

Business Process	Navigation
<ol style="list-style-type: none"> 1. Identify the components of a requisition. 2. Identify the different types of requisitions. 	<ol style="list-style-type: none"> 1. Main Menu > eProcurement > Create Requisition 2. Main Menu > eProcurement > Create Requisition > 2.Add Items and Services

Process 1: Identify the components of a requisition

Use the following navigation to create a requisition.

1. From the Menu page, select **eProcurement > Create Requisition**.
2. A requisition **must** be created **prior** to any items being ordered or work done for the District. No work or ordering of items is to be done until a purchase order is issued and signed by the Purchasing Department and a contract (if a service) is signed by the appropriate District personnel.
3. ePro requisitions consist of these basic elements: header, line, schedule, and distribution.
 - a. The header contains the requisition number, requisition name, and requester. The header information is entered on the **1. Define a Requisition page**. Each requisition has one header, which can have multiple lines. Details for creating a requisition header are in a separate training quick reference guide titled Enter a Requisition – 1. Define a Requisition.
 - b. The line defines the goods or service you want to order and each item’s price. There are numerous requisition types which create a requisition line. The line information is entered on the **2. Add Items and Services page**. Each line can have multiple schedules/shipping lines. Details for creating a requisition lines are in a separate training quick reference guide titled Enter a Requisition – 2. Add Items and Services.
 - c. The schedule defines when and where you want the line items delivered. The shipping information defaults based on the Requester ID, item or item category and can be updated on the **3. Review and Submit page**. Each schedule can have multiple distributions. Details for creating a requisition schedules and distributions are in a separate training quick reference guide titled Enter a Requisition – 3. Review and Submit.
 - d. The distribution defines what ChartField values (budget codes) will be charged for the purchase, how much of the total price each ChartField combination should pay and, if the item is an asset, its asset profile. Some distribution information defaults based on the Requester ID, item or item category and should be reviewed or updated on the **3. Review and Submit page**.



4. Things to consider when entering a requisition:
 - a. You should only create a requisition for one vendor with the exception of when you purchase a computer using a pre-defined template which includes both the computer and the MS Office license.
 - b. iPads must be on a requisition by themselves.
 - c. You should not mix requisition types. For example, do not order items from the catalog and non-catalog items on the same requisition.
 - d. You should not put multiple subject textbooks on the same requisition (i.e. math and science textbooks should be on separate requisitions).
 - e. Be specific when entering a **Description** of the good or service on the requisition line. For example:
 - i. Instead of ordering a 'File Cabinet' you should request a 'File Cabinet, Model 98763, Color Gray, 4 Drawer'. If the description is too long include the information in the requisition comments.
 - ii. Textbooks must include the ISBN number.

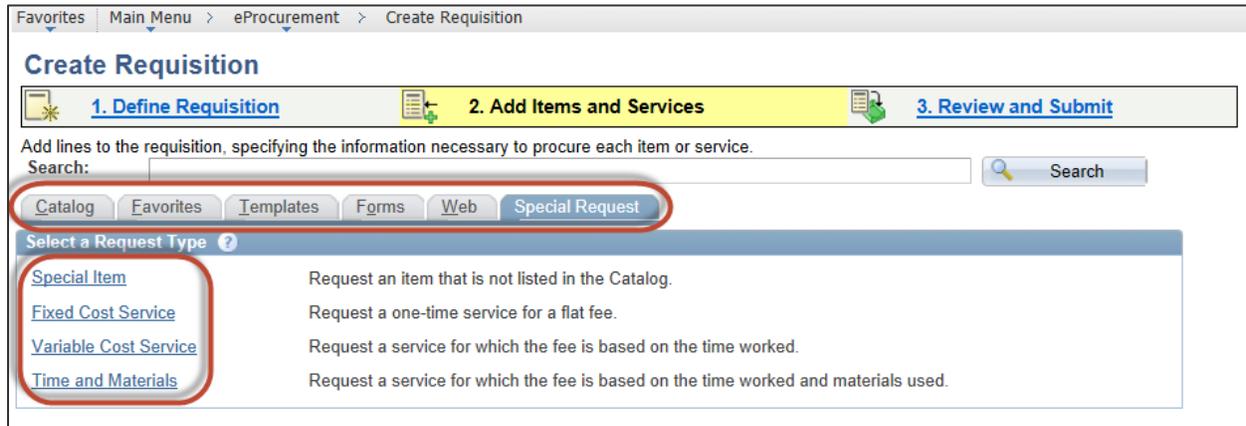
- f. Categories are required. Categories for goods begin with the numbers 0-8. Services categories all begin with the number 9.
 - i. There are similar categories designated for items with a price less than \$5000 and greater than \$5,000 (i.e. Audio Visual, Office Machines, Park Equipment)
 - ii. When selecting a service category for a company, select the category with the description 'Company'. If the service category for an individual select the category with the description 'Individual'. Attach a scanned copy of the vendor's W-9 and the contract for contracted service requisitions.
- 5. The **Requisition Summary** is the shopping cart and displays all the items added to the requisition. The summary also includes the total number of lines on the order and the total price.

