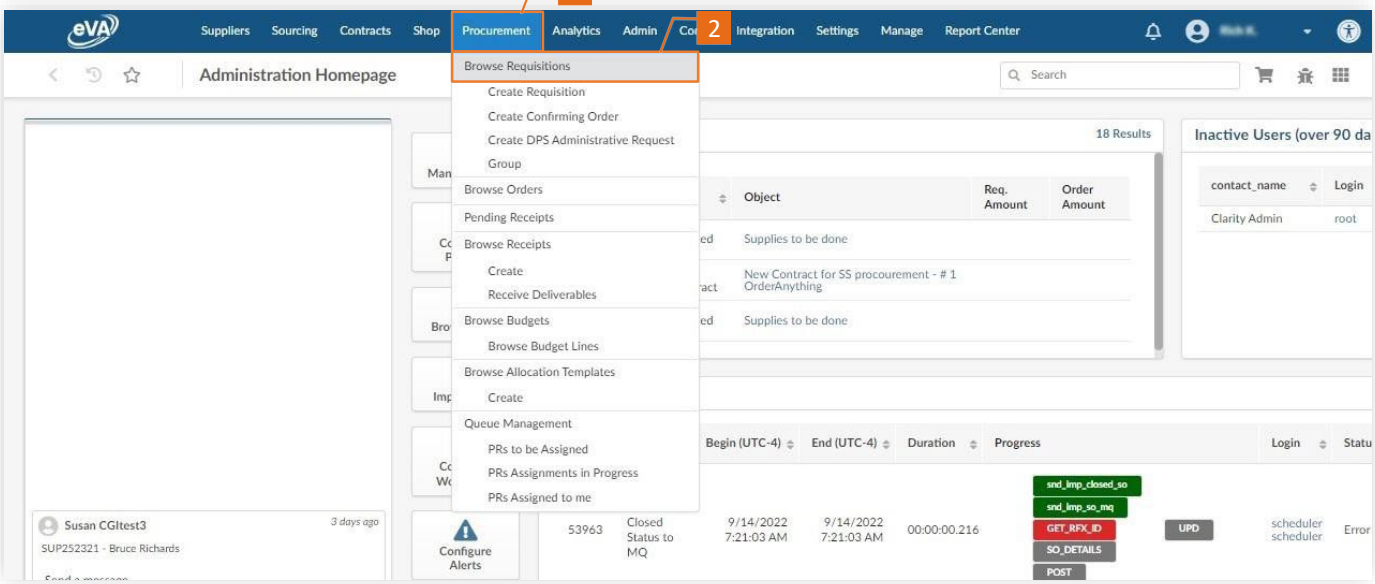
Creating a Non-Catalog Requisition

This Quick Reference Guide contains the steps needed to create a non-catalog requisition, including adding items, comments, and attachments.

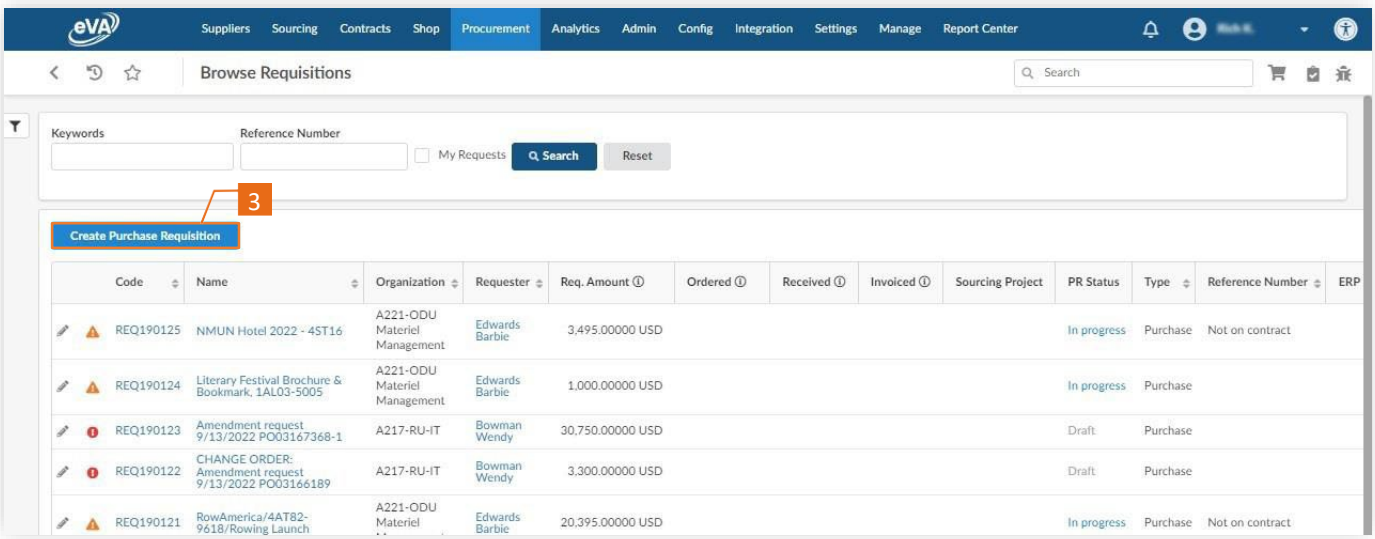
A. Create a Requisition
B. Populate Details
C. Add Line Items to the Requisition
D. Edit Requisition Item
E. Add Comments/Attachments to a Requisition
F. Submit a Requisition

A. Create a Requisition

1. Select the **Procurement** tab.
2. Select the **Browse Requisitions** option from the drop-down menu.



3. Select the requisition from the list or click **Create Purchase Requisition**.

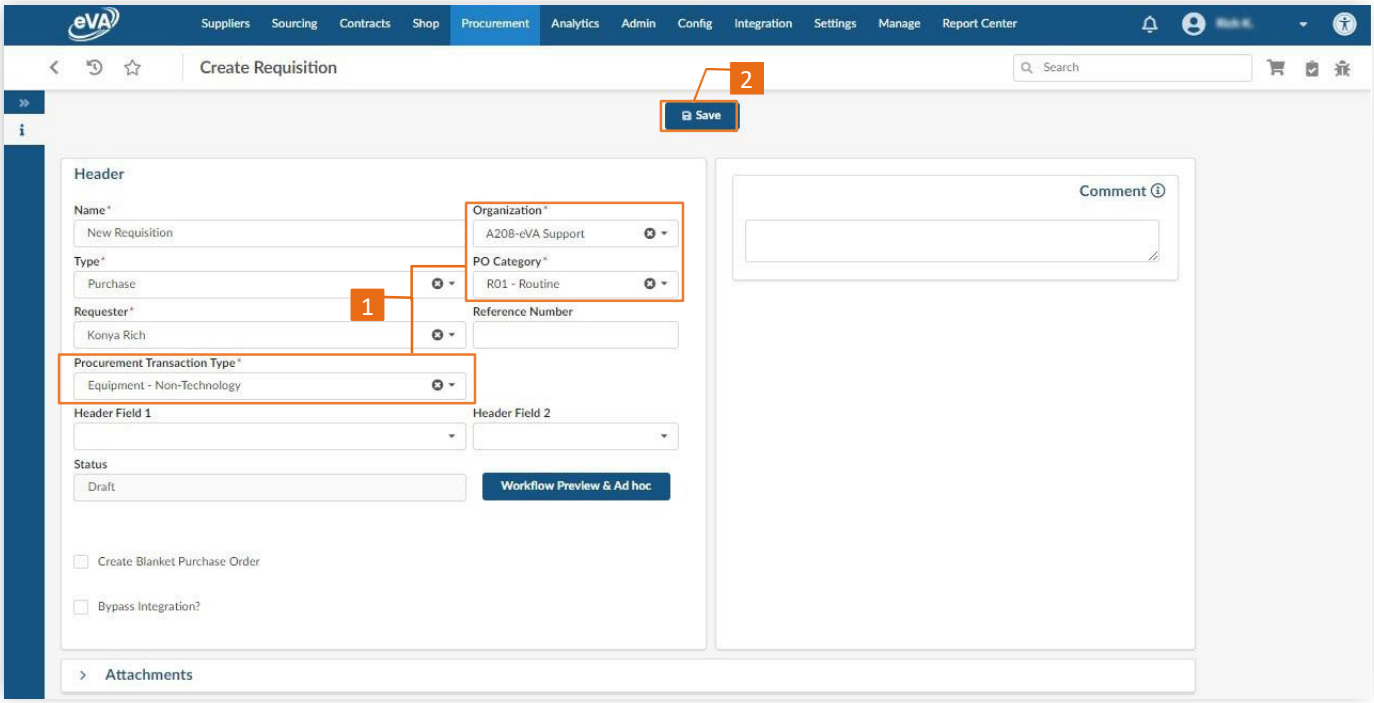


B. Populate Details

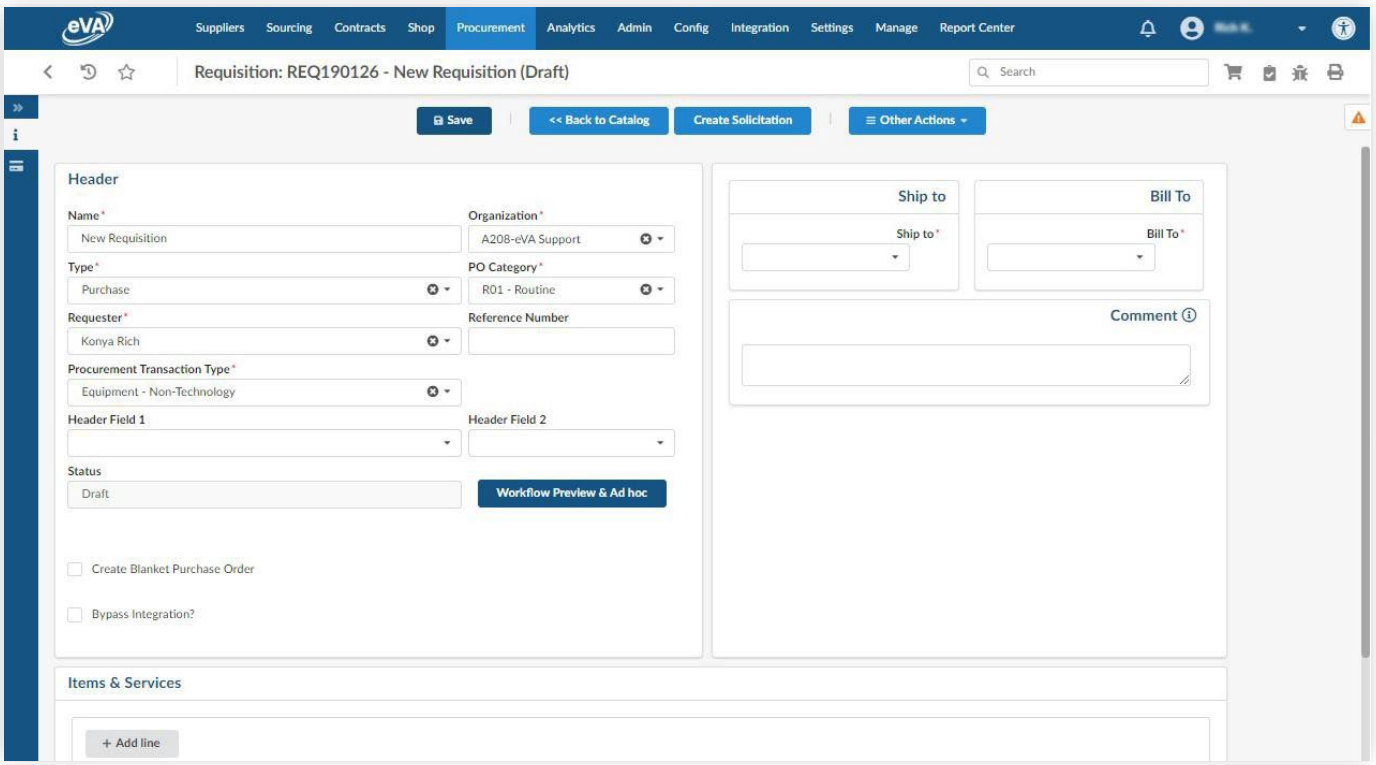
1. Fill in the required fields (denoted by a red asterisk), such as **Organization**, **PO Category**, and **Procurement Transaction Type**.

Note: Some details will be pre-populated.

2. Click **Save**.

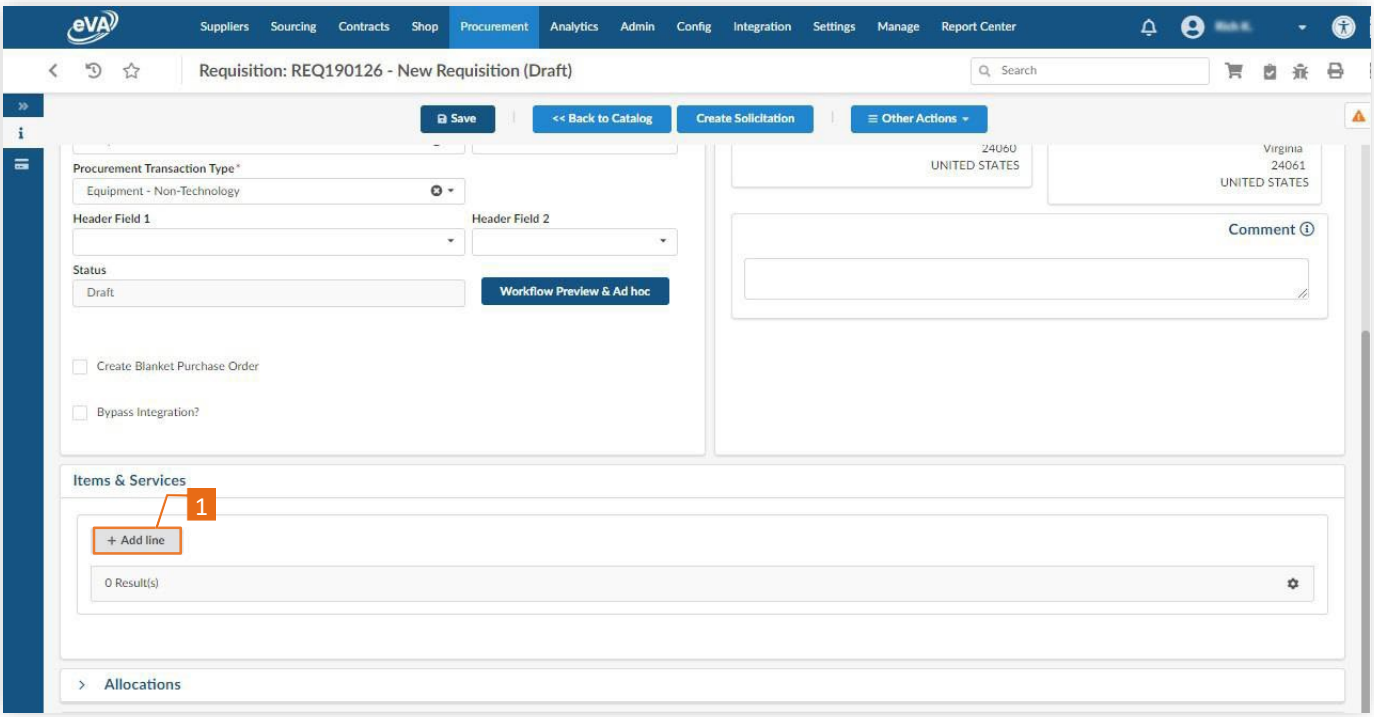


After clicking **Save**, other sections of the requisition will become active.

