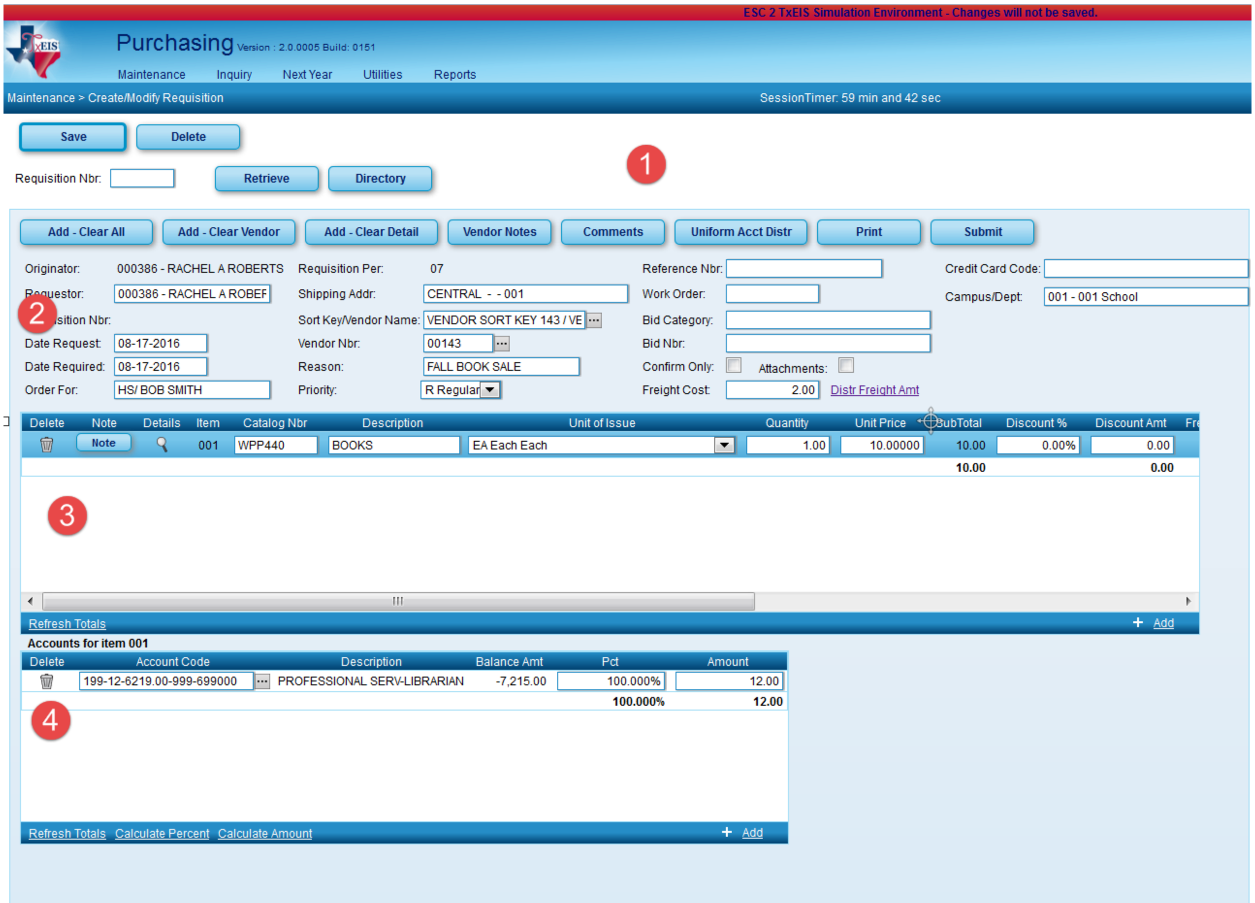
TxEIS – Steps to Create a Requistion. In the purchasing application, chose Maintenance>Create/Modify Requisition.



