

THE  
UNIVERSITY  
OF RHODE ISLAND

# PeopleSoft Purchasing Internal Vendor (IV) Requisition



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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*:
  - i) Pre-Approval - (Requester Role)
  - ii) Level 1 – (Signatory from Signature Authorization)
  - iii) Level 2 – (Final Review from Signature Authorization)
  - iv) Level 3 – (Administrative Approvals i.e. Grant/Research and Foundation.)
- 2) **Approver** – User who Approves Requisition or Chartfield String (CFS).
- 3) **Category Code** – Used to categorize the item that is being purchased. Users should select the Category Code that most closely matches the item(s) they are purchasing. The Account Code is defaulted based on the Category selected.
- 4) **Denied Requisition** – Requisition that is sent back to Requester for correction or cancellation.
- 5) **Final Review** – 2nd Level Approver for the CFS – (Optional Approval Level).
- 6) **Hold from Further Processing Checkbox** – When *checked*: the Requisition is on hold; when *unchecked*: the Requisition is available for processing.
- 7) **Origin** – Type of Requisition indicates to the system and users how the Requisition is processed. The two-letter alpha code should be used for Requisitions. The origins are listed below:
  - i) CR – College Requisition - Routed to Purchasing for completion.
  - ii) IV – Internal Vendor Requisition - Purchase order auto generated directly from Req.
  - iii) LV – Limited Value Requisition - Purchase Order auto generated directly from Req.
  - iv) SC – Subcontract Requisition - Routed to the Research Office for completion.
- 8) **Originator** – A user who enters a Requisition but does not have Pre-Approval authority.
- 9) **Pre-Approval Process** – Requisition is entered by an Originator who must have a Requester Approve the Req. The Requester Pre-Approves the Req by clicking the Green Pre-Approve Check which changes the status from Open to Pending to facilitate workflow processing.
- 10) **Requester** – User who has been granted the authority to Pre-Approve Req. The Requester will be the primary contact for Requisitions and/or Purchase Orders.
- 11) **Routing** – The process of electronically moving work.
- 12) **Ship To Location** – Address where the item’s final delivery is shipped.
- 13) **Ship To Control** – Determines where the shipped item is first sent.
- 14) **Ship To Comments** - Field used to Add the Attn: (Person’s Name) to whom the item will be sent.
- 15) **Workflow** – Paperless On-Line work routing system.
- 16) **Worklist** – Approvers work queue, where users manage/review Requisition(s).

## ➤ Components of a Requisition

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

In PeopleSoft, Requisitions consist of five components:

1. **Requisition Header** – This includes the Requester name, Requisition date, Origin, Accounting Date and Header Comments.
2. **Requisition Defaults** – Where general information pertaining to the entire Requisition is entered. This includes data such as the Supplier, Category (\*if all Line Items are of the same Category), Ship To Location and Due Date.
3. **Lines** – Where the Description, Quantity, Unit Of Measure (UOM), Category and Price for each item you are ordering.
4. **Schedule** – Where the Ship To Address, Unit Price and Due Date are stored for each Item on the Requisition.
5. **Distribution** – Where accounting information (i.e. Chartfield String) is entered. The Chartfield String includes the Account, Fund, Department, Program, Project, Activity and Budget Date.

## ➤ Logging Into Peoplesoft

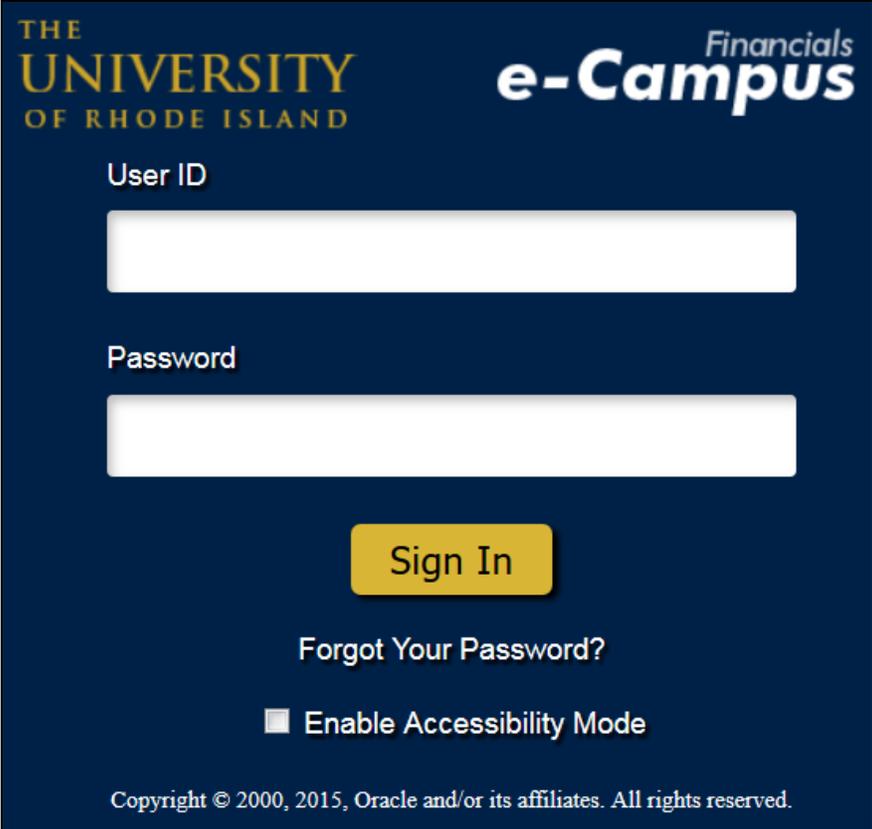
PeopleSoft is to be used in accordance with the URI Access and Compliance Data Confidentiality Statement.

The *Data Confidentiality Statement* can be found here:

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

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

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



THE UNIVERSITY OF RHODE ISLAND

Financials e-Campus

User ID

Password

Sign In

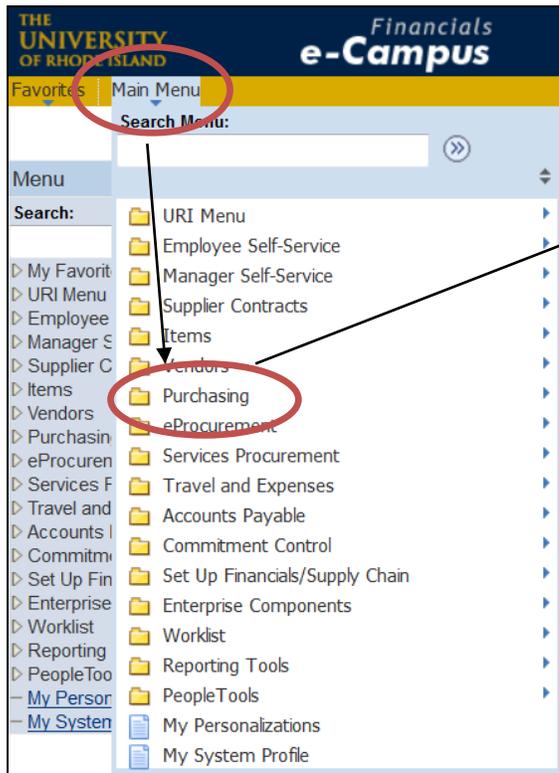
[Forgot Your Password?](#)

Enable Accessibility Mode

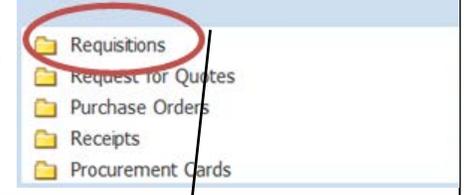
Copyright © 2000, 2015, Oracle and/or its affiliates. All rights reserved.

