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create_requisition_1

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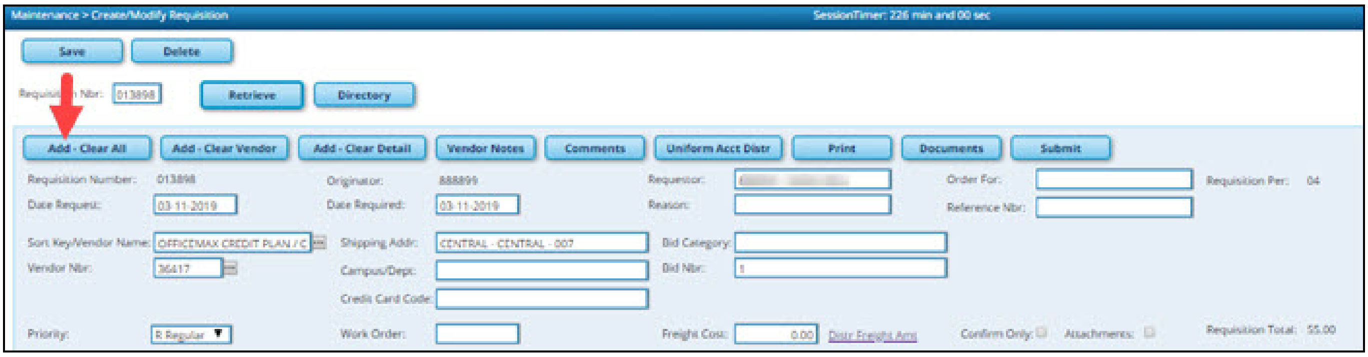

Requisition Nbr: 013898

Requisition Number: 013898
Originator: 888899
Requestor: [redacted]
Order For:
Requisition Per: 04
Date Request: 03-11-2019
Date Required: 03-11-2019
Reason:
Reference Nbr:
Sort Key/Vendor Name: OFFICEMAX CREDIT PLAN / C
Shipping Addr: CENTRAL - CENTRAL - 007
Bid Category:
Vendor Nbr: 36417
Campus/Dept:
Bid Nbr: 1
Credit Card Code:
Priority: R Regular
Work Order:
Freight Cost: 0.00
Confirm Only: ☐
Attachments: ☐
Requisition Total: 55.00

Field	**Description**
Originator	The name of the logged-on user is displayed.
Requestor	Type the name of the person or organization who is requesting the item(s). As you type the data, a drop-down list of corresponding data is displayed. Select the requestor. **Notes**: The requisition follows the requestor's approval path that is set up on the District Administration > Workflow > Approval Path page. If no requestors exist for the selected user on the District Administration > User Profiles > Purchasing Requestors tab, the originator is displayed in the requestor list. If requestors are added to the District Administration > User Profiles > Purchasing Requestors tab, the originator is limited to only those accounts that are associated with the requestor. The originator is also limited to the amounts entered in the **Req Max** and **YTD Max** fields on the District Administration > User Profiles > Purchasing Permissions tab for the specified requestor. The originator's account and amounts are not affected. If changing the requestor, a warning is displayed indicating that this action causes all accounts assigned to the items to be deleted. The accounts that the new requestor is authorized to use are charged with the item cost.
Requisition Nbr	The requisition number is populated when the requisition is saved if the **Use Automatic CYR Requisition Number Assignment** field is selected on the Finance > Tables > District Finance Options tab. Otherwise, you must enter a six-digit requisition number.
Date Request	Type the date of the requisition request. By default, the field is set to the current date; however, it can be changed.
Date Required	Type the date that the requisition is required. By default, the field is set to the current date; however, it can be changed.
Order For	Type the shipping contact name to be displayed on the purchase order. The field can be a maximum of 30 characters. If blank, the data from the **Requestor** field is displayed on the purchase order. **Note**: Data from the **Order For or Requestor** field is only displayed on the purchase order if a Y is entered in the **Include Requestor's Name in Shipping Address** parameter on the Print Purchase Orders or Reprint Purchase Orders report parameter page.

Field	Description
Requisition Per	The requisition period for this transaction is displayed. This field is the same as the accounting period and is set to the current or next period on the Finance > Tables > District Finance Options tab.
Shipping Addr	Type the address where the requisition is to be shipped. The shipping addresses are assigned on the District Administration > User Profiles > Purchasing Addresses tab.
Sort Key/Vendor Name	Type a valid vendor name, if known. The **Vendor Nbr** field is populated with the corresponding vendor number. If the vendor number is not known, click ⋮ to select a vendor from the Vendors Directory. The Vendor Directory is populated from the vendor records established on the Finance > Maintenance > Vendor Information > Vendor Name/Address tab.
Vendor Nbr	Populated with the vendor number based on the value entered in the **Sort Key/Vendor Name** field. Or, type a valid vendor number if known. The **Sort Key/Vendor Name** field is populated with the corresponding vendor name. If the vendor number is not known, click ⋮ to select a vendor from the Vendors Directory.
Reason	Type the reason for submitting the requisition or edit the current reason. The field can be a maximum of 30 characters. This information is displayed on various reports and on the general ledger.
Priority	Click ⌄ to select or change the requisition priority. By default, priority is set to *Regular*, but it can be changed to *Urgent*.
Reference Nbr	Type the identification number for this requisition. The field can be a maximum of 15 characters.
Work Order	Type a work order number. This field is only for informational purposes.
Bid Category	Type the category code to be used for the requisition. As you type the data, a drop-down list of corresponding data is displayed. Select a bid category code. Only category codes identified as a bid category on the Finance > Tables > Vendor Categories page and assigned to the selected vendor on the Finance > Maintenance > Vendor Information > Vendor Miscellaneous tab are displayed in the drop-down list.
Bid Nbr	If the bid process was used for this vendor and you are ordering based on a bid, type the bid number; otherwise, leave the field blank. This information is printed on the purchase order.
Confirm Only	Select if an order was sent via fax, email, or the Internet, and this purchase order only confirms that the order was already received by the vendor.
Attachments	Select if an attachment is included with the purchase order.
Freight Cost	Type a cost value, edit the current cost value, or leave the field blank if there are no charges. The freight cost is distributed to all line items when the **Freight Elig** field is selected. In addition, the **Freight %** field is populated based on the amount in the **Freight Amt** field divided by the subtotal of the line item.
Distr Freight Amt	Click to distribute the freight cost evenly among all line items in the requisition.

Field	Description
Credit Card Code	Type the credit card code to be used for the requisition. As you type the data, a drop-down list of corresponding data is displayed. Select a credit card code. Only active credit card codes that are assigned to the requestor on the District Administration > Maintenance > User Profiles > Purchasing Credit Cards tab are displayed in the drop-down list. After a requisition is submitted, only the originator can update the credit card code. The requisition must be returned to the originator to make any changes.
Campus/Dept	Type the name of the campus submitting the requisition. This field is also used to direct the requisition to the first approver. As you type the data, a drop-down list of corresponding data is displayed. Select a campus/department. **Notes**: This field is only displayed if the **Allow for Approval Process** is selected on the District Administration > Options > Purchasing/Warehouse tab. The **Campus/Dept** field is optional when the requisition is created and is required when the requisition is submitted. The **Campus/Dept** drop-down list includes the campus/department number, campus/department name, and the first approver.

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