **Req Type Requisition** in eProcurement: ***Special request, State Catalog*****, and *WEB Punchout***. This job-aid shows all three; the navigation for all three is the same.

Navigation:

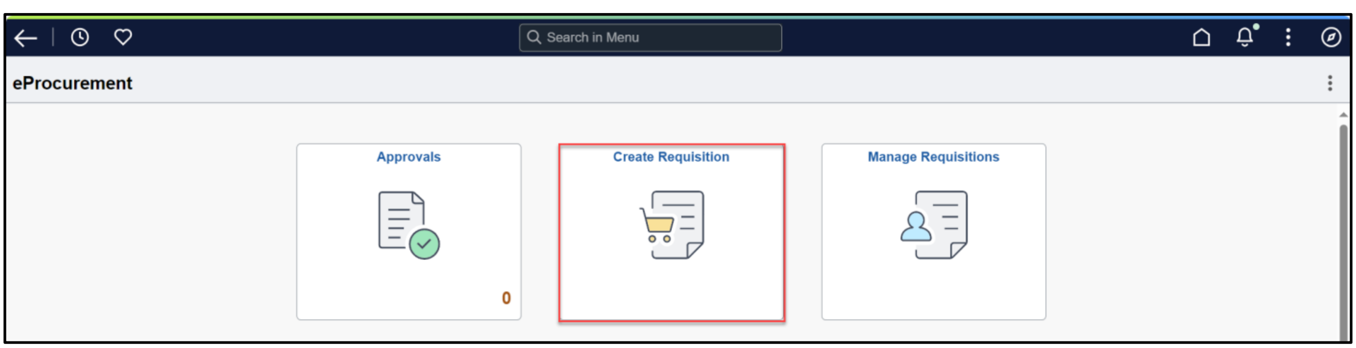
Nav Bar > Menu > Core-CT Financials > eProcurement > Requisition > Create Requisitions

OR

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



Select the ***Create Requisitions Tile***



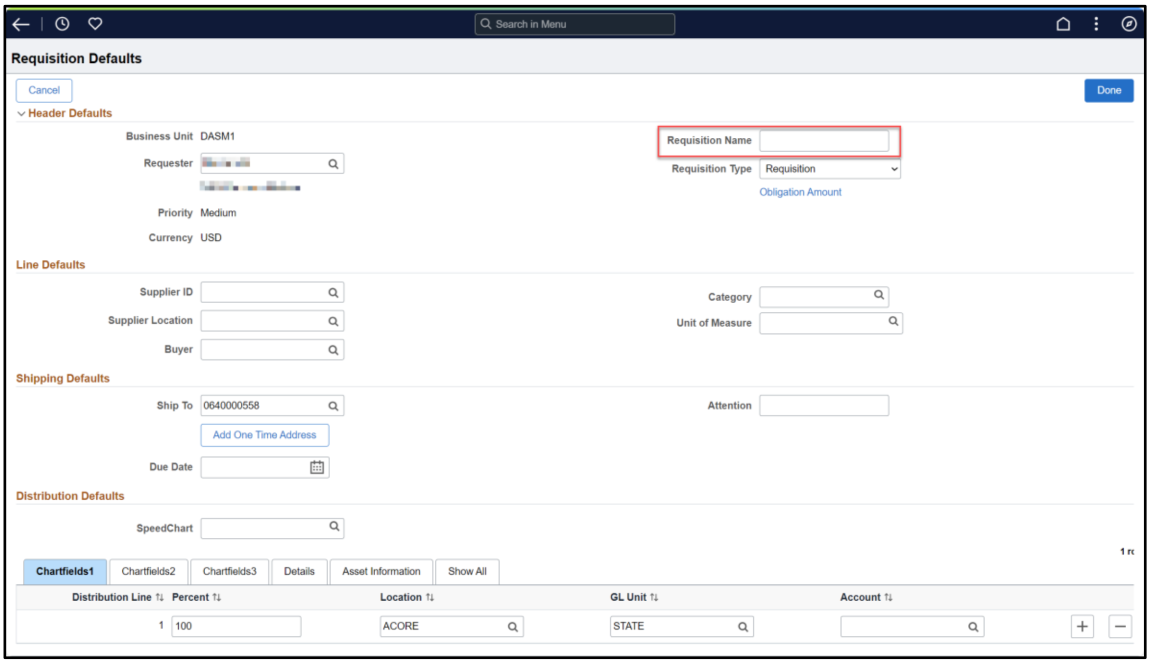
Creating a **Special Request** Requisition

Procedure:

The navigation lands user on the *Requisition Defaults* page

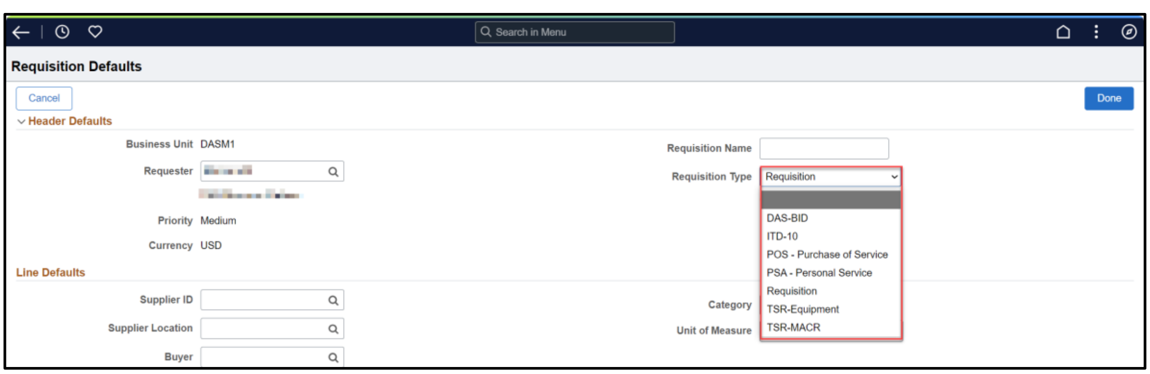
1. Enter the Requisition Name

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

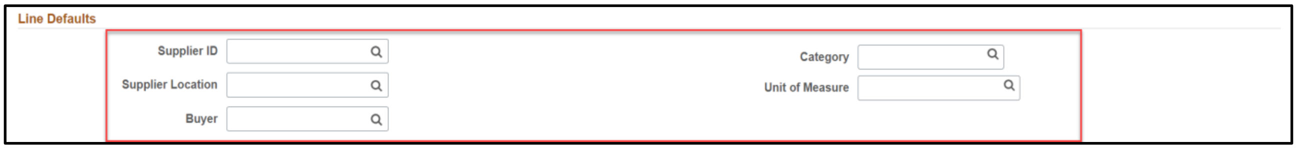


2. Click **Requisition Type** drop-down menu

3. Select **Requisition**



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

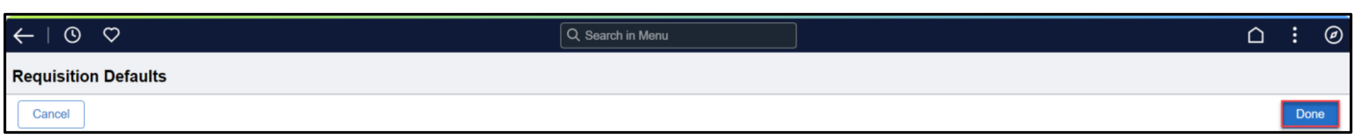


5. Verify the Shipping Location code or add a one-time address/Attention as needed

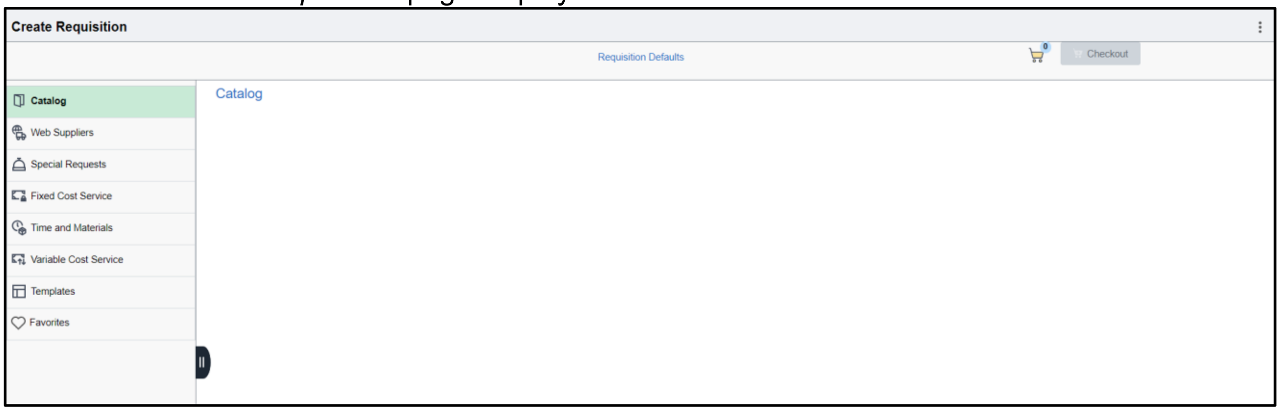
6. Add Chartfield information into the **Distribution Defaults***

