**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
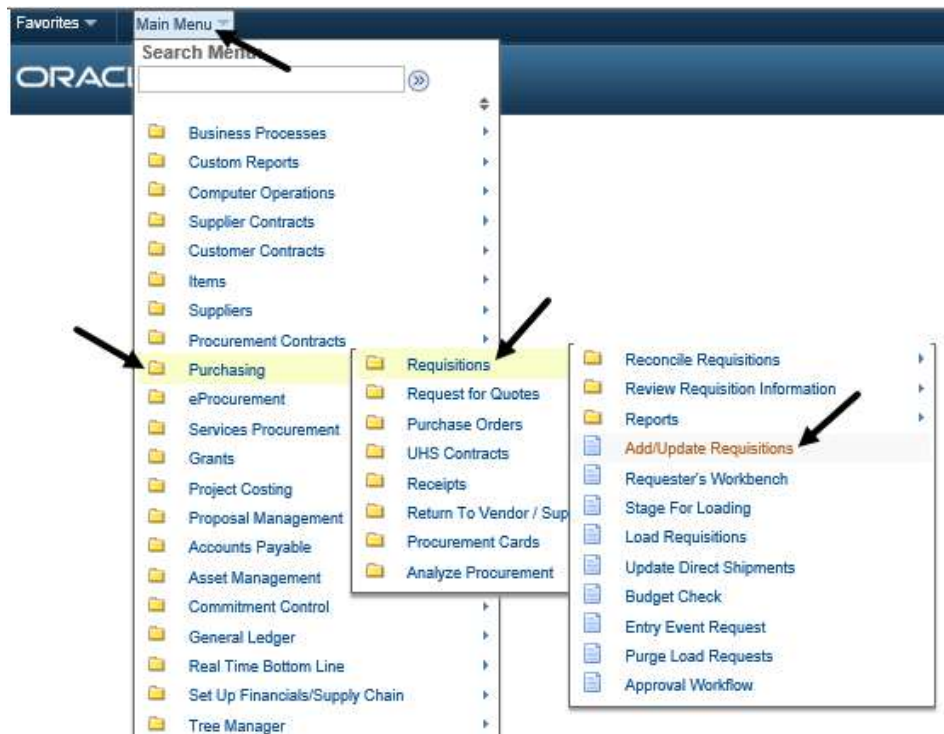

2. Click the search symbol to select the appropriate Business Unit: **CN784** for UHD and UHS contracts, or **00784** for Cooperative Contracts and non-contract requisitions, then click **Add**

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
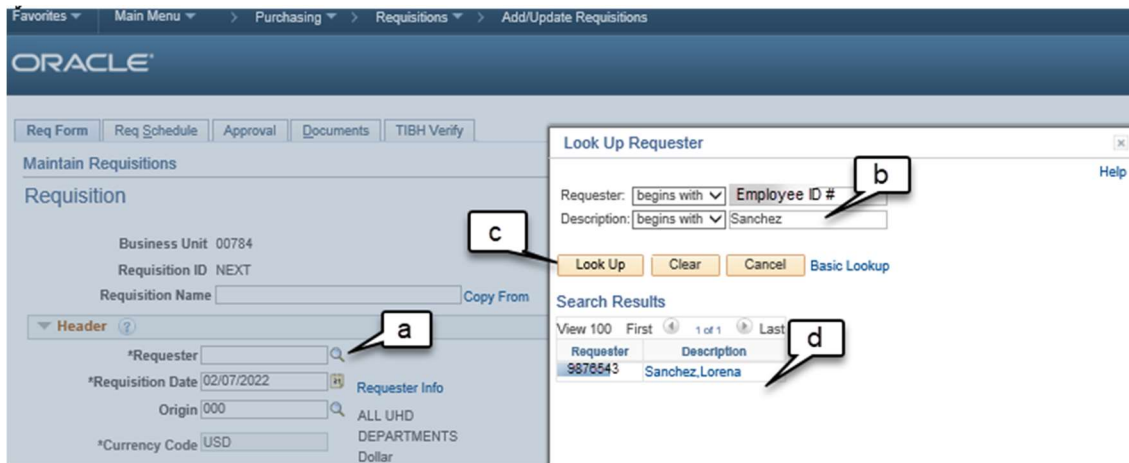
4. Key in the following information under line one:

