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.
  
  o **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.
   
   a. **NOTE:** Do not populate the other fields.

5. Click **Search**.

6. Select the Business Purchases address.

   a. **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 a contract or 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.

   a. **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
  o Click Edit next to the Commodity Code field.
  o Enter a partial commodity code (example: 640XX) or description (example: Bags).
  o Click Search.
  o Click Select for the appropriate Commodity Code.

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

   a. 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, 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.

   o 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?

     o 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
  o 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.
      o 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.
      o 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.
      o 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)
      o 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.
   a. 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 by clicking the pencil icon to edit the fields or add notes and click Add to include an attachment.
a. **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 Changes**.

22. Click **Place Order** on the right-hand side of the screen.

**Editing the Requisition Before Submitting the Order**

23. Under the supplier details on the Summary page of the requisition, click **Purchase Requisition Form** blue link.

24. Click the section of the form you need to edit.

   a. **NOTE:** Much of what would be editable is within the **Order Details** section.

25. Edit and click **Save Progress**.

26. Click **Back to Cart** on the top left corner of the Purchase Requisition Form.

   a. **NOTE:** Do not click save and move back through the form otherwise you could duplicate the line items on the order.

**Using an Alternative Shipping Address**

1. Under the **Shipping** section, click **Edit** (pencil icon).

2. Enter the appropriate address by applying one of the following options:

   - **Option 1:** **Choose from Your Addresses**
     - Select the radio button next to 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.

   - **Option 2:** **Select a New Address**
     - In the search box below the list of current Ship To set up, enter a portion of the **Banner Ship to Code** or a portion of the address.
     - Click **Search**.
     - The address(es) will populate within your current address list. Select the radio button of the address you want to use.
3. Enter the ultimate destination in the **Location** field.
   a. **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 Changes**.

**Editing FOAPAL Codes**

1. Under the **Accounting Codes** section, click **Edit** (pencil icon).

2. Enter the appropriate accounting code by applying one of the following options:
   - Option 1: Select from your code favorites by hovering over the right-hand corner of
     the pop-up window and click **Favorites** (heart icon).
     o Click from the list of saved nickname codes.
   - Option 2: Search by **Value** or **Description**.
     o Click the arrow within the box of the accounting code you need to change.
     You can type the number in the box, select from the values that are saved,
     or click **Search** to search by number or **Description**, or a portion of either
     **Value** or **Description**. Click **Add Split** (plus sign) to split FOAPAL codes and
     repeat steps 1-2 above.
     - Please note you cannot select a second favorite when splitting a
       FOAPAL. You must manually enter the second FOAPAL string.
   a. **NOTE:** For more information, see the [Splitting FOAPAL Codes job aid](#).

3. Click **Save Changes**.

**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.