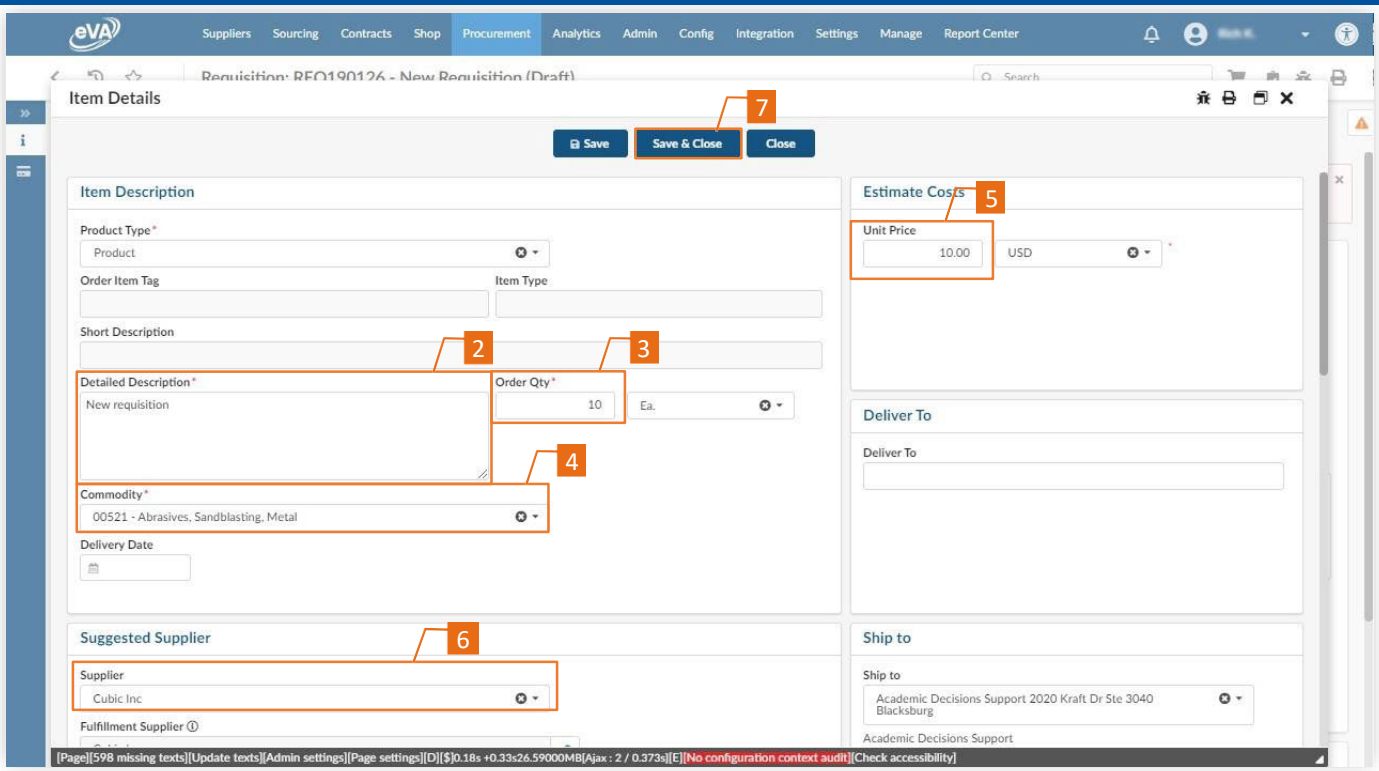


C. Adding Items to the Requisition

1. Click **+ Add line** in the **Items & Services** section.

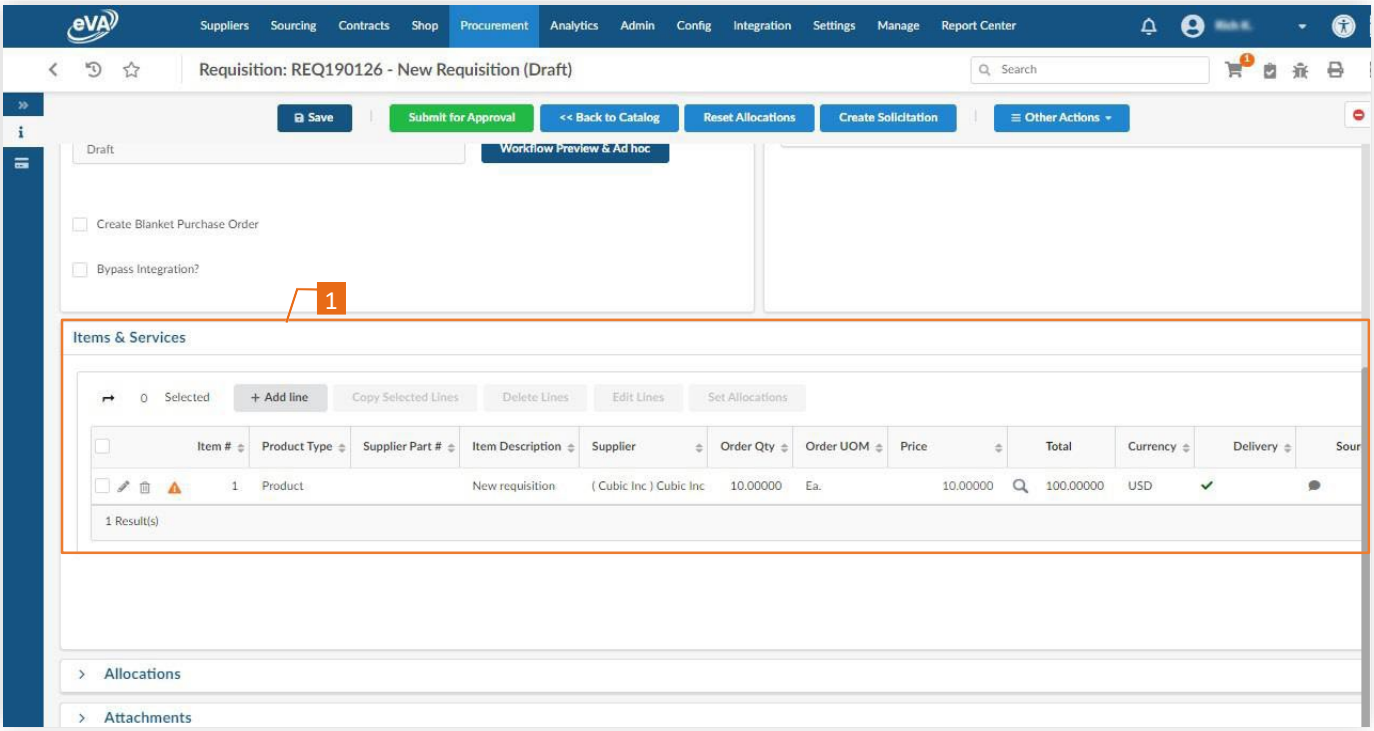


2. Enter the **Detailed Description**.
3. Enter the quantity in the **Order Qty**. field.
4. Select the **Commodity** from the drop-down list.
5. Enter the **Unit Price**.
6. Select the **Supplier** from the drop-down list.
7. Click **Save & Close**.

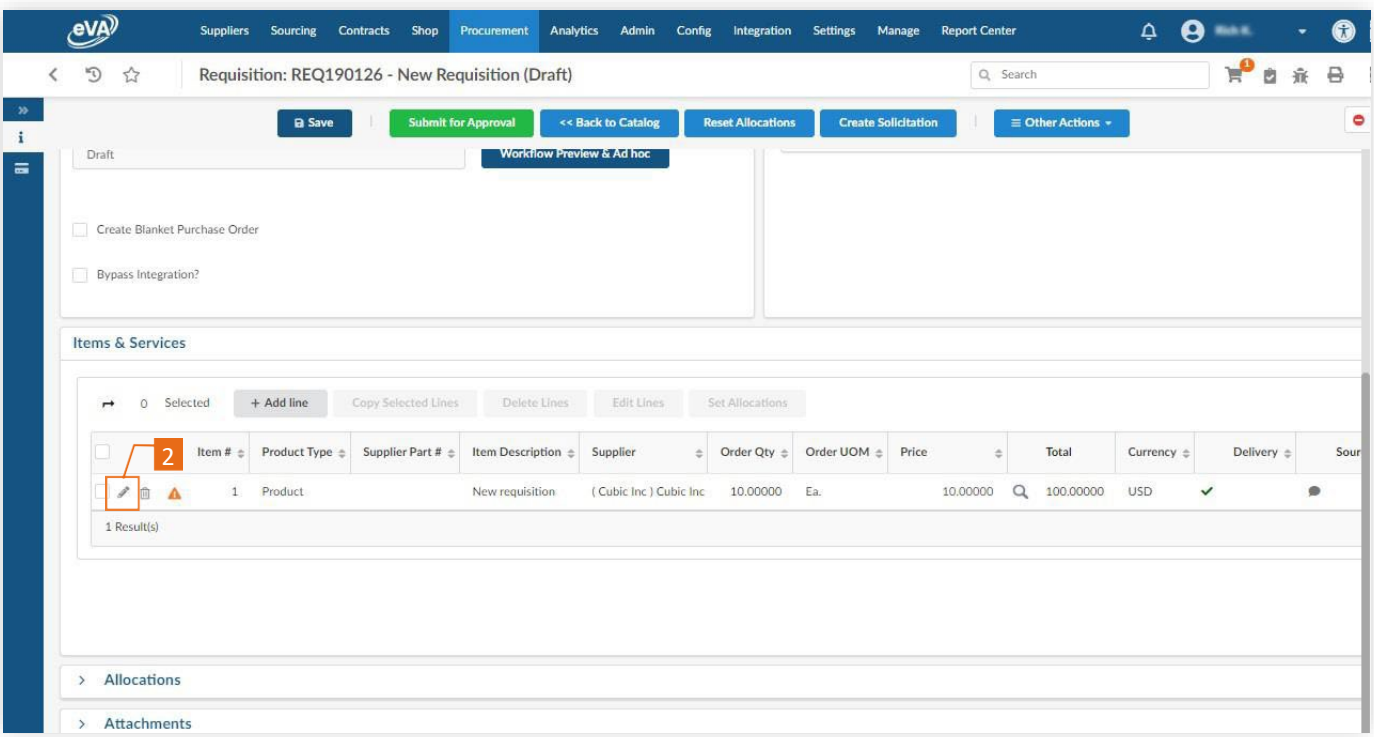


D. Edit Requisition Item

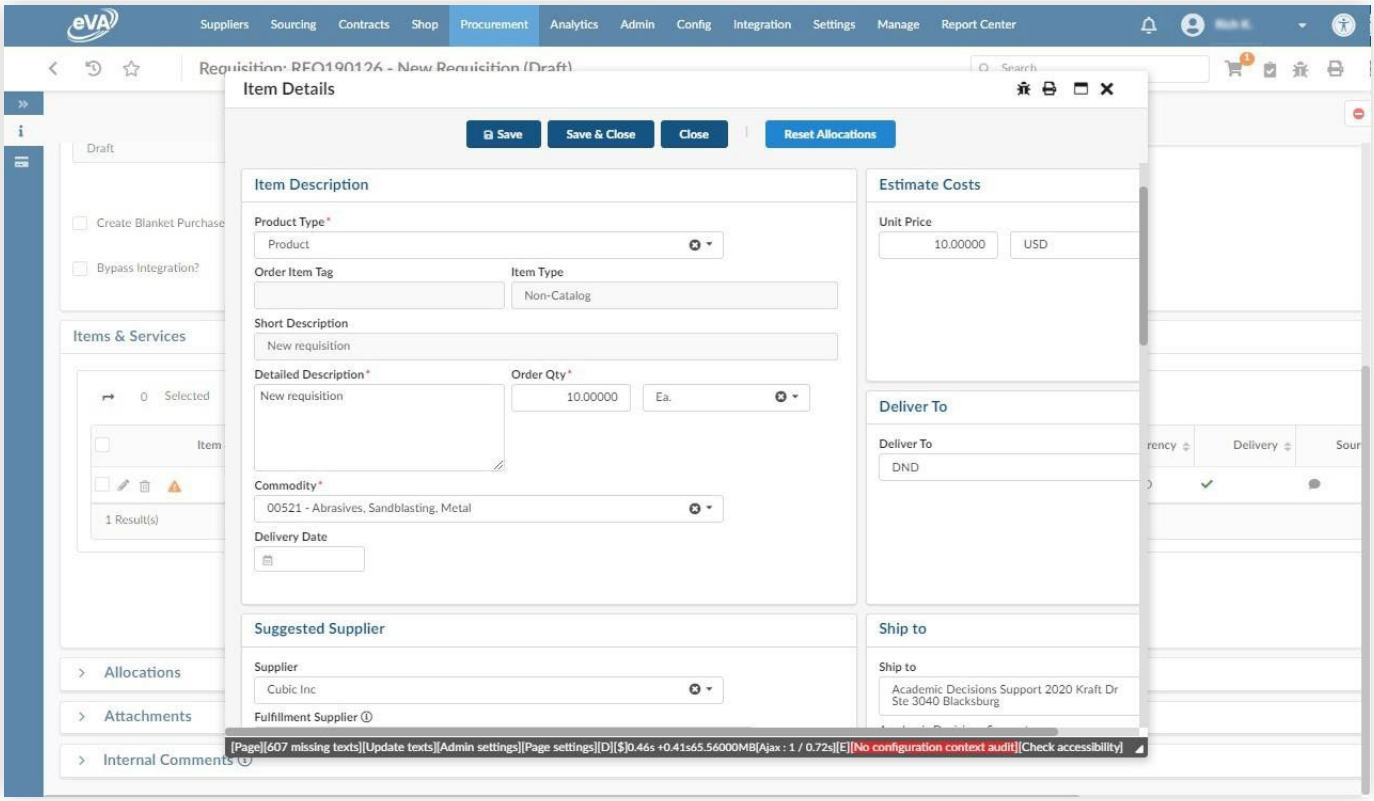
1. Go to the **Items & Services** section on the requisition page.



