



PeopleSoft v9.2

How to create a requisition

UH Purchasing Department

How to create a requisition

Step 1: Go to Purchasing>Requisitions>Add/Update Requisitions

Step 2: You are on the Requisition Form page. Select **Business Unit**, then click on the Add button.

The screenshot shows the 'Requisitions' form with the following elements:

- Business Unit:** 00730 (with a magnifying glass icon and a red arrow pointing to it)
- Requisition ID:** NEXT
- Add button:** A button labeled 'Add' with a red arrow pointing to it.
- Search Results:** A table with columns 'Business Unit' and 'Description'. The results are as follows:

Business Unit	Description
00730	University of Houston
00759	Univ. of Houston - Clear Lake
00765	Univ. of Houston - Victoria
00783	Univ. of Houston-System Admin.
00784	Univ. of Houston - Downtown
CN730	Contracts - UH
CN783	Contracts - UHS
CN784	Contracts - UHD
FP730	Facilities Planning - UH
FP783	Facilities Planning - UHS

Please note:

If your requisition is FP730 or FP783, contact Facilities for instructions.

If your requisition is RC730, contact Division of Research for instructions.

Step 3: In the Header section, enter **Requester's Empl ID**. If you do not know the **Empl ID**, click on the magnifying glass icon and find the value. **Requisition Date** and **Accounting Date** will default to today's date.

Note: At the fiscal year end, if you are creating a requisition for the new fiscal year based on the approved annual schedule per the Key Dates Calendar (<https://www.uh.edu/office-of-finance/calendar-schedule>), you will need to change the accounting date to 09/01/xx (new fiscal year)

The screenshot shows the 'Maintain Requisitions' interface. At the top, there are tabs for 'Form', 'Schedule', 'Approval', 'Documents', and 'TIBH Verify'. Below the tabs is the title 'Maintain Requisitions' and 'Requisition'. The 'Header' section contains the following fields:

- *Requester: [Empty field] [Magnifying glass icon]
- *Requisition Date: 06/13/2019 [Calendar icon] Requester Info
- Origin: 000 [Magnifying glass icon] ALL UH DEPARTMENTS
- *Currency Code: USD Dollar
- Accounting Date: 06/13/2019 [Calendar icon]

On the right side, there are links for 'Requisition Defaults', 'Add Comments', and 'Requisition Activities'. Below these is the 'Amount Summary' section, which displays 'Total Amount: 0.00 USD'.

At the bottom, there is an 'Add Items From' section with two options: 'Purchasing Kit' and 'Item Search', and 'Catalog' and 'Requester Items'.

Step 4: In the Header section, click on “requisition Defaults”.

[Requisition Defaults](#) ←

[Add Comments](#)

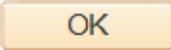
[Requisition Activities](#)

Amount Summary

Total Amount:

0.00 USD

Step 5: The system will display the Requisition Defaults page.

- Make sure “Override” is selected in the Default Options section.
- In the line section, enter the **Buyer** name. Your department is assigned to a particular buyer. Go to the Purchasing website (<http://www.uh.edu/office-of-finance/purchasing/faculty-staff-resources/buyer-designations>) to find out the buyer assigned to you.
 - For RC730/783 select DOR buyers, contact DOR.
 - For FP730/783 select Facilities buyers, contact Facilities.
- In the line section, enter the **Supplier ID** and verify Supplier location (payable address).
- In the schedule section, enter the **due date**, and make sure “Amount” is shown in the Distribute By field. The due date should be prior to the quote expiration date.
- Click on .

Requisition Defaults

Business Unit: 00730 Requisition Date: 06/13/2019
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 values are assigned.

Line

Buyer:  CARPENTER,ANTHONY CARPENTER,ANTHONY B. Unit of Measure:

Supplier:  0000009918 HIED INC Supplier Location:

Category: Supplier Lookup

Schedule

Ship To:

Due Date:  06/20/2019

Ultimate Use Code:

Attention To:

*Distribute By:  Amount

One Time Address

Step 6: You are back to the Requisition Form page. In the line section, enter the following:

- **Description** (up to 254 characters).
- **Quantity** of your order.
- **UOM** - click on the magnifying glass icon, and select applicable measure.
- **Category** – click on the magnifying glass icon, and select applicable category.
- **Price**.

Line										
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status		
1	<input type="text"/>	<input type="text" value="TEST"/>	<input type="text" value="30.0000"/>	<input type="text" value="BOX"/>	<input type="text" value="61500"/>	<input type="text" value="150.00000"/>	4,500.00	Open		

Step 7:

In the Line section of the Requisition Form page, click on .

- Enter **comments** including purpose/benefit and other information that Purchasing may need in order to process your order (e.g., UH contact name and phone number, etc.).
- Check mark **"Send to Supplier"**.
- Click on .

