

FOR USE BY THE OFFICE CAPITAL PROJECTS ONLY

PeopleSoft Purchasing College Requisition (CR)

CAPITAL PROJECTS (NON OCP FUNDS)



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➤ 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.

The Office of Capital Projects will send either of the following to Purchasing via Interoffice Mail with either a copy of the College Requisition or a Transmittal Form which references the PeopleSoft College Requisition. **In either case the College Requisition MUST be referenced when submitting the CDs.**

- If it is to be bid by the State Division of Purchases, include 2 CDs containing the Plans and Specifications and the Invitation to Bid in a Word Document.
Note: The Specification Package and Drawings should be separate files.
- If it is to be bid by URI, include 2 CDs containing the Plans and Specifications. There may also be one separate CD for URI Purchasing only, which contains the Plans and Specifications and the Invitation to Bid in a Word Document; or the Invitation to Bid can be attached to the electronic Requisition.
Note: The Specification Package and Drawings should be separate files.

➤ Logging Into Peoplesoft

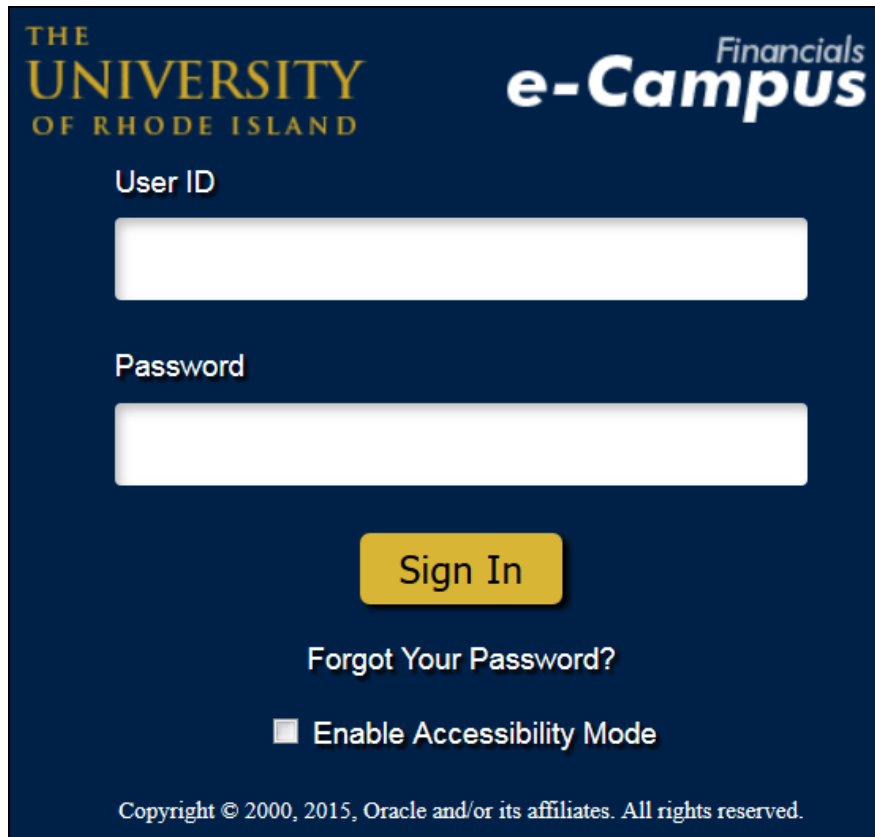
PeopleSoft is to be used in accordance with the URI Access and Compliance Data Confidentiality Statement.

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:

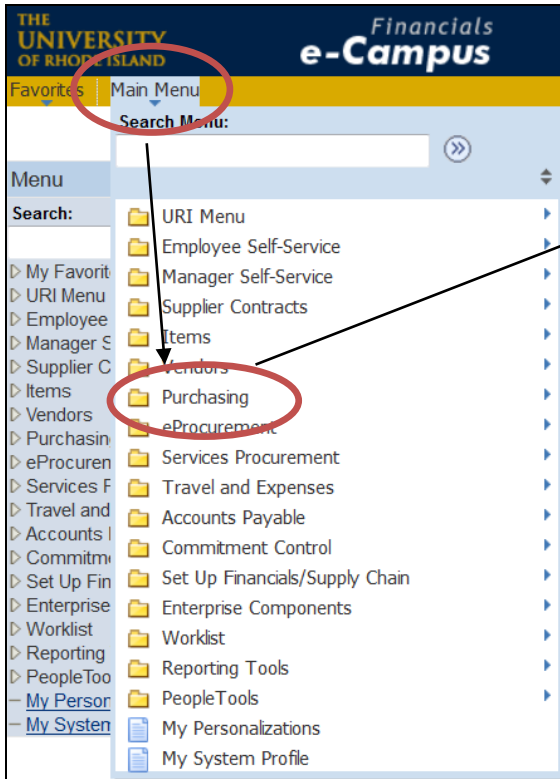
<https://appfsprod.uri.edu:9301/psp/fsprod/EMPLOYEE/ERP/?cmd=login&languageCd=ENG&>



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, "Financials" is in a small white font, and "e-Campus" is in a large, bold, white font. Below the university name, the label "User ID" is in white, followed by a white rectangular input field. Below that, the label "Password" is in white, followed by another white rectangular input field. A yellow "Sign In" button is centered below the password field. Under the button, the text "Forgot Your Password?" is in white. Below that is a checkbox with the label "Enable Accessibility Mode" in white. At the very bottom, a small white copyright notice reads: "Copyright © 2000, 2015, Oracle and/or its affiliates. All rights reserved."

➤ To Add a New Requisition

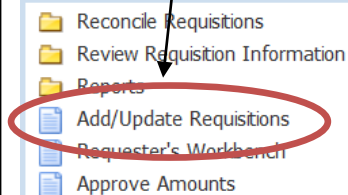
From the Main Menu, choose Purchasing:



Then choose
Requisitions:



Then choose Add/Update
Requisitions:




To add a new Requisition, Click  :

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

All text should be entered in upper/lower case.

➤ Requisition Header

Requester - defaults based on your logon;
Requisition Date - defaults to the current date;
Origin defaults to KNG - Change to: CR = College Requisition;
 Click the  and Select CR ;

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

Maintain Requisitions





Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit Requisition NEXT ID Budget Status Not Chk'd

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

Header ?


*Requester kristenbellotti  Bellotti Kristen
 *Requisition Date 03/04/2019  [Requisition Info](#)
 Origin KNG  Kingston
 *Currency Code USD Dollar
 Accounting Date 03/04/2019 

[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 |  First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

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

Save Notify Refresh Add



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

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

➤ Requisition Defaults

Buyer – Leave Blank;

Unit of Measure – Leave Blank;

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

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

Requisition Defaults






Business Unit URIPS Requisition Date 03/04/2019
 Requisition ID NEXT Status Open

Default Options ?