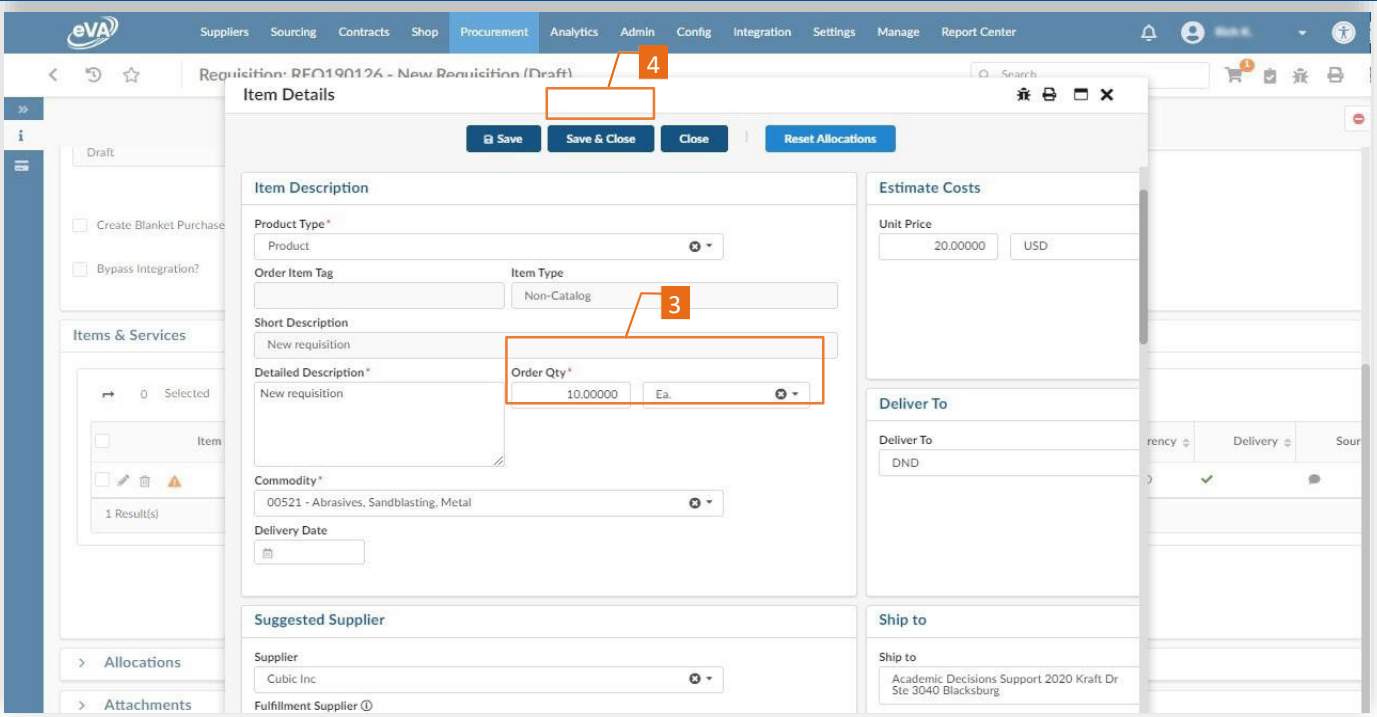
2. Select the **pencil** icon for the item that needs to be edited.



The **Item Details** pop-up window will appear with details of the item.

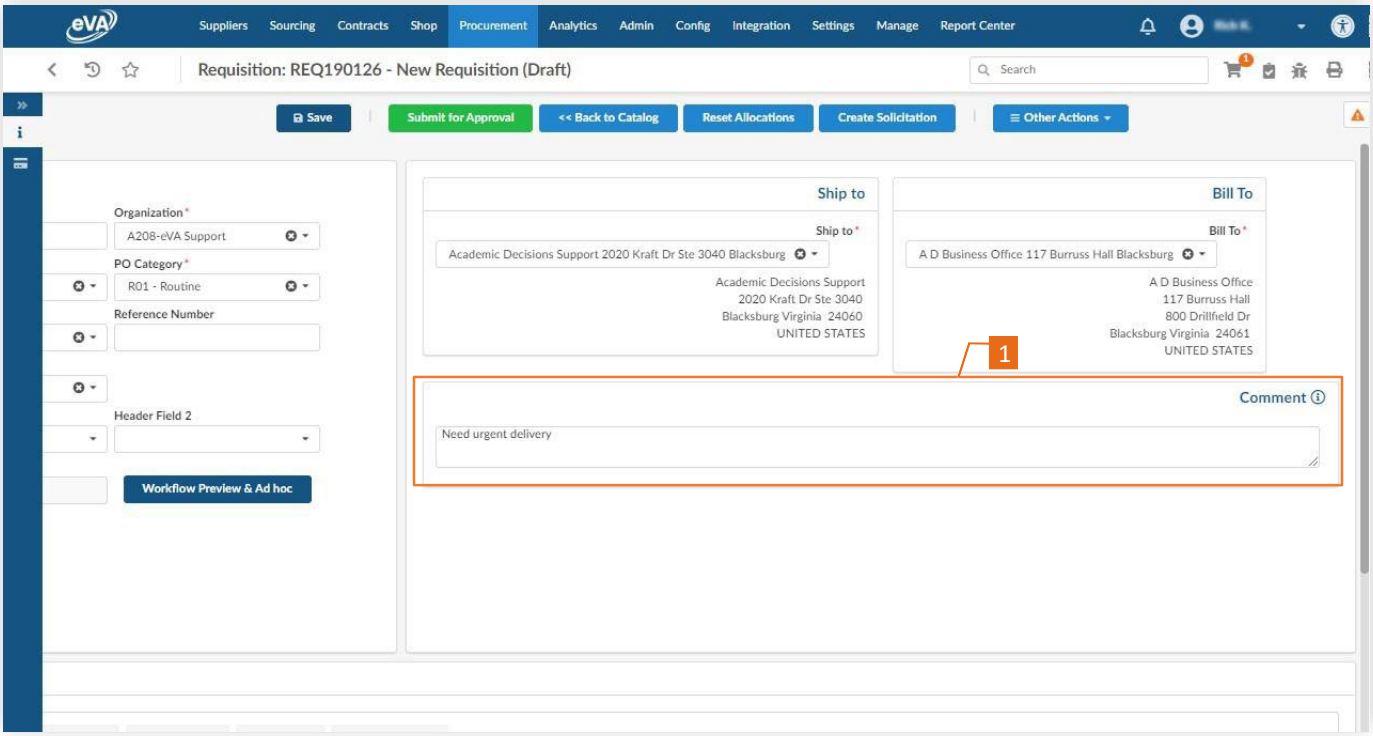


3. Make the necessary edits. Common edits include changes to **Order Qty** and **Unit Price**, but any field that isn't grayed out is editable. If utilizing a **contract** add under Supplier Visible Additional Information section.
4. Select **Save & Close**.

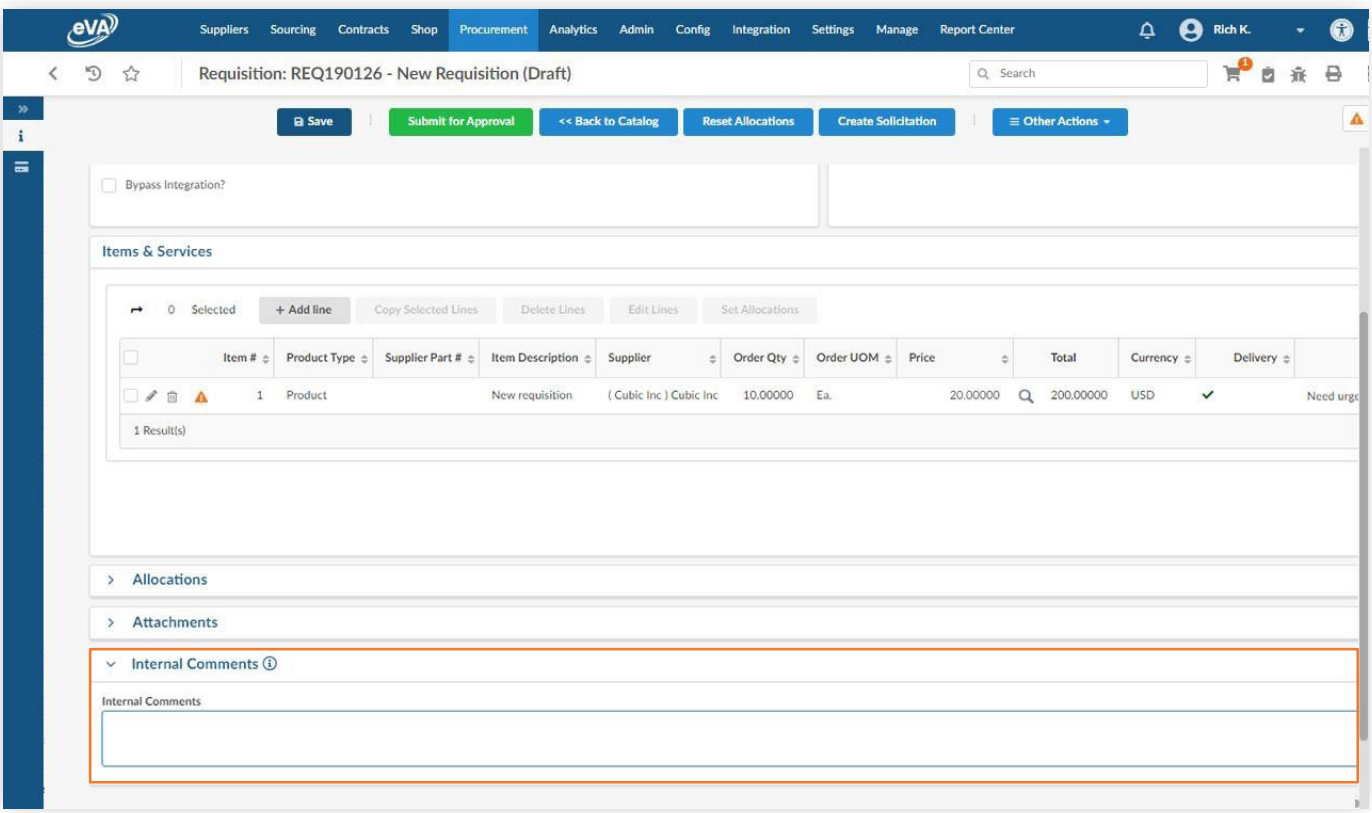


E. Add Comments/Attachments to a Requisition

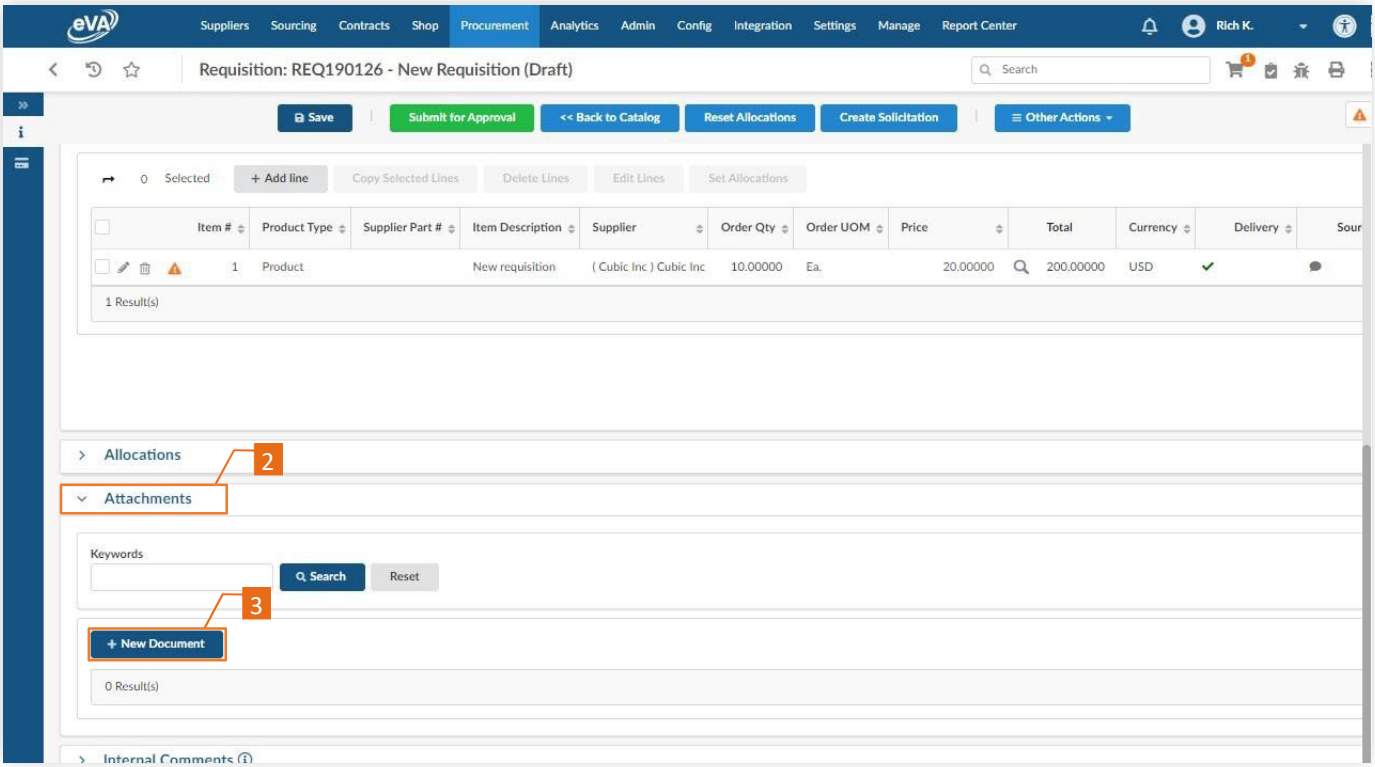
1. You can add comments to the requisition header in two different places. Where you put your comment(s) depends on whom you wish to see the comment(s).
    a. Supplier-visible comments on the header should be added to the **Comment** box at the top of the requisition under the **Ship To/Bill** To addresses.



