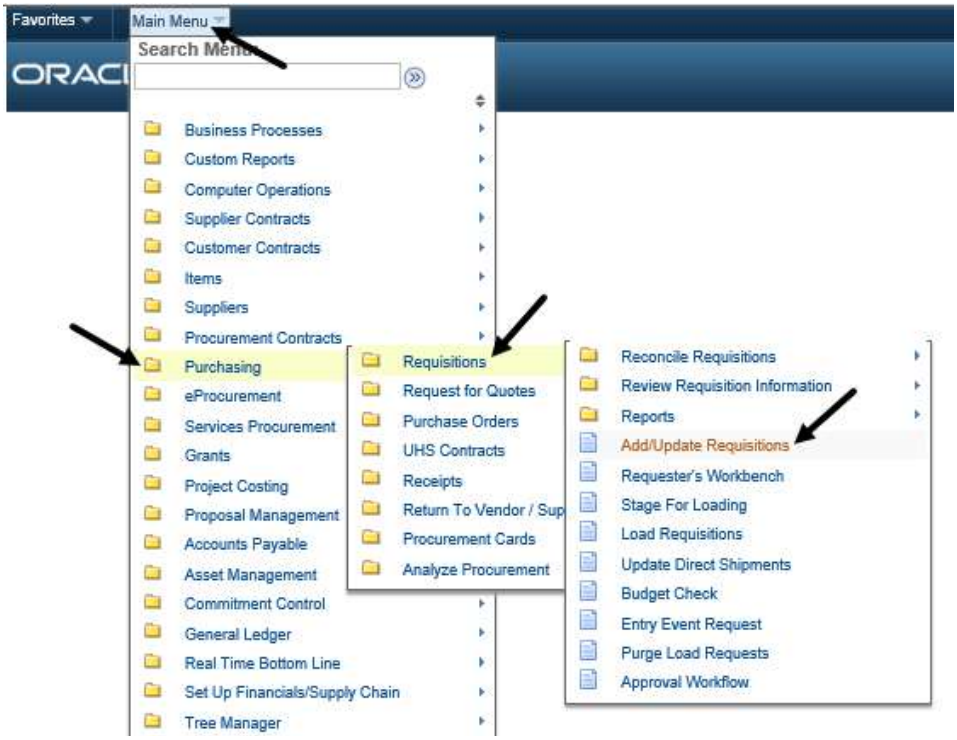
Requisition Entry in UHS Finance

Please have the following information before beginning:

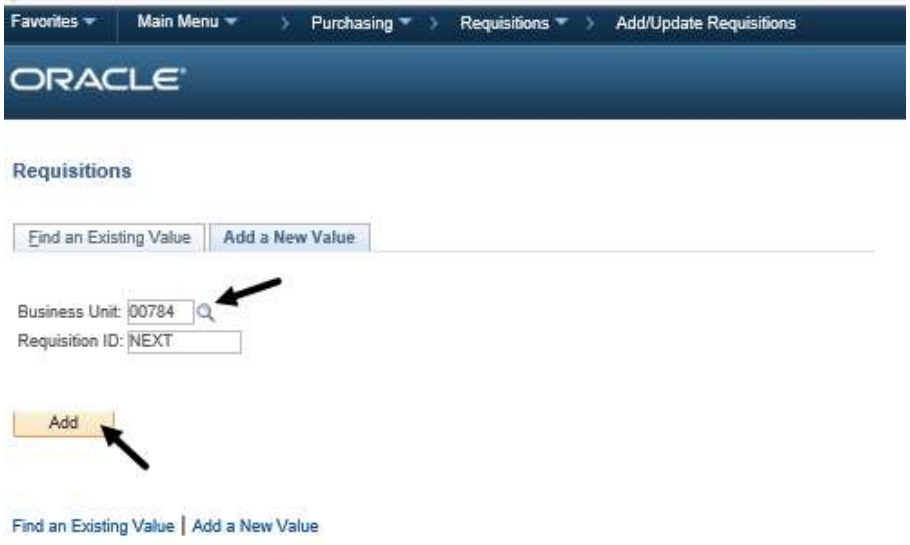
- Valid Quote
- Supplier ID number *(ensure the correct supplier address is available)*
- Account and Cost Center information. (Fund, Department, Program, Budget Ref., and Project)

1. Log into UHS Finance then follow the path**:**

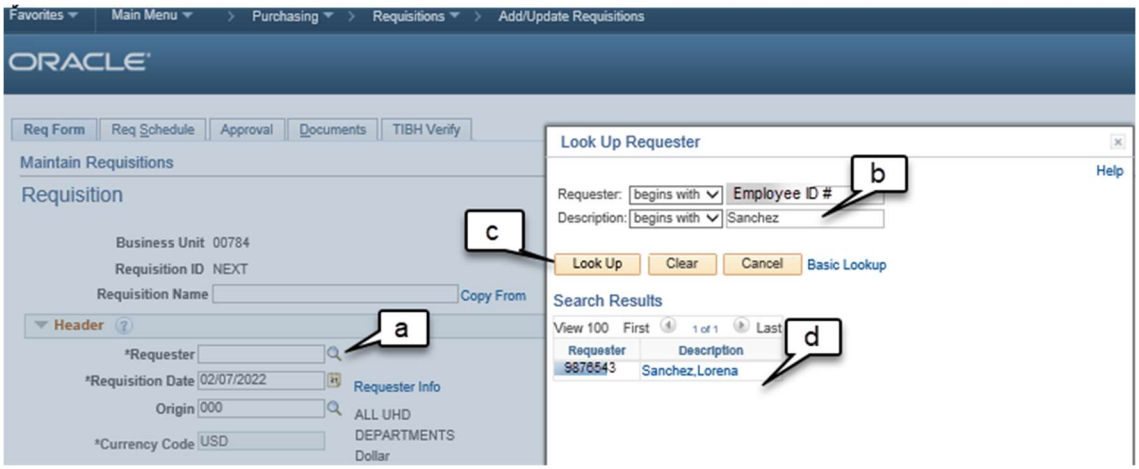
Main Menu → Purchasing → Requisitions → Add/Update Requisitions