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

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

Line

Buyer  Unit of Measure 
 Supplier  Supplier Location 
 Category  [Supplier Lookup](#)

Schedule


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








One Time Address

Distribution

SpeedChart

Distributions

Details Asset Information 

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

OK Cancel Refresh

➤ Supplier Lookup/Search

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

Supplier Search

Search Criteria

Name Short Name

Alternate Supp Name

City State

Country Postal

Class Type

Max Rows

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

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

Supplier Detail Address

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

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

Click

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

Supplier Search

Search Criteria

Name Short Name

Alternate Supp Name

City State

Country Postal

Class Type

Max Rows

1 to 3 of 3


Search Results Personalize | Find | View 4 | First 1 of 3 Last

Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>	0000031469	MAIN	1	GLOBEWIRE-001	Globe Wireless LLC	N
<input type="checkbox"/>	0000055491	MAIN	1	GLOBEXINDU-001	Globex Industries Inc	N
<input type="checkbox"/>	0000056841	MAIN	1	GLOBEPHARM-001	GlobePharma, Inc	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 construction project costing \$50,000 or more, the category is “Construction in Progress >\$50K”. The category will populate the account; i.e.; Category 655A = Account 9655. Choose the appropriate Category based on the goods/services you are requisitioning -- Click on the  to choose the correct Category.

Note: Only one Category can be used per Line Item.

- If you are Requisitioning multiple Items with the same Category, you may select the Category here.
- Otherwise, if you are Requisitioning multiple Items with multiple Categories, do not enter a Category Code here.
- Instead, you will need to enter the Category Codes on each Line Item on the main Requisition screen. [For more information, see page 19.](#)

Requisition Defaults

Business Unit URIPS

Requisition Date 03/04/2019

Requisition ID NEXT

Status Open

Default Options ?

☐ Default

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

☒ Override

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

Line

Buyer

Unit of Measure

Supplier 0000055491

Globex Industries Inc

Supplier Location MAIN

Category

[Supplier Lookup](#)

Schedule

Ship To

*Distribute By Amount

Due Date

Ultimate Use Code

Ship Via BEST WAY

Attention To

Freight Terms FOB DEST

One Time Address

Distribution

SpeedChart

Distributions

Details Asset Information

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

OK

Cancel

Refresh

Search by either the Category Number (i.e.: 655) or Description (i.e.: Construction) and click

Look Up

or Select from the "Search Results".

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



Look Up

Look Up Category

SetID: begins with

Category: begins with

Description: begins with

Look Up **Clear** **Cancel** [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, em
URIPS 263A		Education/Prof/Artistic Svcs	Educational, professional, arti

Example of Search by Description

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

Look Up

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

Look Up Category

SetID begins with

Category begins with

Description begins with

Look Up **Clear** **Cancel** [Basic Lookup](#)

Search Results

[View 100](#)

SetID	Category	Description	Category Comments
URIPS 655A		Construction in Progress >\$50K	Expenditures related to sta

Note:

You can also search Category and Description by using the

pull down menu. Your choices are:

begins with

contains

=

not =

<

<=

>



>=

between

in

➤ Ship To Location

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

- If you know the four-digit Department Number where the goods/services are being delivered you may enter that number in the **Ship To:** field, click  and select from the Search Results;
- OR
- Search by the Department Name by clicking the  next to the Ship To field, type the Department Name in the Description field, click **Look Up** and select from the Search Results.

Requisition Defaults




Business Unit URIPS Requisition Date 03/04/2019
 Requisition ID NEXT Status Open

Default Options ?





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

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

Line

Buyer Unit of Measure
 Supplier 0000055491  Globex Industries Inc Supplier Location MAIN 
 Category 655A  [Supplier Lookup](#)

Schedule


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


One Time Address

Distribution


SpeedChart

Distributions

Details Asset Information 

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

OK Cancel Refresh

In those rare instances where goods/services are not being delivered to the University, type "offsite" in the Ship To field and click . Select OFFSITE. The following message will appear:

Click

OK

Message

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

OK

The complete Ship To address will need to be entered as a Comment in the Requisition Header Comments section and [is described on page 31](#).

➤ Distribute By, Due Date & Distributions

The following fields are not used and should not be changed:

Distribute By: Defaults to “Amount” – DO NOT CHANGE.

Due Date: For OCP Requisitions on non-OCP Funds, the Due Date is to be entered on the Line and [will be described later on page 24](#).

Distributions: For OCP Requisitions on non-OCP Funds, the Distribution(s) will be entered on the Line and [will be described later on page 25](#).

Requisition Defaults

Business Unit URIPS Requisition Date 03/04/2019
 Requisition ID NEXT Status Open

Default Options ?

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

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

Line

Buyer Unit of Measure
 Supplier 0000055491 Globex Industries Inc Supplier Location MAIN
 Category 655A [Supplier Lookup](#)

Schedule

Ship To 4046-001-B Capital Projects ***Distribute By** Amount
 Due Date
 Ultimate Use Code Ship Via BEST WAY
 Attention To Freight Terms FOB DEST
 One Time Address

Distribution

SpeedChart

Distributions

Details Asset Information

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

OK Cancel Refresh



Click and you will be returned to the Maintain Requisitions page:

➤ Line Items

On the main Requisition page:

Description – Type the Description of the item being ordered (i.e.: Construction of Hillside Residence Hall).

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

Maintain Requisitions

Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit Requisition NEXT Budget Status Not Chk'd

ID Requisition Name ☒ Hold From Further Processing

[Copy From](#) Return: ☐

Header ?

*Requester kristenbellotti Bellotti, Kristen

*Requisition Date 03/04/2019 [Requester Info](#)

Origin CR College Requisition

*Currency Code USD Dollar

Accounting Date 03/04/2019

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

[Requisition Activities](#)

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

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

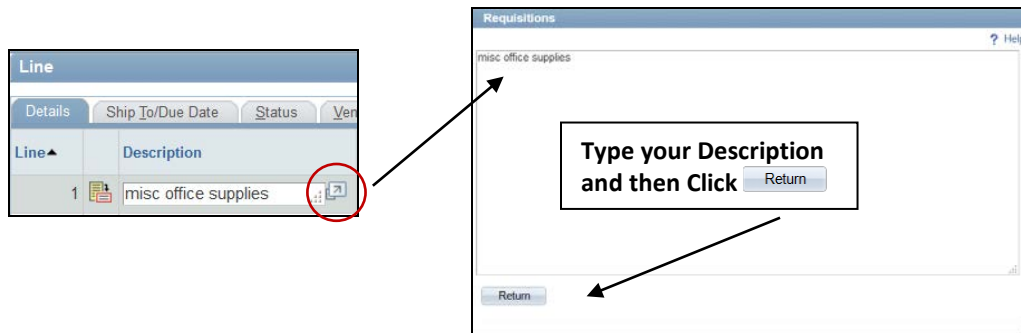
Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Construction of Residence Hall	0.0000			0	0.00	Open	

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

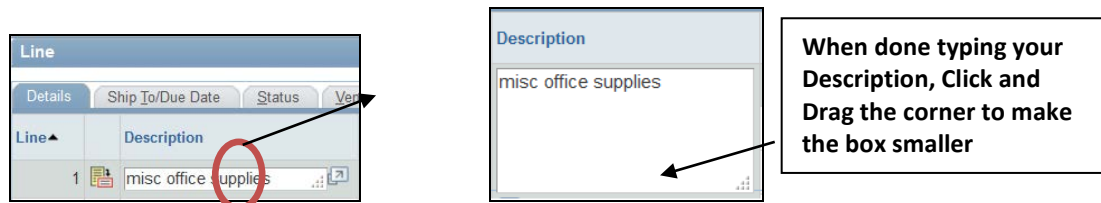
[Save](#) [Notify](#) [Refresh](#) [Add](#)

There are 4 ways to enter the Line Item Description:

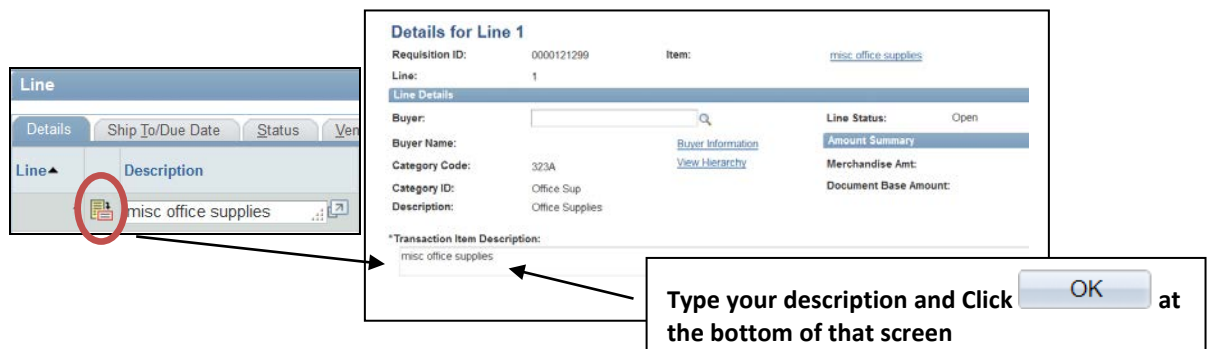
1 – Click on the  at the end of the Description to access the entire Description area:



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




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.

Requisition




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

*Requester: kristenbellotti Bellotti, Kristen
*Requisition Date: 03/04/2019 Requisition Info
Origin: CR College Requisition
*Currency Code: USD Dollar
Accounting Date: 03/04/2019

Requisition Defaults Add Comments
Requisition Activities

Amount Summary
Total Amount: 0.00 USD

Add Items From
Purchasing Kit Catalog
Item Search Requester Items

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Construction of Residence	0.0000		655A	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 34.

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

Check the

☒ Send to Supplier
box as well.

Click 
when done.

Line Comments

Business Unit: URIPS
Requisition ID: NEXT
Requisition Date: 03/04/2019
Status: Open
Line: 1

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

Comments
Use Standard Comments
Use Item Specifications
Comment Status: Active
Inactivate

Materials for construction; special instructions for this line.

☒ 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:

Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit Requisition NEXT ID Budget Status Not Chk'd

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

Header ?

*Requester kristenbellotti Bellotti, Kristen

*Requisition Date 03/04/2019 Requisition Info

Origin CR College Requisition

*Currency Code USD Dollar

Accounting Date 03/04/2019

Requisition Defaults Add Comments

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requisition Items

Line ? Personalize | Find | View All | 1.3 of 3 | Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Construction of Residence	0.0000		655A	0	0.00	Open	
2		0.0000			0	0.00	Open	
3		0.0000			0	0.00	Open	

➤ Quantity

Type the Quantity (i.e.: 1):

Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit Requisition NEXT ID Budget Status Not Chk'd

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

Header ?

*Requester kristenbellotti Bellotti, Kristen

*Requisition Date 03/04/2019 Requisition Info

Origin CR College Requisition

*Currency Code USD Dollar

Accounting Date 03/04/2019

Requisition Defaults Add Comments

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requisition Items

Line ? Personalize | Find | View All | 1.3 of 3 | Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Construction of Residence	1.0000		655A	0.00000	0.00	Open	

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

Save Notify Refresh Add

➤ Unit of Measure

Enter the Unit of Measure - UOM (i.e.: TOT):

The screenshot shows the 'Line 1' details for 'Construction of Residence'. The 'UOM' field is highlighted with a red circle and contains the value 'TOT'. The 'Category' field contains '655A'. The 'Price' field is empty. The 'Merchandise Amount' is 0.00. The 'Status' is 'Open'. The 'View Printable Version' link is visible. The 'Save', 'Notify', and 'Refresh' buttons are at the bottom left. The 'Add' button is at the bottom right.

➤ Category

Note: the Category has populated from the Requisition Defaults.
DO NOT CHANGE

The screenshot shows the 'Line 1' details for 'Construction of Residence'. The 'Category' field is highlighted with a red circle and contains the value '655A'. The 'UOM' field contains 'TOT'. The 'Price' field is empty. The 'Merchandise Amount' is 0.00. The 'Status' is 'Open'. The 'View Printable Version' link is visible. The 'Save', 'Notify', and 'Refresh' buttons are at the bottom left. The 'Add' button is at the bottom right.

REMINDER:
Only one Category
Code can be used
per line

➤ Price

Enter the Total Anticipated Cost. You only need to use a decimal when the Unit Price is in dollars and cents.

The screenshot shows the 'Line 1' details for 'Construction of Residence'. The 'Price' field is highlighted with a red circle and contains the value '650,000.000'. The 'UOM' field contains 'TOT'. The 'Category' field contains '655A'. The 'Merchandise Amount' is 650,000.00. The 'Status' is 'Open'. The 'View Printable Version' link is visible. The 'Save', 'Notify', and 'Refresh' buttons are at the bottom left. The 'Add' button is at the bottom right.

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

The screenshot shows the 'Line 1' details for 'Construction of Residence'. The 'Schedule' icon is highlighted with a red circle. The 'UOM' field contains 'TOT'. The 'Category' field contains '655A'. The 'Price' field contains '650,000.000'. The 'Merchandise Amount' is 650,000.00. The 'Status' is 'Open'. The 'View Printable Version' link is visible. The 'Save', 'Notify', and 'Refresh' buttons are at the bottom left. The 'Add' button is at the bottom right.

➤ **Ship To**

Defaults from the Requisition Defaults page. *Please note:* When a PO is generated for a Capital Projects Requisition, the Ship-To and the Bill-To addresses will be the same.

Maintain Requisitions

Schedule

Business Unit: URIPS Requisition Date: 03/04/2019
 Requisition ID: NEXT Status: Open

[Return to Main Page](#)

Line	Item	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	Construction of Residence Hall	1.0000	650,000.0000	650,000.00		Bellotti, Kristen	Active

Schedule Details


Sched	Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	4046_0	K	1.0000	650,000.0000	650,000.00		Bellotti, Kristen	Active

[Add Ship To Comments](#)

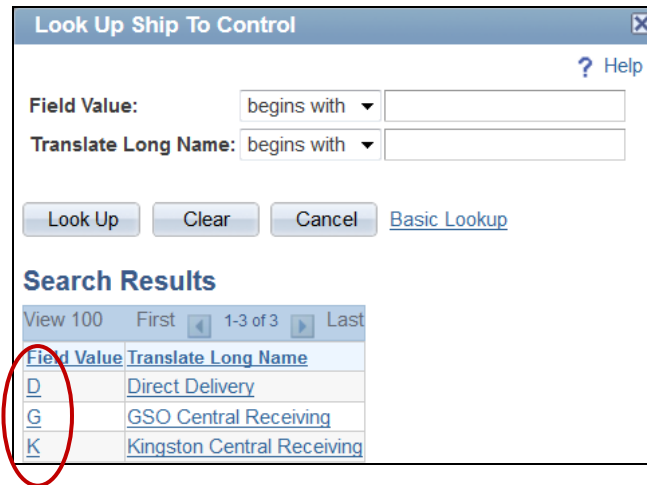
Save Notify Refresh Add Update/Display

➤ **Ship To Control**

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 03/04/2019
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Quantity	Total	Merchandise Amt
1	Construction of Residence Hall	1.0000		650,000.00 USD

Schedule

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

Details

Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	4046_0	K	1.0000	650,000.0000	650,000.00		Bellotti, Kristen	Active

[Add Ship To Comments](#)

Save Notify Refresh Add Update/Display

**** If you have chosen an OFFSITE Ship To Location, do not access the**

[Add/Edit Comments](#)

➤ **Note:** The Ship To chosen on the Requisition Defaults page will be the only default choice.