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

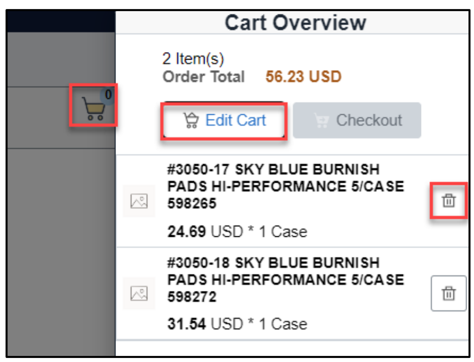
7. Click **Done**

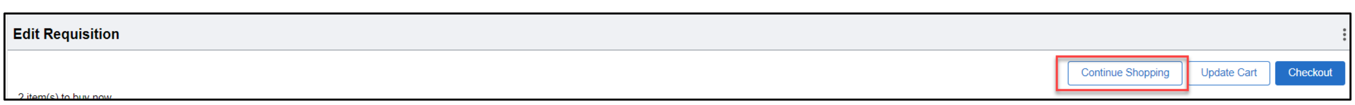


8. The *Create Requisition* page displays

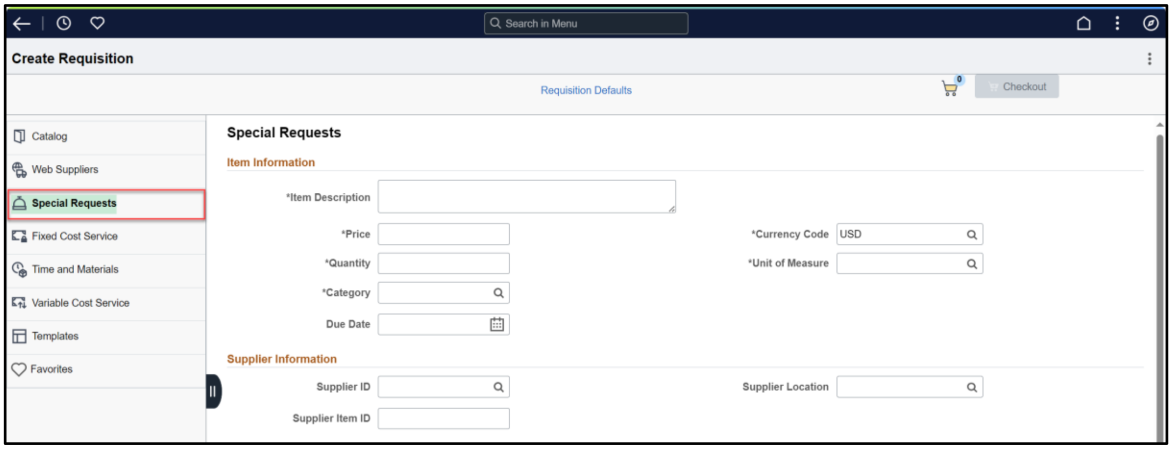


*Note: The **Persistent Cart** feature stores items in the cart until a req is saved or submitted. Click the cart icon to display any items that may already be in the cart from a previous session and delete or add items as needed. (Click on the cart icon*  *then select the trash icon next to delete the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

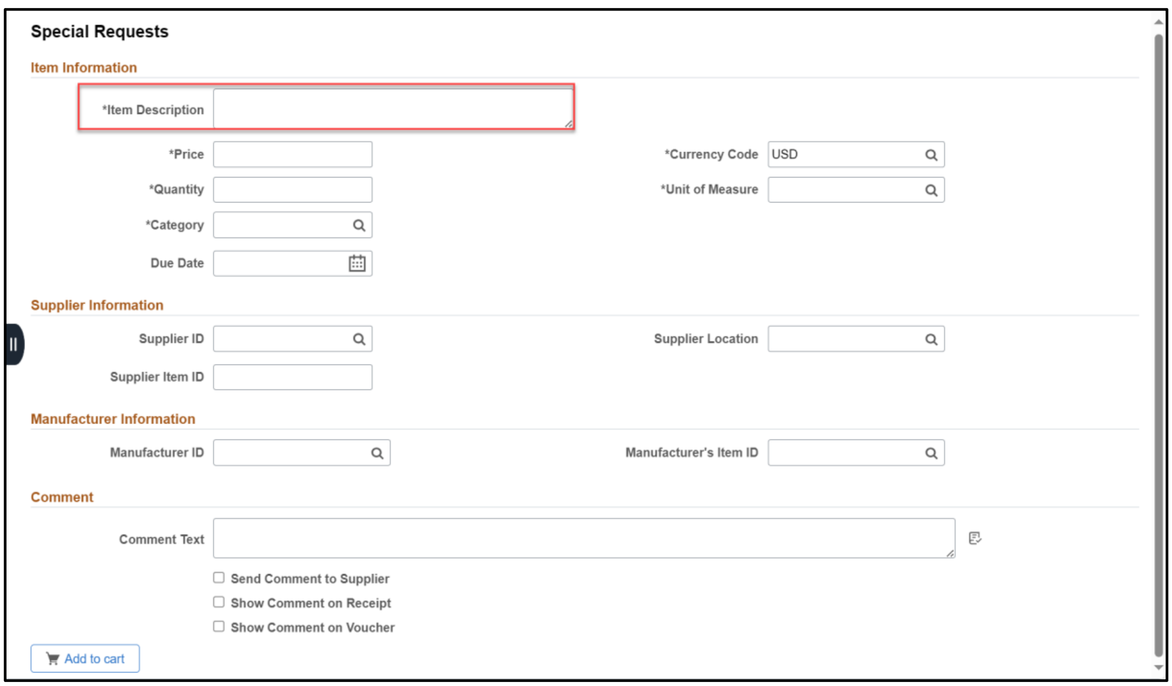




9. Click **Special Request**



10. Enter the Item Description

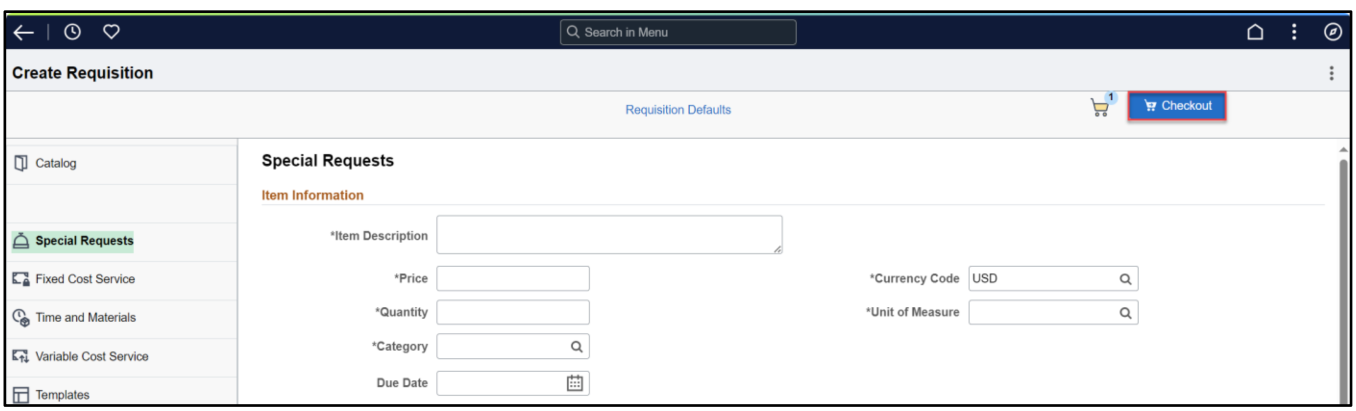


Note: *The Category, Unit of Measure, and Supplier ID fields are populated with values entered on the Requisition Defaults page.*

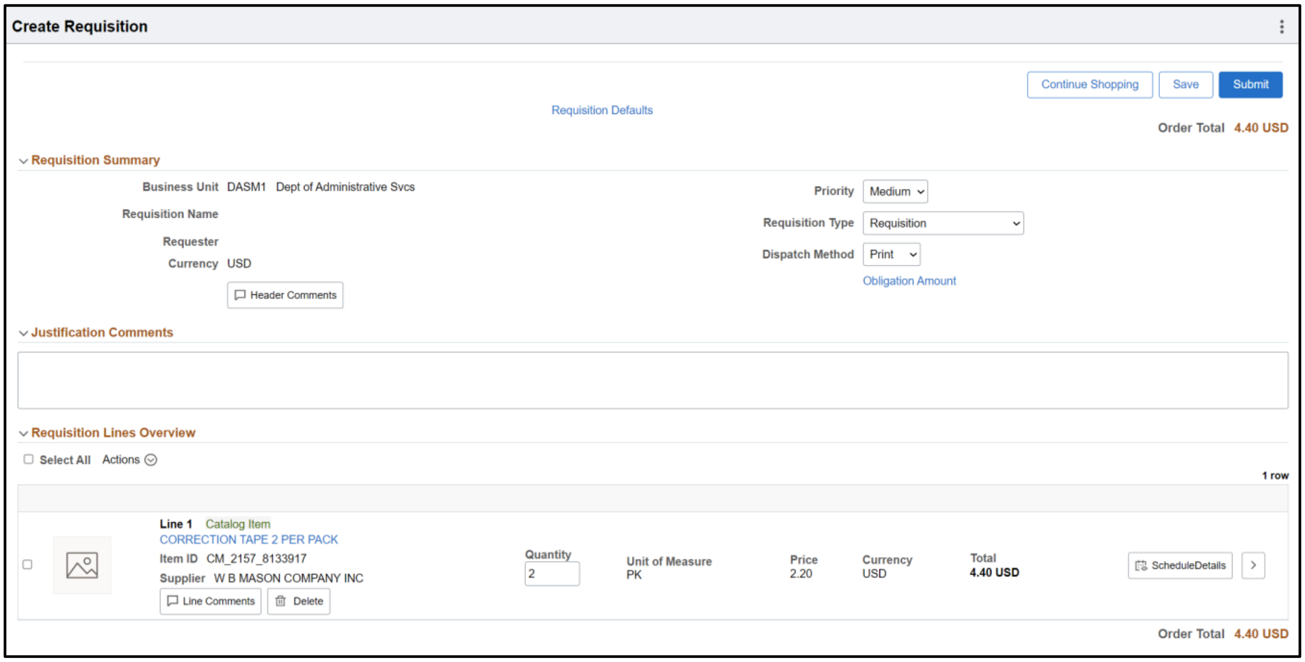
11. Enter the **Price** in the price field
12. Enter the **Quantity** in the quantity field
13. Click **Add to Cart**

