Completing the Purchase Requisition Form

The Purchase Requisition Form creates an electronic requisition used:

- To order items from suppliers that do not have a Hosted or Punchout catalog.
- To order items not offered in suppliers’ Hosted or Punchout catalogs.
  
  **NOTE:** If you are creating an order for items not offered in a suppliers’ Hosted or Punchout catalog, it is advised to obtain a quote from the supplier representative that details the Catalog Number, Product Description, Quantity, Packaging, and Price. This process should not be used if the supplier creates an e-quote through the catalog.

- For orders that require a contract or for the university to agree to vendor terms and conditions.

- To order goods or services that are restricted as detailed in Policy & Procedures Manual, Section 7.2 Purchase of Goods & Services, Additional Resources. Examples include but not limited to: telecommunication equipment, weapons, furniture, chartered services, lab gases, on-site services, high-powered lasers, or non-denatured ethyl alcohol.

- For goods purchased from another country that will need to go through Customs.

- To order items that are a radioactive or controlled substance.

The Purchase Requisition Form should not be used:

- To place nonconforming orders. Nonconforming orders should be processed on a Banner requisition form.

Based upon your responses to the questions within the form, you will be prompted to answer and provide more details.

1. On the iBuy homepage under the **University Forms** section, click **Purchase Requisition Form**.

2. Review the instructions and click the job aid link for more information.

3. Click **Next**.

4. Enter the Supplier Name or Supplier ID (@############) in the **Supplier** field.
   
   **NOTE:** Do not populate the other fields.

5. Click **Search**.

6. Select the Business Purchases address.
   
   **NOTE:** By default, the preferred BP address will be bold and selected. Unless otherwise instructed, this should be the address used.

7. Click **Next**.

8. Click **Next** on the **Form Fields** page. There is no action required.
9. Answer the following questions about the purchase request:

- **Does the purchase have supplier terms and conditions to which the University must agree in order to purchase the goods or services?** Yes or No.
  - A link to the Restricted Items and Purchases Requiring Special Approval on the OBFS website will be provided.

- **Is the purchase for goods or services restricted as detailed in purchasing Section 7.2, Policy & Procedures?** Examples include but not limited to: telecommunication equipment, weapons, furniture, chartered services, lab gases, on-site services, high-powered lasers, or non-denatured ethyl alcohol. Yes or No.

- **Is this purchase for goods from another country that will need to go through Customs?** Yes or No.

For **Radioactive Substances**:

- **Does this order contain Radioactive Substance products?**
  - If No, no additional information needed.
  - If Yes, enter information in the following fields:
    - Project/Permit Number
    - Principal Investigator (PI)
    - Radioactive Materials Type
      - **Long Life:** Having a half life greater than or equal to 90 days
      - **Short Life:** Having a half life less than 90 days

10. Click **Next**.

11. In the **Quantity** drop-down, select the number of line items on the requisition.

   **NOTE:** If requisition has more than 10 items, create a single line item with the total cost of requisition and attach supplier quote to requisition. Based upon the number selected from the drop-down menu, the form will provide enough fields for up to 10 items.

12. Enter information in the following fields:

- **Unit Price**
- **Quantity**
- **Unit of Measure**
  - **NOTE:** This is usually **EA - Each**.
- **Product Description**
- **Catalog No.**
- **Commodity Code**
  - Click **Edit** next to the **Commodity Code** field.
Enter a partial commodity code (example: 640XX) or description (example: Bags).

Click Search.

Click Select for the appropriate Commodity Code.

13. Answer the following question about the Freight/Shipping Charges: Does this order contain Freight/Shipping Charges?

NOTE: Adding freight costs to your order indicates that the University is responsible for payment of Freight/Shipping Charges. Even if the amount entered is an educated guess, it is important to populate this field. If Freight/Shipping Charges are not entered, it is assumed the Supplier invoice will not have freight charges, and the University will not be paying any freight costs. If there are multiple shipping fees, the Freight/Shipping Charges line should be a sum of all shipping costs for this order.

- If No, no additional information needed.
- If Yes, enter information in the Unit Price field.

14. Click Next.

15. Answer the following question about the Purchase Information: Is your order $10,000 or more?

- If No, no additional information needed, unless your order falls within the guidelines of the bullet point below. This applies regardless of the amount of the requisition.