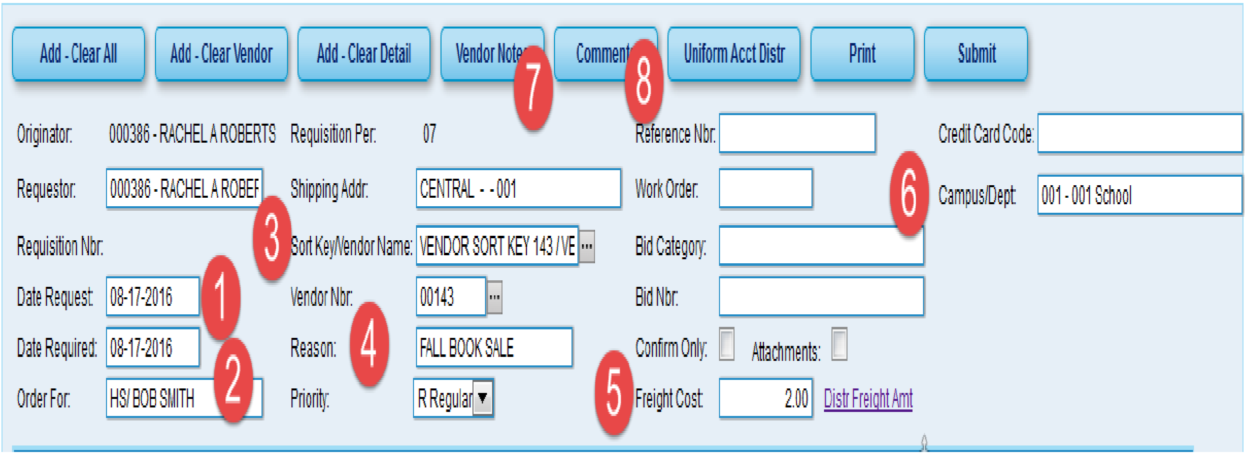
1	UPPER SECTION OF CREATE MODIFY REQUISITION SCREEN	CLICK ADD-CLEAR ALL TO BEGIN NEW REQUISITION. RETRIEVE EXISTING REQUISITION BY KEYING REQUISITION NUMBER AND CLICKING RETRIEVE, OR SELECT FROM DIRECTORY. SAVE REQUISITION FOR LATER EDITING.
2	SUMMARY INFORMATION FOR CURRENT REQUISITION	DATE REQUIRED, ORDER FOR, VENDOR SELECTION. SHIPPING ADDRESS AND CAMPUS/DEPT ARE REQUIRED.
3	ITEM DETAIL	A REQUISITION CAN HAVE ONE OR MORE ITEMS AS DENOTED BY THE ITEM NUMBER. SCROLL RIGHT TO SEE FREIGHT AND ADD A LONG DESCRIPTION. CLICK ADD BUTTON IN BOTTOM RIGHT TO ADD MORE LINE ITEMS. USE SPYGLASS TO SHIFT FOCUS TO A DIFFERENT ITEM WHEN ENTERING MULTIPLE ITEMS.
4	ACCOUNT DISTRIBUTION	EACH ITEM MUST BE DISTRIBUTED 100% TO 1 OR MORE GENERAL LEDGER ACCOUNT CODES. ORIGINATOR ACCOUNT CODES ARE LIMITED TO THOSE AUTHORIZED IN USER PROFILE.

Click Save and Submit – once all information on Requisition is correct, click the Submit button to send to the approval path. Once submitted the Originator will no longer be able to view or modify the requisition unless it is returned by an approver. Use the Inquiry menu to view Requisition Status.

SECTION 1 - RETRIEVAL AREA TO CONTINUE WOR KING ON SAVED OR RETURNED REQUISITION

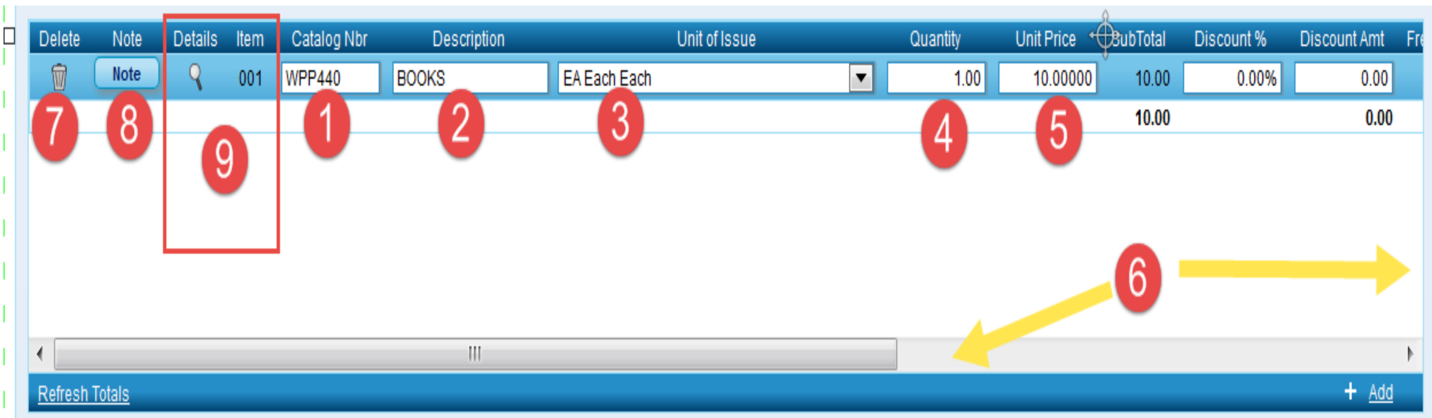
1	Requistion Nbr:	Key in a requisition number (if known) to retrieve a saved or returned item. Note: Once submitted and in the approval path the requisition cannot be retrieved by the originator.
2	Retrieve button	Click retrieve to bring up requisition number if entered.
3	Directory	Search the directory to display list of saved or returned requisitions.
4	Save	Use the Save Button to save a requisition for further editing and later submission
5	Delete	Delete the requisition currently displayed on the screen.