Line Comments

Business Unit: 00730 Requisition Date: 06/13/2019
Requisition ID: 0000045736 Status: Open Line: 1

*Sort Method: *Sort Sequence:

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status: Active

Use Item Specifications

Send to Supplier Show at Receipt
 Show at Voucher

Step 8: You are back to the Form page. If you are using multiple cost centers, click on  in the Line section to create additional lines. For example, you have one state cost center and two local cost centers to pay for the requisition, you would create three lines here.

Step 9: Go to the Requisition Schedule Page, enter the following:

Form **Schedule** Approval Documents TIBH Verify

Maintain Requisitions

Schedule

- “Ship To” location. You can click on the magnifying glass icon and select the value.

Sched	*Ship To	Quantity	Price	Merchandise Amount	*Due Date	Attention To	Status
1	H0904	3.0000	15,000.00000	45,000.00	06/20/2019	Bevco, School	Active

- Click on . The system will display the Distribution page. Enter **account** and **cost center**. You may use speedtype and may enter multiple lines. Note: This is a distribution line level. Do not enter local and state cost centers at this level. If you are using both state and local cost center, you would need to create separate lines (not distribution lines). Go back to Step 8.

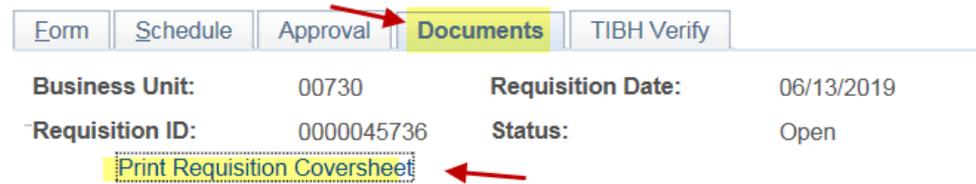
Distrib	Status	Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Dept	Program	PC Bus Unit	Project	Bud Ref
1	Open	100.0000	45,000.00	00730		53900	4041	H0081	D0607	00730	NA	BP2019

- Go to the details tab, and enter **location**, and click on .

Distrib	Status	Percent	*Location	IN Unit	Statistics Code	Open Amount	GL Base Amount	Base Currency
1	Open	100.0000	H0904			45,000.00	45,000.00	Dollar

OK Cancel Refresh

Step 10: Go to the Requisition Documents page. Click on “Print Requisition Coversheet” and review the information on the page.



The screenshot shows a navigation bar with five tabs: 'Form', 'Schedule', 'Approval', 'Documents', and 'TIBH Verify'. The 'Documents' tab is highlighted in yellow and has a red arrow pointing to it from above. Below the navigation bar, there are two rows of information. The first row contains 'Business Unit: 00730' and 'Requisition Date: 06/13/2019'. The second row contains 'Requisition ID: 0000045736' and 'Status: Open'. Below the 'Requisition ID' field, there is a button labeled 'Print Requisition Coversheet' which is highlighted in yellow and has a red arrow pointing to it from the right.

Form	Schedule	Approval	Documents	TIBH Verify
Business Unit:	00730	Requisition Date:	06/13/2019	
Requisition ID:	0000045736	Status:	Open	
Print Requisition Coversheet				

Step11: In the requisition Documents page, click on “Add New Document” to upload the required documents.

Step 12: If your requisition is CN730 or CN783, you will need to complete the Contract page. See "UHS Contracts Page Instructions for Revenue & Expense Contracts" (<http://www.uh.edu/office-of-finance/purchasing/Purchasing%20Training>) for the instruction.

If your requisition is not for CN730 or CN783, go to Step 13.

Step 13: Go back to the Requisition Form page, and budget check the requisition.

Form | Schedule | Approval | Documents | TIBH Verify

Maintain Requisitions

Requisition

Business Unit:	00730	Status:	Open	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Requisition ID:	0000045736	Budget Status:	Not Chk'd	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition Name:	<input type="text" value="0000045736"/>	<input type="checkbox"/> Hold From Further Processing			

Make sure that the requisition has a valid budget check status.

Status: Open

Budget Status: Valid

Step 14: Go to the Requisition Approval page.

If federal funds are used within 100 days of the expiration date, route the requisition through OCG. Otherwise, route the requisition directly to Purchasing.

Then, select “Approve” and click on the apply button.

Form | Schedule | **Approval** | Documents | TIBH Verify

Business Unit: 00730 Requisition Date: 06/13/2019
Requisition ID: 0000045736 Status: Open

Route To
*Please select the appropriate approval path:
 Dept/Coll/Div - Purchasing Office
 Dept/Coll/Div - OCG - Purchasing Office

Source
Department H0160
Source AAP - Accounts Payable

Workflow Fields
Business Unit 00730
Requisition ID 0000045736
OperID 0127173

Approval
Approval Instance
Approval Status
Approval Action: Approve
Apply

Comment Log

**For additional training/resources and to find your assigned buyer
please view the link below.**

<https://www.uh.edu/office-of-finance/purchasing/faculty-staff-resources/>