THE UNIVERSITY OF RHODE ISLAND

PeopleSoft Purchasing

Advice of Change

College Requisition (CR) or

Subcontract Requisition (SC)

Table of Contents

➢ **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:
   a. Changes to the Subrecipient's budget (i.e. the addition/reduction of funds or re-budgeting that requires sponsor approval).
   b. 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/ .

➢ **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.
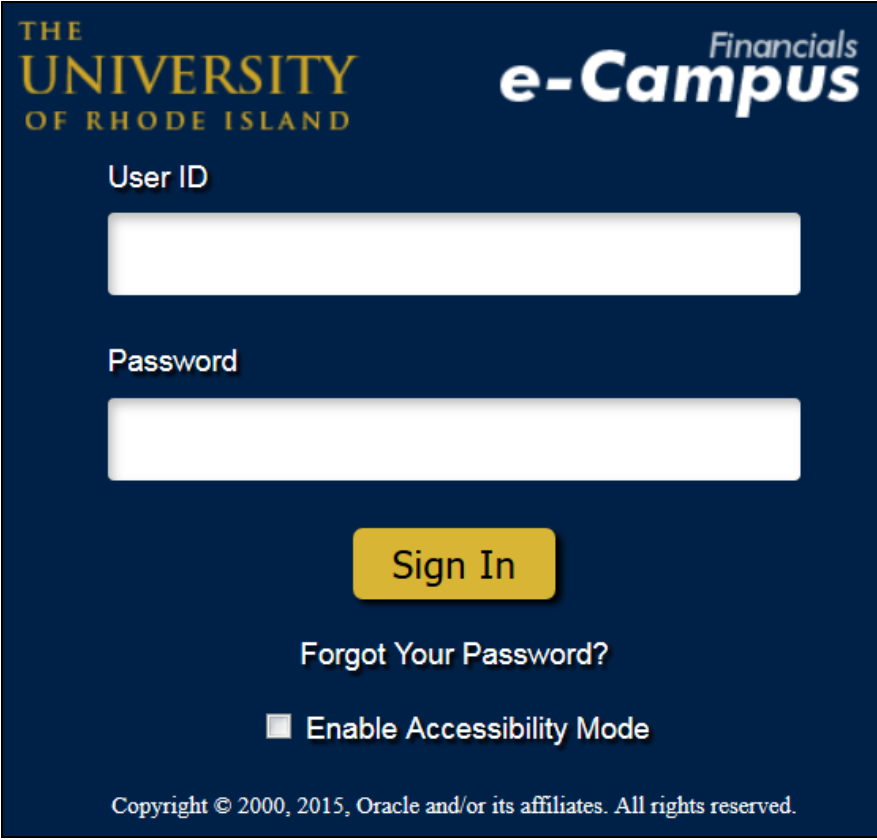
➢ Logging Into Peoplesoft

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:

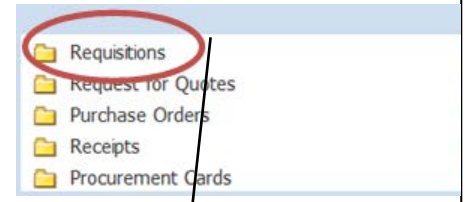https://appfsprod.uri.edu:9301/psp/fsprod/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&

THE
UNIVERSITY
OF RHODE ISLAND

Financials
e-Campus

User ID

Password

Sign In

Forgot Your Password?

☐ Enable Accessibility Mode

Copyright © 2000, 2015, Oracle and/or its affiliates. All rights reserved.
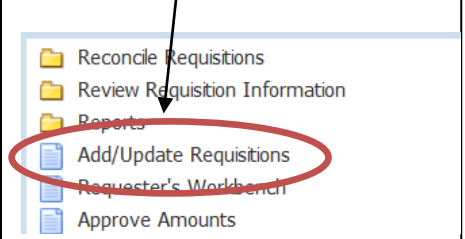
➢ **To Add a New Requisition**

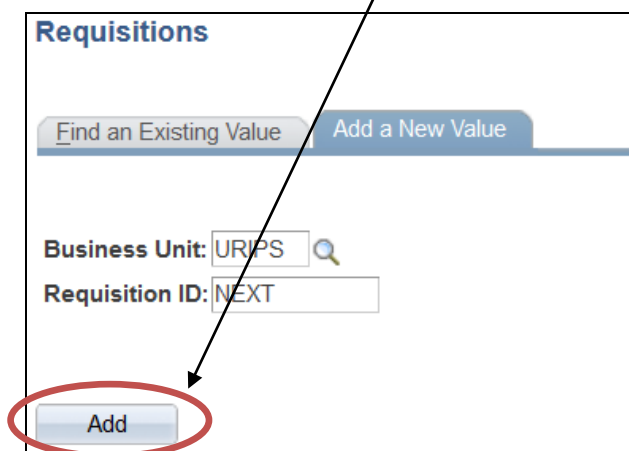**From the Main Menu, choose Purchasing:**
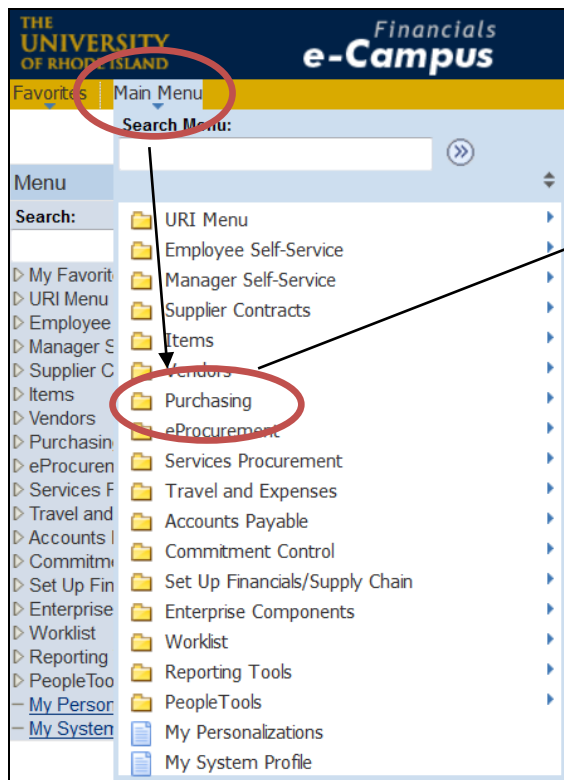
Then choose Requisitions:

Then choose Add/Update Requisitions:

To add a new Requisition, Click [Add] **:**

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 🔍 and Select CR ;

Then Click on the Requisition Defaults Hyperlink:

Maintain Requisitions
Requisition

Business Unit	URIPS	
Requisition ID	NEXT	
Requisition Name		

Requires State Approval: ☐   Resubmit

Status Open
Budget Status Not Chk'd

Copy From   Return: ☐   ☑ Hold From Further Processing

▼ Header ❓
*Requester kristenbellotti 🔍 Bellotti, Kristen
*Requisition Date 01/14/2019 📅 Requester Info
Origin KNG 🔍 Kingston
*Currency Code USD Dollar
Accounting Date 01/14/2019 📅

Requisition Defaults   Add Comments
Requisition Activities

Amount Summary ❓
Total Amount   0.00 USD

Add Items From ❓
Purchasing Kit   Catalog
Item Search   Requester Items

Line ❓   Personalize | Find | View All | 🖼 | 🎚 First ◀ 1 of 1 ▶ Last

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1		0.0000			0	0.00	Open	💬	📖	📅	➕	➖

View Printable Version   *Go to ...More...   ▼

💾 Save   📧 Notify   🔄 Refresh   ➕ Add

STOP

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.

