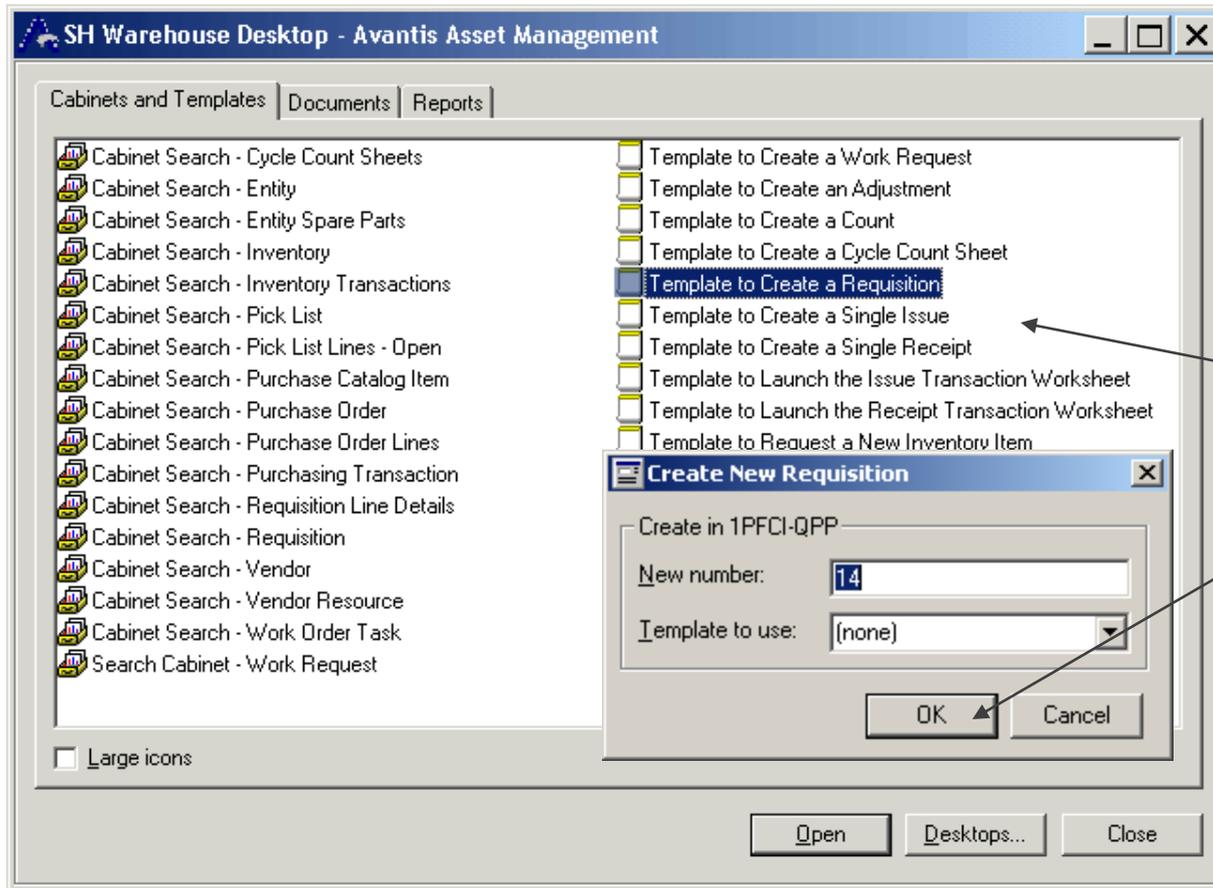


AVANTIS.PRO
Creating Requisitions

University Of Western Ontario



Purchase Requisition



From the Requester desktop:

- Select “Create Requisition”.
- Accept suggested number.
- Click OK.

Purchase Requisition – Header Info

Requisition 14 - General Information

File Edit View Window Help

14 Purchase for Line 16

General Keywords Description

Title: Purchase for Line 16

Requisition type: Standard

Requester Information

Requestioned by: MCADMIN

Name: MCADMIN

Telephone: Ext:

E-Mail:

Department: I/T

Priority: Normal

Buyer: Mauro, Frank

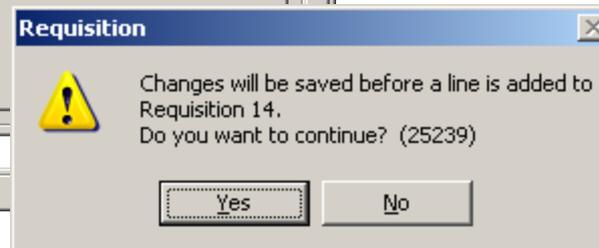
Estimated value:

Add Line...

You have not entered an e-mail address.

Enter:

- Title (could be WO#)
- Type (usually *General)
- Requisitioned by
- E-mail address
- Priority
- Then Click on Add Line...



Purchase Requisition – Create Lines

Requisition Line 14-1 - General Information

File Edit View Window Help

14-1

General Deliver To Vendors Charging Keywords Description

Item to request

Catalog item number: [] ...

