PeopleSoft Purchasing
Advice of Change
College Requisition (CR) or
Subcontract Requisition (SC)
### Purchasing Overview

Purchase Orders/Change Orders are generated from on-line requisitions. The Origin Field will indicate the type of Requisition being processed. Departments will be able to process an on-line requisition resulting in one of the following documents:

- College Requisition (CR)
- Internal Vendor Purchase Order (IV)
- Limited Value Purchase Order (LV)
- Subcontract Purchase Order (SC)

**A (CR) College Requisition is processed when the purchase is:**
1. In excess of $5,000;
2. Blanket Orders (External Suppliers and Internal Vendors);
3. Commodities and/or Services that are prohibited on a Limited Value Purchase Order (see section 2.16 of the URI Purchasing Manual);
4. Change Order (Advice of Change) to a PO issued as a result of a prior CR. Note: Change Orders cannot be processed to a LVPO or IV.

**A (LV) Limited Value Requisition is processed when:**
1. The purchase is $5,000 or less (inclusive of all costs; i.e. shipping and handling);
2. The commodity and/or service is an allowable purchase on a LVPO (see section 2.16 of the URI Purchasing Manual);
3. The purchase is a one-time delivery, one-time payment situation;
4. The purchase is within the current fiscal year only.

**A (IV) Internal Vendor Requisition is processed when:**
1. The purchase is from a URI Internal Vendor and is a one-time delivery, one-time payment situation (see section 2.12 of the URI Purchasing Manual).

**A (SC) Subcontract Requisition is processed when:**
1. URI intends to issue a new subcontract agreement to a subrecipient to perform part of the statement of work in a URI sponsored research project;
2. An amendment is required to modify an existing Subcontract Agreement. The following are some examples of when an amendment should be issued to modify an agreement:
   - Changes to the Subrecipient’s budget (i.e. the addition/reduction of funds or re-budgeting that requires sponsor approval).
   - Changes to the subcontract agreement’s period of performance.

Changes to the subcontract agreement’s terms & conditions, or the subrecipient PI or senior personnel named in the Notice of Award. NOTE: These changes are considered to be administrative and do not require a purchase order to be issued.

For additional information on Subcontract Purchase Orders please visit the Office of Sponsored Projects Review at: [https://web.uri.edu/research-admin/submit-a-proposal/subcontract-requisition-po-internal-processes/](https://web.uri.edu/research-admin/submit-a-proposal/subcontract-requisition-po-internal-processes/).
Requisition Workflow Terminology

1) **Approval Levels** with associated **Roles**:
   - i) Pre-Approval - (Requester Role)
   - ii) Level 1 – (Signatory from Signature Authorization)
   - iii) Level 2 – (Final Review from Signature Authorization)
   - iv) Level 3 – (Administrative Approvals i.e. Grant/Research and Foundation.)

2) **Approver** – User who Approves Requisition or Chartfield String (CFS).

3) **Category Code** – Used to categorize the item that is being purchased. Users should select the Category Code that most closely matches the item(s) they are purchasing. The Account Code is defaulted based on the Category selected.

4) **Denied Requisition** – Requisition that is sent back to Requester for correction or cancellation.

5) **Final Review** – 2nd Level Approver for the CFS – (Optional Approval Level)

6) **Hold from Further Processing Checkbox** – When checked: the Requisition is on hold; when unchecked: the Requisition is available for processing.

7) **Origin** – Type of Requisition indicates to the system and users how the Requisition is processed. The two-letter alpha code should be used for Requisitions. The Origins are listed below:
   - i) CR – College Requisition - Routed to Purchasing for completion.
   - ii) IV – Internal Vendor Requisition - Purchase Order auto generated directly from Req.
   - iii) LV – Limited Value Requisition - Purchase Order auto generated directly from Req.
   - iv) SC – Subcontract Requisition - Routed to the Research Office for completion.

8) **Originator** – A user who enters a Requisition but does not have Pre-Approval authority.

9) **Pre-Approval Process** – Requisition is entered by an Originator who must have a Requester Approve the Req. The Requester Pre-Approves the Req by clicking the Green Pre-Approve Check which changes the status from Open to Pending to facilitate workflow processing.