Requisition Defaults

Business Unit URIPS		**Requisition Date** 01/14/2019	
Requisition ID NEXT		**Status** Open	

Default Options ❓

○ **Default**   If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

◉ **Override**   If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer	[ ] 🔍	Unit of Measure	[ ] 🔍
Supplier	[ ] 🔍	Supplier Location	[ ] 🔍
Category	[ ] 🔍		Supplier Lookup

Schedule

Ship To	[ ] 🔍	*Distribute By	Amount ▼
Due Date	[ ] 📅		
Ultimate Use Code	[ ]	Ship Via	BEST WAY 🔍
Attention To	[ ]	Freight Terms	FOB DEST 🔍
	One Time Address		

Distribution

SpeedChart [   ]

Distributions

| Details | Asset Information | (⊞) |

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	[ ]	URIPS 🔍	[ ]	[ ]🔍	[ ]🔍	[ ]🔍		[ ]🔍	[ ]🔍	[ ]🔍

[OK]   [Cancel]   [Refresh]

> ➤ **Supplier Lookup/Search**

Type the Supplier name or a portion of the Supplier name. If the Supplier is an individual, type the last name first. Click Search

Supplier Search

Search Criteria

Name	Short Name
Alternate Supp Name	
City	State
Country	Postal
Class	Type
Max Rows	10

Search

Search Results   Personalize | Find | View All | | First ◄ 1 of 1 ► Last

Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withholding Applicable
☐						

Supplier Detail   Address

OK   Cancel   Refresh

Select the Supplier from the Search Results by typing a check (√) 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.**

Supplier Search

Search Criteria

Name	dim	Short Name
Alternate Supp Name	
City	State
Country	Postal
Class	Type
Max Rows	10

Search   1 to 9 of 9

Search Results   Personalize | Find | View All | | First ◄ 1-4 of 9 ► Last

Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withholding Applicable
☐	0000019684	MAIN	1	DIMEOCONST-001	Dimeo Construction Co	N
☐	0000043383	MAIN	1	DIMARCOS-001	DiMarco,Steven F.	Y
☐	0000045705	MAIN	2	DIMARKPREC-001	Dimark Precision Machining Inc	N
☐	0000047058	MAIN	1	DIMENSIONA-001	Dimensional Packaging Inc	N

Supplier Detail   Address   ← **Click here to preview address**

OK   Cancel   Refresh

> **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**.

Requisition Defaults

Business Unit	URIPS	Requisition Date	01/28/2019
Requisition ID	NEXT	Status	Open

Default Options ?

○ Default — If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

◉ Override — If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer [ ] 🔍   Unit of Measure [ ] 🔍
Supplier [0000019684] 🔍 Dimeo Construction Co   Supplier Location [MAIN] 🔍
Category [ ] 🔍   Supplier Lookup

Schedule

Ship To [ ] 🔍   *Distribute By [Amount ▼]
Due Date [ ] 📅
Ultimate Use Code [ ]   Ship Via [BEST WAY] 🔍
Attention To [ ]   Freight Terms [FOB DEST] 🔍
One Time Address

Distribution

SpeedChart [ ]

Distributions

Details | Asset Information | 🔢

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	[ ]	URIPS 🔍	[ ]	[ ] 🔍	[ ] 🔍	[ ] 🔍		[ ] 🔍	[ ] 🔍	[ ] 🔍

[OK] [Cancel] [Refresh]

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**.

➢ Ship To Location

The Ship To Location is where the goods/services will be delivered. Select the Ship To Location in one of these ways:

➢ If you know the four-digit Department Number where the goods/services are being delivered you may enter that number in the Ship To: [   ] field, click 🔍 and select from the Search Results;

OR

➢ Search by the Department Name by clicking the 🔍 next to the Ship To field, type the Department Name in the Description field, click [Look Up] and select from the Search Results.

Requisition Defaults

Business Unit URIPS	**Requisition Date** 01/28/2019
Requisition ID NEXT	**Status** Open

Default Options ❓

○ Default   If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

● Override   If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer [ ] 🔍		**Unit of Measure** [ ] 🔍	
Supplier 0000019684 🔍 Dimeo Construction Co		**Supplier Location** MAIN 🔍	
Category 655A 🔍		Supplier Lookup	

Schedule

Ship To [ ] 🔍		***Distribute By** Amount ▾
Due Date [ ] 📅		**Ship Via** BEST WAY 🔍
Ultimate Use Code [ ]		**Freight Terms** FOB DEST 🔍
Attention To [ ]		
One Time Address		

Distribution

SpeedChart [   ]

Distributions

| Details | Asset Information |

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	[ ]	URIPS 🔍	[ ]	[ ]🔍	[ ]🔍	[ ]🔍	[ ]	[ ]🔍	[ ]🔍	[ ]🔍

[OK] [Cancel] [Refresh]

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:

Click [OK]

Message   ✖

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

[OK]

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.

➢ **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.**

Requisition Defaults

Business Unit URIPS   Requisition Date 01/28/2019
Requisition ID NEXT   Status Open

Default Options ❓

○ Default — If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

● Override — If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer [ ] 🔍   Unit of Measure [ ] 🔍
Supplier 0000019684 🔍 Dimeo Construction Co   Supplier Location MAIN 🔍
Category 655A 🔍   Supplier Lookup

Schedule

Ship To 4046_001_B 🔍 Capital Projects   *Distribute By Amount ▼
Due Date [ ] 📅
Ultimate Use Code [ ]   Ship Via BEST WAY 🔍
Attention To [ ]   Freight Terms FOB DEST 🔍
One Time Address

Distribution

SpeedChart [ ]

Distributions

Details | Asset Information | ▦▶

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	[ ]	URIPS 🔍						[ ] 🔍	[ ] 🔍	[ ] 🔍

OK | Cancel | Refresh

Click OK **when done.**

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 .   OK   **You will be returned to the Maintain Requisitions page.**

> **Line Items**

On the main Requisition page:

Description – The Description on all Advice of Change Reqs should read: *Advice of Change to PO # (reference original PO #).*

The Description also needs to indicate if this is an *increase* or a *decrease* and the actual *amount* of the increase or decrease.

Maintain Requisitions

Requisition

Business Unit	URIPS	
	Requires State Approval: ☐	Resubmit
Requisition ID	NEXT	Status: Open
Requisition Name		Budget Status: Not Chk'd

Copy From   Return: ☐   ☑ Hold From Further Processing

▼ **Header** ?

*Requester	kristenbellotti 🔍 Bellotti,Kristen
*Requisition Date	01/28/2019 📅 Requester Info
Origin	CR 🔍 College Requisition
*Currency Code	USD Dollar
Accounting Date	01/28/2019 📅

Requisition Defaults   Add Comments
Requisition Activities

Amount Summary ?

Total Amount   0.00 USD

Add Items From ?

Purchasing Kit   Catalog
Item Search   Requester Items

Line ?   Personalize | Find | View All | 🔲 | 🔢 First ◄ 1 of 1 ► Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls

Line	Description		Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	Advice of Change to PO #106816	🔍	0.0000	🔍	655A 🔍	0	0.00	Open	💬	📖	📄	➕	➖

View Printable Version

*Go to ...More... ▼

🔲 Save   ✉ Notify   🔄 Refresh   ➕ Add

🛑 **STOP**

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).

> ➤ **Quantity**

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.

Maintain Requisitions

Requisition

| Business Unit | URIPS | | Status | Open |

Requisition ID   NEXT

Requisition Name

Requires State Approval: ☐   [Resubmit]

Budget Status Not Chk'd

Copy From   Return: ☐   ☑ Hold From Further Processing

▼ Header ❓

*Requester kristenbellotti 🔍   Bellotti,Kristen
*Requisition Date 01/28/2019 📅   Requester Info
Origin CR 🔍   College Requisition
*Currency Code USD   Dollar
Accounting Date 01/28/2019 📅

Requisition Defaults   Add Comments
Requisition Activities

Amount Summary ❓

Total Amount   0.00 USD

Add Items From ❓

Purchasing Kit   Catalog
Item Search   Requester Items

Line ❓   Personalize | Find | View All | 🔲 | 🎬 First ◀ 1 of 1 ▶ Last

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls |

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Advice of Change to PO #106816	0.0000		655A	🔍 0	0.00	Open	⊕ ⊖

View Printable Version   *Go to ...More...

💾 Save   📧 Notify   🔄 Refresh

> ➤ **Category**

REMINDER:
Only one Category Code can be used per line

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:

1-1	Advice of Change to PO #106816 to transfer funds and decrease by $5,000 for FY19	1.0000 TOT	1.0000	1.00 06/30/2019
2-1	And increase PO by $5,000 for FY19	1.0000 TOT	5,000.0000	5,000.00 06/30/2019

Total Requisition Amount: 5,001.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2019	1-1-1	9655-100-4055-0000			1.00	
FY2019	2-1-1	9655-110-4061-0000			5,000.00	

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**

and

2 **$5,000 is being added to CFS #9655-110-4061-0000 on line two with an amount of $5,000**
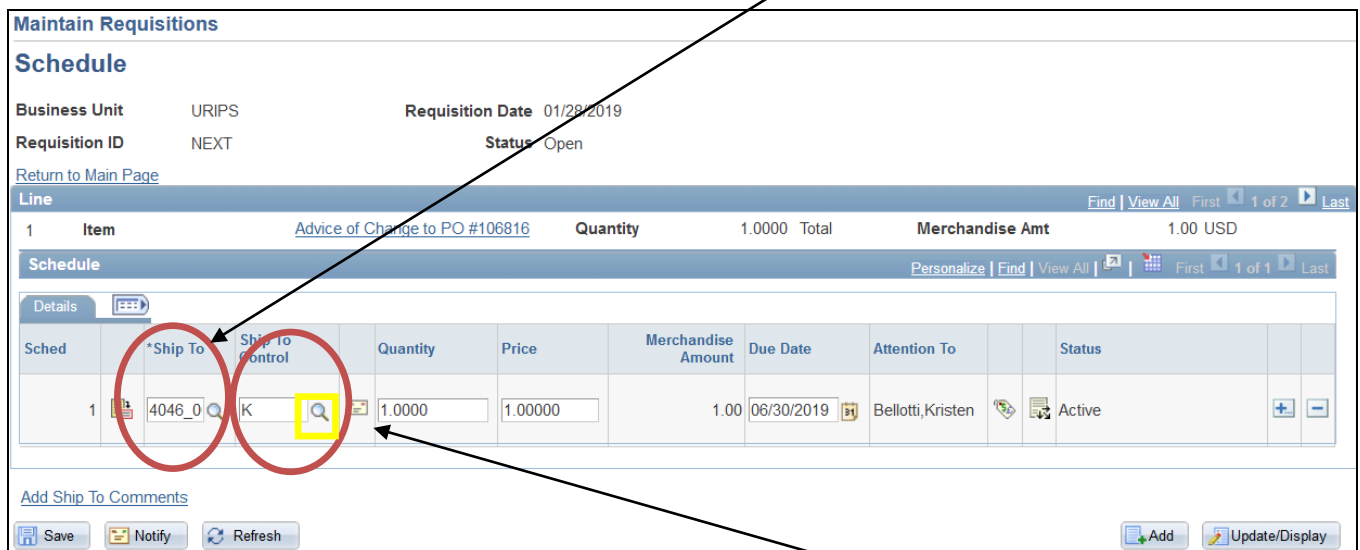
When done entering the Line information, click the Schedule icon 🕐 **for each line, starting with Line 1.**

> ➤ **Ship To**   **Defaults from the Requisition Defaults page:**

> ➤ **Ship To Control**   **The default Ship To Control is "K" for Kingston Central Receiving:**

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**

Look Up Ship To Control   ☒

                                                        ? Help

Field Value: begins with ▾ [   ]

Translate Long Name: begins with ▾ [   ]

[Look Up] [Clear] [Cancel] Basic Lookup

Search Results

View 100	First ◀ 1-3 of 3 ▶ Last
Field Value	**Translate Long Name**
D	Direct Delivery
G	GSO Central Receiving
K	Kingston Central Receiving

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 Tootell 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 <u>do not</u> access the Add Ship To Comments .
   * "SEE BELOW" will print in the Ship To area on the printed PO:

> **Ship To:**   SEE BELOW

➢ Ship to Comments

When processing an Advice of Change, _DO NOT_ enter a Ship To Comment.

Maintain Requisitions

Schedule

Business Unit	URIPS	Requisition Date	01/28/2019
Requisition ID	NEXT	Status	Open

Return to Main Page

Line   Find | View All   First ◀ 1 of 2 ▶ Last

1	**Item**	Advice of Change to PO #106816	**Quantity**	1.0000 Total	**Merchandise Amt**	1.00 USD

Schedule   Personalize | Find | View All | 🔲 | 📊 First ◀ 1 of 1 ▶ Last

Details ▦

Sched		*Ship To	Ship To Control		Quantity	Price	Merchandise Amount	Due Date	Attention To			Status		
1	📋	4046_0 🔍	K	🔍 📧	1.0000	1.00000	1.00	06/30/2019 📅	Bellotti,Kristen	🏷	📑	Active		➕ ➖

~~Add Ship To Comments~~

💾 Save   📧 Notify   🔄 Refresh   ➕ Add   📝 Update/Display

➢ <u>Entering Distributions on the Line</u>

Click on the 📑 **Distribution tab on the Schedule page:**

Maintain Requisitions

Schedule

Business Unit	URIPS	Requisition Date	01/28/2019
Requisition ID	NEXT	Status	Open

Return to Main Page

Line   Find | View All   First ◀ 1 of 2 ▶ Last

1	**Item**	Advice of Change to PO #106816	**Quantity**	1.0000 Total	**Merchandise Amt**	1.00 USD

Schedule   Personalize | Find | View All | 🔲 | 📊 First ◀ 1 of 1 ▶ Last

Details ▦

Sched		*Ship To	Ship To Control		Quantity	Price	Merchandise Amount	Due Date	Attention To			Status		
1	📋	4046_0 🔍	K	🔍 📧	1.0000	1.00000	1.00	06/30/2019 📅	Bellotti,Kristen	🏷	📑	Active		➕ ➖

Add Ship To Comments

💾 Save   📧 Notify   🔄 Refresh   ➕ Add   📝 Update/Display

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 [OK] **to add 1 row.**

Enter number of rows to add:

1

[OK]   [Cancel]

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 #_
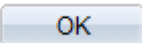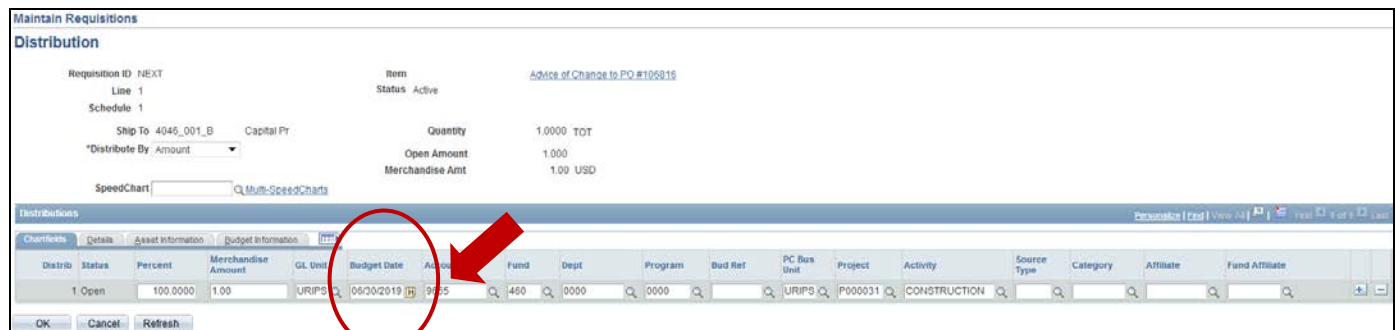
Enter the Percent or Amount for each Distribution Line along with Fund, Dept, Program and if the ChartField String contains a Project and an Activity, select the

PC Bus Unit (URIPS) by clicking [🔍] and type the Project and Select the Activity by clicking [🔍] .

NOTE: The Budget Date defaults to the current date. Therefore, when processing an Advice of Change that affects a future Fiscal Year, the Budget Date must be changed in order to pre-encumber the funds in the appropriate Fiscal Year.   Change the Budget Date, if necessary, and click [OK]

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 **Asset Information** Tab to access the Fab number Field.

Maintain Requisitions

Distribution

Requisition ID NEXT	Item	Advice of Change to PO #106816
Line 1	Status Active	
Schedule 1		

Ship To 4046_001_B Capital Pr   Quantity 1.0000 TOT
*Distribute By Amount ▼   Open Amount 1.000
                                      Merchandise Amt 1.00 USD

SpeedChart [   ] 🔍 Multi-SpeedCharts

Distributions

Chartfields	Details	Asset Information	Budget Information	

Distrib	Status	Percent	AM Unit	Profile ID	CAP #	Sequence	Tag Number	FAB Number
1	Open	100.0000	🔍	🔍	🔍	🔍		

[OK] [Cancel] [Refresh]

Enter the FAB Number in the appropriate 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.:

Message

FAB Number Required on Line 1 Distribution 1

Requisition distributions using account 9669 require an FAB Number.

[OK]

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

College Requisition
This Form is for Internal Use Only

Suggested Vendor Name: N/A
Vendor Address: N/A

Business Unit:	URIPS	OPEN
Date	Page	Req ID:
02/13/2018	1	0000097314
Requester	E-mail for Receiving Report	
Angell,Tracey	traceye@discard.uri.edu	
Requester Dept.	Phone #	Fax #
Purchasing	401/874-2326	401/874-2306

Ship To: University of Rhode Island
Purchasing Department
10 Tootell Rd., Suite 3
Kingston, RI 02881

Attachments: N

Line-Sch	Description	Quantity UOM	Price	Extended Amt	Due Date
1-1	Fabrication Equipment (Test)	1.0000 EA	5,000.0000	5,000.00	02/28/2018

Total Requisition Amount: 5,000.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2018	1-1-1	9669-100-4055-0000			5,000.00	123

Once a PO is issued, the FAB number(s) will print near the PO Type on the bottom of the PO

Purchase Order

Page 1 of 1

THE
UNIVERSITY
OF RHODE ISLAND

Date Ordered	Revision	
02/13/2018		P.O.# 0000101170
Payment Terms	Freight Terms	Ship Via
Net 30	FOB DESTINATION	BEST WAY
Buyer	Phone	Due Date
Angell,Tracey	401/874-2326	02/28/2018
Requester	Phone	Requester Email
Angell,Tracey	401/874-2326	tracey@discard.uri.edu

Bill To: Accounting - aprec@etal.uri.edu
URI, Carlotti Admin. Bldg.
75 Lower College Rd., Suite 1
Kingston RI 02881
(401) 874-7553

Vendor: 0000002328
Fisher Scientific Company LLC
300 Industry Drive
Pittsburgh PA 15275

Ship To: University of Rhode Island
Purchasing Department
10 Tootell Rd., Suite 3
Kingston RI 02881

Tax Exempt? Y   Tax Exempt ID: 189

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
1-1	Fabrication Equipment (Test)	1.00	EA	5,000.00	5,000.00	02/28/2018

Amount 5,000.00

NOTES TO VENDOR:

THE ABOVE PO# MUST APPEAR ON ALL INVOICES

Rhode Island law requires that an MSDS be provided for each product containing hazardous chemicals as defined by OSHA and Rhode Island regulations. Please include a copy with the shipment and send an additional copy to the Department of Public Safety, Environmental Health and Safety, 177 Plains Road, Kingston, RI 02881

This purchase is made in accordance with the General Conditions of Purchase of the Board of Governors for Higher Education, copies of which are available at http://web.uri.edu/purchasing/

Every person or business entity providing goods or services at a cost of $5000 cumulated value is required to file an affidavit regarding political campaign contributions with the RI State Board of Elections even if no reportable campaign contributions have been made. (RI General Law 17-27) Forms can be obtained at the Board of Elections, Campaign Finance Division, 50 Branch Avenue, Providence, RI, 02904 (401-222-2056).

INTERNAL USE ONLY

Period	Accounts	Projects	Activity	Category		Requisition ID	PO Type	FAB
FY2018	9669-100-4055-0000			669A	5,000.00	97314	S1	123

➢ **Return to Schedule Page**

Click the hyperlink Return to Main Page :

Maintain Requisitions

Schedule

Business Unit	URIPS	Requisition Date	01/28/2019
Requisition ID	NEXT	Status	Open

Return to Main Page

Line   Find | View All First ◄ 1 of 2 ► Last

1   Item   Advice of Change to PO #106816   **Quantity**   1.0000 Total   **Merchandise Amt**   1.00 USD

Schedule   Personalize | Find | View All | 🖼 | 🎫   First ◄ 1 of 1 ► Last

Details ▦

Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status		
1 📋	4046_0 🔍	K 🔍	📧 1.0000	1.00000	1.00	06/30/2019 📅	Bellotti,Kristen 🏷 📋	Active	➕	➖

Add Ship To Comments

🖫 Save   📧 Notify   🔄 Refresh   📑 Add   📝 Update/Display

This will return you to the Maintain Requisitions page:

Maintain Requisitions

Requisition

Business Unit	URIPS	Requires State Approval: ☐	Resubmit	Status	Open
Requisition ID	NEXT			Budget Status	Not Chk'd

Requisition Name

Copy From   Return: ☐   ☑ Hold From Further Processing

▼ **Header** ❓

*Requester	kristenbellotti 🔍	Bellotti,Kristen
*Requisition Date	01/28/2019 📅	Requester Info
Origin	CR 🔍	College Requisition
*Currency Code	USD	Dollar
Accounting Date	01/28/2019 📅	

Requisition Defaults   Add Comments
Requisition Activities

Amount Summary ❓

Total Amount   5,001.00 USD

Add Items From ❓

Purchasing Kit   Catalog
Item Search   Requester Items

Line ❓   Personalize | Find | View All | 🖼 | 🎫   First ◄ 1-2 of 2 ► Last

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls | ▦ |

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1 📋	Advice of Change to PO 📋	1.0000	TOT 🔍	655A 🔍	1.00000	1.00	Open	💬	📖	📋	➕	➖
2 📋	And increase CFS 📋	1.0000	TOT 🔍	655A 🔍	5,000.00000	5,000.00	Open	💬	📖	📋	➕	➖

View Printable Version   *Go to ...More...   ▼

🖫 Save   📧 Notify   🔄 Refresh   📑 Add

When all lines are complete, Click 🖫 Save

To add additional Line Items, see page 26.
Click 🖫 Save when done.

This message will appear:

> **Message**
>
> This Requisition will be held from further processing (20001,42)
>
> The Hold From Further Processing check box is currently on for this requisition. If your intention is to hold this requisition simply hit the OK button in this message box. If you would like to release this requisition, turn off the Hold From Further Processing check box and hit the save button.
>
> OK

Click OK

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)

Maintain Requisitions

Requisition

Business Unit URIPS	Requires State Approval: ☐ Resubmit
Requisition ID 0000145729	Status Open
Requisition Name 0000145729	Budget Status Not Chk'd
	Return: ☐
	☑ Hold From Further Processing

▾ Header ?

*Requester kristenbellotti 🔍 Bellotti,Kristen
*Requisition Date 01/28/2019 📅 Requester Info
Origin CR 🔍 College Requisition
*Currency Code USD Dollar
Accounting Date 01/28/2019 📅

Requisition Defaults   Add Comments
Requisition Activities
Document Status

Amount Summary ?

Total Amount   5,001.00 USD

Add Items From ?

Purchasing Kit   Catalog
Item Search   Requester Items

Select Lines To Display ?

Search for Lines
Line [ ] 🔍 To [ ] 🔍 Retrieve

Line ?   Personalize | Find | View All | 🔄 | 🎫   First ◀ 1-2 of 2 ▶ Last

Tabs: Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls

Line		Description		Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	📋	Advice of Change to PO.. 🔗	🔍	1.0000	TOT 🔍	655A 🔍	1.00000	1.00	Open	💬	📖	📷	➕ ➖
2	📋	And increase CFS 🔗	🔍	1.0000	TOT 🔍	655A 🔍	5,000.00000	5,000.00	Open	💬	📖	📷	➕ ➖

View Printable Version   *Go to ...More...   ▼

💾 Save   🔍 Return to Search   📋 Notify   🔄 Refresh   ➕ Add

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 Add Comments **hyperlink.**

➤ To Add Additional Line Items

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

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

Enter number of rows to add:

2

OK   Cancel

Requisition

Business Unit	URIPS
Requisition ID	0000145729
Requisition Name	0000145729

Requires State Approval: ☐ [Resubmit]

Return: ☐

Status: Open

Budget Status: Not Chk'd

☑ Hold From Further Processing

▼ Header ❓

*Requester	kristenbellotti 🔍 Bellotti,Kristen
*Requisition Date	01/28/2019 📅 Requester Info
Origin	CR 🔍 College Requisition
*Currency Code	USD Dollar
Accounting Date	01/28/2019 📅

Requisition Defaults   Add Comments
Requisition Activities
Document Status

Amount Summary ❓

Total Amount   5,001.00 USD

Add Items From ❓

Purchasing Kit   Catalog
Item Search   Requester Items

Select Lines To Display ❓

Search for Lines

Line [ ] 🔍 To [ ] 🔍 [Retrieve]

Line ❓   View All | 🔍 | 🔳 First ◁ 1-4 of 4 ▷ Last

> **Type the Description, Quantity, UOM and Price for each additional Line:**

							Amount	Status					
1	📑	Advice of Change to PO⚤↗	🔍↗	1.0000	TOT 🔍	655A 🔍	1.00000	1.00	Open	💬	📖	📇	➕ ➖
2	📑	And increase CFS ⚤↗	🔍↗	1.0000	TOT 🔍	655A 🔍	5,000.00000	5,000.00	Open	💬	📖	📇	➕ ➖
3	📑	↗	🔍↗	0.0000	🔍	🔍	0	0.00	Open	💬	📖	📇	➕ ➖
4	📑	↗	🔍↗	0.0000	🔍	🔍	0	0.00	Open	💬	📖	📇	➕ ➖

View Printable Version   *Go to ...More... [▼]

[💾 Save] [🔍 Return to Search] [📧 Notify] [🔄 Refresh]   [➕ Add]

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]
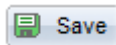
You will receive the following message:

Message

This Requisition will be held from further processing (20001,42)

The Hold From Further Processing check box is currently on for this requisition. If your intention is to hold this requisition simply hit the OK button in this message box. If you would like to release this requisition, turn off the Hold From Further Processing check box and hit the save button.

[OK]

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.

Maintain Requisitions

Requisition

Business Unit	URIPS
Requisition ID	0000145729
Requisition Name	0000145729

Requires State Approval: ☐ [Resubmit]

Status Open
Budget Status Not Chk'd

Return: ☐   ☑ Hold From Further Processing

▼ Header ❓

*Requester	kristenbellotti 🔍 Bellotti,Kristen
*Requisition Date	01/28/2019 📅 Requester Info
Origin	CR 🔍 College Requisition
*Currency Code	USD Dollar
Accounting Date	01/28/2019 📅

Requisition Defaults   Add Comments
Requisition Activities
Document Status

Amount Summary ❓

Total Amount   5,001.00 USD

Add Items From ❓

Purchasing Kit	Catalog
Item Search	Requester Items

Select Lines To Display ❓

Search for Lines
Line [ ] 🔍 To [ ] 🔍 [Retrieve]

Line ❓   Personalize | Find | View All | 🔲 | 🔳   First 1-2 of 2 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	🔲

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	Advice of Change to PO	1.0000	TOT 🔍	655A 🔍	1.00000	1.00	Open	💬	📖	📄	➕	➖
2	And increase CFS	1.0000	TOT 🔍	655A 🔍	5,000.00000	5,000.00	Open	💬	📖	📄	➕	➖

View Printable Version   *Go to ...More... ▼

[💾 Save] [🔍 Return to Search] [✉ Notify] [🔄 Refresh]   [➕ Add]

🛑 **STOP**   **DO NOT ATTACH ANY ATTACHMENTS TO A LINE COMMENT.**
To add an attachment, follow the instructions on Page 34.

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

Check the
☑ **Send to Supplier**
box as well.

Click [OK] **when done.**

Line Comments

Business Unit	URIPS		Requisition Date	01/28/2019
Requisition ID	0000145729		Status Open	Line 1

☑ Retrieve Active Comments Only [Retrieve]
*Sort Method Comment Time Stamp ▼   *Sort Sequence Ascending ▼   [Sort]

Comments   Find | View All First 1 of 1 Last

Use Standard Comments   Comment Status Active   [Inactivate] ➕
Use Item Specifications

Type in details about the transfer here if you need more info to explain

☑ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document

Attachment   [Attach] [View] [Delete] ☐ Email

From -> REQ URIPS-0000145729-1

[OK] [Cancel] [Refresh]

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:**

Maintain Requisitions

Requisition

Business Unit	URIPS			Status	Open
Requisition ID	0000145729				
				Budget Status	Not Chk'd

Requires State Approval: ☐ [Resubmit]

Requisition Name 0000145729

Return: ☐   ☑ Hold From Further Processing

▼ Header ?

*Requester	kristenbellotti	🔍	Bellotti,Kristen
*Requisition Date	01/28/2019	📅	Requester Info
Origin	CR	🔍	College Requisition
*Currency Code	USD		Dollar
Accounting Date	01/28/2019	📅	

Requisition Defaults   Add Comments
Requisition Activities
Document Status

Amount Summary ?

Total Amount   5,001.00 USD

Add Items From ?

Purchasing Kit   Catalog
Item Search   Requester Items

Select Lines To Display ?

Search for Lines
Line [　] 🔍 To [　] 🔍 [Retrieve]

Line ?   Personalize | Find | View All | 🔁 | 🗒 First ◀ 1-2 of 2 ▶ Last

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls |

Line	Description			Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	📋	Advice of Change to PO...	🔗	🔍 1.0000	TOT 🔍	655A 🔍	1.00000	1.00	Open		💬	📖	📅	➕ ➖
2	📋	And increase CFS	🔗	🔍 1.0000	TOT 🔍	655A 🔍	5,000.00000	5,000.00	Open		💬	📖	📅	➕ ➖

View Printable Version   *Go to ...More...   ▼

[💾 Save] [🔍 Return to Search] [📋 Notify] [🔄 Refresh]   [➕ Add]

➤ **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:

Header Comments

Business Unit URIPS   Requisition Date 01/28/2019
Requisition ID 0000145729   Status Open

☑ Retrieve Active Comments Only   [Retrieve]
*Sort Method [Comment Time Stamp ▼]   *Sort Sequence [Ascending ▼]   [Sort]

Comments   First | View All   First ◄ 1 of 2 ►

Use Standard Comments   Comment Status Active   [Inactivate]   [+]

URI Capital Projects
c/o The Ryan Center
One Lincoln Almond Plaza
Kingston, RI 02881

☑ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document
Attachment   [Attach] [View] [Delete] ☐ Email

From -> REQ URIPS 0000145729
[OK] [Cancel] [Refresh]

Check the ☑ Send to Supplier 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".

Standard Comments

Comments

*Action: Copy Comment

Comment Type: REQ   Comment ID: [   ] 🔍

*Effective Date: 10/31/2017   *Status: Active ▼

Description: [   ]

Short Desc: [   ]

Comments: [   ]

[OK] [Cancel] [Refresh]

Look Up Comment ID

? Help

SetID: URIPS
Standard Comment Type: REQ
Standard Comment ID: begins with ▼ [   ]
Description: begins with ▼ [   ]
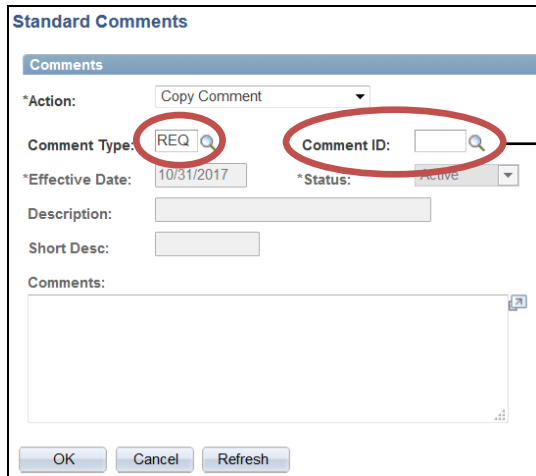
[Look Up] [Clear] [Cancel] Basic Lookup

Search Results

View 100   First ◄ 1-3 of 3 ► Last

Standard Comment ID	Description
AMT	New P.O. Amount
BLKT	Blanket Requirements:
HDR	Second Header Description

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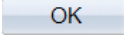
Standard Comments

Comments

*Action Copy Comment ▼

Comment Type REQ 🔍   Comment ID AMT 🔍

*Effective Date 01/28/2019   *Status Active ▼

Description New P.O. Amount

Short Desc New PO Amt

Comments:
Current P.O. Amount $
This Change $
New P.O. Amount $

[OK] [Cancel] [Refresh]

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 [OK] to return to the Header Comments and complete the comment.

➢ **Adding Attachments**

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

Header Comments

Business Unit URIPS   Requisition Date 01/28/2019
Requisition ID 0000145729   Status Open

☑ Retrieve Active Comments Only   Retrieve

*Sort Method Comment Time Stamp ▼   *Sort Sequence Ascending ▼   Sort

Comments   Find | View All   First ◄ 1 of 2 ► Last

Use Standard Comments   Comment Status Active   Inactivate   +
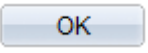
☐ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document
Attachment   Attach   View   Delete   ☐ Email

OK   Cancel   Refresh

This message will appear:

File Attachment   ☒
                                                ? Help

Browse...   No file selected.
Upload   Cancel

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
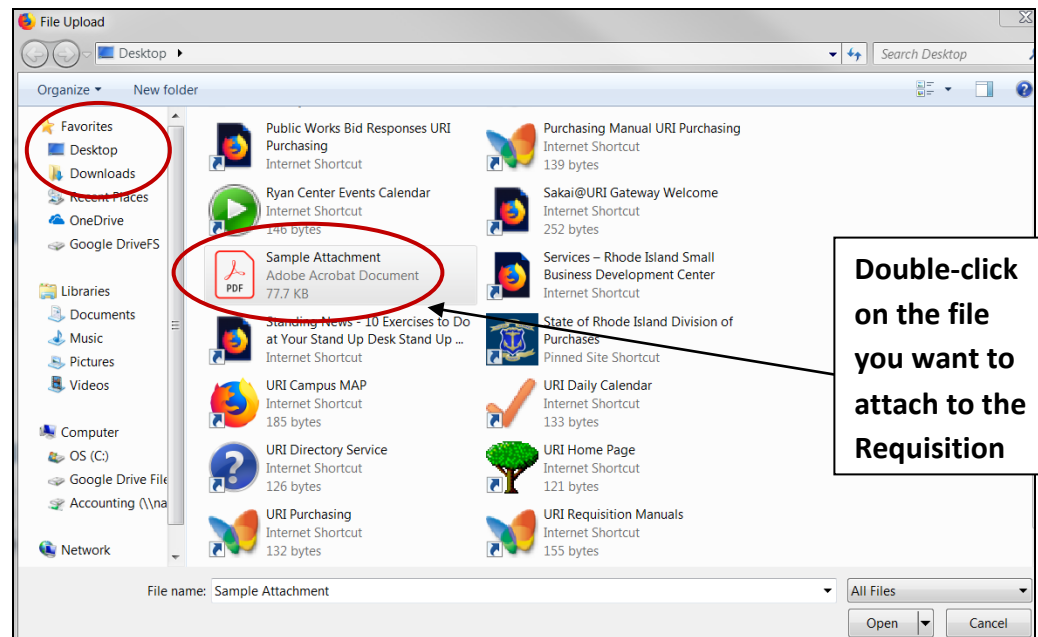
The name of the file will pop up in a window:
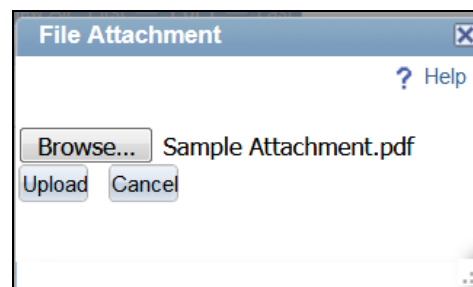
Click Upload **to attach the file**

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 Attachement 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.

Header Comments

Business Unit URIPS   Requisition Date 01/28/2019
Requisition ID 0000145729   Status Open

☑ Retrieve Active Comments Only   [Retrieve]

*Sort Method [Comment Time Stamp ▾]   *Sort Sequence [Ascending ▾]   [Sort]

Comments   Find | View 1   First ◄ 1-3 of 3 ► Last

Use Standard Comments   Comment Status Active   [Inactivate]   ➕

| See attached Single Source Justification Form |

☐ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document
Attachment Sample_Attachment.pdf   [Attach] [View] [Delete] ☐ Email

From -> REQ URIPS-0000145729

Use Standard Comments   Comment Status Active   [Inactivate]   ➕

| URI Capital Projects
c/o The Ryan Center
One Lincoln Almond Plaza
Kingston, RI 02881 |

☑ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document
Attachment   [Attach] [View] [Delete] ☐ Email

From -> REQ URIPS-0000145729

Use Standard Comments   Comment Status Active   [Inactivate]   ➕

| Current P.O. Amount $100,000.00
This Change $ 0.00
New P.O. Amount $100,000.00 |

☑ Send to Supplier   ☐ Show at Receipt
☐ Show at Voucher

Associated Document
Attachment   [Attach] [View] [Delete] ☐ Email

From -> REQ URIPS-0000145729

[OK] [Cancel] [Refresh]

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:

Message

This Requisition will be held from further processing (20001,42)

The Hold From Further Processing check box is currently on for this requisition. If your intention is to hold this requisition simply hit the OK button in this message box. If you would like to release this requisition, turn off the Hold From Further Processing check box and hit the save button.

OK

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:

Maintain Requisitions

Requisition

Business Unit	URIPS
Requisition ID	0000145729
Requisition Name	0000145729

Requires State Approval: ☐   [Resubmit]

Status Open

Budget Status Not Chk'd

Return: ☐   ☑ Hold From Further Processing

▼ Header ❓

*Requester kristenbellotti 🔍 Bellotti,Kristen
*Requisition Date 01/28/2019 📅 Requester Info
Origin CR 🔍 College Requisition
*Currency Code USD Dollar
Accounting Date 01/28/2019 📅

Requisition Defaults   Edit Comments
Requisition Activities
Document Status

Amount Summary ❓

Total Amount   5,001.00 USD

Add Items From ❓

Purchasing Kit	Catalog
Item Search	Requester Items

Select Lines To Display ❓

Search for Lines

Line [   ] 🔍 To [   ] 🔍 [Retrieve]

Line ❓   Personalize | Find | View All | 🔁 | 🔳 First ◄ 1-2 of 2 ► Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls

Line	Description		Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	📋	Advice of Change to PO📝🔳	🔳 1.0000	TOT 🔍	655A 🔍	1.00000	1.00	Open	💬	📖	🖼	➕	➖
2	📋	And increase CFS📝🔳	🔳 1.0000	TOT 🔍	655A 🔍	5,000.00000	5,000.00	Open	💬	📖	🖼	➕	➖

~~View Printable Version~~   *Go to ...More... [▼]

[💾 Save] [🔍 Return to Search] [📧 Notify] [🔄 Refresh]   [➕ Add]

This message may appear:

Click [Yes]

Message

Do you wish to save the current document? (10250,274)

Document cannot be printed if it is not saved. If you choose Yes, document will be saved and printed. If you choose No, document cannot be printed.

[Yes] [No]

The following message will appear:

Click [OK]

Message

This Requisition will be held from further processing (20001,42)

The Hold From Further Processing check box is currently on for this requisition. If your intention is to hold this requisition simply hit the OK button in this message box. If you would like to release this requisition, turn off the Hold From Further Processing check box and hit the save button.

[OK]

➢ **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 View Printable Version
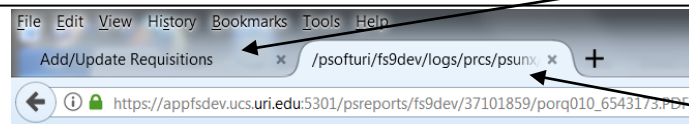
Tab 1 = Add/Update Reqs

Tab 2 = Printable Version of Req

File Edit View History Bookmarks Tools Help

Add/Update Requisitions × /psofturi/fs9dev/logs/prcs/psunx × +

https://appfsdev.ucs.uri.edu:5301/psreports/fs9dev/37101859/porq010_6543173.PDF

College Requisition
This Form is for Internal Use Only

Suggested Vendor Name: Dimeo Construction Co
Vendor Address: 75 Chapman St
Providence, RI 02905
Vendor#: 0000019684

Business Unit:	URIPS	OPEN
Date	Page	Req ID:
01/28/2019	1	0000145729
Requester	E-mail for Receiving Report
Bellotti,Kristen	kristenbellotti@discard.uri.edu
Requester Dept.	Phone #	Fax #
Research Purchasing	401/874-2325	401/874-2306

Ship To: URI Central Receiving
Kingston, RI 02881
Office of Capital Projects
60 Tootell Rd., Sherman Bldg.

Attachments: Y

Line Schd	Description	Quantity UOM	Price	Extended Amt	Due Date
1-1	Advice of Change to PO #106816 for an internal transfer of funds. Decrease CFS #9655-460-0000-0000-P000031-CONSTRUCTION in the amount of $5,000.00 for FY'19. Type in details about the transfer here if you need more info to explain	1.0000 TOT	1.0000	1.00	06/30/2019
2-1	And increase CFS #9655-144-0000-0000-P000020-CONSTRUCTION in the amount of $5,000.00 for FY'19.	1.0000 TOT	5,000.0000	5,000.00	06/30/2019

See attached Single Source Justification Form

URI Capital Projects
c/o The Ryan Center
One Lincoln Almond Plaza
Kingston, RI 02881

Current P.O. Amount $100,000.00
This Change $ 0.00
New P.O. Amount $100,000.00

Total Requisition Amount: 5,001.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2019	1-1-1	9655-460-0000-0000	P000031	CONSTRUCTION	1.00	
FY2019	2-1-1	9655-144-0000-0000	P000020	CONSTRUCTION	5,000.00	

For purchasing use only						
Buyer	Date	Type/Code	SR#		Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk	Date

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.

**The Print box
window comes
up; choose
where to Print
your
Requisition
and Click**

OK

Print

Printer

Name: HP LaserJet 3050 PCL5   Properties...

Status: Ready
Type: HP LaserJet 3050 PCL5
Where: DOT4_001
Comment: ☐ Print to file

Print range   Copies

◉ All   Number of copies: 1

○ Pages   from: 1   to: 1   ☑ Collate

○ Selection

OK   Cancel
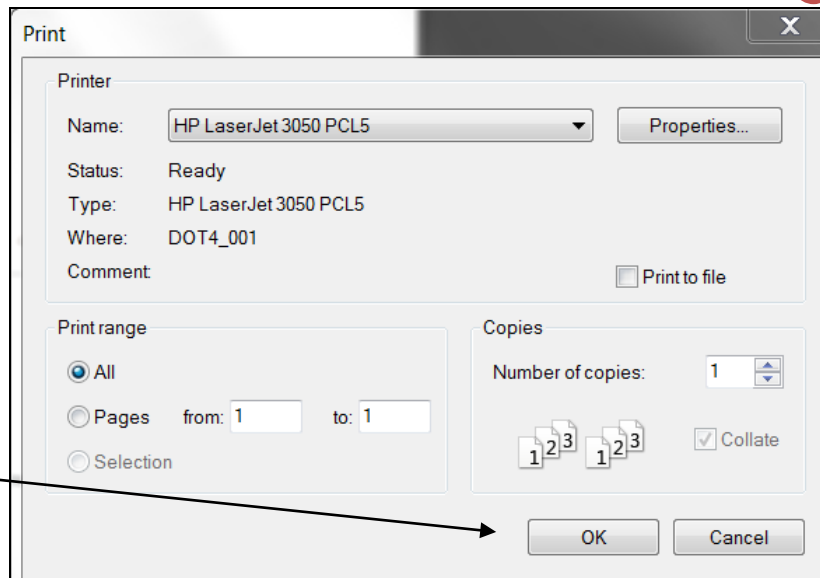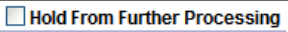
Once you have previewed and printed the Requisition, close the second window by clicking ☒ :
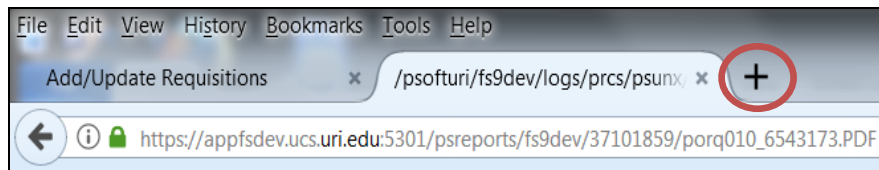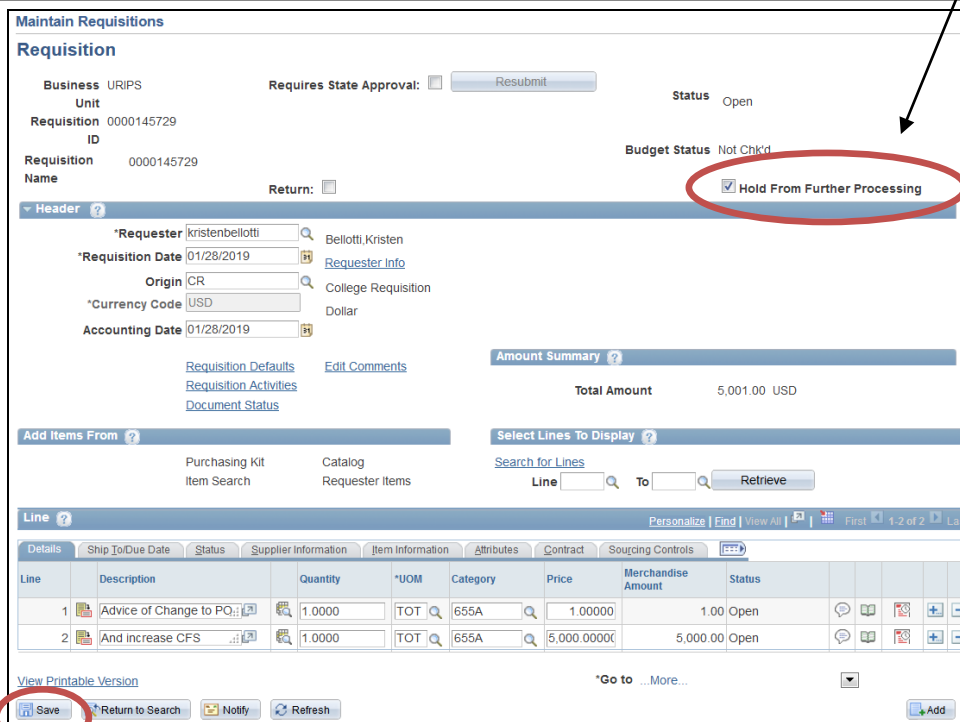
On the following pages, you will find instructions on how to proceed for both:
  ➢ **Originator (page 42); or**
  ➢ **Requester (page 43)**

➤ ORIGINATOR Procedures:

When the requisition is Complete and if you are an "Originator", uncheck the box and click 💾 Save :

☐ Hold From Further Processing

Note: 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 🖫 Save **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 01/26/2012 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):

Requisitions

Use the following search to look for an existing Requisition.

| Find an Existing Value | Add a New Value |

Click on the tab
Find an Existing Value

Search Criteria

Business Unit = URIPS
Enter the Requisition Number in the Requisition ID field
Requisition ID begins with
Requisition Status =
Requisition Date =
Origin begins with
Requester begins with
Requester Name begins with
Hold From Further Processing ☐
State Req Flag ☐
State Req Reference begins with
State Requisition Date =
☐ Case Sensitive

Click Search

Search   Clear   Basic Search   Save Search Criteria

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 :

Maintain Requisitions

Requisition

Business Unit: URIPS   Requires State Approval: ☐   Resubmit   Status: Approved
Requisition ID: 0000145713   **Budget Status: Error**
Requisition Name: 0000145713   Budget Status: Not Chk'd

Return: ☐   ☐ Hold From Further Processing

▼ **Header** ❓
*Requester: kristenbellotti   Bellotti,Kristen
*Requisition Date: 12/31/2018   Requester Info
Origin: CR   College Requisition
*Currency Code: USD   Dollar
Accounting Date: 12/31/2018

Requisition Defaults   Edit Comments
Requisition Activities
Document Status

Amount Summary ❓
Total Amount   3,500.00 USD

Add Items From ❓   **Select Lines To Display** ❓
Purchasing Kit   Catalog   Search for Lines
Item Search   Requester Items   Line ___ To ___   Retrieve

Line ❓   Personalize | Find | View All | First 1 of 1 Last

| Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls |

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	Convection Steamer	1.0000	EA	654A	3,500.00000	3,500.00	Pending			+	−

View Printable Version   *Go to ...More...