Description: []

Quantity: [] amp

Estimated cost

Unit cost: [] per amp

Total cost: []

Fulfillment dates

Required on: [] at []

Not required after: []

Quote requested

For Help, press F1 IPFCI-QPP NUM

- Enter a valid catalog item from the cabinet
- For non-stock items, go to the cabinet.

Purchase Requisition – Cabinet Search

Prompted Filter Details

Include Purchase Catalog Items with the following characteristics:

Catalog item name
Contains: Non

Catalog item number
Contains:

Item type
Equal to: (any)

Manufacturer
Equal to: (any)

Manufacturer part number
Contains:

Vendor number
Equal to:

Vendor name
Contain:

Commodity
Equal to:
Contain:

Limit number of rows to:

OK Clear All Cancel

Enter in any combination of search criteria and click OK.

For non-stock purchases, choose :

- “Non-stores Material” followed by the correct unit of measure or
- “Non-stores Service” followed by the correct unit of measure

Purchase Requisition – General tab

Requisition Line 14-1 - General Information

File Edit View Window Help

14-1 ABRASIVE, ROLL, 24" X 5 YD 120 GRIT

General Deliver To Vendors Charging Keywords Description

Item to request:

Catalog item number: 50038417

Description: ABRASIVE, ROLL, 24" X 5 YD 120 GRIT

Quantity: [] ea

Estimated cost:

Unit cost: [] per ea

Total cost: []

Fulfillment dates:

Required on: [] at []

Not required after: []

Quote requested

You must enter the quantity you require.

1PFCI-QPP NUM

- Enter description from paper requisition
- Enter the quantity and date required
- Enter estimated costs if the PCI # is generic and you do not know the vendor.

Note : do not enter a cost on this tab if catalog item found

Purchase Requisition – Deliver To tab

Requisition Line 14-1 - General Information

File Edit View Window Help

14-1 ABRASIVE, ROLL, 24" X 5 YD 120 GRIT

General Deliver To Vendors Charging Keywords Description

Delivery details

Storeroom: [none]

Deliver to: [none]

When delivered, notify: MCADMIN

Deliver by: 10/28/2005 at 00:00

Reference number: []

Add to inventory

Requisition this item under consignment

Inventory details

Inventory ID: [none] Actions

For Help, press F1

1PFCI-QPP NUM

- Enter “SSB-PPD” in the deliver to field
- Change the person to notify if different from the requester.

Purchase Requisition – Charging tab

Requisition Line 14-1 - General Information

File Edit View Window Help

14-1 ABRASIVE, ROLL, 24" X 5 YD 120 GRIT

General Deliver To Vendors **Charging** Keywords Description

Distribution of charges

Work	Entity	Cost Group	Percentage	Fixed Amount	G/L Account	Expense Element	Plant	Cost Center	Project Number

Charge-to Details

Charge costs associated with this requisition to

Work order/task:

Work title:

Entity:

Entity name:

Cost group: M50231_Repair Materials

G/L account: 50231

Named Segment Group	Segment
Expense Element	50231 REPAIR MATERIA
Plant	
Cost Center	
Project Number	

Calculate amount to charge as follows

Percentage 100.00

Fixed amount C\$0.00

Add... Selected

- Click “Add” on the Charging tab
- Enter a Work Order Task (or select one of the WO’s from the cabinet).
- Check that appropriate Cost Group has defaulted from the item

Purchase Requisition – Charging Details

Charge costs associated with this requisition to

Work order/task: S3600HPE 1 ...

Work title: HPE MANUFACTURING

Entity: C3600HPE ...

Entity name: HPE MANUFACTURING

Cost group: M50231_Repair Materials

G/L account: 50231-501-3600

	Named Segment Group	Segment
▶	Expense Element	231 REPAIR MATERIALS
	Plant	Quaker Peterborough Plant
	Cost Center	3600 RTE CONTROL
	Project Number	

Calculate amount to charge as follows

Percentage 100.00

Fixed amount C\$0.00

OK

Cancel

The fields will now be populated and the G/L account number will appear.

Click OK to return to the Requisition Line.

Purchase Requisition – Price View

To add price and vendor information:

- Add or change vendor by unchecking the Select vendor box.
- Add or change the price by selecting the Price tab.

The screenshot shows a software window titled "Requisition Line 14-1 - Price". The window has a menu bar with "File", "Edit", "View", "Window", and "Help". Below the menu bar is a toolbar with various icons. The main content area is divided into several sections. On the left, there is a sidebar with a tree view containing "General Information", "OLE Canvas", "Price", "Purchases", and "Status". The "Price" tab is selected. The main area has a tabbed interface with "Catalog Selection", "Price", and "Site Settings" tabs. The "Catalog Selection" tab is active, showing a text area for "Description of item requisitioned:" containing "ABRASIVE, ROLL, 24\" X 5 YD 120 GRIT". Below this are fields for "Quantity:" (4 ea), "Estimated cost:" (empty), "Catalog item:" (50038417), and a dropdown for "Vendor:" (SBSI0001). There are also fields for "Vendor resource:" (120JF ABRASIVE, ROL) and "Alternate vendor resource:". At the bottom, there are checkboxes for "Requisition this item under consignment" and "Quote requested". The status bar at the bottom of the window displays "For Help, press F1", "1PFCI-QPP", and "NUM".

