

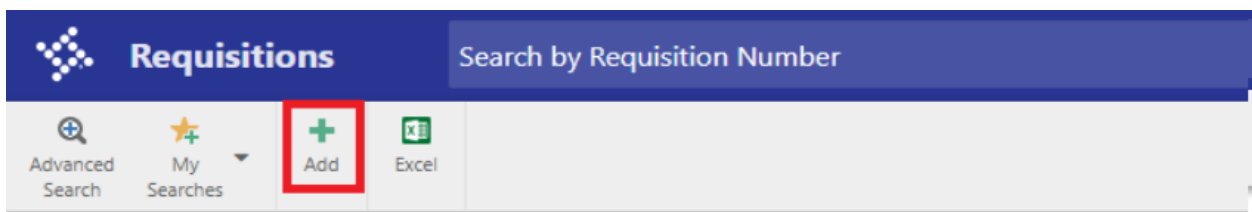


## Adding Requisitions in 2018.1

1. Go to “Requisitions”. Menu path Munis > Financials > Purchasing > Purchase Order Processing > Requisitions. The screen will look like this and be mostly blank.



2. In order to add a requisition, click “Add”.



- Now you will fill out the information for this requisition. Complete all needed fields for this page then click “Add Item” to go to the next screen to add in the line item and expense account.

**Requisitions**

Requisition: 2020/20000000  
Created: Adam Rohrabough, 07/23/2019

Total Cost: \$0.00

**Requisition**

Vendor Quotes (0) General Notes (0)

Fiscal Year\* 2020 Requisition Number\* 20000000 Created Date\* 07/23/2019

Department\* (TECHN) TECHNOLOGY

Commodity

Description test requisition

Buyer

Type (N) NORMAL

Purchase order

Review

Needed by 08/01/2019

PO Expiration

Project Accounts Applied

Notify Originator When Converted or Rejected

Notify Originator of Overages

Receive by Amount

Three Way Match Required

Inspection Required

by

**Items (0)**

**Add Item**

No requisition items exist.

- Add in all the line item information. Note how at the top under the requisition number it shows the status of “created”. Once item information is added, click “Add allocation” to pick the expense account.

**Requisitions**

Requisition: 2020/20000000  
Created: Adam Rohrabough, 07/23/2019

Total Cost: \$47.50

**Item Details**

Add Item Delete Item Notes (0) Line 1 -

Item

Contract

Commodity

Pick Ticket  Purchase

Description\* Item description

Vendor (1013) SOLARWINDS, IN

7171 SOUTHWEST PARKWAY  
BUILDING 400  
AUSTIN, TX 78735

Ship to\* (EAST V) CONNECT

CONNECT  
5700 WEST CANAL RD.  
VALLEY VIEW, OH 44125

E-mail DIANE.KOSKI@CHCONNECT.ORG

Quantity 1.00

Unit Price \$47.50000 Unit of Measure EACH

Discount Percent 0.00

Freight Amount \$0.00

Credit Amount \$0.00

Line Item Total \$47.50

**Allocations (0)**

**Add Allocation** Allocation Codes

No allocations exist.

**Optional Details**

Save Save and Add Item Cancel

- Then click “Enter GL account...”

DIANE.KOSKI@OHCONNECT.ORG

Allocations (1)  
Allocation Codes Remove All

Delete	Project String	PS budget code	GL Account	GL Budget code	Percent	Amount	
X	Enter project string...		Enter GL account...		100.000	\$47.50	
<b>Totals:</b>						<b>100.000</b>	<b>\$47.50</b>

6. Enter the GL expense account. **NOTE: Be careful when entering the account! If you enter the account segments too fast and tab through it, the system will use the current highlighted segment when you hit tab even if you typed something else. Double check the entire expense account before moving on!**

Requisition: 2020/20000000  
Created: Adam Rohrabough, 07/23/2019

Total Cost: \$47.50

Contract	(1013) SOLARWINDS, IN	Unit Price	1.00
Commodity	7171 SOUTHWEST PARKWAY BUILDING 400 AUSTIN, TX 78735	Unit of Measure	EACH
Ship to*	(EAST Y) CONNECT	Discount Percent	0.00
Description*	CONNECT 3700 WEST CANAL RD. VALLEY VIEW, OH 44125	Freight Amount	\$0.00
E-mail	DIANE.KOSKI@OHCONNECT.ORG	Credit Amount	\$0.00
		Line Item Total	\$47.50

Allocations (1)  
Allocation Codes Remove All

Delete	Project String	PS budget code	GL Account	GL Budget code	Percent	Amount	
X	Enter project string...		025-052960-410-0000-0000000-000-00-0000 FISCAL FEES		100.000	\$47.50	
<b>Totals:</b>						<b>100.000</b>	<b>\$47.50</b>

Save Save and Add Item Cancel

7. Once you have verified the account is correct, click "Save" in the bottom right corner. The status after will change to "Allocated".

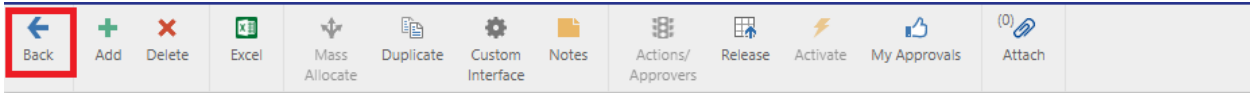
Save Save and Add Item Cancel

# Requisition: 2020/20000000

Allocated, Adam Rohrabough, 07/23/2019

## Item Details

8. Hit "Back" to take you out of the item detail screen.



# Requisition: 2020/20000000

Allocated, Adam Rohrabough, 07/23/2019

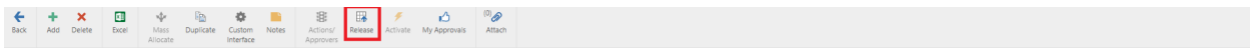
## Item Details

[Add Item](#) [Delete Item](#) [Notes \(0\)](#) [Line 1](#) ▾

Item

Vendor

9. Verify all information is correct for this requisition. When you are ready, you can click "Release" to put this requisition into workflow for approval.



Requisition: 2020/20000000

Allocated, Adam Rohrabough, 07/23/2019

Total Cost: \$47.50

### Requisition

Vendor Quotes (0) General Notes (0)

Fiscal Year\* 2020 Requisition Number\* 20000000 Created Date\* 07/23/2019

Department\* (TECHN) TECHNOLOGY [View](#)

Commodity [View](#)

Description test requisition

Buyer

Type (N) NORMAL

Purchase order

Review

Needed by 08/01/2019

PO Expiration

Project Accounts Applied

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Receive by Amount

Three Way Match Required

Inspection Required

by

### Items (1)

[Add Item](#)

Delete	Line	Description	Qty	UOM	Unit Price	Line Total	Project String	GL Account
	1	Item description	1.00	EACH	\$47.50000	\$47.50		E (025-052960-419-0000-000000-000-00-000-) OTHER PROFESSIONAL & TECHNICAL