# CREATING NEW FISCAL YEAR REQUISITION

# Create a SharePoint Requisition Request Form for FY16

#### **Requisition Request**

Click here for instructions.

Requestor:	Randy.Rusten@utsa.edu	Phone Number:	2104588198
User ID:	ohu239	Department:	PS SUPPORT & SUSTAINMENT C
		Creation Date:	7/24/2015

Description of Requisition:	*	Vendor Name:		
Quote #:	(User may attach a quote, if available.)	Attachment:	Iclick here to a	ttach a file
Budget Period	<ul> <li>This Fiscal Year (2014-2015)</li> <li>Next Fiscal Year (2015-2016)</li> </ul>	]		
Comme				
Commo	dity Description (if applicable)			
elect an propriate FY	dity Description (If applicable) ers/X-ray Equipment Fleet I or a description of each commodity listed at	Laboratory Animal(s)	Facility Ser	vices
elect an opropriate FY	dity Description (If applicable) ers/X-ray Equipment Fleet I or a description of each commodity listed at scription	Laboratory Animal(s)	Facility Ser	vices
elect an opropriate FY Item De # 0 Not to e	ers/X-ray Equipment Fleet L r a description of each commodity listed at scription Item Description	Laboratory Animal(s) bove	Facility Ser	vices Amount

When creating a SharePoint Requisition Request Form for FY16 purchase, end users must select "Next Fiscal Year (2015-2016)" radial button.

#### Create a Requisition

# Navigate to:

#### Main Menu > eProcurement > Create a Requisition

Navigate to create a requisition

\*\* Remember that end users still need to obtain budget approvals using the UTShare SharePoint Interim Requisition Request Form prior to creating a requisition in PeopleSoft.

Favorites Main Menu > ePro	curement > Create Re	quisition			
Employee Self-Service	myUTShare	Reporting			
Create Requisition					
1. Define Requisition	n 🔤	2. Add Items and Services	<u>3. R</u>	eview and Submit	
Specify requisition name, reques	ter, and other information	that applies to the entire requisition.			
Business Unit:	UTSA1 Q UTSA				
*Requester:	6001027824	C Vvette Medina	*Curr	ency: USD	
Requisition Name:	FY16-XXX	1	Prior	rity: Medium	•
Line Defaults 👔					
Continue					
	Clickerseete				
	set FY defaults	2			

End users should use some kind of identifier in the requisition naming to notate that the requisition is using new year funds.

- 1. Identify FY16 funds (example above –<u>ONLY</u> an example)
- 2. Next, end user must set some additional line defaults on the requisition specific to new FY orders.

*Note: these new line defaults are specific to new FY orders and should <u>only</u> be used for new FY orders placed <u>before</u> September 1<sup>st</sup>.* 

# Identifying a new FY Buyer

equisition Name:	FY16-XXX					Prio	rity:	Medium	
Line Defaults 🛛 👔									
efault Options 👔									
Default	If you select this op for these fields	otion, the default	s specified	below will be a	applied to requis	tion lines when the	ere are no pre	defined values	
Override	If you select this op assigned.	otion, the default	s specified n <b>"magnif</b> y	below will ove <mark>/ glass" to</mark>	rride any predefi	ned values for the	ese fields, only	non-blank values	are
endor:	Q	venc lookup	the Buye	r		Q			
Suyer:	¢	Category:				Q Unit of M	easure:		Q
hipping Defaults									
hip To: CR10104	4 Q			Modify	Onetime Addres	<u>s</u>			
ue Date:	31	Attention:							
Accounting Defaults						Personalize   Fin	<u>d   🛃   🔭 </u> F	irst 🗹 1 of 1 🖸 L	ast
Chartfields1 Details	Asset Information								
Pct Location	GL Unit	Account	Fund	Dept	Cost Centr	Function	Program	PC Bus Unit	Pi
CR10112	Q UTSA1 Q	٩	<b>Q</b>	٩	Q	٩	٩	٩	

End users will need to identify a buyer on each new FY requisition. Click on the lookup icon (magnify glass) to select a specific buyer for new FY requisitions.

