Requisition Entry in UHS Finance

Please have the following information before beginning:

1. Quote
2. Vendor ID number (ensure the correct vendor address is selected)
3. Account and the cost center information.

Log into UHS Finance then follow the path:
Main Menu ➔ Purchasing ➔ Requisitions ➔ Add/Update Requisitions

Next click Add
Enter the Requester:

1. Click the **spy glass**.
2. You may search two ways. First by keying in employee ID number under **Requester** or by keying in the last name under **Description** (please double check to ensure the correct name is entered).
3. Click **Look up**
4. Select the appropriate name

1. 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 spy glass and choose the appropriate unit of measure.
   - **Category**, click on the spy glass, key in the description of the item being purchased and choose the appropriate category.

2. Next click on **Requisition Defaults** (blue hyperlink)
Requisition Defaults Page:

1. 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:**
   - $10,000 and below = Rachel Jones
   - $10,001 - $24,999 = Lorena Sanchez
   - $25,000 and above = Cory Odstrcil

2. Select the correct vendor, either enter the vendor’s name or click on the spyglass. *(Please ensure the correct vendor is selected).*

3. Key in **Account** and **Cost Center Information** under line one.

4. Click **OK**.
1. Select **Mark all**
2. Next click **OK** *(this will navigate back to form tab)*

1. Click **Add Comments** *(blue hyperlink)*
Key in the following information:

1. Purpose/Benefit.
2. Select the Send to Vendor box
3. Click OK (this will navigate back to the form tab)

1. Click Save
2. PeopleSoft will now assign a Requisition ID number
Ensure the requisition has all the necessary information by viewing the Requisition Coversheet

1. Click on the Documents tab
2. Click **Print Requisition Coversheet**.

The requisition **should** contain the following information:

- Department name
- Requestor information
- Vendor ID
- Vendor name
- Amount of your requisition
- Account
- Cost center information
- Description
- Purpose and benefit
If requisition information is correct, precede to Budget check the requisition by returning to the Form tab.

1. Click the **budget check icon**. *(Valid budget check is required to continue)*. If a budget error is received, please contact the **Budget office** for assistance.

### Requisition

| **Business Unit:** | 00784 |
| **Requisition ID:** | **NEXT** |
| **Requisition Name:** | Copy From |

**Status:** Open
- **Budget Status:** Not Chkd

**Origin:** ADMINISTRATIVE SERVICES
- **Currency Code:** USD
- **Accounting Date:** 07/31/2014

**Add Items From**
- **Purchasing Kit**
- **Catalog**
- **Item Search**
- **Requester Items**

**Requisition Defaults**
- **Requester Info**
- **Requisition Activities**
- **Amount Summary**

**Total Amount:** 40.00 USD

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Next upload all necessary information:

1. Click on the **Documents**
2. Click **Add New Document**, browse and select the file.
3. The **file icon** should be visible. Open the file to check the correct information is attached.

Scc
Send the requisition through workflow:

1. Click the Approval tab
2. Choose the appropriate path (*source will be selected*)
3. Click Approve
4. Click Apply

For questions or comments, please contact the Purchasing Department. Thank you.