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Purchasing Hands-On Requisition Training

Job Aid
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ENTERING REQUISITIONS

SHORT GUIDE TO ENTERING ONLINE REQUISITIONS

Step 1: Navigate to the Requisition page
Step 2: Add Requisition Criteria
Step 3: Verify Requisition Header Information
Step 4: Vendor Selection
Step 5: New Vendor Request
Step 6: Add Items/Lines to the Requisition
Step 7: Modify Accounting Distribution (Optional)
Step 8: Finalize Requisition
Step 9: Navigate to Workflow
Step 10: Initiate Workflow Process
**STEP 1: NAVIGATE TO THE REQUISITION PAGE**

From the menu on the left click on:

- Purchasing
- Requisitions
- Add Update Requisitions
STEP 2: ADD REQUISITION CRITERIA
A. Click on the Add a New Value tab.
B. Select the Business Unit for this Requisition. **Ensure that your correct Business Unit is identified in this field!!!** (TAMPA, LKLND, PPLNT, STPTE, SRSTA)
C. Allow the Requisition ID to default to ‘NEXT.’ (Do not enter any data in this field)
D. Click on Add to get to the Requisition Form page.
STEP 3: VERIFY REQUISITION HEADER INFORMATION

Req Date = Current Date
Accounting Date = Current Date

NOTE: Do Not Change Any Dates.

Origin will default as “ONL”
Requestor will default from your User ID.

STEP 4A: VENDOR & CHARTFIELD SELECTION TEMPLATE

A. Click on the Requisition Defaults hyperlink.
B. Click on the Vendor Lookup hyperlink to select a Vendor. Step 4B on page 5.
C. Enter Chart field String information leaving the Account field blank. DO NOT enter the Account number on the Chart field String.
D. Click on the OK button at the bottom of this page to return to the Maintain Requisitions page.

Note: Do not fill in Account Number
STEP 4B: VENDOR SELECTION

A. Enter the first several characters of a Vendor name in the Name field.
B. Click on the Search button.
C. Select the vendor by click in the Sel check box next to the vendor.
D. Verify the address by using the Address hyperlink.
E. Click OK.

NOTE: If you cannot locate the vendor, it may need to be added to the system. New vendors can only be added by Purchasing. Use Header Comments to add information for new vendors in Step 5. If you found a vendor, then skip to Step 6.
**STEP 5: NEW VENDOR REQUEST**

A. On the maintain requisitions page, click on the **Add Comments** hyperlink.
B. Click on the **Copy Standard Comments** hyperlink.
C. Click on the **Std Type** hyperlink, from the list choose **REQ**
D. Click on the **Comment ID** hyperlink, choose **NEWV** from the list.
E. Click **OK**. This will paste the New Vendor comment into the Header Comments page.
F. Fill in the required information in the Comments section. Do Not check any of the boxes below your request.
G. Click on the **OK** button when finished.

*Do Not Check any of the Boxes!!!*
**Step 6: Add Line Items to the Requisition**

A. In the Line section of the Maintain Requisition page:
   1. Enter a description of the purchase in the Description field.

B. Enter the quantity to be ordered in Quantity.

C. Click on the icon in the UOM (Unit of Measure) field and select the appropriate value (i.e. EA, CS, DZ, etc).

D. Click on the icon in the Category field and select the appropriate value.

E. Enter the unit price of the item in Price.

F. To enter additional items, click on the to the right of the requisition line. (Only one (1) item is allowed per line)

G. In the dialog box that appears, enter the number of lines to be added and click OK.

H. Continue adding information on the additional lines per above instructions.

I. Click Save at this point. Req ID will change from NEXT to an assigned number.
**STEP 7: MODIFY ACCOUNTING DISTRIBUTION (OPTIONAL)**

A. Click on the Schedule icon at the line item of the maintain requisition page.

B. Click on the icon to see the line distribution.
STEP 7 continued: MODIFY ACCOUNTING DISTRIBUTION (OPTIONAL)

C. The chart field string defaults from the Header Default Template and can be changed. The cost can be split by using + at the far right of the Distributions section (scroll to the right to access + icon).