Note: <u>DO NOT</u> select your assigned Central Purchasing Procurement Specialist ("Buyer"), assigning a buyer is <u>ONLY</u> for new FY orders placed <u>before</u> September 1<sup>st</sup>.

		Look Up Bu	ıyer	×
		1000907233	Nisha J Dass	
		1001034185	Scott Mumin Alisoglu	IIT SHA
		1001117879	Joseph S White	0100
Favorites   Main Menu > eProcurement > (	Create Requisition	1001120947	Samantha Scott	
* *		5000096689	Cindy C Troyer	
Employee Self-Service myUTSh	are Reporting	5000117624	O F Jones	
		5000117722	Glenda L Bennett	
		5000429128	Sue L Cross	
		6001016269	Amanda Alvarado	
Requisition Name: FY16-XXX		6001017563	Curtis Lane Brinson	dium -
I ine Defaults		6001019173	Elizabeth Raymond	
		6001020765	Julie Gohlke	
Default Options 😰		6001024711	Patricia A Burrier	
Default     If you select this opt	ion, the defaults specified below will	6001024788	Paul C Duke	ned values
for these fields		6001026210	Sandra Calderon	
R a 11	ion the defaulte energified below will	6001027824	Yvette Medina	black values are
• Override If you select this opt	ion, the delauits specified below will	6001029491	Maria C Cortez	- Diank values are
assigned.		6001030015	Viola Ramirez Puga	
Vendor:	Vendor Location:	6001030517	Kyle S Hayes	
		6001032799	Luis Almaguer	
Buver:	Category:	6001033618	Laura E Juarez	Q
	eutogerj.	6001033959	Maria Guadalupe Hernandez	
Shinning Defaults		6001034395	Ismael Chapa	
		6001038831	Mariano Alaniz	
Ship To: CR10104 Q	Mo	6001039209	Diana B Rodriguez	
Due Deter	Attention:	6001039650	Christopher G Palacios	
Due Date:		6001045049	Kelsi Morgan Gonzales	E
Accounting Defaults		6001045755	Robbie Davis	1 of 1 D Last
Chartfields1 Details Assot Information	(FEE)	6001115355	Ninja Taylor	
Details Asset Molimation		6001125331	Shauntelia Lashay Wilson	
Pct Location GL Unit	Account Fund Dept	6001126637	Charles Herman Blalock	Bus Unit Pr
	rund bopt	6001137750	Sheila Kay Darcey	
CR10112 0 UTSA1 0	0 0	6001139108	Rebecca A Overton	
Contonia de Colori de		6001139555	Sherri B Williams	
x		MMILLER-UTZ	(blank)	
		UTED BUYER	Buyer for the SeiQuest interfe	
	Select: UTSA-FY-Buyer	UTSA-FY-Buye	er generic buyer assignment ID	
Castieure				
Continue				

From the Buyer list, end user **MUST** select the **UTSA-FY-Buyer**.

Note: This ID is specific to UTSA and must <u>ONLY</u> to be used when creating new FY orders <u>before</u> September 1<sup>st</sup>.

