

Requisition Checklist

- 1. Begin by using the “Express Item Entry”
- 2. On the Details tab, please enter a complete item description. We DO NOT use Item ID in MDConnect. If you need to see a big area to type your detailed and complete item description, please expand the box by using the little box with the arrow to the right.
- 3. If this is an “Amount Only” requisition, please select a quantity of 1 and the total should be what you want to allocate for the year.
- 4. Select an Item Category that best fits your need. Try to select one that is as close to what you are buying as possible.
- 5. Next, click on the Supplier Information tab. Make sure the Supplier selected is accurate. Review Supplier details like location and/or address. You can verify the information by going to Financials>Suppliers>Supplier Information>Add/Update>Review Supplier.
- 6. If you DO NOT select a supplier for EACH Item you will delay the processing of your requisition, as well as multiple Purchase Orders.
- 7. If you are done with your items, click Add to Cart and then click Checkout.
- 8. On the Checkout page, there are several fields that need to be completed.
 - Enter a requisition name if you wish, otherwise it will default to the requisition ID. You can enter a supplier name here, BUT this is not where you enter your Supplier info. (Please see #5)
 - Click on the details link to check the box for Amount Only purchases.
 - You can add comments at the line level or at the requisition (header) level. If you want to enter the quote you can save to either location.
 - You will need to expand the triangle to the left of the line to get to the chartstring information.
 - Once expanded, you can click on the chartfield 2 tab and enter your complete chartstring. DO NOT enter the Budget Reference. If you are a FUND 2 or 7 you will have to enter the PC Bus Unit, Project ID and Activity. Those are required fields now.
 - In this section you can also add an Attention To: person (it should be yourself or whoever you are preparing the purchase for).
 - Please select a due date that is not equal to the day you are entering your requisition. It is ideal to select a date of at least 2 weeks in the future.
 - You can also add a One Time Address for items that are being shipped to your Dept (Amount Only/Services)
- 9. Requisition comments. Please enter your contact information, such as Name, Dept, Email, Phone and Room #. This will assist Receiving with getting your items to you in a timely manner. Make sure to select SHOW AT RECEIPT for this comment.

*****Note*****

****ALWAYS CHECK BUDGET, NOT Pre-check budget. You have to Check Budget to pre-encumber the funds. Also, if you do pre-check budget it will not be sourced as a Purchase order until it get budget checked by either the Approver or Purchasing.**

****You then will need to Save and Submit to send for approval if ready or Save for later to submit at a later time. Just don't forget that it is there and if you have budget checked it Valid it is holding pre-encumbered funds.****