## ➤ To Add a New Requisition

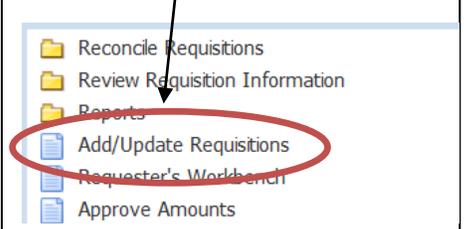
From the Main Menu, choose Purchasing:



Then choose Requisitions:



Then choose Add/Update Requisitions:



To add a new Requisition, Click  :

- 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: IV = Internal Vendor Requisition;

Click the  and Select IV ;

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

**Maintain Requisitions**

### Requisition

Business URIPS  
Unit  
Requisition NEXT  
ID  
Requisition Name

Requires State Approval:  [Resubmit](#) Status Open

Budget Status Not Chk'd

Copy From:  Return:   Hold From Further Processing

**Header**

\*Requester  Bellotti, Kristen  
Requisition Date  [Requisition Info](#)  
Origin  Kingston  
\*Currency Code  Dollar  
Accounting Date  [Requisition Defaults](#) [Add Comments](#)  
[Requisition Activities](#)

**Amount Summary**

Total Amount 0.00 USD

**Add Items From**

Purchasing Kit Catalog  
Item Search Requester Items

**Line**

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

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



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** – If you know the PeopleSoft (PS) Supplier number, you may enter that here; i.e.: URI\_DIN.

If you do not know the PS Supplier number, type “URI\_” and click the ; a list of URI Internal Suppliers will populate; choose the correct one by clicking on it and it will bring the number into the Defaults screen.

**Requisition Defaults**

Business Unit URIPS      Requisition Date 02/14/2019  
 Requisition ID NEXT      Status Open

**Default Options** ?

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

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

**Line**

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

**Schedule**

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

One Time Address

**Distribution**

SpeedChart

**Distributions**

Details    Asset Information    

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project
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"/> 

OK    Cancel    Refresh



**INTERNAL VENDOR (IV) REQUISITIONS REQUIRE THAT A SUPPLIER IS SELECTED.**

➤ Choose a Category

**Category** – is a classification of goods/services. For example, if you are requisitioning food for an event, the Category is “Catering Services”. The Category will populate the account; i.e. Category 269D = Account 5269 . Choose the appropriate Category based on the goods/services you are requisitioning -- Click on the  to choose the correct Category.

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

- If you are Requisitioning multiple Items with the same Category, you may select the Category here.
- Otherwise, if you are Requisitioning multiple Items with multiple Categories, do not enter a Category Code here.
- Instead, you will need to enter the Category Codes on each Line Item on the main Requisition screen. [For more information, see page 20.](#)

**Requisition Defaults**

Business Unit URIPS      Requisition Date 02/14/2019  
 Requisition ID NEA1      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 URI\_DIN   URI Dining Services      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	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"/>

OK    Cancel    Refresh

Search by either the Category Number (i.e.: 269) or Description (i.e.: Catering) 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).

**Example of Search by Description**

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

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

**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 02/14/2019  
 Requisition ID NEXT      Status Open

**Default Options** ?

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

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

**Line**

Buyer       Unit of Measure   
 Supplier URI\_DIN  URI Dining Services      Supplier Location MAIN   
 Category 269D       [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	A
1	<input type="text"/>	URIPS <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.

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

➤ **Due Date & 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 02/14/2019  
Requisition ID NEXT      Status Open

**Default Options** ?

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

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

**Line**

Buyer       Unit of Measure   
Supplier URI\_DIN  URI Dining Services      Supplier Location MAIN   
Category 269D       [Supplier Lookup](#)

**Schedule**

Ship To 2103\_001 S  Chemistry Dept      \*Distribute By Amount

 Due Date  

Ultimate Use Code       Ship Via BEST WA   
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	A
1	<input type="text"/>	URIPS <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.

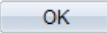
For example:

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%.

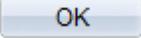
If you are Distributing by one of the following, the ChartField String(s) will be entered on the Line on the Requisition main page and [will be discussed on page 16](#).

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.

The screenshot shows the 'Requisition Defaults' form. At the top, it displays 'Business Unit URIPS' and 'Requisition Date 02/14/2019'. Below this, 'Requisition ID NE' and 'Status Open' are shown. The 'Default Options' section has two radio buttons: 'Default' (unselected) and 'Override' (selected). The 'Line' section contains fields for 'Buyer', 'Supplier' (URI\_DIN), 'Category' (269D), 'Unit of Measure', 'Supplier Location' (MAIN), and 'Supplier Lookup'. The 'Schedule' section includes 'Ship To' (2103\_001\_S Chemistry Dept), 'Due Date' (03/31/2019), 'Ultimate Use Code', 'Attention To', '\*Distribute By' (Amount), 'Ship Via' (BEST WAY), and 'Freight Terms' (FOB DEST). The 'Distribution' section has a 'SpeedChart' field. The 'Distributions' section is highlighted with a red circle and contains a table with columns: Dist, Percent, GL Unit, Account, Fund, Dept, Program, Bud Ref, PC Bus Unit, Project, and Ac. The table has one row with '1' in the 'Dist' column and 'URIPS' in the 'GL Unit' column. At the bottom of the form are 'OK', 'Cancel', and 'Refresh' buttons.

If you are entering the Distribution on the Line(s) on the Requisition Main Page, click  and [go to Line Items on page 16](#).

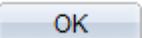
If you are entering the Distributions here and if there are multiple ChartField Strings, click  :

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.)

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Affiliate	Fund Affil	Budget Date	Location
1		URIPS													02/14/2019	4055_001_S
2	100.0000	URIPS													02/14/2019	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:** Delivery of goods or services on a Internal Vendor Requisition *MUST BE WITHIN* the current Fiscal Year.

Click  when all Distribution lines are done.

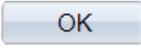
You may receive the following message:

**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.: Catering Services). The Description should include any pertinent information such as the date of the event, etc.

**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:

**Header**

\*Requester kristenbellotti      Bellotti, Kristen

\*Requisition Date 02/14/2019      Requester Info

Origin IV      Internal Vendor Requisition

\*Currency Code USD      Dollar

Accounting Date 02/14/2019

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

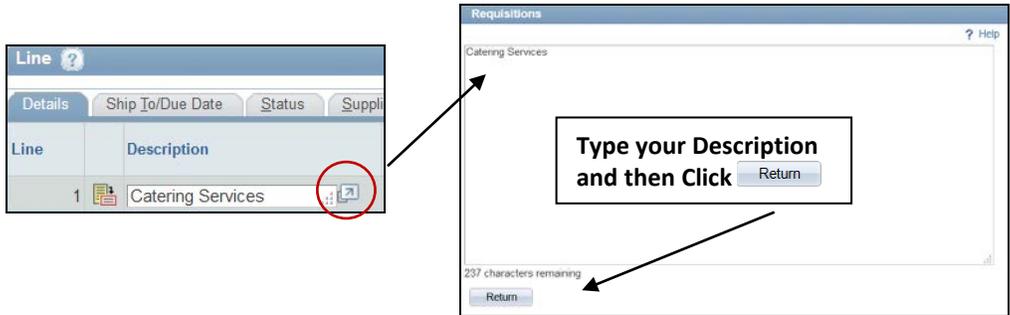
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