10) **Requester** – User who has been granted the authority to Pre-Approve Req. The Requester will be the primary contact for Requisitions and/or Purchase Orders.

11) **Routing** – The process of electronically moving work.

12) **Ship To Location** – Address where the item’s final delivery is shipped.

13) **Ship To Control** – Determines where the shipped item is first sent.

14) **Ship To Comments** - Field used to Add the Attn: (Person’s Name) to whom the item will be sent.

15) **Workflow** – Paperless On-Line work routing system.

16) **Worklist** – Approvers work queue, where users manage/review Requisition(s).
Components of a Requisition

This Manual explains how to enter each component of a Requisition, and how they relate to each other.

In PeopleSoft, Requisitions consist of five components:

1. **Requisition Header** – This includes the Requester name, Requisition date, Origin, Accounting Date and Header Comments.

2. **Requisition Defaults** – Where general information pertaining to the entire Requisition is entered. This includes data such as the Suppliers, Category (*if all Line Items are of the same Category), Ship To Location and Due Date.

3. **Lines** – Where the Description, Quantity, Unit Of Measure (UOM), Category and Price for each item you are ordering.

4. **Schedule** – Where the Ship To Address, Unit Price and Due Date are stored for each Item on the Requisition.

5. **Distribution** – Where accounting information (i.e. Chartfield String) is entered. The Chartfield String includes the Account, Fund, Department, Program, Project, Activity and Budget Date.
Logging Into Peoplesoft

PeopleSoft is to be used in accordance with the URI Access and Compliance Data Confidentiality Statement.

The Data Confidentiality Statement can be found here:

http://web.uri.edu/ecampus/hr/data-security/

Log into PeopleSoft using your e-Campus UserID and Password here:

https://appfsprod.uri.edu:9301/psp/fsprod/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&
To Add a New Requisition

From the Main Menu, choose Purchasing:

Then choose Requisitions:

Then choose Add/Update Requisitions:

To add a new Requisition, Click:

The Requisition ID (Requisition number) will auto generate the next number once the Requisition has been saved.

All text should be entered in upper/lower case.
**Requisition Header**

- Requester - defaults based on your logon;
- Requisition Date - defaults to the current date;
- Origin defaults to KNG - Change to: CR = College Requisition (or change to SC if you are processing a change to a Subcontract);
- Click the search and Select CR;

Then Click on the [Requisition Defaults](#) Hyperlink:

It is **IMPORTANT** that you access the Requisition Defaults page and enter the following fields prior to entering any information on the lines which will be discussed later.

**PLEASE NOTE:** ANY INFORMATION ENTERED IN THIS SCREEN WILL POPULATE TO ALL LINES.
Requisition Defaults

**Buyer** – Leave Blank;
**Unit of Measure** – Leave Blank;

**Supplier** – Select the Supplier by clicking on the **Supplier Lookup** hyperlink. If you do not have a suggested supplier, go to **Entering the Category on Page 11**.

**NOTE**: Select the same Supplier as on the original Purchase Order.
Type the Supplier name or a portion of the Supplier name. If the Supplier is an individual, type the last name first. Click [Search]

Select the Supplier from the Search Results by typing a check (v) on the box at the beginning of the line. If there are multiple locations, select the “MAIN” Location.

**Note:** If there are multiple locations beginning with MAIN, preview the address for each and select the appropriate “MAIN” location.

Click [OK]

Once selected, the Supplier Number and Location will populate onto the screen.
Choose a Category

Category – Use the same Category that was used for the PO that is being changed. The Category will populate the Account; i.e. Category 406A = Account 5406.

Note: Only one Category can be used per Line Item.
- If you are Requisitioning multiple Items with the same Category, you may select the Category here.
- Otherwise, if you are Requisitioning multiple Items with multiple Categories, do not enter a Category Code here.
- Instead, you will need to enter the Category Codes on each Line Item on the main Requisition screen. For more information, see page 15.

