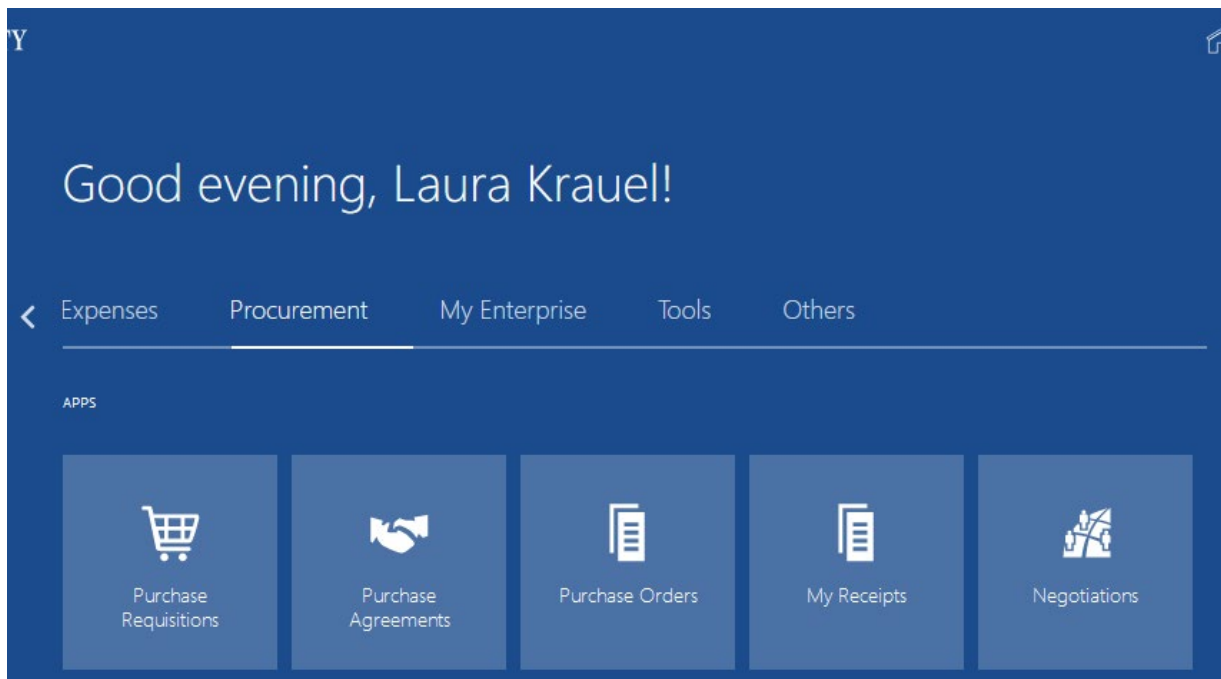
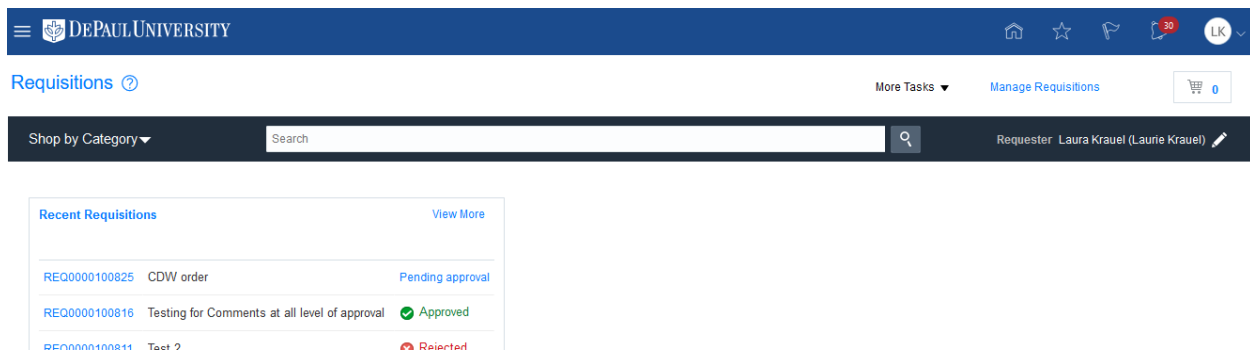


