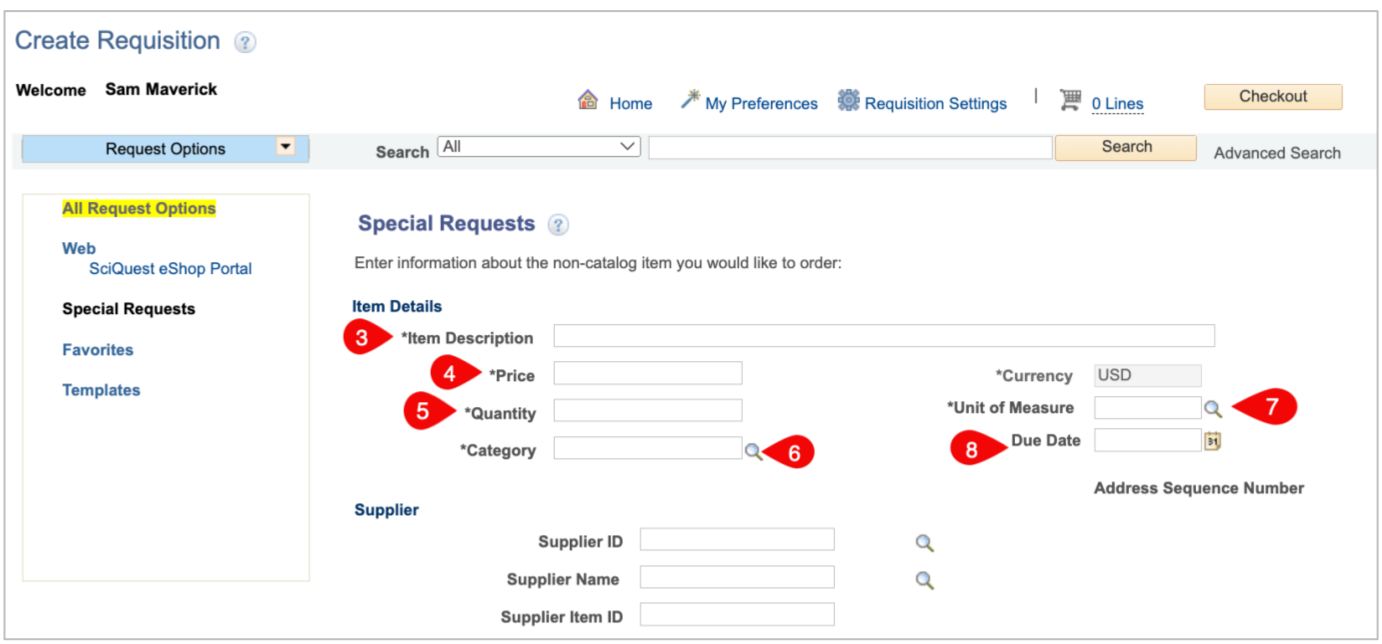
Special Item Requisition

The purpose of this job aid is to explain how to Create a Requisition using the Special Item Request Form. The Special Item Request page is used to request the purchase of goods and/or services that are not available through the online catalog. This process involves manually entering line-item information directly into the form fields. The information used for this form will be obtained from a quote, catalog, or other source of pricing. All line items on the source of pricing should be reflected on the Requisition. If you get a discount from a Supplier, you will need to ask for a new source of pricing with the discount built into each line-item price, or you can apply the discount to the Voucher.