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

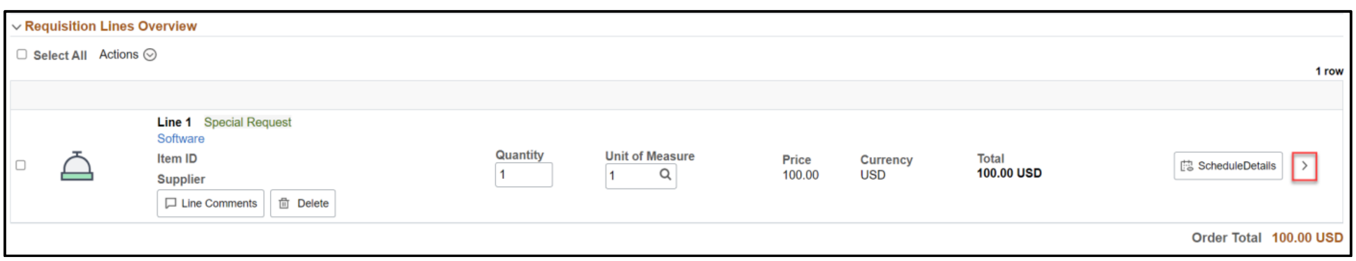
14. Click the **Check-Out** button



*The **Checkout** page displays*

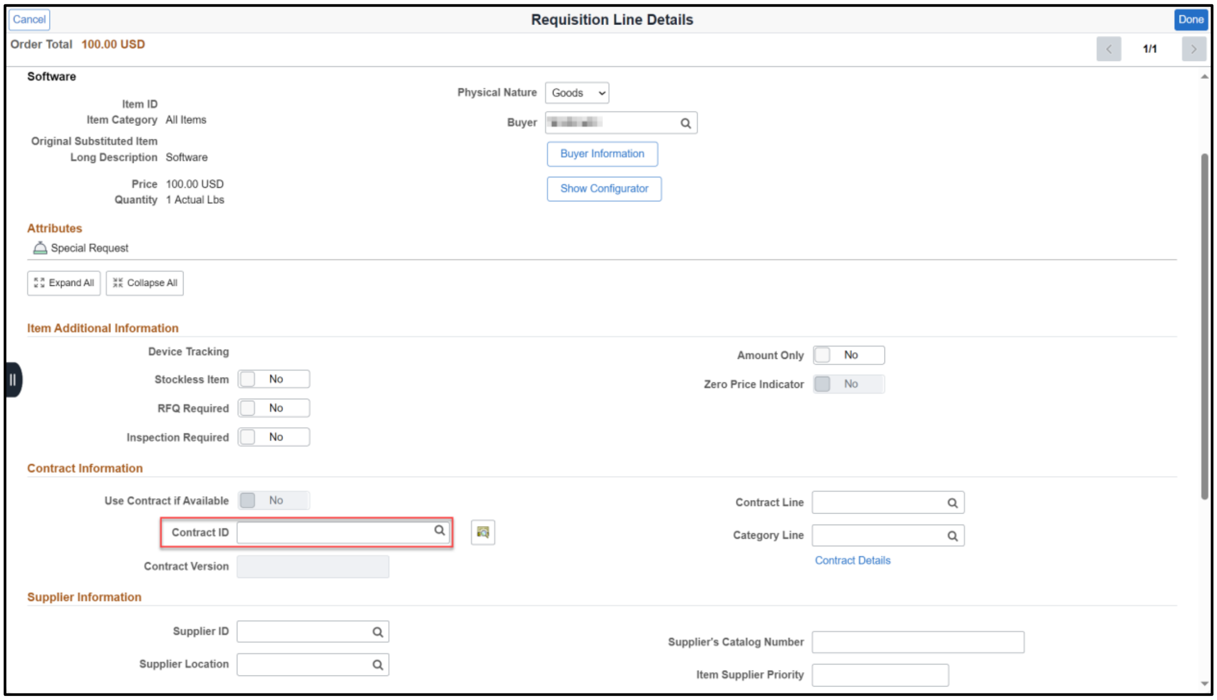


15. Click the **Line Details** arrow

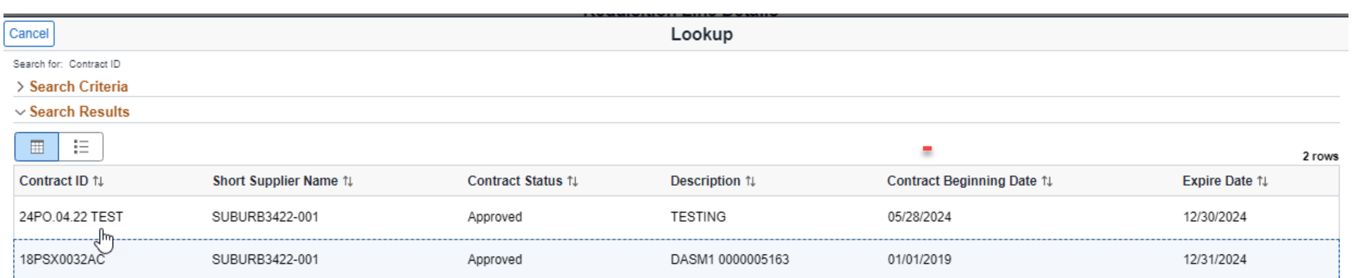


- Note: *The Purchasing Authority defaults to Contracts (Change as appropriate)*

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

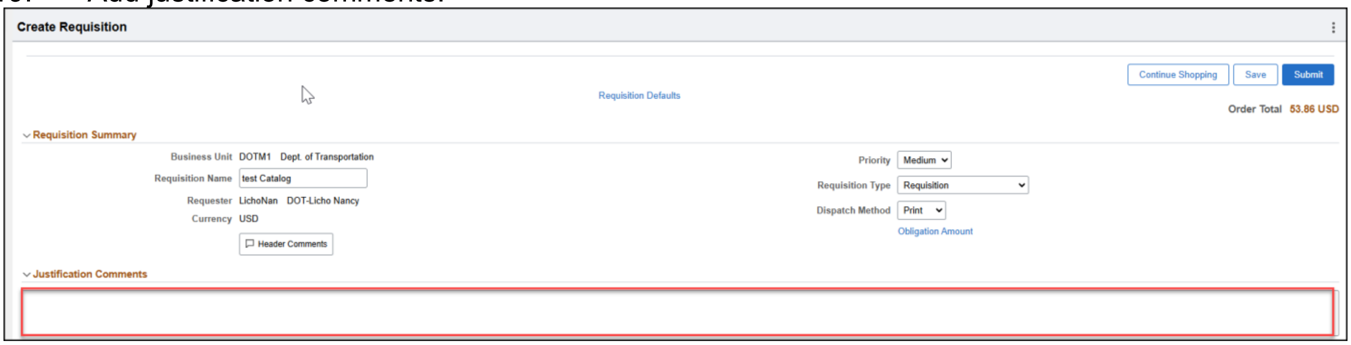


17. Click on a **Valid Contract** for this requisition
- *NOTE: The Search Results must only display valid Contract IDs for the Supplier on the req.*

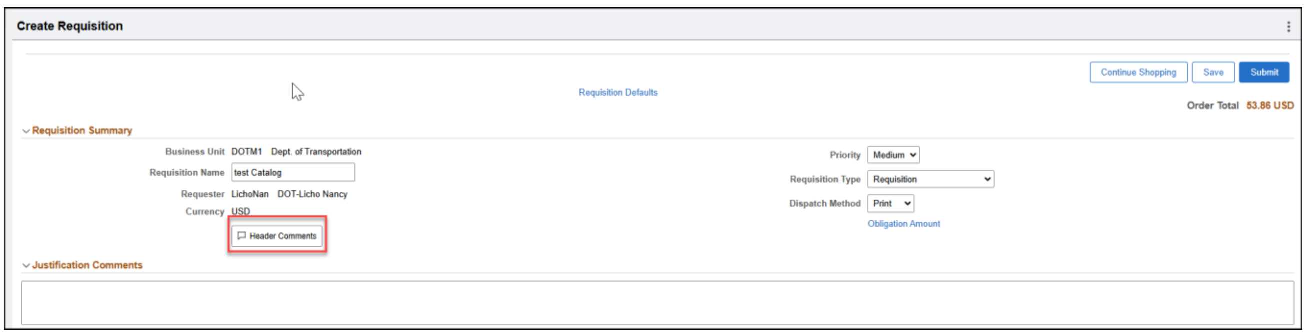


18. Click **Done** – The Save/Submit options display

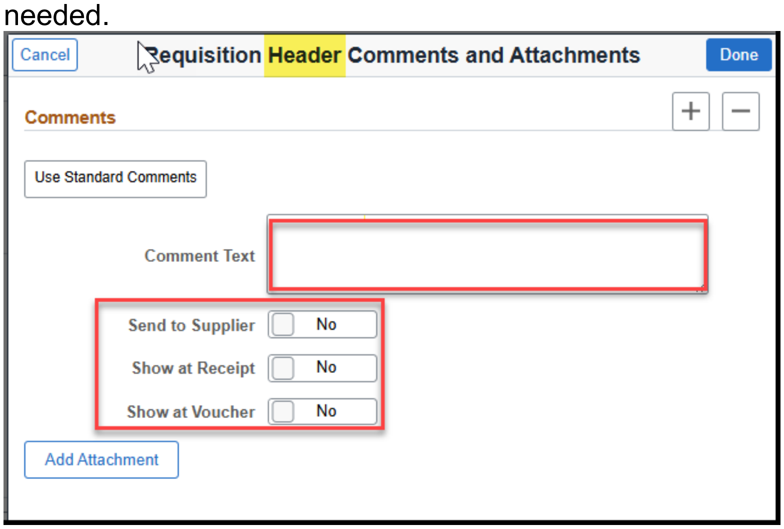
19. Add justification comments.