➤ In the Comment Box type the name only of the individual/ room/lab that the shipment should be addressed to.

➤ When done, Click

OK

Requisition Ship To Comments

Business Unit URIPS Requisition Date 03/04/2019
 Requisition ID NEXT Status Open

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments

Use Standard Comments Ship To 4046_001_B Comment Status Active Inactivate

Project Manager - Paul DeRosa

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

Associated Document

Attach View Delete Email

From: 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
Central Receiving
22 Tootell Road
Attention: Project Manager - Paul DePace

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** 03/04/2019
Requisition ID NEXT **Status** Open

[Return to Main Page](#)

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

1	Item	Construction of Residence Hall	Quantity	1.0000	Total	Merchandise Amt	650,000.00 USD
---	------	--------------------------------	----------	--------	-------	-----------------	----------------

Schedule [Personalize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

Details

Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	4046_0	K	1.0000	650,000.0000	650,000.00		Bellotti, Kristen	Active

[Add Ship To Comments](#)

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

➤ Due Date

Enter the due date. **Note:** the Due Date should be reflective of the estimated completion date on the entire project.

Maintain Requisitions

Schedule

Business Unit: URIPS Requisition Date: 03/04/2019
 Requisition ID: NEXT Status: Open

[Return to Main Page](#)

Line	Item	Quantity	Total	Merchandise Amt
1	Construction of Residence Hall	1.0000		650,000.00 USD

[Personalize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Schedule Details

Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	4046_0	K	1.0000	650,000.0000	650,000.00	03/31/2020	Bellotti, Kristen	Active

[Add/Edit Comments](#)

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

Click on the Distribution  icon.

You will receive this 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](#)

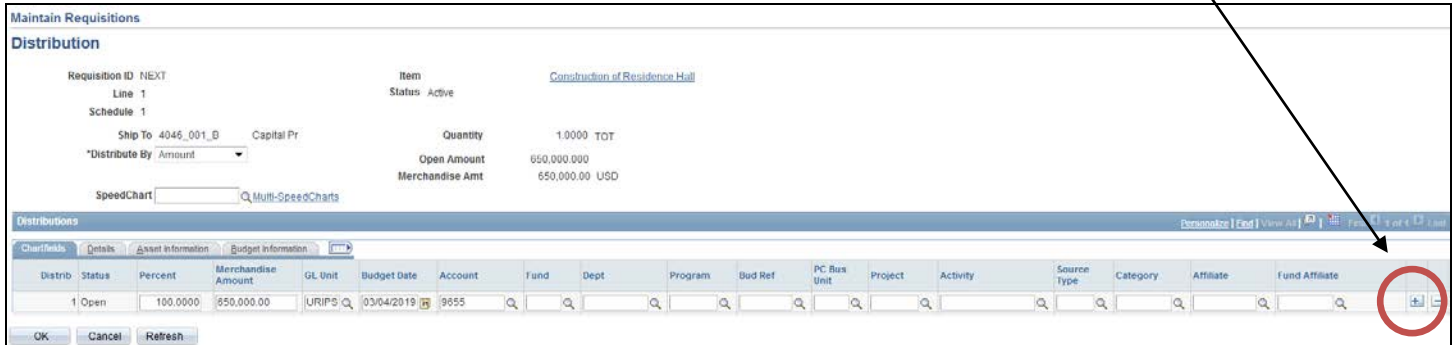
Click


[OK](#)

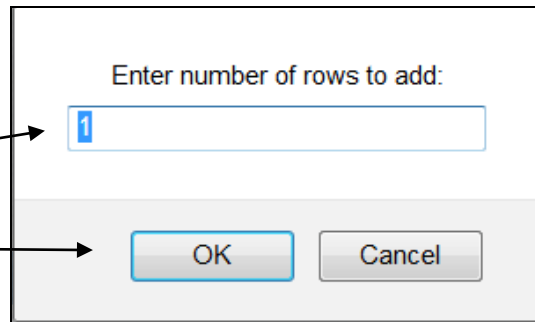
You will now enter the Distributions for the Line:

➤ Entering Distributions on the Line

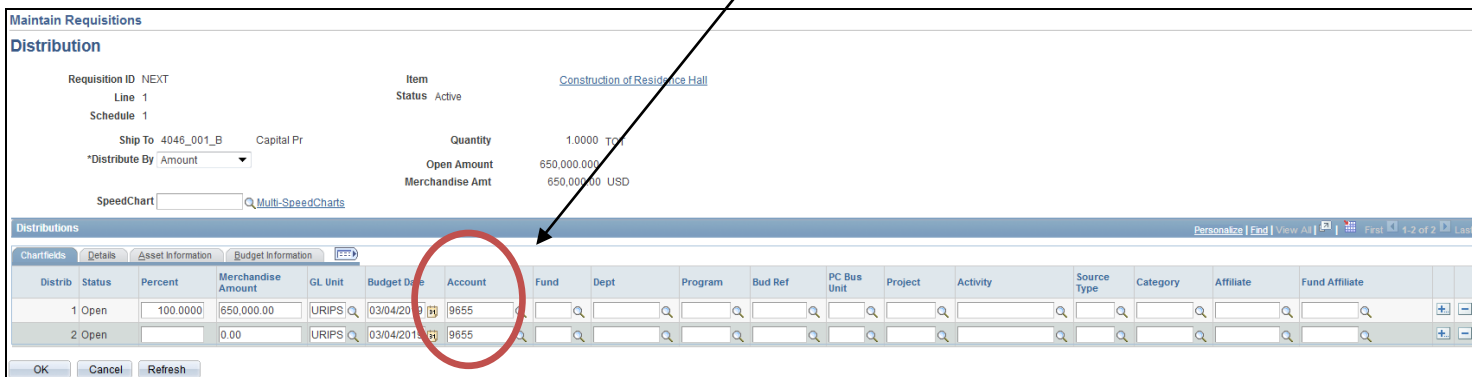
When Distributing by more than one ChartField String, Click  to add the desired number of rows:



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



Initially, the Category 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 #**



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

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

Maintain Requisitions
Distribution

Requisition ID: NEXT
Line: 1
Schedule: 1

Ship To: 4046_001_B Capital Pr
*Distribute By: Amount

Item: Construction of Residence Hall
Status: Active
Quantity: 1.0000 TOT
Open Amount: 650,000.000
Merchandise Amt: 650,000.00 USD

SpeedChart: Multi-SpeedCharts

Distributions

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account
1	Open	100.0000	650,000.00	URIPS	03/04/2019	9655
2	Open		0.00	URIPS	03/04/2019	9655

OK Cancel Refresh

The Budget Date defaults to the current date.



The Budget Date for OCP Requisitions on Non-OCP Funds will be reflective of the Start Date of the Project. If for any reason Funds are to cross Fiscal Years, the Budget Date should not go beyond the future Fiscal Year. Therefore, at most, the current Fiscal Year and the future Fiscal Year can be used. (Example: Project starts in June but little work will be done that month; \$25,000 on fund 430 in FY 19 & \$2,000,000.00 on fund 430 in FY20.