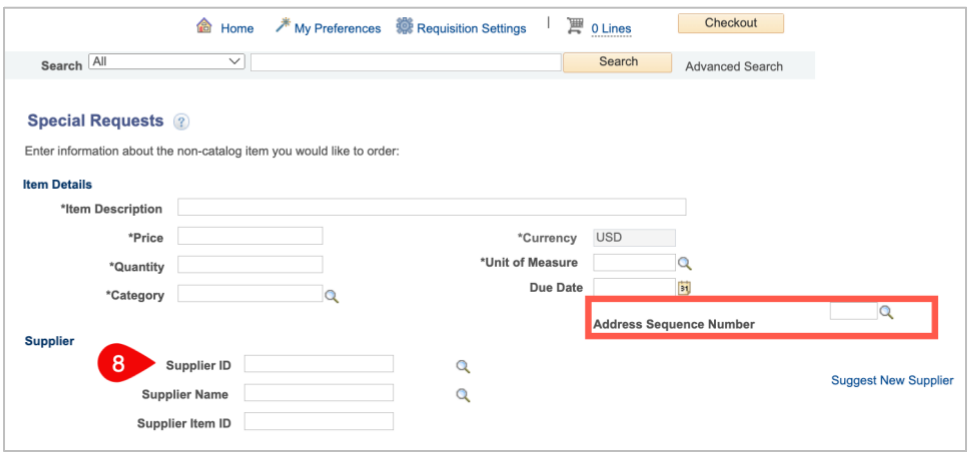
1. To navigate to the Create Requisition page select the **Procurement Operations Homepage** and click on the **Requisition** tile.

   Alternatively, navigate to the Create Requisition page using the Navigation path: **NavBar > Menu > Financials > eProcurement > Create Requisition.**

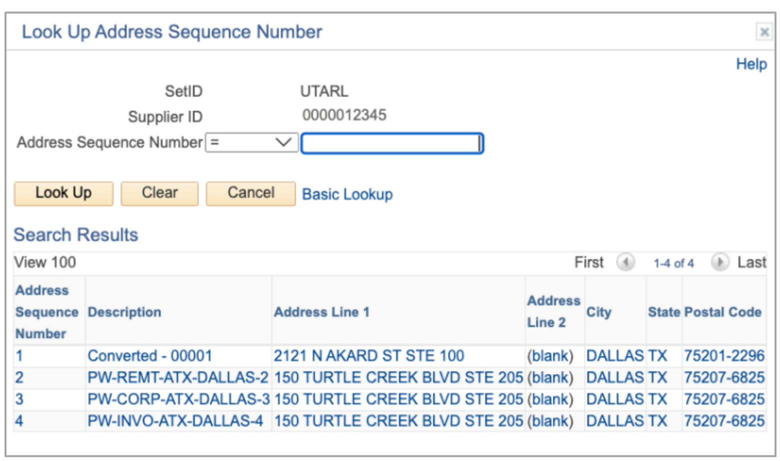
2. The Special Request Page is displayed.



3. In the **Item Description** field provide a brief description of the good or service you want to purchase.
4. In the **Price** field enter the dollar amount of the good or service being purchased.
5. In the **Quantity** field enter the number of units being purchased.
6. Enter or look up the **Category** code. This code is used to identify the item you are purchasing.
7. The **Due Date** field indicates the date you need to receive the item. If left blank, this field will default to the current date.
8. Enter or look up the **Supplier** identification number. If the Supplier has multiple locations, make sure to select or enter the correct **Supplier Location.**
    a. If the supplier address populated does not match the source pricing, click on the **magnifying glass** to the right of the **Address Sequence Number** to choose the correct address.



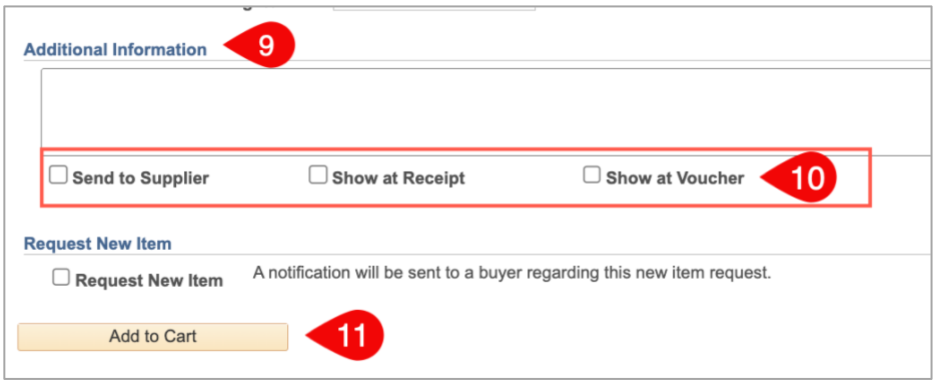
    b. Select the correct Supplier address starting with PW-REMT.