Employee Self-Servic	myUTSł	hare Re	porting					
Create Requisition								
1. Define Requis	tion	2. A	dd Items	and Service	<u>es</u>	<u>3.</u>	Review and S	<u>Submit</u>
ecify requisition name, req	uester, and other in	nformation that a	applies to th	ne entire requi	isition.			
usiness Unit:	UTSA1 Q	UTSA						
equester:	6001027824			Q Yvette	Medina	*Cu	rrency:	USD
equisition Name:	FY16-XXX					Pri	ority:	Medium
Line Defaults 👔								
Default	f you select this op or these fields.	otion, the default	s specified	below will be	applied to requis	ition lines when t	there are no pre	edefined values
Default     Override     Vendor:     UTSA-FY	f you select this op or these fields. f you select this op issigned. Buyer	otion, the default otion, the default Vendor Loca Category:	ts specified	below will be below will ove	applied to requis erride any predef	ition lines when the ined values for the line of the l	there are no pre nese fields, only Measure:	edefined values y non-blank values
Default     Override     Vendor:     UTSA-FY Shipping Defaults	f you select this op or these fields. f you select this op issigned. Buyer	otion, the default otion, the default Vendor Loca Category:	ts specified ts specified ation:	below will be below will ove	applied to requis erride any predef	ition lines when t ined values for th Q Q Unit of M	there are no pre nese fields, only <b>Measure:</b>	edefined values y non-blank values
Default     Override     Vendor:     UTSA-FY Buyer:     UTSA-FY Shipping Defaults Ship To:     CR10104 Due Date:	f you select this op or these fields. f you select this op issigned. Buyer	otion, the default votion, the default Vendor Loca Category: Attention:	ts specified	below will be below will ove	applied to requis erride any predef Onetime Addres	ition lines when the ined values for the unit of M	there are no pre nese fields, only <b>Measure:</b>	edefined values y non-blank values
<ul> <li>Default</li> <li>Override</li> <li>Vendor:</li> <li>Buyer:</li> <li>UTSA-FY</li> <li>Shipping Defaults</li> <li>Ship To:</li> <li>CR10104</li> <li>Due Date:</li> <li>Accounting Defaults</li> </ul>	f you select this op or these fields. f you select this op issigned. Buyer	otion, the default otion, the default Vendor Loca Category: Attention:	ts specified	below will be below will ove	applied to requis erride any predef Onetime Addres	ition lines when the ined values for the line of the l	there are no pre nese fields, only Measure:	edefined values y non-blank values
Default     Override     Vendor:     UTSA-FY Buyer: UTSA-FY Shipping Defaults Ship To: CR10104 Due Date:     Accounting Defaults Chartfields1 Details	f you select this op or these fields. f you select this op issigned. Buyer Q Buyer Q Buser Asset Information	otion, the default otion, the default Vendor Loca Category: Attention:	ts specified	below will be below will ove <u>Modify</u>	applied to requiserride any predef	ition lines when the ined values for the line of the l	there are no pre nese fields, only Measure:	irst C 1 of 1 D L
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Default Override Vendor: Buyer: UTSA-FY Shipping Defaults Ship To: CR10104 Due Date: Accounting Defaults Chartfields1 Details Pet Location CR10112	f you select this op or these fields. f you select this op issigned. Buyer Q Buyer Q Buyer Q Buyer Q Buyer Q UTSA1 Q	otion, the default otion, the default Vendor Loca Category: Attention: Account	ts specified ts specified ttion: Fund	below will be below will ove <u>Modify</u>	applied to requiserride any predeferride	ition lines when the ined values for the ined	there are no pre nese fields, only Measure: Program	Irst C 1 of 1 D L PC Bus Unit

This is the end result after selecting the UTSA-FY-Buyer.

## Setting a shipping Due Date

Favorites Main Menu Procurement	t   Create Requisition						
Employee Self-Service m	yUTShare Reporting	g					
Create Requisition							
1. Define Requisition	E 2. Add Ite	ms and Services	3. Review an	d Submit			
Specify requisition name, requester, and	other information that applies t	to the entire requisition.					
Business Unit: UTSA	UTSA						
*Requester: 60010	027824	Q Yvette Medina	*Currency:	USD			
Requisition Name: FY16	- XXX		Priority:	Medium •			
Line Defaults							
Override     Override     If you select     these fields     if you select     assigned.	t this option, the defaults specif t this option, the defaults specif	ied below will be applied to requis	sition lines when there are no p fined values for these fields, on	redefined values for			
Vendor: Buyer: UTSA-FY-Buyer Shipping Defaults	<pre>     Vendor Locatic     Category: 1 </pre>		Q Unit of Measure:	Q			
Ship To: CR10104	Q Attention:	Modify Onetime Addre	ess				
Accounting Defaults       Accounting Defaults       Chartfields1     Details     Asset Inf       Pct     Location     GL Ur       CR10112     UTSA       Continue	September       2015         S       M       T       W       T       F         1       2       3       4         6       7       8       9       10       11         13       14       15       16       17       16         20       21       22       23       24       25         27       28       29       30	S 5 12 19 26 2	Personalize   Find   Program	First 1 of 1 Last PC Bus Unit P			

End users will also need to set the ship to due date of September 1<sup>st</sup> or later.