Important Note: Budget Dates for a future Fiscal Year should always be the first date of that year; i.e. 7/1/18; 7/1/19; etc. Never use the end date of the future Fiscal Year on OCP Requisitions using Non-OCP funds.

When done entering Distribution information for this line, Click  to return to the Schedule page.

Maintain Requisitions
Distribution

Requisition ID: NEXT
Line: 1
Schedule: 1

Ship To: 4046_001_B Capital Pr
*Distribute By: Amount

Item: Construction of Residence Hall
Status: Active
Quantity: 1.0000 TOT
Open Amount: 650,000.000
Merchandise Amt: 650,000.00 USD

SpeedChart: Multi-SpeedCharts

Distributions

Distrib	Status	Percent	Merchandise Amount	GL Unit	Budget Date	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity
1	Open	50.0000	325,000.00	URIPS	07/01/2018	9655	100	4055	0000				
2	Open	50.0000	325,000.00	URIPS	07/01/2018	9655	110	4061	0000				

OK Cancel Refresh

Maintain Requisitions

Schedule

Business Unit URIPS Requisition Date 03/04/2019
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Quantity	Total	Merchandise Amt
1	Construction of Residence Hall	1.0000		650,000.00 USD

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

Schedule

[Personalize](#) | [Find](#) | [View All](#) | [First](#) | 1 of 1 | [Last](#)

[Details](#) | [Add](#)

Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	4046_0	K	1.0000	650,000.0000	650,000.00	03/31/2020	Bellotti, Kristen	Active

[Add/Edit Comments](#)

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

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

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

[Make a new Line by following the instructions on Page 29.](#)

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

When you are done entering all of the ChartField Strings and Lines,

Click [Save](#) to save the Requisition.

You will receive this 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

➤ Requisition ID

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

Requisition

Business Unit: URIPS
 Requisition ID: 0000152230
 Requisition Name: 0000152230

Requires State Approval: ☐ Resubmit

Budget: Go to page 29 to [add additional Line Items](#)
or
Go to page 31 to [add Comments](#)
or
Go to page 34 to [add Attachments.](#)

Return: ☐

Header

*Requester: kristenbellotti Bellotti, Kristen
 *Requisition Date: 03/04/2019
 Origin: CR College Requisition
 *Currency Code: USD Dollar
 Accounting Date: 03/04/2019

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

Total Amount: 650,000.00 USD

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

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	Construction of Residence	1.0000	TOT	655A	650,000.00	650,000.00	Open

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

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#)

➤ To Add Additional Line Items

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

Requisition

Business Unit: URIPS
 Requisition ID: 0000152230
 Requisition Name: 0000152230

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

Header

*Requester: kristenbellotti Bellotti, Kristen
 *Requisition Date: 03/04/2019 Requester Info
 Origin: CR College Requisition
 *Currency Code: USD Dollar
 Accounting Date: 03/04/2019

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

Amount Summary

Total Amount: 650,000.00 USD

Add Items From

Purchasing Kit Catalog
 Item Search Requester Items

Select Lines To Display

Search for Lines
 Line To Retrieve

Line

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Construction of Residence	1.0000	TOT	655A	650,000.00	650,000.00	Open

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

Save Return to Search Notify Refresh Add

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

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

Click .

Two blank lines will be added to the PO

Enter number of rows to add:

OK Cancel

Requisition

Business URIPS

Requires State Approval: ☐

Resubmit

Status Open

Unit

Requisition 0000152230

ID

Requisition Name 0000152230

Budget Status Not Chk'd

Return: ☐

☒ Hold From Further Processing

Header

*Requester kristenbellotti Bellotti, Kristen
 *Requisition Date 03/04/2019 Requisition Info
 Origin CR College Requisition
 *Currency Code USD Dollar
 Accounting Date 03/04/2019

[Requisition Defaults](#)

[Add Comments](#)

[Requisition Activities](#)

[Document Status](#)

Amount Summary

Total Amount 650,000.00 USD

Add Items From

Purchasing Kit

Catalog

Item Search

Requester Items

Select Lines To Display

Search for Lines

Line To

Retrieve

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status						
1	Construction of Residence	1.0000	TOT	655A	650,000.0000	650,000.00	Open						
2		0.0000			0	0.00	Open						
3		0.0000			0	0.00	Open						

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

- 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:

Message

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

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

Click 



➤ Adding Header Comments

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

Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit Requisition 0000152230 ID Budget Status Not Chk'd

Requisition Name 0000152230 Return: ☐ ☒ Hold From Further Processing

Header ?

*Requester kristenbellotti Bellotti, Kristen
*Requisition Date 03/04/2019 Requester Info
Origin CR College Requisition
*Currency Code USD Dollar
Accounting Date 03/04/2019

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

Amount Summary ?

Total Amount 650,000.00 USD

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

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

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Construction of Residence	1.0000	TOT	655A	650,000.0000	650,000.00	Open

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

Save Return to Search Notify Refresh Add

Identify the Project Manager and his/her contact information by entering it in the Header Comment field as follows:

Header Comments

Business Unit URIPS Requisition Date 03/04/2019
 Requisition ID 0000152230 Status Open

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

Comments Find View All First 1 of 1 Inactivate +

[Use Standard Comments](#) Comment Status Active

Project Manager
 Paul DePace
 401-874-2725

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

Associated Document

Attachment Attach View Delete Email

From -> REQ URIPS-0000152230

OK Cancel Refresh

Check the ☒ Send to Supplier box

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

To add additional Header Comments, Click +

If an "OFFSITE" Ship To Location was chosen, enter the entire Ship To Address in the Header Comment field as follows:

Comments Find View All First 2 of 2 Inactivate

[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-0000152230

OK Cancel Refresh

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

Header Comments

Business Unit URIPS Requisition Date 03/04/2019
Requisition ID 0000152230 Status Open

☒ Retrieve Active Comments Only Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments

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

Send to Supplier Show at Receipt

Associated Document

Attachment Attach View Delete Email

From -> REQ URIPS-0000152230

OK Cancel Refresh

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

Standard Comments

Comments

*Action: Copy Comment

Comment Type: Comment ID:

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

Description:

Short Desc:

Comments:

OK Cancel Refresh

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

Look Up Comment Type

SetID: URIPS

Standard Comment Type: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

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

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

Standard Comments

Comments

*Action: Copy Comment

Comment Type: REQ Comment ID:

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

Description:

Short Desc:

Comments:

OK Cancel Refresh

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

Look Up Comment ID

SetID: URIPS

Standard Comment Type: REQ

Standard Comment ID: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

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

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

Standard Comments

Comments

*Action: Copy Comment

Comment Type: REQ

Comment ID: BLKT

*Effective Date: 10/31/2017

*Status: Active

Description: Blanket Requirements:

Short Desc: Blanket Re

Comments: Blanket Requirements: mm/dd/yr - mm/dd/yr
Goods or Services can only be delivered and/or performed during the period indicated above.