## The path to creating a requisition in >Procurement>Purchase Requisitions

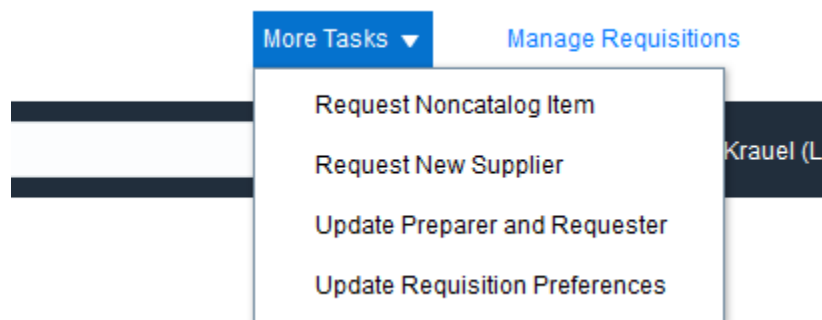


Click on Purchase Requisitions.



Click on More Tasks.

More Tasks ▼



Click on Update Requisition Preferences.

### Edit Requisition Preferences

Requisitioning BU DePaul University

#### Shipping and Delivery

\* Requester

\* Deliver-to Location

Destination Type

#### Billing

#### Projects

Project Number

Task Number

Expenditure Type

Expenditure Organization

Contract Number

Funding Source

#### Favorite Charge Accounts +

Primary	* Nickname	* Charge Account	Delete
No data to display.			

This page enables you to define the information for a new requisition. As you add items to the requisition, they appear in the Shopping Cart along with the cost center information. The fields that you enter on this page can be applied to the entire requisition at the line, shipment, or chartfield levels.

(Set Requester, Deliver to Location and Favorite Charge (Cost Center) Accounts).

Requisitioning BU DePaul University

▲ Shipping and Delivery

\* Requester Achettu, Kevin

\* Deliver-to Location 1 E. Jackson Blvd

Destination Type Expense

▲ Billing

▲ Projects

Project Number

Task Number

Expenditure Type

Expenditure Organization

Contract Number

Funding Source

▲ Favorite Charge Accounts +

Primary	* Nickname	* Charge Account	Delete
No data to display.			

Don't forget to click on Save and Close.

Purchase Request (Non Catalog)


- Purchasing Requisition Goods
- Purchasing Requisition Service

### Purchase Request (Non Catalog)

**Purchasing Requisition Goods (Template)** - Goods related purchases are billed and received based on quantity of units, rather than dollar amount.

**Purchasing Requisition Service (Template)** - Service related purchases are billed and received based on dollar amount, rather than quantity or unit.

Create Request: Purchasing Requisition Service ?

Add to Shopping List Add to Cart Done  0

Request Type Purchasing Requisition Service

Service related purchases are billed and received based on dollar amount, rather than quantity or unit

Line Type Fixed Price Services

\* Item Description

\* Category Name

\* Amount

\* Currency USD

Generate Purchase Order

Agreement

New supplier

Supplier

Supplier Site ▼

Supplier Contact ▼

Phone

Fax

Email

Create Request: Purchasing Requisition Goods ?

Add to Shopping List Add to Cart

Request Type Purchasing Requisition Goods

Goods related purchases are billed and received based on quantity of units, rather than dollar amount

Line Type Goods

\* Item Description

\* Category Name

\* Quantity

\* UOM Name EA

\* Price

\* Currency USD

Generate Purchase Order

Agreement

New supplier

Supplier

Supplier Site ▼

Supplier Contact ▼

Phone

Fax

Email

Bidding Compliance

Contract No

**Item Description** - Enter an item description. Please be specific, providing model or part and any other appropriate details.

**Category Name** - Click on the magnifying glass to access the category codes.

Search and Select: Category Name

X

▲ Search Advanced

Category Name

Description

Search Reset

Category Name	Description
No rows to display	

OK Cancel

Click the Search Button.

Category Name

Description

Category Name	Description
Advertising	Advertising
Amazon	Amazon Punch Out
Auditor Fees	Auditor Fees
Awards, Gifts & Promo Items	Awards, Gifts & Promo Items
CDW	CDW
Cable & Internet	Cable & Internet
Capital Telecom Expense	Capital Telecom Expense
Classroom Materials	Classroom Materials
Commencement	Commencement
Contract Janitors	Contract Janitors

Capital Telecom Expense	Capital Telecom Expense
Classroom Materials	Classroom Materials
Commencement	Commencement
Contract Janitors	Contract Janitors

Click on the category and click OK.