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

Save    Notify    Refresh    Add

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

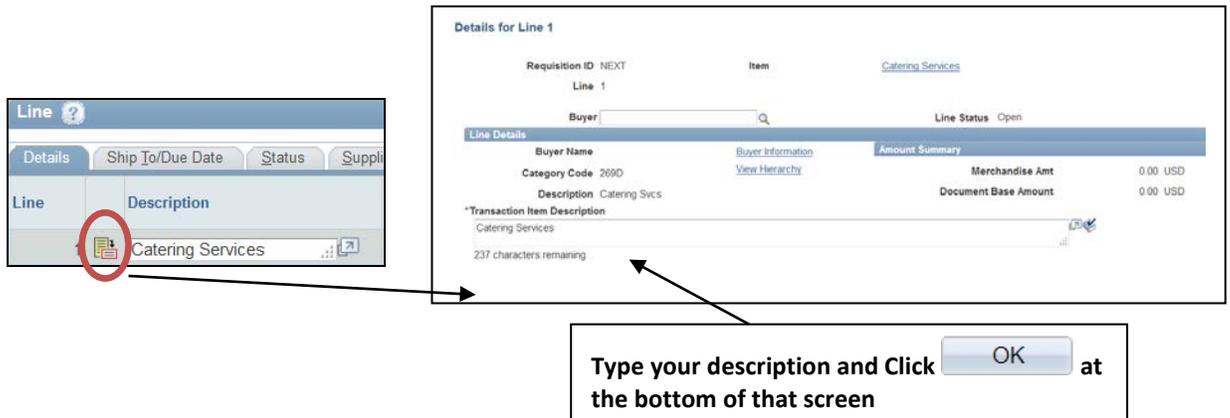
**1 – Click on the  at the end of the Description to access the entire Description area:**



**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*):**



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:

The screenshot shows the 'Requisition' header with fields for Business Unit (URIPS), Requisition ID (NEXT), and Requisition Name. It includes a 'Resubmit' button and a 'Status' of 'Open'. The 'Amount Summary' shows a 'Total Amount' of 0.00 USD. Below the header is the 'Line' table with columns: Line, Description, Quantity, \*UOM, Category, Price, Merchandise Amount, and Status. The first row is highlighted, and a red circle is drawn around the comment icon in the right-hand column of that row. The table contains three rows of data, all with a quantity of 0.0000 and a status of 'Open'.

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	0.0000		269D	0	0.00	Open
2		0.0000			0	0.00	Open
3		0.0000			0	0.00	Open

➤ **Quantity**

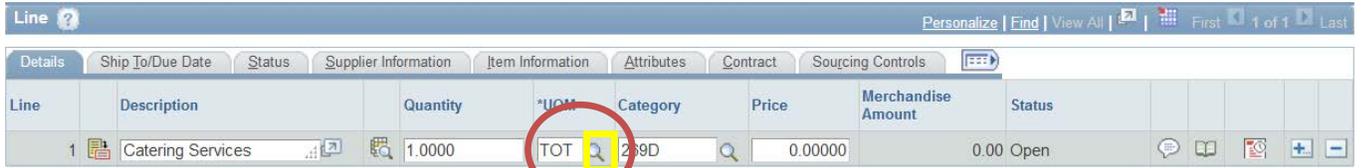
Type the Quantity of that item:

This screenshot is identical to the one above, but the 'Quantity' field in the first row of the 'Line' table is circled in red. The quantity is now '1.0000'.

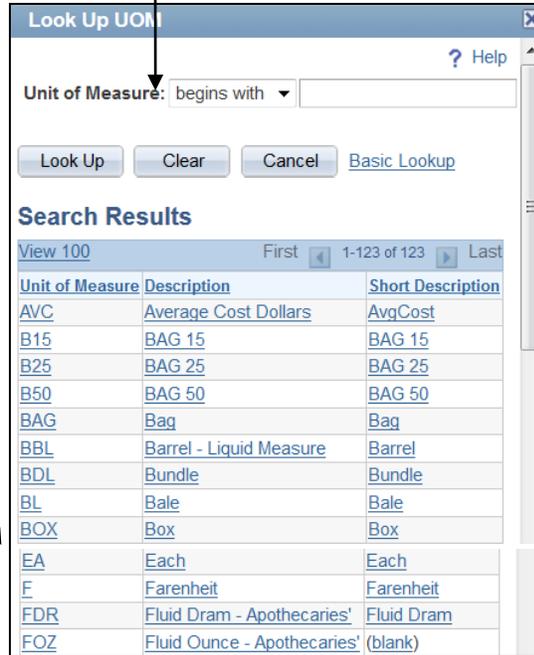
Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	1.0000		269D	0.00000	0.00	Open

➤ **Unit of Measure**

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



Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	1.0000	TOT	269D	0.00000	0.00	Open



Unit of Measure: begins with

Look Up Clear Cancel Basic Lookup

**Search Results**

View 100 First 1-123 of 123 Last

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

Select from the Search Results

➤ **Category**

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

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



Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	1.0000	TOT	269D	15,000.00000	15,000.00	Open

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

➤ **Price**



Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	1.0000	TOT	269D	15,000.00000	15,000.00	Open

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

➤ **Ship To**

Defaults from the Requisition Defaults page:

Maintain Requisitions

**Schedule**

Business Unit URIPS Requisition Date 02/14/2019  
Requisition ID NEXT Status Open  
[Return to Main Page](#)

Line	Item	Catering Services	Quantity	1.0000	Total	Merchandise Amt	15,000.00	USD
<b>Schedule</b> <a href="#">Personalize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a>   1 of 1   <a href="#">Last</a>								
<b>Details</b> <a href="#">Details</a>								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2103_0	K	1.0000	15,000.00000	15,000.00	03/31/2019	Bellotti, Kristen	Active

[Add Ship To Comments](#)

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

➤ **Ship To Control**

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

When the default Ship To Control is accepted, the Ship To address that will print on the Purchase Order will include URI, Central Receiving, Kingston, RI. 02881.

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

## ➤ Change the Ship To Address

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 02/14/2019  
 Requisition ID NEXT Status Open  
[Return to Main Page](#)

Line	Item	Catering Services	Quantity	1.0000	Total	Merchandise Amt	15,000.00	USD
Schedule								
Details								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2103_0	K	1.0000	15,000.0000C	15,000.00	03/31/2019	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 02/14/2019  
 Requisition ID NEXT Status Open

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

Comments

Use Standard Comments [Ship To](#) 2103\_001\_S [Comment Status](#) Active [Inactivate](#)

Tracey

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 Flaaa Rd., Room 098  
**Attention:** Tracey

PeopleSoft automatically adds the word "Attention".

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

Maintain Requisitions

### Schedule

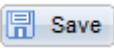
Business Unit URIPS Requisition Date 02/14/2019  
Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Catering Services	Quantity	1.0000	Total	Merchandise Amt	15,000.00	USD
Schedule								
Details								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2103_0	K	1.0000	15,000.00000	15,000.00	03/31/2019	Bellotti, Kristen	Active

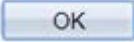
[Add Ship To Comments](#)

Save Notify Refresh Add Update/Display

- 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 26.](#)
- If the Chartfield String Distribution(s) was/were entered on the Requisition Defaults page,  and  the Requisition:

You will receive this message:

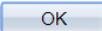
Click



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 29 to add additional Line Items](#) or if there are no more items [go to page 31 to add Comments](#) and [go to page 34 to add Attachments](#).