Address Sequence Number	Description	Address Line 1	Address Line 2	City	State	Postal Code
1	Converted - 00001	2121 N AKARD ST STE 100	(blank)	DALLAS	TX	75201-2296
2	PW-REMT-ATX-DALLAS-2	150 TURTLE CREEK BLVD STE 205	(blank)	DALLAS	TX	75207-6825
3	PW-CORP-ATX-DALLAS-3	150 TURTLE CREEK BLVD STE 205	(blank)	DALLAS	TX	75207-6825
4	PW-INVO-ATX-DALLAS-4	150 TURTLE CREEK BLVD STE 205	(blank)	DALLAS	TX	75207-6825

9. The **Additional Information** text box is used to enter comments or remarks related to the item or service (e.g., item specification, or discounts).

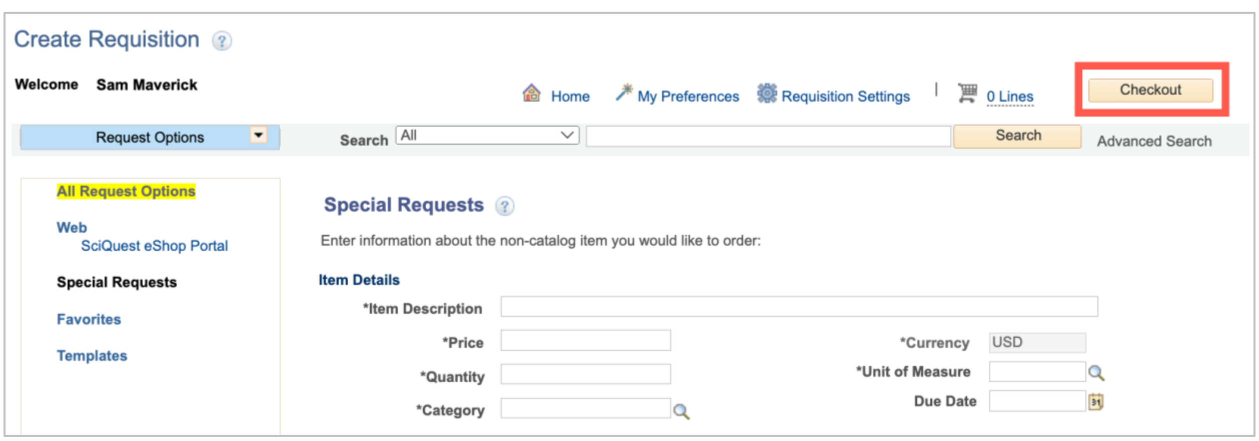
10. If comments are entered, select the appropriate check box to make the remarks available for others to view:
    a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier to view.
    b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
    c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable to view.
11. Once the information has been entered, click the **Add to Cart** button.



12. A blank **Special Item** request page is displayed. If necessary, enter the next line item for the requisition.

    Note: *The cost of* **Shipping and Handling** *should be added as a separate line item on the requisition. You should use category code* **78121603 for freight fees and Lot** *for the Unit of Measure.*
13. Once you have entered all the line items, click the Checkout button to proceed to the next section.

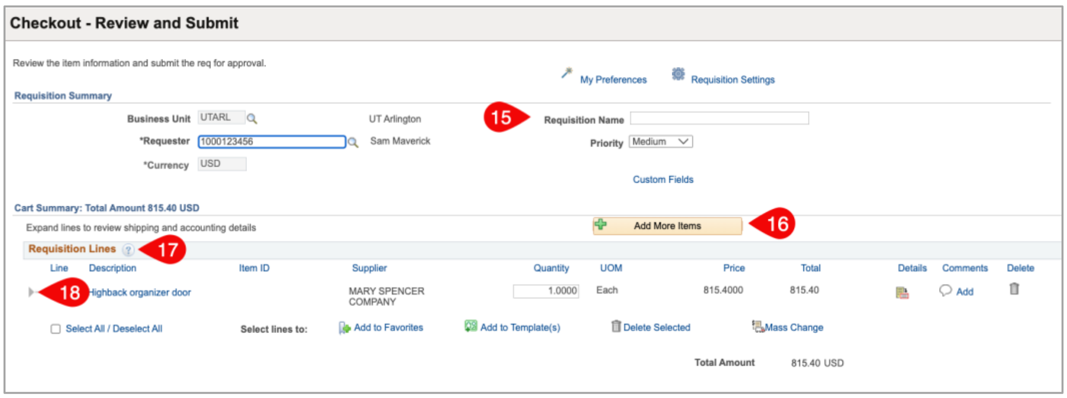
    Note: *Do not enter discounts on the Requisitions, request a new source of pricing from the supplier with the discount built into each line-item price, or you can apply the discount on the Voucher.*