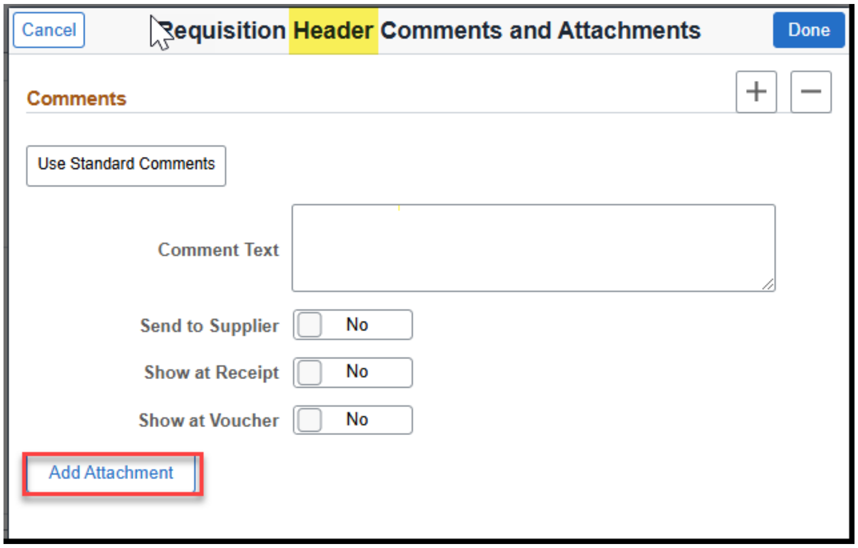
20. Click the Header Comments button



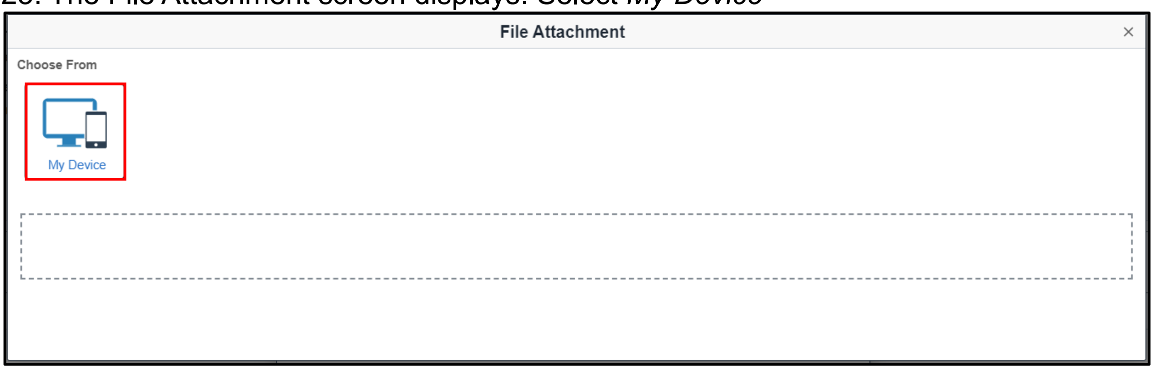
21. The Requisition Header Comments and Attachments page displays. Enter comments and make visible on the purchase order (Send to Supplier), Receipt, or Voucher by toggling those flags as needed.



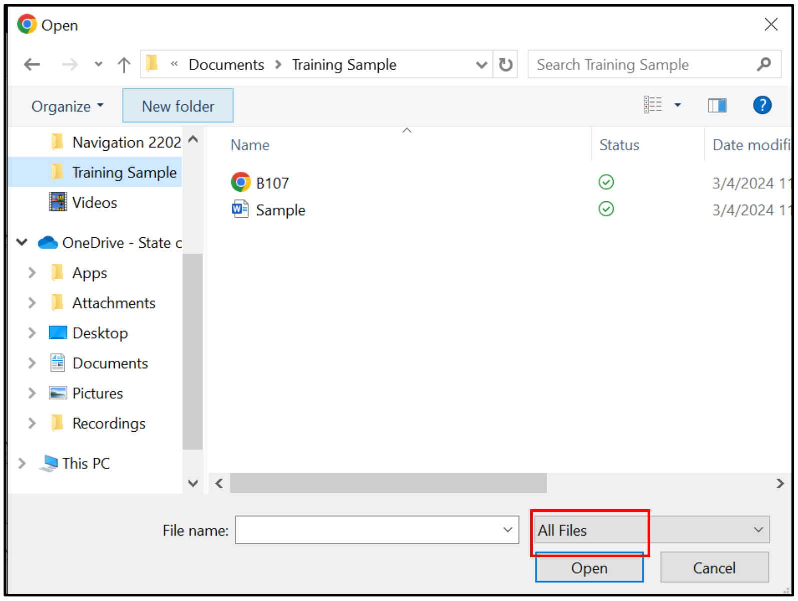
22. Click the Add Attachment button on the Header Comments and Attachments page



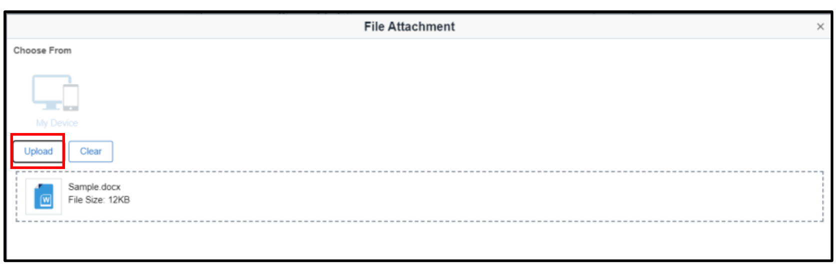
23. The File Attachment screen displays. Select *My Device*



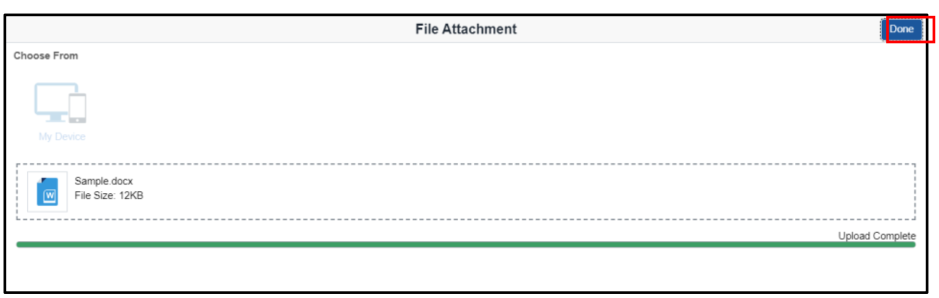
24. Select the document you wish to attach and click the **Open** button



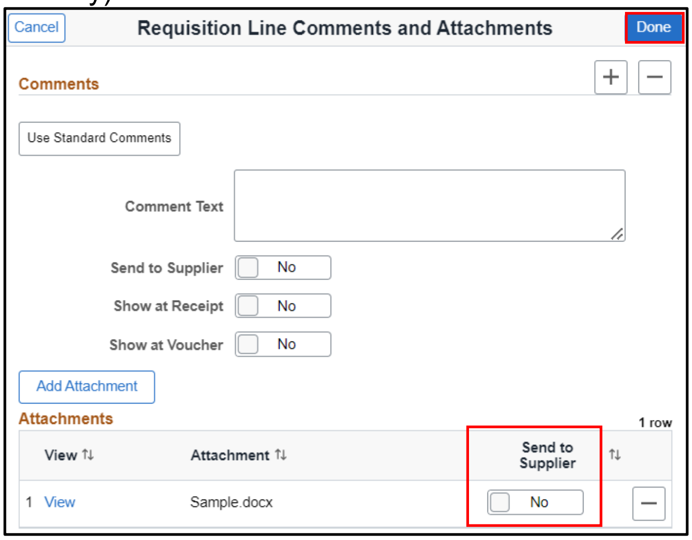
25. Click **Upload**



26. Click **Done**

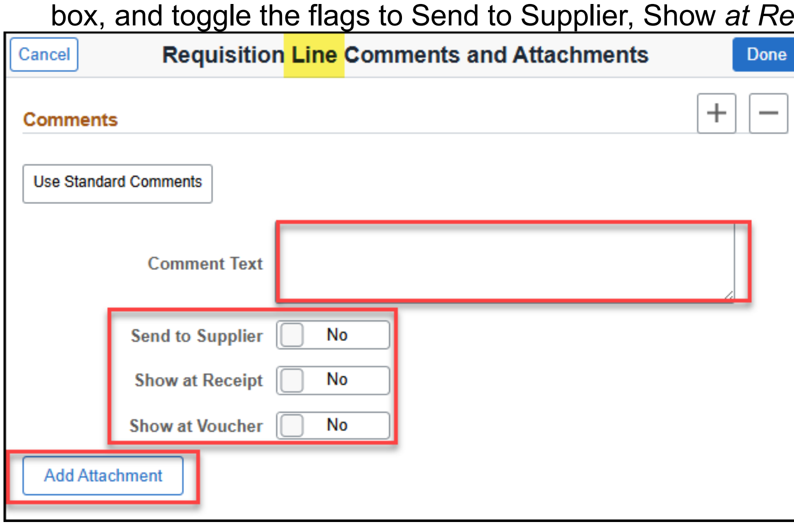


27. Toggle the *Send to Supplier* flag to send attachment(s) (for purchase orders dispatched via email only) and Click **Done** once more – *For additional attachments, repeat steps **21-27***