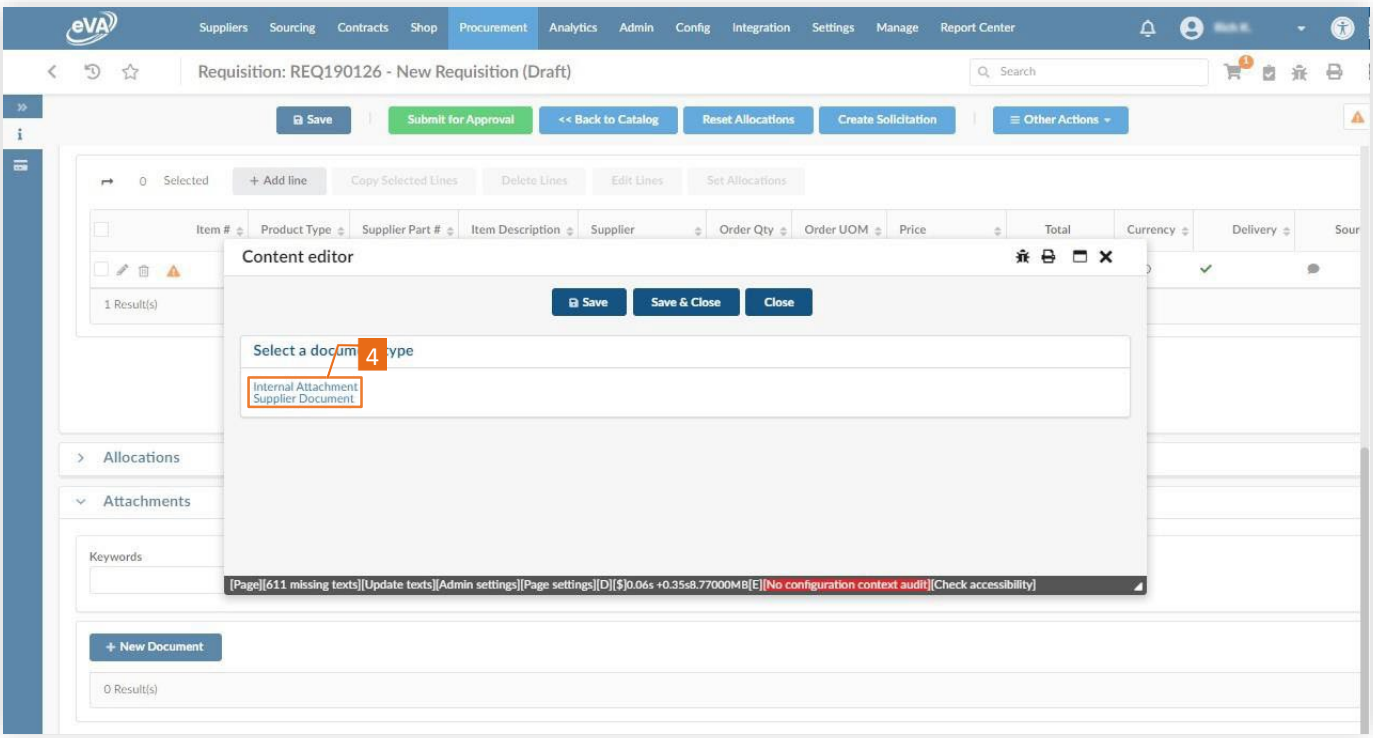
    b. Internal comments should be added to the **Internal Comments** box at the bottom of the requisition header under the **Attachments** section.



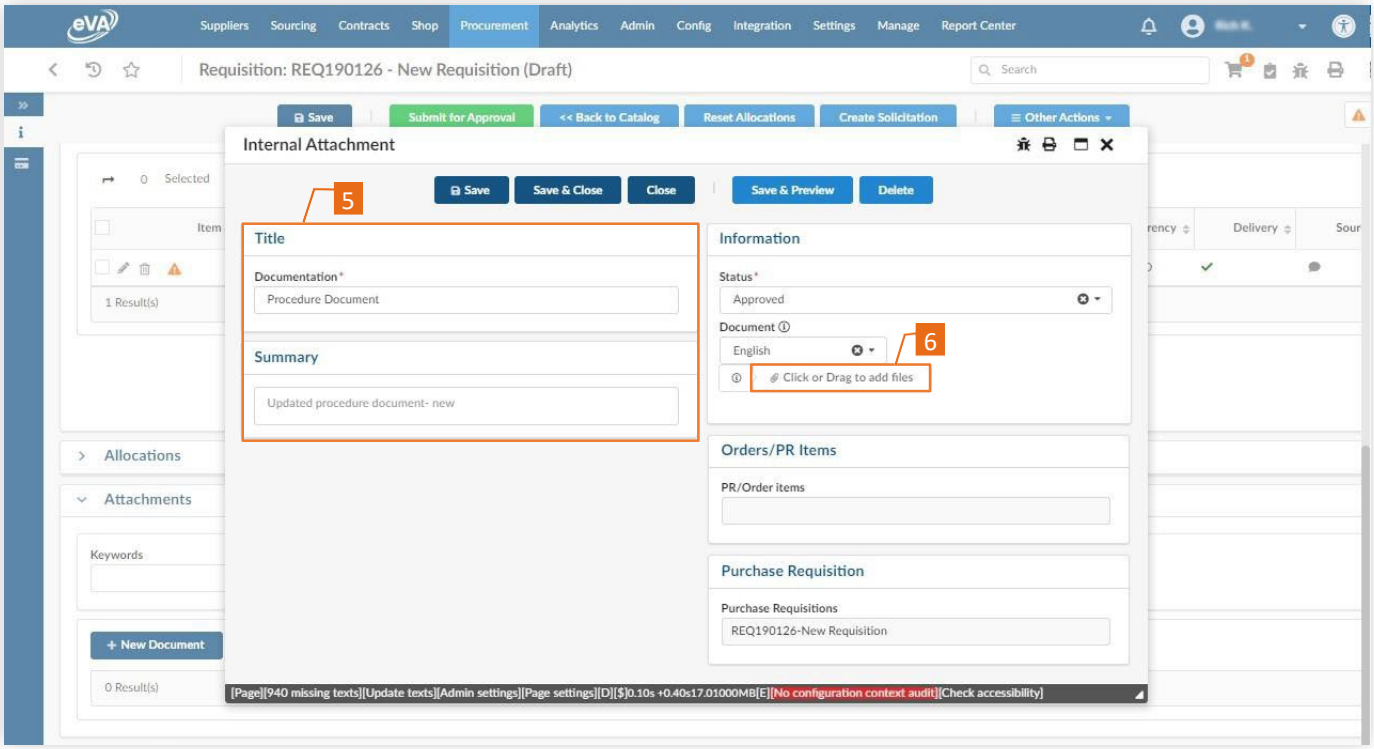
2. To add an attachment, expand the **Attachments** section.
3. Select + **New Document**.



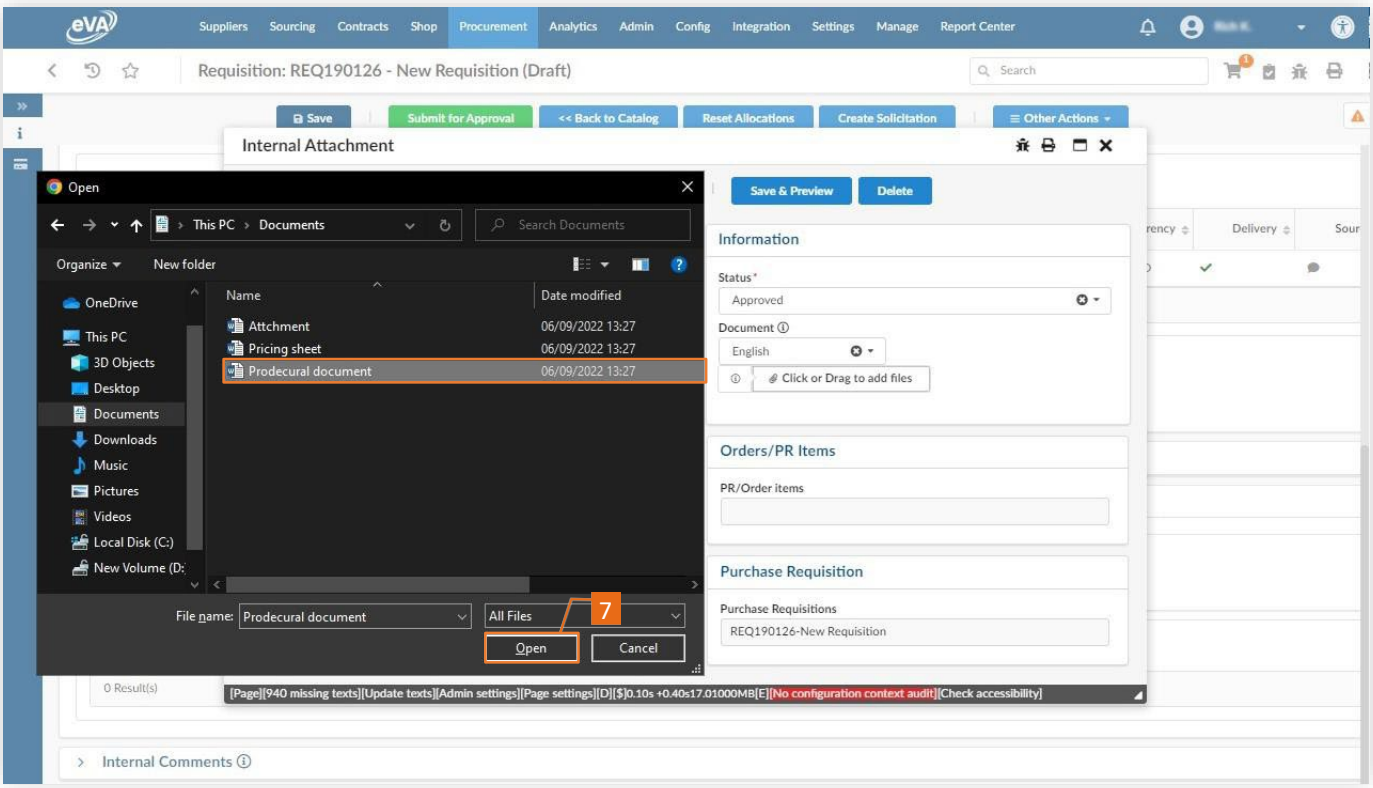
4. Select the type of document you want to attach, that is, an internally facing document or a document the supplier can view.



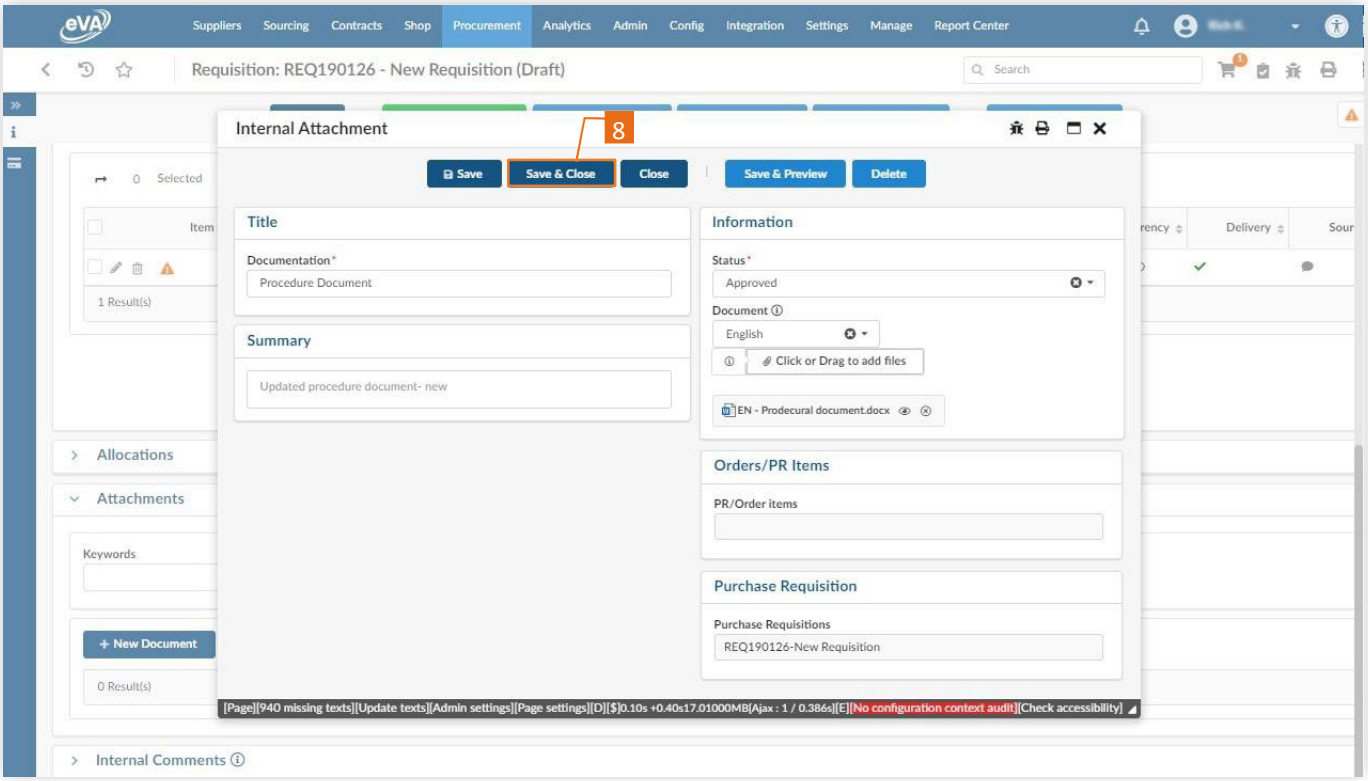
5. Enter the **Title** of the document in the **Documentation** field and enter a short summary of the document in the **Summary** field, but this is not required.
6. In the Information section, click the **paper clip** icon to add files.