2. Click the search symbol to select the appropriate Business Unit: **CN784** for UHD and UHS contracts, or **00784** for Cooperative Contracts and non-contract requisitions, then click **Add**

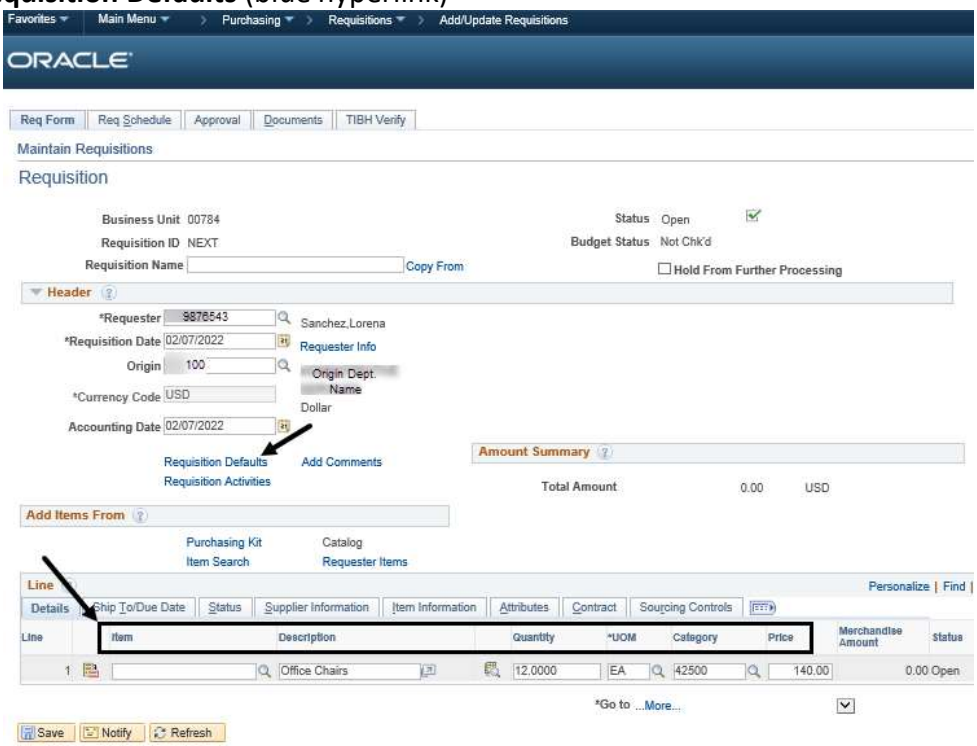


3. Enter the Requester:
   a) Click the **search symbol** to search for Requester.
   b) You may search two ways. First by keying in employee ID number under **Requester** or by keying inthe last name under **Description** *(ensure the correct name is entered)*
   c) Click **Look up**
   d) Select the appropriate name



4. Key in the following information under line one:
   - **Description** of the item/service
   - **Quantity**, either tab over or click on “quantity”
   - **Unit of Measure** (UOM), click on the search symbol and choose the appropriate unit of measure.
   - **Category**, click on the search symbol, key in the description of the item being purchased and choose the appropriate category.

5. Next click on **Requisition Defaults** (blue hyperlink)



6. Requisition Defaults Page:

a) Choose the correct buyer; either enter the last name or click on the spyglass to search the buyer's information.

Buyer based on the dollar amount:

i. Below - $24,999 = Michael Vernon

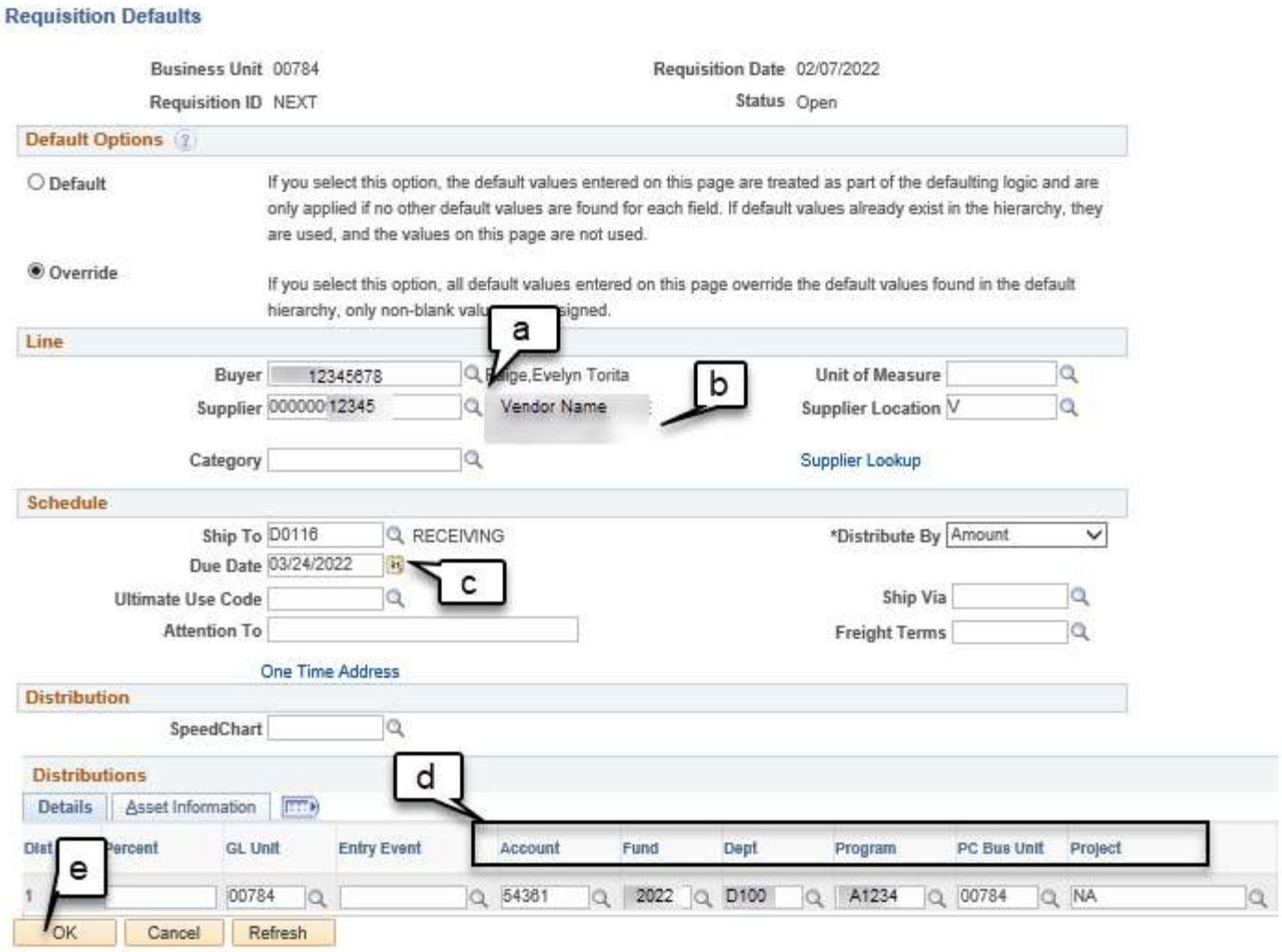
ii. $25,000 and above = Evelyn Paige

b) Select the correct supplier, either enter the supplier's name or click on the spyglass. *(Please ensure the correct supplier is selected).*

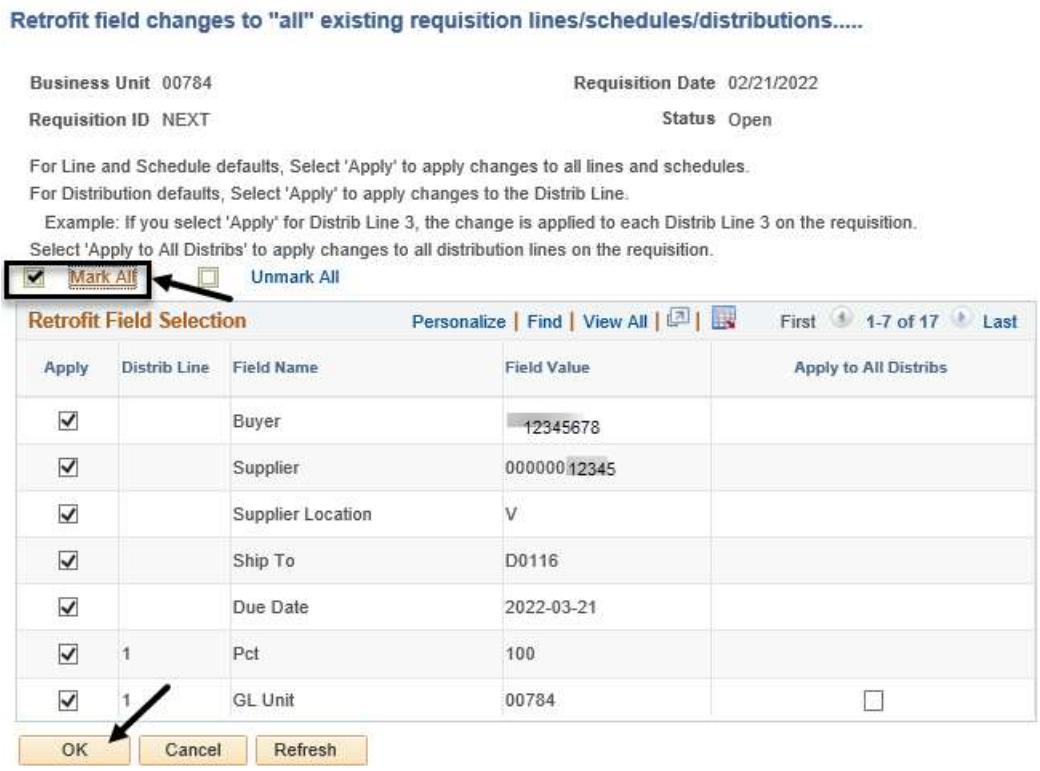
c) Select Due Date of Items to be delivered or services to be provided

d) Key in **Account** and **Cost Center Information** under line one. (If more than one account and/or cost center, please contact the Purchasing Dept.)