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval:       Resubmit      Status Open

Requisition ID 0000145744      Budget Status Not Chk'd

Requisition Name 0000145744      Return:        Hold From Further Processing

**Header**

\*Requester kristenbellotti      Bellotti, Kristen  
\*Requisition Date 02/14/2019      Requester Info  
Origin IV      Internal Vendor Requisition  
\*Currency Code USD      Dollar  
Accounting Date 02/14/2019

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

[Requisition Activities](#)

[Document Status](#)

**Amount Summary**

Total Amount 15,000.00 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	Catering Services	1.0000	TOT	269D	15,000.0000	15,000.00	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 02/14/2019  
 Requisition ID NEXT Status Open  
[Return to Main Page](#)

Line	Item	Catering Services	Quantity	1.0000	Total	Merchandise Amt	15,000.00	USD
Schedule								
Details								
Sched	*Ship To	Ship To Control	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	2103_0	K	1.0000	15,000.0000C	15,000.00	03/31/2019	Bellotti, Kristen	Active

Add Ship To Comments

Save Notify Refresh Add Update/Display

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

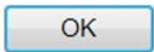
Maintain Requisitions

### Distribution

Requisition ID NEXT Item Catering Services  
 Line 1 Status Active  
 Schedule 1  
 Ship To 2103\_001\_8 Chemistry Quantity 1.0000 TOT  
 \*Distribute By Amount Open Amount 15,000.000  
 Merchandise Amt 15,000.00 USD  
 SpeedChart Multi-Screen Charts

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	15,000.00	URIPS	02/14/2019	5269											

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:

OK Cancel

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	15,000.00	URIPS	02/14/2019	5269											
2	Open	0.00		URIPS	02/14/2019	5269											

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	Source Type	Category	Affiliate	Fund Affiliate
1	Open	50.0000	7,500.00	URIPS	02/14/2019	5269	100	4055	0000								
2	Open	50.0000	7,500.00	URIPS	02/14/2019	5269	110	4061	0000								

**Note:** Budget Date defaults to the current date – IV Requisitions can only be processed for goods & services delivered within the Current Fiscal Year; therefore, the *Budget Date MUST BE within the Current 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 29.](#)

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,

Click to return to the Schedule page.

## ➤ Return to Schedule Page

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

**Maintain Requisitions**

### Schedule

Business Unit URIPS      Requisition Date 02/14/2019  
Requisition ID NEXT      Status Open

[Return to Main Page](#)

Line	Item	Quantity	Merchandise Amt
1	Catering Services	1.0000	15,000.00 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	2103_0	K	1.0000	15,000.00000	15,000.00	03/31/2019	Bellotti, Kristen	Active

[Add Ship To Comments](#)

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

This will return you to the Maintain Requisitions page:

**Maintain Requisitions**

### Requisition

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

[Copy From](#)      [Requester Info](#)

\*Requester kristenbellotti      Bellotti, Kristen  
\*Requisition Date 02/14/2019      Requester Info  
Origin IV      Internal Vendor Requisition  
\*Currency Code USD      Dollar  
Accounting Date 02/14/2019

[Requisition Defaults](#)      [Add Comments](#)      **Amount Summary** ?  
[Requisition Activities](#)      Total Amount 15,000.00 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	Catering Services	1.0000	TOT	269D	15,000.00000	15,000.00	Open

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

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

When all lines are complete, Click [Save](#)

[To add additional Line Items, see page 29.](#)

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  :

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval:       Resubmit      Status Open

Unit      Requisition ID 0000145744      Budget Status Not Chk'd

Requisition Name 0000145744      Return:        Hold From Further Processing

**Header**

\*Requester kristenbellotti      Bellotti, Kristen

\*Requisition Date 02/14/2019      [Requester Info](#)

Origin IV      Internal Vendor Requisition

\*Currency Code USD      Dollar

Accounting Date 02/14/2019

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

[Requisition Activities](#)      Total Amount 15,000.00 USD

[Document Status](#)

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

Purchasing Kit      Catalog      Search for Lines

Item Search      Requester Items      Line  To  Retrieve

**Line**

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	1.0000	TOT	269D	15,000.0000	15,000.00	Open

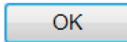
View Printable Version      \*Go to ...More...

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:

## Requisition

Business URIPS  
Unit

Requires State Approval:

Status Open

Requisition ID 0000145744

ID

Budget Status Not Chk'd

Requisition Name 0000145744

Return:

Hold From Further Processing

### Header

\*Requester  Bellotti, Kristen  
\*Requisition Date  [Requester Info](#)  
Origin  Internal Vendor Requisition  
\*Currency Code  Dollar  
Accounting Date

[Requisition Defaults](#)

[Add Comments](#)

### Amount Summary

Total Amount 15,000.00 USD

### Add Items From

Purchasing Kit Catalog  
Item Search Requester Items

### Select Lines To Display

[Search for Lines](#)

Line  To

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	1.0000	TOT	269D	15,000.0000	15,000.00	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 you are Requisitioning more than 5 line items using the same Category/Account Code you may issue a Requisition with 1 Line Item; the Description should read "See Attached" and [Attach the quote containing all Line Items \(see page 34\)](#).
- If there is an Additional Charge for Shipping, you must either add a Line or include the Cost in the Price when processing 1 line item.

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(s), Click on the hyperlink [Add Comments](#) :

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval:       Resubmit      Status Open

Unit      Requisition ID 0000145744      Budget Status Not Chk'd

Requisition Name 0000145744      Return:        Hold From Further Processing

**Header**

\*Requester kristenbellotti      Bellotti,Kristen      [Requester Info](#)

\*Requisition Date 02/14/2019      Origin IV      Internal Vendor Requisition

\*Currency Code USD      Dollar

Accounting Date 02/14/2019

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

[Requisition Activities](#)

[Document Status](#)

**Amount Summary**

Total Amount 15,000.00 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	Catering Services	1.0000	TOT	269D	15,000.0000	15,000.00	Open

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

Save      Return to Search      Notify      Refresh      Add

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

**Header Comments**

Business Unit URIPS Requisition Date 02/14/2019  
Requisition ID 0000145744 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 Comment Status Active deactivate +

Chemistry Department  
140 Flagg Road  
Attn: Name of Person  
Kingston, RI 02881

Send to Supplier  Show at Receipt  
 Show at Voucher

**Associated Document**  
Attachment Attach View Delete Email  
From -> REQ URIPS-0000145744  
OK Cancel Refresh

Check the  Send to Supplier box

To View All  
Comments, Click

[View All](#)

To add additional  
Header Comments,

Click

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

Comments

Find | View All | First | 2 of 2 | Last

[Use Standard Comments](#)

Comment Status Active Inactivate

Send to Supplier Show at Receipt Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ URIPS-0000145744

OK Cancel Refresh

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

Standard Comments

Comments

\*Action: Copy Comment

Comment Type: [ ] [Search Icon]

Comment ID: [ ] [Search Icon]

\*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

View 100 First 1-4 of 4 Last

Standard Comment Type	Description
BID	Bid Language/Bid Types
PO	Purchase Order Language
REQ	Requisition
	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 [Search Icon]

Comment ID: [ ] [Search Icon]

\*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.

Look Up Comment ID

SetID: URIPS

Standard Comment Type: REQ

Standard Comment ID: begins with [ ]

Description: begins with [ ]

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-3 of 3 Last

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

If you choose HDR, HDR 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 HDR

\*Effective Date 02/15/2019

\*Status Active

Description Second Header Description

Short Desc Second Hea

Comments ~

OK Cancel Refresh

In this example, when the Comment is brought into the Header Comment, please remember to type your Header Comment after the ~ symbol. PS is programmed to put the comment with the ~ at the top of the Req when it is printed.

Click  to return to the Header Comments.