7. Locate the file and attach it.

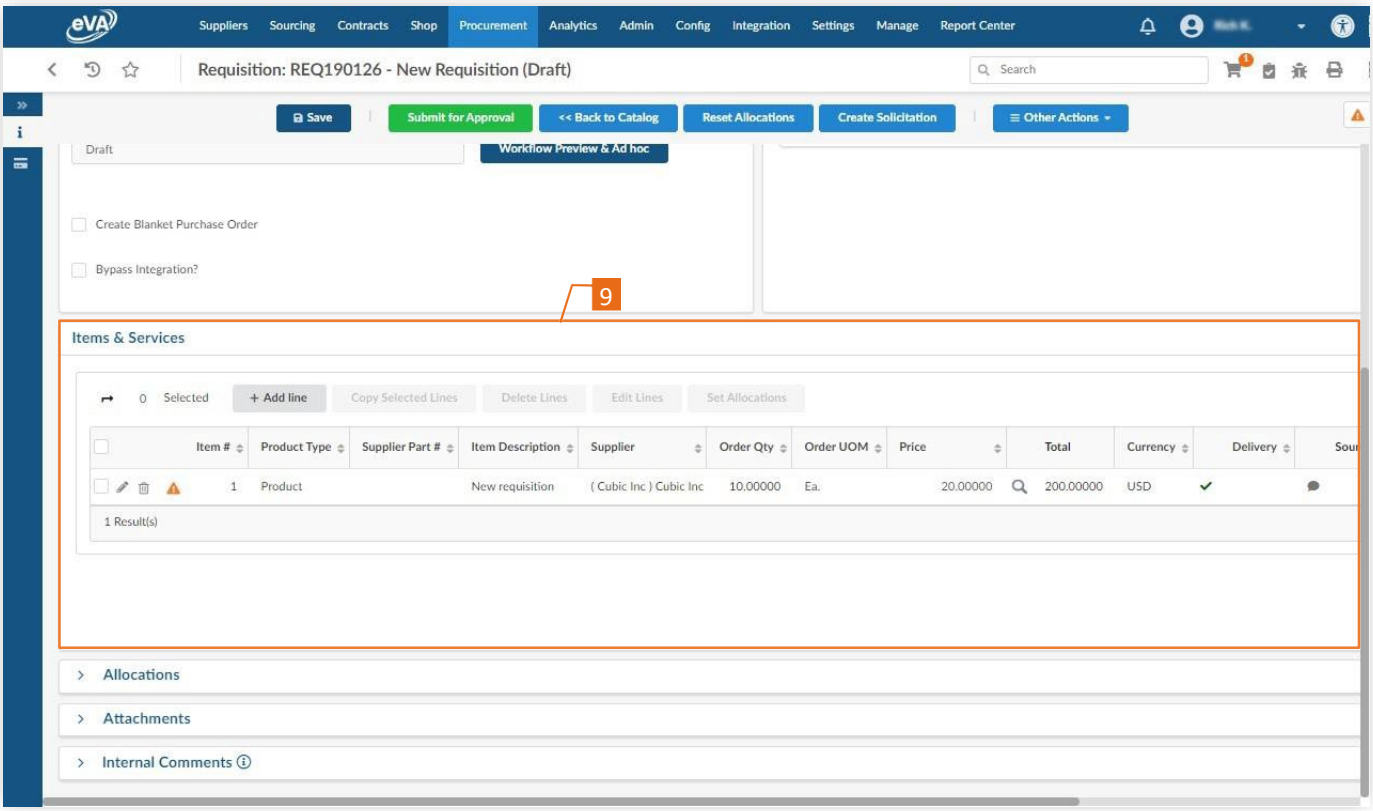


8. Select **Save & Close** in the pop-up.

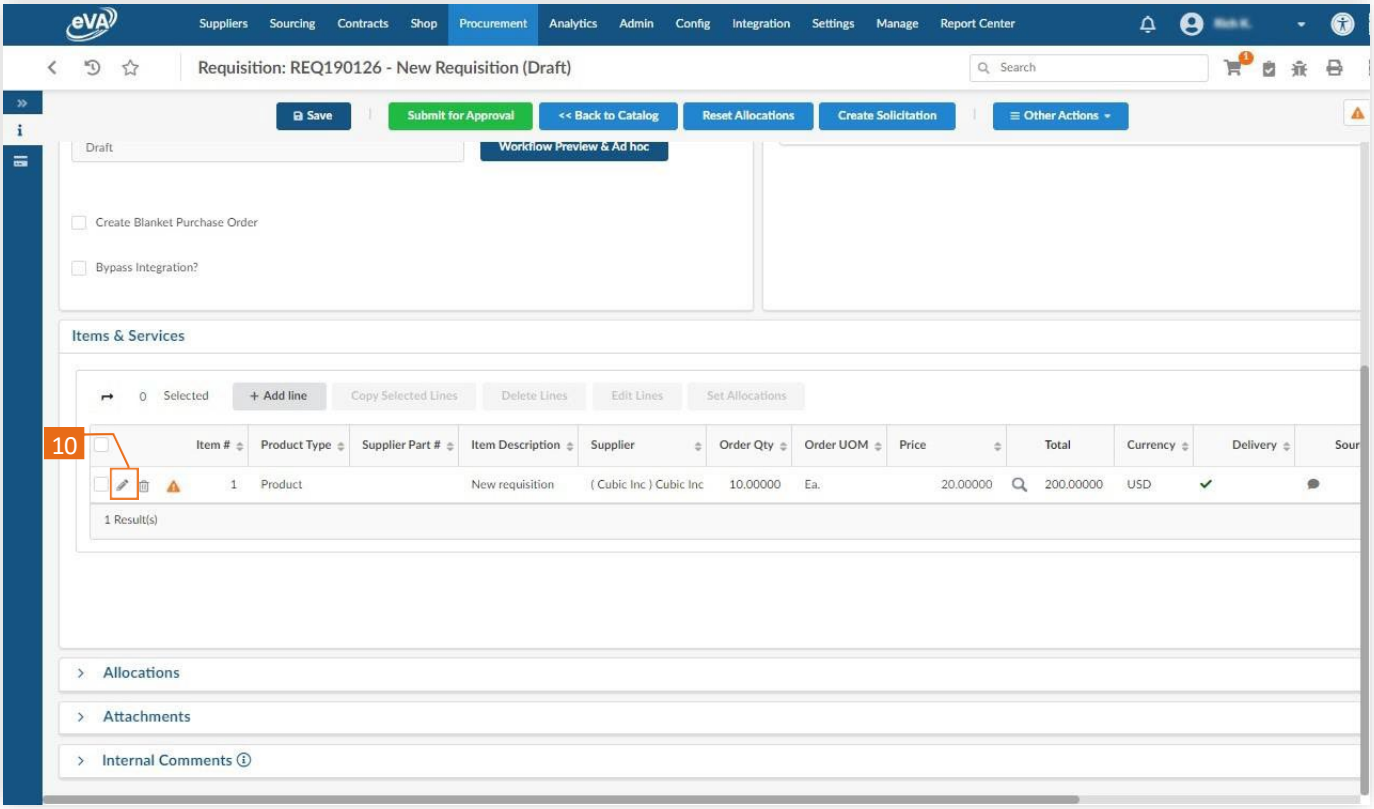


You can also add comments and attachments at the line-item level.

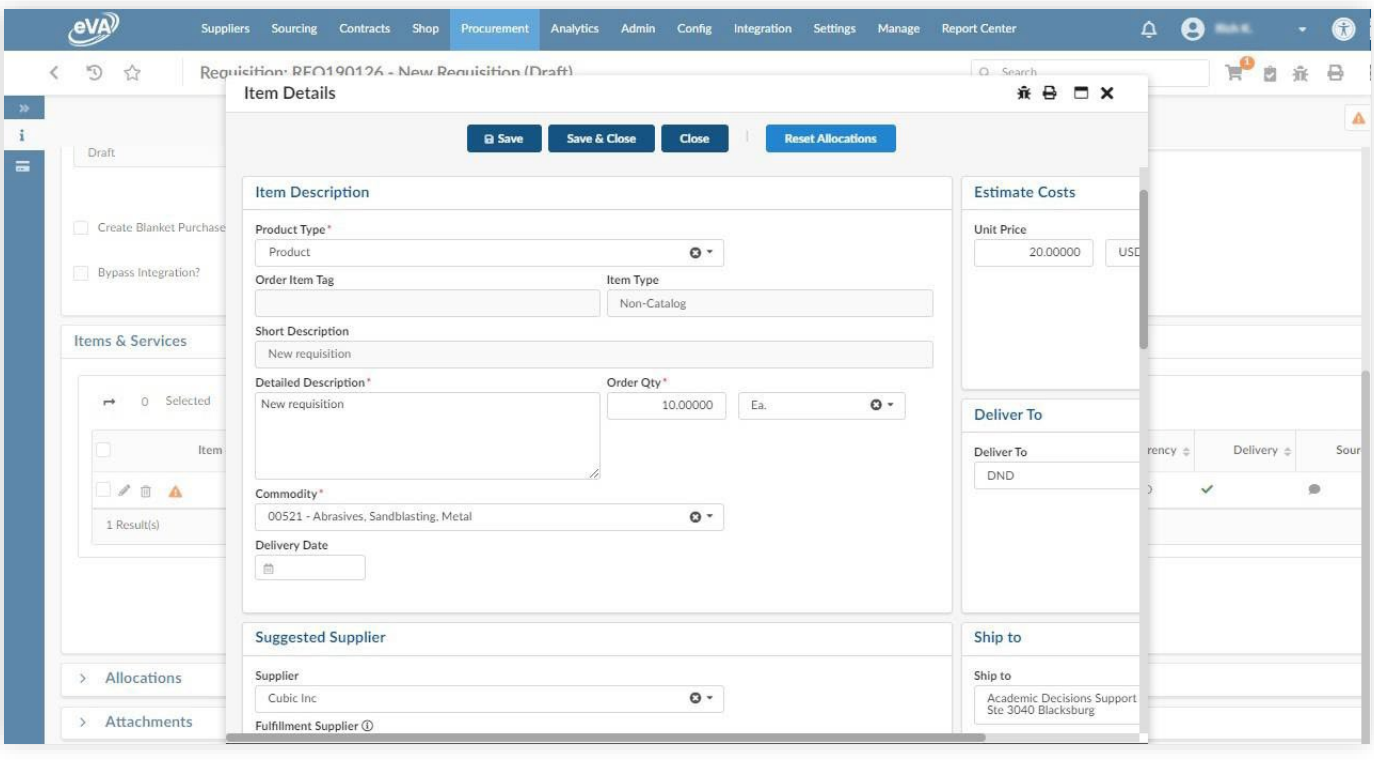
9. To add a comment to a line item, scroll down to the **Items & Services** section.



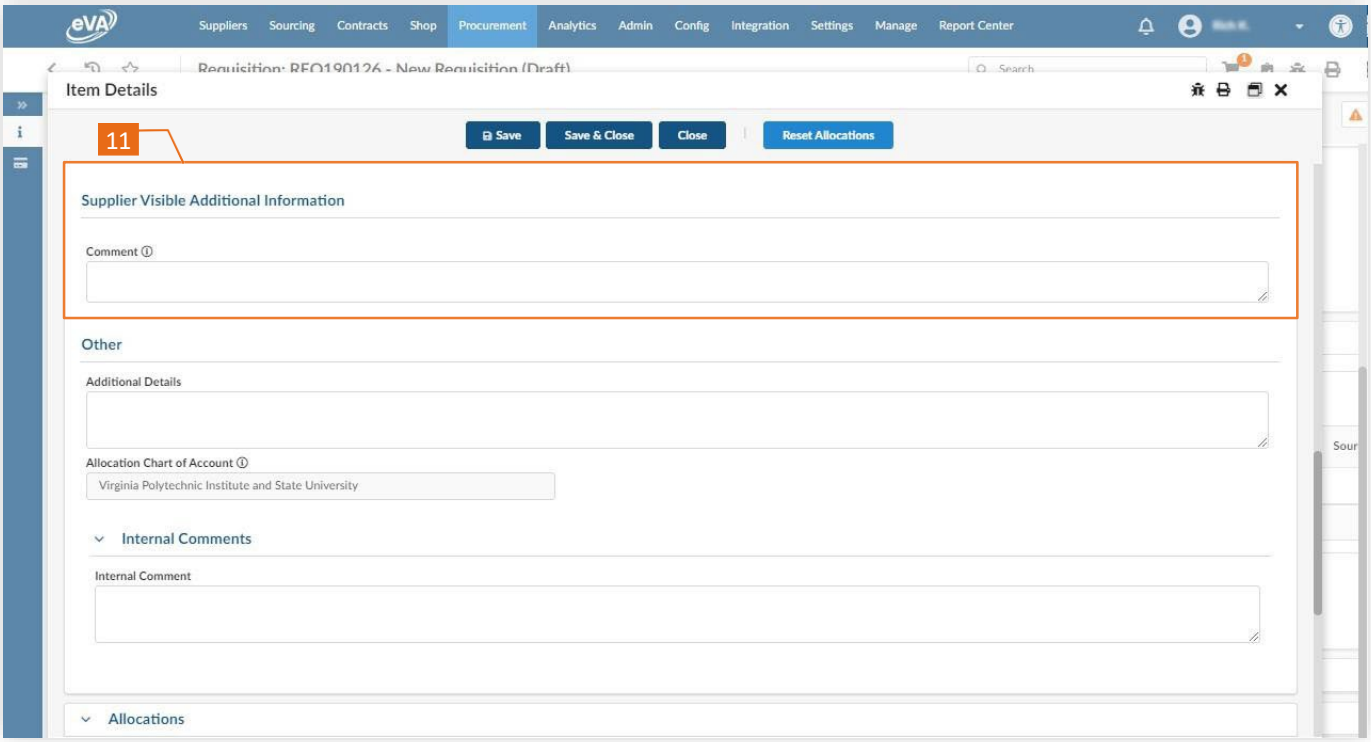
10. Select the **pencil** icon for the desired item.