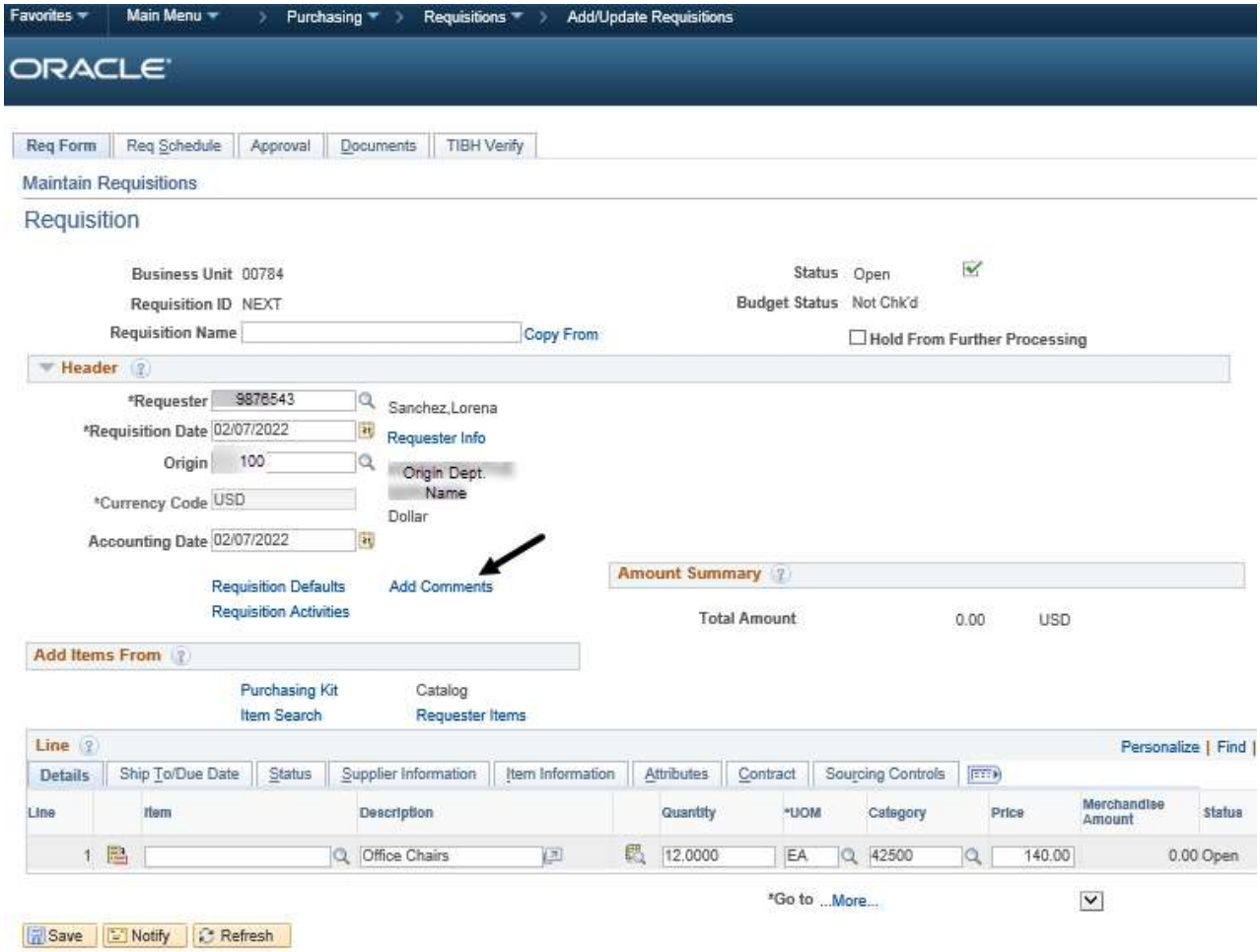
Click **OK.**



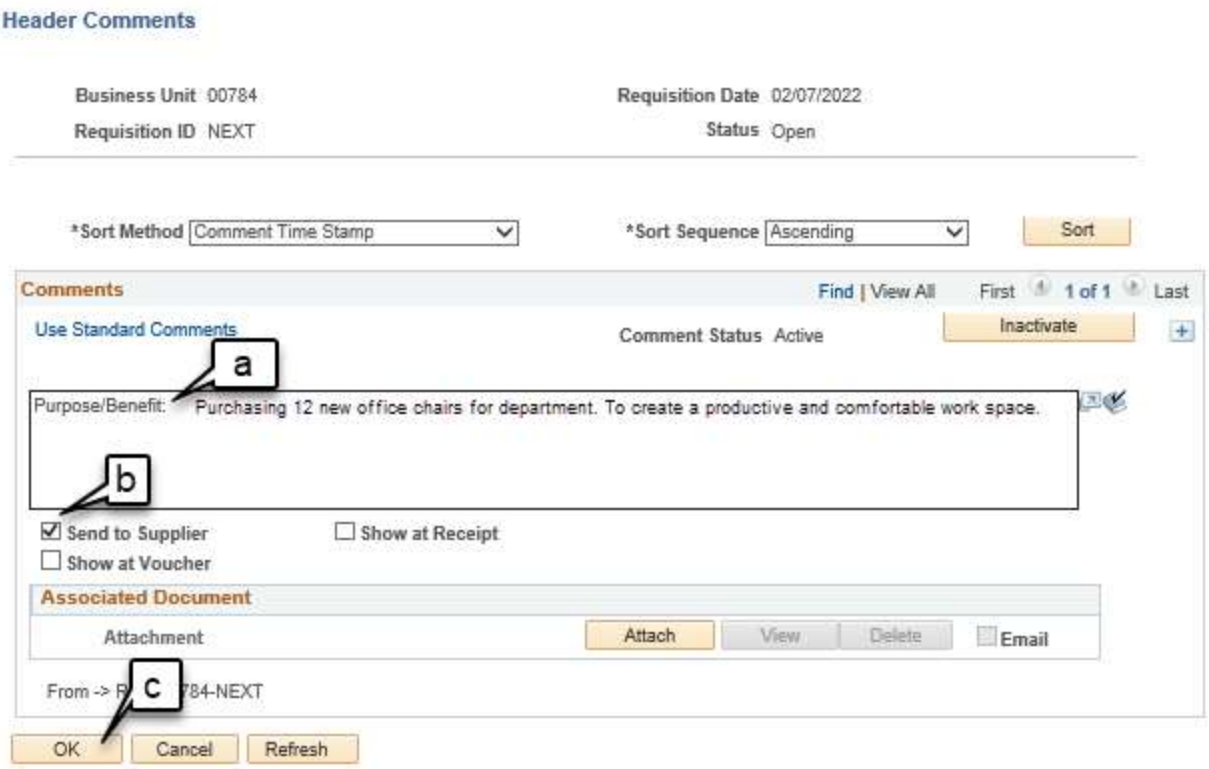
7. Select **Mark All** (make sure all boxes are