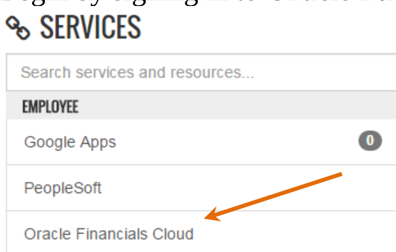
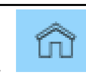
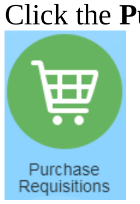
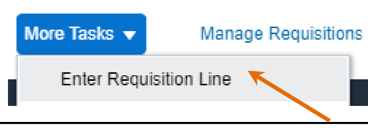
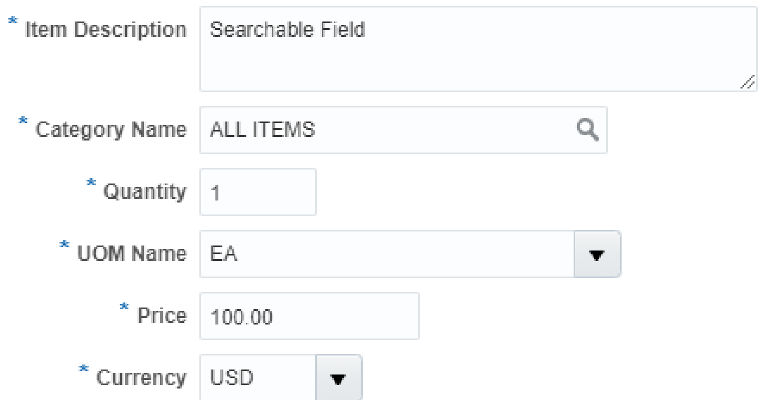
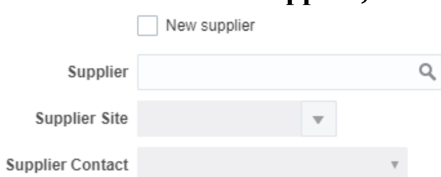
BOISE STATE UNIVERSITY

Creating and Submitting a Standard Requisition

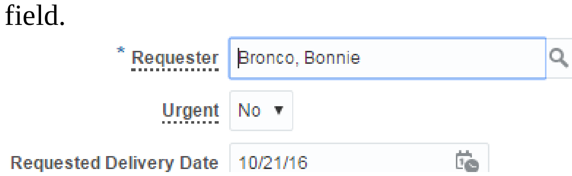
Purpose: The Purchasing Department receives requests generated by users for products and services that require a Purchase Order. These requests usually consist of quotes, estimated costs and may require a bidding process. Generally included in these requests are purchases greater than $2999, software renewal, and service contract renewal.

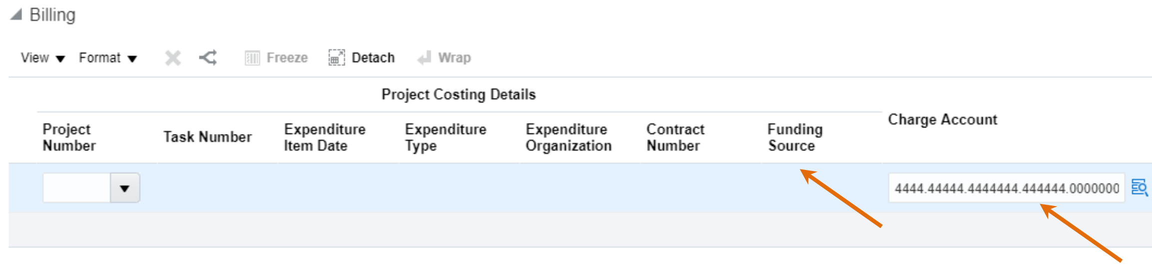
Step	Action
1.	Begin by signing in to **Oracle Fusion Cloud (OFC)** from myBoiseState.edu. 
2.	To access the **Home Page** in OFC, click the house icon at the top of the screen. 
3.	Click the **Purchase Requisitions** icon on the homepage to access the **OFC Procurement** module. 
4.	Click **More Tasks** and select **Enter Requisition Line** in the upper right hand corner. 
5.	Select **Goods or services** from the **Line Type** dropdown. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6.</td><td>Enter Item Description. This field is searchable.
Enter ALL ITEMS into the Category Name field.
Enter Quantity, UOM, and Price.


Protip! If UOM (Unit of Measure) is unknown, enter EA or Each in the UOM drop down.</td></tr>
<tr><td>7.</td><td>Enter the name of the Supplier, if known.


