

## **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.

Procurement Operations ~			< 6 of 1
Commitment Control	als	Requisition	Manage Requisitions
Procurement Operations			
Project Mgmt, Billing & AR			
Treasury			
Accounts Payable	0		

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

2. The Special Request Page is displayed.

Create Requisition @		
Welcome Sam Maverick	Abome <sup>★</sup> My Preferences <sup>●</sup> Requisition Settings <sup>●</sup> <sup>●</sup> <sup>●</sup> <sup>0</sup> Lines <sup>●</sup>	neckout
Request Options	Search All V	nced Search
All Request Options Web SciQuest eShop Portal Special Requests Favorites Templates	Special Requests ② Enter information about the non-catalog item you would like to order: Item Details 3 *Item Description 4 *Price 5 *Quantity *Currency *Currency USD *Unit of Measure *Category *Category *Category *Category	7
	Address Sequence N Supplier	umber
	Supplier ID Q	
	Supplier Name	



- 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.

	🙆 Home	* My Preferences	Requisition Settings	۳. I	0 Lines	Checkout
Search	~				Search	Advanced Search
Special Requests	?					
Enter information about the	non-catalog iten	n you would like to orde	er:			
Item Details						
*Item Description						
*Price			*Cu	irrency	USD	
*Quantity			*Unit of N	leasure		Q
*Category		Q	0	ue Date	_	31
					Address Se	quence Number
Supplier 8	un aller ID		Q			
	upplier ID					
	ier Name		Q			
Suppli	er Item ID					

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

LOOK U	p Address Sequence N	umber				
						Hel
	SetID	UTARL				
	Supplier ID	0000012345				
Address S	Sequence Number =	$\sim$				
Look U	p Clear Cance	Basic Lookup				
O	Desculto					
Search H	Results					
	Results		F	irst 🕢	1-4 o	f4 🕑 Las
View 100 Address Sequence	Description	Address Line 1	F Address Line 2	irst 🕢 City		
View 100 Address Sequence		Address Line 1 2121 N AKARD ST STE 100	Address		State	Postal Code
View 100 Address Sequence Number 1	Description Converted - 00001		Address Line 2 (blank)	City	State	Postal Code 75201-2296
Search F View 100 Address Sequence Number 1 2 3	Description Converted - 00001 PW-REMT-ATX-DALLAS-2	2121 N AKARD ST STE 100	Address Line 2 (blank) (blank)	City	State TX TX	f 4 ) Las Postal Code 75201-2296 75207-6825 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.

Show at Receipt	□ Show at Voucher 10
ation will be sent to a buyer	r regarding this new item request.
<b>(1)</b>	
	ation will be sent to a buyer

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.

Create Requisition ②						-	
Welcome Sam Maverick		lome 🙆	* My Preferences	Requisition Settings	Ĩ	0 Lines	Checkout
Request Options	Search All	$\sim$				Search	Advanced Search
All Request Options Web SciQuest eShop Portal Special Requests	Special Requests		n you would like to ord	er:			
Favorites	*Item Description						
Templates	*Price			*Curr	rency	USD	
	*Quantity			*Unit of Mea	asure		Q
	*Category		Q	Du	e Date		31

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.

Checkout - Review and S	ubmit								
Review the item information and submit the Requisition Summary	req for approval.		* M	y Preferences 🔅 I	Requisition Settin	igs			
Business Unit	UTARL Q	UT Arlington	15 Requisitio	n Name					
*Requester	1000123456	Q Sam Maverick		Priority Medium V					
*Currency	USD			Custom Fields					
Cart Summary: Total Amount 815.40 USE	<b>)</b>					•			
Expand lines to review shipping and acc	ounting details			Add More Iten	ns	16			
Requisition Lines @									
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
Highback organizer door		MARY SPENCER COMPANY	1.0000	Each	815.4000	815.40		🖓 Add	Û
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selected	1	Mass Change			
					Total Amount	815.40 USD			