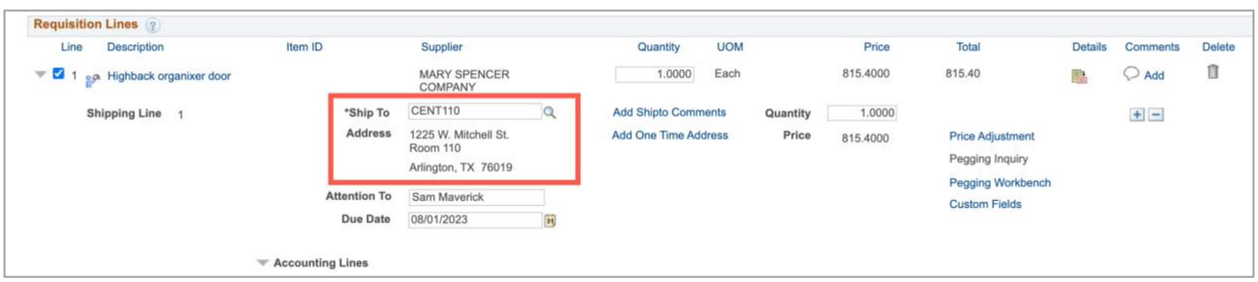
14. The **Checkout - Review and Submit** page provides a summary of the line-item information that

was entered on the requisition. This page allows you to review the details of your requisition, make any necessary changes and submit it for approval.

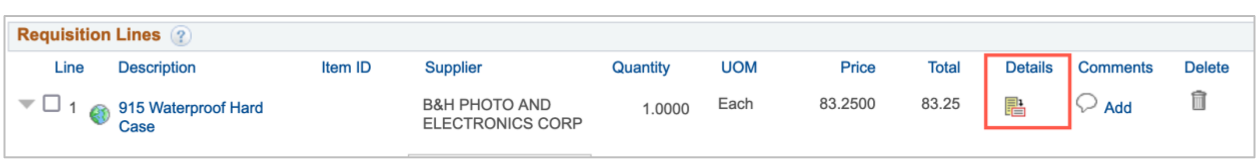
15. Click in the **Requisition Name** field and enter a name for the requisition.
16. If more requisition lines need to be entered, use the **Add More Lines** button to return to the Special Request page.
17. The **Requisition Lines** section provides specific details for each line such as the item description, quantity, and price. If necessary, you can change a line item from this section. In addition, this section is used to add or update chartfield information for each line.
18. Click the **Expand Section** button to add chartfield information for **Line Item 1.**



19. The **Ship To** field defaults with Property Management ship to code. Update if necessary.

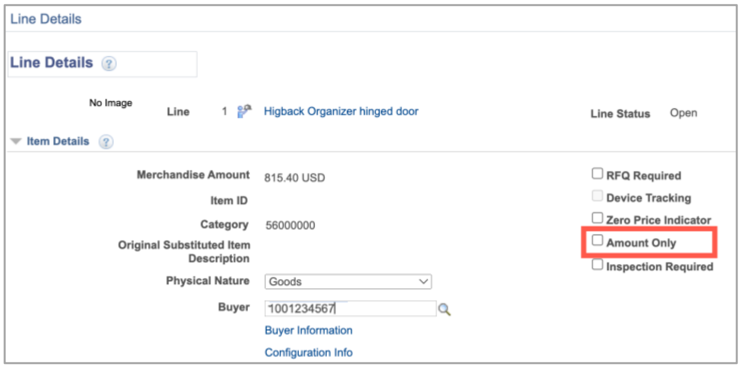


20. If there is an expectation that a specific line item will involve multiple invoices/payments with different dollar amounts and the Quantity is **1** the line should be set up as **Amount Only.** This option is intended for requisition lines involving services that you want to base on the dollar value, rather than the quantity when making a payment. Line items with a unit of **LOT** should use this option.
    a. To flag an item as **Amount Only**, click on the **Line Details** icon, and click the box for **Amount Only.**