**Quantity** – Enter the quantity of items needed. (Only is you use **Purchasing Requisition Goods template**)

**Price** – Enter the price of the item as stated in a vendor catalog or quoted by the vendor.

**Unit of Measure (UOM Name)** – Define the UOM for use on this requisiton. The system will default in EA (Each). Click on the magnifying glass to bring up the list. (Only if you use **Purchasing Requisition Goods template**)

Request Type Purchasing Requisition Service  
Service related purchases are billed and received based on dollar amount, rather than quantity or unit

Line Type Fixed Price Services

\* Item Description Test

\* Category Name Domestic Travel

\* Amount 5,000.00

\* Currency USD

Generate Purchase Order

Agreement

New supplier

Supplier

Supplier Site

Supplier Contact

Phone

Fax

Email

Bidding Compliance

**New Supplier** - Add new vendor information. Click the box. Fill in the information.

New supplier

Supplier Tom Jones

Supplier Site 1313 Washington Street

Supplier Contact

Phone 312-352-5365

Fax 312-352-5366

Email tomjones@hotmail.com

**Supplier (Vendor)** - You can just start typing in the vendors name. Purchase orders will not be created unless the vendor id and vendor location are on the requisition. If you can't find the vendor you can check the box by New supplier to add in the supplier information.

Supplier

Supplier Site

Supplier cdw

Supplier Site 0000000014 CDW Government Inc

More

Or click on the magnifying glass. Type in the vendor/supplier name under Supplier.

Search

Advanced

\*\* At least one is required

\*\* Supplier

\*\* Supplier Number

\*\* Alternate Name

Search Reset

Supplier Number	Supplier	D-U-N-S Number	Alternate Name
000000081	JC Anderson Inc		

OK Cancel

Search

Advanced

\*\* At least one is required

\*\* Supplier

\*\* Supplier Number

\*\* Alternate Name

Search Reset

Supplier Number	Supplier	D-U-N-S Number	Alternate Name
000000081	JC Anderson Inc		

OK Cancel

Click on the supplier number. It has to highlight the row. Click the OK button.

### Agreement

New supplier

Supplier

Supplier Site

Supplier Contact

Phone

**Supplier Site-** View the location of the vendor. The default is based on the value that is defined for the vendor. Please make sure you have a Supplier Site location. The order will not create a Po without it.

**Bidding Compliance** - Purchases of goods or services (including contracts and master agreements) with an actual or estimated value over \$25,000, the department must conduct a competitive bid. A Bid Documentation Form must be completed and submitted as an attachment with the requisition.

Bidding Compliance



If this order is over \$25,000 click on the arrow to pick Bid Policy Compliant (Bid/MSA) or Not Bid Policy Compliant (Not Bid).

	Bid Policy Compliant	Bid Policy Compliant
	N/A	N/A
	Not Bid Policy Compliant	Not Bid Policy Compliant

Contract – Click on the arrow. Yes, you have a contract or No, you don't.

Contract



Standard Comments - Comments you may want to have on Purchase order. Click on arrow.

Standard Comments





Attachments	Attachments
Confirming Order	Confirming Order -- Do Not Duplicate.
Deliveries	VENDOR NOTE: All deliveries should...
Delivery Needs To Be Unloaded	This order requires inside delivery an...
Deposit Enclosed	Deposit Enclosed
FY Begin	DELIVERY OF THIS ORDER CANNO...
FY End	Deliveries must be made and invoice...
Holian Indemnity	ADDENDUMS: 3. The Contractor shal...
Holiday Close	DePaul University will be closed from...

Click the one you would like to add.

ms5 FY End

**Purchase Order Compliance:** After-the-Fact purchases are classified as goods/services or contracts over \$3,500 that are ordered/started before a requisition is fully approved. These types of transactions should be avoided when possible as they can present issues for DePaul University. Click the arrow if this isn't compliant.

Purchase Order Compliance

**Purchase Card Payment** – Yes or No. Click on the arrow.

Purchasing Card Payment

Future year order (Prepaid) - Click on the arrow to see account codes.

If prepaid, what expense account does this relate to?

act		
one	110000	BOA - Main Cash Account
ax	110001	UAT Only (go live map to 110001) - N...
ail	110002	BOA - Credit Cards Account
ice	110003	BOA - Depository Cash Account
act	110004	UAT Only (go live map to 110004) - N...
nts	110005	BOA - Payroll Cash Account
ice	110006	UAT Only (go live map to 110006) - IL ...
ent	110007	BOA - Student Refund Cash
	110013	BOA - Real Estate Lockbox

Search...

