Creating a Requisition
Intended Audience: Campus Community

To access Purchasing documentation, you will need to be in LionLink’s Finance Pillar. Select the “FSCM” hyperlink on the top right-hand side of your screen or the “Financials Self Service” tile on the left-hand side of your screen.

Navigation Path: Navbar > Navigator > Purchasing > Requisitions > Add/Update Requisitions

1. The Requisitions Search Page displays.

2. Confirm that the “Add a New Value” tab is selected.

3. Enter the LWTech Business Unit (WA260) into the “Business Unit” field.

4. Confirm that “NEXT” is entered in the Requisition ID field.
   a. Do not put in your own requisition ID. Leave it as “NEXT.”

5. Select the “Add” button.
6. The “Maintain Requisition” Page displays.
   a. The required fields are noted in red.

7. From the Requisition page, the “Requester” field displays the ID of the person logged into the system and entering the requisition.

8. Enter a “Requisition Name.”
   a. Always include the vendor’s name and your department name in the requisition name.
      i. Example: OFFICEDEPOT_PURCHASING
   b. Give the requisition a name that you will be able to track.
   c. If this requisition is on an open PO, indicate so in the requisition name.

9. Use the “Requisition Date” field to enter the creation date of the requisition. The field default value is the current system date.
   a. Always use the current date.

10. The “Origin” field provides information about the origin of the requisition.
    a. Please use “ONL”, meaning that the requisition is being generated online.

11. The “Currency Code” field displays the requisition transaction currency.
    a. This should be set to USD.
12. The value in the “Accounting Date” field determines the open period or allowable open date range for budget checking a requisition.
   a. Always use the current date for “Accounting Date.”

13. Select the “Add Comments” link to enter comments for a transaction. You can enter a unique comment or select from predefined standard comments.
   a. Include a room number for delivery purposes.

14. Select the “Show at Voucher” and “Send to Supplier” checkboxes.

15. Use the attachments function by selecting the “Attach” button. **Attach all supporting documentation for the purchase.**
   a. For specific products, please attach a hyperlink to the item or a quote for the item.

16. Select the “OK” button.

   **Note:** If you are creating a requisition with many line items that will be charged to the same budget, you can use the “Requisition Defaults” to input the chartstring that you would like to be charged. That chartstring will then automatically populate for all line items at step 32. Simply click on the Requisition Defaults hyperlink...
Scroll to the bottom of the Requisition Defaults page and input the desired chartstring in the Distribution line.

17. Go to the Requisition “Line” subsection and select the “Details” tab. The Details tab will display.
   a. The required fields are noted in red.
   b. The Requisition Line is where you enter what it is you want to buy, by specifying and Item ID (if possible), Description, Quantity, Unit of Measurement (UOM), and Category.
   c. For each individual item that you are purchasing, you must add a separate line by using the “+” button.
      i. Note: Price will not be input at this step. Price will be entered later in the requisition.

18. In the “Item” field, enter the ID of the item that you want to order.
   a. If you don’t know the Item ID, then click the magnifying glass in the item field and select from the displayed list.
   b. After selecting the Item ID, a description for that item will automatically populate in the Description field. Please delete that description and enter a more specific description of the item you are ordering.

19. Enter how many of said item you would like to purchase into the “Quantity” field.

20. Use the “Unit of Measure” field to enter a default unit of measure for the requisition.
   a. Any “UOM” will work, but pick one that is relevant to the item you are purchasing.
21. Click on the “Ship To/Due Date” tab in the Line subsection.
   a. The required fields are noted in red.

22. On the “Ship To/Due Date” tab, enter the desired information into the Due Date field.
   a. Input any date in the future or leave the field blank.

23. Use the “Ship To” field to enter the default location to where the supplier will ship the order.
   a. Always ship to “LWSHIPREC”.

24. Click on the “Supplier Information” tab in the Line subsection. The Supplier Information tab will display.

   ![Supplier Information Tab](image)
   a. Item and Description should auto populate based on the information entered on the Details tab.

25. Enter the desired “Supplier ID” if you have this information
   a. If you do not, click on the magnifying glass and select your desired supplier.
      i. Note: The Purchasing Services Department will provide a list of LWTech ready suppliers.
      ii. If you do not find your desired supplier, contact the Purchasing Services Department.
   b. If the supplier does not exist in the system, please email the Purchasing Services Department (purchasing@lwtech.edu) and request that the supplier is added to the system. In the subject line of the email, write “Supplier Add Request.”

26. Note: You may get a "Supplier item price is not available - use item standard price" message. If applicable, select the “OK” button to return to the Supplier Information tab.

27. Select 260 in the “Location” field.

28. Click on the Details tab in the Line subsection once again.

29. Select the Schedule Icon button to access the Schedule page, where you can view schedule shipment details and distribution information for each line item. The Schedule page will display.
30. On the Schedule page, use the “Attention To” field to define the person to whom the goods will be delivered.

31. Select the **Distribution Icon** button on right hand side.

32. The **Distribution Detail** page will display with the available “**Chartfields**.”
   a. You may have to scroll right to see all of the available Chartfields.
   b. The required fields are: Account, Oper Unit, Fund, Class, Dept, State Purpose (and Approp for state funds only).
      i. For Grant and Capital budgets, you ALSO need PC Bus Unit, Project, and Activity.
   c. Please refer to the following crosswalks for Chartstring help:
      i. **Sub-Object to Account Code**
      ii. **Legacy Org to Department Number**

33. For Grant and Capital budgets, you ALSO need PC Bus Unit, Project, and Activity.

34. In the “**Percent**” field, enter the percentage of the item that you would like to charge to the chartstring you are about to input.
   a. If you are using multiple Chartstrings, this is where you decide how much of the item you would like to charge one Chartstring over another.
      i. Select the “+” button to add another Chartfield line.
      ii. The sum of Percentages must = 100%

35. The “**Quantity**” field will auto populate based on your prior inputs.

36. Enter the chartstring of the budget that you would like to charge.
   a. Found in SharePoint location (To be determined).

37. Click the “**OK**” button.

38. The **Schedule** page will display once again.
39. On the Schedule page, select the “Save” button.

40. The Requisition page will display once again.

41. On the Requisition page, from the Line subsection and on the Details tab, enter the appropriate information into the “Price” field.

42. Select the “Save” button

43. Notice that the “Requisition ID” and “Requisition Name” fields have been updated with the new requisition values. The Status field displays the requisition status.

44. Select the Budget Pre-Check icon to the right of "Budget Status."
   a. After Budget Pre-Check, the Budget Status should read “Prov Valid.”
b. If Budget Status reads, “Error” contact:
   i. Kelly Paustain (Kelly.paustain@lwtech.edu) for departmental budgets
   ii. Andrea Breen (andrea.breen@lwtech.edu) for grant budgets
   iii. Yan Li (yan.li@lwtech.edu) for capital budgets

c. Do not submit the requisition with a budget status of “Error” or “Not Chk’d”.

45. Select the green check mark icon to the right of the “Status” field to Submit for Approval.

46. The Status becomes “Pending” and Submit for Approval icon disappears.

47. Process Complete.

Note: You can check on the status of your requisition by selecting the “Document Status” hyperlink.