OK Cancel Refresh

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:

Header Comments

Business Unit URIPS Requisition ID 0000152230 Requisition Date 03/04/2019 Status Open

☒ Retrieve Active Comments Only Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 4 of 4 Last

Use Standard Comments Comment Status Active Inactivate +

BCCQ Approval Letter

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

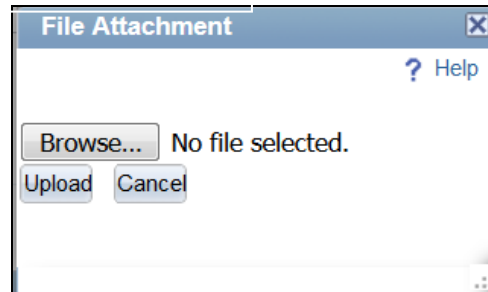
Associated Document

Attachment
Attach View Delete Email

From -> REQ URIPS-0000152230

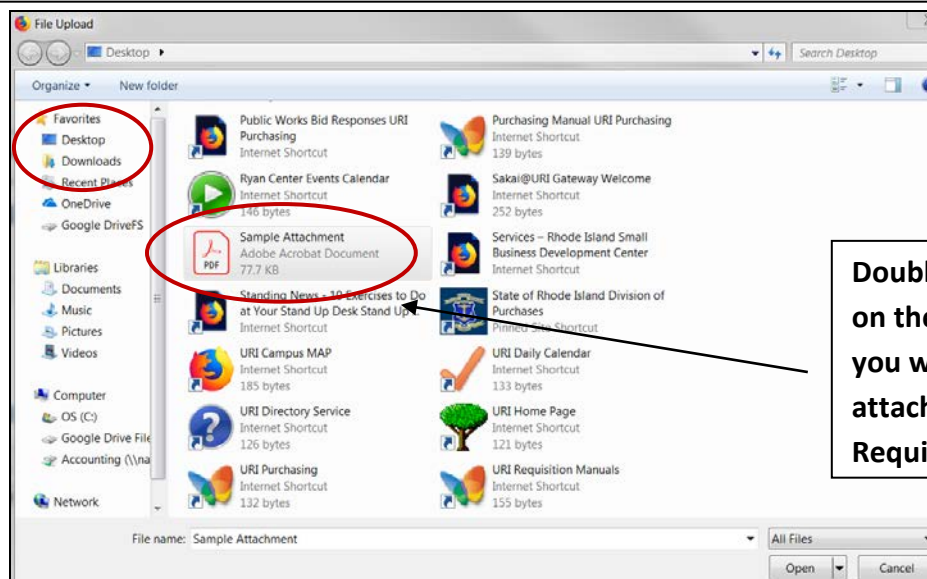
OK Cancel Refresh

This message will appear:

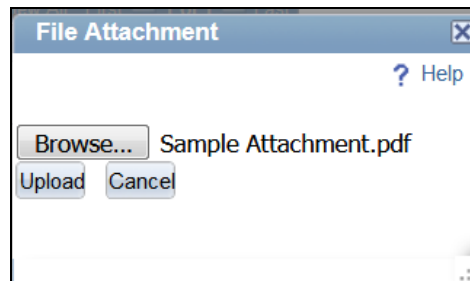


Click **Browse...**

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 BCCO Approval Letter, the e-mail check box will not be checked.

Header Comments

Business Unit URIPS Requisition Date 03/04/2019
Requisition ID 0000152230 Status Open

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

Comments [Find](#) | [View All](#) [First](#) 4 of 4 [Last](#)
[Use Standard Comments](#) Comment Status Active

BCCO Approval Letter ☒

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


Associated Document
Attachment Sample_Attachment.pdf ☐ Email

From -> REQ URIPS-0000152230

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](#) | [View All](#) [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 03/04/2019
Requisition ID 0000152230 Status Open

☒ Retrieve Active Comments Only
*Sort Method *Sort Sequence

Comments [Find](#) | [View 1](#) First 1-3 of 3 Last


[Use Standard Comments](#) Comment Status Active 

Project Manager
Paul DePace
401-874-2725

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

Associated Document
Attachment ☐ Email

From -> REQ URIPS-0000152230


[Use Standard Comments](#) Comment Status Active 

Blanket Requirements: 07/01/2018 - 03/31/2020
Goods or Services can only be delivered and/or performed during the period indicated above.

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

Associated Document
Attachment ☐ Email

From -> REQ URIPS-0000152230


[Use Standard Comments](#) Comment Status Active 

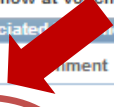
BCCO Approval Letter

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

Associated Document
Attachment ☐ Email

From -> REQ URIPS-0000152230



 **Click when done.**

This will bring you back to the main Requisition screen:

Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Open

Unit Requisition 0000152230 ID Budget Status Not Chk'd

Requisition Name 0000152230 Return: ☐ ☒ Hold From Further Processing

Header ?

*Requester kristenbellotti Bellotti, Kristen
 *Requisition Date 03/04/2019 Requester Info
 Origin CR College Requisition
 *Currency Code USD Dollar
 Accounting Date 03/04/2019

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

[Requisition Activities](#) [Document Status](#) Total Amount 650,000.00 USD

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

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

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Construction of Residence	1.0000	TOT	655A	650,000.0000	650,000.00	Open

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

Save Return to Search Notify Refresh

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

This message will appear:

Message

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

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

OK

Click **OK**

You are now ready to Print your Requisition.

➤ Print the Requisition

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

Requisition

Business URIPS
Unit
Requisition ID 0000152230
Requisition Name 0000152230

Requires State Approval: ☐ Resubmit

Status Open

Budget Status Not Chk'd

Return: ☐ ☒ Hold From Further Processing

Header ?

*Requester kristenbellotti Bellotti, Kristen
*Requisition Date 03/04/2019 Requirer Info
Origin CR College Requisition
*Currency Code USD Dollar
Accounting Date 03/04/2019

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

[Requisition Activities](#)

[Document Status](#)

Amount Summary ?

Total Amount 650,000.00 USD

Add Items From ?

Purchasing Kit Catalog
Item Search Requester Items

Select Lines To Display ?

[Search for Lines](#)

Line To Retrieve

Line ?

Personalize Find View All First 1 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Construction of Residence	1.0000	TOT	655A	650,000.0000	650,000.00	Open

[View Printable Version](#)

*Go to ...More...

Save Return to Search Notify Refresh Add

This message may appear:

Click

Yes

Message

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

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

Yes

No

The following message will appear:

Click

OK

Message

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

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

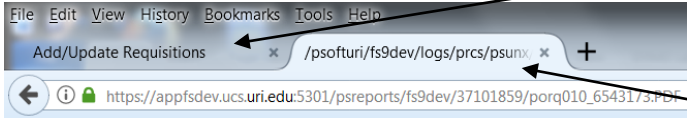
OK

➤ A new window will open in PeopleSoft and will display the Printable Version of the Requisition. Check it for accuracy.

A second tab will open as the Printable Version queues and then prints to the screen.

Proofread this copy to make sure all information is correct.

If any changes need to be made, close this tab and go back to the Add/Update Requisitions tab to make and save changes to the Requisition and then Click [View Printable Version](#) again.



Tab 1 = Add/Update Reqs

Tab 2 = Printable Version of Req

College Requisition

This Form is for Internal Use Only

Suggested Vendor Name: Globex Industries Inc
Vendor Address: 15 Broom Street
 Providence, RI 02905
Vendor#: 0000055491

Ship To: URI Central Receiving
 Kingston, RI 02881
 Office of Capital Projects
 60 Tootell Rd., Sherman Bldg.
Attention: Project Manager - Paul DePace

Business Unit:	URIPS	OPEN
Date	Page	Req ID:
03/04/2019	1	0000152230
Requester	E-mail for Receiving Report	
Bellotti, Kristen	kristenbellotti@discard.uri.edu	
Requester Dept.	Phone #	Fax #
Research Purchasing	401/874-2325	401/874-2306

Attachments: N

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
<p>Blanket Requirements: 07/01/2018 - 03/31/2020</p> <p>Goods or Services can only be delivered and/or performed during the period indicated above.</p>						
1-1	Construction of Residence Hall	1.0000	TOT	650,000.0000	650,000.00	03/31/2020
Materials for construction; special instructions for this line.						