### ➤ Adding Attachments

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

Header Comments

Business Unit URIPS

Requisition ID 0000145744

Requisition Date 02/14/2019

Status Open

Retrieve Active Comments Only

\*Sort Method Comment Time Stamp

\*Sort Sequence Ascending

Comments

Use Standard Comments

Comment Status Active

Send to Supplier  Show at Receipt

Show at Voucher

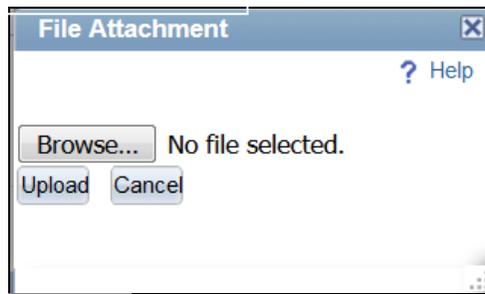
Associated Document

Attachment     Email

From -> REQ URIPS-0000145744

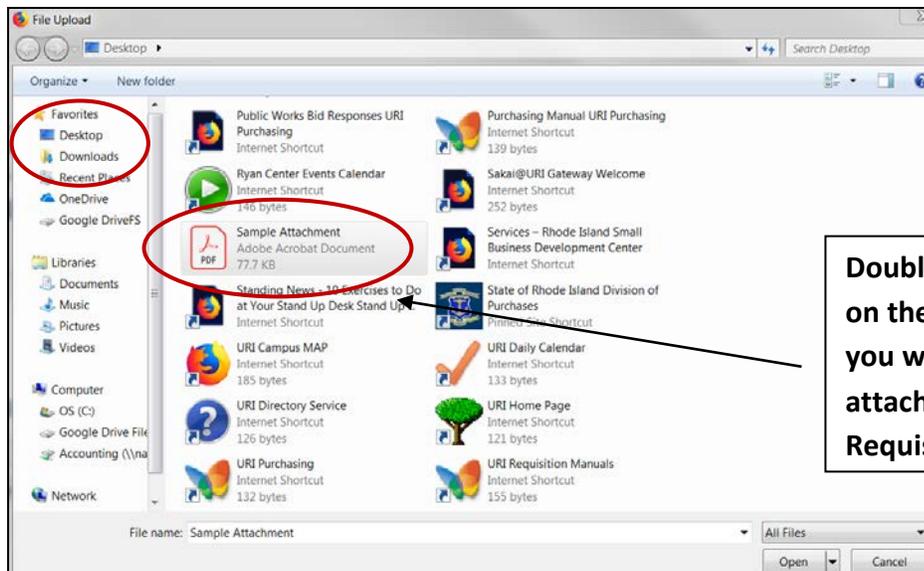
OK Cancel Refresh

This message will appear:



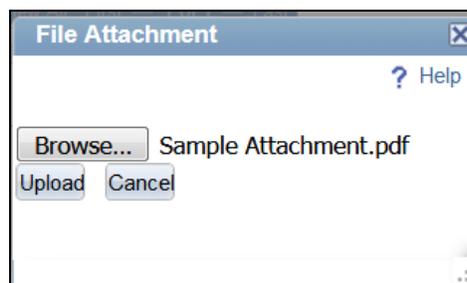
Click **Browse...**

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



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

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



Click **Upload** to attach the file

The Attachment will be listed on the Comment. If you would like the Attachment to be included with the resulting Purchase Order, check the  Email box.

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

**Header Comments**

Business Unit URIPS      Requisition Date 02/14/2019  
Requisition ID 0000145744      Status Open

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

**Comments**      Find | View All | First | 2 of 3 | Last

Use Standard Comments      Comment Status Active      Inactivate

See attached Catering Quote

Send to Supplier       Show at Receipt  
 Show at Voucher

**Associated Document**

Attachment Sample_Attachment.pdf	Attach	View	Delete	<input type="checkbox"/> Email
----------------------------------	--------	------	--------	--------------------------------

From -> REQ URIPS-0000145744

OK    Cancel    Refresh

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

**Comments**      Find | 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 02/14/2019  
Requisition ID 0000145744      Status Open

---

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

**Comments**      Find | View 1      First 1-3 of 3      Last

[Use Standard Comments](#)      Comment Status Active       

Chemistry Department  
140 Flagg Road  
Attn: Name of Person  
Kingston, RI 02881

Send to Supplier       Show at Receipt  
 Show at Voucher

**Associated Document**

Attachment	Attach	View	Delete	Email
From -> REQ URIPS-0000145744				

---

[Use Standard Comments](#)      Comment Status Active       

See attached Catering Quote

Send to Supplier       Show at Receipt  
 Show at Voucher

**Associated Document**

Attachment	Attach	View	Delete	Email
Sample_Attachment.pdf				
From -> REQ URIPS-0000145744				

---

[Use Standard Comments](#)      Comment Status Active       

~This is the Header Comment - Chemistry Conference 3/31/2019

Send to Supplier       Show at Receipt  
 Show at Voucher

**Associated Document**

Attachment	Attach	View	Delete	Email
From -> REQ URIPS-0000145744				

Click  when done.

This will bring you back to the main Requisition screen:

**Requisition**

Business URIPS      Requires State Approval:       Resubmit      Status Open  
Unit      Requisition 0000145744      ID      Budget Status Not Chk'd  
Requisition Name 0000145744      Return:        Hold From Further Processing

**Header**

\*Requester kristenbellotti      Bellotti,Kristen  
\*Requisition Date 02/14/2019      Requester Info  
Origin IV      Internal Vendor Requisition  
\*Currency Code USD      Dollar  
Accounting Date 02/14/2019

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

[Requisition Activities](#)      [Document Status](#)      Total Amount 15,000.00 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	Catering Services	1.0000	TOT	269D	15,000.0000	15,000.00	Open

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

**Save**      Return to Search      Notify      Refresh      Add

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

**This message will appear:**

**Message**

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

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

**OK**

Click **OK**

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

## ➤ Print the Requisition

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

**Requisition**

Business Unit: URIPS  
Requisition ID: 0000145744  
Requisition Name: 0000145744

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

**Header**

\*Requester: kristenbellotti | Bellotti, Kristen  
\*Requisition Date: 02/14/2019 | Requester Info  
Origin: IV | Internal Vendor Requisition  
\*Currency Code: USD | Dollar  
Accounting Date: 02/14/2019

Requisition Defaults | Edit Comments | Amount Summary  
Requisition Activities | Document Status | Total Amount: 15,000.00 USD

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

**Line**

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Watering Services	1.0000	TOT	269D	15,000.0000	15,000.00	Open

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

This message may appear:

Click

Yes

### Message

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

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

Yes

No

The following message will appear:

Click

OK

### Message

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

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

OK

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

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

Proofread this copy to make sure all information is correct.