Requisition Summary		
Description	Qty	UOM
CLEANER,DISH,ANTIBAC,25OZ	5	EA
ENVELOPE,#10,WE,WOVE,24#	5	BOX
CLEANER,DSNFCT,WIPES,FRSH	10	EA
TOWEL,ROLL,PERF,100SH/RL	1	CTN
Total Lines:	4	
Total Amount (USD):	166.81	

Process 2: Identify the different types of requisitions

Use the following navigation to create a requisition.

1. From the Menu page, select **eProcurement > Create Requisition > 2.Add Items and Services**
2. Each requisition type is a form which creates the requisition line. All types contain the required fields for completing a requisition line, such as description, unit of measure (UOM), category, quantity and price. Other fields, such as work hours, quote number, quote date, service beginning date and completion date apply only to specific requisition types.
3. PeopleSoft provides the following requisition types within ePro; Catalog, Favorites, Templates, Express Forms, Web (Direct Connect Punchout), Special Request – Special Item, Special Request – Fixed Cost Service, Special Request, Variable Cost Service and Special Request – Time and Materials.



4. The type of goods or services you are ordering determines which type of requisition is the best to use. The table below provides an overview of each type.

Type	Description
Catalog	Catalog requisitions are used when an Item exists. Current items include textbooks and pre-approved computers and printers.
Favorites	Favorites are frequently ordered items. A favorite must be defined prior to creating a requisition from a favorite. You can add a requisition line to your Favorites when you create a requisition or by editing an existing requisition. Favorites are user specific.
Templates	Templates are sets of items that are frequently ordered. A template must be defined prior to creating a template requisition. You can create a template when you create a requisition. An example of a template would be laptop and MS Office license.
Express Forms	Express forms allow for heads down data entry and are ideal when you are creating a requisition with multiple requisitions lines. Express forms can be used if the requisition line has an Item or if you are ordering by description. Use this type for the purchase of goods only.
Web (Direct Connect / Punchout)	Web requisitions are used when ordering goods from Innovative Office Solutions or School Specialty. When using the web you are selecting your items from the vendor's website and loading the items back into ePro.
Special Request – Special Item	Special Items are used when ordering by description. An item does not exist in the catalog This type is typically used for the purchase of goods.

Type	Description
Special Request – Fixed Cost Service	Fixed Cost Service requisitions are used for a one-time service charge at a flat rate. It is typically used when you have bucket of money that is paid at once or over multiple invoices but the quantity on the requisition is 1. An example would be repair costs or consulting services where an hourly rate and designated number of hours are not defined.
Special Request – Variable Cost Service	Variable Cost Service requisitions are used for a service which the fee is based on the time worked at a specific rate. An example would be consulting services for 5 weeks at \$200 an hour.
Special Request – Time and Materials	Time and Materials requisitions are used for a service which is based on the time worked and the materials used. An example would be repair costs that include both parts and labor.