Create and Submit a Requisition

**** More detailed training is available online by signing-in to PeopleSoft and navigating to Training Links>Financials Online Training.***

To Complete a Requisition you will need:

- Correct Speed Code and account
- Item descriptions, quantities and prices

Step	Action
1.	Click the **Create Requisition** Create Requisition link on the Self-Service Menu. If you do not see this link please contact your PeopleSoft Administrator and request the **ZEP_DEPT_REQUESTER_ENTRY** role. There are some fields that default with standard data. There are other fields that are unique to each Requisition and must be entered by the Requester.
2.	**OPTIONAL STEP:** The **Requisition Name** field is not required. PeopleSoft has auto-numbering capability and the **Requisition Name** field will populate with a Requisition ID number when it is saved. However Departments may use specific naming or numbering for tracking Requisitions internally. The **Requisition Name** can be used for this purpose.
3.	**OPTIONAL STEP:** The Vendor field is not a required field but is often entered by the Requester. If you have the Vendor number you can key it in this field. To look up a **Vendor** click the **Vendor Lookup** button. The search will provide a list of **Vendors** with the default ordering address.
4.	Click in the **Name** field. Enter Vendor name Click the **Find** button. Find ***Tip:*** *This search field is not case sensitive. Try using partial searches e.g. "XYZ" instead of "XYZ Canada Inc" to yield more results to choose from.*
5.	If the Vendor is not in the database, then click on Return to Define Requisition. Vendor information can be added in the Comments field on the Review and Submit page.
6.	The **Attention** field is used as part of the delivery address and will default with the Requester's name. If you are keying a Requisition on behalf of someone else or the items you are ordering should be delivered to someone else then you can change the name in the **Attention** field.
7.	To add departmental information, click the **Delivery Information** link. Delivery Information ***Note:*** *Shipping Information will default to Central Receiving as all deliveries to the University are delivered centrally. Central Receiving then delivers the goods to the room and building listed in the Delivery Information section.*
8.	Enter information in the **Room & Building, Department and Phone** fields. Click the **OK** button.

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9.	Enter information in the **SpeedCode** field. e.g. "**TST02**". ***Tip:*** *A SpeedCode is just a quick way to enter the **Chartfield** string (GL Unit,Fund, Dept, Program, Class for operating funds and add PC Business Unit, Project,Activity and Sponsor for research funds. If you do not have a SpeedCode you can key the appropriate **Chartfield** string.*
10.	Enter information in **Account** field. If you do not know the Account to use you can search for the information. Click the **Look up Account** button.
11.	Click the **Continue** button.
12.	The **Add Requisition Lines** link will take you to the **Add Items and Services** page where you will add your line details. Click the **Add Requisition Lines** link. Add Requisition Lines
13.	The requisition line item description for each line should be a detailed description of the item being requested. You can also include further information by entering text into the Comments or by using attachments.
14.	Enter information into the **Description** field. e.g. "**Digital Microscope AMG-EVOS123**".
15.	Enter information into the **Quantity** field e.g. "**1**".
16.	UOM and Category fields will default populated with EA and ALL. ***Note:*** *The UOM should be changed to reflect the standard ordering unit for the item. Category field can remain as ALL. This field is only used by Requesters for radioactive materials and separate training materials are available.*
17.	Enter information into the **Price** field e.g. "**3300**".
18.	To add another item, click the **Add a new** button. Repeat steps 17 to 20 for each line.
19.	Once you have completed adding your Requisition lines. Click the **OK** button.
20.	You will see a Requisition Summary with a Total Amount of your lines in the upper right corner. Click the **Review and Submit** link. Review and Submit.
21.	You can add line specific comments or additional line information at the line level by selecting the **Add/Edit Comments** icon located at the end of each Requisition line.
22.	Add general comments or information in the Comments field. For example, you would add vendor information in this field if you were unable to find the vendor or address through the vendor search process. If you have added comments for the Approver select the Approval Justification checkbox.
23.	Additional comments may be added and documents may be attached to the Requisition. Click the **Attachments & Comments** link. Attachments & Comments
24.	For additional comments click the **Add a new** button.
25.	Click in the **Comments** field.

Step	Action
26.	Enter information into the **Comments** field. Enter a valid value e.g. "**As per quote XYZ-123**".
27.	To add an attachment, click the **Add Attachments** button. Click the **Browse...** button.
28.	You will have to navigate to where you have saved the file you would like to attach. Select the file and then **Upload**.
29.	The SpeedCode and Account information added on the first page "Define Requisition" creates the distribution for each Requisition line. If you wish to change the Account for a specific line, click the **Expand Section** button. You can key the change directly into the Account field.
30.	Click the **Save** button.
31.	Review the completed Requisition as a pdf. Click the **View Printable Version** link. View Printable Version
32.	You can review the print copy of the Requisition with or without the SpeedCode / Chartfield information. Click the **Yes** button to see the distribution information. Close the PDF if you have ensured it is correct and complete.
33.	Click the **Save & Preview Approvals** button. This will show the electronic routing for approvals. Click the **Submit** button. If you are the Budget Owner for the SpeedCode the Requisition will be automatically approved without further steps. **Note:** A PDF copy of the printable version will be e-mailed to the Approver when the Requisition is submitted for approval.
34.	Congratulations! You have now completed the training on how to create and submit a Requisition using navigation from the Self-Service Center.