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

Tab 1 = Add/Update Reqs

Tab 2 = Printable Version of Req



### Internal Vendor Requisition

This Form is for Internal Use Only

<p>Suggested Vendor Name: URI Dining Services                  Vendor Address: 10 Tootell Rd.                  Kingston, RI 02881                  Vendor#: URI_DIN</p> <p><b>Ship To:</b> URI Central Receiving                  Kingston, RI 02881                  Chemistry Department                  Beaupre Center, 140 Flagg Rd, Rm 180                  Attention: Tracey</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><b>Business Unit:</b></td> <td>URIPS</td> <td>OPEN</td> </tr> <tr> <td>Date</td> <td>Page</td> <td>Req ID:</td> </tr> <tr> <td>02/14/2019</td> <td>1</td> <td>0000145744</td> </tr> <tr> <td>Requester</td> <td colspan="2">E-mail for Receiving Report</td> </tr> <tr> <td>Bellotti, Kristen</td> <td colspan="2">kristenbellotti@discard.uri.edu</td> </tr> <tr> <td>Requester Dept</td> <td>Phone #</td> <td>Fax #</td> </tr> <tr> <td>Research Purchasing</td> <td>401/874-2320</td> <td>401/874-2306</td> </tr> </table>	<b>Business Unit:</b>	URIPS	OPEN	Date	Page	Req ID:	02/14/2019	1	0000145744	Requester	E-mail for Receiving Report		Bellotti, Kristen	kristenbellotti@discard.uri.edu		Requester Dept	Phone #	Fax #	Research Purchasing	401/874-2320	401/874-2306
<b>Business Unit:</b>	URIPS	OPEN																				
Date	Page	Req ID:																				
02/14/2019	1	0000145744																				
Requester	E-mail for Receiving Report																					
Bellotti, Kristen	kristenbellotti@discard.uri.edu																					
Requester Dept	Phone #	Fax #																				
Research Purchasing	401/874-2320	401/874-2306																				

Attachments: Y

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
This is the Header Comment - Chemistry Conference 3/31/2019						
1-1	Catering Services	1.0000	TOT	15,000.0000	15,000.00	03/31/2019
Catering Details: Catering needed for a conference in Room 123 of the Chemistry Building. Type all details about this line here.						
Chemistry Department 140 Flagg Road Attn: Name of Person Kingston, RI 02881						
See attached Catering Quote						
<b>Total Requisition Amount:</b>					<u>15,000.00</u>	

Period	Line-Sch-Dist	Accounts	Project	Activity	Amount	FAB
FY2019	1-1-1	5269-100-4055-0000			7,500.00	
FY2019	1-1-2	5269-110-4061-0000			7,500.00	

For purchasing use only

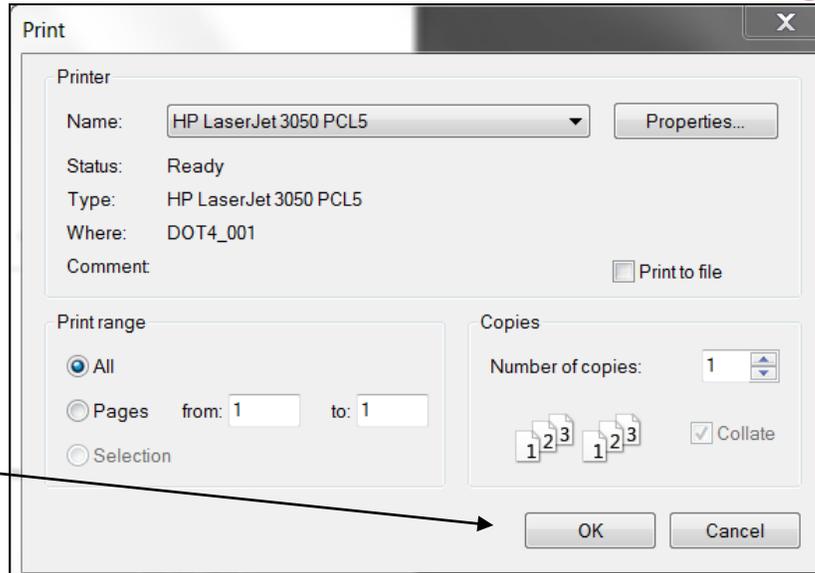
Buyer	Date	Type/Code	SR#	Clerk	Date
Buyer	Date	Type/Code	PO#	Rev.#	Clerk Date

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.

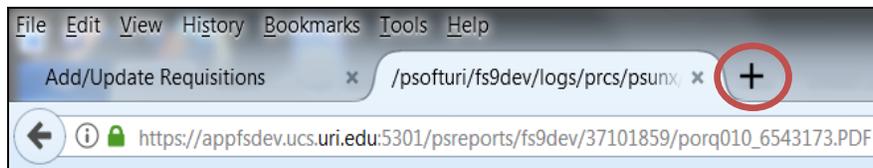


The Print box window comes up; choose where to Print your Requisition and Click

OK



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



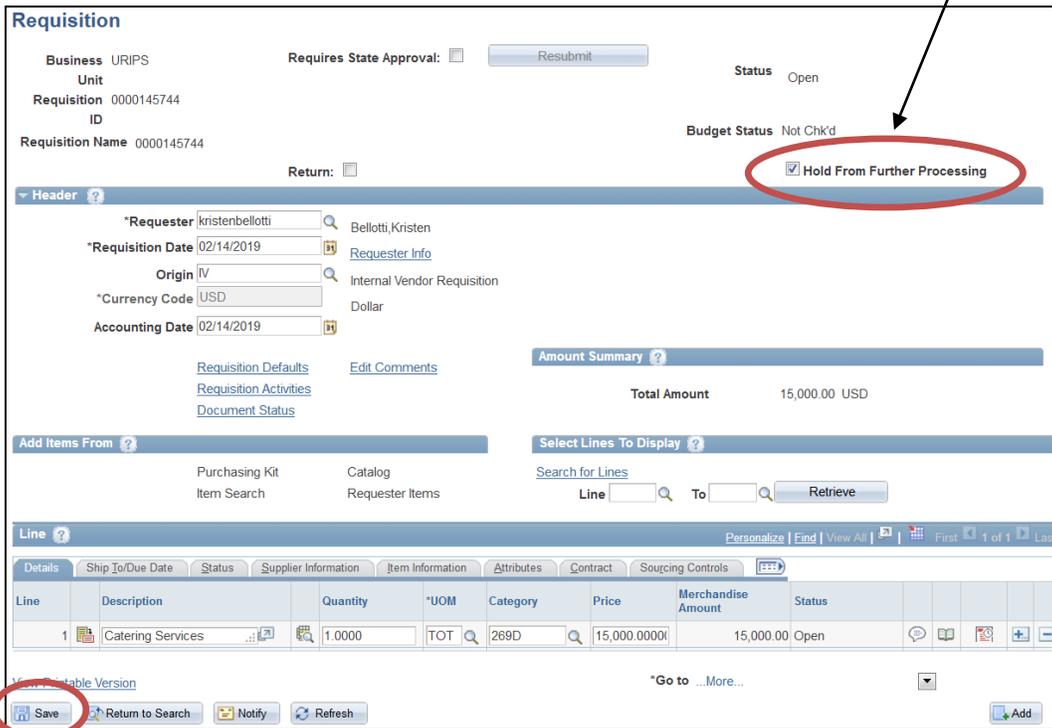
On the following pages, you will find instructions on how to proceed for both:

- [Originator \(page 42\)](#); or
- [Requester \(page 43\)](#)

## ➤ ORIGINATOR Procedures:

When the requisition is Complete and if you are an “Originator”, uncheck the  **Hold From Further Processing** box and click  **Save** :

**Hold From Further Processing**



**Requisition**

Business URIPS      Requires State Approval:       Resubmit      Status Open  
Unit      Requisition ID 0000145744      Budget Status Not Ch'kd  
Requisition Name 0000145744      Return:        **Hold From Further Processing**

**Header**

\*Requester kristenbellotti      Bellotti, Kristen  
\*Requisition Date 02/14/2019      Requisition Info  
Origin IV      Internal Vendor Requisition  
\*Currency Code USD      Dollar  
Accounting Date 02/14/2019

Requisition Defaults      Edit Comments      Amount Summary

Total Amount 15,000.00 USD

Add Items From      Select Lines To Display

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	1.0000	TOT	269D	15,000.00000	15,000.00	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:

**Requisition**

Business URIPS      Requires State Approval:       Resubmit      Status Open

Unit      Requisition 0000145744      ID      Budget Status Not Chk'd

Requisition Name 0000145744      Return:        **Hold From Further Processing**

**Header**

\*Requester kristenbellotti      Bellotti, Kristen

\*Requisition Date 02/14/2019      Requisition Info

Origin IV      Internal Vendor Requisition

\*Currency Code USD      Dollar

Accounting Date 02/14/2019

Requisition Defaults      Edit Comments      Amount Summary

Requisition Activities      Total Amount 15,000.00 USD

Document Status

**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	Catering Services	1.0000	TOT	269D	15,000.0000	15,000.00	Open

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

Save      Return to Search      Notify      Refresh      Add

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

**Maintain Requisitions**

**Requisition**

Business URIPS      Requires State Approval:       Resubmit      Status Open

Unit      Requisition 0000145744      ID      Budget Status Not Chk'd

Requisition Name 0000145744      Return:        **Hold From Further Processing**

Then Click  at the bottom of the screen.