- If this purchase is based on a Bulletin posting (for RFP, IFB, Sole Source, Exemption, Cooperative) or Contract, please fill in the Bulletin Number and/or iCS Contract Number in the Internal Notes and Attachments section of the Requisition.

- If Yes, answer the following question: Were three quotes obtained from different competitive sources?

  - If Yes:

    ▪ Written, email, or faxed quotes should be attached to the requisition; detail verbal quotes in Internal Notes of the requisition with date, vendor contracted, and quoted price; Internet searches should identify websites or links providing vendor and pricing.

    ▪ Was at least one quote obtained from a diverse vendor? Yes or No.

      ▪ Certified BEP Directory

  - If No:

    ▪ Select the reason why multiple quotes were not possible from the following options (and provide additional information in the Internal Notes as appropriate).

      ▪ Supply/service is not available from multiple vendors.

        ○ If this purchase is based on a Bulletin posting (RFP, IFB, sole source, exemption, cooperative) or contract, please fill in the Bulletin Number
and/or Contract Request Number in the Internal Notes and Attachments section of the Requisition.

- **Purchase is being made from an awarded contract.**
  
  - If this purchase is based on a Bulletin posting (RFP, IFB, sole source, exemption, cooperative) or contract, please fill in the Bulletin Number and/or Contract Request Number in the Internal Notes and Attachments section of the Requisition.

- **Urgent need for the supply/service that does not allow time to obtain multiple quotes.**
  
  - If this purchase is based on a Bulletin posting (RFP, IFB, sole source, exemption, cooperative) or contract, please fill in the Bulletin Number and/or Contract Request Number in the Internal Notes and Attachments section of the Requisition.

- **Other (Provide Justification Below)**
  
  - If quotes were not obtained, provide qualifying information within the provide box.

16. Click Next.

17. The Review and Submit requisition screen will appear. There is no action required. Click Add and go to Cart.

   **NOTE:** To edit the requisition, refer to Edit the Requisition Before Submitting the Order section below.

18. Click Proceed to Checkout.

19. Review the cart and make any necessary changes.

20. Enter information or add attachments in the Internal Notes and Attachments section, if needed.

   **NOTE:** If this purchase is based on a Bulletin posting (for RFP, IFB, sole source, exemption, cooperative) or contract, please fill in the Bulletin Award Number and/or iCS Contract Number in the Internal Notes and Attachments section of the Requisition. If you are providing an iCS Contract Number, please use the format CN-XXXXXXXX.

21. Click Save.

22. Click Place Order on the top right-hand corner of the screen.
Editing the Requisition Before Submitting the Order

1. Under the Production Description section, click Purchase Requisition Form.
2. Click the section of the form you need to edit.
   - NOTE: Much of what would be editable is within the Order Details section.
3. Edit and click Save Progress.
4. Click Back to Cart on the top left corner of the Purchase Requisition Form.

Using an Alternative Shipping Address

1. Under the Shipping section, click Edit...
2. Enter the appropriate address by applying one of the following options:
   - Option 1: Choose from Your Addresses
     - Select the address from the address options previously added.
     - NOTE: Refer to the Setting Up and Using Ship To Addresses job aid to add additional address options to your profile.
     - Click Use under the desired address.
   - Option 2: Select a New Address
     - Enter a portion of the Banner Ship to Code or a portion of the address.
     - Click Search.
     - Click Use.
3. Enter the ultimate destination in the Location field.
   - NOTE: Information must be entered in the Location field. This can be a specific room number, a campus mail code, or an email address.
4. Click Save.
Editing FOAPAL Codes

1. Under the Accounting Codes section, click Edit...

2. Enter the appropriate accounting code by applying one of the following options:
   - Option 1: Select from your code favorites
   - Option 2: Select from profile values...
   - Option 3: Select from all values...
     - Search by Value (200250-1), or Description (103 Indirect Cost Recovery), or a portion of either Value (200) or Description (Indi).

3. Click Add Split to split FOAPAL codes and repeat step 1-2 above.
   **NOTE:** For more information, see the Splitting FOAPAL Codes job aid.

4. Click Save.

Notes and Attachments

Internal Notes and Attachments will not go to the Supplier or Banner and can be shared between departments.

External Notes and Attachments will go to the Supplier, and External Notes will go to Banner.