Section 2 – Requisition Information (Click ADD- Clear All) to get started!)



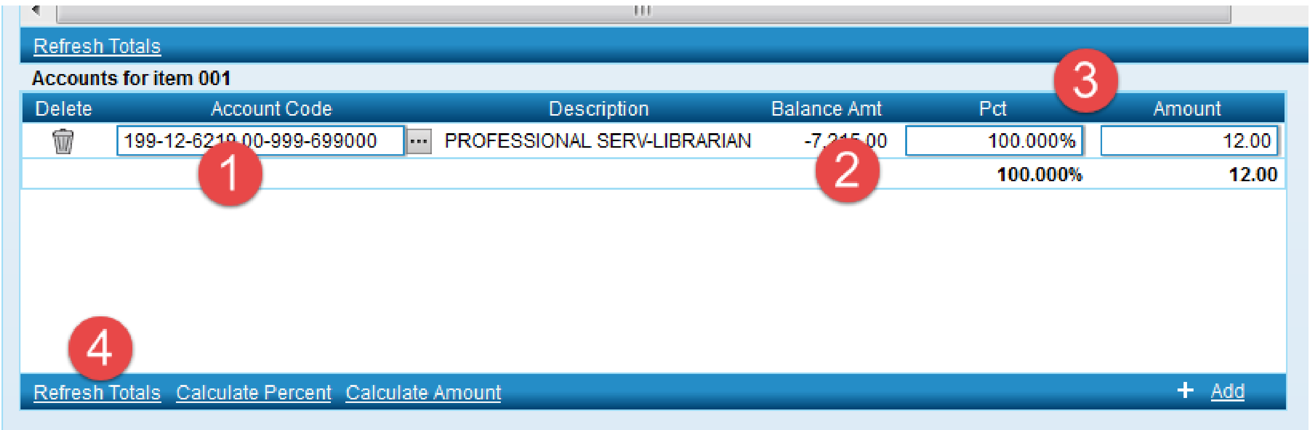
1	Date Request	Date Required on PO. This lets the vendor know when the item will be delivered. Edit as needed.
2	Order For	Campus Abbrev / Name of person the item was ordered for. This will assist in tracking PO and routing goods when received.
3	Sort Key/Vendor Name	Select vendor in multiple ways. Key in first letter of vendor name, open gray ellipsis box and search, or key vendor number. Required.
4	Reason	Key in the purpose of the purchase.
5	Freight Cost	Enter freight or delivery charges if known and as directed by the business office.
6	Campus/Dept	Verify that this field is populated. The individual assigned to this campus/dept will be the First Approver of the requisition.
7	Vendor Note	A vendor note is an instruction to the vendor that will appear on the purchase order. A paperclip icon appears on the button when text is present.
8	Comment	Enter comments as needed and directed by the business office. A paperclip icon appears on the button when text is present.

Section 3 - Item information



1	Catalog Nbr	Enter vendor catalog number or item number if available. Otherwise, leave blank. Tab or use the mouse to advance to the next field.
2	Description	Enter a short description for the item on this line. Tab or use the mouse to advance to the next field.Note that a longer description is available on the far right of this section (see item 6).
3	Unit of Issue	Tap the letter "E" for each, or use the dropdown to select other units of issue.
4	Quantity	Enter the quantity for the item being purchased. Note that the quantity will be multiplied by the unit price to get a total. Tab or use the mouse to advance to the next field.
5	Unit Price	Enter the price per item. Note that the quantity will be multiplied by the unit price to get a total. Tab or use the mouse to advance to the next field.
6	Scroll Right	Use scroll bar to move to right to add long description and view freight.
7	Trash Can	To mark an item for deletion, click Trash Can. Item will turn red and will be deleted on next save. Click the Trash Can a second time to unmark the item prior to saving.
8	Item Note	Item note button. Click to add or view item note. Look for paper clip icon to indicate if notes are present.
9	Spyglass	Click spyglass to move to other items when more than one item is included on requisition.

Section 4 – Account Codes. Each item must be distributed 100% across one or more GL Account Codes.



1	Account Code	Begin typing the account code. Accounts in profile will begin to appear. Optionally, use gray ellipsis box and search for code.
2	Balance Amt	A negative sign in the balance means funds are available. A positive, zero, or any negative amount that is not equal to the amount of the line item means funds are not available.
3	Pct and Amount	The bold amount and percent for any item must total to 100% and equal the total amount for the item.
4	Refresh Totals Calculate Percent Calculate Amount	Refresh or calculate amounts if bolded numbers do not total to what is entered on individual line items. If percent is entered, calculate the amount, and if amounts are entered, calculate percent.

Submit – once all information on Requisition is correct, click the Submit button to send to the approval path. Once submitted the Originator will no longer be able to view or modify the requisition unless it is returned by an approver. Use the Inquiry menu to view Requisition Status.