Create a Requisition

Standard Goods and Services Checklist

I. When selecting a supplier, consider the University’s preferred suppliers:
   A. U Market
   B. University of Minnesota’s Internal Service Organizations and Auxiliaries
   C. U-Wide contracts at http://uwidecontracts.umn.edu
   D. Targeted suppliers and small businesses owned by women, minorities, and persons with
disabilities at http://purchasing.umn.edu

II. According to the type of supplier and dollar amount, complete any required forms or processes
in accordance to University policy.
   A. If using a U-Wide contract supplier:
      1. Requisition may total up to $249,999 without going through the formal bidding
         process.
      2. If requisition totals $1 million or greater, the Board of Regents must approve. This is
         an offline process. Contact Purchasing Services for assistance.
   B. If using a non U-Wide Contract supplier:
      1. Requisitions totaling $10,000-$49,999 must complete the Price Comparison form.
      2. Requisitions totaling $50,000 or greater must go through the bidding process.
         Contact Purchasing Services for assistance.

III. Verify the supplier’s data is correct and current.
   A. Home > Suppliers > Supplier Information > Add/Update > UM Review Suppliers
      1. Enter the name of the supplier in the Name field.
         a. The search capability is very powerful. Search on a singular field such as Name,
            Address, State ID Number, or use a combination of search criteria.
      2. Click <Find>.
      3. Review the search results.
         a. If the supplier cannot be found, the supplier must be set up. Refer to the
            “Request a New Supplier or Change an Existing Supplier” section in the Create
            Requisitions reference manual.
      4. Identify the correct supplier and click on the supplier detail icon.
      5. Verify the supplier information is accurate, then click <Return>.

IV. Create a Requisition: eProcurement > Requisition
   A. Add Items and Services: Determine the process
      1. Using the U Market - Apple (Punch-Out) option:
         a. Click on one of the suppliers: Apple or U Market.
         b. Search for specific item(s) on the supplier’s website.
         c. Click <Add to Cart> for each item.
Standard Goods and Services Checklist (cont.)

d. Click <Proceed to Checkout> when finished adding all items.
e. Click <Return Cart to EFS>.
f. Refer to the “B. Checkout – Review and Submit page” section of this checklist.

2. Using the Standard Purchase option:
   a. Description: (e.g., Robe, Sanctus style, maroon)
   b. Price (per item)
   c. Unit of Measurement (e.g., “ea.” or “ton”)
   d. Quantity (number of items to be ordered)
   e. Category (ensure the proper category is selected as it drives reporting and the account ChartField value. Also, if a capital asset, will assign the asset profile.)
   f. Supplier ID
   g. Click <Add to Cart> for each item.
   h. Click <Checkout> when finished adding all items.
   i. Refer to the “B. Checkout – Review and Submit page” section of this checklist.

3. Using the Favorites option:
   a. Do not use on any items from the web/punch out sites.
   b. Specific items that are frequently ordered can be saved.
   c. Click on <Favorites>.
   d. Click on checkbox next to item you want to order.
   e. Click on <Add> on bottom of screen.
   f. Click <Checkout> on top of screen.
   g. Refer to the “B. Checkout – Review and Submit page” section of this checklist.

4. Using the Template option:
   a. Do not use on any items from the web/punch out sites.
   b. A group of items that are frequently ordered.
   c. Click on <Templates>.
   d. Fill in quantity of item you want to order.
   e. Click on <Add>.
   f. Click <Checkout> on top of screen.
   g. Refer to the “B. Checkout – Review and Submit page” section of this checklist.

5. Using the Other Purchases – Blanket Order option. Enter the following required fields:
   a. Description: (e.g., bottles of water, white copy paper, tissue)
   b. Quantity (always 1)
   c. Unit of Measure
d. **Price** (total amount of the line)

e. **Category** (Ensure the proper category is selected as it drives reporting and the account ChartField value. Capital assets may not be purchased on a blanket order.)

f. **Supplier ID**

g. Click <Add to Cart> for each item.

h. Click <Checkout> when finished adding all items.

B. **Checkout – Review and Submit** page (for all requisition types)

1. **Requisition Summary section**
   a. **Requisition Name** (titles the requisition)
   b. **Start and End Dates** - Use with blanket orders only.

2. **Cart Summary section** (for all requisition types) - Verify and/or complete the following information for each requisition line:
   a. **Ship To** - Enter P + DeptID (e.g., P10980) and then click the look up icon. Select the appropriate delivery location.
   b. **ChartField values**
      i. To view/edit an individual line: Click <Expand Row>.
      ii. Enter ChartField information.

3. **Shipping Summary section**
   a. **Requisition Comments and Attachments** field - Comments put in this field are called “header” comments and are printed on the purchase order. Information about discounts, shipping, freight, and deliveries pertaining to whole order should go in this field.
   b. **<Add more Comments or Attachments>** link should be used to add attachments, if applicable. For example:
      i. Price Comparison form: for all non-U-Wide Contracts $10,000-$49,999.
      ii. Exception to Regents Purchasing Policy form: if $50,000 or greater and sole vendor.
      iii. **Approval Justification** field - In accordance with the Justification Standards policy, provide the justification for requisition in this field. Include 5Ws.

V. After all data has been entered and verified, click <Save and Submit>.