OFFICE OF THE COMPTROLLER
Illinois State University

Table of Contents

Purpose

The purpose of this document is to outline the Requisition Submission Process for the end user

This document assumes the user has:

- Knowledge of University Requisition policies and process
- Access to the intake form site

Submitting a Requisition

- Go to My Requisitions Dashboard
- Under *My Requisitions Dashboards,* select *click this link*
- Under *Requisition Information,* enter the following information:
    - *Requisition Number*
    - *Requisition Amount* (enter the number exactly as it appears in Colleague)
    - *Fiscal Year* (this field will default to the current Fiscal Year - adjust this if necessary)
    - *Term of services (full life of agreement)*
    - *Federal Grant?*
    - *Shipping?*
    - *Software?*
        - Any and all software (including $0) requires submission via the intake process
    - *Split Requisition?*
    - *Needed by*
        - This is the date the PO is needed, not the actual item/service received
        - If you select a date that is less than 7 days in the future, enter your justification in the box that appears below
- Under *Vendor Information,* enter the following:
    - *Vendor* (select from the dropdown)
        - If your vendor does not appear in the dropdown, enter the name in the *Vendor* field
    - *Contact Name*
        - If your contact does not appear in the dropdown, enter the name in the *Contact Name* field
    - *Contact Email*

- Contact Phone
- *Is the Vendor BEP or VBP?*

- Under *Supporting Documentation,* attach the appropriate documentation (at least one attachment is required i.e., quotes, proposals, contracts)
  - Add any notes in the *Comments* section, if necessary
- Under *Authorization:*
  - Enter your Department
  - Enter the Budget Officer
  - Select the box certifying
    - Your understanding of the University requisition requirements
    - Your authority to submit the requisition
- Click *Submit*

Submitting a Contract

- Go to [My Requisitions Dashboard]
- Under *My Requisitions Dashboard,* select *click this link*
- Under *Requisition/Contract Intake Form,* select the box indicating you are submitting a contract
- Under *Contract Information,* enter the following information:
  - *Contract Amount*
  - *Contract Term*
  - *Fiscal Year* (this field will default to the current Fiscal Year - adjust this if necessary)
  - *Federal Grant?*
  - *Software?*
    - Any and all software (including $0) requires submission via the intake process
  - *Needed by*
    - This is the date the PO is needed, not the actual item/service received
    - If you select a date that is less than 7 days in the future, enter your justification in the box that appears below
- Under *Vendor Information,* enter the following:
  - *Vendor* (select from the dropdown)
    - If your vendor does not appear in the dropdown, enter the name in the *Vendor* field
  - *Contact Name*
    - If your contact does not appear in the dropdown, enter the name in the *Contact Name* field
  - *Contact Email*
  - *Contact Phone*

  - *Product Description*

- Under *Supporting Documentation,* attach the appropriate documentation (at least one attachment is required i.e., quotes, proposals, contracts)
  - Add any notes in the *Comments* section, if necessary

Under *Authorization:*
  - Enter your Department
  - Enter the Budget Officer
  - Select the box certifying:
    - Your understanding of the University requisition requirements
    - Your authority to submit the contract
- Click *Submit*

Approving the Requisition/Contract

- The Budget Officer will receive an email informing there is a requisition or contract requiring their approval
- Go to My Requisitions Dashboard
- Under *Pending My Approval*
- Click on the *Edit* symbol next to the request
- Review the information
- Make any necessary changes
- Select the box certifying:
  - You reviewed the contract/requisition
  - Your understanding of the University requisition requirements
  - Your authority to approve the contract/requisition
- Click *Submit*
- **NOTE: Your certification here replaces your need to approve the contract/requisition in Colleague.**

Return to Table of Contents