D. The chart field String can be distributed in the following ways: **Req Qty, Dollar Amount**, or by **Quantity**. Make sure to fill in second chartfield properly.

E. Click **OK** to return to the Distribution Page

F. Click **Save** to save the additional information.
**Step 8 “Approve” & “Budget Check”**

**Requisition for Workflow**

A. Click on ☑️ to Approve the Requisition – Status changes to “Pending”

B. Click on 🗳️ to Budget Check the Requisition – Status changes to “Valid”
STEP 9: NAVIGATE TO APPROVE AMOUNTS FOR WORKFLOW

From the main menu tab click on:

**Purchasing**
- **Requisitions**
- **Approve Amounts**

A. Enter requisition number
B. Click Search
**STEP 10: INITIATE WORKFLOW PROCESS**

A. Add comments to be reviewed by the approver
B. Click Save to approve requisition as the Requisition Initiator
C. You will get a message saying Req Approver is required. Click OK

Note: Approval Status will change from Initial to In Process once a save is done.**
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Approving Requisitions—Req. Approvers/Managers

SHORT GUIDE TO APPROVING REQUISITIONS

Step 1: Access Worklist
Step 2: Approve Requisitions

Note: For Requisitions with multiple distributions or to reassign requisition to another approver, see page 13.
**STEP 1: ACCESS WORKLIST**

A. Click on the **Worklist** link in the header area.

B. From the retrieved list, select the requisition you wish to approve by clicking on the blue hyperlink for that requisition in the **Link** Column.

C. A returned Requisition will appear back in your worklist like this. Click on the link to view why it was recycled.
STEP 2: APPROVING REQUISITIONS

A. Select the appropriate approval action from the drop down box. Valid values are:
   - Approve – approves the requisition to the level that you are authorized.
   - Deny – routes the requisition back to the initiator for further action
   - Recycle – routes the requisition back one level in the workflow process

B. Click on Save. If you are not the final approver, you will receive a message asking if you want to move the requisition to the next level in workflow. Click OK.

C. If you are the final approval, the Approval Status will change to “Complete” unless further approval is required.

D. Click View Worklist to verify that the requisition has been moved.
Note: When a requisition needs approval from multiple departments, the requisition will only be routed to the one approver based on the first line of distribution on line 1 of the requisition.

If you need to reassign a requisition to someone else navigate to the WORKLIST. Click REASSIGN next to the requisition you need to reassign. Enter the USER ID and COMMENT and click on OK. Verify requisition is no longer on your worklist.
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RECEIVING
SHORT GUIDE TO RECEIVING

Step 1: Navigate to Add/Update Receipts
Step 2: Navigate to Pick Purchase Order Page
Step 3: Identify PO to be Received Against
Step 4: Record the Receipt
Step 5: View PO Comments
Step 6: View Receipt Lines
Step 7: Save the Receipt
Step 8: Print the Receipt
**STEP 1: NAVIGATION TO MAINTAIN RECEIPTS**

From the main menu tab click on Purchasing
Receipts
Add/Update Receipts

**STEP 2: NAVIGATE TO PICK PURCHASE ORDER PAGE**

A. Allow the Receipt Number to default to 'NEXT'.
B. Click on the Add button
C. These actions will take you to the Select Purchase Order page.
STEP 3: NAVIGATE TO PICK PURCHASE ORDER PAGE

A. Enter the PO ID if known, or use the remaining criteria to minimize your search.
B. Click on Search to display PO lines. (Do not use the enter key for this function.)
C. Check in the Sel Box to choose the line item to receive against.
D. Click OK to go to the Receiving Page.
STEP 4: RECORD THE RECEIPT

A. Click on “Header Details” to enter the receipt date.
B. Click Save
C. Record the receipt number or Print a copy of your receipt.
STEP 6: SAVE THE RECEIPT

A. Click Save
B. Record Receipt ID or Print Delivery Report