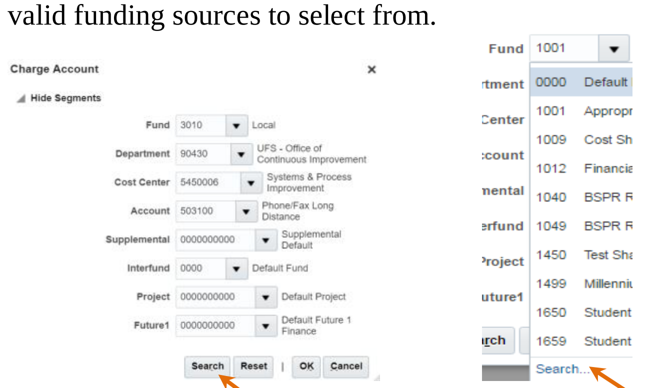
Note: If the Supplier name is not recognized, click the New supplier check box and input required data. Ensure that the search field is blank prior to entry. Email the Substitute W-9 Form to apsuppliers@boisestate.edu.</td></tr>
<tr><td>8.</td><td>Requester: Defaults to the name of the Enterer. The Requester drives the Approval Workflow. This field can be modified as needed.

Urgent may be updated to Yes for rushed requests. Include details in Notes to Buyer.
The date in the Requested Delivery Date field is auto-populated, but may be updated by clicking in the field.

</td></tr>
</table>

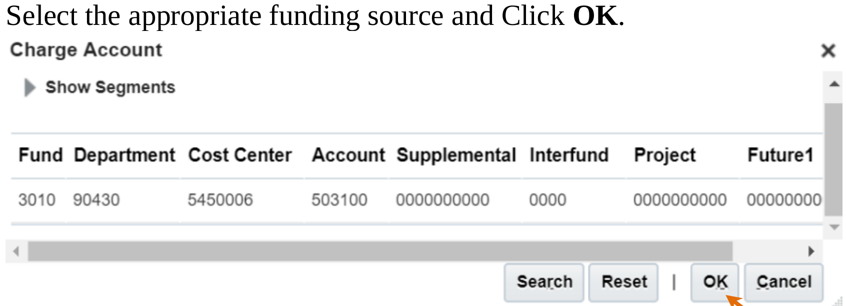
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9.</td><td>If the Requisition will be billed to a non-Project funding source, code the transaction on the right side of the Billing distribution lines, using one of three ways.


Select a Funding Source that was entered as a Favorite Funding Source in your user preferences.

<u>OR</u> Enter the segment string in the Charge Account. (Include all 8 segments separated by .)</td></tr>
<tr><td>10.</td><td><u>OR</u> Search for and select segments using the search option.

Click the Reset button to clear all values, Enter known Segment values, and Select Search for valid funding sources to select from.


Note: You may click the arrow next to each segment to pull up a search by segment.

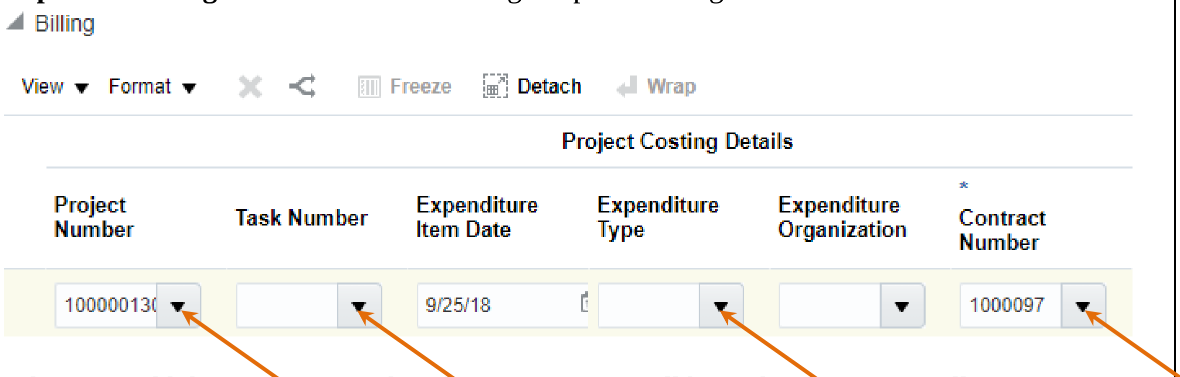
Select the appropriate funding source and Click OK.