   - **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)
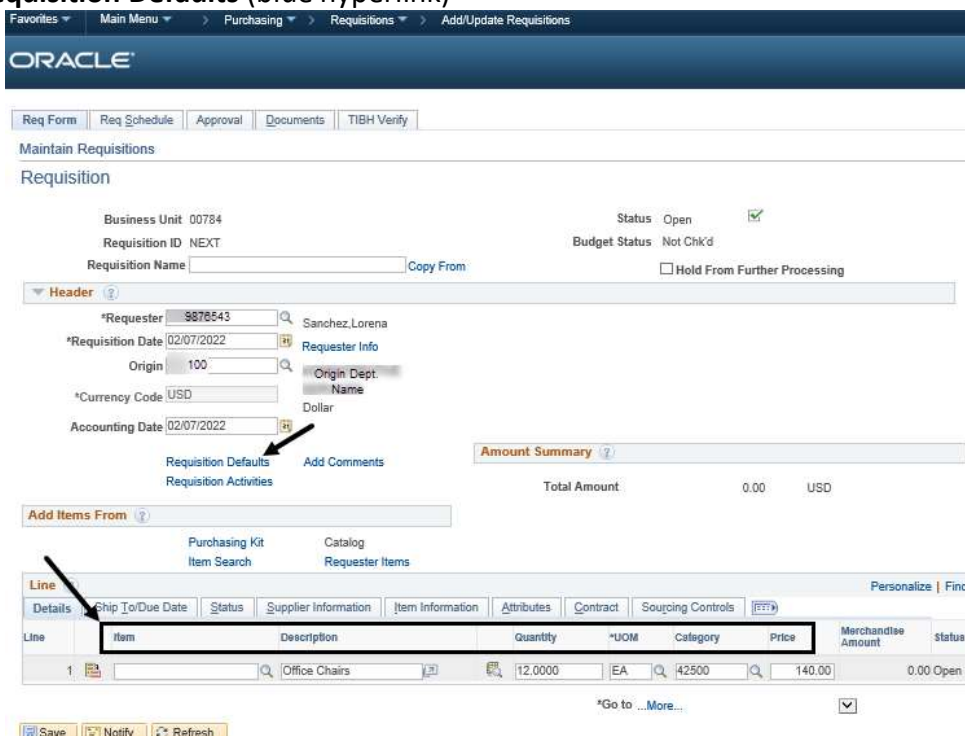
6. Requisition Defaults Page:

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.**

Requisition Defaults

Business Unit 00784	Requisition Date 02/07/2022
Requisition ID NEXT	Status Open

Default Options (?)

○ Default — If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

⦿ Override — If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank valu[a]signed.

Line

Buyer	12345678	Q Paige,Evelyn Torita	[b]	Unit of Measure
Supplier	000000 12345	Q Vendor Name		Supplier Location V
Category		Q		Supplier Lookup

Schedule

Ship To D0116	Q RECEIVING	*Distribute By Amount
Due Date 03/24/2022	[c]	
Ultimate Use Code	Q	Ship Via
Attention To		Freight Terms

One Time Address

Distribution

SpeedChart [ ] Q

Distributions [d]

Details | Asset Information | [...]

Dist	Percent [e]	GL Unit	Entry Event	Account	Fund	Dept	Program	PC Bus Unit	Project
1		00784 Q		Q 54361	Q 2022	Q D100	Q A1234	Q 00784	Q NA

OK | Cancel | Refresh

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*)

Header Comments

Business Unit 00784
Requisition ID NEXT

Requisition Date 02/07/2022
Status Open

*Sort Method [Comment Time Stamp ▼]   *Sort Sequence [Ascending ▼]   [Sort]

Comments   Find | View All   First ◀ 1 of 1 ▶ Last

Use Standard Comments   Comment Status Active   [Inactivate]   [+]

a

Purpose/Benefit: Purchasing 12 new office chairs for department. To create a productive and comfortable work space.

b

☑ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document

Attachment   [Attach]   [View]   [Delete]   ☐ Email

From -> R **c** 784-NEXT

[OK]   [Cancel]   [Refresh]

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

| Req Form | Req Schedule | Approval | Documents | TIBH Verify |

Maintain Requisitions

Requisition

Business Unit 00784
Requisition ID 00000 91298
Requisition Name 00000 91298

Status Approved   ✕
Budget Status Valid
☐ Hold From Further Processing

▼ Header ?

*Requester 9876543   Lorena Sanchez
*Requisition Date 09/01/2021   Requester Info
Origin 100   Origin Dept.
                            Name
Currency Code USD   Dollar
Accounting Date 09/01/2021

Requisition Defaults   Edit Comments
Requisition Activities
Document Status

Amount Summary ?

Total Amount   1,880.00   USD
Pre-Encumbrance 0.00   USD
Balance

Add Items From ?

Purchasing Kit   Catalog
Item Search   Requester Items

Select Lines To Display ?

Search for Lines
Line [ ] 🔍 To [ ] 🔍 [Retrieve]

Line ?   Personalize | Find

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls |

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount
1	📄	Fujitsu fi-7160 - Document scanner - Dual CCD - Duplex - 216 x 355.6 mm - 600 dpi x 600 dpi - up to 60 ppm (mono) / up to 60 ppm (color) - ADF (80 sheets) - up to 4000 scans per day - USB 3.0	2.0000	EA	20683	940.00000	1,880.0

*Go to ...More...   [▼]

[Save]   [Return to Search]   [Previous in List]   [Next in List]   [Notify]   [Refresh]

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.