Table of Contents

Purpose .................................................................................................................. 2
Submitting a Requisition ....................................................................................... 2
Submitting a Contract .......................................................................................... 3
Approving the Requisition/Contract ................................................................. 4
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 Datatel/Colleague)
  - Fiscal Year (this field will default to the current Fiscal Year – adjust this if necessary)
  - Term
  - Federal Grant?
  - Shipping?
  - Split Requisition?
  - Needed by
    - 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?
Requisition Submission Process
Revised 5/21/19
Author: Josh Kuehl

- Under *Supporting Documentation*, attach the appropriate documentation (at least one attachment is required)
  - 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?*
  - *Needed by*
    - 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)
  - Add any notes in the *Comments* section if necessary
Requisition Submission Process

Revised 5/21/19
Author: Josh Kuehl

• Under Authorization:
  o Enter your Department
  o Enter the Budget Officer
  o 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:
  o You reviewed the contract/requisition
  o Your understanding of the University requisition requirements
  o Your authority to approve the contract/requisition

• Click Submit
• NOTE: Your certification here replaces your need to approve the contract/requisition in Datatel