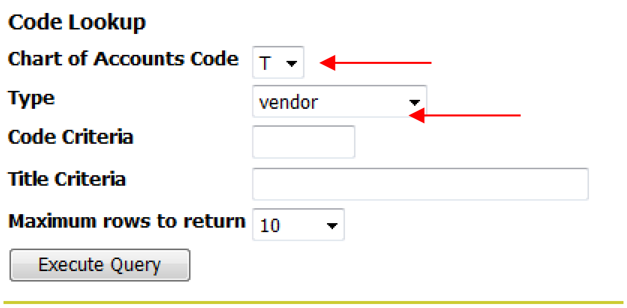
Creating a Requisition to Add Funds to Existing Purchase Order

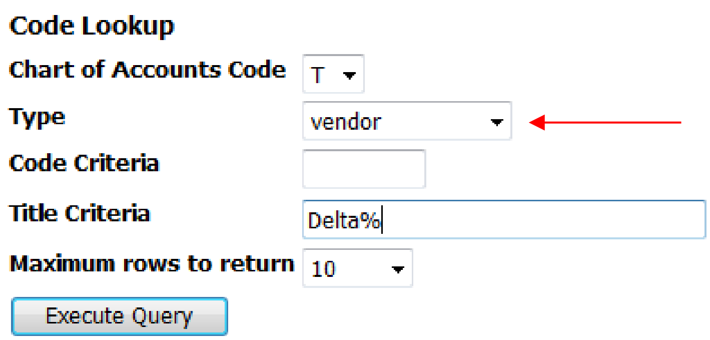
Creating a Requisition

1. Click Requisition
2. Chart of Accounts Code (should always remain at "T")
3. Select vendor from the drop down menu titled Type

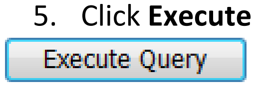


4. Enter the vendor information in the **Title Criteria** box (for alpha search), use **Code** for numerical
   search. *All vendor ID's will start with the letter 'R'.*

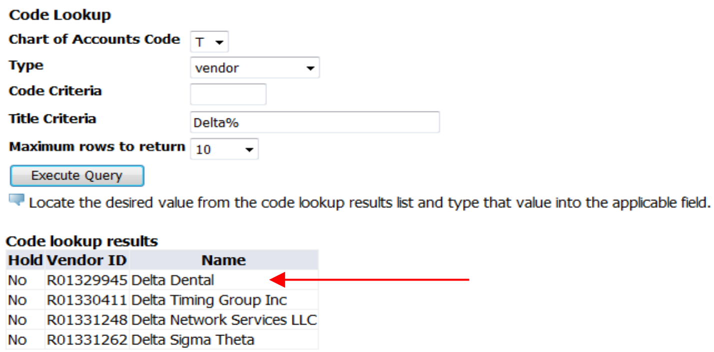
   Note: Percent (%) signs can be used as wild cards for searching.



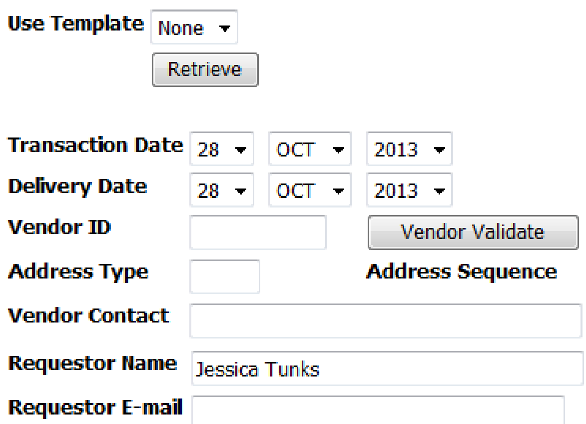
5. Click **Execute Query** to display vendor results.



6 A list of the vendor results will be displayed.

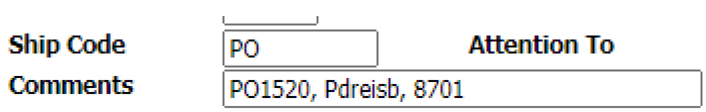


7. Enter or Copy/Paste the Vendor ID into the **Vendor ID** field.
8. Transaction Date = Today's Date
9. Update the Delivery Date



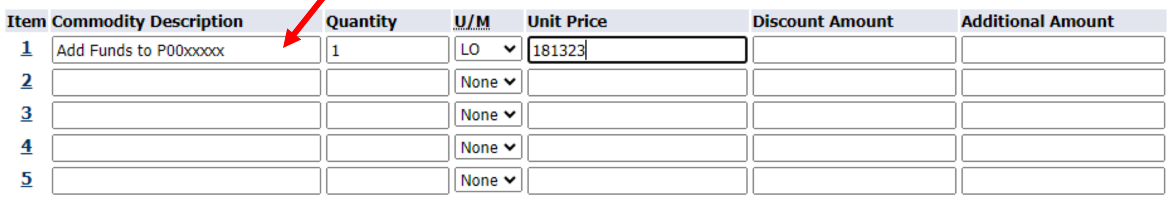
NOTE: Validation Buttons – there are several 'validation' buttons on this entry page. It is recommended you fill out all fields of information and use the VALIDATE button at bottom of form to limit the amount of scrolling needed to complete the request.

10. The **Ship Code** will default to you building. In the **Comments** field include building code abbreviation, room number, first initial/last name, and phone extension.



11. **Document Text** – use this to enter information regarding quotes, vendor contact information, sourcing needs, etc…

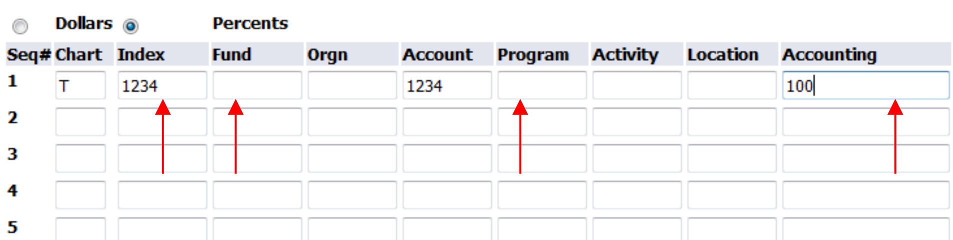
12. Enter "Add Funds to P00xxxxx. This will be the PO number that has been created with additional years to hold it open. Then UOM will be LO. Unit Price is the total amount for the Fiscal Year.



Item	Commodity Description	Quantity	U/M	Unit Price	Discount Amount	Additional Amount
1	Add Funds to P00xxxxx	1	LO	181323		
2			None			
3			None			
4			None			
5			None			

13. Enter the **Accounting information**.

Chart – Chart should always be T
Index – Enter the appropriate index
Account – Enter the appropriate account
Accounting – Enter the appropriate value based on dollars or percents.
Note: All percents must be equal to 100%. All dollar amounts must equal the total of all line items.

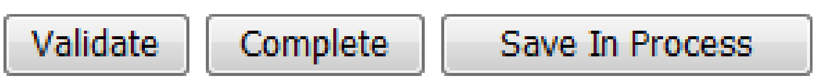


Dollars Percents

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1	T	1234			1234				100
2									
3									
4									
5									

14. Click **Complete.**

Note: You can click Validate to take a final look at the requisition. The system will automatically validate the requisition after clicking complete.



Save as Template: You may name a template for repeat use (saves key strokes if ordering items is frequent)
Shared check box: checking this box allows template to be shared with other users.