Create and Edit a Purchase Requisition

Created by the Teaching and Learning Center for Procurement Services

If you have questions, please contact purchasing@fsw.edu.
Create and Edit a Purchase Requisition

1. Log-in to the FSW Portal (http://my.fsw.edu).

   **WARNING:** You must use Mozilla Firefox or Google Chrome web browsers to submit and view purchase requisitions. Internet Explorer is NOT supported. If you do not have the correct browser installed on your computer, please contact helpdesk@fsw.edu.

2. Click the College Resources tab on the navigation bar.

3. Navigate to the Office of Financial Services box and click Purchase Requisition.
4. The **Purchase Requisition Dashboard** page will open in a new tab or window.

![Dashboard Image]

Go to [https://www.fsw.edu/tlc/training](https://www.fsw.edu/tlc/training) and click on ‘View the Purchase Requisition Dashboard’ to learn how the information found on your Dashboard can help you.

5. Click the **Create Requisition** button in the top right corner of the dashboard.
6. The first page is the **Requestor Information** page. The Requestor (you), Transaction Date, Chart, and Organization will be pre-populated on the page.

You will enter the following information: **Delivery Date, Ship To Location, and Attention To name.**

You also have the option to enter **Public and Private Requisition Comments.** Remember, public comments will appear on the PO and private comments will only be seen within the system. **The Public Comments will appear at the top of the Requisition.**

7. After you enter the **Requestor Information** and click **Next**, the system generates an “R” (requisition) number immediately and the requisition is saved. You will see a green confirmation box appear after this occurs. The requisitions will now appear in your **Draft Requisitions**. This is helpful if you need to step away from your desk while in the middle of entering a requisition. You can simply click on the requisition under **Draft Requisitions** on the **Dashboard** and continue.
8. Select a Vendor for the requisition. Click in search box and enter known vendor number (using @000####) or start typing the vendor name in the box.

You do not need to type the entire name because the system uses a “type ahead” search. It is not necessary to type the entire name in most cases because you can select the item from the drop down list that appears as you type.

**LEAVE BLANK Choose vendor for me – do NOT check box**

The Vendor Email will pre-populate based on the vendor selection OR you can type in the Vendor Email.

Discount and Currency will pre-populate based on the vendor selection – **DO NOT change OR populate.**

Click **Next** to continue and save the Vendor.

*For example, a search for “Enterprise” or “Enterprise %” will yield a list of many results with different addresses. The vendor numbers are the same but “the business unit address will vary.*
9. Add an item by beginning to type the name of the item in the Enter Item Description box below Add Item(s).

Provide a Unit of Measure by choosing an option from the drop-down list.

Enter the Quantity and Unit Price for the item.

The Additional Amount field can be used to include shipping charges and other additional fees. For example, someone purchasing a computer may include a service plan. The service plan is additional because the service plan is not an item in inventory.

DO NOT ENTER INFORMATION INTO THE Tax Group, Discount Amount and Tax Amount fields – Leave Blank

You also have the option to enter Public and Private Commodity Comments. Remember, public comments will appear on the PO and private comments will only be seen within the system. In this section, the Public Comment will appear immediately underneath that commodity (or line item).

Click Save to continue.
10. The page refreshes with the item you just added listed below the Add Item(s) field in the Commodities list. You can click any item in the list to view its details.

Repeat steps 9 & 10 as necessary to add additional items to the requisition. You can add an unlimited amount of additional items to the requisition. Commodities with a unit price >$999 will require an inventory account code from the 70000 pool, and must be entered on a separate requisition.

When finished adding items, click the Add Accounting button at the bottom of the screen.
11. Select the Chart number from the drop down. Enter the Index for the requisition. The Fund, Organization, and Program will populate based on this selection.

Choose an Account for the requisition by selecting the correct account code. You can start typing a description and related codes will appear in the drop-down list.

DO NOT enter information into the Activity, Location or Project fields – LEAVE BLANK
12. Click **Save**. You will now see the green Funding box below the items. Click the box to review the funding details.

If you decide to change the funding distribution, click anywhere on the funding box (shown above) and you will return to the **Add Accounting** screen.
13. Change the **Distribution Percent** for the requisition and then click the **Split Accounting** button.
14. Repeat the Add Accounting steps as necessary to balance the distribution. Each time you save, the funding details will be updated to reflect the percentages.

Note: The Submit Requisition button will not appear if the funding is not balanced.
15. Click **Next** when you have finished entering the Accounting for the requisition. You will then have the option to **View as PDF** or **Submit Requisition**. The requisition is saved as a draft automatically throughout the process.

Once submitted, the requisition will be moved to the **Pending Requisitions** area on the **Purchase Requisition Dashboard**.
Delete a Requisition

1. You can delete a requisition at any point in the process before it has been submitted. Click Delete Requisition next to the trashcan icon in the top right corner.

2. Confirm your decision to Delete Requisition by clicking Yes or No.

Please note: You cannot delete a requisition once it has been submitted. You must first recall the requisition and then delete it. Once a requisition is recalled, it will return to the list of Draft Requisitions and can be deleted.

Copy a Requisition

1. You can copy a completed requisition and use it as a template for a new requisition. Open a completed requisition to copy on the Purchase Requisition Dashboard. Remember to click View More if you cannot see all of your requisitions.

2. You will see the Requestor Information page after you click on the completed requisition. Click Copy Requisition.

3. Choose Yes to create an identical new requisition that you can edit. Choose No to cancel the copy.

4. Edit the new requisition by following the same steps listed above for creating a new requisition.

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