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Now it is your turn to practice this task. Reference the steps below to complete the Requisition process.

**Exercise 1: Hosted Catalog (ON CONTRACT) Requisition**

Steps

1. Search for items in a catalog
2. Navigate to the **Shop** *(Catalogs)* **tab.**
3. Select **Search Products** *(Browse Items)* in the drop down menu.
4. Utilize the search bar to locate your product(s).
5. Add items to your cart
6. Upon locating desired item(s) enter desired quantity, then Select **Add to Cart** *(Shopping Cart)* button.
   1. As items are selected, they will move to your cart on the top right corner automatically.
7. Select **Checkout** *(Go to Requisition)* where your cart is shown in the top right.
8. Check Out Page (New Page)
9. On the right pane under Requisition Details select your **Organization**.
10. Select **Ship to** address.
    1. Information on your items should auto populate.
11. Select **Go to Requisition** to complete the requisition.

1. Complete Requisition
2. Complete Header information:
   1. Edit the **Name** *(Short Description)*
   2. Select **Site**
   3. Select **Ship to** *(Delivery Address)*
   4. Select **Bill to** *(Invoicing Address)*
3. Select **Save**.
4. Select the **Pencil** icon next to the Item you would like to edit.
5. Edit **Name** *(Short Description)*of theline item and complete the mandatory details (Repeat as needed):
   1. Select a **Tax** rate
   2. Select a **Supplier Contact** if one is not shown in the field.
   3. ExpandBudgetInformation field, Enter data:
      1. **Budget Fiscal Year**
      2. **Function**
      3. **Object**
   4. Select **Save and Close**
6. Select **Submit Requisition** *(Submit for Approval)*

**Exercise 2: Create an OFF-CONTRACT Requisition**

Steps

1. Open a new Requisition
2. Navigate to the **Procurement** tab
3. Select **Create** in the drop down menu.
4. Complete Header information:
   1. Select **Site**
   2. Select **Off Contract** in **Requisition Type**
   3. Enter a **Name** *(Short Description)*
   4. Select **Save**
   5. Select **Ship to** *(Delivery Address)*
   6. Select **Bill to** *(Invoicing Address)*
   7. Select **Save**
5. Add the “Off Contract” item to the Requisition (Repeat as needed)
   1. Select **Add a Free Text Line.**
   2. Complete the **Item Details** page:
6. Enter a **Name** *(Short Description)*
7. Choose a **Commodity**
8. Enter a **Quantity**
9. Select a **Unit of Measure**
10. Enter **Price**
11. Select a **Tax**
12. Enter a **Supplier Name**
13. Enter **Supplier/Distributor**
14. Choose **Supplier Contact**
15. Select **Save**
16. Expand **Budget Information** field, Enter data:
17. Budget Fiscal Year
18. Object
19. Agency
20. Function
21. Select **Save and Close**
22. Select **Submit Requisition** *(Submit for Approval)*

**RECEIVING**

**Exercise 1: Create a Receipt**

Steps

A. Find purchase order

1) Navigate to the **Procurement** tab.

* 1. Select **Browse Orders.**

1. Search in **Keywords** for the Purchase Order you would like to create a receipt for.
   1. Locate the desired PO.
   2. Select the **Pencil icon** to edit.

B. Create the Receipt

1) Select the **Create Receipt** *(Create a Receipt)* button at the top of the page.

2) Fill in the following fields of the receipt:

a**. Receipt Description.**

b**. Delivery Date.**

c. **Location Received** *(Delivery Location)*

C.ConfirmReceipt

1) Validate Supplier and order

a. Select **Save.**

2) **Add** or **Edit** lines from order.

3) Select **Submit Receipt.**

**Exercise 2: Deleting a Receipt**

Steps

1. Find Receipt

1) Navigate to the **Procurement** tab.

a. Select **Browse Receipts.**

2) Search in **Keywords** for the receipt you wish to edit.

1. Confirm it’s the correct receipt.
2. Select the **Trash icon** *(“X”)* on the line of the receipt you wish to delete.
3. On the popup Select **Ok**

**Exercise 3: Creating a Receipt through Pending Receipts**

A. Find line Items from purchase Order

1) Navigate to **Procurement** on the top menu.

a. Select **Pending Receipts**.

2) Check the box on the left side of the line item(s) you would like to receive.

a. Choose only line items from the same PO.

3) On the right side enter in the quantity you wish to receive.

B. Create Receipt

1) Select the **Create Deliveries** *(Create Receipts)* button.

2) Fill in the following information:

a. Delivery Location.

b. Description.

C. Select **Validate**.

**Exercise 4: Creating a Return**

A. Find Receipt

1) Navigate to **Procurement** on the top menu.

a. Select **Browse Receipts**.

2) Use the Keywords section to browse for the particular receipt you are looking for.

a. The receipt must be in “Accepted” status for you to create the return.

3) Open the receipt by selecting the **Pencil** icon.

B. Create return

1) Select **Create Return** at the top of the page.

2) Fill out the following fields:

a**. Receipt Description** *(Return Description)*

b. Shipping Place.

3) Select Save.

4) Navigate to the **Line item** section on the receipt.

1. Select the **Pencil** icon next to the item you wish to return.
2. *Enter the quantity you are returning in the* ***To Be Returned*** *field.* (SPO Looking into this step)
3. Select Save and Close.

5) Select **Schedule Return.**

6) Select **Confirm Shipping.**

7) Select **Confirm Receipt.**

**CHANGE ORDER**

On Contract

1. Find purchase order

1) Navigate to the **Procurement** tab.

* 1. Select **Browse Orders.**

1. Search in **Keywords** for the Purchase Order you would like to create a receipt for.
   1. Locate the desired PO.
   2. Select the **Pencil icon** to edit.
2. Select **Change Order**
   1. Make note of your new requisition number.
3. Select **Back to Catalog**
   1. Search for products on original order.
4. Select the lower filled in **Cart** Icon
   1. Select appropriate requisition from the drop down menu. (Original ordered items should appear.)
   2. Add new items
   3. Select **Checkout**
5. Select **Go to Requisition**
6. Select the **Pencil** icon next to the Item you would like to edit.
7. Edit **Name** *(Short Description)*of theline item and complete the mandatory details (Repeat as needed):
   1. Select a **Tax** rate
   2. Select a **Supplier Contact** if one is not shown in the field.
   3. ExpandBudgetInformation field, Enter data:
      1. **Budget Fiscal Year**
      2. **Function**
      3. **Object**
   4. Select **Save and Close**
8. Select **Submit Requisition** *(Submit for Approval)*

**APPROVALS**

**Exercise 1: Reviewing and Approving a Purchase Requisition**

Steps

1. Locate Requisition
   1. Navigate to the **Procurement** tab.
   2. Select **Browse Requisitions.**
   3. Enter the Requisition number in **Keywords** for the order that needs to be reviewed.
2. Locate the desired requisition.
3. Select the **Pencil icon** to edit.
   1. Review the information in the following fields of the requisition:
4. Header
5. **Ship to** *(Delivery Information)*
6. **Bill to** *(Invoicing Information)*
   1. Select the **Pencil** icon on the item
7. Quantity
8. Price
9. Tax
10. Budget Information
    1. Modify **Budget Information** if needed.
       1. Update data in the appropriate fields.
       2. Add **Comments** to explain changes made.
11. Select **Save and Close.**
12. Submit Requisition
    1. Select **Approve** or **Reject**.