Requisition Submission Process

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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?*

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- 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

- 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 Datatel**