checked) and click **OK** (this will navigate back to form tab)



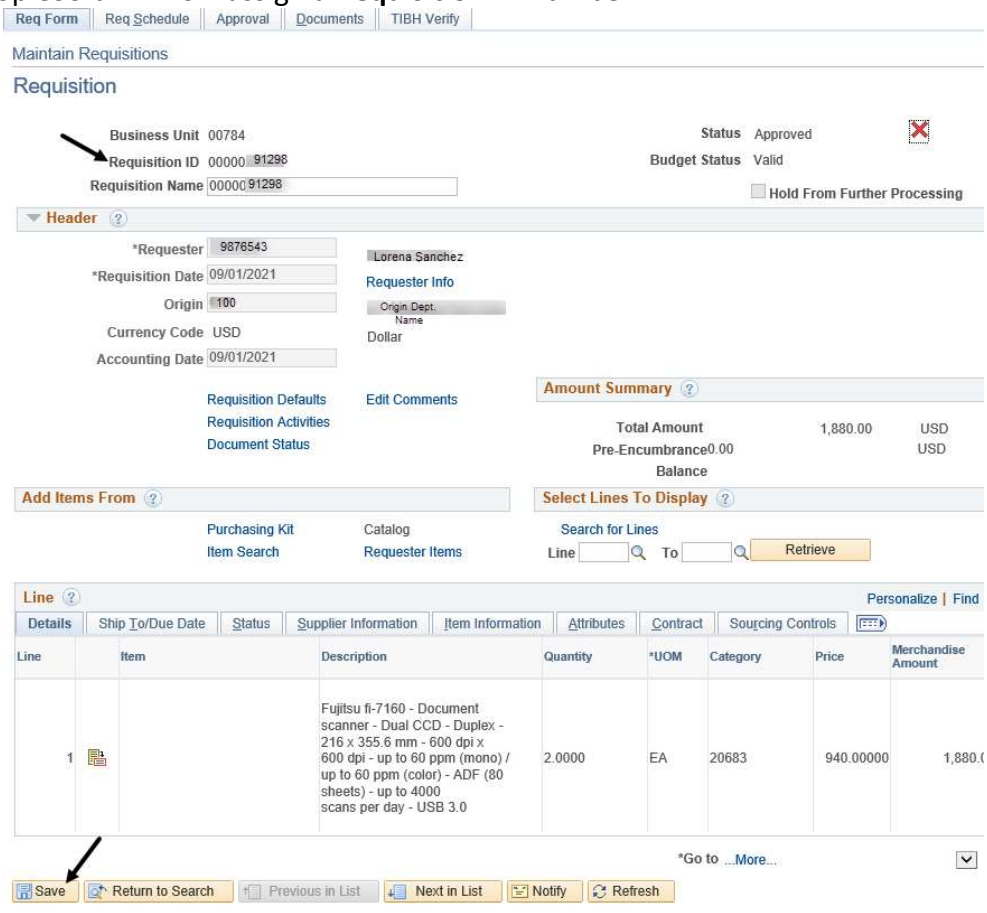
8. Click **Add Comments** (blue hyperlink)