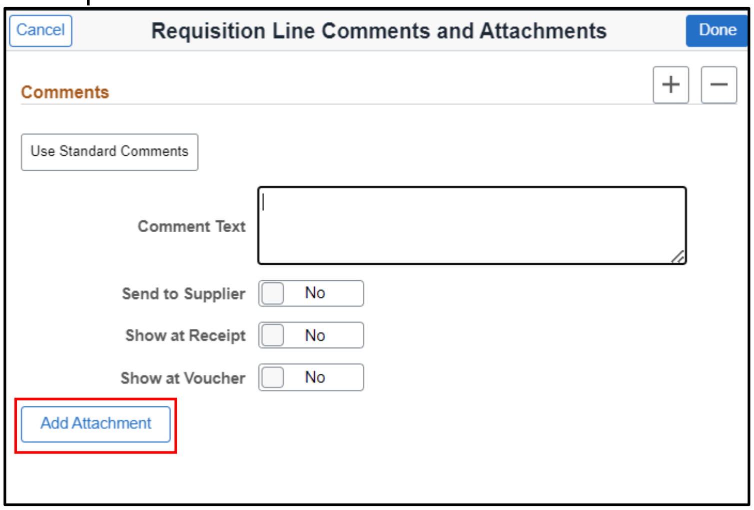


28. Click the Line Comments icon

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

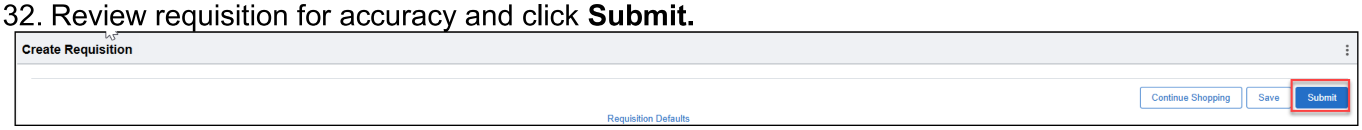


30. Click the Add Attachment button on the Line Comments page to attach supporting documents to the requisition Line



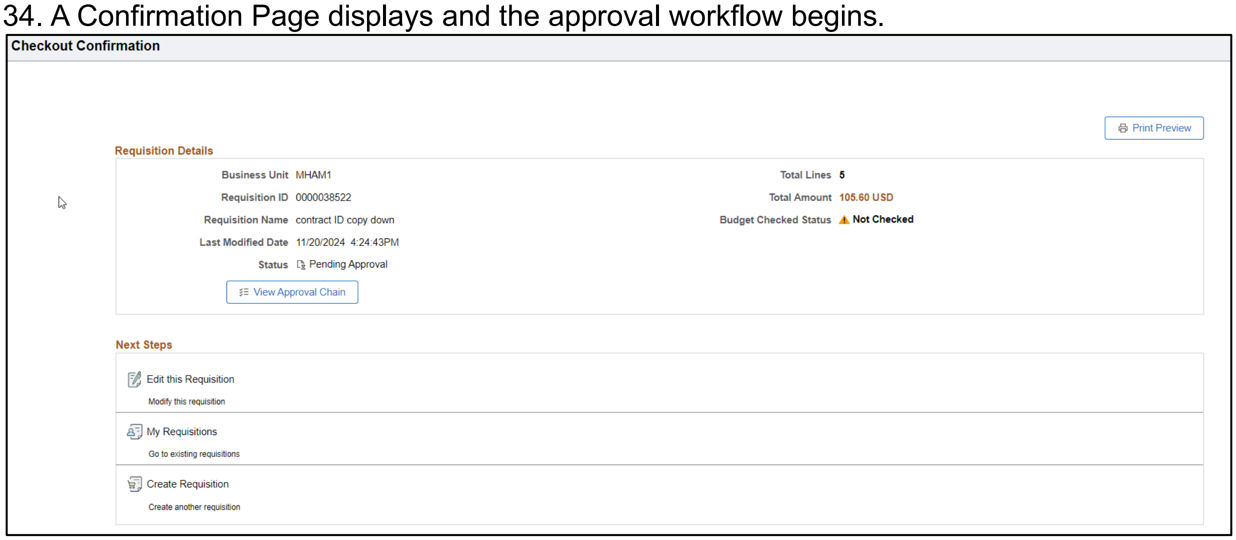
31. For additional attachments, follow steps 23-27 starting on page 10

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***

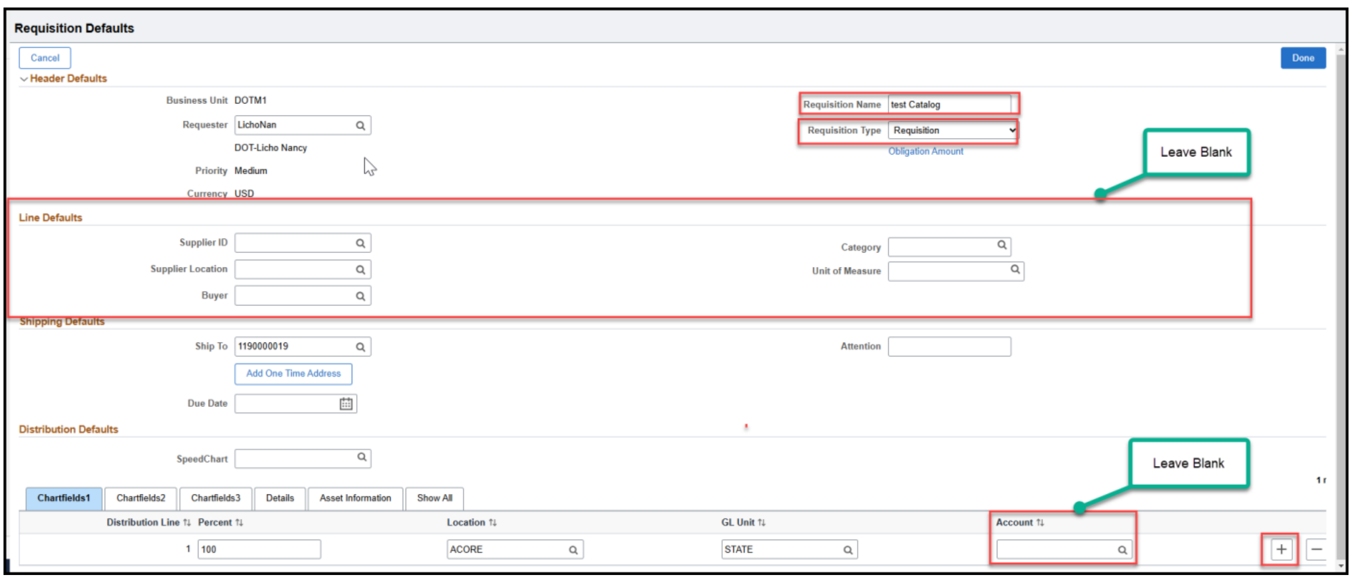
- The **Requisition Type** cannot be changed once saved and/or submitted
- Clicking **Save** will save the Requisition and assign a Requisition ID, but it will not initiate the Approval Workflow process
- Clicking **Submit** will start the Approval Workflow process and generate a Confirmation page
- 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

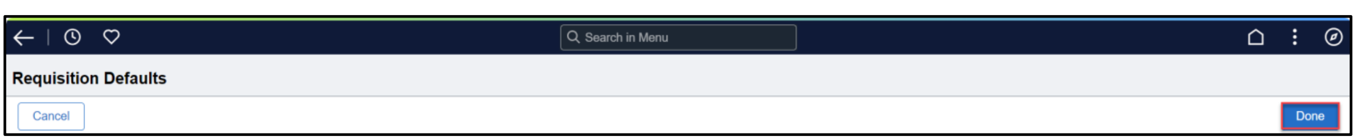
Procedure

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, <u>except for the **Buyer**</u>;* 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.