Please note: All CRs utilizing Category Code 669A (Account Code 9669) for Components>$5K with Fabrication numbers require that a FAB number is entered on the Distribution page. See page 22 for instructions on how to enter FAB number.
In those rare instances where goods/services are not being delivered to the University, type “offsite” in the Ship to field and click . Select OFFSITE. The following message will appear:

By selecting the Offsite ShipTo location, your requisition will automatically be flagged for audit.

The complete Ship To address will need to be entered as a Comment in the Requisition Header Comments section and is described on page 30.
If the Due Date is 30 days in the past or 30 days in the future, the following message will appear:

**Message**

Warning – date out of range. (15.9)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

**Click OK.**

You will be returned to the Maintain Requisitions page.

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**Due Date**

If the Due Date is changing, enter the new Due Date; otherwise, type or click the [ ] and select the same date as on the PO.

If you are processing an Advice of Change to a multi-year Blanket Purchase Order, enter the Due Date for the Line that you are changing.

**Distribute By**

“Distribute By” defaults to “Amount” – DO NOT CHANGE

**Distributions**

DO NOT enter the Distribution(s) here. When processing an Advice of Change, the Distribution(s) will be entered on the line. **See page 19.**

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**Requisition Defaults**

**Business Unit** URIPS

**Due Date**

Enter the Due Date for the Line that you are changing.

**Distribute By**

Under “Distribute By,” select “Amount.”

**Distributions**

DO NOT enter the Distribution(s) here. The Distribution(s) will be entered on the line. **See page 19.**

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If you are processing an Advice of Change to a multi-year Blanket Purchase Order, enter the Due Date for the Line that you are changing.

**Click OK when done.**

You will be returned to the Maintain Requisitions page.
All Advice of Change Orders require a detailed breakdown of the reason(s) for the change.

Depending on the circumstances, the reason may be included in the Line Description (see above), as a Line Comment (see page 28) or as an Attachment (see page 34).
When increasing or decreasing a dollar amount on a Blanket PO, the Quantity will typically be 1. However, if you are processing a change to increase a quantity, enter the actual quantity. If you are decreasing the quantity enter 1 and indicate in the Description the actual quantity decrease.

**UOM**
The UOM on changes to a Blanket PO or a decrease to a Standard PO will typically be TOT. Otherwise, enter the appropriate UOM or click to select.

**Category**
Note the Category has populated from the Requisition Defaults. **DO NOT CHANGE UNLESS** you did not enter the Category Code in Requisition Defaults.
**Price Notes:**

- When “increasing” a Purchase Order, enter the actual dollar amount of the increase.
- When “decreasing” a Purchase Order, enter an amount of $1.00 (DO NOT ENTER A NEGATIVE AMOUNT; DO NOT ENTER 0).
- When “changing” a Date, only enter an amount of 1.
- When “transferring” funds from one Chartfield String to another Chartfield String, type the first Line with the amount that is being reduced in the Description and the Amount of $1.00; then type a second Line with the amount that is being increased in the Description and the actual dollar amount that is being transferred in the Amount.
  - MOST IMPORTANT: Make sure that the ChartField Strings are correct for each line – the CFS that is being reduced should be on the first line and the CFS being increased should be on the second line. See the example below:

### Example of Transferring funds between CFS:

<table>
<thead>
<tr>
<th>Period</th>
<th>Line-Sch-Dist</th>
<th>Accounts</th>
<th>Project</th>
<th>Activity</th>
<th>Amount</th>
<th>FAB</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2019</td>
<td>1-1-1</td>
<td>9655-100-4055-0000</td>
<td></td>
<td></td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>FY2019</td>
<td>2-1-1</td>
<td>9655-110-4061-0000</td>
<td></td>
<td></td>
<td>5,000.00</td>
<td></td>
</tr>
</tbody>
</table>

**Make sure the ChartField Strings are correct for each line.**

In this example:

1. $5,000 is being removed from CFS #9655-100-4055-000 on line one with an amount of $1.00
2. $5,000 is being added to CFS #9655-110-4061-0000 on line two with an amount of $5,000
When the default Ship To Control is accepted, the Ship To address that will print on the Purchase Order will include URI, Central Receiving, Kingston, RI. 02881.