Click the Search button.

**Search and Select: If prepaid, what expense account does this relate to?** X

Search

Advanced

Match  All  Any

Value

Description

Search

Reset

Value	Description
-------	-------------

No rows to display

OK

Cancel

Under Value add the account code.

▲ Search

Advanced

Match  All  Any

Value

Description

Search

Reset

Value	Description
551850	UAT Only (go live map to 551850) - External Temporary Help
552205	UAT Only (go live map to 552205) - Capital Lease - Contra
552210	Space Rental
552211	Cable & Internet
552212	Off-Site Storage & Retrieval
552240	Repairs
552270	Support & Maintenance
552500	Equipment
552501	Furniture & Fixture
552502	Technology Equipment - IS & CDM

Click on the correct number.

552210	Space Rental
552211	Cable & Internet
552212	Off-Site Storage & Retrieval
552240	Repairs
552270	Support & Maintenance
552500	Equipment
552501	Furniture & Fixture
552502	Technology Equipment - IS & CDM

OK Cancel

Click OK.

If prepaid, what expense account does this relate to?  to?

Fiscal Years does this relate to. Click the arrow.

If prepaid, what fiscal years does this relate to?


If prepaid, what fiscal years does this relate to?

FY21	Financial Year 2021
FY22	Financial Year 2022
FY23	Financial Year 2023

If prepaid, what fiscal years does this relate to?  to?

Make certain all required (\*) fields are completed... Then click Add to Cart button to complete this line. The item is now displayed in the Shopping Cart and the requisition total is updated accordingly.

Create Request: Purchasing Requisition Service ?

Add to Shopping List Add to Cart Done 

Request Type

Service related purchases are billed and received based on dollar amount, rather than quantity or unit

Line Type Fixed Price Services


\* Item Description


Agreement

New supplier

Supplier

Add to Cart.

Add to Shopping List Add to Cart Done 

 **Added to Cart**

Test

Once it's added to the cart. You can start a second line by filling in the information below. Once you are done Add to Cart.

Create Request: Purchasing Requisition Service ?

Add to Shopping List Add to Cart Done 

Request Type

Service related purchases are billed and received based on dollar amount, rather than quantity or unit

Line Type Fixed Price Services

\* Item Description

\* Category Name

\* Amount

\* Currency

Generate Purchase Order

Agreement

New supplier

Supplier

Supplier Site


Supplier Contact

Phone

Fax

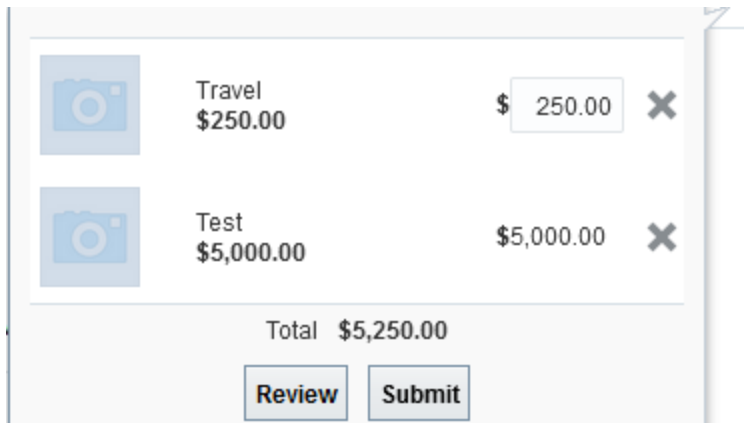
Email

Create Request: Purchasing Requisition Service ?

Add to Shopping List Add to Cart Done 

Click on Cart if you are done.

Add to Shopping List Add to Cart Done 



Click on Review.

Edit Requisition: REQ0000100826 [?](#)

[Shop](#)
[Check Funds](#)
[Manage Approvals](#)
[View PDF](#)
[Save](#)
[Su](#)

Requisitioning BU: DePaul University

\* Description:

Justification:

Requisition Amount: 5,250.00 USD  
 Approval Amount: [Calculate Amount with Tax](#)  
 Funds Status: Not reserved  
 Attachments: None [+](#)

Emergency purchase order number required

Requisition Lines

Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line.