Purchase Requisition – Edit Price

Enter in a unit price and indicate the price is “Firm”. Note you can adjust the currency by clicking the “C\$” sign.

To create another line select the New icon or click the X to exit.

Requisition Line 14-1 - Price

File Edit View Window Help

14-1 ABRASIVE, ROLL, 24" X 5 YD 120 GRIT

General Information
OLE Canvas
Price
Purchases
Status

Catalog Selection Price Site Settings

Price information

Price from contract

Price is:

Firm
 Estimated
 No charge

If price is firm or estimated

Price: C\$1.000000 per ea

Total: C\$4.00

Freeze price
 Auto invoice upon receipt

Confirmation information

Price confirmed

Confirmed by: (none)

Confirmed by vendor contact: (none)

Confirmed on:

Confirmed price guaranteed until:

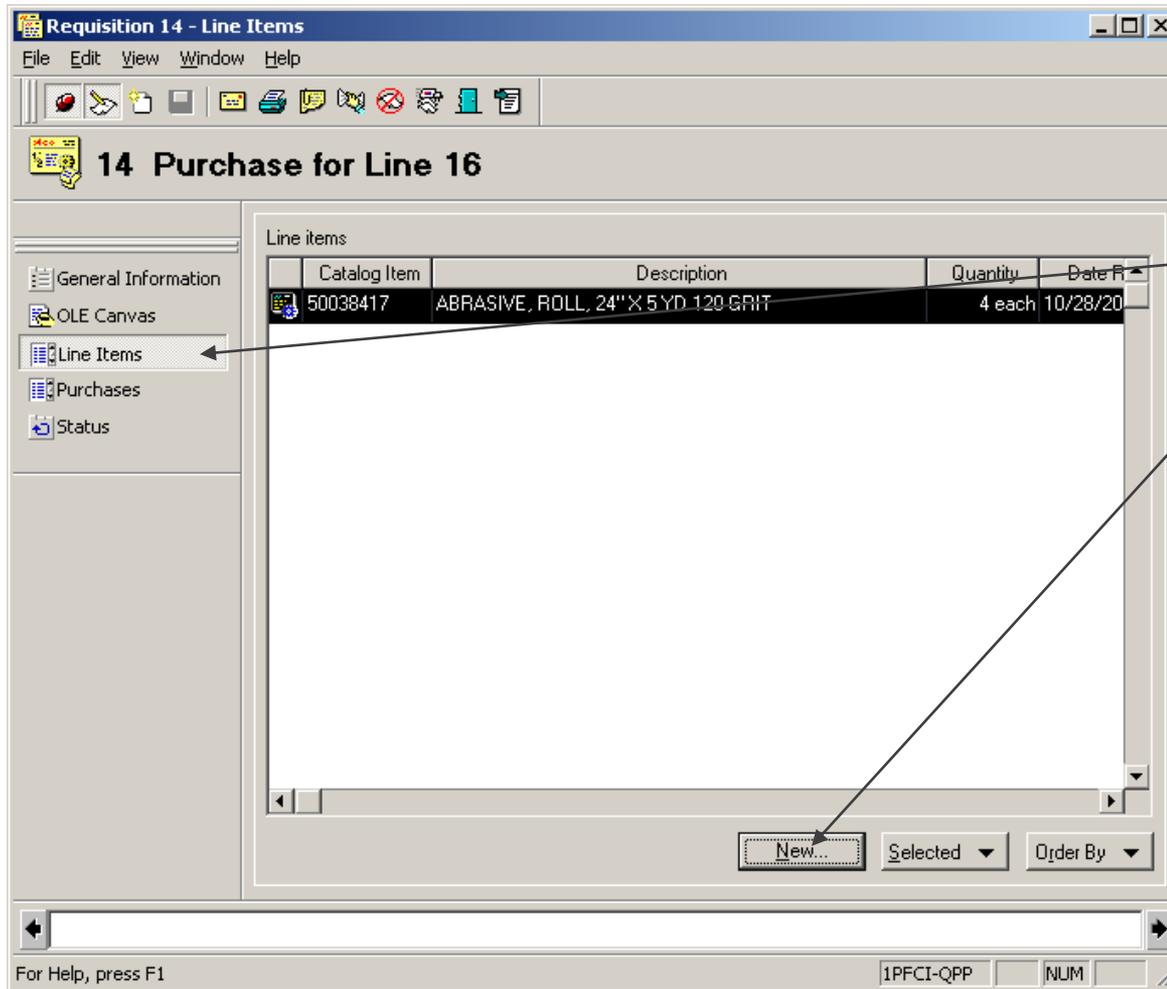
Promised by: 10/28/2005

Quantity confirmed: ea

For Help, press F1

1PFCI-QPP NUM

Purchase Requisition



- You can also create another line from the Requisition Line Items view by selecting the New button.
- Continue until requisition is complete