Project Manager
Paul DePace
401-874-2725

BCCO Approval Letter

Total Requisition Amount: 650,000.00

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2019	1-1-1	9655-100-4055-0000			325,000.00	
FY2019	1-1-2	9655-110-4061-0000			325,000.00	

For purchasing use only

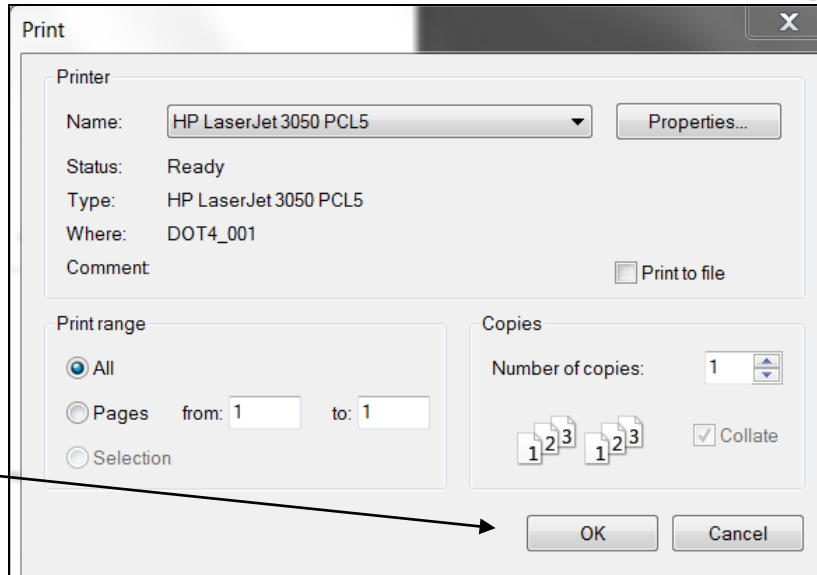
Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk Date

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

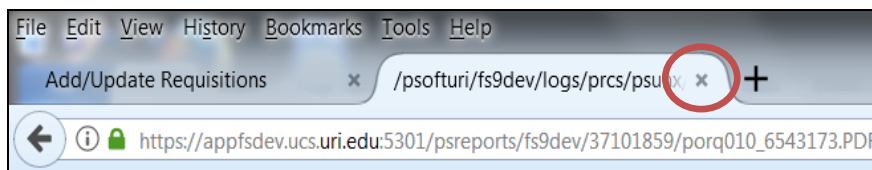


The Print box window comes up; choose where to Print your Requisition and Click

OK



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



If necessary, make any changes to the Req that need to be made.

When the Requisition is complete, uncheck the ☒ **Hold From Further Processing** box.

The screenshot shows the 'Requisition' form. At the top right, the 'Status' is 'Open' and 'Budget Status' is 'Not Chk'd'. Below these, the checkbox 'Hold From Further Processing' is checked and circled in red. An arrow points from the instruction text above to this checkbox. The form includes fields for Business (URIPS), Unit, Requisition ID (0000152230), and Requisition Name (0000152230). It also has a 'Return' checkbox and a 'Resubmit' button. The 'Header' section contains fields for Requester (Kristen Bellotti), Requisition Date (03/04/2019), Origin (CR), Currency Code (USD), and Accounting Date (03/04/2019). There are links for 'Requisition Defaults', 'Requisition Activities', and 'Document Status'. The 'Amount Summary' shows a 'Total Amount' of 650,000.00 USD. The 'Add Items From' section has options for 'Purchasing Kit' and 'Catalog'. The 'Select Lines To Display' section has a 'Search for Lines' button. The 'Line' table has one row: Line 1, Description 'Construction of Residence', Quantity 1.0000, UOM TOT, Category 655A, Price 650,000.000, Merchandise Amount 650,000.00, and Status Open. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'.

Click on ☒ to Submit for Approval and Click **Save**


The screenshot shows the 'Requisition' form after the 'Hold From Further Processing' checkbox has been unchecked. The checkbox is now empty. The 'Status' is still 'Open'. An arrow points from the instruction text above to the 'Save' button at the bottom left, which is circled in red. The rest of the form content is identical to the previous screenshot.



Note: The Status has changed from “open” to “pending”.

If you click on the  you will CANCEL the requisition.

Requisition

Business URIPS Requires State Approval: ☐ Resubmit Status Pending  Clicking the Red X will cancel the Requisition

Unit Requisition ID 0000152230 Budget Status Not Chk'd

Requisition Name 0000152230 Return: ☐ Hold From Further Processing ☐

Header ?

*Requester kristenbellotti Bellotti, Kristen
*Requisition Date 03/04/2019 Requester Info
Origin CR College Requisition
*Currency Code USD Dollar
Accounting Date 03/04/2019

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

Total Amount 650,000.00 USD

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

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

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

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Construction of Residence	1.0000	TOT	655A	650,000.0000	650,000.00	Approved

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

Save Return to Search Notify Refresh Add

The Requisition has now entered the Workflow Approval Process.

Once this happens the Requisition cannot be retrieved.

➤ Workflow Approval Process

Level CP - If the Req originates in the Office of Capital Projects on a non-OCP Fund

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 CP) will receive this e-mail:

This e-mail is to notify you that College Requisition: 0000019924, is seeking approval from The Office of Capital Projects and has been added to your e-Campus Financials Worklist.

Note: CP approval of the Requisition will also satisfy Level 4 when Account 5262, 5362, 9655 and 9656 are used.

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

Note: All approval levels have the authority to Approve or Deny a Requisition.

Once the Office of Capital Projects approves the Requisition, Level 1 Approver(s) will receive an e-mail:

This e-mail is to notify you that College Requisition: 0000019924, Requester: lorachoquette, is seeking level 1 approval for Chartfield String: URIPS10040550000, and has been added to your e-Campus Financials Worklist.

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: 000019924 entered on 02/13/2012 has been denied by OPRID: pauldepace

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 51.](#)

If the Approver(s) (CP) and (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: 000019924 entered on 02/13/2012 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: 000019924 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 =

Requisition ID begins with

Requisition Status =

Requisition Date =

Origin begins with

Requester begins with

Requester Name begins with

Hold From Further Processing ☐

State Req Flag ☐

State Req Reference begins with

State Requisition Date =

☐ Case Sensitive

Search Clear [Basic Search](#) [Save Search Criteria](#)

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

Click on the **Error** hyperlink to determine the cause of the budget error :

Maintain Requisitions

Requisition

Business URIPS Requires State Approval: ☐ Resubmit

Unit Status: Approved

Requisition 0000145713 Budget Status: **Error**

ID Budget Status Not Chk'd

Requisition 0000145713 Hold From Further Processing

Name Return: ☐

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 ?

Requisition Activities Total Amount 3,500.00 USD

Document Status

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

Purchasing Kit Catalog Search for Lines

Item Search Requester Items Line To Retrieve

Line ? 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 ☐ Override Transaction ☐ More Budgets Exist

Maximum Rows: 100 Search Advanced Budget Criteria

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

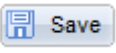
Budget Override	Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1		URIPS	ORG	Exceeds Budget Tolerance	More Detail	<input type="checkbox"/>	Go To ...