💾 Save   Return to Search   Notify   Refresh   Add

In this particular example, the Budget Error Exception is the result of "Exceeds Budget Tolerance"

| Requisition Exceptions | Line Exceptions |

Business Unit: URIPS   Requisition ID: 0000019883

*Exception Type: Error ▼   ☐ Override Transaction
Maximum Rows: 100   ☐ More Budgets Exist
Search   Advanced Budget Criteria

Budgets with Exceptions   Customize | Find | View All | First 1 of 1 Last

| Budget Override | Budget Chartfields |
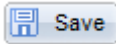
	Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1	🔍	URIPS	ORG	Exceeds Budget Tolerance	More Detail	☐	Go To ...

💾 Save   Return to Search   Notify
Requisition Exceptions | Line Exceptions

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.

Purchase Order 0000017110

URIPurchasing@uri.edu
Sent: Fri 9/10/2010 9:48 AM
To: betty@uri.edu

✉ Message 📄 PO_0000017110_00017818.PDF (90 KB)

```
This e-mail is to notify you that Purchase Order 0000017110 from the University of Rhode Island has
been issued.  To view the purchase order, click on the PDF file attached to this e-mail.  If you have
any questions please contact the URI Purchasing Department at 401-874-2171.


THIS IS A SYSTEM GENERATED E-MAIL.   PLEASE DO NOT REPLY
```

➢ **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.

```
From: URIPurchasing@uri.edu [mailto:URIPurchasing@uri.edu]
Sent: Monday, April 05, 2010 1:46 PM
To: kevinbanks@uri.edu
Subject: College Requisition: 0000000405 Has Been Returned By URI Purchasing Department

This e-mail is to notify you that College Requisition: 0000000405, has been returned by the URI Purchasing Department for the following reason(s):
Please attach detailed specifications.
```

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 Resubmit **. 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.

Yes   No

1. **Click** Yes

2. **Click** Save
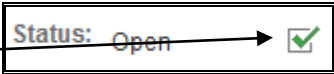
3. **Uncheck** ☑ Hold From Further Processing

   Status: Open   ☑ △
   Budget Status: Not Chk'd

   ☐ Hold From Further Processing

4. **Click on** ☑   Status: 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:

Maintain Requisitions

Requisition

Business Unit: URIPS   Requires State Approval: ☐   [Resubmit]   Status: Approved   △ ✕
Requisition ID: 0000070803   Budget Status: Valid
Requisition Name: 0000070803

Track Batch: 4   Return: ☑   SeqNum: 10   Please attach detailed   [Notify]   ☐ Hold From Further Processing
                                                  specifications. Thank you, Betty

▼ Header

*Requester: kgennari   Gennari,Kathyrn   Requisition Defaults
*Requisition Date: 01/12/2015   Requester Info   Edit Comments
                                                   Requisition Activities
Origin: CR   College Requisition   Document Status
*Currency Code: USD   Dollar
                                                   Amount Summary
*Accounting Date: 01/12/2015   Total Amount: 12,000.00
                                                    Pre-Encumbrance Balance: 12000.0

Add Items From   **Select Lines To Display**
Purchasing Kit   Catalog   Line: ___ To: ___   [Retrieve]
Item Search   Requester Items

Line   Personalize | Find | View All

Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Description	Quantity	*UOM	Category	Price	Amount	Status
1	TEST	2.0000	EA	323A	6,000.0000	12,000.00	Approved

View Printable Version   *Go to: ...More...

[Save] [Return to Search] [Notify] [Refresh]   [Add] [Update/Display]

> **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 ✕.**

This message will appear:

Message

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.

[Yes]   [No]

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** ☑ 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

Business Unit URIPS		**Requisition Date** 01/28/2019	
Requisition ID 0000145729		**Status** Open	

Default Options ❓

○ **Default**   If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

◉ **Override**   If you select this option, all default values entered on this page override the default values found in the default hierarchy only non-blank values are assigned.

Line

Buyer		**Unit of Measure**	
Supplier 0000019684 — Dimeo Construction Co		**Supplier Location** MAIN	
Category 655A		Supplier Lookup	

Schedule

Ship To 4046_001_B — Capital Projects   ***Distribute By** Amount

→ **Original Ship To code**

Due Date 06/30/2019

Ultimate Use Code   **Ship Via** BEST WAY

    Freight Terms FOB DEST

One Time Address

Distribution

SpeedChart

Distributions

| Details | Asset Information |

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project
1		URIPS							

[**OK**] [Cancel] [Refresh]

Type in the New Ship To code:

Ship To: 4058_001_S — Central Receiving

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.....

| Business Unit | URIPS | | Requisition Date | 01/28/2019 |
| Requisition ID | 0000145729 | | Status | Open |

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 Distribs' to apply changes to all distribution lines on the requisition.

☑ Mark All   ☐ Unmark All

Retrofit Field Selection   Personalize | Find | View All | 🔲 | 🔳 First 1-2 of 2 Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
☐		Ship To	4058_001_S	
☐	1	GL Unit	URIPS	☐

[OK]   [Cancel]   [Refresh]

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.....

| Business Unit | URIPS | | Requisition Date | 01/28/2019 |
| Requisition ID | 0000145729 | | Status | Open |

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 Distribs' to apply changes to all distribution lines on the requisition.

☑ Mark All   ☐ Unmark All

Retrofit Field Selection   Personalize | Find | View All | 🔲 | 🔳 First 1-2 of 2 Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
☑		Ship To	4058_001_S	
☑	1	GL Unit	URIPS	☐

[OK]   [Cancel]   [Refresh]

On the Main Requisition screen, click 🖫 Save to save your changes:

Requisition

Business Unit URIPS	**Requires State Approval:** ☐	Resubmit	**Status** Open
Requisition ID 0000145729			**Budget Status** Not Chk'd
Requisition Name 0000145729			
	Return: ☐		☑ Hold From Further Processing

▼ Header ❓

*Requester kristenbellotti 🔍	Bellotti,Kristen
*Requisition Date 01/28/2019 📅	Requester Info
Origin CR 🔍	College Requisition
*Currency Code USD	Dollar
Accounting Date 01/28/2019 📅	

Requisition Defaults   Edit Comments
Requisition Activities
Document Status

Amount Summary ❓

Total Amount   5,001.00 USD

Add Items From ❓

Purchasing Kit	Catalog
Item Search	Requester Items

Select Lines To Display ❓

Search for Lines
Line [____] 🔍 To [____] 🔍 [Retrieve]

Line ❓

Personalize | Find | View All | 🔲 | First ◀ 1-2 of 2 ▶ Last

Tabs: **Details** | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	Advice of Change to PO	1.0000	TOT 🔍	655A 🔍	1.00000	1.00	Open	💬	📖	📅	➕	➖
2	And increase CFS	1.0000	TOT 🔍	655A 🔍	5,000.00000	5,000.00	Open	💬	📖	📅	➕	➖

View Printable Version

*Go to ...More...   [▼]

🖫 Save   Return to Search   📧 Notify   🔄 Refresh   Add