- To Change the default Ship to Control, click .
- See the next page for instructions on how to change the Ship To Address.
Change the Ship To Address

Select “D” for Direct Delivery to the Department (Non-Central Receiving)
The address will read: University of Rhode Island, Department name and physical address. For example:

```
Ship To: University of Rhode Island
        Facilities Services, Business Office
        60 Toottell Rd., Sherman Bldg. 2nd Floor
        Kingston RI 02881
```

Select “G” for GSO Central Receiving:
The address will read: URI GSO Central Receiving, Narragansett, RI 02882-1197, followed by the Department name and address. For example:

```
Ship To: URI GSO Central Receiving
        Narragansett, RI 02882-1197
        Ocean Engineering
        215 So. Ferry Rd., 110 Sheets Bldg.
```

Select “K” for URI Central Receiving:
The address will read: URI Central Receiving, Kingston, RI 02881, followed by the Department name and address. For example:

```
Ship To: URI Central Receiving
        Kingston, RI 02881
        CMB CBLS
        120 Flagg Rd., Room 098
```

Notes: * If delivery is to be made to the Alton Jones Campus or FCCE, select “D” for Direct Delivery.
* This action only needs to be performed on Line 1/Schedule 1.

If you have selected a Ship To of “OFFSITE”, change the Ship To Control to “D”.
* You will type the complete Ship To address in a Header Comment.
* If you have chosen an OFFSITE Ship To location do not access the Add Ship To Comments.
* “SEE BELOW” will print in the Ship To area on the printed PO:

```
Ship To: SEE BELOW
```

If you have selected a Ship To of “OFFSITE”, change the Ship To Control to “D”.
* You will type the complete Ship To address in a Header Comment.
* If you have chosen an OFFSITE Ship To location do not access the Add Ship To Comments.
* “SEE BELOW” will print in the Ship To area on the printed PO:

```
Ship To: SEE BELOW
```
When processing an Advice of Change, **DO NOT** enter a Ship To Comment.

### Entering Distributions on the Line

Click on the **Distribution** tab on the Schedule page:
When Distributing by more than one ChartField String, Click  to add the desired number of rows:

Enter the desired number of rows. For example, if the purchase is being charged to 2 ChartField Strings, click  to add 1 row.

Initially, the Category Account Number that was chosen on the Requisition Defaults page will populate the Account Number to the first Distribution line. When more lines are added, the same Category Account Number will populate in the Account field.  **DO NOT CHANGE THE ACCOUNT #**
If you are done entering all of the ChartField Strings and Lines in Distributions and DO NOT need to enter a Fabrication number (FAB number – using Category Code 669A for Components >$5K),

Click **OK** to return to the Schedule page and continue on page 24.

If you need to add an additional Account Code to this Purchase Order, it MUST BE ON A NEW LINE.

PeopleSoft/Accounting allows ONE ACCOUNT CODE PER LINE on any Requisition.

Make a new Line by following the instructions on Page 26.

DO NOT ENTER any Category Codes in Defaults if there is more than one on the Requisition.

If you are using Category Code 669A, you must enter a Fabrication number (FAB number – using Category Code 669A for Components >$5K) on the Distribution page following the instructions below:
Entering Fabrication Numbers for Research Projects

All College Requisitions utilizing Category Code 669A (Account Code 9669) for Components >$5K with Fabrication (FAB) numbers will now require that the FAB number is entered into PeopleSoft.

The FAB number will then print on both the Requisition and the Purchase Order in the area where the ChartField String prints. This will eliminate the need for Departments to have to add a comment to the Requisition and for the need to ensure that the number is also printed on the PO.

When utilizing Category Code 669A, you will need to enter the FAB number in the Distribution Page for each Line Item that is using this Category Code.

On the Distribution Page, Click on the Tab to access the Fab number Field.

If you have not entered the FAB number and proceed to Save the Requisition, you will get the following message reminding you to do so:

Go back and enter the FAB number(s).
Once the Requisition is saved, the FAB Number will print on the Requisition in the Distribution section of the CR.