b. Enter or look up the **Buyer** ID number for the Procurement buyer for your department. You can also input the Buyer on the Mass Change screen.

   i. Your Buyer can be found on the Procurement Specialist (Buyer) Page from the Procurement website.



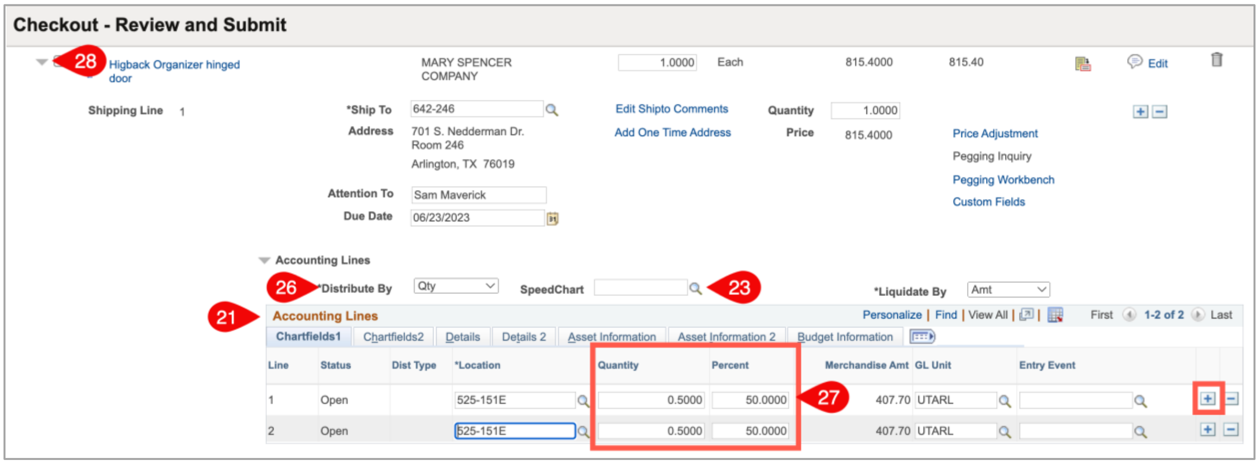
21. Click **OK** to return to the Checkout – Review and Submit page.
22. The **Accounting Lines** section is used to enter or update chartfield information. It may be necessary to use the expansion arrow to open the Accounting Line section.
23. Enter the remaining chartfield values for the requisition line. You can manually enter the values into the appropriate fields (e.g., Fund, Dept, Cost Center, Function) or use the **SpeedChart** field to quickly populate the accounting lines.
24. Click in the **SpeedChart** field. Enter the **SpeedChart** you want to use for the expense line**.** SpeedChart values are either the 6-digit cost center number, 10-digit project ID, or 10-digit cost share ID.

Press **[Tab]** on your keyboard to populate the chartfields with the appropriate values.

25. If the line item is to be charged to multiple funding sources, use the **Distribute By** field to indicate if the split will be made by **Quantity** or **Amount**.

Enter on the Chartfields1 tab the quantity, **percentage**, or **amount** to be paid by the first fund. Use the **+** button to add another chartfield line and enter the quantity, percentage, or amount appropriately. Add as many lines as necessary. Then enter the chartfield values on the Chartfields2 tabs.