9. Key in the following information:
   a) Purpose/Benefit statement
   b) Select the **Send to Supplier** box
   c) Click **OK** (*this will navigate back to the form tab*)

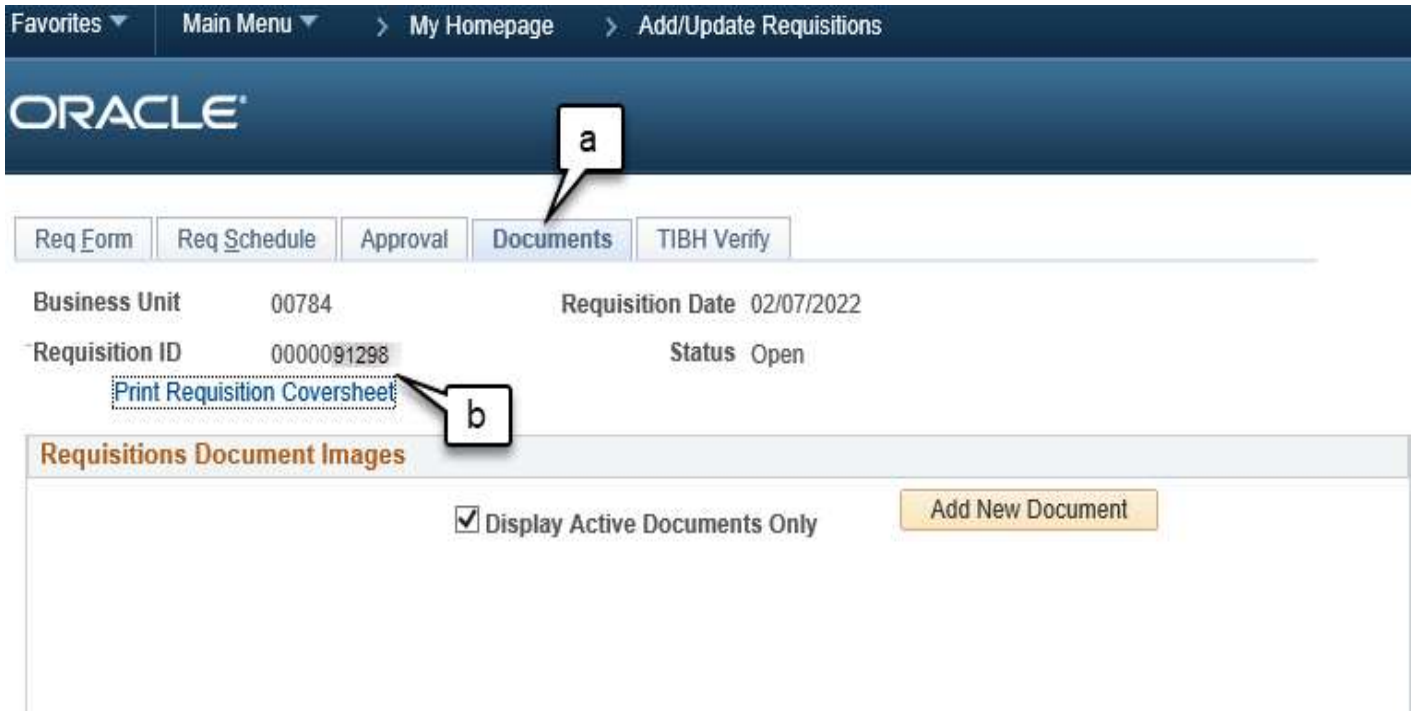


10. Click **Save.** PeopleSoft will now assign a **Requisition ID** number



11. Ensure the requisition has all the necessary information by viewing the Requisition Coversheet

a) Click on the **Documents tab**
b) Click **Print Requisition Coversheet** (review the information entered)