Once a PO is issued, the FAB number(s) will print near the PO Type on the bottom of the PO.
Click the hyperlink: Return to Main Page:

This will return you to the Maintain Requisitions page:

When all lines are complete, Click: Save

To add additional Line Items, see page 26.
Click Save when done.
A Requisition ID has been assigned. The Requisition ID is for internal use only and is located in the upper left-hand of the screen. (This is not the Purchase Order Number)

Most Advice of changes will be one line item, however, if there are additional lines click to add the desired number of rows and follow the same procedures as above for entering line information including the distribution(s).

Once all of the Lines have been added, Header Comments and/or Attachments may be added by clicking on the hyperlink.
To Add Additional Line Items

If you need to add any additional Line Items, Click [Symbol]:

Enter the desired number of rows (lines) to add.
For example: if the Requisition is for a total of 3 lines, enter 2.

Click OK.
Two blank lines will be added to the PO.
Note: The Category will automatically populate from the Requisition Defaults page once you have entered a Description, DO NOT CHANGE.

- If the Chartfield String(s) Distribution was entered on the Requisition Defaults page it will automatically populate on each line.
- If the Chartfield String(s) Distribution was not entered in the Requisition Defaults it will need to be entered on each Line as described above including the Budget Date, if necessary.

If there are no more items to add click Save

You will receive the following message:

Click OK
Adding Line Comments

The Line Comment is a space to further explain and/or give details that only apply to that Line. To add a Line Comment, choose the line you would like the Comment to be associated with by Clicking on the talk bubble icon on that line.

Once in the Line Comments section, you can type your detailed information about that line here:

Check the box as well. Click when done.

DO NOT ATTACH ANY ATTACHMENTS TO A LINE COMMENT. To add an attachment, follow the instructions on Page 34.
You will then be returned to the main Requisitions screen and can continue to enter the Line information. *Note:* the talk bubble now has lines in it to show that there is a comment typed there:
Adding Header Comments

To add a Header Comment(s), Click on the hyperlink **Add Comments** (or **Edit Comments** if you have already typed a Header Comment in previously):
If an “OFFSITE” Ship To Location was chosen, enter the entire Ship To Address in the Header Comment field as follows:

- Check the box
- To View All Comments, Click View All
- To add additional Header Comments, Click
To add Standard Comments, click on the [Use Standard Comments] hyperlink:

The Standard Comments box will appear. Click on the Comment Type Search icon.

The Look Up Comment Type box will appear. Choose REQ.
REQ will populate into the Comment Type box. Next, Click on the Comment ID Search icon : 

The Look Up Comment ID box will appear. Choose “AMT”. 

AMT will populate into the Comment ID box and the entire comment will populate into the Comments box: 

After clicking OK, the comment will be brought into the Header Comments and you can fill in the PO amount before this change (if any), the amount of this change (the amount of the increase or decrease or $0 if it’s a transfer), and the new PO amount this creates. 

Click to return to the Header Comments and complete the comment.
➢ Adding Attachments

To add an Attachment(s), Click Attach in the Header Comments box:

This message will appear:

Click Browse...
Using the navigation on your computer, find the file that you want to attach to the Requisition:

Double-click on the file you want to attach to the Requisition

The name of the file will pop up in a window:

Click **Upload** to attach the file
The Attachment will be listed on the Comment. If you would like the Attachment to be included with the resulting Purchase Order, check the [Email] box.

(If the Attachment is for internal use only do not check the [Email] box. - For example, if the Attachment includes a Sole Source Justification, the e-mail check box will not be checked.)

To view the Attachment, Click [View]. The Attachment will pop up in a new window. After checking for accuracy, close the new window to return to the Requisition.

To View All Comments, click on the [View All] hyperlink. Once you are in the “View All” Mode, you can either scroll down to the last Comment to add another Comment or insert Comments in between other Comments.
Continue adding more Attachments by clicking. **Please note:** PeopleSoft allows you to attach only 1 attachment per Comment box – if you have 2 more attachments, you will need to add 2 more Comment boxes.

Click **OK** when done.
This will bring you back to the main Requisition screen:

Click on **Save** to save all of your changes to the Requisition.

