



How to Create a Requisition in Self Service


Log into Self Service


Select Financial Management

Hello, Welcome to College of Eastern Ida...
Choose a category to get started.

 **Student Finance**
Here you can view your latest statement and make a payment online.


 **Banking Information**
Here you can view and update your banking information.


 **Employee**
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.

 **Financial Management**
Here you can view the financial health of your cost centers and your projects.

Select Procurement

Financial Management Overview

 **Budget to Actuals**
Here you can view the financial health of your cost centers.


 **Procurement**
Here you can create and maintain your procurement documents.

On the main Procurement page, you may view: requisitions, purchase orders or create a new requisition.

To create a new requisition, select Create


Procurement

View **Create**

 Filter

Document Types: Requisition, Purchase Order, Payment Request

Requisition

Requisition Date	Requisition	Total	Approvers/Next
12/22/2020	0001464 PO Created 0112345 East Central Idaho Planning & Devel	\$10,000.00	 Don Bourne

The requisition page will be displayed. See the notes below for each line.

View

Create

Document Type *

Requisition

Requisition Date *

01/27/2021

Initiator

Initiator Lookup

Heidi Moore X

Confirmation Email Address *

heidi.moore@cei.edu

Add email addresses separated by commas

Ship To *

MC College of Eastern Idaho

Desired Date

MM/DD/YYYY

These three fields will automatically populate.

Verify your email address has auto populated. You can add more email addresses here if you need anybody else to receive the notification.

This field will automatically populate.

Enter the Desired Date. If you don't know when your item will be delivered, enter a date 30-45 days from the date of the requisition entry.

Vendor ID

Vendor Lookup

Enter the Vendor name. If the vendor is not in the system, leave this field blank. Obtain a W-9 from the company and submit it with your requisition.

Miscellaneous Vendor

Misc Vendor

Miscellaneous Vendor field - Not Allowed.

Person Vendor

AP Type

AP Accounts Payable

AP Type automatically populates.
Tax Codes – Not Allowed

Tax Code 1

None

Tax Code 2

None

Tax Code 3

None

The Approvers section will be addressed after the entering of the requisition line items.

Items

Line Items	Description	Quantity	Unit	Price	Extended Price
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Add Item

Select **Add Item** to add a line item.

Cancel Save Save and Attach

Items

Line Items	Description	Quantity	Unit	Price	Extended Price	
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New Item

Description *

Line 1 - 25 Characters
Line 2 - 25 Characters
Line 3 - 25 Characters (Use this line for the Item #)

Description: Enter the item description and then the item number. The purchase order will only print **3** lines with **25 characters in a line**.

Quantity *

15

Unit

BX Box

Price *

17.0000

Enter the Quantity, Unit of Measure and Price.

GL Account *

10-01-07-10200-5390

10-01-07-10200-5390 Fiscal Operations : Miscellaneous Supplies

Enter the G/L (PCA) and enter. The options will be in a drop down under the G/L account field. Write this number down to include in the comment section. If you need to add multiple G/L accounts see notes on Page 7.

Amount *

255.00

The total amount will automatically populate.

Add GL Account

Cancel

Add Item

Cancel

Save

Save and Attach

Select the Add Item if you need to add more lines. Follow the steps above.

Do not Save the document yet.

Once the line items are entered, scroll to the top to the Approvers and comments section.

Do these next steps in the following order: Printed Comments, Internal Comments, Next Approvers.

Approvers	Approval Date
Next Approvers 3 <input type="text" value="Next Approver Lookup"/>	Last Step: Do after the requisition is completely entered and ready for the approval. Enter the next approver. Use Approval sheet provided by the Procurement Department. Enter first and last name. Select the correct name that is displayed. See Note on Page 6
Printed Comments 1 <input type="text"/>	Enter the comments that will need to print on the purchase order. Make sure that the "College Use" section is entered here. This field is important that the information is entered as noted. See Note on Page 6
Internal Comments 2 <input type="text"/>	Leave Internal Comments Blank