The Requisition has now entered the Workflow Approval Process.

*Once this happens the Requisition cannot be retrieved.*

## ➤ Workflow Approval Process

**Level 1 - Signatory for Signature Authorization**

**Level 2 - Final Review from Signature Authorization**

**Level 3 - Administrative Approvals; i.e.:**

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

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

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

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

```
This e-mail is to notify you that Internal Vendor Requisition: 0000019908,
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.**

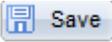
**If the Requisition is Denied, the Requester will receive an e-mail informing them that the Requisition has been Denied. If the Approver indicated a reason it will appear as a Comment:**

```
This e-mail is to notify you that Internal Vendor Requisition: 0000019908 entered
on 02/03/2012 has been denied by OPRID: bettyg

Comments: We do not have any funds remaining for this fiscal year.
```

**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 49.](#)**

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 Internal Vendor Requisition: 0000019908 entered on 02/03/2012 has been approved.

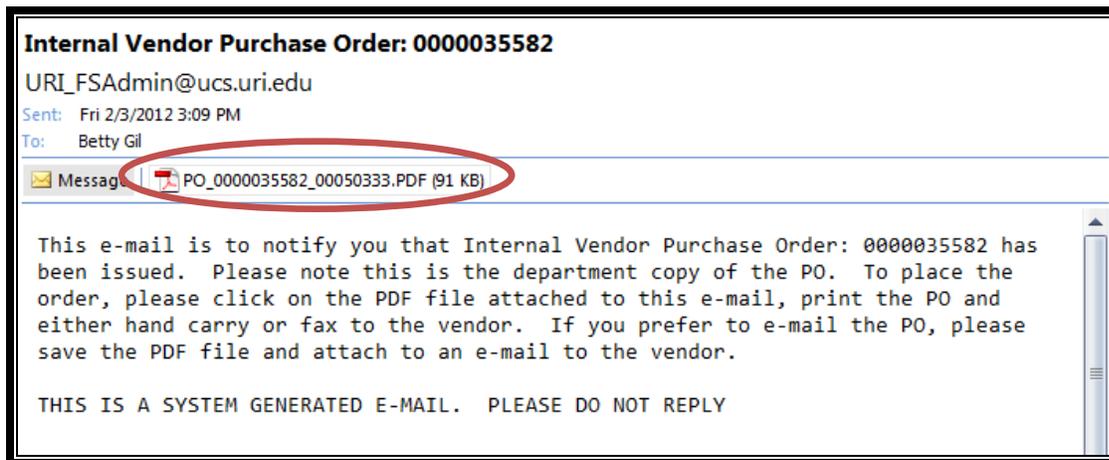
Once the Internal Vendor Requisition has been Approved by all levels, the Budget Checking Process will automatically be initiated. If the Requisition passes Budget Check, an Internal Vendor Purchase Order will auto-create through the Sourcing Process and the Requester will receive an email:

This e-mail is to notify you that Internal Vendor Requisition: 0000019908 has been sourced to Purchase Order: 0000035582.

Once the Sourcing Process has completed, the Requester will receive a final e-mail containing the Purchase Order along with the Purchase Order Attachments, if any.

Each attachment will be a separate PDF file. For example, the PO is one .pdf and the attachment(s) are a separate .pdf.

The URI Property Department will also receive a copy of Internal Vendor Purchase Orders using account 5323, 5333, 5382, 5434, 5442, 9654, 9660, 9669 and 8797 at the same time.



The Purchase Order attached to this e-mail is the *Department Receiving Report Copy* of the PO.



**THE REQUESTER IS RESPONSIBLE FOR FORWARDING A COPY OF THE INTERNAL VENDOR PURCHASE ORDER AND ANY ATTACHMENT(S) TO THE SUPPLIER.**

Therefore, you will need to print the PO and Attachments, if any, and Fax to the Supplier or make a copy to mail or hand carry to the Supplier. If you prefer to e-mail the PO, you can save the PDF file(s) and attach to an e-mail to the Supplier.

- *Under no circumstances can changes be made to the hard copy of the Purchase Order.*

## ➤ Sample Purchase Order

This is a sample of a Internal Vendor 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.

**Internal Vendor Purchase Order**

THE UNIVERSITY OF RHODE ISLAND

Page 1 of 1  
**P.O.# 000035582**

Date Ordered	Revision	Buyer	Freight Terms	Ship Via
02/09/2012		betva	FOB DESTINATION	
Requester	Phone	Requester Email	Due Date	
betva	401/874-2310	betva@cs.uri.edu	02/14/2012	

Vendor: URI\_DIN  
URI Dining Services  
Dining Distribution Center  
531 Plains Road  
Kingston RI 02881

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

Ship To: University of Rhode Island  
Chemistry Department  
Pastore Hall, Room 210, 51 Lower College  
Kingston RI 02881

Attention: Emma Harold

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
1-1	Catering Services for student orientation	1.00	TOT	750.35	750.35	02/14/2012
2-1	Coffee Service for morning break	1.00	TOT	55.00	55.00	02/14/2012
3-1	Snack for afternoon break	1.00	TOT	75.00	75.00	02/14/2012

Catering Event to start at 9:00

Amount 880.35

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/>

Period	Accounts	Projects	Activity	Category	Requestion ID	Posting
FE2012	5269-100-4000-0000			269D	0000019908	URI
FE2012	5269-110-4001-0000			269D	375-18	

CERTIFICATE  
I HEREBY CERTIFY THAT THE ITEMS LISTED ABOVE HAVE BEEN  
INCLUDED IN GOOD CONDITION AND ARE ACCEPTED BY ME. THIS IS A  
JUST AND PROPER CHARGE AGAINST THE ACCOUNTS LISTED AND HAS NOT  
BEEN INCURRED BY ME. I HEREBY AUTHORIZE TO SIGN THIS CERTIFICATE.

X \_\_\_\_\_ Date \_\_\_\_\_  
URI Authorized Individual

**Assistant Vice President  
Business Services**  
*J. Vernon Wyman*  
J. Vernon Wyman

The signature on all Internal Vendor Purchase Orders is the Assistant Vice President for Business Services.

- This signature is system generated and confirms a valid commitment of the University to the Supplier, but does not confirm or validate the adherence of the authorized signatory on the ChartField String(s) to the Policies and Procedures as outlined in the URI Purchasing Manual.

## ➤ Returned Requisition

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

This e-mail is to notify you that Internal Vendor Requisition: 0000019908 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):

The screenshot shows the 'Requisitions' search interface. The 'Find an Existing Value' tab is selected and circled in red. The 'Requisition ID' field is also circled in red, with a callout box pointing to it that says 'Enter the Requisition Number in the Requisition ID field'. The 'Search' button at the bottom is also circled in red, with a callout box pointing to it that says 'Click Search'. Other fields include Business Unit (LIBIPS), Requisition Status, Requisition Date, Origin, Requester, Requester Name, State Req Reference, and State Requisition Date. There are also checkboxes for 'Hold From Further Processing', 'State Req Flag', and 'Case Sensitive'.

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 :