This message will appear:

Click **OK**

➤ **You are now ready to Print your Requisition.**
Print the Requisition

To View and/or print a copy of the Requisition, click the View Printable Version hyperlink on the main Requisition screen:

This message may appear:

Click

The following message will appear:

Click

- A new window will open in PeopleSoft and will display the Printable Version of the Requisition. Check it for accuracy.
A second tab will open as the Printable Version queues and then prints to the screen.
Proofread this copy to make sure all information is correct.
If any changes need to be made, close this tab and go back to the Add/Update Requisitions tab to make and save changes to the Requisition and then Click.

Tab 1 = Add/Update Reqs
Tab 2 = Printable Version of Req
To print the Requisition, choose either [File] in the upper left of the screen or the printer icon in the upper right of the screen.

Once you have previewed and printed the Requisition, close the second window by clicking [X]:

On the following pages, you will find instructions on how to proceed for both:
- Originator (page 42); or
- Requester (page 43)
**ORIGINATOR Procedures:**

When the requisition is Complete and if you are an “Originator”, uncheck the box and click:

![Save button](image)

The Requisition will remain in open status until the Requester submits the Requisition for approval.

The Requester will receive an e-mail informing them that a Requisition is pending and needs to be submitted for approval:

```
This e-mail is to notify you that College Requisition: 0000019932, entered by bettyg is in open status and needs to be submitted for approval.
```

If you are a “Requester” and you have received an e-mail regarding submitting a Requisition for approval, log on to PeopleSoft and retrieve the Requisition via the following navigation:

(Purchasing>Add/Update Requisitions>Find an Existing Value).

Enter the Requisition ID and click Search.

Once you have reviewed the Requisition, follow the above steps to change the status from open to pending.

The Requisition has now entered the Workflow Approval Process.

*Once this happens the Requisition cannot be retrieved.*
REQUESTER Procedures:

When the Requisition is Complete, if you are a “Requester” and you have entered the Requisition, uncheck the [ ] Hold From Further Processing Box:

Then Click on the [ ] icon to Submit for Approval (the status changes from Open to Pending):

Then Click [ ] at the bottom of the screen.

The Requisition has now entered the Workflow Approval Process.

*Once this happens the Requisition cannot be retrieved.*
Workflow Approval Process

Level 1 - Signatory for Signature Authorization
Level 2 - Final Review from Signature Authorization
Level 3 - Administrative Approvals; i.e.:
  • Foundation Office when using Foundation Funds
  • Sponsored and Cost Accounting when using Research Funds
  • Business Services when using Bond Funds
Level 4 - Administrative Approvals which are based on the Category/Account Code
  • Controller’s Office for Prepaid Costs, Revolving Loan Costs and Service Charges
  • Capital Projects for Construction-related expenses
  • Public Safety for Radioactive Materials and Safety Supplies
  • Property Department for Capital Equipment on fund 500

The Approver(s) (Level 1) will receive this e-mail:

This e-mail is to notify you that College Requisition: 0000019882, Requester: bettyg, is seeking level 1 approval for Chartfield String: URIPS10040550000, and has been added to your e-Campus Financials Worklist.

The Approver(s) can either Approve or Deny the Requisition.

Note: All Approval Levels have the authority to Approve or Deny a Requisition.

If the Requisition is Denied, the Requester will receive an e-mail informing them that the Requisition has been Denied. If the Approver indicated a reason it will appear as a Comment:

This e-mail is to notify you that College Requisition: 0000019881 entered on 01/25/2012 has been denied by OPRID: bettyg
Comments: Use fund 110

Once a Requisition has been Denied, the Requester can retrieve the Requisition (use this Navigation: Purchasing>Add/Update Requisitions>Find an Existing Value).

Enter the Requisition ID and click Search.

Make necessary changes, pre-Approve and Click [Save].

Upon saving the Requisition, the Workflow Approval Process, will begin again.

