

Instructions for completing the online Purchase Requisition form

PLEASE COMPLETE THE FORM ON YOUR COMPUTER; IT WILL BE MUCH EASIER TO READ! The form can then be printed for signing by the person responsible for the funding source and forwarding to the Purchasing Department.

REMINDER: DO NOT SEND THE REQUISITION TO ANY VENDOR FOR ANY REASON. THIS IS NOT A PURCHASE ORDER!

- Requisition Number: This section is blank. Each department has been assigned a two digit number (see Department Requisition Numbers) that must be entered in the first Requisition field, you should use your own numbering system for the final 4 digits that go in the 2nd field so that you can track your requisitions. If you leave the Requisition number field blank, Purchasing will assign a number, however, you will not be able to track the status.
- Approved by (Budget Authority) and Date: The person who has signing authority for the funds noted on the requisition will sign and date the form here once it is completed and printed. Purchase requisitions **must** be approved by the appropriate budget authority or signing authority before Purchasing can act on the request.
- Total dollar value: This is a calculated field.
- Date of Request: Enter the date that the requisition is completed.
- Department Charged: Enter the name of the department requesting the goods or service.
- Requested by: Enter the name of the person completing the form.
- Telephone #: Enter the telephone extension number for the person completing the form.
- Date Required: Enter the date that the goods or services are to be delivered to the end user, do not use ASAP. Please remember to allow for standard processing time within the Purchasing Department and for order filling and shipping time from the vendor. If there is a critical need, please note clearly on the form in the item description field.
- First Description Line: Enter here any special notes regarding issues like special delivery instructions, quote numbers, etc.
- Item Number: This reflects the number of line items listed on the requisition form. The on-line form only has room for 12 line items per form. Please use additional copies or attached sheets for more than 12 items.
- Quantity: Amount of each item requested.
- Unit: Describe how the items are packaged and/or will be sent (i.e. each, box, carton, lot)
- Description: Provide complete information on the product or service being requested. (please remember that the people who work in the Purchasing Department are not experts

in every field on campus, a description in lay terms will be very helpful for coding and fixed asset identification) If possible, include a manufacturer name and model number. Note that you can only enter characters to the end of the line. Proceed to the next description line to complete the item description. If a vendor quote, product brochure, catalog page, or anything else that describes the item is available, please note “see attached” and staple a copy of references information to the req.

- Unit Price: Cost per each, box, carton, etc and cost for all items on that line.
- Extension: this is a calculation field.
- Vendor Section: Please complete as much as possible. If certain information is not known or available, Purchasing can fill in the blanks once we get the requisition. Do not combine commodities that are to be purchased from different vendors. Separate purchase requisitions should be prepared for each individual vendor. Similar items from the same source can and should be grouped together on the same requisition.
- Account Distribution: Use this box to identify the Banner Index or if more than one Index is being charged for the purchase. The indexes can be split by percent or by amount. If you do not know the Account, leave it blank and Purchasing will complete.

Once the form is completed, please print it, obtain the Budget Authority signature and forward it along with any attachments to the Purchasing Department. We will verify that the form is complete, that the information regarding the requested purchase is current and accurate and make adjustments and fill in the blanks as necessary. Note that if we identify any significant increase in total cost due to things like outdated vendor quotes, omitted shipping charges, mathematical errors in calculating the extension costs or req totals, we will seek authorization from the department before proceeding with processing a purchase order.

As always, if there are any questions, please call Purchasing at x55148.

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