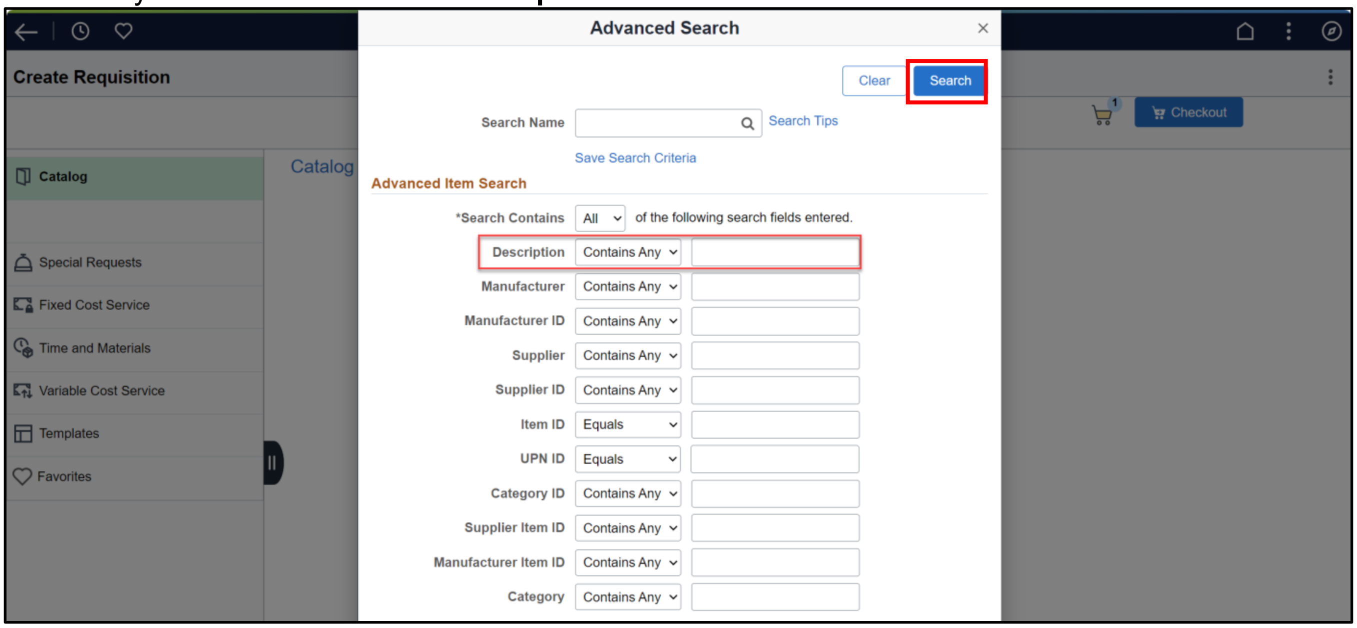


4. Click **Done**



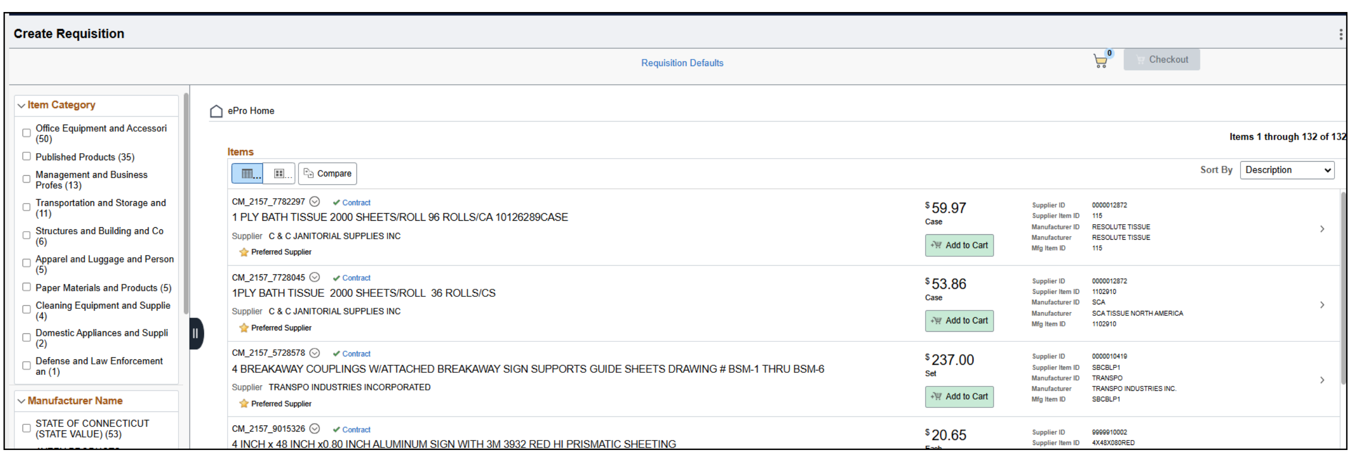
5. The Create Requisition page displays - Perform Step 8 from page 4

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.



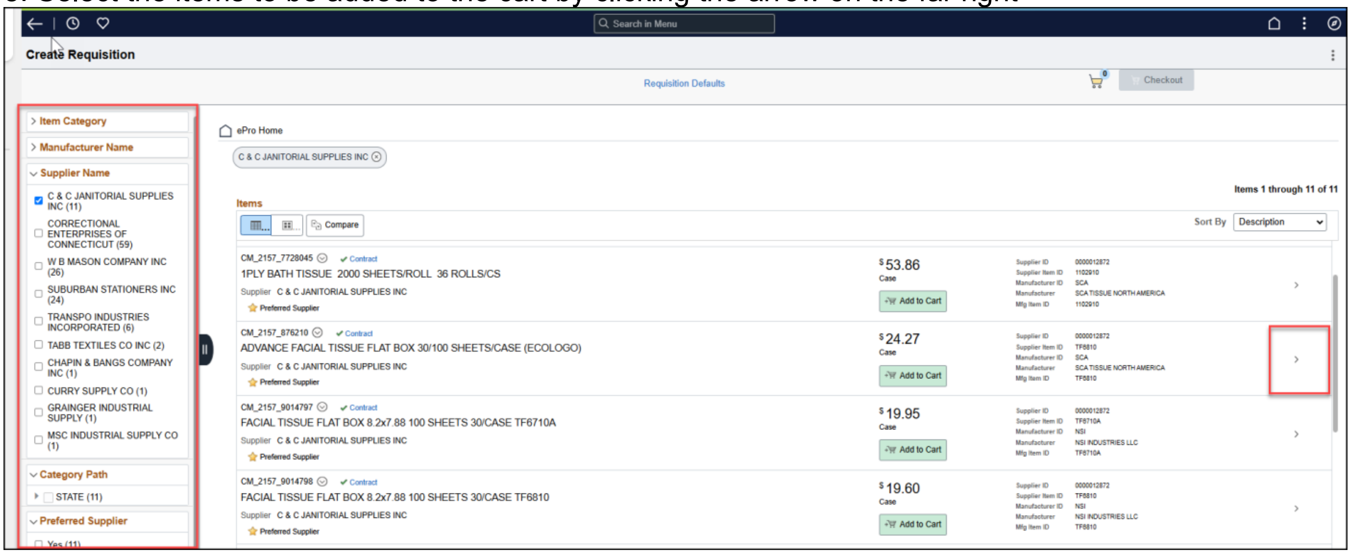
Note: The Search by Contract ID feature is not available in the Fluid User Interface as Oracle retired that option.

7. Click Search – The search results display

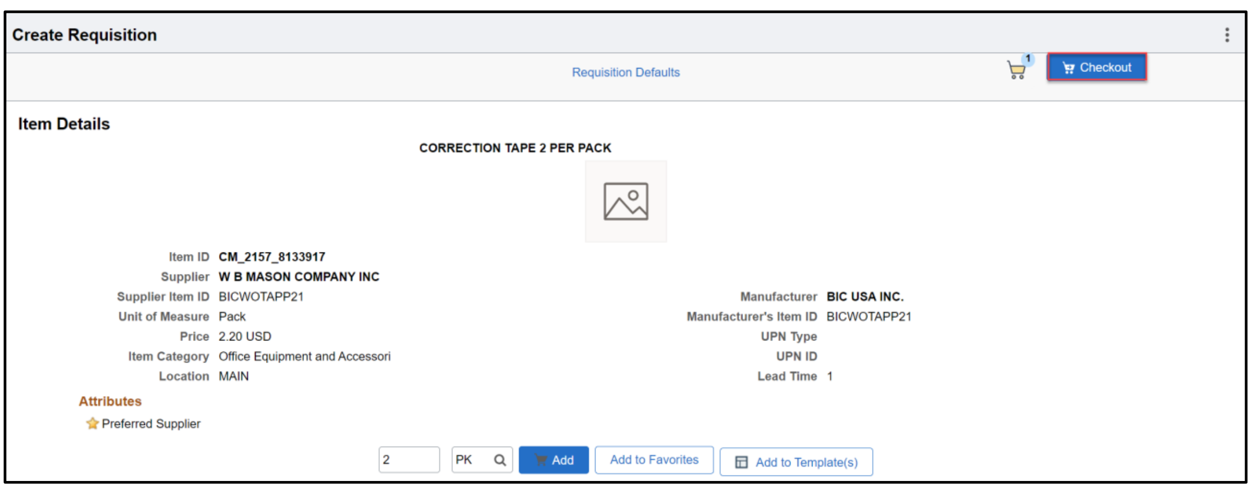


*NOTE: Use the filters on the left panel. Filtering by **Supplier Name** would prevent you from creating multiple POs for the same Requisition.*

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



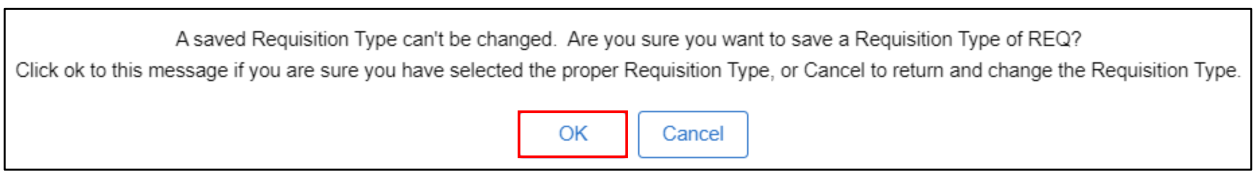
9. Enter a number in the Quantity field
10. Click the Add button
11. Repeat steps 6-9 to add as many line items as needed from the catalog
12. Click the Checkout button