If a Requisition needs to be Canceled please see “Canceling a Requisition” on page 47.
If the Approver(s) (Level 1) Approve the Requisition and any other Approvals that may be required; i.e. (Level 2) Final Review, (Level 3) Foundation Office (if Foundation Funds are being used, Sponsored and Cost Accounting if Research Funds are being used, etc.), (Level 4) based on Category/Account, the Requester will receive an e-mail indicating that the Requisition has been Approved:

This e-mail is to notify you that College Requisition: 0000019882 entered on 01/25/2012 has been approved.

Once the College Requisition has been approved by all levels, the Budget Checking Process will automatically be initiated. The Requisition will be routed to the URI Purchasing Department when the Budget Checking Process is complete and the Requisition is in valid Budget Status.

If the Requisition fails Budget Checking, the Requester will receive an e-mail:

This e-mail is to notify you that College Requisition: 0000019882 has budget errors.

Because the Requisition did not pass Budget Check, the Requester is able to access the Requisition and determine the cause of the Budget Error and either process a Budget Transfer and/or make the necessary changes:

Retrieve the Requisition (Nav:Purchasing>Requisitions>Add/Update Requisitions):

Click on the tab
Find an Existing Value

Enter the Requisition Number in the Requisition ID field

Click Search
In this particular example, the Budget Error Exception is the result of “Exceeds Budget Tolerance”.

When you retrieve the Requisition you will notice that the Budget Status: = Error and the Requisition has automatically been placed back on hold.

Click on the Error hyperlink to determine the cause of the budget error:
If a Budget Transfer is necessary to support the purchase, you will first need to make the Budget Transfer.

Once the Transfer has been made:

- Uncheck the [Hold From Further Processing] box; and
- Click [Save].
- In this example, the Requisition will not require Re-Approval and will invoke the Budget Process again.

If there are changes to the distributions, i.e.: change the Chartfield String or change the Price, the Workflow Approval Process will start again once the Requisition is taken off Hold, Submitted For Approval and Saved.

Other examples of Budget Error Exceptions include, but are not limited to:

**Budget Date Out of Bounds** - This Budget Exception typically occurs when using a Fund 500. If you receive a budget error of this type you will need to contact the appropriate accountant in the Sponsored & Cost Accounting Office.

When all is correct:

The URI Purchasing Department will issue a Purchase Order and will e-mail a copy to:

- **Supplier** – This is the Supplier’s authorization to proceed
- **Requisitioning Department** – This is the Department Receiving Report Copy

If there are any attachments, they will be a separate .PDF file. For example, the PO is one .PDF and the Attachment(s) are a separate .PDF.
Sample Purchase Order:

The Purchase Order number is located in the top right-hand corner.

Once the goods/services are received, the Department copy of the Purchase Order is to be signed by the individual who has signature authorization for “Receiving Reports” and forward to the URI Accounts Payble Office.

Note: Payment cannot be made until the URI Accounts Payable Office receives the invoice from the Supplier and the signed receiving report copy of the PO.

Returned Requisition

A College Requisition submitted to Purchasing requiring additional information, specifications, documentation, etc., may be returned. When a Requisition is returned from Purchasing, the requester will receive an e-mail stating the reason for return.
Returned Requisitions will not require Re-Approval through the Workflow Approval Process unless there is a change to the ChartField String or Price. For example, if a Requisition is returned for detailed specifications, the Requester will retrieve the Requisition (see instructions above to retrieve the Requisition), attach the specifications, and click the Resubmit button. Once the Resubmit button has been clicked, the Requisition will automatically route back to Purchasing.

If there is a change to Quantity, Price or ChartField String, a Change Order to the Requisition will be created and the Requisition will require Re-Approval. Once a change is made to one of the above Fields, you will receive the following message:

![Message]

This action will create a change order. Continue? (10200.27)
The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.

1. Click Yes
2. Click Save
3. Uncheck Hold From Further Processing
4. Click on Open
5. The Status will change from Open to Pending
6. Click Save

The Requisition has now entered the Workflow Approval Process. Once this happens the Requisition cannot be retrieved.
Canceling a Requisition

Requesters can cancel a College Requisition when the following conditions exist:
- **Status: Open/Budget Status: Not Checked** and the Hold From Further Processing is Checked. For example, if you prepare a Requisition and decide you no longer need the goods/services, it is your responsibility to cancel the Requisition.
- **Status: Denied/Budget Status: Not Checked**
- **Status: Returned Requisitions - Approved/Budget Status: Valid**

Example of Denied Requisition:
Example of Returned Requisition:

If the Hold From Further Processing box is checked, you must uncheck the box before cancelling the requisition.

