

CREATING NEW FISCAL YEAR REQUISITION

Create a SharePoint Requisition Request Form for FY16

Requisition Request

Click here for instructions.

Requestor:	<input type="text" value="Randy.Rusten@utsa.edu"/>	Phone Number:	<input type="text" value="2104588198"/>
User ID:	<input type="text" value="ohu239"/>	Department:	<input type="text" value="PS SUPPORT & SUSTAINMENT C..."/>
		Creation Date:	<input type="text" value="7/24/2015"/>

Vendor Information

Description of Requisition:	<input type="text"/>	Vendor Name:	<input type="text"/>
Quote #:	<input type="text"/>	Attachment:	<input type="button" value="Click here to attach a file"/>
<i>(User may attach a quote, if available.)</i>			
Budget Period:	<input type="radio"/> This Fiscal Year (2014-2015) <input type="radio"/> Next Fiscal Year (2015-2016)		

Commodity Description (if applicable)

<input type="checkbox"/> Copiers/X-ray Equipment	<input type="checkbox"/> Fleet	<input type="checkbox"/> Laboratory Animal(s)	<input type="checkbox"/> Facility Services
Provide a description of each commodity listed above			

Item Description

#	Item Description	Amount
0	Not to exceed freight cost	<input type="text"/>
1	<input type="text"/>	<input type="text"/>

Total:

Note: User must itemize out each line item described on quote. If there is no freight cost identified on the quote, please contact the vendor for an estimated "not to exceed" cost. If the total cost of the order, including freight, exceeds \$5,000, the order will need to be reviewed by Purchasing.

Select an appropriate FY

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 > eProcurement > Create Requisition

Employee Self-Service | myUTShare | Reporting

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit:

*Requester: *Currency:

Requisition Name: **1**

Priority:

Line Defaults

2 Click arrow to set FY defaults

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 –**ONLY** 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 only be used for new FY orders placed before September 1st.

Identifying a new FY Buyer

Favorites | Main Menu > eProcurement > Create Requisition

Employee Self-Service | myUTShare | Reporting

Requisition Name: Priority:

Line Defaults ?

Default Options ?

- Default: If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
- Override: If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Vendor:

Buyer:

Category: Unit of Measure:

Shipping Defaults

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

Accounting Defaults Personalize | Find | First 1 of 1 Last

Chartfields 1 | Details | Asset Information

Pct	Location	GL Unit	Account	Fund	Dept	Cost Centr	Function	Program	PC Bus Unit	Pr
<input type="text"/>	<input type="text" value="CR10112"/>	<input type="text" value="UTSA1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Continue

Click on "magnify glass" to lookup the Buyer

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

Look Up Buyer

1000907233	Nisha J Dass
1001034185	Scott Mumin Alisoglu
1001117879	Joseph S White
1001120947	Samantha Scott
5000096689	Cindy C Troyer
5000117624	O F Jones
5000117722	Glenda L Bennett
5000429128	Sue L Cross
6001016269	Amanda Alvarado
6001017563	Curtis Lane Brinson
6001019173	Elizabeth Raymond
6001020765	Julie Gohlke
6001024711	Patricia A Burrier
6001024788	Paul C Duke
6001026210	Sandra Calderon
6001027824	Yvette Medina
6001029491	Maria C Cortez
6001030015	Viola Ramirez Puga
6001030517	Kyle S Hayes
6001032799	Luis Almaguer
6001033618	Laura E Juarez
6001033959	Maria Guadalupe Hernandez
6001034395	Ismael Chapa
6001038831	Mariano Alaniz
6001039209	Diana B Rodriguez
6001039650	Christopher G Palacios
6001045049	Kelsi Morgan Gonzales
6001045755	Robbie Davis
6001115355	Ninja Taylor
6001125331	Shauntelia Lashay Wilson
6001126637	Charles Herman Blalock
6001137750	Sheila Kay Darcey
6001139108	Rebecca A Overton
6001139555	Sherri B Williams
MMILLER-UTZ	(blank)
UTSA-FY-Buyer	generic buyer assignment ID

Select: UTSA-FY-Buyer

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

Note: This ID is specific to UTSA and must **ONLY** to be used when creating new FY orders **before** September 1st.

[Favorites](#) | [Main Menu](#) > [eProcurement](#) > [Create Requisition](#)

[Employee Self-Service](#) | [myUTShare](#) | [Reporting](#)

Create Requisition

1. Define Requisition |
 [2. Add Items and Services](#) |
 [3. Review and Submit](#)

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: UTSA

***Requester:** Yvette Medina

***Currency:**

Requisition Name:

Priority:

Line Defaults

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Vendor:

Vendor Location:

Buyer:

Category:

Unit of Measure:

Shipping Defaults

Ship To: [Modify Onetime Address](#)

Due Date:

Attention:

Accounting Defaults Personalize | Find | First 1 of 1 Last

Pct	Location	GL Unit	Account	Fund	Dept	Cost Centr	Function	Program	PC Bus Unit	P
<input type="text"/>	<input type="text" value="CR10112"/>	<input type="text" value="UTSA1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Setting a shipping Due Date

Favorites | Main Menu > eProcurement > Create Requisition

Employee Self-Service | myUTShare | Reporting

Create Requisition

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Business Unit: UTSA

*Requester: Yvette Medina *Currency:

Requisition Name: Priority:

Line Defaults

Default Options

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Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Vendor: Vendor Location:

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

Accounting Defaults

Pct	Location	GL Un
<input type="text"/>	<input type="text" value="CR10112"/>	<input type="text" value="UTSA"/>

Continue

September 2015

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Current Date

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

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

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

Favorites | Main Menu > eProcurement > Create Requisition

Employee Self-Service | myUTShare | Reporting

Create Requisition

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Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: UTSA

*Requester: Yvette Medina *Currency:

Requisition Name:

Line Defaults ?

Default Options ?

Default If you select this option, the system will use these fields.

Override If you select this option, the system will use the fields assigned to you.

Vendor: Ven

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

Accounting Defaults

Message

Warning -- date out of range. (15,9)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

Click on OK →

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

Final Results

Favorites Main Menu > eProcurement > Create Requisition

Employee Self-Service myUTShare Reporting

Create Requisition

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Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: UTSA

*Requester: Yvette Medina

*Currency:

Requisition Name: Priority:

1

Line Defaults

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Vendor: Vendor Location:

Buyer: Category:

2

Shipping Defaults

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

3

Accounting Defaults

Chartfields1 Details Asset Information

Pct	Location	GL Unit	Account	Fund	Dept	Cost Centr	Function	Program	PC Bus Unit	P
<input type="text"/>	<input type="text" value="CR10112"/>	<input type="text" value="UTSA1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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 1st 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.