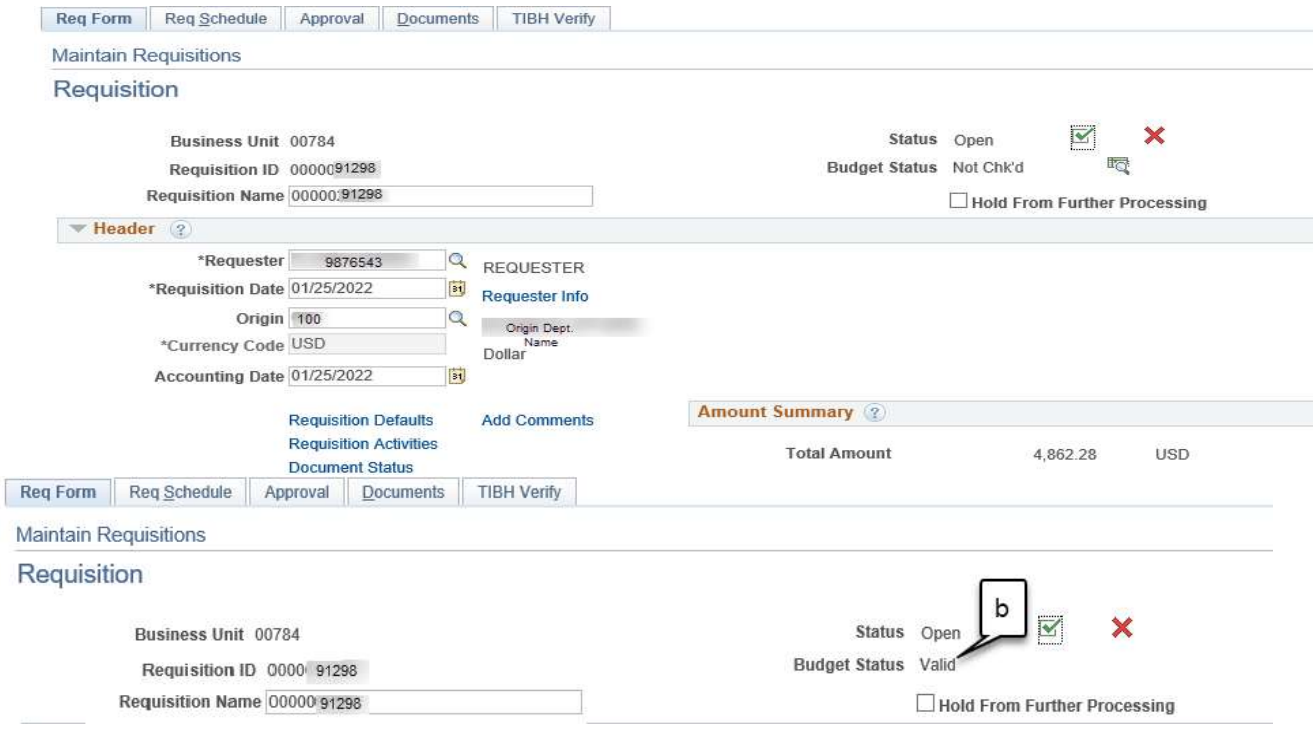


c) The requisition **should** contain the following information:
   - Department name
   - Requestor information
   - Supplier ID
   - Supplier name
   - Amount of your requisition
   - Account
   - Cost center information
   - Description
   - Purpose and benefit statement

12. If requisition information is correct, proceed to Budget check the requisition by returning to the Form tab.

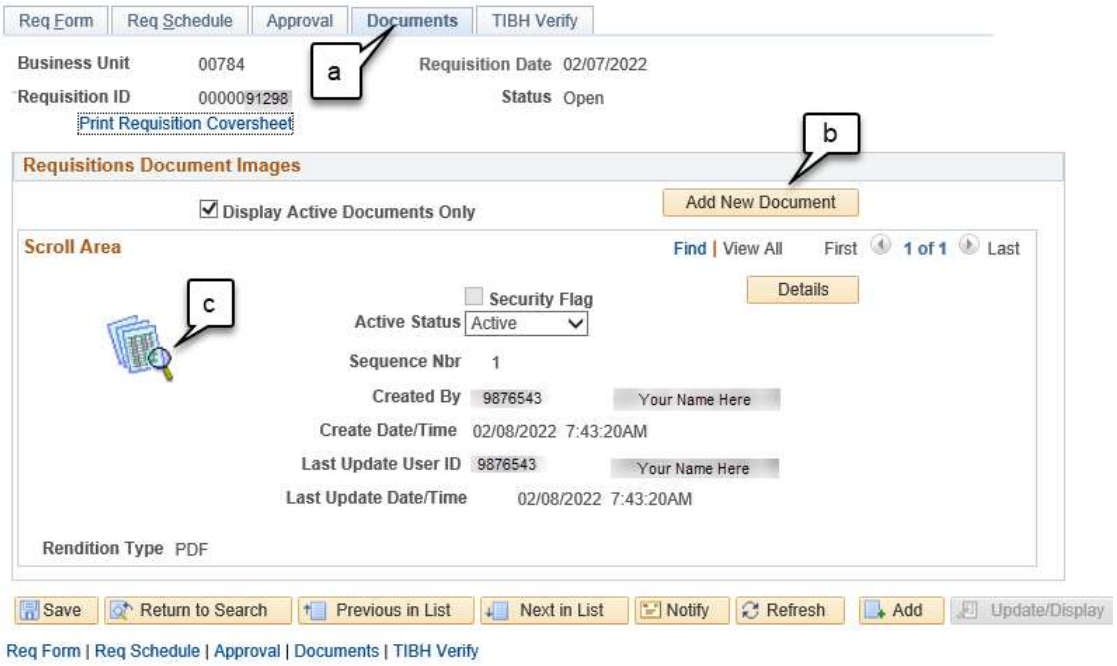
a) Click the budget check icon. (Valid budget check is required to continue).

b) Make sure Budget Status is Valid. If a budget error is received, please contact the Budget office for assistance.