[Actions](#)
[View](#)
[Format](#)
[Edit Multiple Lines](#)
[Freeze](#)
[Detach](#)
[Wrap](#)

Line	Description	Category Name	Quantity	UOM Name	Price	Amount	Amount (USD)	Funds Status	Delete
1	Test	Domestic Travel				5,000.00 USD	5,000.00	Not reserved	<a href="#">X</a>
2	Travel	Domestic Travel				250.00 USD	250.00	Not reserved	<a href="#">X</a>
<b>Total</b>							<b>5,250.00</b>		

Rows Selected: 1    Columns Hidden: 7

**Checkout Page** - From this page, the requestor can review the detail of the requisition, making any necessary modifications prior to budget checking, saving, and submitting the order for approval.

**Description (Requisition Name (Optional))** – Enter a description of the request to help you identify this requisition as it flows through the system.

Edit Requisition: REQ0000100826 [?](#)

[Shop](#)
[Che](#)

Requisitioning BU: DePaul University

\* Description:

Justification:

Emergency purchase order number required

## Delivery Info

Delivery

\* Requester Achettu, Kevin

Urgent No

Requested Delivery Date 1/5/2021

\* Deliver-to Location 1 E. Jackson Blvd

Deliver-to Address DePaul University, 1 East Jackson Blvd, 60604, CHICAGO, IL, UNITED STATES, Cook

Billing

You can only change the Requester name if you used the Requisition Preferences page.

**Delivery To Location** – Select the standard address to which the order must be delivered. The system defaults in your HR location it's either Loop or LPC. Please make sure you change this.

Click on the magnifying glass to access the address.

\* Deliver-to Location Loop Campus

Detach Wran

### Search and Select: Deliver-to Location

Search

Advanced

\*\* At least one is required

\*\* Name Loop Campus

\*\* Code

Search Reset

Name	Code	Address
No rows to display		

OK Cancel

Under Name try in the address you are looking for. Click the Search button.

▲ Search

Advanced

\*\* At least one is required

\*\* Name

\*\* Code

Search Reset

Name	Code	Address
2323 N. Sheffield Ave	LOC0025	DePaul Universi...
2323 N. Sheffield Ave, FL 1	LOC0124	DePaul Universi...
2323 N. Sheffield Ave, FL 2	LOC0125	DePaul Universi...
2323 N. Sheffield Ave, FL 3	LOC0126	DePaul Universi...
2323 N. Sheffield Ave, FL 4	LOC0127	DePaul Universi...

OK Cancel

Click on the address you want to use.



**Search and Select: Deliver-to Location** ✕

◀ Search Advanced

\*\* At least one is required

\*\* Name

\*\* Code

Search Reset

Name	Code	Address
2323 N. Sheffield Ave	LOC0025	DePaul Universi...
2323 N. Sheffield Ave, FL 1	LOC0124	DePaul Universi...
2323 N. Sheffield Ave, FL 2	LOC0125	DePaul Universi...
2323 N. Sheffield Ave, FL 3	LOC0126	DePaul Universi...
2323 N. Sheffield Ave, FL 4	LOC0127	DePaul Universi...

OK Cancel

Click the OK button to add it to the order.

\* Deliver-to Location  🔍


Deliver-to Address ▶ DePaul University, FL 2, 2323 N. Sheffield Ave, 60614, CHICAGO., IL, UNITED STATES, Cook

◀ Billing

View ▾ Format ▾ ✕ ↶ 🔒 Freeze 📄 Detach ↵ Wrap

Project Costing Details

Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Contract Number	Funding Source	Charge Account	* Budget Date	* Perc
<input type="text" value=""/>							100.671100.555200.65.10.0001 <span style="font-size: 0.8em;">🔗</span>	12/29/2020 <span style="font-size: 0.8em;">📅</span>	<input type="text" value=""/>
<b>Total</b>									

**Charge Account Defaults** – Please check the charge account. Click on 

Change the cost center and click OK.

▲ **Hide Segments**

Fund  ▼ Unrestricted Operating

Cost Center  ▼ Controller Operating

Account  ▼ Travel - Domestic

Activity  ▼ Institutional Support

Legal Entity  ▼ DePaul University

Program  ▼ Default Program






Future1  ▼ Default Future1





Future2  ▼ Default Future2

|

Click on the  to split between different cost centers.