The screenshot shows the 'Maintain Requisitions' interface. At the top right, the 'Status' is 'Approved' and the 'Budget Status' is 'Error', which is circled in red. Below this, the 'Budget Status' is also listed as 'Not Chk'd'. The 'Header' section includes fields for Requester (Kristen Bellotti), Requisition Date (12/31/2018), Origin (CR), Currency Code (USD), and Accounting Date (12/31/2018). The 'Amount Summary' shows a Total Amount of 3,500.00 USD. The 'Line' section shows a single line item for 'Convection Steamer' with a quantity of 1,0000 and a price of 3,500.00000. The status of the line is 'Pending'.

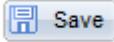
In this particular example, the Budget Error Exception is the result of "Exceeds Budget Tolerance"

The screenshot shows the 'Requisition Exceptions' page. The 'Business Unit' is URIPS and the 'Requisition ID' is 0000019883. The '\*Exception Type' is 'Error'. The 'Maximum Rows' is 100. The 'Budgets with Exceptions' table shows one exception: 'Exceeds Budget Tolerance', which is circled in red. The table has columns for Details, Business Unit, Ledger Group, Exception, More Detail, Override Budget, and Transfer.

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

**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.

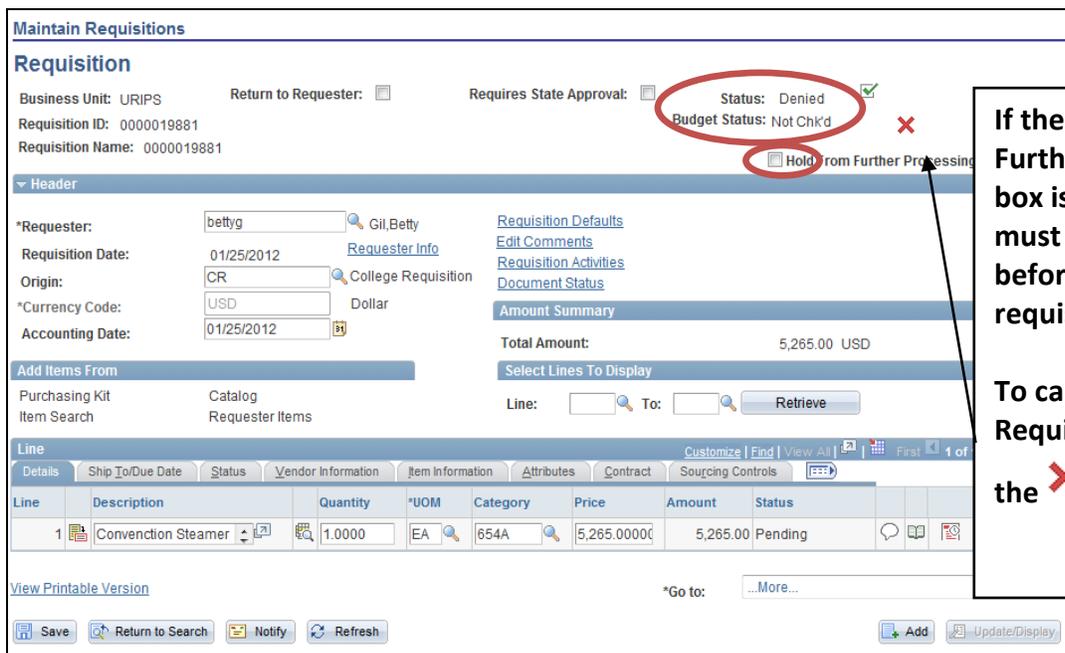
**If there are changes to the distributions, i.e.: change the ChartField String or change the Price, the Workflow Approval Process will start again once the Requisition is taken off Hold, Submitted For Approval and Saved.**

## ➤ 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**

### Example of Denied Requisition:



**Maintain Requisitions**

**Requisition**

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

**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    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: ...More...

**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:**

The screenshot shows a message box with a blue header labeled "Message". The text inside reads: "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.", and "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." Below the text are two buttons: "Yes" and "No". An arrow points from the "Yes" button in the first set to the "Yes" button in the second set, which is circled in red.

**Once the IV Req is sourced to an IVPO, please remember these notes:**

- Because Internal Vendor **Purchase Orders** (IVPO) are a one-time delivery, one-time payment situation, changes cannot be made to these types of PO's.
- However, if for some reason the entire IVPO needs to be canceled, please send an e-mail to [URIPurchasing@uri.edu](mailto:URIPurchasing@uri.edu) referencing the IVPO number, the Internal Vendor Name and the reason for cancellation; i.e. Item(s) no longer available. Purchasing will cancel the IVPO in full which will liquidate the funds. It is the Department's responsibility to confirm the cancellation with the Internal Vendor *prior to requesting* Purchasing cancel/liquidate the encumbrance.
- If the IVPO is for multiple items and not all items will be received, you will need to indicate on the Receiving Report copy of the PO which item(s) will not be received and are being cancelled. The URI Accounts Payable Office will finalize the IVPO when payment is made and will liquidate any unused portion.

➤ **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 02/14/2019  
Requisition ID 0000145744      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 URI\_DIN      URI Dining Services      Supplier Location MAIN  
Category 269D      [Supplier Lookup](#)

**Schedule**

Ship To  Chemistry Dept      \*Distribute By Amount  
Due Date 03/31/2019      Ship Via BEST WAY  
Ultimate Use Code       Freight Terms FOB DEST

Original Ship To code

One Time Address

**Distribution**

SpeedChart

**Distributions**

Details    Asset Information   

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project	A
1	100.0000	URIPS								

Type in the New Ship To code:

Ship To:  Central Receiving

Then Click  .

For example, if you change the Ship To from Purchasing 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** 02/14/2019

**Requisition ID** 0000145744

**Status** Open

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

For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.

Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.

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

[Mark All](#)     [Unmark All](#)

Retrofit Field Selection					Personalize   Find   View All   First 1-2 of 2 Last
Apply	Distrib Line	Field Name	Field Value	Apply to All 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** 02/14/2019

**Requisition ID** 0000145744

**Status** Open

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

For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.

Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.

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

[Mark All](#)     [Unmark All](#)

Retrofit Field Selection					Personalize   Find   View All   First 1-2 of 2 Last
Apply	Distrib Line	Field Name	Field Value	Apply to All 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** URIPS      **Requires State Approval:**             **Status** Open

**Unit**      **Requisition ID** 0000145744      **Budget Status** Not Chk'd

**Requisition Name** 0000145744      **Return:**        Hold From Further Processing

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**Header** ?

**\*Requester** kristenbellotti  Bellotti, Kristen  
**\*Requisition Date** 02/14/2019  [Requester Info](#)  
**Origin** IV  Internal Vendor Requisition  
**\*Currency Code** USD      Dollar  
**Accounting Date** 02/14/2019 

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

[Requisition Activities](#)      **Total Amount** 15,000.00 USD  
[Document Status](#)

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

Purchasing Kit      Catalog  
 Item Search      Requester Items

[Search for Lines](#)  
 Line   To  

---

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Catering Services	1.0000	TOT	269D	15,000.0000	15,000.00	Open

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