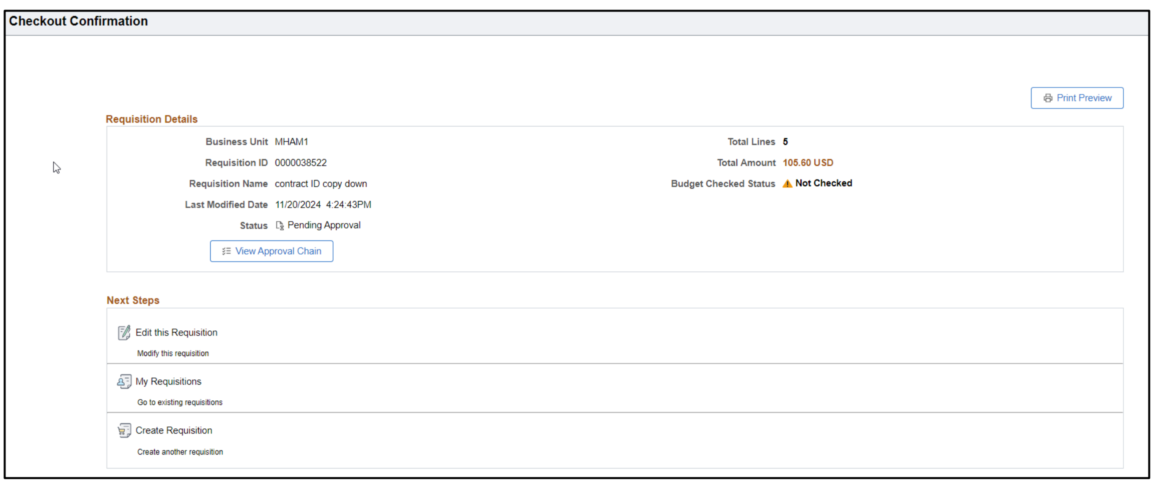
13. Follow steps 19-31 starting on page 9 to add the following if needed:
    a. Justification
    b. Header and/or Line Comments
    c. Header and/or Line Attachments

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

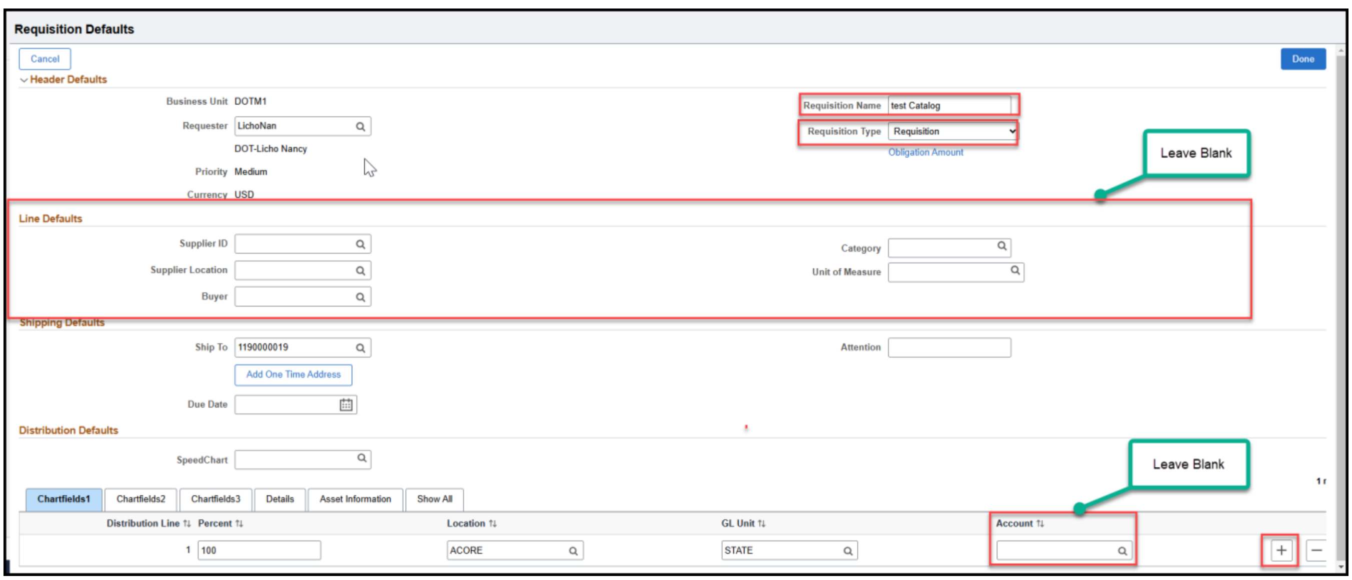


Creating a **WEB (Punch-out)** Requisition

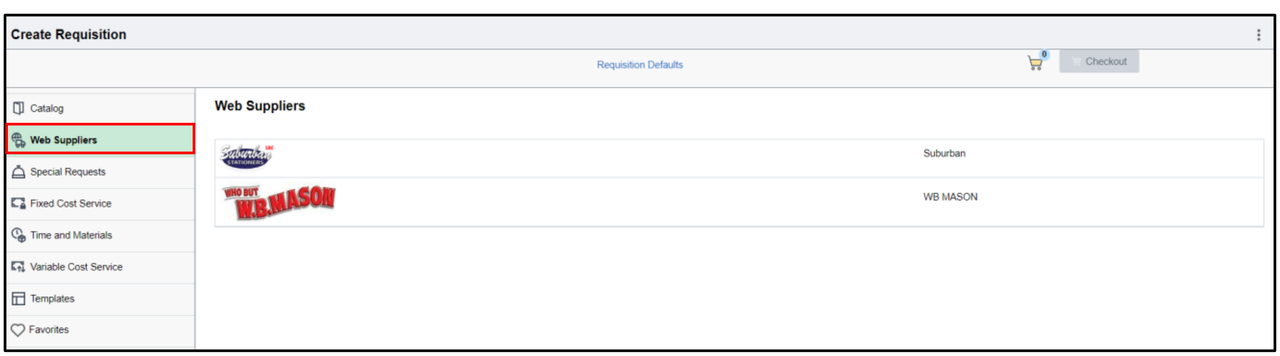
Procedure

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



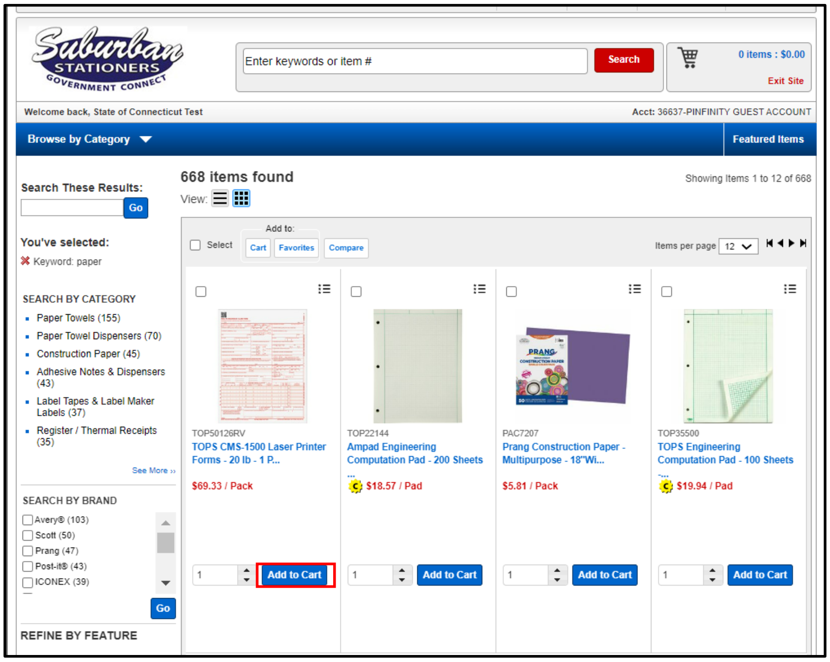
- Note: *If there are items left in the cart from a previous session, Web Suppliers will not display as available for selection. Follow Step 8 on page 4 to delete the items from the cart prior to selecting Web Suppliers.*

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**

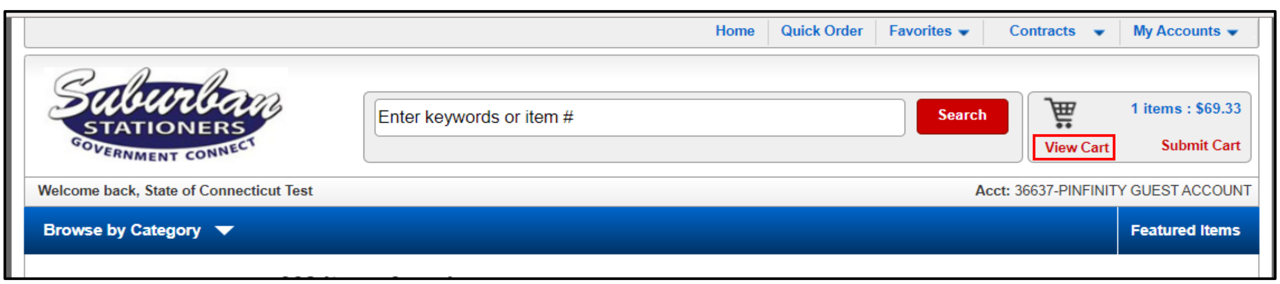
7. Choose an item from the search results and enter a number in the Quantity field