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

Line Description	Item ID	Supplier		Quantity UOM		Price	Total	Details	Comments	Delete
<ul> <li>I Potenpilon</li> <li>Highback organizer door</li> </ul>		MARY SPENCER COMPANY		1.0000 Each		815.4000	815.40		⊘ Add	1
Shipping Line 1	*Shij	To CENT110	Q	Add Shipto Comments	Quantity	1.0000			+	
	Add	ress 1225 W. Mitchell St. Room 110 Arlington, TX 76019		Add One Time Address	Price	815.4000	Price Adjustment Pegging Inquiry			
	Attentio	To Sam Maverick					Pegging Workbench Custom Fields			
	Due I	08/01/2023	1				ousion rious			
	Accounting Lines									

- 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**.

Requisition	Lines 🕐									
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▼□1 🌒	915 Waterproof Hard Case		B&H PHOTO AND ELECTRONICS CORP	1.0000	Each	83.2500	83.25		🖓 Add	Î



- 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 <u>Procurement Specialist (Buyer) Page</u> from the Procurement website.

Line Details		
Line Details 👔		
No Image Line 1 🚰	Higback Organizer hinged door	Line Status Open
▼ Item Details ②		
Merchandise Amount	815.40 USD	RFQ Required
Item ID		Device Tracking
Category Original Substituted Item Description	56000000	Zero Price Indicator     Amount Only     Inspection Required
Physical Nature	Goods ~	<ul> <li>Inspection Required</li> </ul>
Buyer	1001234567 Q Buyer Information	
	Configuration Info	

- 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.



Checkout - Review and Sub	mit												
Higback Organizer hinged door				RY SPENCER MPANY	ł	1.0000	Each		815.4000	815.40	L <sub>e</sub>	l (P	Edit
Shipping Line 1		*Shi	р То 642-2	246	Q	Edit Shipto Comr	nents Qua	antity	1.0000			+	-
		Add	Roon	5. Nedderman I n 246 gton, TX 76019		Add One Time Ad	ldress I	Price	815.4000	Price Adjus Pegging In Pegging W	quiry		
		Attentio	n To Sam	Maverick						Custom Fi			
		Due	Date 06/23	3/2023	Ħ								
Accounting Lines       26     Distribute By     Oty     SpeedChart     Q<23													
21		ting Line								ze   Find   View Al	🛛   🔣	First 🕚 1	1-2 of 2   Last
-	Chartfie	elds1 C	hartfields2	Details D	etails 2 Asse	t Information Asse	t Information 2	Budget	Information				
	Line	Status	Dist Type	*Location		Quantity	Percent	м	lerchandise Amt	GL Unit	Entry Event		
	1	Open		525-151E	٩	0.5000	50.0000	2	407.70	UTARL		٩	• =
	2	Open		525-151E	٩	0.5000	50.0000		407.70	UTARL	2	Q	+ -

- 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 <u>Procurement Specialist (Buyer) Page</u> 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.

Requisition Comments and Attac	chments 32			
Enter requisition comments				[ <b>3</b> ]
				le le
Send to Supplier	☐ Show at Receipt	Shown at Voucher	3	Add more Comments and Attachments
Approval Justification				
Enter approval justification for	r this requisition			3
				(2)
Check Budget	Pre-Check Budget			
Bave & submit	Save for Later	순 Add More Items	60 Preview Approvals	

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.

Approval Justification			
Enter approval justification	for this requisition		
			7
Check Budget	Pre-Check Budget	Budget Checked StatusError	]
Save & submit	Save for Later	Add More Items	රිථ Preview Approvals

- 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.

Budget Checked StatusValid

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.



ur requisition has been submit	tted.			
Requested For	Sam Maverick		Number of Lines	1
Requisition Name	0000052331		Total Amount	815.40 USD
Requisition ID			815.40 USD	
Business Unit	UTARL			
Status	Pending			
Priority	Medium			
Budget Status	Valid			
View printable version	Edit this Requisition	Check B	udget Pre-Chec	k Budget
epartment Approv	val			
	0000052331:Pending	Start New Path		
Department Approval				
Pending				
Multiple Approve Manager	ers –			