To cancel a Requisition click on the "X".

This message will appear:

Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)

When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

Click "Yes"
PLEASE NOTE THESE TIPS:

- If you are requisitioning more than 5 Line Items, you may issue a Requisition with 1 line item; the description should read “See Attached Quote/Bid Sheet” and attach either the Quote containing all items or if no quote exists you may complete a Standard or Multi-Year Bid Sheet (located at: http://www.uri.edu/purchasing/forms.htm) and attach in an Excel format (not .pdf) to the Requisition.

- Comments – Comments can either be a typed Header Comment(s); a typed Line Comment(s); or an attached Document(s).
  - Comments or information pertaining to the purchase may be used for comments for the Supplier or internal comments.
  - For the Comments to print on the purchase order you must Check [Send to Supplier]. If the Comments are for internal use only, do not check the box.
  - All Requisition “comments” will print on the Requisition but will not print on the Purchase Order unless you have checked [Send to Supplier].
  - The Send to Supplier option applies to Comments in the Comment Text Box only, not to the documents attached. For the Attachment to be sent to the Supplier, you must Check the Email box next to the Attachment.

- All documentation relating to the purchase MUST be attached to the electronic Requisition. This includes but is not limited to; documented telephone Quotes and/or written Quotes, Sole Source Justification, Screening Form, etc.
  - Attachments, for the most part, must first be scanned and saved to a location where you will retrieve them and attach to the requisition. The naming convention for Attachments is as follows: Requisition Origin (CR), Requisition ID_ followed by the type of Attachment; i.e.: Bid Sheet, for example CR19887_Bid Sheet. However, Bid Sheets are to be attached in an Excel format (see section 2.1 of the URI Purchasing Manual).
  - Any Attachment that is to be sent to the Supplier along with the resulting Purchase Order will need to be scanned and attached separately and not combined with any internal documentation.
  - In order for the Attachment to be sent to the Supplier with the Requisition, remember to check the Email box.
> If You Have to Make a Change in the Defaults Screen

If you need to change something in the Requisition Defaults screen, after you make the change and click **OK**, a “Retrofit Field Changes...” screen will appear.

On this screen, you must check off the Fields that you would like this change to affect.

![Requisition Defaults Screen](image)

- **Original Ship To code**

  Type in the New Ship To code:  

  - **Ship To:**  

  Then Click **OK**.
For example, if you change the Ship To from Dining Services to Central Receiving, this message on the following page will pop up:

**Retrofit field changes to "all" existing requisition lines/schedules/distributions.....**

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>URIPS</th>
<th>Requisition Date</th>
<th>01/28/2019</th>
<th>Status</th>
<th>Open</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition ID</td>
<td>0000145729</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.

Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.
Select 'Apply to All Distrib' to apply changes to all distribution lines on the requisition.

- **Mark All**
- **Unmark All**

<table>
<thead>
<tr>
<th>Apply</th>
<th>Distrib Line</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Apply to All Distrib</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Ship To</td>
<td>4058_001_S</td>
<td></td>
</tr>
<tr>
<td>✓</td>
<td>1</td>
<td>GL Unit</td>
<td>URIPS</td>
<td></td>
</tr>
</tbody>
</table>

[STOP]

You have to choose which Field(s) to apply this change to by checking the box or boxes and then Click on **OK** to return to the main Requisitions screen:

**Retrofit field changes to "all" existing requisition lines/schedules/distributions.....**

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<tr>
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<td></td>
<td>Ship To</td>
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<td></td>
</tr>
<tr>
<td>✓</td>
<td>1</td>
<td>GL Unit</td>
<td>URIPS</td>
<td></td>
</tr>
</tbody>
</table>
On the Main Requisition screen, click **Save** to save your changes: