

PeopleSoft Purchasing College Requisition (CR)

Standard (one-time delivery/ one-time payment)



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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 suppliers 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*:
 - Pre-Approval - (Requester Role)
 - Level 1 – (Signatory from Signature Authorization)
 - Level 2 – (Final Review from Signature Authorization)
 - 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:
 - CR – College Requisition - Routed to Purchasing for completion.
 - IV – Internal Vendor Requisition - Purchase Order auto generated directly from Req.
 - LV – Limited Value Requisition - Purchase Order auto generated directly from Req.
 - 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

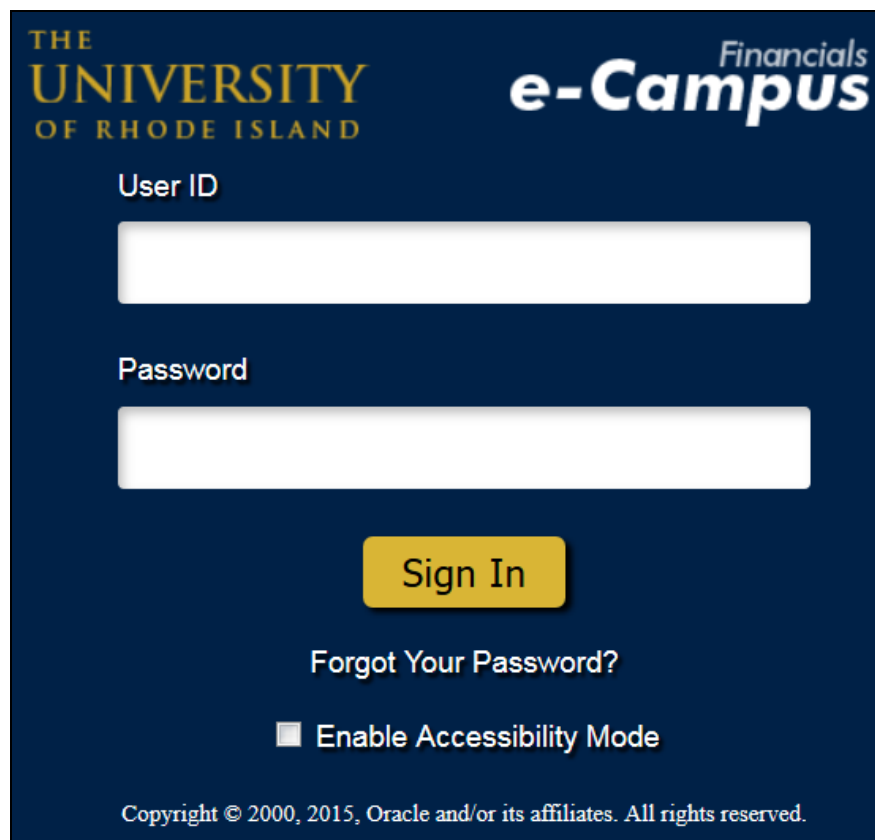
PeopleSoft is to be used in accordance with the URI Access and Compliance Data Confidentiality Statement.

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:

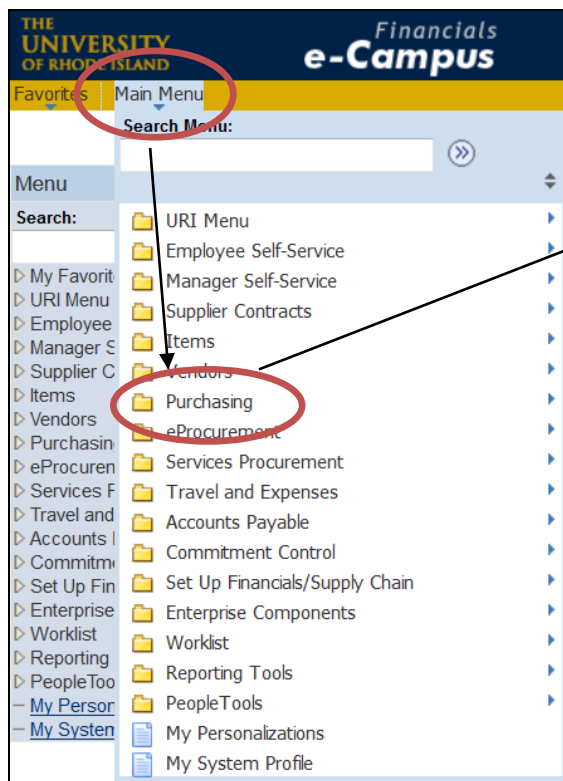
<https://appfsprod.uri.edu:9301/psp/fsprod/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&>



The image shows the login page for The University of Rhode Island's e-Campus Financials. 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 "e-Campus Financials" is displayed in white. Below the university name, there are two input fields: "User ID" and "Password". Below the "Password" field is a yellow "Sign In" button. Below the button are two links: "Forgot Your Password?" and "Enable Accessibility Mode" (which has a small square icon next to it). At the bottom, 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:

Requisitions
Request for Quotes
Purchase Orders
Receipts
Procurement Cards

Then choose Add/Update Requisitions:

Reconcile Requisitions
Review Requisition Information
Reports
Add/Update Requisitions
Requester's Workbench
Approve Amounts

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

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

All text should be entered in upper/lower case.

➤ Requisition Header

Requester - defaults based on your logon;

Requisition Date - defaults to the current date;

Origin defaults to KNG - Change to: CR = College Requisition;

Click the  and Select CR ;

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

Maintain Requisitions

Requisition

Business Unit

URIPS

Requisition ID

NEXT

Requires State Approval:

☐

Resubmit

Status

Open

Budget Status

Not Chk'd

Requisition Name

Copy From

Return:

☐

Hold From Further Processing

☒

Header

*Requester

kristenbellotti

Bellotti Kristen

*Requisition Date

12/31/2018

Requisition Info

Origin

KNG

Kingston

*Currency Code

USD

Dollar

Accounting Date

12/31/2018

Requisition Defaults

Requisition Activities

Add Comments

Amount Summary

Total Amount

0.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Line

Details

Ship To/Due Date

Status

Supplier Information

Item Information

Attributes

Contract

Sourcing Controls

Personalize

Find

View All

First

1 of 1

Last

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 12](#).

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 12/31/2018
 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="button" value="🔍"/>	<input type="text"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>

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

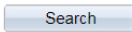
Alternate Supp Name

City State

Country Postal

Class Type




Max Rows



Search Results

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 (v) on the box at the beginning of the line. If there are multiple locations, select the "MAIN" Location.

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

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

Supplier Search

Search Criteria

Name Short Name

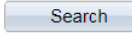
Alternate Supp Name

City State

Country Postal

Class Type

Max Rows






1 to 10 of 19

Search Results


Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withh
<input checked="" type="checkbox"/>	0000004043	MAIN	1	MAYFOODSER-001	May Foodservice Equip and Design Corp	N
<input type="checkbox"/>	0000004048	MAIN	1	MAYFLOWERD-001	Mayflower Distributing Co Inc	N
<input type="checkbox"/>	0000004734	MAIN	2	NORTHEAST-003	Mays Industries	N
<input type="checkbox"/>	0000007862	MAIN	1	MAYNARDB-001	Maynard, Brian K	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 a convection steamer (kitchen equipment) costing \$5,000 or more, the Category is “Equip”. The Category will populate the Account; i.e. Category 654A = Account 9654 . Choose the appropriate Category based on the goods/services you are requisitioning -- Click on the  to choose the correct Category.

Please Note: all CRs utilizing Category Code 669A (Account Code 9669) for Components >\$5K with Fabrication numbers require that a FAB number is entered on the Distribution page. [See page 30 to enter FAB number\(s\).](#)

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 22.](#)

Requisition Defaults

Business Unit URIPS

Requisition Date 12/31/2018

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 0000004043  May Foodservice Equip and Design Corp

Supplier Location MAIN 

Category 

[Supplier Lookup](#)

Schedule

Ship To

*Distribute By Amount 

Due Date

Ultimate Use Code

Ship Via BEST WAY 

Attention To

Freight Terms FOB DEST 

One Time Address


Distribution

SpeedChart

Distributions

Details

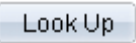
Asset Information

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

Search by either the Category Number (i.e.: 654) or Description (i.e.: Equip) 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:
Category:
Description:

[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

SetID:
Category:
Description:

[Basic Lookup](#)


Search Results

[View 100](#)

SetID	Category	Description	Category Comments
URIPS 429C		Equip: Cafeteria/Kitchen <\$5K	Equipment used for cafet
URIPS 432C		Equip: Dorm/Classrm/Lab <\$5K	Equipment used for educ
URIPS 323C		Equip: Office <\$5K	Equipment used for an of
URIPS 654A		Equip: Office/Lab/Vehicle >\$5K	Equipment >\$5K: office, l

Note:

You can also search Category and Description by using the

 pull down menu. Your choices are:

begins with

contains

=

not =

<

<=

>



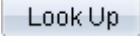
>=

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  and select from the Search Results.

Requisition Defaults

Business Unit URIPS Requisition Date 12/31/2018
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 0000004043 May Foodservice Equip and Supplier Location MAIN
Design Corp
Category 854A 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

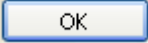
Distributions

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

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 

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 35](#).

➤ Due Date & Distribute By

The requested Due Date for the delivery of goods/services.

DO NOT BACK DATE A DUE DATE - Type in the Due Date in mm/dd/yyyy format or click the  and select the date from the calendar.

Requisition Defaults

Business Unit URIPS Requisition Date 12/31/2018
 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 0000004043 May Foodservice Equip and Supplier Location MAIN
 Design Corp
 Category 854A [Supplier Lookup](#)

Schedule


Ship To 5300 001 Dining Services Warehouse
 Due Date  ***Distribute By** Amount
 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"/>

OK Cancel Refresh

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

➤ Distributions

When requisitioning one or multiple items and charging the same ChartField String or multiple ChartField Strings with the same percent, you may enter that here in the Requisition Defaults Distributions section on this page. **Note:** In Requisition Defaults you can only distribute by percent.

For example:

1. One item being charged to one ChartField String, or
2. Multiple items (i.e.: 1 microscope, 1 lens and 4 sets of slides). Each item is split by the same percent for multiple ChartField Strings; i.e. 3 items each being split by 25%/50%/25%.

If you are Distributing by one of the following, the ChartField String(s) will be entered on the Line on the Requisition main page and [will be discussed on page 18](#).

1. If requisitioning more than one item and each item is being charged to a different ChartField String you will enter the Distribution(s) on each of the Lines; or
2. If the Distribution is based on a dollar amount vs. a percent you will enter the Distributions on the Lines; or
3. If you are processing a Blanket (Single or Multi-year) CR you will enter the ChartField Distributions on the Lines.

Requisition Defaults

Business Unit URIPS Requisition Date 12/31/2018
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 0000004043 May Foodservice Equip and Supplier Location MAIN
Design Corp
Category 654A Supplier Lookup

Schedule

Ship To 5300_001_D Dining Services Warehouse *Distribute By Amount
Due Date 06/30/2019
Ultimate Use Code Ship Via BEST WAY
Attention To Freight Terms FOB DEST

One Time Address

Distribution

SpeedChart

Distributions

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

If you are entering the Distribution on the Line(s) on the Requisition Main Page, click and go to [Line Items on page 18](#).

If you are entering the Distributions here and if there are multiple ChartField Strings, click :

Requisition Defaults

Business Unit: URIPS Requisition ID: NEXT Requisition Date: 12/31/2018 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: 0000004043 May Foodservice Equip and Design Corp Supplier Location: MAIN
 Category: 654A Supplier Lookup

Schedule

Ship To: 5300_001_D Dining Services Warehouse *Distribute By: Amount
 Due Date: 06/30/2019
 Ultimate Use Code: [] Ship Via: BEST WAY
 Attention To: [] Freight Terms: FOB DEST
 One Time Address


Distribution

SpeedChart: []

Distributions

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affil	Budget Date	Location	IN Unit
1		URIPS													12/31/2018	4055_001_S	

OK Cancel Refresh

Enter the number of rows to add. (If you are distributing by 2 ChartField Strings, click  to add 1 row or type in the number of rows you need to add.).



Enter number of rows to add:

1

OK

Cancel

Dist	Percent	GL Unit	Account	Fund	Dept	Program	PC Bus Unit	Project	Activity	Source Type	Category	Bud Ref	Affiliate	Fund Affil	Budget Date	Location
1	25.0000	URIPS													10/20/2017	4055_001_S
2	75.0000	URIPS													10/20/2017	4055_001_S

Enter the Percent for each distribution. Type the Fund, Dept, Program and if the ChartField String contains a Project and Activity, select the PC Bus Unit (URIPS) by clicking . Type the Project and select the Activity by clicking .

NOTE: If the delivery of goods or services is not expected to be within the current Fiscal Year, the Budget Date will need to be changed in order to charge the appropriate Fiscal Year.

Click  when all Distribution lines are done.

You may receive the following message:

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  to continue to the main Requisitions screen.

➤ Line Items

On the main Requisition page:

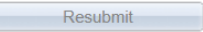
Description – Type the Description of the item being ordered (i.e.: Convection Steamer).

The Description should include any pertinent information such as model number, manufacturer, etc.

Maintain Requisitions

Requisition




Business URIPS
Unit
Requisition ID NEXT
Requisition Name

Requires State Approval: ☐ 

Status Open
Budget Status Not Chk'd
☒ Hold From Further Processing

[Copy From](#) Return: ☐


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](#)
[Requisition Activities](#)


[Add Comments](#)






Amount Summary
Total Amount 0.00 USD

Add Items From 





Purchasing Kit Catalog
Item Search Requester Items

Line

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

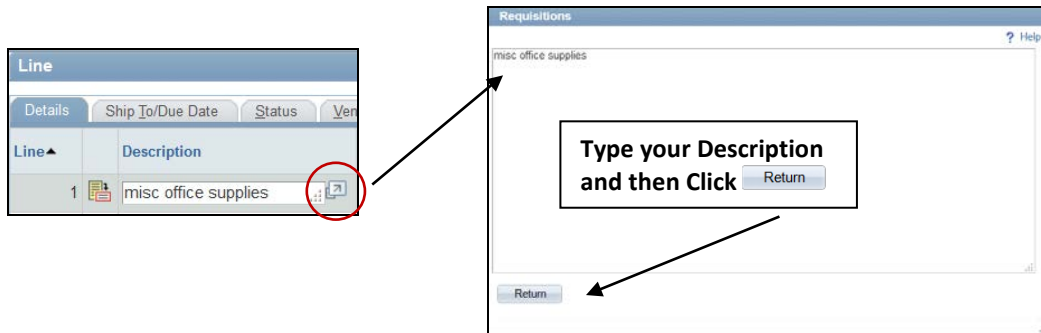
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Convection Steamer	0.0000		654A	0	0.00	Open	    

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

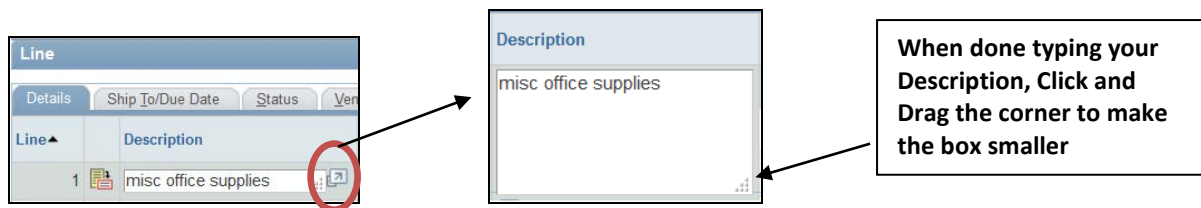
   

There are 4 ways to enter the Line Item Description:

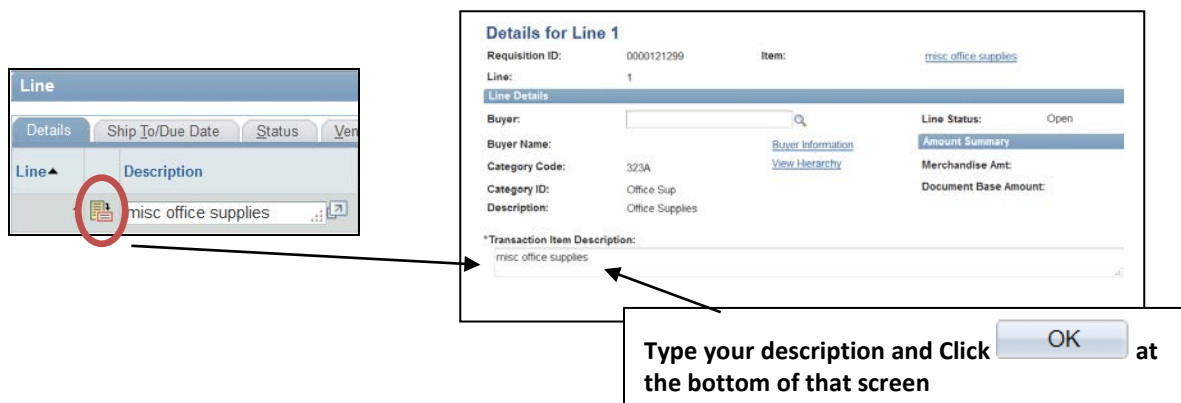
1 – Click on the  at the end of the Description to access the entire Description area:



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 URIPS Requires State Approval: ☐ Resubmit Status Open

Unit Requisition NEXT Budget Status Not Chk'd

ID ☐ Hold From Further Processing

Requisition Name Copy From Return: ☐

*Requester kristenbellotti Bellotti, Kristen

*Requisition Date 12/31/2018 Requisition Info

Origin CR College Requisition

*Currency Code USD Dollar

Accounting Date 12/31/2018

[Requisition Defaults](#) [Add Comments](#)

[Requisition Activities](#)

Amount Summary




Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog

Item Search Requester Items

Line

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Convection Steamer	0.0000		654A	0	0.00	Open	
2		0.0000			0	0.00	Open	
3		0.0000			0	0.00	Open	



DO NOT ATTACH ANY ATTACHMENTS TO A LINE COMMENT.

To add an attachment, follow the instructions on Page 38.

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 12/31/2018

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](#) Comment Status Active Inactivate

[Use Item Specifications](#)

Convection Steamer details/further description about this line only.

☒ 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 continuing 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 NEXT Requisition ID Budget Status Not Chk'd

Requisition Name Return: ☐ ☒ Hold From Further Processing

[Copy From](#) [Add Comments](#) [Amount Summary](#) ?

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

[Requisition Activities](#) Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

Line ?

Personalize | Find | View All | 1-3 of 3 | Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Convection Steamer	0.0000		654A	0	0.00	Open	
2		0.0000			0	0.00	Open	
3		0.0000			0	0.00	Open	

➤ Quantity

Type the Quantity of that item:

Maintain Requisitions

Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit NEXT Requisition ID Budget Status Not Chk'd

Requisition Name Return: ☐ ☒ Hold From Further Processing

[Copy From](#) [Add Comments](#) [Amount Summary](#) ?

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

[Requisition Activities](#) Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

Line ?


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

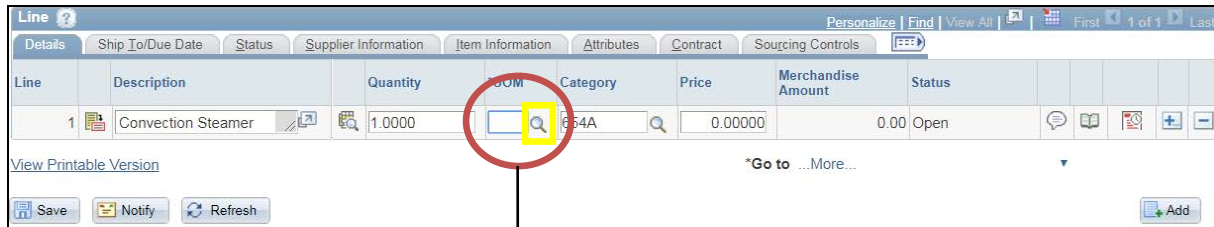
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Convection Steamer	0.0000		654A	0	0.00	Open	

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

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

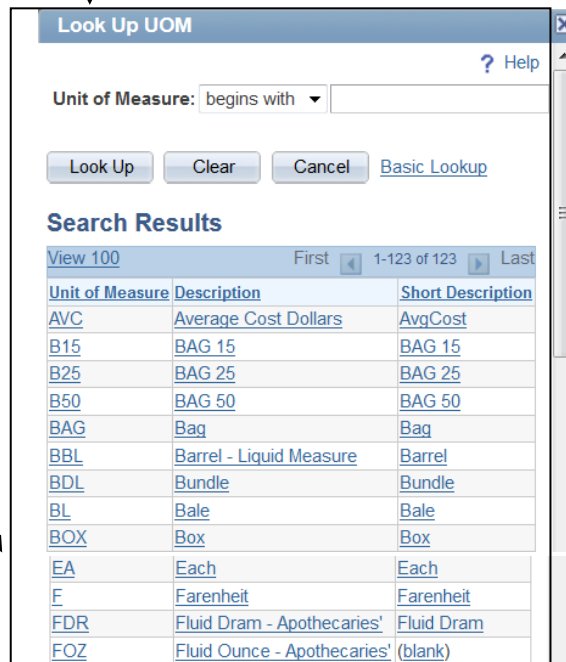
➤ Unit of Measure

Enter the Unit of Measure - UOM (i.e.: EA, TOT, or click  to Search:



The screenshot shows the 'Line' tab of a purchasing system. The 'UOM' field is highlighted with a red circle and a magnifying glass icon, indicating that a search is needed to select a unit of measure.

Select from the Search Results



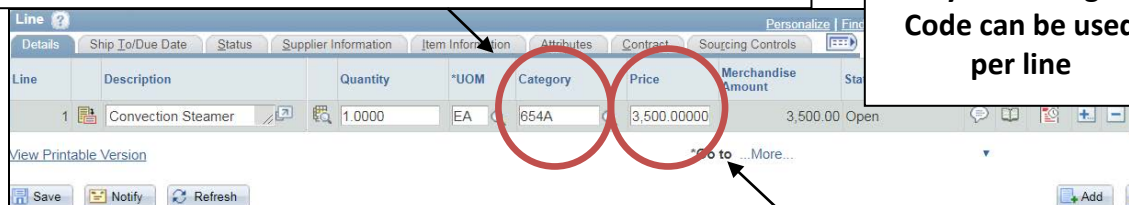
The 'Look Up UOM' dialog box is shown with the 'Unit of Measure' dropdown set to 'begins with'. The 'Search Results' table lists various units of measure:

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)

➤ Category

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

REMINDER:
Only one Category Code can be used per line



The screenshot shows the 'Line' tab with the 'Category' field populated with '654A'. The 'UOM' field is also visible, set to 'EA'.

➤ Price

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



The screenshot shows the 'Line' tab with the 'Price' field populated with '3,500.00000'. The 'UOM' field is set to 'EA' and the 'Category' field is '654A'.

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: 12/31/2018
Requisition ID: NEXT Status: Open

[Return to Main Page](#)

Line	Item	Convection Steamer	Quantity	1.0000	Each	Merchandise Amt	3,500.00	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	5300_0	K	1.0000	3,500.00000	3,500.00	06/30/2019	Bellotti, Kristen	Active


[Add/Edit Comments](#)

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

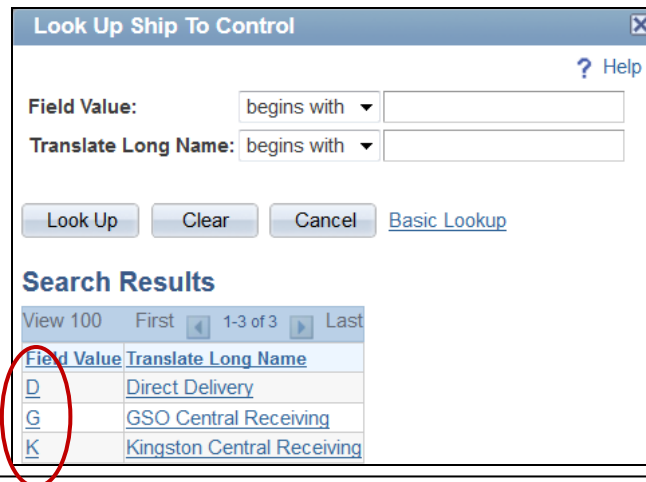
➤ **Ship To Control**

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 12/31/2018
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Convection Steamer	Quantity	1.0000 Each	Merchandise Amt	3,500.00 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	5300_0	K	1.0000	3,500.00000	3,500.00	06/30/2019	Bellotti, Kristen	Active

[Add/Edit 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 [OK](#)

Requisition Ship To Comments

Business Unit URIPS Requisition Date 12/31/2018
 Requisition ID NEXT Status Open

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

Comments Find | View All | First 1 of 1 Last

Use Standard Comments **Ship To 5300_001_C** 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: 12/31/2018
Requisition ID: NEXT Status: Open


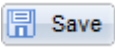
[Return to Main Page](#)

Line	Item	Quantity	Merchandise Amt
1	Convection Steamer	1.0000 Each	3,500.00 USD

Schedule

Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	5300_0	K	1.0000	3,500.00000	3,500.00	06/30/2019	Bellotti, Kristen	Active

[Add/Edit Comments](#)

- If the ChartField String Distribution(s) was not entered on the Requisition Defaults the Requisition cannot be saved - skip this page and go to [Entering Distribution\(s\) on the Line on page 28.](#)
- If you are using Category Code 669A (Components >\$5K), you must enter the Fabrication [\(FAB\) number\(s\) to the line\(s\) - go to page 30.](#)
- If the Chartfield String Distribution(s) was/were entered on the Requisition Defaults page,  and  the Requisition:

You will receive this message:

Click

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.

➤ Requisition ID

A Requisition ID has been assigned. The Requisition ID is for internal use only. (This is not the Purchase Order Number)

[Go to page 33 to add additional Line Items](#) or if there are no more items [go to page 35 to add Comments](#) and [go to page 38 to add Attachments](#).



Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit
Requisition ID 0000145710
 Requisition Name 0000145710 Budget Status Not Chk'd

Return: ☐ ☒ Hold From Further Processing

Header ?

*Requester kristenbellotti Bellotti, Kristen
 *Requisition Date 12/31/2018 [Requester Info](#)
 Origin CR College Requisition
 *Currency Code USD Dollar
 Accounting Date 12/31/2018 [Requisition Defaults](#) [Add 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

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

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

Save Return to Search Notify Refresh Add

➤ Entering Distributions on the Line

If the Distributions were not entered on the Requisition Defaults page, you will need to enter them here.

Click on the  Distribution tab on the Schedule page:

Maintain Requisitions

Schedule

Business Unit: URIPS Requisition Date: 12/31/2018
 Requisition ID: NEXT Status: Open

[Return to Main Page](#)

Line	Item	Quantity	Merchandise Amt
1	Convection Steamer	1.0000 Each	3,500.00 USD

Schedule Details

Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	5300_00	K	1.0000	3,500.00000	3,500.00	06/30/2019	Bellotti, Krister	Active

[Add Ship To Comments](#)

Save Notify Refresh Add Update/Display

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

Maintain Requisitions

Distribution

Requisition ID: NEXT Item: Convection Steamer
 Line: 1 Status: Active
 Schedule: 1

Ship To: 5300_001_D Dining Ser

*Distribute By: Amount

SpeedChart: Multi-SpeedCharts

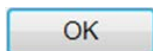
Quantity: 1.0000 EA
 Open Amount: 3,500.000
 Merchandise Amt: 3,500.00 USD

Distributions

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	3,500.00	URIPS	12/31/2018	9654											

OK Cancel Refresh

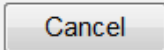
Enter the desired number of rows. For example, if the purchase is being charged to 2 ChartField Strings, click



to add 1 row.

Enter number of rows to add:





Initially, the Category Code that was chosen on the Requisition Defaults page will populate the Account Code to the first Distribution line. When more lines are added, the same Category Code will populate in the Account field. **DO NOT CHANGE THE ACCOUNT #**

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	3,500.00	URIPS	12/31/2018	9854											
2	Open	0.00	0.00	URIPS	12/31/2018	9854											

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 .

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	Open	50.0000	1,750.00	URIPS	12/31/2018	9854	100	4055	0000				
2	Open	50.0000	1,750.00	URIPS	12/31/2018	9854	110	4061	0000				

Note: The Budget Date defaults to the current date. Therefore, if you are processing a College Requisition and the delivery will not be made until the next Fiscal Year, the Budget Date will need to be changed in order to pre-encumber the funds in the appropriate Fiscal Year. For example, if you are processing a College Requisition in June for delivery after June 30th, change the Budget Date to a date in the new Fiscal Year.



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 33.](#)
DO NOT ENTER *any* Category Codes in Defaults if there is more than one on the Requisition.

If you are done entering all of the ChartField Strings and Lines in Distributions and DO NOT need to enter a Fabrication number (FAB number – using Category Code 669A for Components >\$5K),

Click  to [return to the Schedule page and continue on page 32.](#)


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

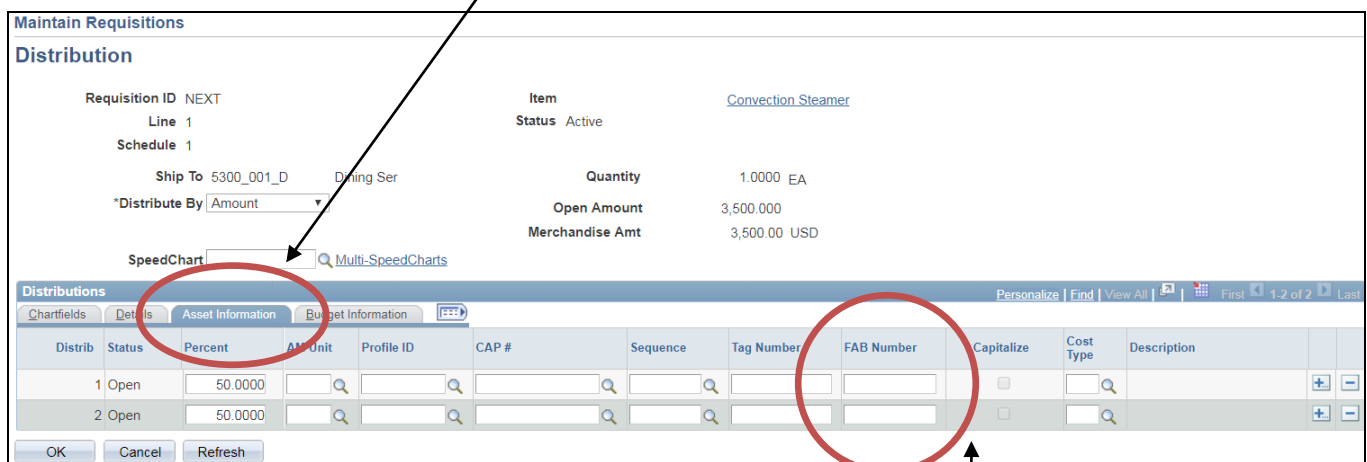
➤ Entering Fabrication Numbers for Research Projects

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

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

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

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



The screenshot shows the 'Maintain Requisitions' page with the 'Distribution' tab selected. The 'Asset Information' sub-tab is active. A red circle highlights the 'Asset Information' sub-tab, and an arrow points to it from the text above. Another red circle highlights the 'FAB Number' field in the table below, with an arrow pointing to it from the text below. The table has columns: Distrib, Status, Percent, AMT, Unit, Profile ID, CAP #, Sequence, Tag Number, FAB Number, Capitalize, Cost Type, and Description. The first two rows are highlighted in grey.

Distrib	Status	Percent	AMT	Unit	Profile ID	CAP #	Sequence	Tag Number	FAB Number	Capitalize	Cost Type	Description
1	Open	50.0000										
2	Open	50.0000										

Enter the FAB Number in the appropriate field.

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

Message

FAB Number Required on Line 1 Distribution 1

Requisition distributions using account 9669 require an FAB Number.

OK

Go back and enter the FAB number(s).

Once the Requisition is saved, the FAB Number will print on the Requisition in the Distribution section of the CR

College Requisition
This Form is for Internal Use Only

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

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

Business Unit:	URIPS	OPEN
Date:	02/13/2018	Page
Requester:	Angell, Tracey	Req ID:
Requester Dept:	Purchasing	E-mail for Receiving Report:
		tracey@discard.uri.edu
		Phone #
		Fax #
		401/874-2326 401/874-2366

Attachments: N

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

Total Requisition Amount: 5,000.00

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

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

Purchase Order

THE UNIVERSITY OF RHODE ISLAND

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

Date Ordered: 02/13/2018
Revision: 1
P.O.#: 0000101170

Payment Terms: Net 30
Freight Terms: FOB DESTINATION
Ship Via: BRST WAY

Buyer: Angell, Tracey
Phone: 401/874-2326
Requester: Angell, Tracey
Requester Email: tracey@discard.uri.edu

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

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

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

Amount: 5,000.00

NOTES TO VENDOR:
THE ABOVE PO# MUST APPEAR ON ALL INVOICES

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

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

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

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

➤ Return to Schedule Page

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

Maintain Requisitions

Schedule

Business Unit: URIPS Requisition Date: 12/31/2018
 Requisition ID: NEXT Status: Open

[Return to Main Page](#)

Line	Item	Convection Steamer	Quantity	1.0000	Each	Merchandise Amt	3,500.00	USD																		
<p>Schedule</p> <p>Personalize Find View All First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Ship To</th> <th>Ship To Control</th> <th>Quantity</th> <th>Price</th> <th>Merchandise Amount</th> <th>Due Date</th> <th>Attention To</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>5300_0</td> <td>K</td> <td>1.0000</td> <td>3,500.00000</td> <td>3,500.00</td> <td>06/30/2019</td> <td>Bellotti, Kristen</td> <td>Active</td> </tr> </tbody> </table> <p>Add Ship To Comments</p> <p>Save Notify Refresh Add Update/Display</p>									Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status	1	5300_0	K	1.0000	3,500.00000	3,500.00	06/30/2019	Bellotti, Kristen	Active
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status																		
1	5300_0	K	1.0000	3,500.00000	3,500.00	06/30/2019	Bellotti, Kristen	Active																		

This will return you to the Maintain Requisitions page:

Maintain Requisitions

Requisition

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

[Copy From](#)

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

Total Amount: 3,500.00 USD

Add Items From ?

Purchasing Kit Catalog
 Item Search Requester Items

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

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

Save Notify Refresh Add

When all lines are complete, Click  Save .

[To add additional Line Items, see page 33.](#) Click  Save when done.

This message will appear:

Message

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

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

OK

Click

OK

A Requisition ID has been assigned. The Requisition ID is for internal use only and is located in the upper left-hand of the screen. (This is not the Purchase Order Number)

➤ To Add Additional Line Items

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

Requisition

Business Unit: URIPS
Requisition ID: 0000145713
Requisition Name: 0000145713

Requires State Approval: ☐ Resubmit
Status: Open
Budget Status: Not Chkd
Hold From Further Processing: ☒

Return: ☐

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
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

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

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

Save Return to Search Notify Refresh Add

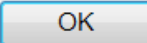
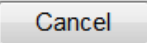
Enter the desired number of rows (lines) to add.

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:

Requisition



Business Unit: URIPS
 Requisition ID: 0000145713
 Requisition Name: 0000145713

Requires State Approval: ☐ 

Status: Open
 Budget Status: Not Chk'd

Return: ☐ ☒ Hold From Further Processing



Header

*Requester: kristenbellotti Bellotti, Kristen
 *Requisition Date: 12/31/2018  [Requester Info](#)
 Origin: CR College Requisition
 *Currency Code: USD Dollar
 Accounting Date: 12/31/2018 

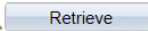
[Requisition Defaults](#) [Add Comments](#)
[Requisition Activities](#)
[Document Status](#)

Amount Summary

Total Amount: 3,500.00 USD

Add Items From  **Select Lines To Display** 

Purchasing Kit Catalog [Search for Lines](#)



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

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

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

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

You will receive the following message:

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

➤ Adding Header Comments

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

Requisition

Business Unit: URIPS
Requisition ID: 0000145713
Requisition Name: 0000145713

Requires State Approval: ☐ Resubmit

Status: Open
Budget Status: Not Chk'd
Return: ☐ ☒ Hold From Further Processing

Header

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

[Requisition Defaults](#) [Add 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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Convection Steamer	1.0000	EA	654A	3,500.00000	3,500.00	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 12/31/2018
Requisition ID 0000145713 Status Open

☒ Retrieve Active Comments Only [Retrieve](#)

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

Comments [View All](#) [First](#) 1 of 1 [Last](#)

[Use Standard Comments](#) [Inactivate](#) [+](#)

URI Dining 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-0000145713				

[OK](#) [Cancel](#) [Refresh](#)

Check the ☒ **Send to Supplier** box

To View All
Comments, Click
[View All](#)

To add additional
Header Comments,
Click [+](#)

To add Standard Comments, click on the [Use Standard Comments](#) hyperlink:

The screenshot shows the 'Comments' window. At the top left, the 'Use Standard Comments' hyperlink is circled in red. The window includes a 'Comment Status' section with 'Active' and 'Inactivate' buttons. Below this are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Associated Document' section contains an 'Attachment' field and buttons for 'Attach', 'View', 'Delete', and 'Email'. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons. The text 'From -> REQ URIPS-0000145713' is visible at the bottom left.

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

The first screenshot shows the 'Standard Comments' window. The 'Comment Type' field is empty and circled in red, with a search icon to its right. The 'Comment ID' field also has a search icon. The second screenshot shows the 'Look Up Comment Type' window. The 'SetID' is 'URIPS'. The 'Standard Comment Type' dropdown is set to 'begins with'. The 'Description' dropdown is also set to 'begins with'. The 'Look Up' button is highlighted. Below the search results, the 'REQ' option is circled in red.

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

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

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

The first screenshot shows the 'Standard Comments' window. The 'Comment Type' field now contains 'REQ' and is circled in red. The 'Comment ID' field is empty and circled in red, with a search icon to its right. The second screenshot shows the 'Look Up Comment ID' window. The 'SetID' is 'URIPS'. The 'Standard Comment Type' dropdown is set to 'REQ'. The 'Standard Comment ID' dropdown is set to 'begins with'. The 'Description' dropdown is also set to 'begins with'. The 'Look Up' button is highlighted. Below the search results, the 'BLKT' option is circled in red.

The Look Up Comment ID box will appear. Choose the appropriate Comment ID – ie: BLKT

Standard Comment ID	Description
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:

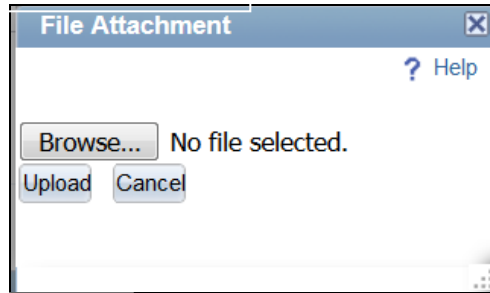
In this example, when the Comment is brought into the Header Comment, please remember to update the Blanket Requirement dates.

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

➤ Adding Attachments

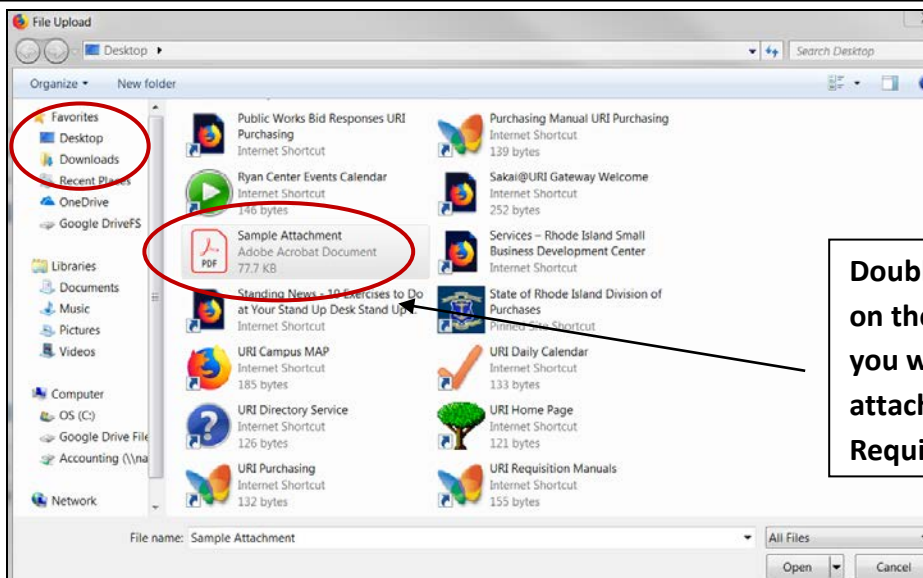
To add an Attachment(s), Click **Attach** in the Header Comments box:

This message will appear:

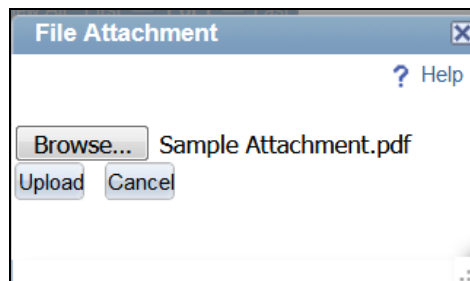


Click **Browse...**

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



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 12/31/2018
Requisition ID 0000145713 Status Open

☒ Retrieve Active Comments Only

*Sort Method Comment Time Stamp *Sort Sequence Ascending

Comments Find | View All First 1 of 1 Last
[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 ☐ Email

From -> REQ URIPS-0000145713

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 12/31/2018
Requisition ID 0000145713 Status Open

☒ Retrieve Active Comments Only
*Sort Method Comment Time Stamp *Sort Sequence Ascending

Comments Find | View 1 First 1-2 of 2 Last


[Use Standard Comments](#) Comment Status Active 

URI Dining 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-0000145713				

[Use Standard Comments](#) Comment Status Active 

See attached Single Source Justification Form

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

Associated Document

Attachment	Attach	View	Delete	Email
Sample_Attachment.pdf				
From -> REQ URIPS-0000145713				

Click  when done.

This will bring you back to the main Requisition screen:

Maintain Requisitions

Requisition

Business URIPS
Unit
Requisition 0000145713
ID
Requisition 0000145713
Name

Requires State Approval: ☐ Resubmit

Status Open

Budget Status Not Chk'd

Return: ☐ ☒ Hold From Further Processing

Header

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

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

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

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

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

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

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.

Click

➤ You are now ready to Print your Requisition.

➤ Print the Requisition

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

Maintain Requisitions

Requisition

Business URIPS
Unit
Requisition 0000145713
ID
Requisition 0000145713
Name

Requires State Approval: ☐ Resubmit

Status Open

Budget Status Not Chk'd

Return: ☐ ☒ Hold From Further Processing

Header

*Requester kristenbellotti Bellotti, Kristen
*Requisition Date 12/31/2018 Requisition 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

Purchasing Kit Catalog
Item Search Requisition 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	Convection Steamer	1.0000	EA	654A	3,500.00000	3,500.00	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.

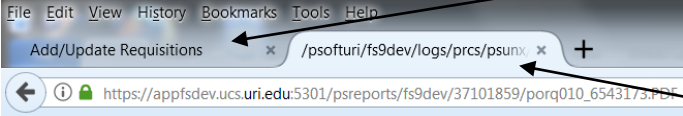
OK

➤ 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: May Foodservice Equip and Design Corp
 Vendor Address: 51 Washington Ave
 Cranston, RI 02920
 Vendor#: 0000004043

Ship To: URI Central Receiving
 Kingston, RI 02881
 Dining Services Warehouse
 FDC, 10 Tootell Rd

Business Unit		URIPS	OPEN
Date	Page		Req ID
12/31/2018	1		0000145719
Requester		E-mail for Receiving Report	
Bellotti, Kristen		kristenbellotti@uri.edu	
Requester Dept.		Phone #	Fax #
Research, Purchasing		401/874-2325	401/874-2306

Attachments: Y

Line	Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
1-1		Convection Steamer	1.0000	EA	3,500.0000	3,500.00	06/30/2019

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

See attached Single Source Justification Form

dkthlaigwnokgjl

Total Requisition Amount: 3,500.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2019	1-1-1	9654-100-4055-0000			1,750.00	
FY2019	1-1-2	9654-110-4061-0000			1,750.00	

For purchasing use only

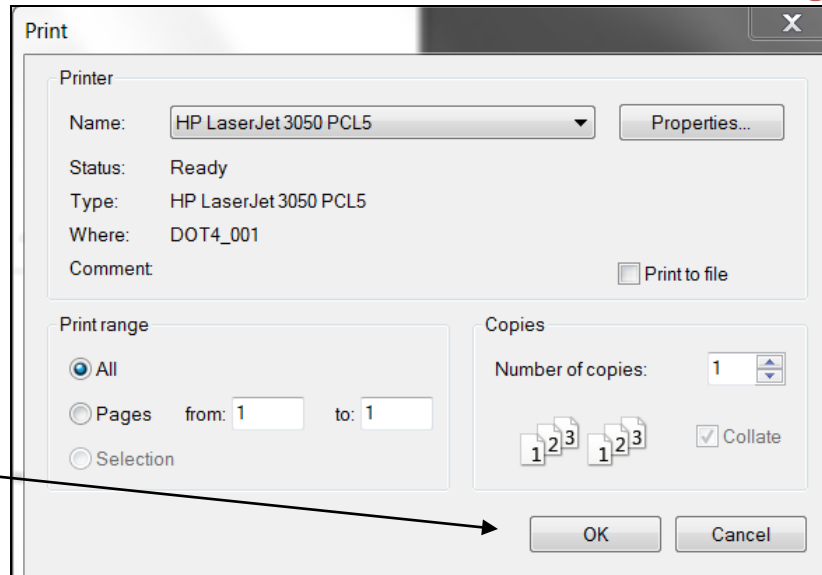
Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk
					Date

To print the Requisition, choose either **File** in the upper left of the screen or the printer icon in the upper right of the screen.

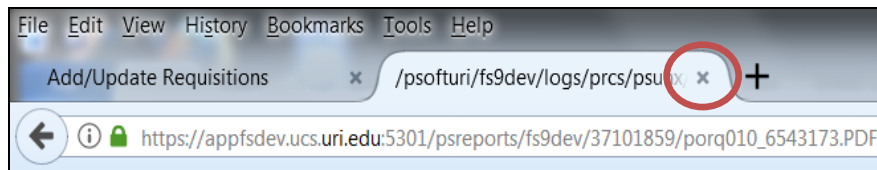


The Print box window comes up; choose where to Print your Requisition and Click

OK




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



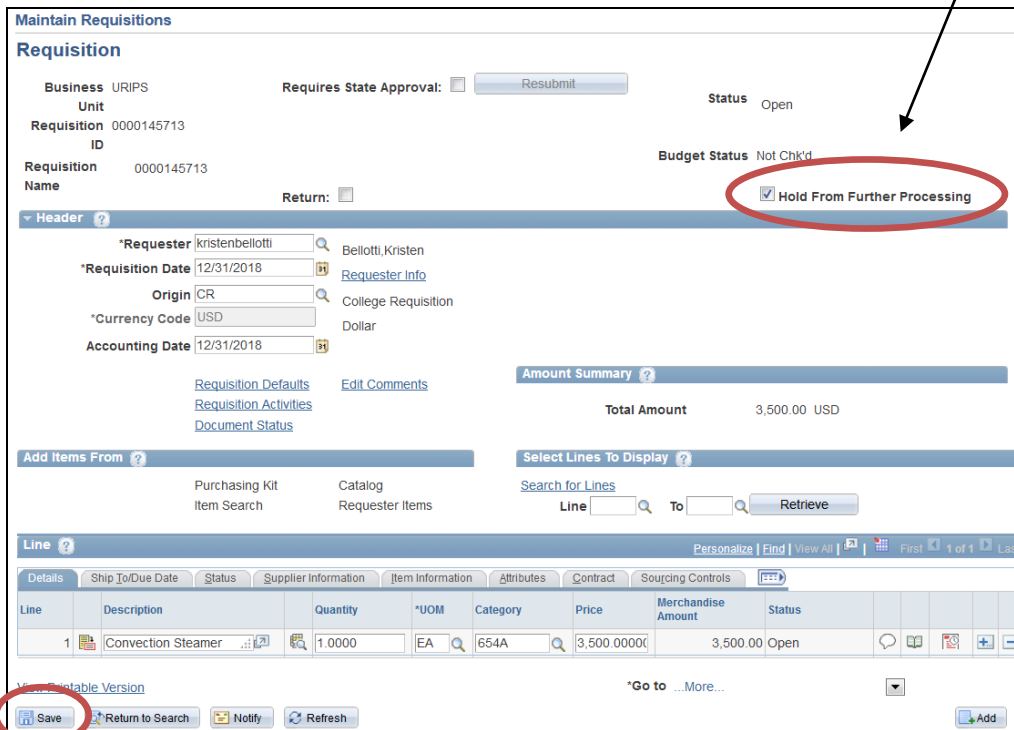
On the following pages, you will find instructions on how to proceed for both:

- [Originator \(page 46\)](#); or
- [Requester \(page 47\)](#)

➤ ORIGINATOR Procedures:

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

☐ Hold From Further Processing



Maintain Requisitions
Requisition

Business Unit: URIPS
Requisition ID: 0000145713
Status: Open
Budget Status: Not Chk'd
☒ Hold From Further Processing

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

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	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Convection Steamer	1.0000	EA	654A	3,500.0000	3,500.00	Open

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:

Maintain Requisitions
Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open
Unit Requisition 0000145713 ID Budget Status Not Chk'd
Requisition Name 0000145713 Return: ☐ ☒ Hold From Further Processing

Header ?

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

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

Total Amount 3,500.00 USD

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

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

Line ? Personalize Find View All First 1 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Convection Steamer	1.0000	EA	654A	3,500.0000	3,500.00	Open

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

Save Return to Search Notify Refresh

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

Maintain Requisitions
Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit Requisition 0000145713 ID Budget Status Not Chk'd
Requisition Name 0000145713 Return: ☐ ☐ Hold From Further Processing

Then Click Save at the bottom of the screen.

The Requisition has now entered the Workflow Approval Process.

Once this happens the Requisition cannot be retrieved.

➤ Workflow Approval Process

Level 1 - Signatory for Signature Authorization

Level 2 - Final Review from Signature Authorization

Level 3 - Administrative Approvals; i.e.:

- Foundation Office when using Foundation Funds
- Sponsored and Cost Accounting when using Research Funds
- Business Services when using Bond Funds

Level 4 - Administrative Approvals which are based on the Category/Account Code

- Controller's Office for Prepaid Costs, Revolving Loan Costs and Service Charges
- Capital Projects for Construction-related expenses
- Public Safety for Radioactive Materials and Safety Supplies
- Property Department for Capital Equipment on fund 500

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

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

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

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

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

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

Comments: Use fund 110

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

Enter the Requisition ID and click Search.

Make necessary changes, pre-Approve and Click  Save .

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

If a Requisition needs to be Canceled please see [“Canceling a Requisition” on page 54.](#)

- 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 Unit: URIPS
 Requisition ID: 0000145713
 Requisition Name: 0000145713

Requires State Approval: ☐ Resubmit

Status: **Approved**
 Budget Status: **Error**

Budget Status: Not Chk'd

Return: ☐ Hold From Further Processing

Header

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

Requestion Defaults Edit Comments
 Requestion 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

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
 Maximum Rows: 100
 Search

Override Transaction
 More Budgets Exist

Advanced Budget Criteria

Budgets with Exceptions

Customize Find View All First 1 of 1 Last

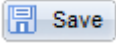
Budget Override	Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1		URIPS	ORG	Exceeds Budget Tolerance	More Detail	<input type="checkbox"/>	Go To ...

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:

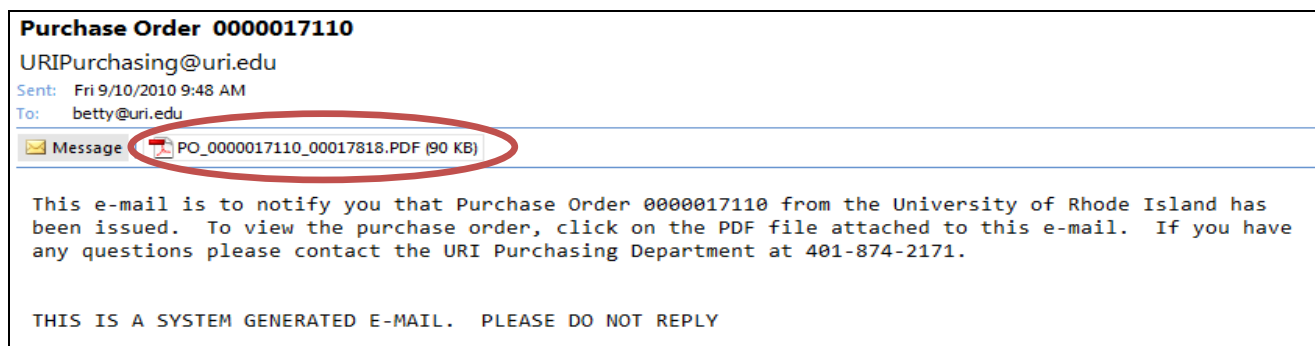
Budget Date Out of Bounds - This Budget Exception typically occurs when using a Fund 500. If you receive a budget error of this type you will need to contact the appropriate accountant in the Sponsored & Cost Accounting Office.

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

Date Ordered: 09/10/2010 Revision: 0000017110 P.O.# 0000017110

Payment Terms: Net 30 Freight To: FOB DESTINATION Ship Via: AIR

Buyer: Gil Betty Phone: 401/874-2310 Due Date: 09/30/2010

Requester: Gil Betty Phone: 401/874-2310 Requester Email: betty@uri.edu

Bill To: Accounting
URI, Carotti 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 Harold

Vendor: 000004043
May Foodservice Equip and Design Corp
51 Washington Ave
Cransford RI 02820

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

Period	Accounts	INTERNAL USE ONLY	Projects	Activity	Category	Requisition ID	PO Type
PT2011 9654-100-4055-0000					654A	107	63
PT2011 9654-110-4061-0000					654A	2,502.50	

JUST RECEIVED CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT BEEN PAID BEFORE. I AM ONLY AUTHORIZED TO SIGN THIS CERTIFICATE.

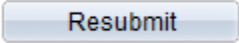
☒ URI Authorized Individual Date: Buyer: *Betty*

➤ Returned Requisition

A College Requisition submitted to Purchasing requiring additional information, specifications, documentation, etc., may be returned. When a Requisition is returned from Purchasing, the requester will receive an e-mail stating the reason for return.

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

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

Returned Requisitions will not require Re-Approval through the Workflow Approval Process unless there is a change to the ChartField String or Price. For example, if a Requisition is returned for detailed specifications, the Requester will retrieve the Requisition (see instructions above to retrieve the Requisition), attach the specifications, and click . 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





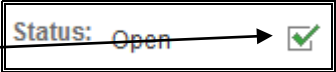
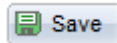
Status: Open

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

Amount Summary

Total Amount: 5,265.00 USD

Select Lines To Display

Line: To:

Line

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

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

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

Amount Summary

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

Add Items From

Purchasing Kit
 Item Search Catalog
 Requester Items

Select Lines To Display

Line: To: Retrieve

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

View Printable Version

*Go to: ...More...

Save Return to Search Notify Refresh Add

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 12/31/2018
Requisition ID 0000145713 Status Pending

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 0000004043 May Foodservice Equip and Supplier Location MAIN
Design Corp
Category 654A Supplier Lookup

Schedule

Ship To 5300_001_D Dining Services Warehouse *Distribute By Amount
Due Date 06/30/2019
Ultimate Use Code Ship Via BEST WAY
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	A
1		URIPS								

OK Cancel Refresh

Type in the New Ship To code:

Ship To: 4058_001_S Central Receiving

Then Click

OK

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

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

Business Unit URIPS

Requisition Date 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 Unit: URIPS
 Requisition ID: 0000145713
 Requisition Name: 0000145713

Requires State Approval: ☐ Resubmit

Status: Pending ✖

Budget Status: Not Chk'd

Return: ☐ Hold From Further Processing

Header

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

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

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

Amount Summary

Total Amount: 3,500.00 USD

Add Items From

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	Convection Steamer	1.0000	EA	654A	3,500.0000	3,500.00	Approved

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

 Save  Return to Search  Notify  Refresh  Add