▲ **Billing**

View ▼ Format ▼    Freeze  Detach  Wrap

Charge Account	* Budget Date	* Percentage	Amount (USD)	Funds Status	Delete
100.674102.555200.65.10.00000.0000.00	12/29/2020	100	5,000.00	Not reserved	
<input type="text" value="100.671100.555200.65.10.0000"/> 	<input type="text" value="12/29/2020"/> 	<input type="text"/>	<input type="text"/>	Not reserved	
<b>Total</b>		<b>100</b>	<b>5,000.00</b>		

You can split by Percentage or amount.

	* Budget Date	* Percentage	Amount (USD)	Funds Status
5.10.000	12/29/2020	50	2,500.00	Not reserved
.10.00000.0000.00	12/29/2020	50	2,500.00	Not reserved
<b>Total</b>		<b>100</b>	<b>5,000.00</b>	

Notes and Attachments

Note to Supplier

Attachments None +

Source

Agreement Type Contract Purchase Agreement

Supplier Tom Jones

Agreement

**Note to Supplier** - Enter any other useful information, such as a quote number here...

At this point, you may also want to consider adding Attachments. Click on the +.

Attachments None +

Charge Account \* Budget Date \* Percentage Amount (USD) Funds S

**Attachments** X

Actions View + X

Type	Category	* File Name or URL	Title	Description	Attached By
File	To Approver	Browse... No file selected.			Laura Krauel

Rows Selected 1

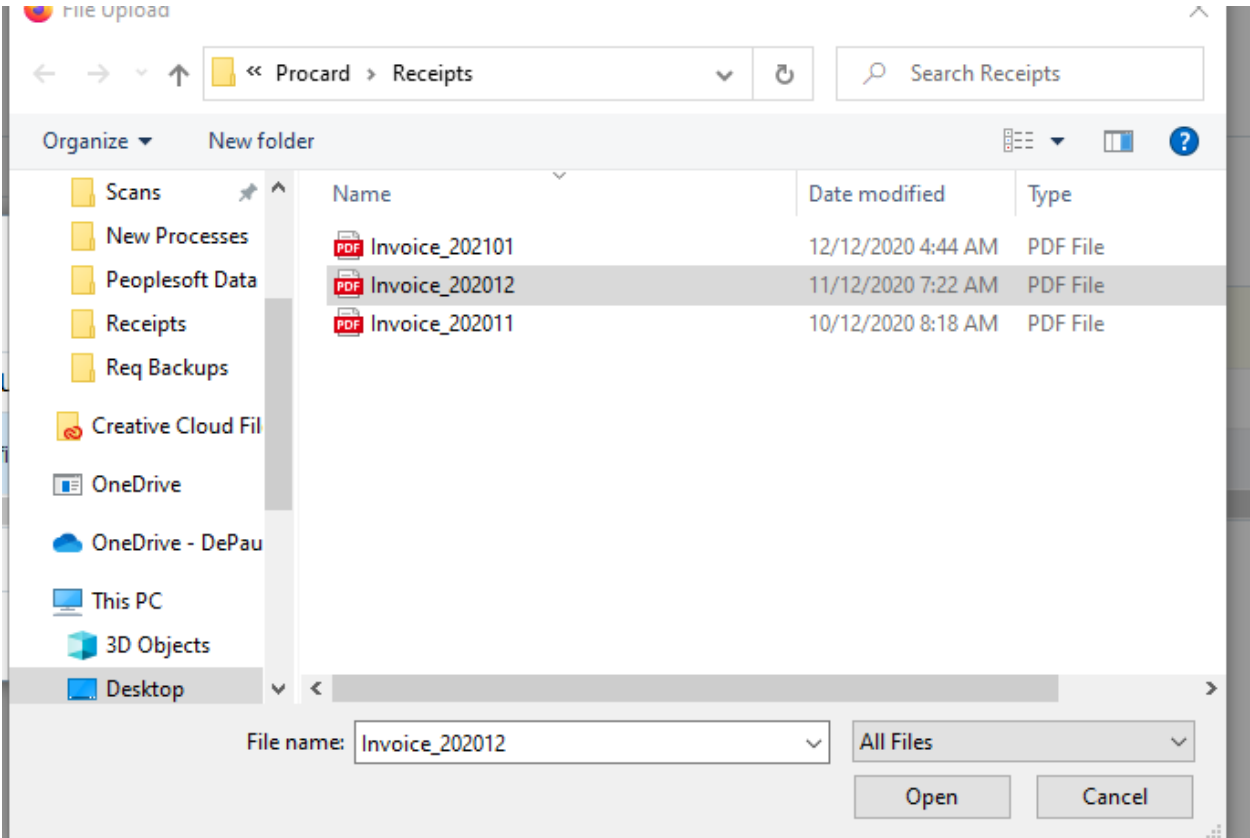
OK Cancel

You will need to attach for both the approver and supplier. Under Category you will be able to pick who should see the attachments.