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  **Save**.
- In this example, the Requisition will not require Re-Approval and will invoke the Budget Process again.

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

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

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

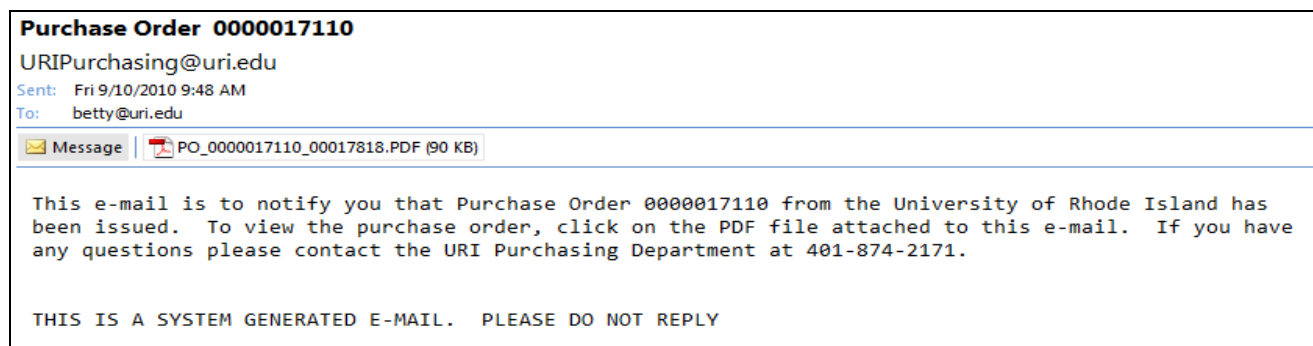
When all is correct:

The URI Purchasing Department will either process a State Requisition and the State Division of Purchases will Solicit the Bid OR the URI Purchasing Department will Solicit the Bid depending on the Source of Funds. Once the Bid has been Solicited and Awarded:

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: 1 Page: 1 of 1
 P.O.# 000007110

Payment Terms: Net 30 Freight Terms: FOB Buyer Ship Via: REG. MAIL
 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, Carliotti Admin. Bldg.
 75 Lower College Rd., Suite 1
 Kingston RI 02881
 (401) 874-2421

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

Vendor: 000004043
 May Foodservice Equip and Design Corp
 51 Washington Ave
 Cranston RI 02920

Tax Exempt? Y Tax Exempt ID: 189

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 (401-222-2050).

Period	Accounts	INTERNAL USE ONLY	Projects	Activity	Category	Requisition ID	PO Type
FY2011	9654-100-4055-0000				654A	2,502.50	107
FY2011	9654-110-4061-0000				654A	2,502.50	

CERTIFICATE
 I HEREBY CERTIFY THAT THE COMPLETED ABOVE HAVE BEEN
 JUST AND PROPERLY OBTAINED AND THAT THE ACCOUNTS LISTED ARE
 BASED UPON THE ONLY AUTHORIZED TO SIGN THIS CERTIFICATE

☒ URI Authorized Individual ☐ Buyer

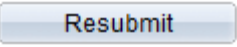
Signature: *Betty Gil*

➤ Returned Requisition

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

From: URIPurchasing@uri.edu [mailto:URIPurchasing@uri.edu]
 Sent: Monday, April 05, 2010 1:46 PM
 To: kevinbanks@uri.edu
 Subject: College Requisition: 000000405 Has Been Returned By URI Purchasing Department

This e-mail is to notify you that College Requisition: 000000405, has been returned by the URI Purchasing Department for the following reason(s):
 Please attach detailed specifications.

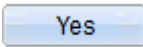
Returned Requisitions will not require Re-Approval through the Workflow Approval Process unless there is a change to the ChartField String or Price. For example, if a Requisition is returned for detailed specifications, the Requester will retrieve the Requisition (see instructions above to retrieve the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

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

Message




This action will create a change order. Continue? (10200,27)

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

Click 

Click 

Uncheck ☒ Hold From Further Processing

 **Status:** Open  

Budget Status: Not Chk'd

☐ **Hold From Further Processing**

Click on 

Status: Open 

The Status will change from Open to Pending

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 Chkd ✗
Requisition Name: 0000019881 ☐ Hold From Further Processing

▼ Header

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

Amount Summary

Total Amount: 5,265.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Select Lines To Display

Line: To: **Retrieve**

Line

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



Line	Description	Quantity	*UOM	Category	Price	Amount	Status
1	Convention Steamer	1.0000	EA	654A	5,265.00000	5,265.00	Pending

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

Example of Returned Requisition:

Maintain Requisitions

Requisition

Business Unit: URIPS Requires State Approval: ☐ Resubmit Status: Approved  

Requisition ID: 0000070803 Budget Status: Valid

Requisition Name: 0000070803

Track Batch: 4 Return: ☒ SeqNum: 10 Please attach detailed specifications. Thank you, Betty

Notify ☒ Hold From Further Processing

Header

*Requester: kgennari Gennari, Kathryn [Requisition Defaults](#)
[Edit Comments](#)
[Requisition Activities](#)
[Document Status](#)

*Requisition Date: 01/12/2015 [Requester Info](#)

Origin: CR College Requisition

*Currency Code: USD Dollar

Accounting Date: 01/12/2015

Amount Summary

Total Amount: 12,000.00
Pre-Encumbrance Balance: 1200.00

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Select Lines To Display

Line: To: Retrieve


Line

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

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

Save Return to Search Notify Refresh

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

To cancel a Requisition click on the .

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.

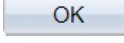
Yes No

Click 

➤ **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 03/04/2019
Requisition ID 0000152230 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 0000055491 Globex Industries Inc Supplier Location MAIN
Category 655A [Supplier Lookup](#)

Schedule

Ship To 4046_001_B Capital Projects *Distribute By Amount
Due Date
Ultimate Use Code Ship Via BEST WAY
Original Ship To code To Freight Terms FOB DEST
One Time Address

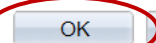
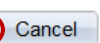
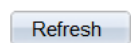
Distribution

SpeedChart

Distributions

Details Asset Information

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

Type in the New Ship To code:

Ship To: 4058_001_S Central Receiving

Then Click



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

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

Business Unit URIPS

Requisition Date 03/04/2019

Requisition ID 0000152230

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 03/04/2019

Requisition ID 0000152230

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.

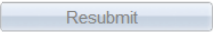

☒ [Mark All](#) ☐ [Unmark All](#)

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:





Requisition

Business Unit URIPS **Requires State Approval:** ☐ **Resubmit**  **Status** Pending 

Requisition ID 0000152230 **Budget Status** Not Chk'd

Requisition Name 0000152230 **Return:** ☐ **Hold From Further Processing** ☐

Header ?

***Requester** kristenbellotti  Bellotti, Kristen
***Requisition Date** 03/04/2019  [Requester Info](#)
Origin CR  College Requisition
***Currency Code** USD Dollar
Accounting Date 03/04/2019 

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

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



Amount Summary ?

Total Amount 650,000.00 USD


Add Items From ?






Purchasing Kit Catalog
 Item Search Requester Items


Select Lines To Display ?






[Search for Lines](#)
 Line  To  **Retrieve**

Line ?

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

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status	
1	Construction of Residence	1.0000	TOT	655A	650,000.000	650,000.00	Approved	    

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

 Save  Return to Search  Notify  Refresh  Add