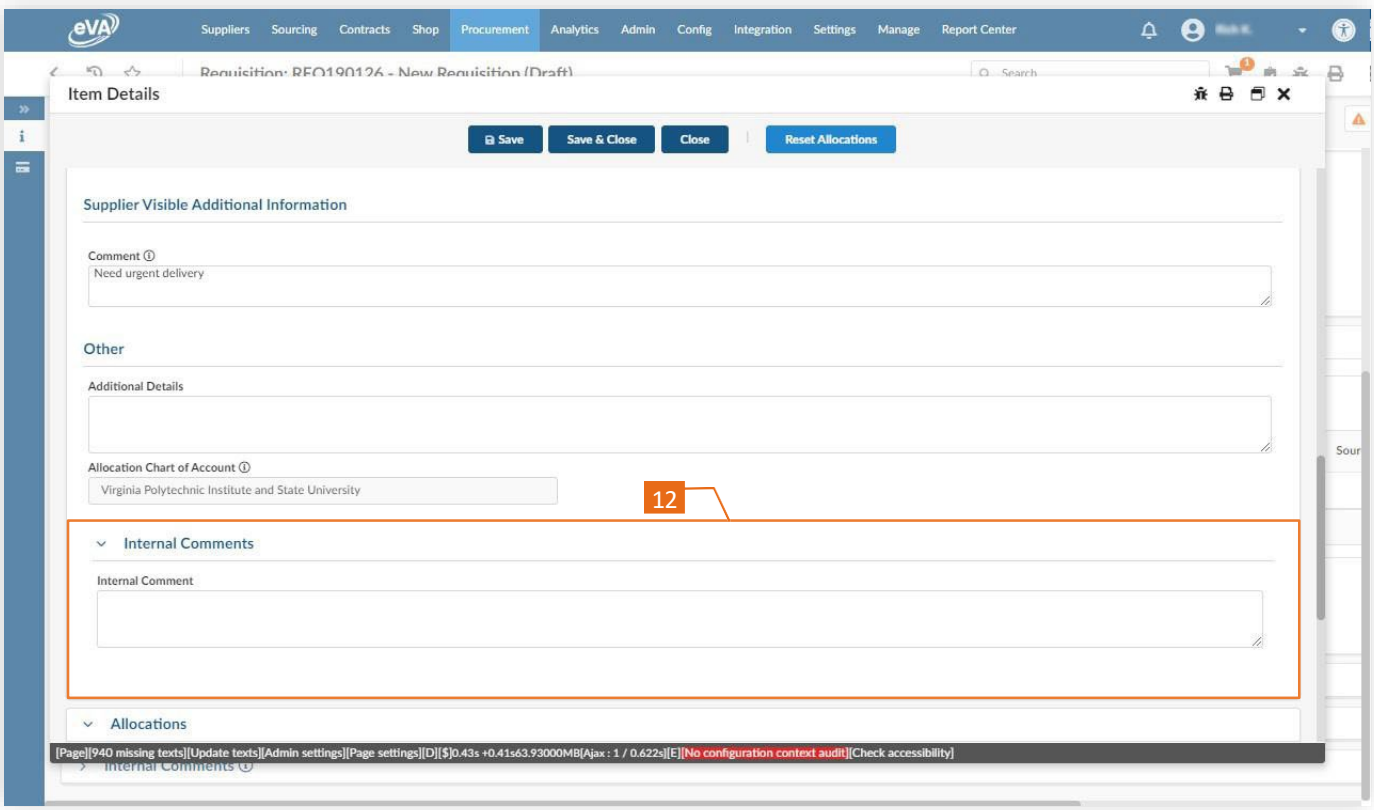
The **Item Details** pop-up window is displayed.



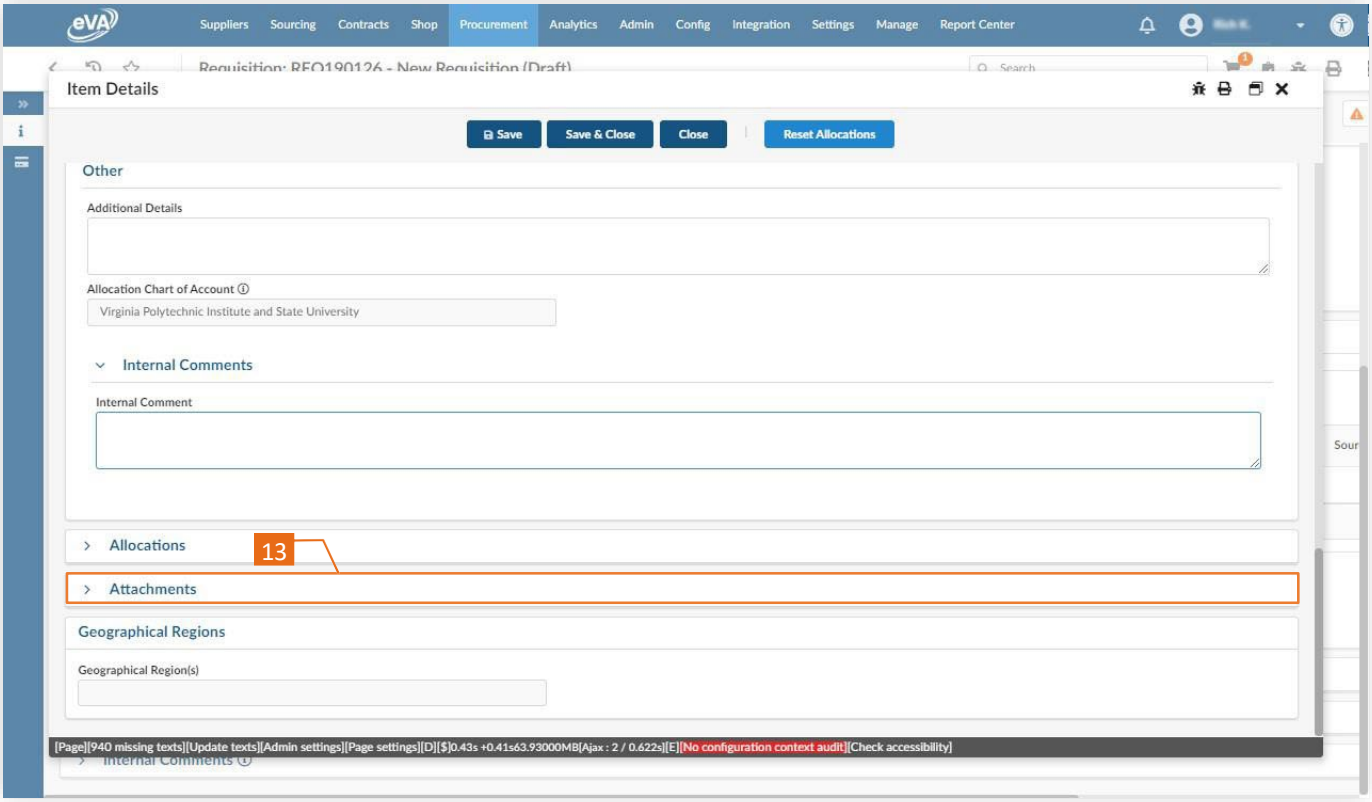
11. To add a comment for the supplier, scroll down to the **Supplier Visible Additional Information** section and enter the comment in the field provided.



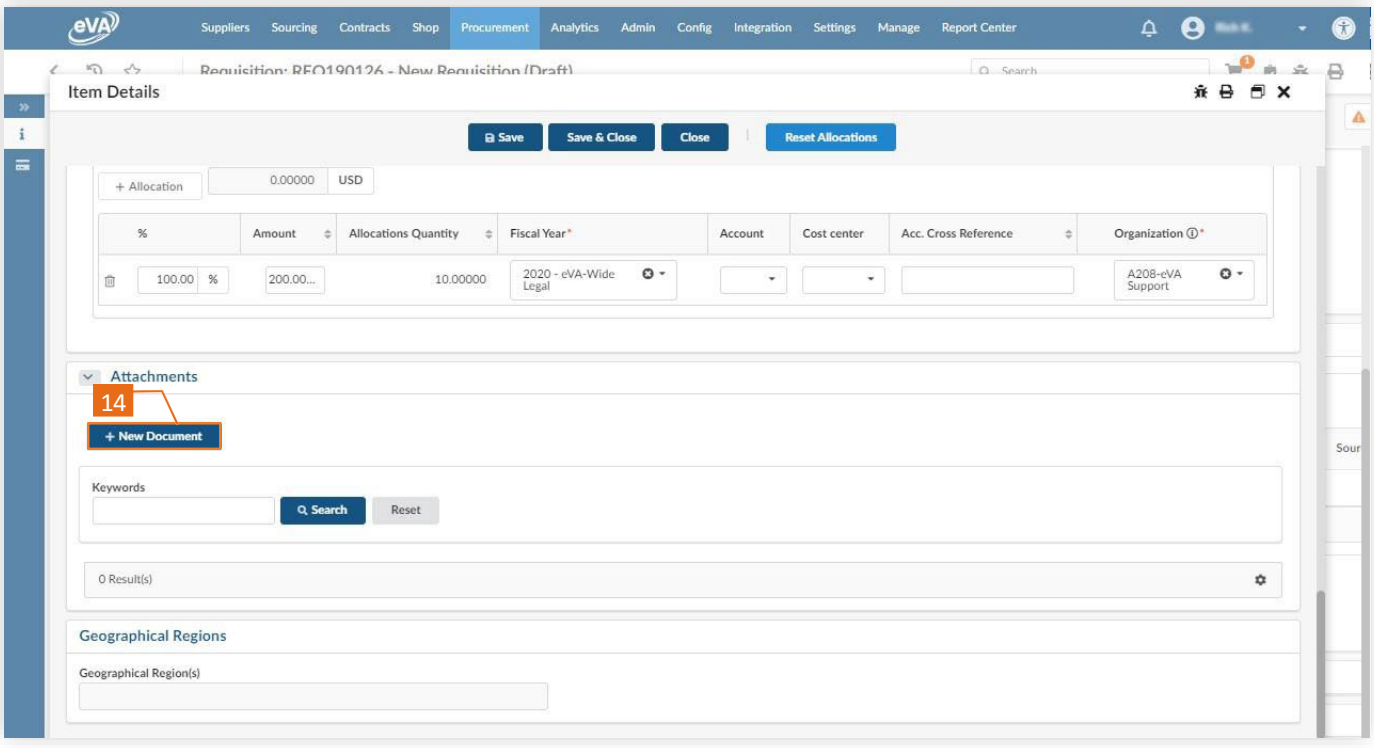
12. You can also enter a comment that will not be visible to the supplier. Go to the **Internal Comments** sections and enter the comment in the field provided.



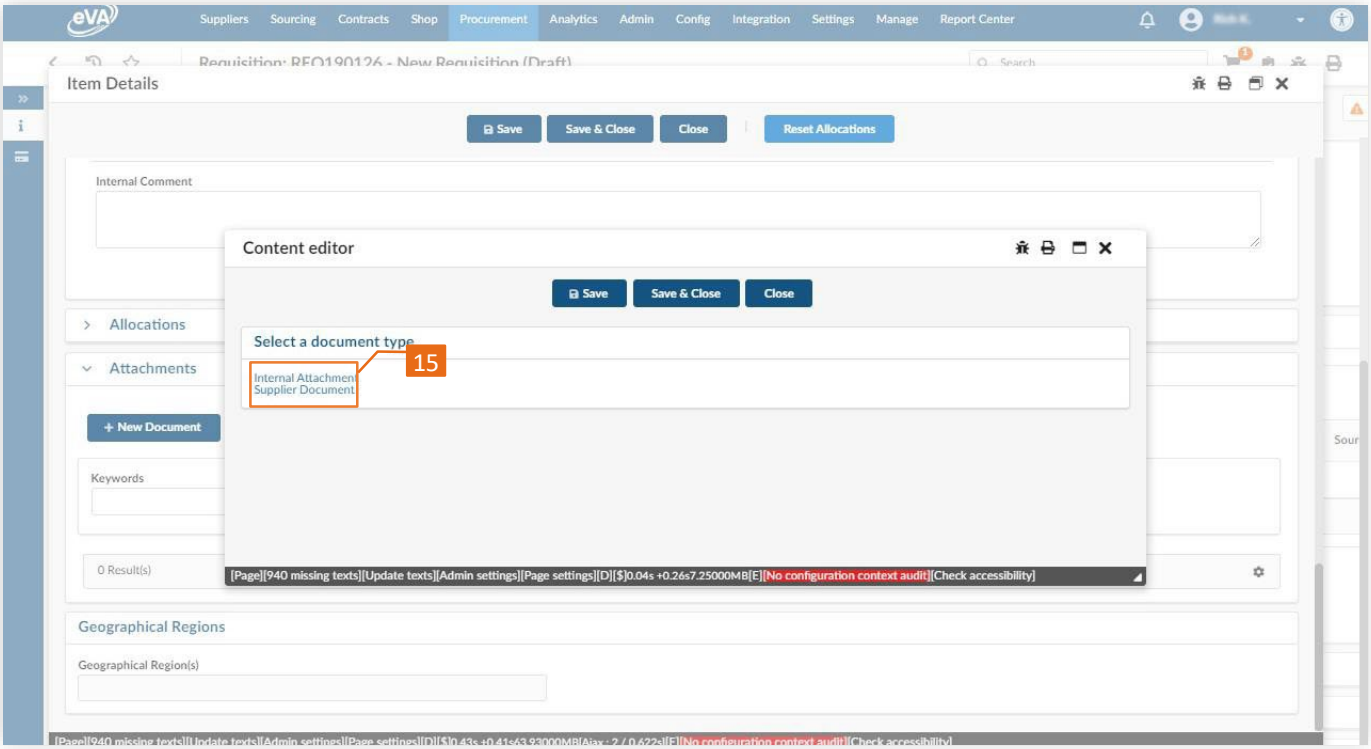
13. Scroll down to the **Attachments** section and click the arrow to expand the section.