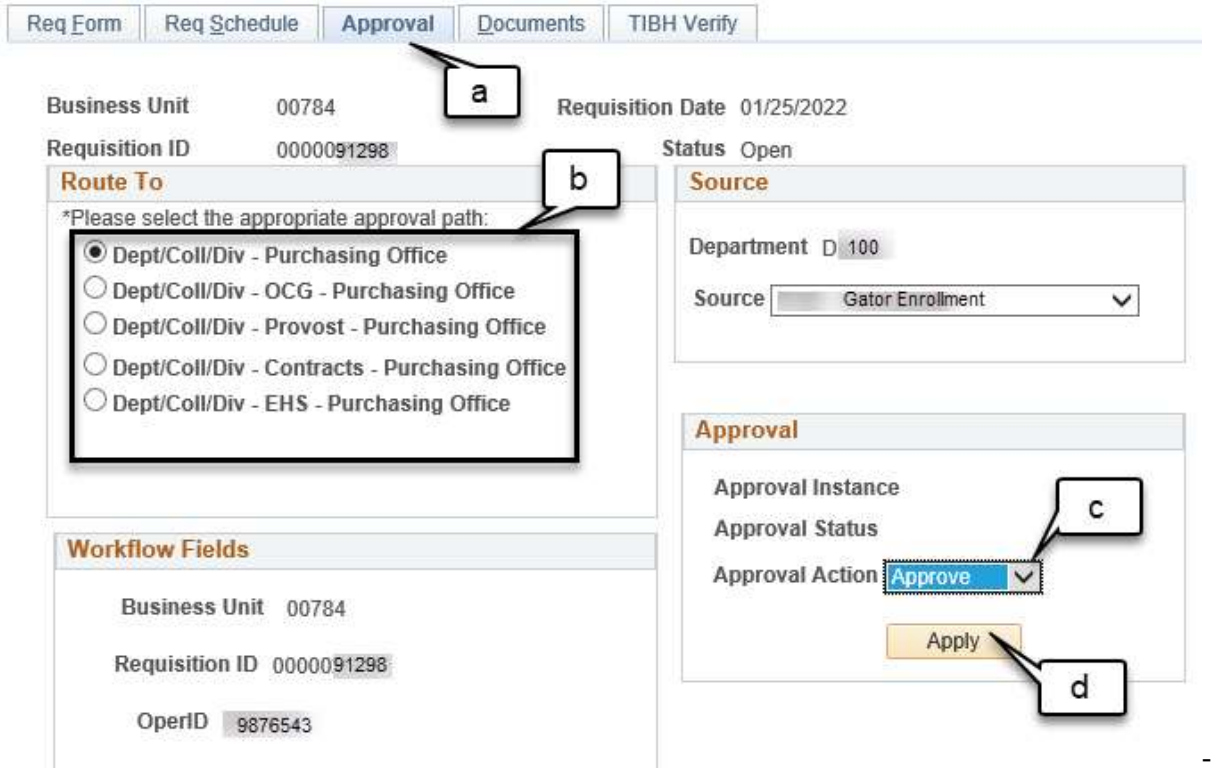


13. Next upload all necessary information:

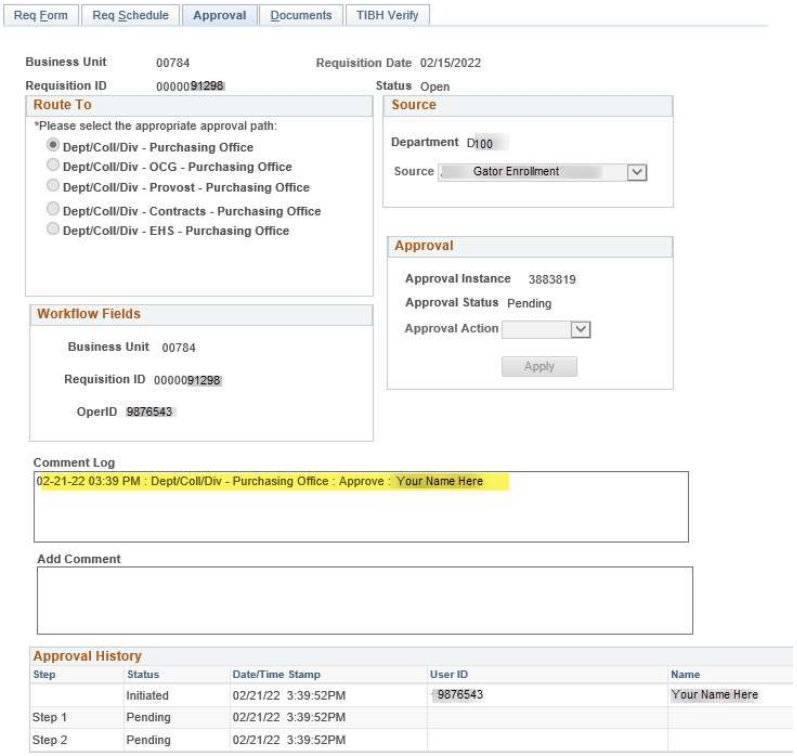
a) Click on the **Documents tab**
b) Click **Add New Document,** browse and select the file.
c) The **file icon** should be visible (ensure the correct file was uploaded)



14. Send the requisition through workflow:
    a) Click the **Approval** tab
    b) Choose the appropriate path *(source will be selected)*
    c) Click **Approve**
    d) Click **Apply**



    e) Once you Submitted for Approval, you completed the Requisition as seen below.



NOTE: Purchasing has a 48-hour turnaround time to process the requisition.

For questions or assistance, please contact the Purchasing Department.