Creating a Noncatalog (Regular) Requisition (NEW)

Overview

In this scenario, you will create a regular requisition and submit it for approval.

Procedure

1. Click Purchase Requisitions.

2. Click Purchasing news to display **Create Noncatalog Request** button.

3. Click **Create Noncatalog Request**.

4. Click into the Item Description field to enter your item's description.

5. Enter the **Item Description**.
   For this example, enter "Laptop".

6. Select the **Item Type** that matches how your Supplier will invoice for this purchase.
   Click to open the list.

7. Valid selections for UMB are:
   - Goods billed by **Quantity** (Example: receive 5 widgets)
   - Services billed by **Amount** (Example: receive $3,300.41)
   In this example click to select **Goods billed by Quantity**.

8. Click into the **Category** field.

9. Begin keying in the **Category**, IT Purchases < $5000.
   Enter "IT Pu".

10. Click to select the IT Purchases < $5000 **Category**.

11. Edit the **Quantity** if needed.
    In this example Quantity does not need to be edited.

12. The **Tab** key also moves you quickly from field to field. Choose either click or Tab as you work.
    Press "**Tab**".

13. Enter the appropriate Unit of Measure (**UOM**).
    In this example, enter "**ea"**.

14. Press "Tab".

15. In the **Price** field, enter the item's unit price in US Dollars.
    In this example you will enter "3,785.13".

16. Press "Tab" once to reach the **Currency** option.
    US Dollars (USD) are the only valid option in Quantum Financials. Continue.

17. Pressing "Tab" once takes you to the **New Supplier** checkbox.
    In this example you do not need to complete information for a new **Supplier**. Continue.

18. Press "Tab" a second time to reach the **Supplier** dropdown.

19. Begin keying in the **Supplier** name.
    In this example you will enter "**data networks**".

20. Click the appropriate option to select your **Supplier** name.

21. Click the **Supplier Site** dropdown to display available sites.

22. Click to select the appropriate **Supplier Site**.

23. After adding any attachments or notes to Buyer, click **Add to Cart**.

24. To add another item (another Line), click **Create another request**.
    In this example, you are purchasing only one item. **Click View Cart (1)** to complete your requisition.

25. With the Cart open, click the truck symbol, **Edit Delivery and Billing Details**.

26. Edit **Distribution** for this Line.
    Click the **Actions** (3 dots).

27. Click Edit.

28. Click the **Enter charge account number** option to enter a SOAPF.

29. Click **Search for combination**.

30. Here you can select using the Segments you know by clicking on the Segment name, entering the desired value, and selecting it from the options presented.
    Click **Object**.

31. Click **Search for combination** to enter the **Object**.

32. Enter the **Object** value.
    In this example, enter "**3953**".

33. Click to select **3953 - Non-Capital Assets**.

34. Click **Source**.

35. Click **Search by value or description**.

36. Enter the **Source** value.
    In this example enter "**105**".

37. Click to select **105 – General Appropriation**.

38. Click **Org**.

39. Click **Search by value or description**.

40. Enter the **Org** value.
    In this example enter "**06402000**".

41. Click to select **06402000 - Business Applications**.

42. Click on the appropriate row to select the SOAPF you need.

43. Click **Apply** to add this SOAPF selection to your requisition.

44. Click **Update** to finalize the **Distribution**.

45. Click **Update** to finalize your **Requisition Line Details**.

46. Move over to the **Requisition Summary** section to add a **Description** for the requisition.
    Click the **Edit** symbol (pencil).

47. Click into the **Description** field.

48. Enter the requisition's purpose in the **Description** field.
    In this example, enter "**Replacement Laptop (replacement cycle)**".

49. Click **Update**.
    Note: If needed, you can also add **Attachments** further down the Requisition Summary page.

50. After proofing your requisition, you are ready to send it for review and approval.
    Click **Submit**.

51. You have completed creating and submitting a requisition.