

# **PeopleSoft Purchasing College Requisition (CR)**

## **Blanket (multiple deliveries/multiple payments)**



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## ➤ **Small Delegated Purchase Authority**

In accordance with Rhode Island General Laws § 37-2-22, Small Purchases not to exceed an aggregate amount of five thousand dollars (\$5,000) may be made in accordance with Small Purchase Regulations promulgated by the Chief Purchasing Officer. Note: The \$5,000 limitation must include all costs relating to a purchase, ie. shipping & handling. A complete version of URI Purchasing Policies and Procedures is available at <https://web.uri.edu/purchasing/>. Procurements shall not be artificially divided so as to constitute a Small Purchase. When obtaining quotes, we recommend you provide written solicitations to all Supplier(s) in order to clarify your request and secure the best price.

### For Non-Research Funds:

- Purchases up to \$500 – For general procurements up to \$500, quotations are not required; however, quotations are encouraged.
- Purchases > \$500 to \$2,500 – For general procurements greater than \$500 to \$2,500 per transaction, three (3) telephone quotes must be obtained prior to procurement.
- Purchases > \$2,500 to \$5,000 – For general procurements greater than \$2,500 to \$5,000 per transaction, three (3) written quotes must be obtained (fax, email, mail, web quote, etc.) prior to procurement.

### For Research Funds (Fund 110, 126 and 500):

- For general procurements up to \$5,000 quotations are not required; however, they are encouraged.

Internal Vendors – URI Printing Services, Dining Services, Central Stores, etc. should be utilized by processing an Internal Vendor (IV) PO before seeking like services or merchandise from outside Suppliers.

Master Price Agreements – The Small Delegated Purchase Authority does not replace the requirement to utilize Master Price Agreements (MPA) when one is available for the purchase and when the MPA price is less expensive. Master Price Agreements can be downloaded from the Division of Purchases website at <http://www.purchasing.ri.gov/MPA/MPASearch.aspx>.

Correctional Industries Products and Services – The Small Delegated Purchase Authority does not replace the requirement to utilize Correctional Industries products and services when they are available. For information and help in using Correctional Industries, please visit their website at: <http://www.doc.ri.gov/industries/index.php> or call 401-462-1441.

MBE Participation – State Purchasing Regulations require that at least one of the 3 quotes must be solicited from a certified minority or woman-owned business supplier if one is available. Lists of certified MBEs are available at <http://odeo.ri.gov/offices/mbeco/>.

Documentation – All documentation of quotes must be attached to the on-line requisition and be retained by the department along with a copy of the purchase order.

Accountability – If it is determined that there has been an abuse of the regulations or the University's financial policy and procedures, the individual and/or the department will be required to designate and authorize private and/or personal funds to pay for the improper purchase(s). After confirming abuses, use of LVPOs will be removed from the department for an appropriate time frame.

## ➤ 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 Supplier, 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

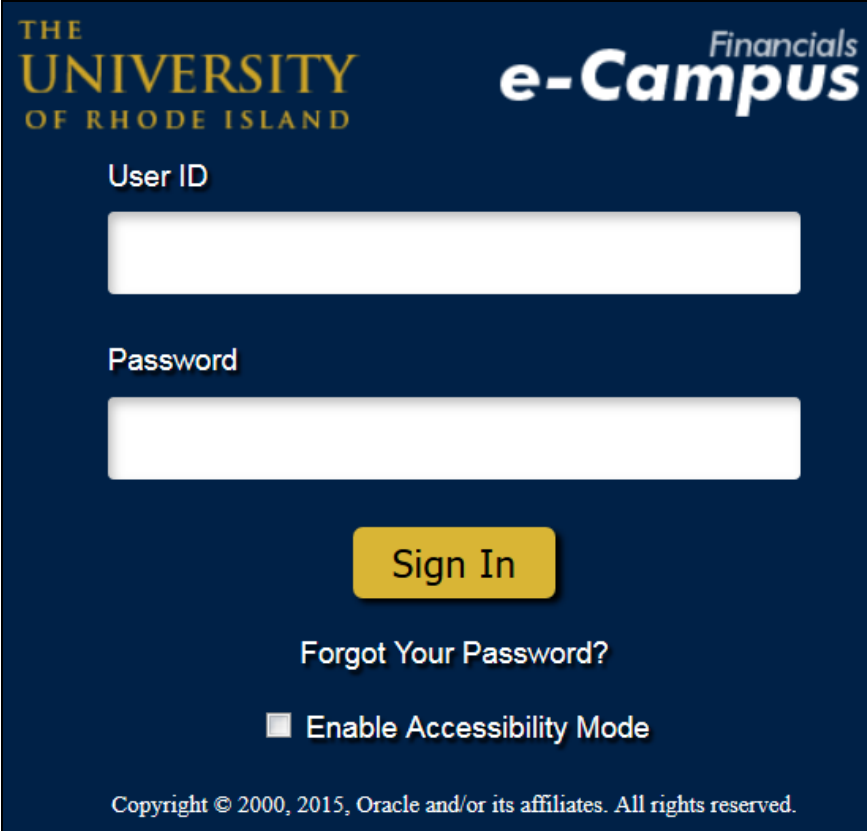
PeopleSoft is to be used in accordance with the URI Access and Compliance Data Confidentiality Statement.

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:

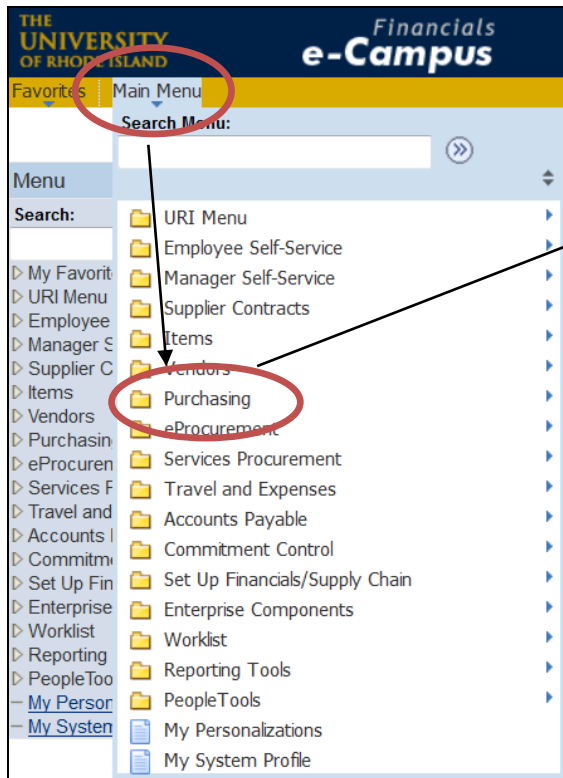
<https://appfsprod.uri.edu:9301/psp/fsprod/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&>



The image shows the login page for The University of Rhode Island's e-Campus Financials system. The page has a dark blue background. At the top left, the text "THE UNIVERSITY OF RHODE ISLAND" is displayed in gold. At the top right, the text "Financials e-Campus" is displayed in white. Below the university name, there are two white input fields: one for "User ID" and one for "Password". Below the password field is a yellow "Sign In" button. Below the button is a link that says "Forgot Your Password?". Below that is a checkbox labeled "Enable Accessibility Mode". At the bottom of the page, there is a copyright notice: "Copyright © 2000, 2015, Oracle and/or its affiliates. All rights reserved."

## ➤ To Add a New Requisition

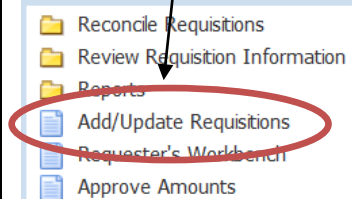
From the Main Menu, choose Purchasing:



Then choose  
Requisitions:



Then choose Add/Update  
Requisitions:



To add a new Requisition, Click  :

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;

Click the  and Select CR ;

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

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition NEXT      ID      Budget Status Not Chk'd

Requisition Name      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



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:** A College Requisition (CR) does not require a Supplier, however, if you have a suggested Supplier and the Supplier is in PeopleSoft you may select the Supplier. If the Supplier is not in PeopleSoft you can enter the suggested Supplier name and address in the Requisition Header Comment section, which will be discussed later.

**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        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	<input type="text"/>	URIPS 	<input type="text"/>	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/>	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 

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 .

**Supplier Search**

**Search Criteria**

Name  Short Name

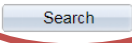
Alternate Supp Name


City  State




Country  Postal

Class  Type

Max Rows








**Search Results**  Personalize Find View All   First 1 of 1 Last

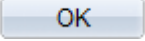
Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>						

Supplier Detail Address

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 

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

**Supplier Search**

**Search Criteria**

Name  Short Name

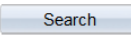
Alternate Supp Name


City  State




Country  Postal

Class  Type

Max Rows







1 to 4 of 4 

**Search Results**  Personalize Find View All   First 1 of 4 Last


Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>	000005814	MAIN	2	SANTACRUZB-001	Santa Cruz Biotechnology Inc	N
<input type="checkbox"/>	000009277	MAIN	1	SANTABUCKL-001	Santa Buckley Energy Inc	N
<input type="checkbox"/>	0000046347	MAIN	1	SANTANAC-002	Santana, Cesar	Y
<input type="checkbox"/>	0000058424	MAIN	1	SANTAGATAM-001	Santagata, Matthew	N

Supplier Detail **Address**

 Click here to preview address

## ➤ Choose a Category

**Category** – is a classification of goods/services. For example, if you are requisitioning Natural Gas, the category is “Fuel: Gas”. The Category will populate the account; i.e. Category 406A = Account 5406 . Choose the appropriate Category based on the goods/services you are requisitioning -- Click on the  to choose the correct Category.

**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 20.](#)

**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 0000009277  Santa Buckley Energy Inc Supplier Location MAIN   
 Category     [Supplier Lookup](#)

**Schedule**


Ship To  \*Distribute By Amount   
 Due Date  31  
 Ultimate Use Code  Ship Via BEST WAY   
 Attention To  Freight Terms FOB DEST 








One Time Address

**Distribution**

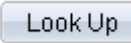
SpeedChart

**Distributions**


Details Asset Information 

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

OK Cancel Refresh

Search by either the Category Number (i.e.: 406) or Description (i.e.: Fuel) and click  or Select from the “Search Results”.

*Within the Search Results you may also change the order in which a column sorts by clicking on the Column Heading (i.e.: click on Description to sort in alphabetical order by the Description).*



### Look Up

#### Look Up Category

**SetID:** begins with   
**Category:** begins with   
**Description:** begins with

[Basic Lookup](#)

**"Search Results"**

[View 100](#)

SetID	Category	Description	Category Comments
URIPS 000		Miscellaneous	(blank)
URIPS 000X		Agric, Horti, Fishery Supplies	(blank)
URIPS 200		Clothing, Apparel, Uniforms	(blank)
URIPS 261A		Medical Services - Other	Health care services (ex: doc
URIPS 261B		Pre-Employment Physicals	Pre-employment physicals fo
URIPS 262A		A & E Svcs <\$50K	Architectural/engineering, en
URIPS 263A		Education/Prof/Artistic Svcs	Educational, professional, arti

### Example of Search by Description

Type the Description (i.e.: Equip) and click

Select the appropriate Category from the Search Results by clicking on the correct Category Number

### Look Up Category

**SetID** begins with   
**Category** begins with   
**Description** begins with

[Basic Lookup](#)

**Search Results**

[View 100](#)

SetID	Category	Description	Category Comments
URIPS 406A		Fuel: Gas	Pipeline or bottled gas used for heating structure
URIPS 402A		Fuel: Oil #2	Home heating oil for heating structures and hot v

### Note:

You can also search Category and Description by using the

pull down menu. Your choices are:

begins with

contains

=

not =

<

<=

>



>=

between

in

## ➤ 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 01/14/2019  
 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 0000009277 Santa Buckley Energy Inc Supplier Location MAIN  
 Category 406A [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	<input type="text"/>	URIPS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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 31](#).

➤ Due Date

DO NOT enter the Due Date here. The Due Date will be entered on the line. [See page 24.](#)

➤ Distribute By

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

➤ Distributions

DO NOT enter the Distribution(s) here. The Distribution(s) will be entered on the line. [See page 16.](#)

**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 0000009277  Santa Buckley Energy Inc Supplier Location MAIN   
Category 406A  [Supplier Lookup](#)

**Schedule**

Ship To 4040\_001\_B  Facilities Services **\*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	<input type="text"/>	URIPS <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Click  when done. You will be returned to the Main Requisition page.

## ➤ Line Items

**On the main Requisition page:**

**Description** – The Description for Blanket Requisitions is the Fiscal Year. If this is a multi-year Blanket Requisition, each Fiscal Year will be a separate line item.

Type as: Fiscal Year 2018/2019

An actual Description of the item(s) being ordered will be typed in a Comment field later. [See page 31.](#)

**Exception:** When using Fund 500, the Description will be the actual Description of the goods/services.

**Maintain Requisitions**

**Requisition**

Business: URIPS      Requires State Approval: ☐      Resubmit      Status: Open

Unit:      Requisition ID: NEXT      Budget Status: Not Chk'd

Requisition Name:      Return: ☐      ☒ Hold From Further Processing

[Copy From](#)

**Header**

\*Requester: kristenbellotti      Bellotti, Kristen

\*Requisition Date: 01/15/2019      [Requester Info](#)

Origin: CR      College Requisition

\*Currency Code: USD      Dollar

Accounting Date: 01/15/2019

[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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	0.0000			0	0.00	Open

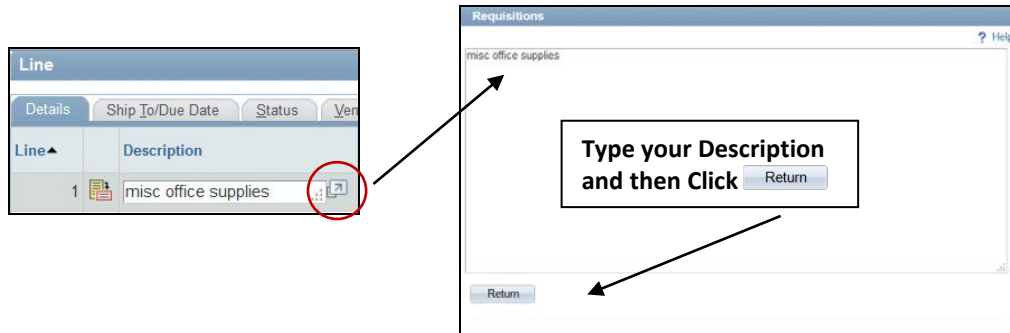
[View Printable Version](#)      \*Go to ...More...

Save      Notify      Refresh      Add

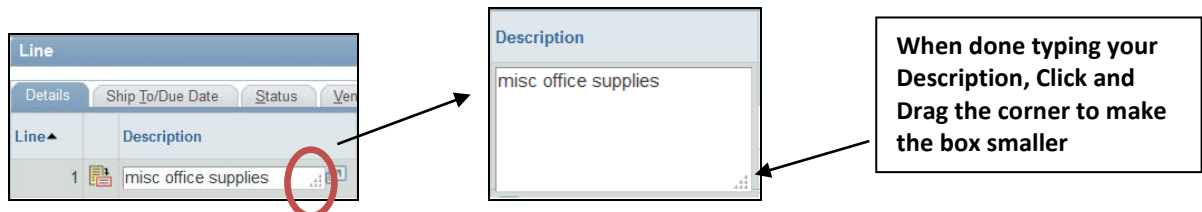


**There are 4 ways to enter the Line Item Description:**

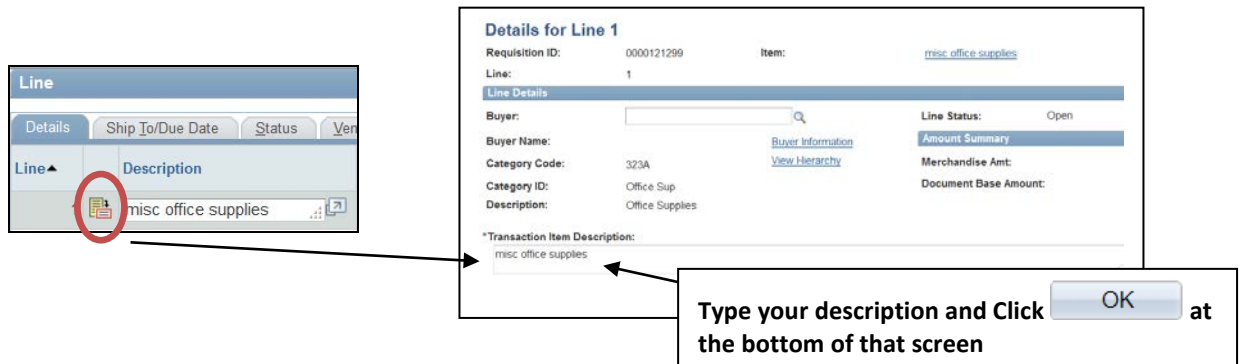
**1 – Click on the  at the end of the Description to access the entire Description area:**



**2 - Expand the  box at the end of the Description by Clicking and Dragging it and type in your Description:**




**3 – Click the  icon to the left of the Description. This will take you to the Details for Line screen:**



**4 - If additional information needs to be added, it can be added as a Line Comment (*See below*):**

## ➤ 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 Unit: NEXT  
 ID: [blank]  
 Requisition Name: [blank]

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: 01/15/2019 [Requester Info](#)  
 Origin: CR College Requisition  
 \*Currency Code: USD Dollar  
 Accounting Date: 01/15/2019

[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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	0.0000			0	0.00	Open

[View Printable Version](#) \*Go to ...More...

[Save](#) [Notify](#) [Refresh](#) [Add](#)



**DO NOT ATTACH ANY ATTACHMENTS TO A LINE COMMENT.**

To add an attachment, follow the instructions on Page 37.

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: 01/14/2019  
 Requisition ID: NEXT Status: Open Line: 1

\*Sort Method: Comment Time Stamp \*Sort Sequence: Ascending [Sort](#)

**Comments** Find | View All | First 1 of 1 Last

[Use Standard Comments](#) [Use Item Specifications](#) Comment Status: Active [Inactivate](#) [+](#)

Type in details about the fuel here.

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

**Associated Document**

Attachment	Attach	View	Delete	Email
From -> REQ URIPS-NEXT				

[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 URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition NEXT      ID      Budget Status Not Chk'd

Requisition Name      Copy From      Return: ☐      ☒ Hold From Further Processing

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen  
 \*Requisition Date 01/15/2019      Requisition Info  
 Origin CR      College Requisition  
 \*Currency Code USD      Dollar  
 Accounting Date 01/15/2019

Requisition Defaults      Add Comments      Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit      Catalog  
 Item Search      Requester Items

**Line** ?      Personalize | Find | View All | Print | 1 of 1 | Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	0.0000		406A	0	0.00	Open

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

## ➤ Quantity

Type the Quantity of that item - **Note** - the Quantity for Blanket Requisitions is typically 1:

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition NEXT      ID      Budget Status Not Chk'd

Requisition Name      Copy From      Return: ☐      ☒ Hold From Further Processing

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen  
 \*Requisition Date 01/15/2019      Requisition Info  
 Origin CR      College Requisition  
 \*Currency Code USD      Dollar  
 Accounting Date 01/15/2019

Requisition Defaults      Add Comments      Amount Summary ?

Total Amount 0.00 USD

Add Items From ?


Purchasing Kit      Catalog  
 Item Search      Requester Items

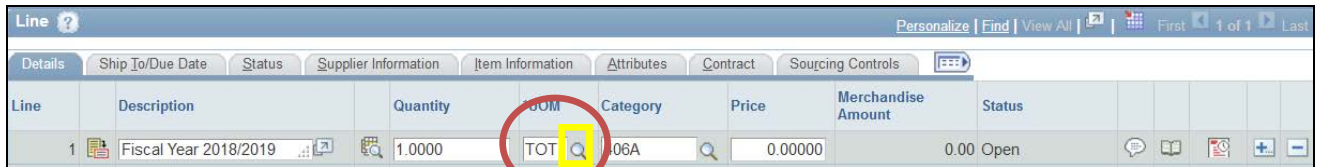
**Line** ?      Personalize | Find | View All | Print | 1 of 1 | Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000		406A	0.00000	0.00	Open

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

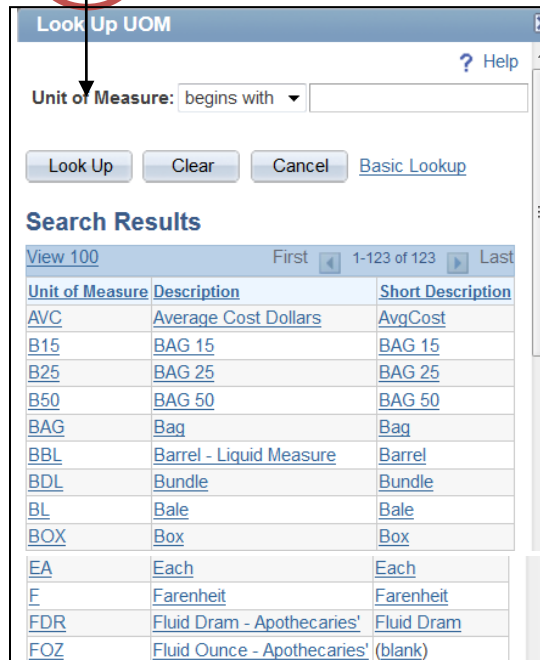
## ➤ Unit of Measure

Enter the Unit of Measure - UOM (i.e.: EA, TOT, or click  to Search. The Unit of Measure for a Blanket Requisition is typically TOT = Total.



The screenshot shows a requisition line item with the following details:

Line	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	06A	0.00000	0.00	Open



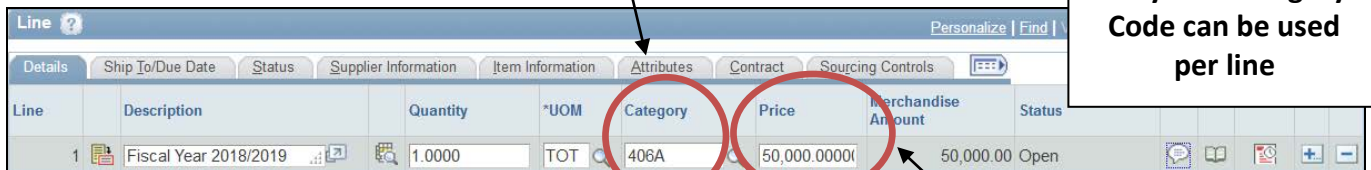
The 'Look Up UOM' dialog box is shown with the 'Unit of Measure' set to 'begins with'. The search results are as follows:

Unit of Measure	Description	Short Description
AVC	Average Cost Dollars	AvgCost
B15	BAG 15	BAG 15
B25	BAG 25	BAG 25
B50	BAG 50	BAG 50
BAG	Bag	Bag
BBL	Barrel - Liquid Measure	Barrel
BDL	Bundle	Bundle
BL	Bale	Bale
BOX	Box	Box
EA	Each	Each
F	Fahrenheit	Fahrenheit
FDR	Fluid Dram - Apothecaries'	Fluid Dram
FOZ	Fluid Ounce - Apothecaries'	(blank)

Select from the Search Results

## ➤ Category

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



The screenshot shows the requisition line item with the following details:

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.00000	50,000.00	Open

**REMINDER:**  
Only one Category Code can be used per line

Enter the Unit Price for the item. You only need to use a decimal when the Unit Price is in dollars and cents.

## ➤ Price



The screenshot shows the requisition line item with the following details:

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.00000	50,000.00	Open

At the end of the line, Click the Schedule icon - .

➤ **Ship To**

Defaults from the Requisition Defaults page:

**Maintain Requisitions**

**Schedule**

Business Unit: URIPS      Requisition Date: 01/14/2019  
Requisition ID: NEXT      Status: Open  
[Return to Main Page](#)

Line	Item	Fiscal Year 2018/2019	Quantity	1.0000	Total	Merchandise Amt	50,000.00	USD
<b>Schedule</b> <span>Personalize   Find   View All   First   1 of 1   Last</span>								
<b>Details</b> <span>Details</span>								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	4040_0	K	1.0000	50,000.0000C	50,000.00		Bellotti, Kristen	Active


[Add Ship To Comments](#)

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

➤ **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**

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 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**

## ➤ Change the Ship To Comments

If you would like the shipment to be addressed to a particular individual, Click the

[Add Ship To Comments](#)

hyperlink. **Note:** This action is performed once on Line 1/Schedule 1 only.

**Maintain Requisitions**

**Schedule**

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

[Return to Main Page](#)

Line	Item	Fiscal Year 2018/2019	Quantity	1.0000	Total	Merchandise Amt	50,000.00	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	4040_0	K	1.0000	50,000.00000	50,000.00		Bellotti, Kristen	Active

[Add Ship To Comments](#)

Save Notify Refresh Add Update/Display

**\*\* If you have chosen an OFFSITE Ship To Location, do not access the [Add/Edit Comments](#)**

- **Note:** The Ship To chosen on the Requisition Defaults page will be the only default choice.
- In the Comment Box type the name only of the individual/room/lab that the shipment should be addressed to.
- When done, Click

**Requisition Ship To Comments**

Business Unit URIPS Requisition Date 01/15/2019  
 Requisition ID NEXT Status Open

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

Comments

Use Standard Comments Ship To 4040\_001\_B Comment Status Active Inactivate

Ramsey Lab

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

**Associated Document**

Attachment Attach View Delete Email

From -> REQ URIPS-NEXT

OK Cancel Refresh

When the PO is printed, the Ship To address will look like this:

**Ship To:** URI Central Receiving  
Kingston, RI 02881  
CMB CBLS  
120 Flagg Rd., Room 098  
**Attention:** Ramsey Lab

PeopleSoft automatically adds the word "Attention".

**You will then be returned to the Maintain Requisitions – Schedule page:**

**Maintain Requisitions**

**Schedule**

Business Unit: URIPS      Requisition Date: 01/15/2019  
Requisition ID: NEXT      Status: Open

[Return to Main Page](#)

Line	Item	Fiscal Year 2018/2019	Quantity	1.0000	Total	Merchandise Amt	50,000.00	USD
<b>Schedule</b>								
<a href="#">Details</a>								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	4040_0	K	1.0000	50,000.00000	50,000.00	06/30/2019	Bellotti, Kristen	Active

[Add/Edit Comments](#)


[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

➤ **Due Date**

**Due Date** – The Due Date for a Blanket Requisition is the end date of the Blanket within a given Fiscal Year.

**Remember** : each Fiscal Year is a separate Line Item; therefore, the Due Date is the end date for each particular line.

Type the Due Date or select a date by clicking .

Next, Click on the  Distribution icon.



**This 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.

OK

Click

OK

### ➤ Entering Distributions on the Line

When Distributing by more than one ChartField String, Click  to add the desired number of rows:

Maintain Requisitions

**Distribution**

Requisition ID: NEXT  
Line: 1  
Schedule: 1  
Step To: 4040\_001\_B  
Facilities:   
Distribute By: Amount  
SpeedChart:   
Multi-SpeedCharts

Item:   
Status: Active  
Fiscal Year: 2018/2019  
Quantity: 1.0000 TOT  
Open Amount: 50,000.00  
Merchandise Amt: 50,000.00 USD

Distributions

ChartFields	Details	Asset Information	Budget Information	PTT													
Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bed Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	100.0000	50,000.00	JURPS	01/15/2019	5406											

OK Cancel Refresh

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 #**

**Maintain Requisitions**  
**Distribution**

Requisition ID: NEXT  
 Line: 1  
 Schedule: 1  
 Ship To: 4040\_001\_B  
 Facilities:   
 \*Distribute By: Amount  
 SpeedChart:   
 Item Status: Active  
 Fiscal Year: 2018/2019  
 Quantity: 1.0000 TOT  
 Open Amount: 50,000.000  
 Merchandise Amt: 50,000.00 USD

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	100.0000	50,000.00	URIPS	01/15/2019	5406											
2	Open		0.00	URIPS	01/15/2019	5406											

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 .

**Maintain Requisitions**  
**Distribution**

Requisition ID: NEXT  
 Line: 1  
 Schedule: 1  
 Ship To: 4040\_001\_B  
 Facilities:   
 \*Distribute By: Amount  
 SpeedChart:   
 Item Status: Active  
 Fiscal Year: 2018/2019  
 Quantity: 1.0000 TOT  
 Open Amount: 50,000.000  
 Merchandise Amt: 50,000.00 USD

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	50.0000	25,000.00	URIPS	01/15/2019	5406	100	4055	0000								
2	Open	50.0000	25,000.00	URIPS	01/15/2019	5406	110	4081	0000								

**Note:** The Budget Date defaults to the current date and will need to be changed in order to pre-encumber the funds in the appropriate Fiscal Year. The Budget Date for a Blanket Requisition is the end date for each Fiscal Year. For example, Line 1 is FY 18-19, the Budget Date for each Distribution Line 1 will be 6/30/19:

**Maintain Requisitions**  
**Distribution**

Requisition ID: NEXT  
 Line: 1  
 Schedule: 1  
 Ship To: 4040\_001\_B  
 Facilities:   
 \*Distribute By: Amount  
 SpeedChart:   
 Item Status: Active  
 Fiscal Year: 2018/2019  
 Quantity: 1.0000 TOT  
 Open Amount: 50,000.000  
 Merchandise Amt: 50,000.00 USD

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affiliate
1	Open	50.0000	25,000.00	URIPS	06/30/2019	5406	100	4055	0000								
2	Open	50.0000	25,000.00	URIPS	06/30/2019	5406	110	4081	0000								



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 29.](#)

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

**When you are done entering all of the ChartField Strings, Dates and Lines in Distributions,**

Click  to return to the Schedule page:

### ➤ Return to Schedule Page

Click the hyperlink [Return to Main Page](#) :



**Maintain Requisitions**

**Schedule**

Business Unit URIPS Requisition Date 01/15/2019  
Requisition ID NEXT Status Open

[Return to Main Page](#)

Line

1	Item	Fiscal Year 2018/2019	Quantity	1.0000	Total	Merchandise Amt	50,000.00	USD
<b>Schedule</b>								
Personalize   Find   View All   First 1 of 1 Last								
<b>Details</b>								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	4040_0	K	1.0000	50,000.00000	50,000.00	06/30/2019	Bellotti, Kristen	Active

Add/Edit Comments

Save Notify Refresh Add Update/Display

This will return you to the Maintain Requisitions page:

**Maintain Requisitions**

**Requisition**

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

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen  
\*Requisition Date 01/15/2019      Requisition Info  
Origin CR      College Requisition  
\*Currency Code USD      Dollar  
Accounting Date 01/15/2019        
Requisition Defaults      Add Comments      Amount Summary ?  
Requisition Activities       
Total Amount 50,000.00 USD

**Add Items From** ?

Purchasing Kit      Catalog  
Item Search      Requester Items

**Line** ?

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.0000	50,000.00	Open

Save      Notify      Refresh      \*Go to ...More...      Add

When all lines are complete, Click  Save .

To add additional Line Items, see page 29. 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.

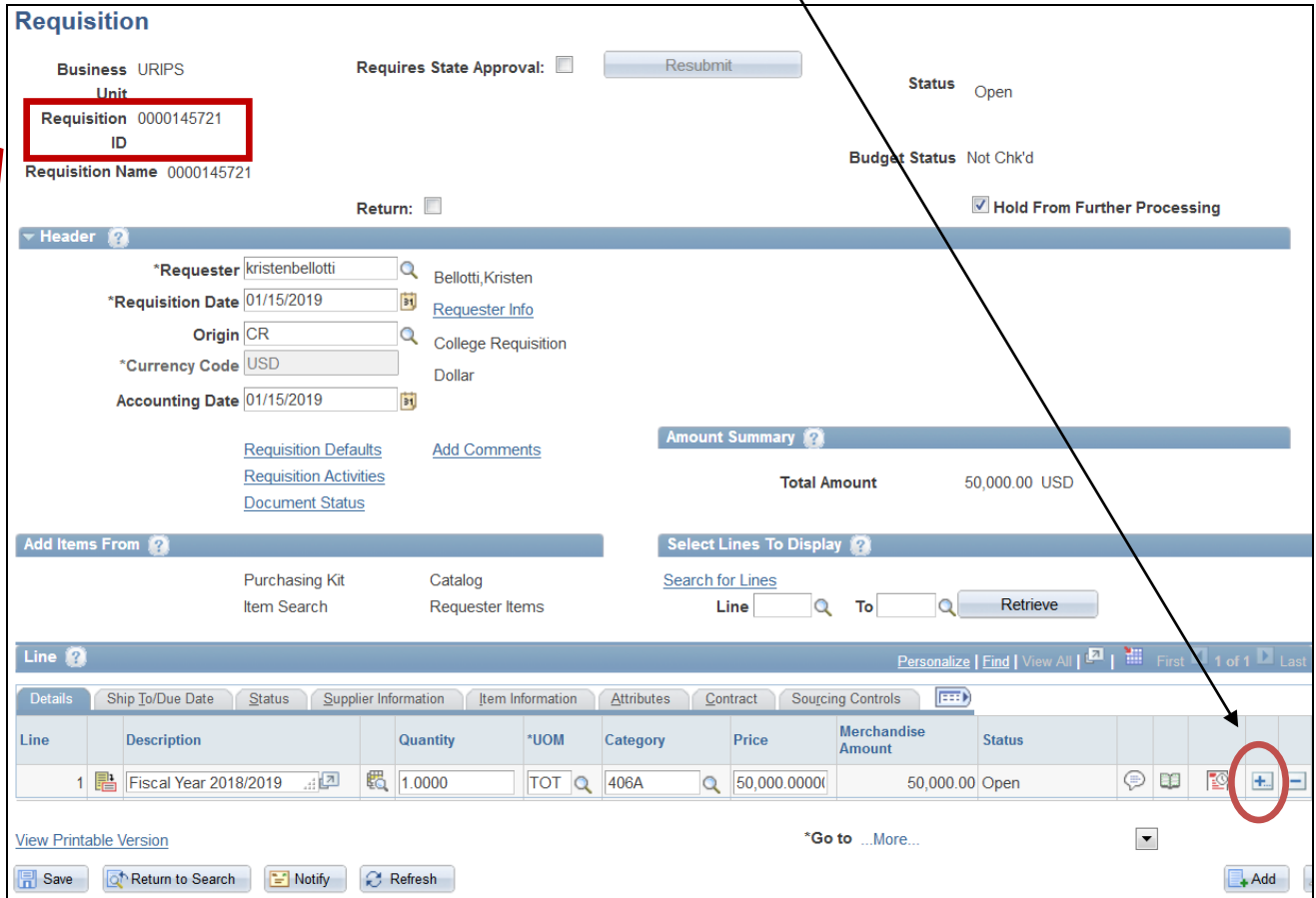
OK

Click 

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)

## ➤ To Add Additional Line Items

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



**Requisition**

Business Unit: URIPS  
Requisition ID: 0000145721  
Requisition Name: 0000145721

Requires State Approval: ☐ Resubmit  
Status: Open  
Budget Status: Not Chk'd  
Hold From Further Processing: ☒

Return: ☐

**Header**

\*Requester: kristenbellotti Bellotti, Kristen  
\*Requisition Date: 01/15/2019 Requester Info  
Origin: CR College Requisition  
\*Currency Code: USD Dollar  
Accounting Date: 01/15/2019

Requisition Defaults  
Requisition Activities  
Document Status

Amount Summary  
Total Amount: 50,000.00 USD

Add Items From: Purchasing Kit, Catalog, Item Search, Requester Items

Select Lines To Display  
Search for Lines  
Line: To: Retrieve

**Line**

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.0000	50,000.00	Open

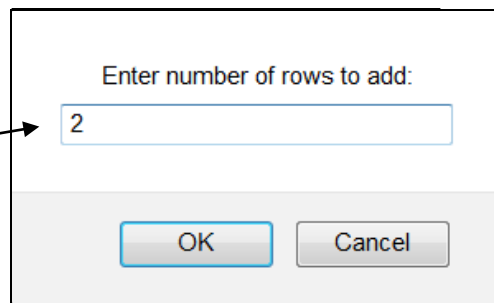
View Printable Version  
\*Go to ...More...  
Save Return to Search Notify Refresh Add

Enter the desired number of rows (lines) to add.

For example: if the Requisition is for a total of 3 lines, enter 2.

Click .

Two blank lines will be added to the PO



Enter number of rows to add:

2

OK Cancel

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition ID 0000145721      Budget Status Not Chk'd

Requisition Name 0000145721      Return: ☐      ☒ Hold From Further Processing

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen  
 \*Requisition Date 01/15/2019      Requester Info  
 Origin CR      College Requisition  
 \*Currency Code USD      Dollar  
 Accounting Date 01/15/2019

[Requisition Defaults](#)      [Add Comments](#)      **Amount Summary** ?

[Requisition Activities](#)      Total Amount 50,000.00 USD  
[Document Status](#)

**Add Items From** ?      **Select Lines To Display** ?

Purchasing Kit      Catalog      Search for Lines  
 Item Search      Requester Items      Line      To      Retrieve

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.0000	50,000.00	Open					
2		0.0000			0	0.00	Open					
3		0.0000			0	0.00	Open					

**Note:** the Category Code will automatically populate from the Requisition Defaults page once you have entered a Description - DO NOT CHANGE.

- Remember to click on the Schedule icon and the Distribution icon to continue adding the correct Ship To Control, ChartField String and Due Date for each additional line.

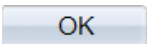
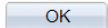
If there are no more Line Items to add, click  Save at the bottom of the screen.

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.

Click  

## ➤ Adding Header Comments

To add a Header Comment(s), Click on the hyperlink [Add Comments](#) :

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition 0000145721      Budget Status Not Chk'd

ID      Requisition Name 0000145721      ☒ Hold From Further Processing

Return: ☐

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen

\*Requisition Date 01/15/2019      [Requester Info](#)

Origin CR      College Requisition

\*Currency Code USD      Dollar

Accounting Date 01/15/2019

[Requisition Defaults](#)      [Add Comments](#)      [Requisition Activities](#)      [Document Status](#)

**Amount Summary** ?

Total Amount 50,000.00 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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.0000	50,000.00	Open

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

Save      Return to Search      Notify      Refresh      Add

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 01/15/2019  
Requisition ID 0000145721      Status Open

☒ Retrieve Active Comments Only      Retrieve

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

**Comments**

[Use Standard Comments](#)

URI Facilities Services  
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-0000145721

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:

Comments

Find | View All | First | 2 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

From -> REQ URIPS-0000145713



OK Cancel Refresh

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

Standard Comments

Comments

\*Action: Copy Comment

Comment Type:  Comment ID: 

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

Description:

Short Desc:

Comments:

OK Cancel Refresh

The Look Up Comment Type box will appear. Choose REQ.

Look Up Comment Type

SetID: URIPS

Standard Comment Type: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results


Standard Comment Type	Description
BID	Bid Language/Bid Types
PO	Purchase Order Language
REQ	Requisition
STD	Standard Instructions

REQ will populate into the Comment Type box. Next, Click on the Comment ID Search icon :

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

The Look Up Comment ID box will appear. Choose "BLKT".

Look Up Comment ID

SetID: URIPS

Standard Comment Type: REQ

Standard Comment ID: begins with

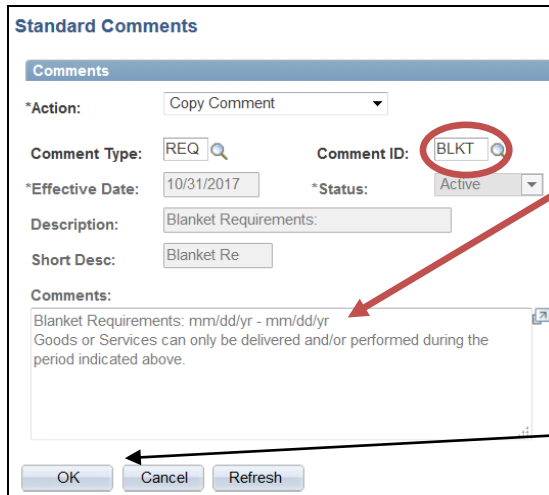
Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

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

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

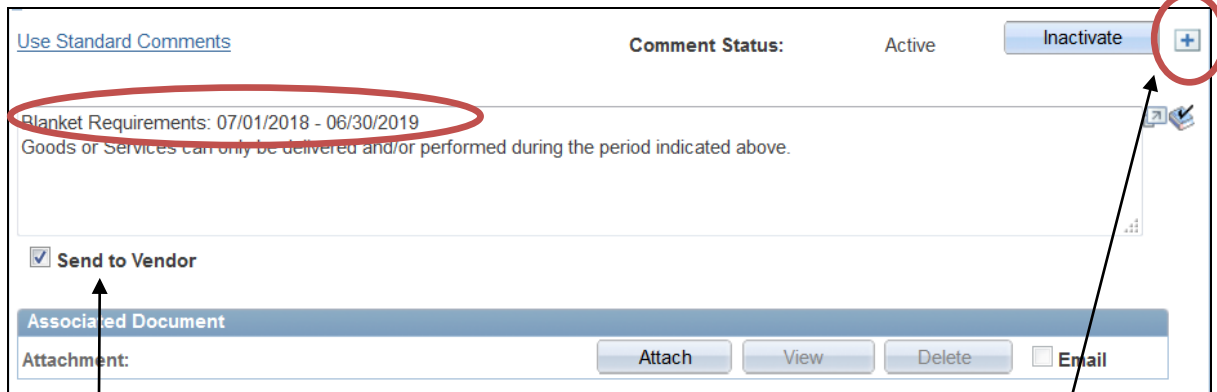


**All Blanket College Requisitions must indicate the Blanket Period - when the comment is brought into the Header Comment, please remember to update the Blanket Requirement dates (i.e.; 07/01/2018 - 06/30/2019).**

Click **OK** to return to the Header Comments.

**Type the Blanket Requirement Dates over the “mm/dd/yr – mm/dd/yr”**

**DO NOT DELETE OR CHANGE ANY of the other wording in this Standard Comment. It is programmed to appear at the top of the Purchase Order.**



Check ☒ **Send to Supplier**.

**To insert another comment, click the .**



All Blanket Purchase Orders must indicate a Description of the goods or services. The Description will print as a Header Comment below the Blanket Requirement Dates and above any Line information.

Again, to add another 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.


Standard Comment Type	Description
BID	Bid Language/Bid Types
PO	Purchase Order Language
REQ	Requisition
STU	Standard Instructions


REQ will populate into the Comment Type box. Next, Click on the Comment ID Search icon  :

**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

**The Look Up Comment ID box will appear. Choose HDR.**

**Look Up Comment ID**

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
<b>HDR</b>	Second Header Description


HDR will populate into the Comment ID box and the entire comment will populate into the Comments box. In this case a tilde (~) appears:

**Standard Comments**

Comments

\*Action: Copy Comment

Comment Type: REQ 

Comment ID: **HDR** 

\*Effective Date: 01/15/2019 \*Status: Active

Description: Second Header Description

Short Desc: Second Hea

Comments: ~

OK Cancel Refresh

**All Blanket College Requisitions must indicate a Description of goods or services - when the comment is brought into the Header Comment, please type this information after the tilde (~) (i.e.; Natural Gas Transportation Services per MPA #233).**

Click **OK** to return to the Header Comments.

Type Header Comment after the tilde (~). **DO NOT DELETE THE TILDE (~)** in this Standard Comment. It is programmed to appear below the Blanket Requirements on the Purchase Order.

[Use Standard Comments](#) Comment Status: Active Inactivate +

~Natural Gas Transportation Services per MPA #233

☒ Send to Vendor

**Associated Document**

Attachment: Attach View Delete Email

**Check** ☒ **Send to Supplier**

## ➤ Adding Attachments

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

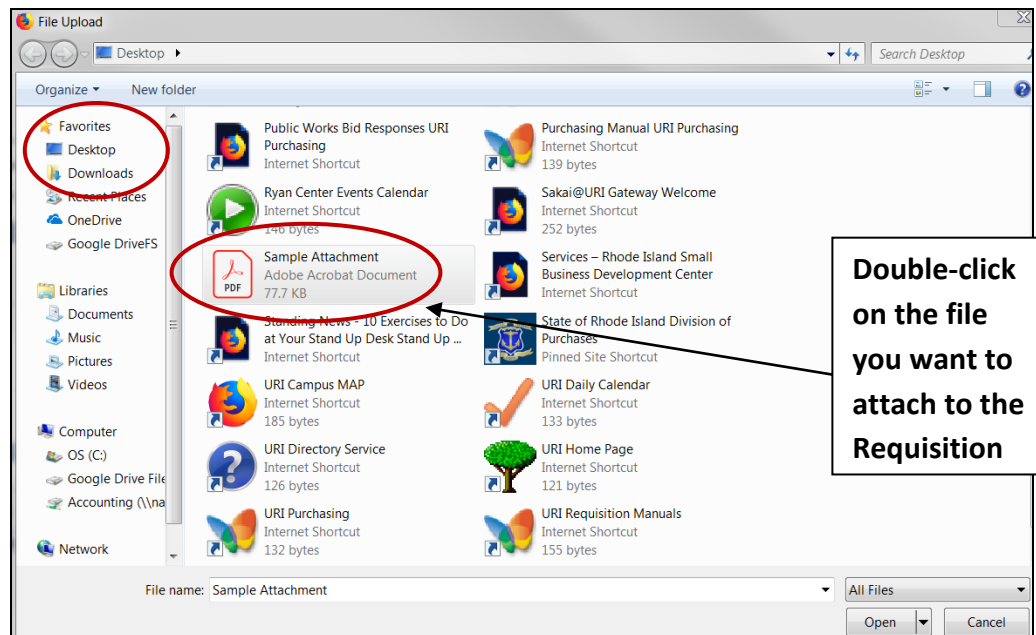
The screenshot shows the 'Header Comments' section of a software interface. At the top, it displays 'Business Unit URIPS', 'Requisition ID 0000145713', 'Requisition Date 12/31/2018', and 'Status Open'. Below this, there are options to 'Retrieve Active Comments Only' and a 'Retrieve' button. A '\*Sort Method' dropdown is set to 'Comment Time Stamp', and a '\*Sort Sequence' dropdown is set to 'Ascending', with a 'Sort' button next to it. The 'Comments' section has a 'Use Standard Comments' link, 'Comment Status Active', and an 'Inactivate' button. There are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Associated Document' section contains a table with one row labeled 'Attachment'. In this row, the 'Attach' button is circled in red. Other buttons in this row include 'View', 'Delete', and 'Email'. At the bottom, there is a 'From -> REQ URIPS-0000145713' field and 'OK', 'Cancel', and 'Refresh' buttons.

This message will appear:

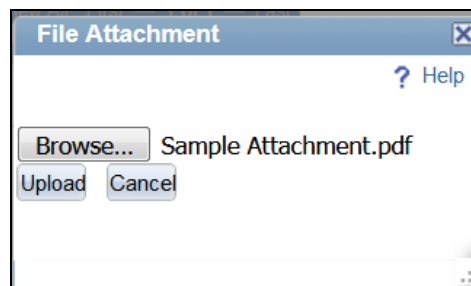
The screenshot shows a 'File Attachment' dialog box. It has a title bar with a close button and a 'Help' link. The main area contains the text 'No file selected.' and a 'Browse...' button. Below this are 'Upload' and 'Cancel' buttons.

Click **Browse...**

**Using the navigation on your computer, find the file that 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.

**Header Comments**

Business Unit URIPS Requisition Date 01/15/2019  
Requisition ID 0000145721 Status Open

☒ Retrieve Active Comments Only Retrieve

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

**Comments** Find | View All First 2 of 4 Last  
Inactivate +

Use Standard Comments Comment Status Active

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-0000145721

OK Cancel Refresh

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

**Comments** Find |  First 2 of 2 Last

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 01/15/2019  
Requisition ID 0000145721      Status Open

☒ Retrieve Active Comments Only      Retrieve

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

**Comments**      Find | View 1      First 1-4 of 4      Last

[Use Standard Comments](#)      Comment Status Active      Inactivate      


URI Facilities Services  
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-0000145721

[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-0000145721

[Use Standard Comments](#)      Comment Status Active      Inactivate      


Blanket Requirements: 07/01/2018 - 06/30/2019  
Goods or Services can only be delivered and/or performed during the period indicated above.

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

**Associated Document**

Attachment      Attach      View      Delete      ☐ Email

From -> REQ URIPS-0000145721

[Use Standard Comments](#)      Comment Status Active      Inactivate      


~Natural Gas Transportation Services per MPA #233

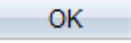
☒ Send to Supplier      ☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**

Attachment      Attach      View      Delete      ☐ Email

From -> REQ URIPS-0000145721

      OK      Cancel      Refresh

Click  when done.



This will bring you back to the main Requisition screen:

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition ID 0000145721      Budget Status Not Chk'd

Requisition Name 0000145721      Return: ☐      ☒ Hold From Further Processing

**Header**

\*Requester kristenbellotti      Bellotti, Kristen  
 \*Requisition Date 01/15/2019      Requester Info  
 Origin CR      College Requisition  
 \*Currency Code USD      Dollar  
 Accounting Date 01/15/2019

[Requisition Defaults](#)      [Add Comments](#)      **Amount Summary**

[Requisition Activities](#)      [Document Status](#)      Total Amount 50,000.00 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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.0000	50,000.00	Open

[View Printable Version](#)      \*Go to ...More...

**Save**      Return to Search      Notify      Refresh      Add

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:

**Requisition**

Business URIPS  
Unit  
Requisition 0000145721  
ID  
Requisition Name 0000145721

Requires State Approval: ☐ [Resubmit](#)

Status Open

Budget Status Not Chk'd

Return: ☐ ☒ Hold From Further Processing

**Header**

\*Requester kristenbellotti Bellotti, Kristen  
\*Requisition Date 01/15/2019 [Requester Info](#)  
Origin CR College Requisition  
\*Currency Code USD Dollar  
Accounting Date 01/15/2019

[Requisition Defaults](#) [Add Comments](#)  
[Requisition Activities](#)  
[Document Status](#)

**Amount Summary**

Total Amount 50,000.00 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 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.0000	50,000.00	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.

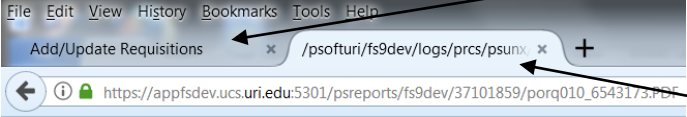
OK

➤ 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](#) again.



**Tab 1 = Add/Update Reqs**

**Tab 2 = Printable Version of Req**

**College Requisition**  
This Form is for Internal Use Only

**Suggested Vendor Name:** Santa Buckley Energy Inc  
**Vendor Address:** 154 Admiral Street  
Bridgeport, CT 06601  
**Vendor#:** 000009277

**Ship To:** URI Central Receiving  
Kingston, RI 02881  
Facilities Services, Business Office  
60 Tootell Rd., Sherman Bldg. 2nd Floor  
**Attention:** Ramsey Lab

<b>Business Unit:</b>	URIPS	OPEN
<b>Date:</b>	01/15/2019	Page 1
<b>Requester:</b>	Bellotti, Kristen	
<b>Requester Dept:</b>	Research Purchasing	
<b>E-mail for Receiving Report:</b>	kristenbellotti@discard.uri.edu	
<b>Phone #:</b>	401/874-2325	<b>Fax #:</b> 401/874-2306

**Attachments:** Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
-----------	-------------	----------	-----	-------	--------------	----------

**Blanket Requirements: 07/01/2018 - 06/30/2019**  
**Goods or Services can only be delivered and/or performed during the period indicated above.**  
Natural Gas Transportation Services per MPA #233

1-1	Fiscal Year 2018/2019	1.0000	TOT	50,000.0000	50,000.00	06/30/2019
-----	-----------------------	--------	-----	-------------	-----------	------------

Type in details about the fuel here.

See attached Single Source Justification Form

URI Facilities Services  
c/o The Ryan Center  
One Lincoln Almond Plaza  
Kingston, RI 02881

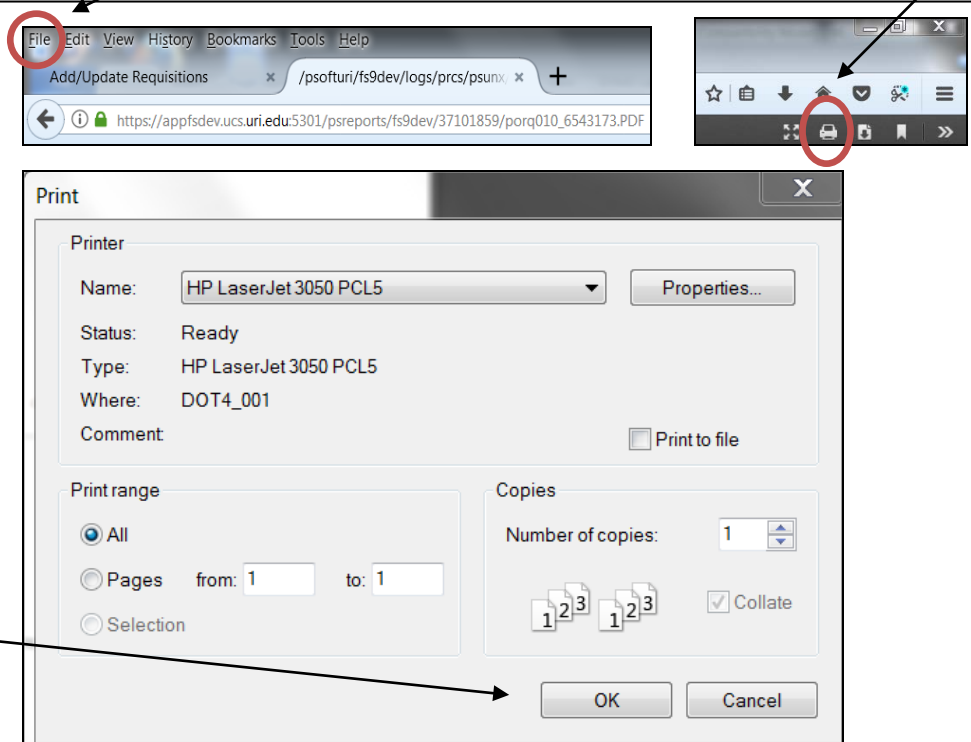
**Total Requisition Amount:** 50,000.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2019	1-1-1	5406-100-4055-0000			25,000.00	
FY2019	1-1-2	5406-110-4061-0000			25,000.00	

For purchasing use only

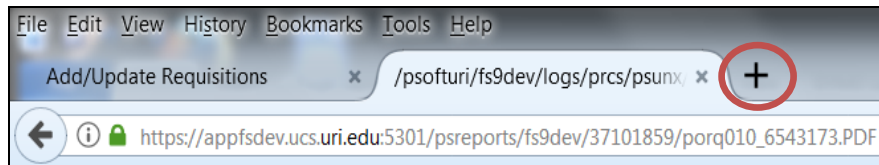
Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date

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


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



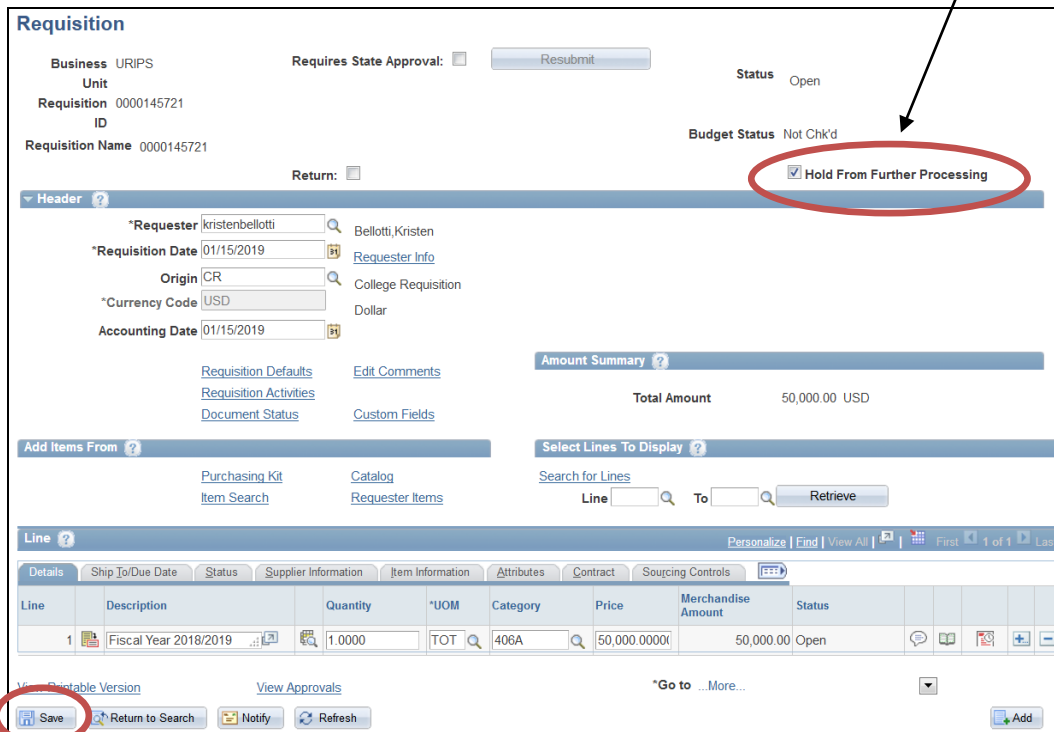
On the following pages, you will find instructions on how to proceed for both:

- [Originator \(page 45\)](#); or
- [Requester \(page 46\)](#)

## ➤ ORIGINATOR Procedures:

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

☐ Hold From Further Processing



**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Budget Status Not Chk'd

Requisition 0000145721      ID      ☒ Hold From Further Processing

Requisition Name 0000145721      Return: ☐

**Header**

\*Requester kristenbellotti      Bellotti,Kristen

\*Requisition Date 01/15/2019      Requisition Info

Origin CR      College Requisition

\*Currency Code USD      Dollar

Accounting Date 01/15/2019

[Requisition Defaults](#)      [Edit Comments](#)      **Amount Summary**

[Requisition Activities](#)      [Custom Fields](#)      Total Amount 50,000.00 USD

[Document Status](#)

**Add Items From**      **Select Lines To Display**

[Purchasing Kit](#)      [Catalog](#)      Search for Lines






[Item Search](#)      [Requester Items](#)      Line To Retrieve

**Line**

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.00000	50,000.00	Open

[View Printable Version](#)      [View Approvals](#)      \*Go to ...More...

 Save       Return to Search       Notify       Refresh       Add

**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:**

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open

Unit      Requisition 0000145721      ID      Budget Status Not Chk'd

Requisition Name 0000145721      Return: ☐      ☒ **Hold From Further Processing**

**Header** ?

\*Requester kristenbellotti      Bellotti, Kristen

\*Requisition Date 01/15/2019      Requisition Info

Origin CR      College Requisition

\*Currency Code USD      Dollar

Accounting Date 01/15/2019

Requisition Defaults      Edit Comments      Amount Summary ?

Requisition Activities      Custom Fields      Total Amount 50,000.00 USD

Document Status      Add Items From ?      Select Lines To Display ?

Purchasing Kit      Catalog      Search for Lines

Item Search      Requisition Items      Line      To      Retrieve

**Line** ?      Personalize | Find | View All | First 1 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Fiscal Year 2018/2019	1.0000	TOT	406A	50,000.0000	50,000.00	Open

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

Save      Return to Search      Notify      Refresh      Add

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

**Requisition**

Business URIPS      Requires State Approval: ☐      Resubmit      Status Open ☒ ☐

Unit      Requisition 0000145721      ID      Budget Status Not Chk'd

Requisition Name 0000145721      Return: ☐      ☐ Hold From Further Processing

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 53.](#)**

- 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):

**Click on the tab**

Find an Existing Value

**Enter the Requisition Number in the Requisition ID field**

**Click** Search

### Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value
Add a New Value

▼ Search Criteria

Business Unit = URIPS 🔍

**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

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 URIPS      Requires State Approval: ☐      Resubmit

Unit      Status: Approved

Requisition 0000145713      Budget Status: **Error**

ID      Budget Status Not Chk'd

Requisition 0000145713

Name      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

Item Search      Requester Items

[Search for Lines](#)

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	3,500.0000	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

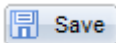
Budget Override	Budget Chartfields	Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1			URIPS	ORF	Exceeds Budget Tolerance	More Detail	<input type="checkbox"/>	Go To ...

[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 .
- 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:**

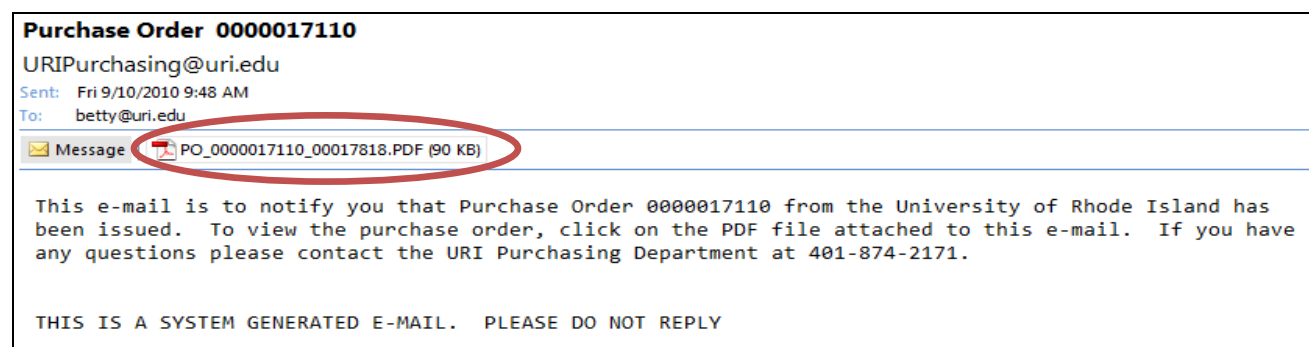
**Budget Date Out of Bounds** - This Budget Exception typically occurs when using a Fund 500. If you receive a budget error of this type you will need to contact the appropriate accountant in the Sponsored & Cost Accounting Office.

**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 Payable 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.

**Purchase Order**

THE UNIVERSITY OF RHODE ISLAND

Page 1 of 1  
P.O.# 0000017110

Date Ordered: 09/10/2010  
Revision: 1  
Buyer: Gil Betty  
Requester: Gil Betty  
Ship Via: UPS  
Due Date: 09/30/2010

Bill To: Accounting  
URI, Carliotti Admin Bldg.  
75 Lower College Rd., Suite 1  
Kingston RI 02881  
(401) 874-2421

Ship To: URI Central Receiving  
Kingston, RI 02881  
Dining Services  
581 Plains Rd., Ste. 2 DSDS  
Attention: Emma Harrold

Vendor: 0000004043  
May Foodservice Equip and Design Corp  
51 Washington Ave  
Cranston RI 02920

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
1-1	Convection Steamer Model CS312	1.00	EA	5,005.00	5,005.00	09/30/2010

Per Bid Specifications #2502

Amount: 5,005.00

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://www.uri.edu/purchasing/>  
Every person or business entity providing goods or services at a cost of \$5000 cumulative 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).

Period	Accounts	INTERNAL USE ONLY	Category	Requisition ID	PO Type
FY2011	654-100-4055-0000	Projects	644A	107	23
FY2011	654-110-4061-0000	Activity	644A	2,502.50	

CERTIFICATE  
I HEREBY CERTIFY THAT THE FORM LISTED ABOVE WERE USED  
IN PURCHASE OF THE GOODS AND SERVICES ORDERED BY ME AND THAT I  
HAVE READ AND UNDERSTAND THE ACCOUNTS LISTED AND HAVE NOT  
BEEN AUTHORIZED TO SIGN THIS CERTIFICATE.

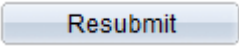
X ☒ URI Authorized Individual Date \_\_\_\_\_ Buyer \_\_\_\_\_

## ➤ 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: 000000405 Has Been Returned By URI Purchasing Department

This e-mail is to notify you that College Requisition: 000000405, 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 . 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 
2. Click 
3. Uncheck ☒ Hold From Further Processing

Status: Open ☒ 

Budget Status: Not Chk'd

☐ Hold From Further Processing

4. Click on ☒ 

5. The Status will change from Open to Pending

6. Click 

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:

**Maintain Requisitions**

**Requisition**

Business Unit: URIPS      Return to Requester: ☐      Requires State Approval: ☐      **Status: Denied** ☒   
 Requisition ID: 0000019881      Budget Status: Not Checked ☒   
 Requisition Name: 0000019881      ☐ Hold From Further Processing

**Header**

\*Requester: bettyg Gil, Betty      [Requisition Defaults](#)   
 Requisition Date: 01/25/2012      [Requester Info](#)      [Edit Comments](#)   
 Origin: CR College Requisition      [Requisition Activities](#)   
 \*Currency Code: USD      Dollar      [Document Status](#)   
 Accounting Date: 01/25/2012

**Amount Summary**

Total Amount: 5,265.00 USD

**Add Items From**

Purchasing Kit      Catalog      **Select Lines To Display**   
 Item Search      Requester Items      Line:  To:  **Retrieve**

**Line**      [Customize](#) | [Find](#) | [View All](#) | |      First 1 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Amount	Status				
1	Convection Steamer	1.0000	EA	654A	5,265.0000	5,265.00	Pending				

[View Printable Version](#)      \*Go to:

Save    Return to Search    Notify    Refresh    Add    Update/Display

### Example of Returned Requisition:

Maintain Requisitions

## Requisition

Business Unit: URIPS  
 Requisition ID: 0000070803  
 Requisition Name: 0000070803

Requires State Approval: ☐ Resubmit Status: Approved  
 Budget Status: Valid

Track Batch: 4

Return: ☒ SeqNum: 10 Please attach detailed specifications. Thank you, Betty

Notify ☐ Hold From Further Processing

**Header**

\*Requester: kgennari Gennari, Kathryn  
 \*Requisition Date: 01/12/2015  
 Origin: CR College Requisition  
 \*Currency Code: USD Dollar  
 Accounting Date: 01/12/2015

[Requisition Defaults](#)  
[Edit Comments](#)  
[Requisition Activities](#)  
[Document Status](#)

**Amount Summary**

Total Amount: 12,000.00 USD  
 Pre-Encumbrance Balance: 12000.00 USD

**Add Items From**

Purchasing Kit Catalog  
 Item Search Requester Items

Select Lines To Display

Line: To: Retrieve

**Line**

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

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:

**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 , 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 01/15/2019  
Requisition ID 0000145721 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 0000009277 Santa Buckley Energy Inc Supplier Location MAIN  
Category 406A [Supplier Lookup](#)

**Schedule**

Ship To 4040\_001\_B Facilities Services \*Distribute By Amount  
Due Date  Ship Via BEST WAY  
Ultimate Use Code  Freight Terms FOB DEST

Original Ship To code

One Time Address

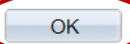
**Distribution**

SpeedChart

**Distributions**

Details Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project
1	<input type="text"/>	URIPS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

 Cancel Refresh

Type in the New Ship To code:

Ship To: 4058\_001\_S Central Receiving

Then Click





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** 12/31/2018

**Requisition ID** 0000145713

**Status** Pending

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

☒ [Mark All](#) ☐ [Unmark All](#)

Retrofit Field Selection				
Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<input type="checkbox"/>		Ship To	4058_001_S	
<input type="checkbox"/>	1	GL Unit	URIPS	<input type="checkbox"/>

OK Cancel Refresh



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

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

**Business Unit** URIPS

**Requisition Date** 12/31/2018

**Requisition ID** 0000145713

**Status** Pending

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

☒ [Mark All](#) ☐ [Unmark All](#)

Retrofit Field Selection				
Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<input checked="" type="checkbox"/>		Ship To	4058_001_S	
<input checked="" type="checkbox"/>	1	GL Unit	URIPS	<input type="checkbox"/>

OK Cancel Refresh

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

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval: ☐ [Resubmit](#)      Status Pending ✗

Unit      Requisition ID 0000145713      Budget Status Not Chk'd

Requisition Name 0000145713      Return: ☐ ☐ Hold From Further Processing

**Header** ?

\*Requester  Bellotti, Kristen

\*Requisition Date  [Requester Info](#)

Origin  College Requisition

\*Currency Code  Dollar

Accounting Date  [Requisition Defaults](#) [Edit Comments](#)

[Requisition Activities](#) [Document Status](#)

**Amount Summary** ?

Total Amount 3,500.00 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 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 	<input type="text" value="1.0000"/>	<input type="text" value="EA"/> 	<input type="text" value="654A"/> 	<input type="text" value="3,500.0000"/>	3,500.00	Approved				

[View Printable Version](#)      \*Go to ...More... 

 Save  Return to Search  Notify  Refresh  Add