ProTip! Download the Expanded Expense Account Code List from the Administrative Accounting website to improve accuracy and save time when entering expense codes in OFC.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11.</td><td>

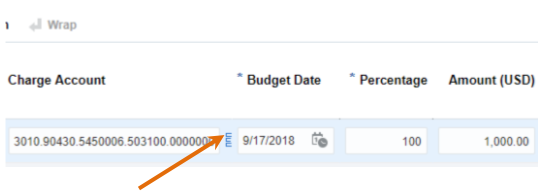
Important: Project Funded Requisitions only, skip to step 12 for non-project funded requisitions.

If the Requisition will be billed to a Project funding source, use POET to code the transaction in the left side of the Billing distribution lines.
Project Number: Enter the 10 digit Project segment.
Task Number: Enter 100001 for all services and non-asset goods and 100002 for tagable asset goods.
Expenditure Type: Enter the 6 digit account segment.
Expenditure Organization: Enter the 5 digit department segment.



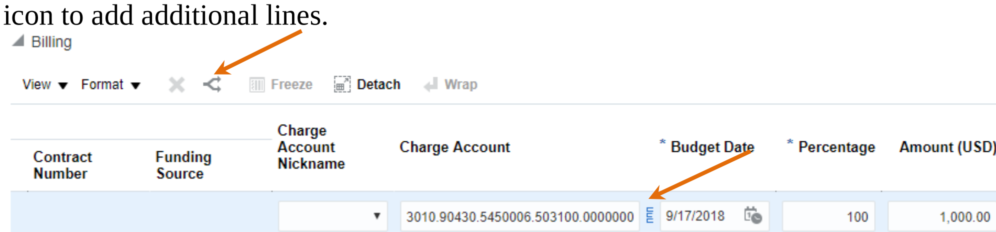
When you add this to your Cart the **Charge Account** will be updated automatically.
</td></tr>
<tr><td>12.</td><td>

Enter **Budget Date**.

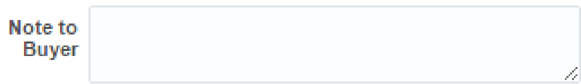
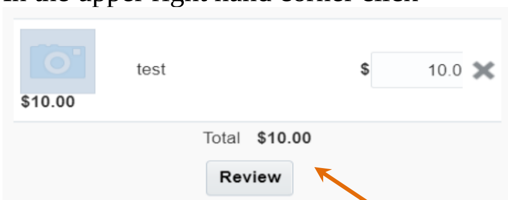
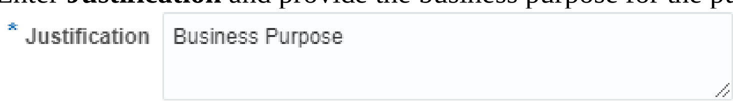
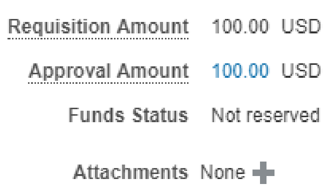


Note: For project expenses, this should match the Expenditure Item Date.
</td></tr>
<tr><td>13.</td><td>

Update the billing distribution, if applicable, by changing the **Amount** and Selecting the **Split** icon to add additional lines.



Note: Each line will be calculated based on the entry.
</td></tr>
</table>

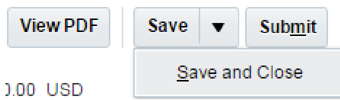
Step	Action
14.	Include a **Note to Buyer** to communicate information to Purchasing, such as Special Handling Instructions.  **Note:** This field is limited to 240 characters.
15.	Select Add to Cart ***Note***: You may add additional lines by completing steps 5 through 14 for **Requisition Lines** on the left side of the screen, not to exceed 60 lines.
16.	In the upper right hand corner click 1 and **Review**. 
17.	Enter **Justification** and provide the business purpose for the purchase. 
18.	Click the icon under **Attachments** to upload additional attachments to the **Requisition Header**. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>19.</td><td>

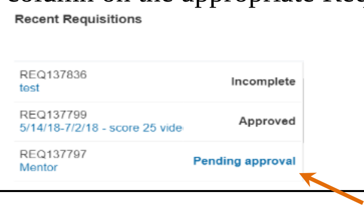
Click **Save and Close** to edit and submit at a later time.

Click **Submit** to submit the requisition into the standard approval workflow.

Click **View PDF** to view the requisition.



ProTip! To review the Approval Workflow status, click Pending Approval link under the Status column on the appropriate Requisitions to view.



</td></tr>
<tr><td>20.</td><td>Once the item is received and the invoice is ready to be paid, follow the Ready to Pay procedure outlined on the Accounts Payable website.</td></tr>
<tr><td>21.</td><td>End of Procedure.</td></tr>
</table>