Actions ▾ View ▾ + X

Type	Category	* File Name or URL
File ▾	To Approver ▾	Browse... No file selected.

Click Browse.



Click the file and click Open.

View ▾ + X

Click the + button.

**Attachments** X

Actions ▾ View ▾ + X

Type	Category	* File Name or URL	Title	Description	Attached By
File ▾	To Supplier ▾	Invoice_202012.pdf <a href="#">Update...</a>	Invoice_202012.pdf		Laura Krauel
File ▾	To Approver ▾	Invoice_202012.pdf <a href="#">Update...</a>	Invoice_202012.pdf		Laura Krauel

Rows Selected 1

[OK](#) [Cancel](#)

Because the orders are being email out we need to attach the file twice. Please don't include any bid forms to the supplier's attachments. When done, click OK. See above.

You are now ready to perform a budget check and submit the req... Before the requisition can be submitted, it must pass a budget check. Once chartfield information has been entered for each line, click here to budget check the requisition or save the requisition so you can check budget and submit at another time.

[Shop](#)
[Check Funds](#)
[Manage Approvals](#)
[View PDF](#)
[Save](#) ▾
 [Submit](#)



Requisition Amount 5,000.00 USD  
Approval Amount [Calculate Amount with Tax](#)  
**Funds Status** Not reserved  
**Attachments** None +

umber required

n: REQ0000100826 Shop Check Funds Manage Approvals View PDF Save ▾ Submit

Last Saved 12/28/2020 8:06 PM

ePaul University

DW - Test Order

Justification

Emergency purchase order number required

**Requisition Amount** 5,000.00 USD  
**Approval Amount** [Calculate Amount with Tax](#)  
**Funds Status** Passed  
**Attachments** None +

**Confirmation** X

The transaction passed the funds check process.

[View Funds Check Results](#) [OK](#)

**Click the Ok button in the Confirmation page.**

[Shop](#) | 
 [Check Funds](#) | 
 [Manage Approvals](#) | 
 [View PDF](#) | 
 [Save](#) ▼ | 
 [Submit](#)

Last Saved 12/28/2020 8:06 PM



Number required

**Requisition Amount** 5,000.00 USD

**Approval Amount** 5,000.00 USD

**Funds Status** Passed

**Attachments** None +

**Click the submit button.**

Valid indicates that the requisition has passed the budget check. You can now submit your order for review/approval. If the order doesn't pass budget checking please email [procurement@depaul.edu](mailto:procurement@depaul.edu) with the requisition number.

**Save for Later** – If you click on Save and close, the requisition will save in Open status. So you can work on it later.

[Shop](#) | 
 [Check Funds](#) | 
 [Manage Approvals](#) | 
 [View PDF](#) | 
 [Save](#) ▼ | 
 [Submit](#)

Last Saved 12/28/2020 8:06 PM

**Save and Close**

**Recent Requisitions** [View More](#)

REQ0000100826	CDW - Test Order	Pending approval
REQ0000100825	CDW order	Pending approval
REQ0000100816	Testing for Comments at all level of approval	Approved

**Confirmation** ✕

Requisition REQ0000100826 was submitted.

If you need a copy of the requisition click the View PDF. If not click the OK button.

**Recent Requisitions – Quick view of your orders.**

Recent Requisitions		<a href="#">View More</a>
<a href="#">REQ0000100826</a>	CDW - Test Order	<a href="#">Pending approval</a>
<a href="#">REQ0000100825</a>	CDW order	<a href="#">Pending approval</a>
<a href="#">REQ0000100816</a>	Testing for Comments at all level of approval	<span>✓</span> <a href="#">Approved</a>
<a href="#">REQ0000100811</a>	Test 2	<span>✗</span> <a href="#">Rejected</a>
<a href="#">REQ0000100797</a>	SAMPLE TEST FOR 2 WAY MATCHING ...	<a href="#">Pending approval</a>

This page confirms the requisition submission and shows Pending approval. This requisition must be first approved by a buyer... The requisition will become an active order only after all approvals have been processed.