Sample Printed Comments

As Per Quote #12345

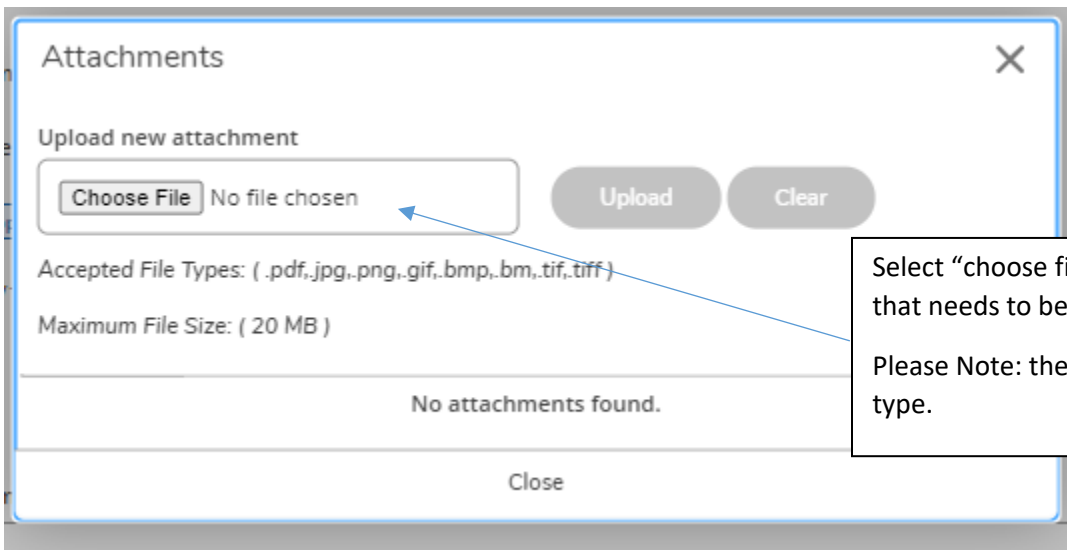
College Use:
GL 10-01-07-10200-5301
V #113293
(Heidi Moore / Malcolm Guess)

When the requisition is complete select Save or Save and Attach. The Save and Attach option is to attached a quote or any documentation that will be helpful for the purchase. You may return to the requisition and modify if it has not been approved. See note on Page 9.

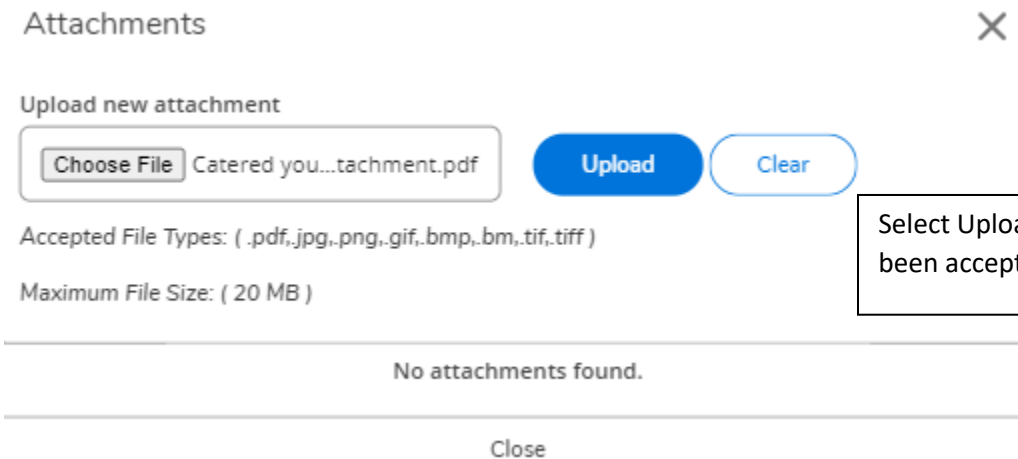
Add GL AccountCancelAdd Item

CancelSaveSave and Attach

If you have selected “Save and Attach” a pop up will appear:



Select “choose file” and then select your file that needs to be attached.
Please Note: the file must be a pdf or jpg type.



Select Upload and then after the file has been accepted, close the box.

After you have “Saved” or “Saved and Attached” your requisition is complete, you will need to select the “View” tab at the top of the page to view your list or create a new requisition.

After the requisition has been saved, the initiator will receive an email with the details of the requisition. This email will need to be printed and submitted to the Procurement Department. Attached any supporting documentation to the requisition.

Notes:

Next Approver field

If you need to return to the requisition to complete, it is best if the Next Approver field is left blank until the requisition is complete. If the approver is selected, he/she will be sent an email to approve the requisition.

Printed Comments Field:

This field is for information that needs to be printed on the purchase order: i.e.: Any information/instruction for the vendor and the “College Use” information needs to be entered here. Each line can have 25 characters. Please make sure that each line does not exceed the character limit. There are no line limits.

Put in the Printed Comments field:

Relevant Information (Quote Number, Invoice Number)

College Use:

GL (Full GL account number, i.e.: 10-01-07-10200-5301)

Vendor #113293 (this number can be found above under the Vendor ID field.)

Requestor Your Name and / or Instructor Name

(Requestor and the individual ordering for)

College Use:

GL 10-01-07-10200-5301

V #113293

(Heidi Moore / Malcolm Guess)

Steps of a Requisition/Purchase Order:

1. Create your requisition and save
2. You will receive an email with the details of the requisition, print this email and turn it into the Procurement Department with the supporting documentation (quote, invoice, specks, etc.)
3. Your Supervisor will receive an email, so that they may go in and approve your requisition
4. After it is approved the Procurement Department will receive notification that your requisition is in the Approved state
5. The Procurement Department will then create your purchase order
6. When the purchase order is created, the Procurement Department will (a) place the order on your behalf and copy you on that correspondence, providing a copy of the purchase order (b) provide you a copy of the purchase order and then turn your purchase order and invoice over to Accounts Payable.