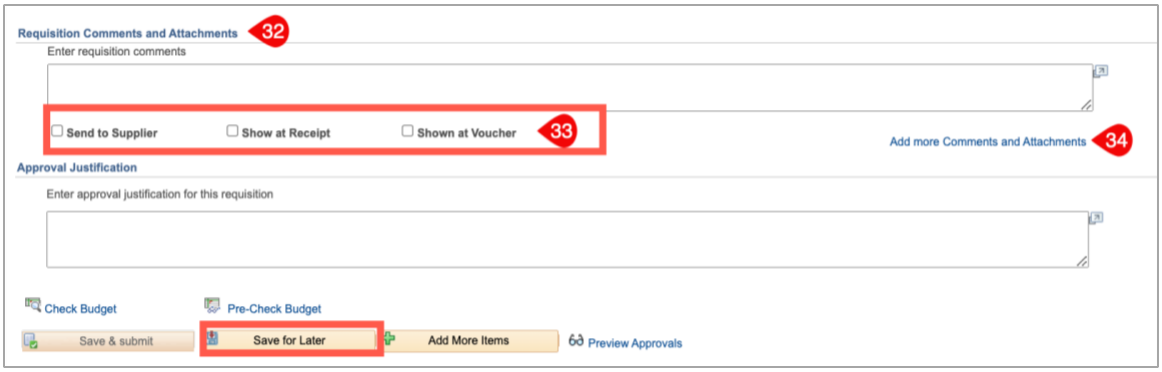
26. Click the **Collapse Section** button to close the requisition line.



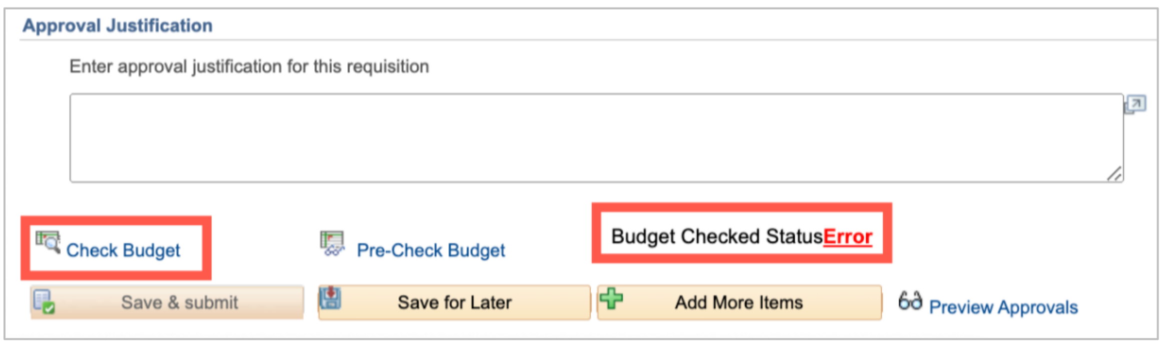
27. The **Mass Change** option can be used to enter the same information on multiple lines at once. To use this function, select the requisition line items on which the information should be entered, then click **Mass Change.** You can enter:
    a. Enter or look up the **Buyer** ID number for the Procurement buyer for your department.
        i. Your Buyer can be found on the [Procurement Specialist (Buyer) Page]() from the Procurement website.
    b. Ship to address
    c. Speed chart
    d. Once you have entered all the desired information and click **OK**.
28. Complete the line information for all requisition lines.
29. The **Shipping Summary** will display the Ship To Address information. There should only be one shipping address used on all requisition lines.
    a. If the Shipping Summary section states that **Multiple values exist,** use the **Edit for All Lines** link to update the Ship To Address for all lines.
30. The **Requisition Comments and Attachments** section is used to enter Comments that apply to the entire purchase. In this section, enter UTA and vendor contact information, and final delivery information such as: who should receive the item(s), the building, and the room where they are located.
31. If comments are entered, select the appropriate check box to make the remarks available for others to view (if desired):
    a. The **Send to Supplier** checkbox is used to print the comments on the purchase order for the supplier to view.
    b. The **Show at Receipt** checkbox is used to make the comments available to the person receiving the item.
    c. The **Show at Voucher** checkbox is used to make the comments available on the voucher for Accounts Payable to view.
32. The Requisition must be accompanied by the appropriate support documentation. The **Add More**

Comments and Attachments link is used to add attachments and/or comments to the requisition. The source pricing can be a quote, a screenshot of the catalog, a copy of the item on the supplier's website, an email, or a fax from the Supplier.