8. Click the *Add to Cart* button

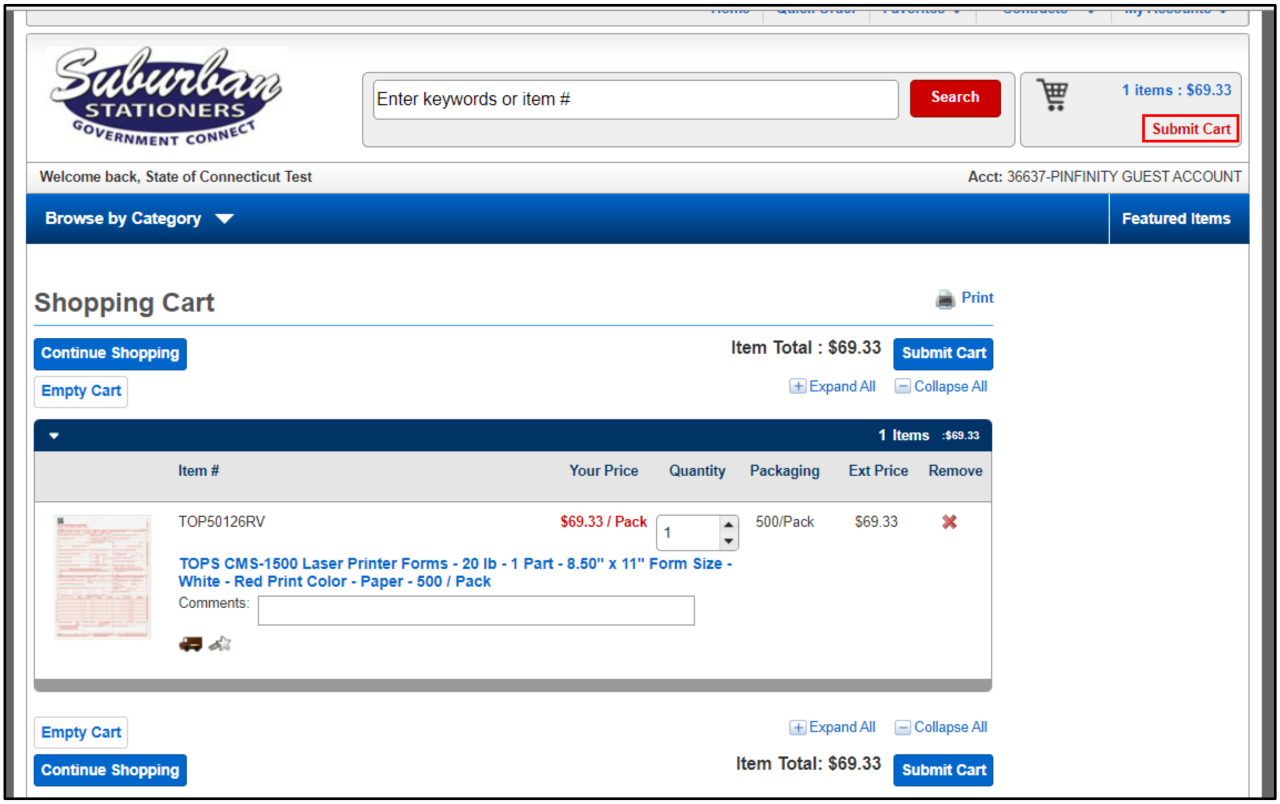


NOTE: Repeat steps 6-8 to add as many items as needed

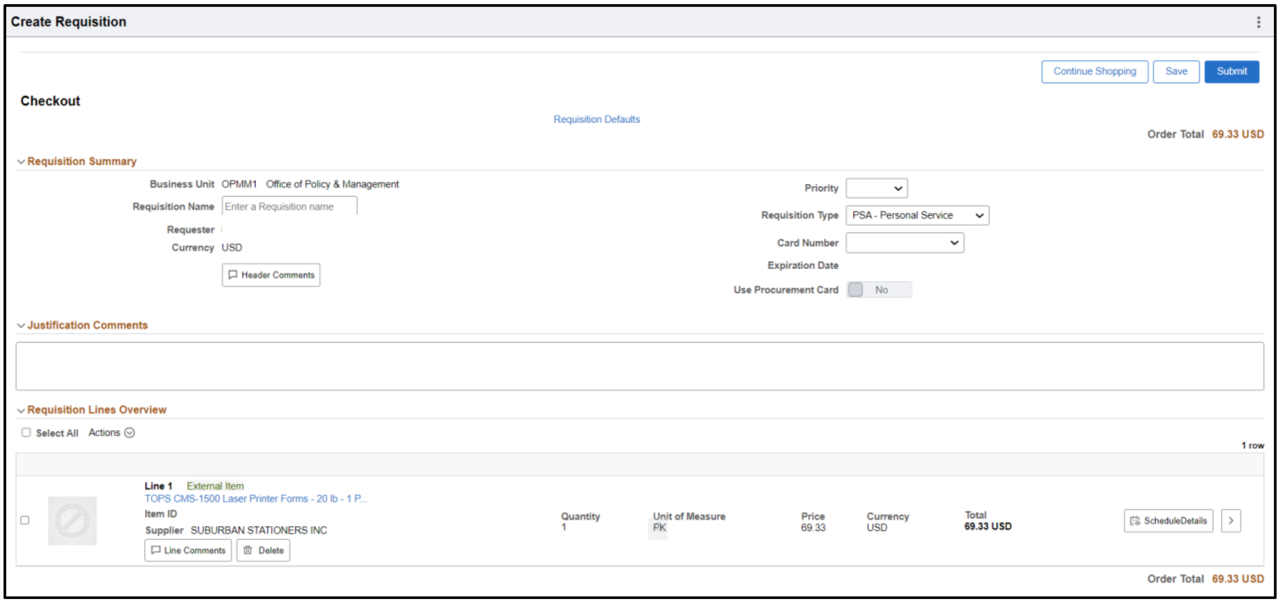
9. Click the View Cart button



10. Click the **Submit Cart** button

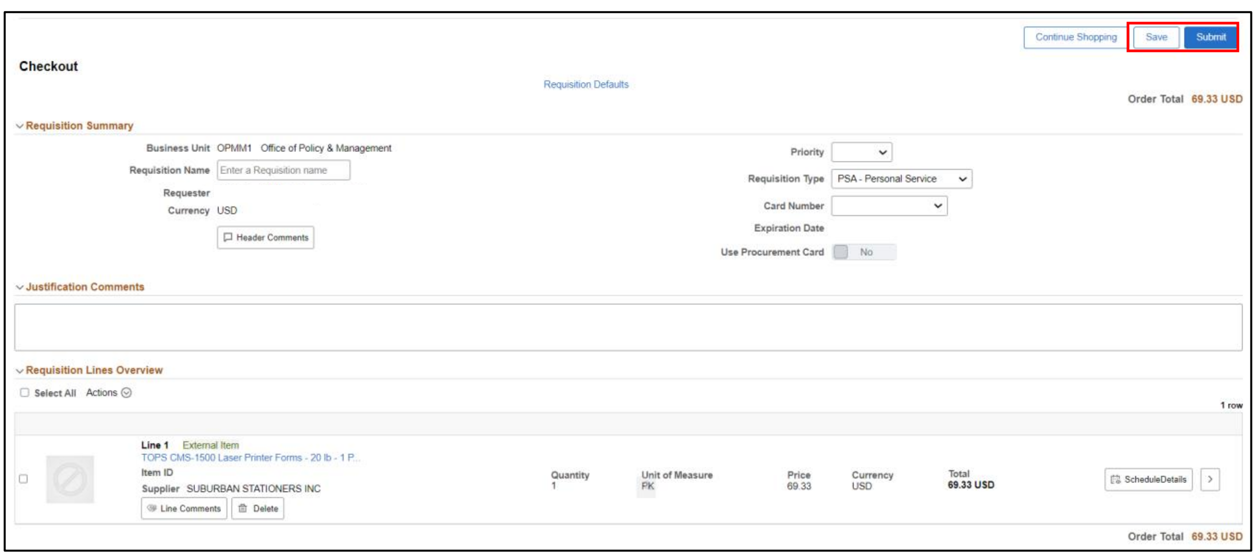


11. The Requisition Lines display.

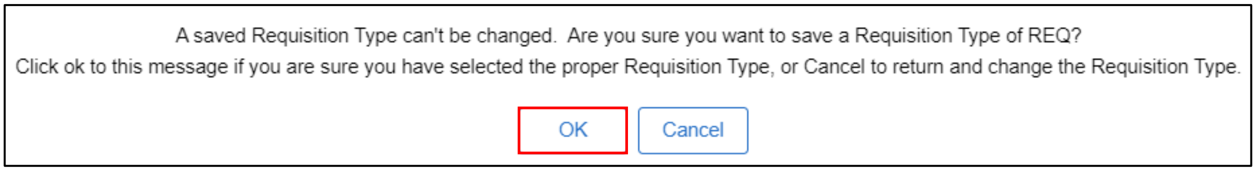


12. Follow steps 19-31 starting on page 9 to add the following if needed:
   a Justification
   b Header and/or Line Comments
   c Header and/or Line Attachments

13. Review requisition for accuracy, and click Submit



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



15. A Confirmation Page displays