14. Select + **New Document**.

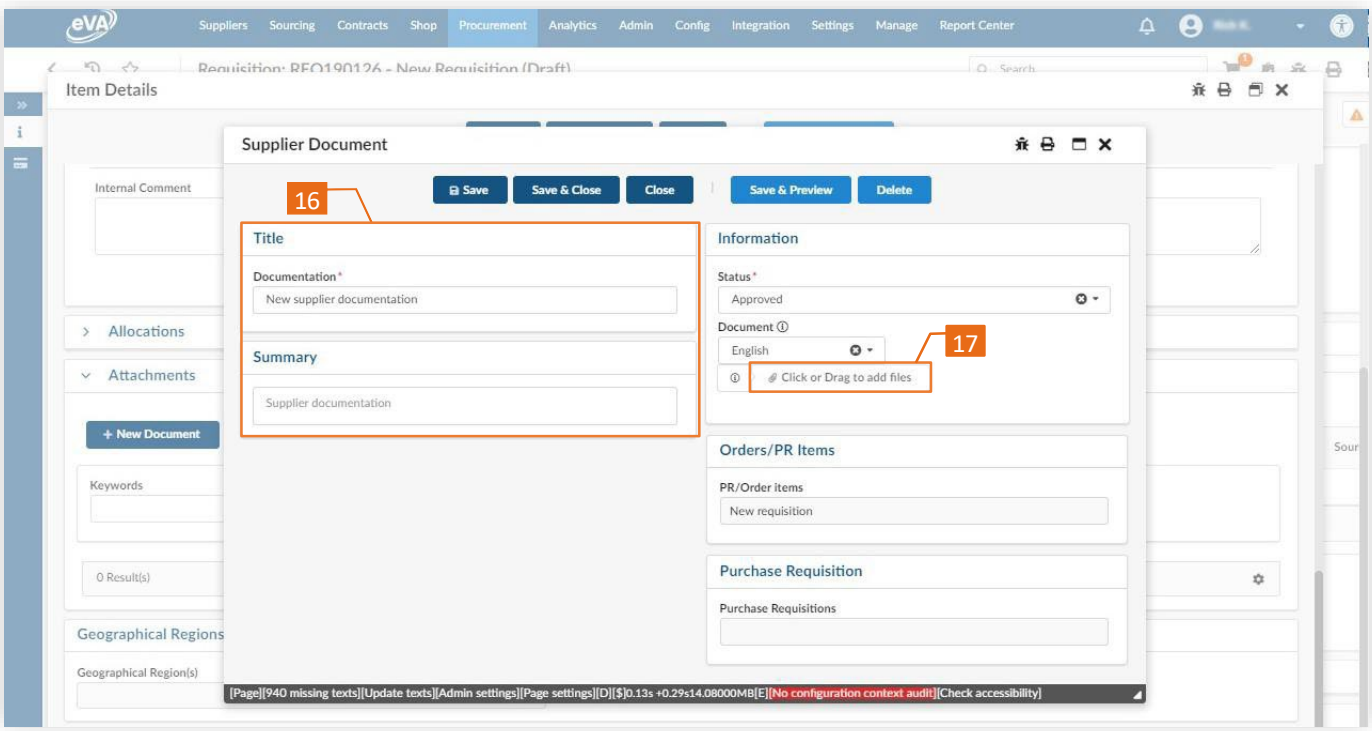


15. Select the type of document you want to attach: an internally facing document or a document the supplier can view.

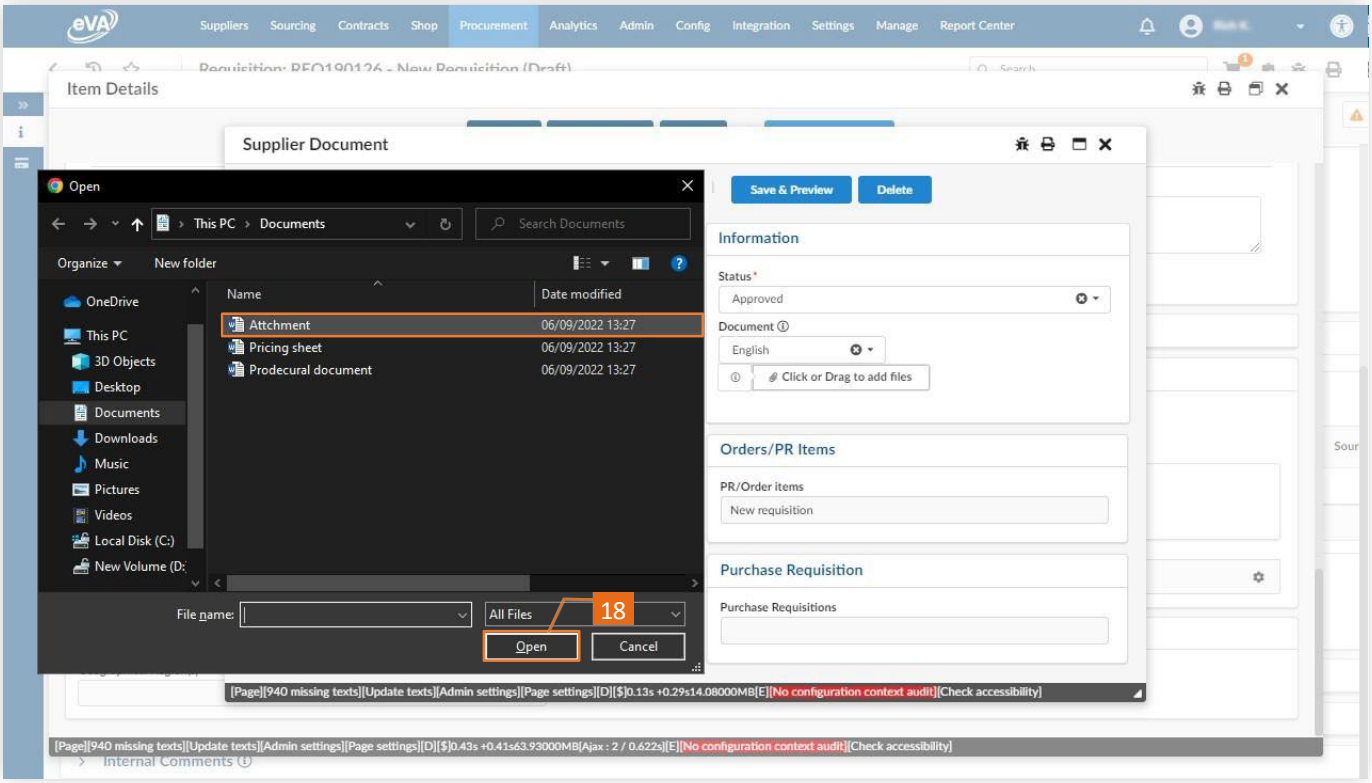


16. Enter the **Title** of the document in the **Documentation** field and enter a short summary of the document in the **Summary** field, but this is not required.

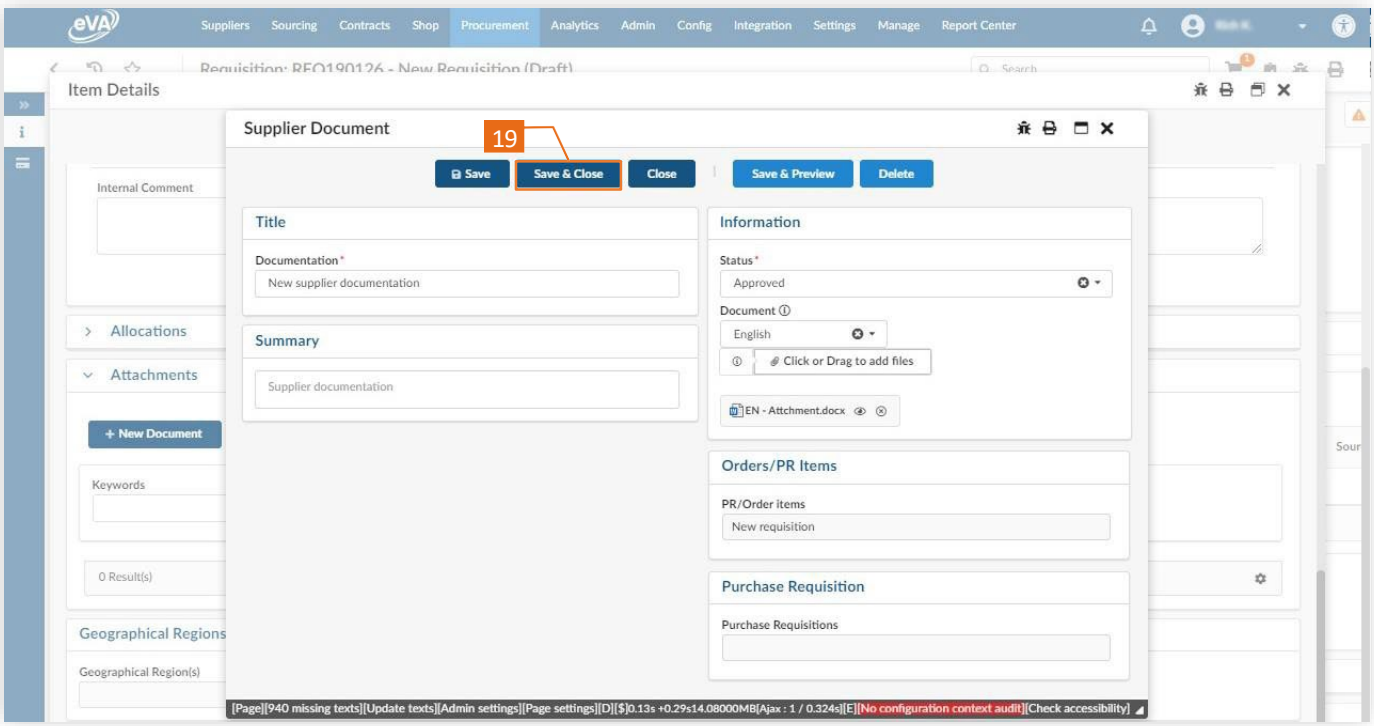
17. In the **Information** section, select the **paper clip** icon to add files field.



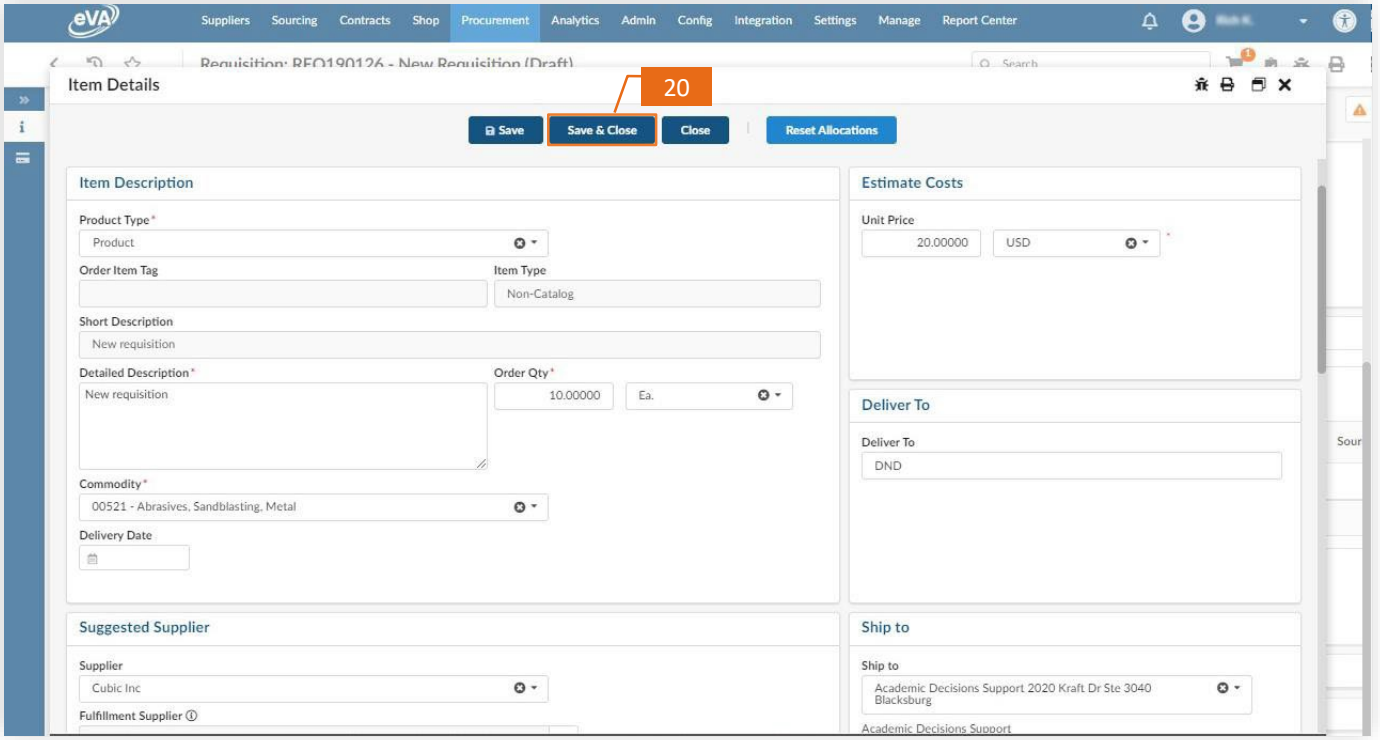
18. Locate the file and attach it.