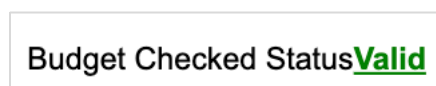
33. Click the **Save for Later** button.



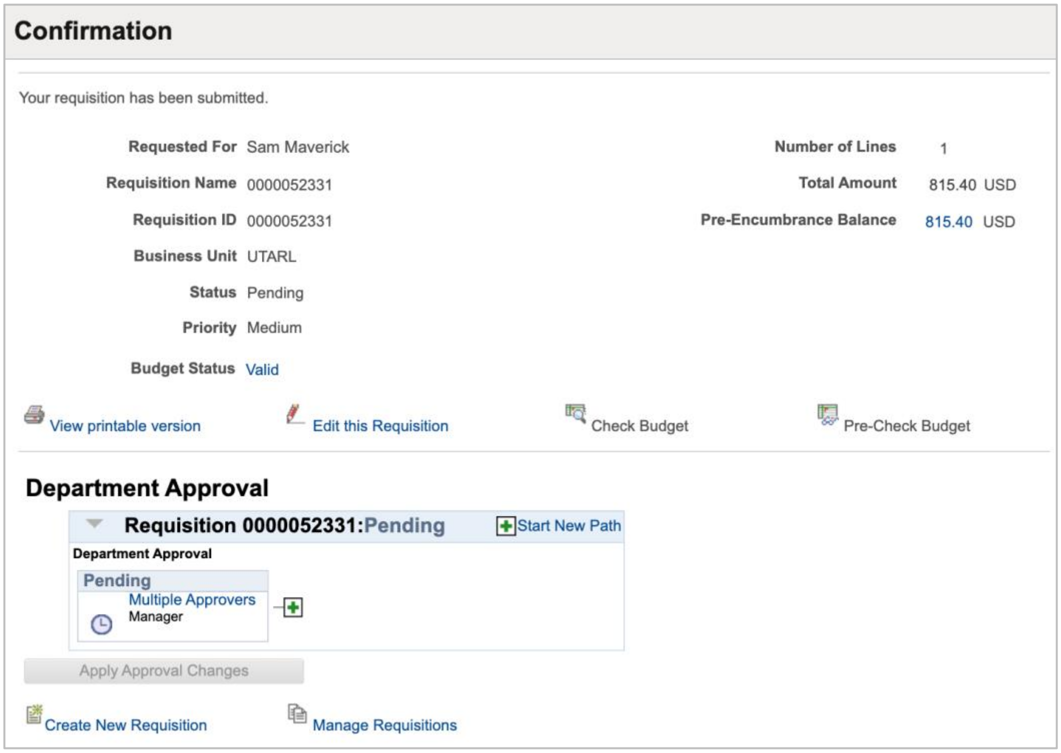
34. Click the **Check Budget** link. This will verify if the funding sources entered on the Accounting lines have the funds to pay for the purchase.



   a. If the Budget Checking Status returns as **Error**, click the word **Error** to investigate and resolve the error. Once the necessary changes are made, again click the Check Budget link. A requisition must be in a **Valid** budget check status to be submitted.
   b. If the Budget Checking Status returns as **Valid**. The dollar amount of the requisition has been successfully **Budget Checked** and **Pre-Encumbered.**



35. Once all requisition lines have been entered and a valid budget check obtained, click the **Save & Submit** button to submit the requisition for Workflow approvals.


Confirmation
Your requisition has been submitted.
Requested For Sam Maverick
Requisition Name 0000052331
Requisition ID 0000052331
Business Unit UTARL
Status Pending
Priority Medium
Budget Status Valid
Number of Lines 1
Total Amount 815.40 USD
Pre-Encumbrance Balance 815.40 USD
View printable version
Edit this Requisition
Check Budget
Pre-Check Budget
Department Approval
Requisition 0000052331:Pending
Start New Path
Department Approval
Pending
Multiple Approvers
Manager
Apply Approval Changes
Create New Requisition
Manage Requisitions