Add GL Account

If you need to charge multiple GL accounts (PCA), Select the Add GL Account button. An additional line will be displayed. Enter the PCA that needs to be charged. The amounts have to equal the total amount of the requisition total.

GL Account *

10-01-07-10200-5390 ⊗

10-01-07-10200-5390 Fiscal Operations : Miscellaneous Supplies

Amount *

900.00 ⊖

GL Account *

10-01-02-10100-5390 ⊗

10-01-02-10100-5390 Executive Management : Miscellaneous Supplies

Amount *

Add GL Account

Cancel Add Item

Write down the G/L to add in the comments section

If you need to delete one of the accounts, select the Red Stop icon.

Edit an existing requisition:

Select/click on the requisition number

View Create

Filter Collapse

Document Types: Requisition, Purchase Order, Payment Request

Requisition

Requisition Date	Requisition	Total	Approvers/Next Approvers
1/27/2021	0001479 Not Approved 0116660 The Yard Butler LLC	\$3,750.00	
12/22/2020	0001464 PO Created 0112345 East Central Idaho Planning & Devel	\$10,000.00	✓ Don Bourne +2

The page will open to the right of the screen. To edit the requisition, click on the pencil, you may also view your attachments from this screen.

The screenshot shows a 'Requisition Details' window with a close button (X) in the top right. The requisition ID '0001511' is displayed with a pencil icon for editing. Below the ID are three tabs: 'Overview' (selected), 'Approvers', and 'Line Items'. The main content area lists the following details:

Status	Not Approved
Vendor	0112302 Catered Your Way
Amount	\$1,125.00
Maintenance Date	7/13/2021
Initiator	Heidi Moore
Requestor	Heidi Moore

Below the details is an 'Attachments' section with a 'View 1' button. Underneath is an 'Additional Details' section with a dropdown arrow. This section contains two sub-sections: 'Printed Comments' with the text 'test 2' and 'Internal Comments'. At the bottom, a warning message states: 'Warning: All line items on this document have been populated with default tax form information from the chosen vendor.'



The requisition screen will open up and can be modified at this point. When all the changes have been done, select Save at the bottom of the page. You will receive an email confirmation of the changes that were made. The approver (s) will also receive an email stating that they need to approve the requisition. When the requisition has been completed, you will receive an email notification. That will be your only copy of the requisition. Please send this email requisition along with any supporting documentation to the Procurement Department. Once the requisition has been approved and The Procurement Department has received your requisition along with the supporting documentation, your purchase order will be created.

To view the status of Requisitions and Purchase Orders:

Status Key:


Not Approved	Requisition is waiting for approvals
Outstanding (Purchase Order)	Purchase Order has been issued and is waiting for product
Backordered	Partial order has been received
Accepted	Complete order has been received and is waiting for the invoice
Invoiced	Accounts Payable has started the payment process
Reconciled	Check has been issued

On the Procurement page, the status of the requisition will be to the right of the requisition number. You can also go into the requisition by selecting the requisition number.

Requisition Date	Requisition		Total	Approvers/Next Approvers
10/23/2020	0000825 Not Approved	0112575 Post Register	\$4,568.00	 Heidi Moore
8/31/2020	0000824 Not Approved	0113844 Porter's Office Products	\$895.00	 Heidi Moore

If the purchase order has been created, you can view the detail in the requisition screen or you can scroll down to the purchase order. If you are in the requisition screen, you can select the tabs to view the overview, approvers, and line items.

Requisition Details ✕

[0001511](#) 

Overview Approvers Line Items

Status Not Approved

Vendor 0112302 Catered Your

You can also select the arrow on the Additional Details area to see more detail.

Requestor

Purchase Orders P0001059

Additional Details ^

Date 12/23/2019

Status Date 12/26/2019

Desired Date 1/31/2020

AP Type AP Accounts Payable

Ship To MC College of Eastern Idaho

Commodity Code

Comments

As Per Quote #0028048 College Use:
\$1,034.00 36-01-06-36106-5390 \$1,398.00
10-01-01-50050-5390 \$2,097.00 18-01-00-50399-5390 V #113293 (Christy Haack, Betsey Pitts, Becca Killion)

Internal Comments

To exit the screen, select the X at the top

Requisition Details X

0000812

Overview Approvers Line Items

Purchase Order	Initiator/Requestor	V	Status	
	Heidi Moore	C	PO Created	
	Heidi Moore	F	Vendor	0113293 State of Idaho
			Amount	\$4,529.00
			Maintenance	12/23/2019