- 1. Click on the calendar icon next to the Due Date box.
- 2. Filter to September 1<sup>st</sup>, and select the date from the calendar.

*Note: All shipment must be received on or after September* 1<sup>st</sup>*. Any deliveries received prior to September* 1<sup>st</sup> <u>can</u> *result in a rejection of the shipment by Central Receiving.* 

Favorites Main Menu > ePri	ocurement 🤉 Create Re	quisition			
Employee Self-Service	myUTShare	Reporting			
					? Help
Create Requisition	1				Requ
1. Define Requisit	ion 📑	2. Add Items and Services	3. Review and	Submit	There Please
Specify requisition parts, requi	actor and other informatio	n that applies to the optice requisition			
Specify requisition name, requ	ester, and other iniormatio	ni mar applies to the entite requisition.			Total L
Business Unit:	UTSA1 Q UTSA				
'Requester:	6001027824	Q Yvette Medina	"Currency:	USD	
Requisition Name:	FY16 - XXX	Message			
Line Defaults					
Default Options					
Default	you select this option, th	warning date out of range. (15,9)			I
Override	you select this option, th	The date entered is either more than 30 days	in the past or 30 days in the futur	e. This is not normally true	e for this date. Either acknowledge that the date is OK, or correct the entered date.
a	ssigned.		. ,		
Vendor:	Q Ven	Click	on OK	ОК	
Buyer: UTSA-FY-E	Buyer Q Categ	jory:	Q Unit of Measure:	Q	
Shipping Defaults					
Ship To: CR10104	Q	Modify Onetime Addr	ress		
Due Date: 09/01/2015	B Atten	tion:			
Association Defaults				and I would be a	

Once the due date of September  $1^{st}$  or later is selected, end user will be prompted with a verification message. Click the **<u>OK</u>** button to acknowledge that the future date is correct.

### **Final Results**

Favorites Main Menu > eProcurement >	Create Requisition					
Employee Self-Service myUTS	nare Reporting					
Create Requisition						
1. Define Requisition	2. Add Items and S	ervices	3. Review and S	ubmit		
Specify requisition name, requester, and other	nformation that applies to the enti	re requisition.				
Business Unit: UTSA1	UTSA					
*Requester: 6001027824	QY	vette Medina	*Currency:	USD		
Requisition Name: FY16 - XXX		1	Priority:	Medium -		
Line Defaults (2)						
Default Options 😰						
Default     If you select this of     for those fields	tion, the defaults specified below	will be applied to requisition	lines when there are no pre	defined values		
Override     If you select this of assigned.	ption, the defaults specified below	will override any predefined	I values for these fields, only	non-blank values are		
Vendor:	Vendor Location:	Q				
Buver: UTSA-FY-Buver	Category: 7		Unit of Measure:	Q		
Shipping Defaults	Ζ					
Ship To: CR10104		Modify Onetime Address				
Due Date: 09/01/2015	-Attention: 3					
Accounting Defaults		Pe	ersonalize   Find   2	ret 1 at 1 D Last		
Chartfields1 Details Asset Information						
Pct Location GL Unit	Account Fund Dept	Cost Centr Fu	Inction Program	PC Bus Unit P		
CR10112 Q UTSA1 Q		Q	Q	Q [		
< [	m .			•		
Continue						

End users should have the following set for new FY requisition.

- 1. FY16 identifier in their requisition name
- 2. "UTSA-FY-Buyer" set as the buyer for the new FY requisition
- 3. September 1<sup>st</sup> or later shipping due date

Once these defaults are set, complete the requisition as usual, save and submit the approved requisition for sourcing to a PO.