19. Select **Save & Close** to save the details.

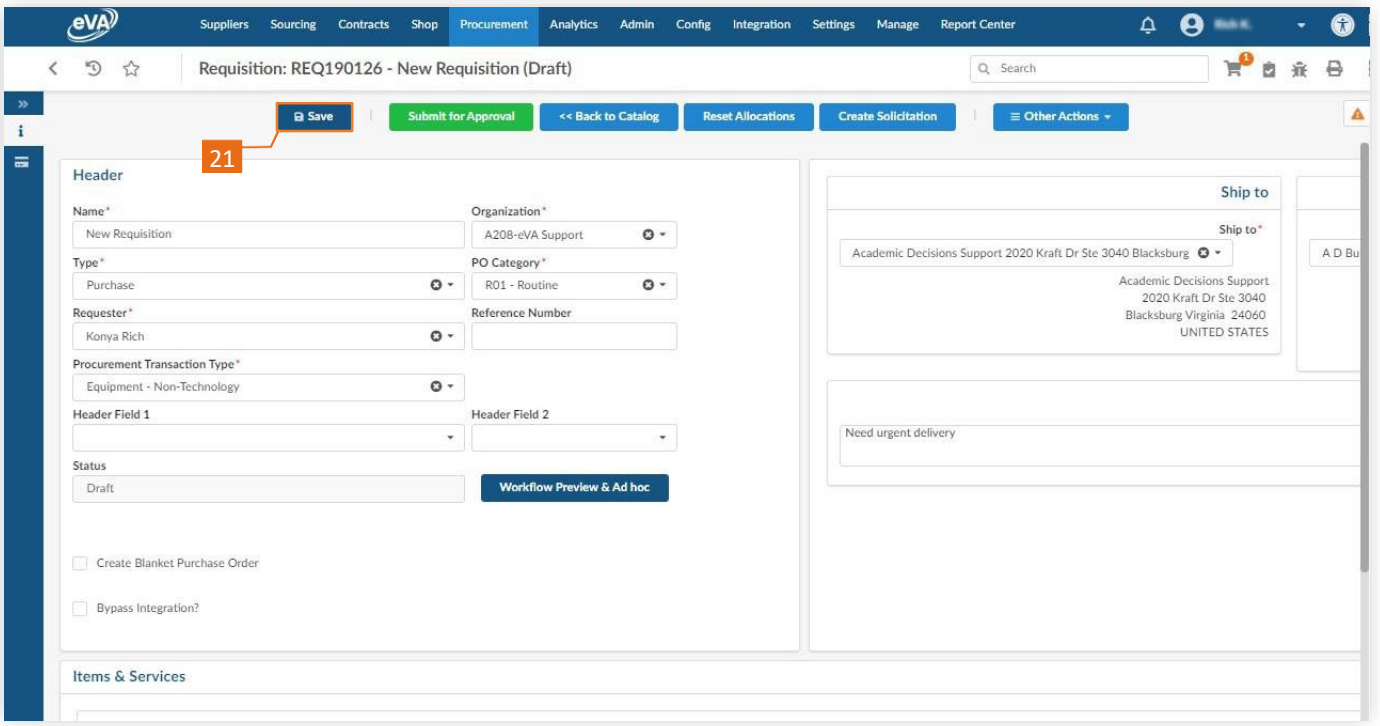


20. Select **Save & Close** to save all line-item details and return to the requisition page.



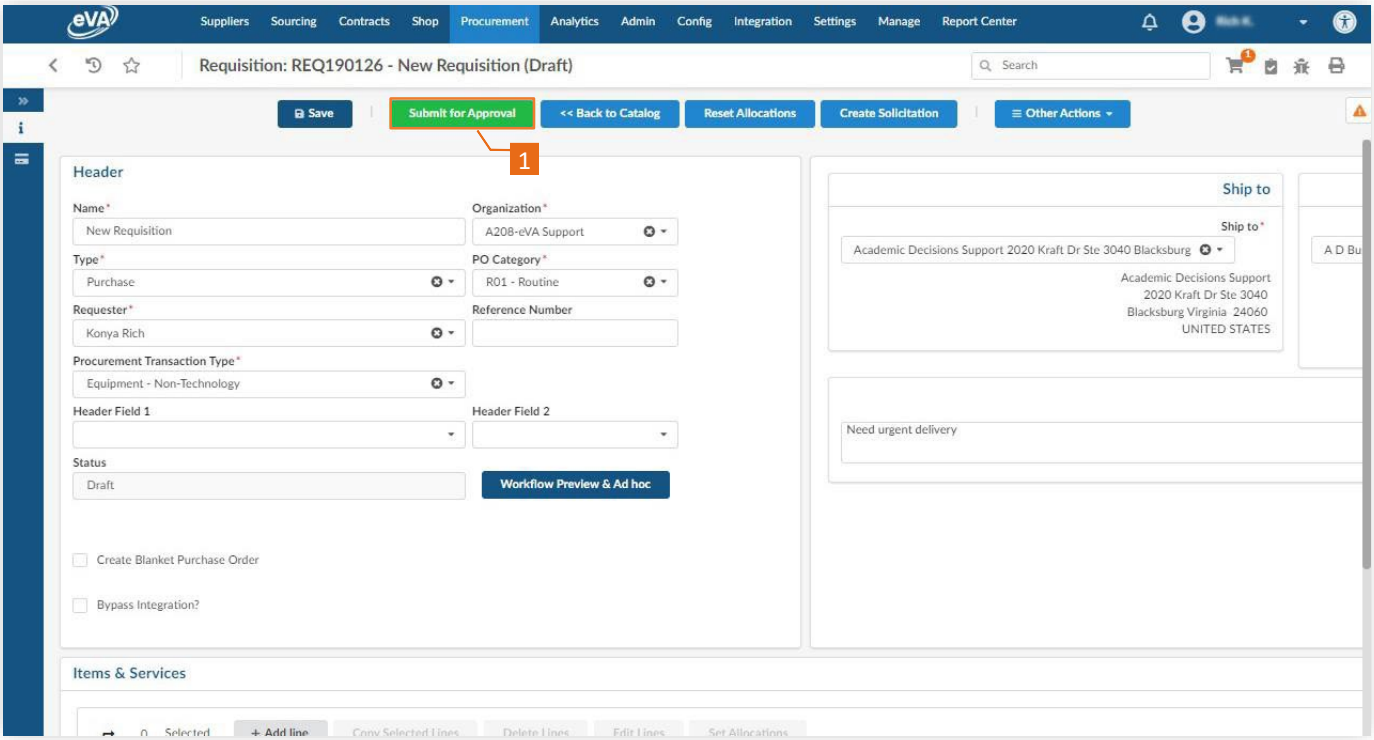
21. Select **Save**.

As a result, all the comments and attachments are saved to the requisition.

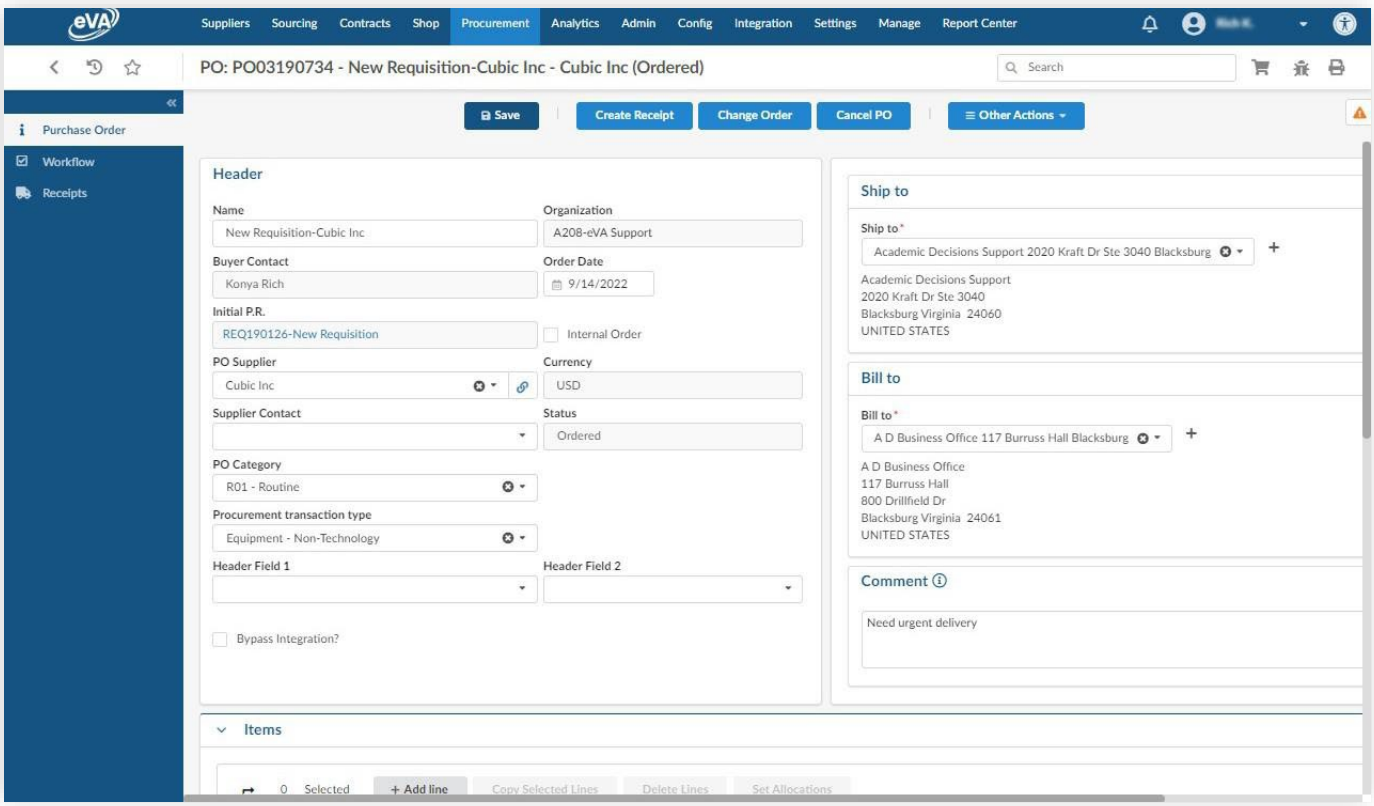
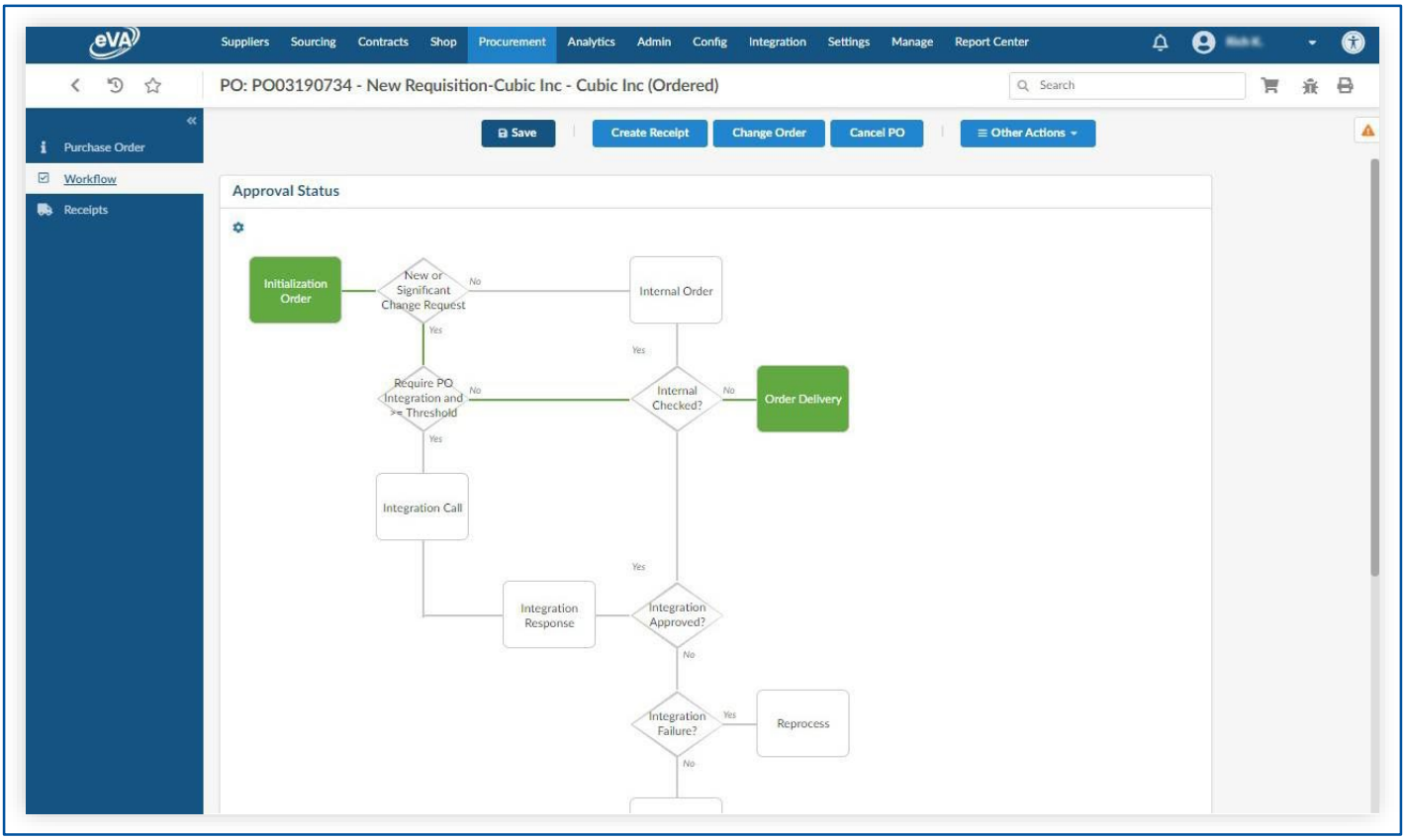


F. Submit a Requisition

1. Select the **Submit for Approval** button.



Once the requisition is submitted, you will be navigated to the **Purchase Order** screen.



You can view the approval workflow by clicking on the **Workflow** tab, designated by the checkbox icon, on the left navigation of the requisition.