The University of Western Ontario

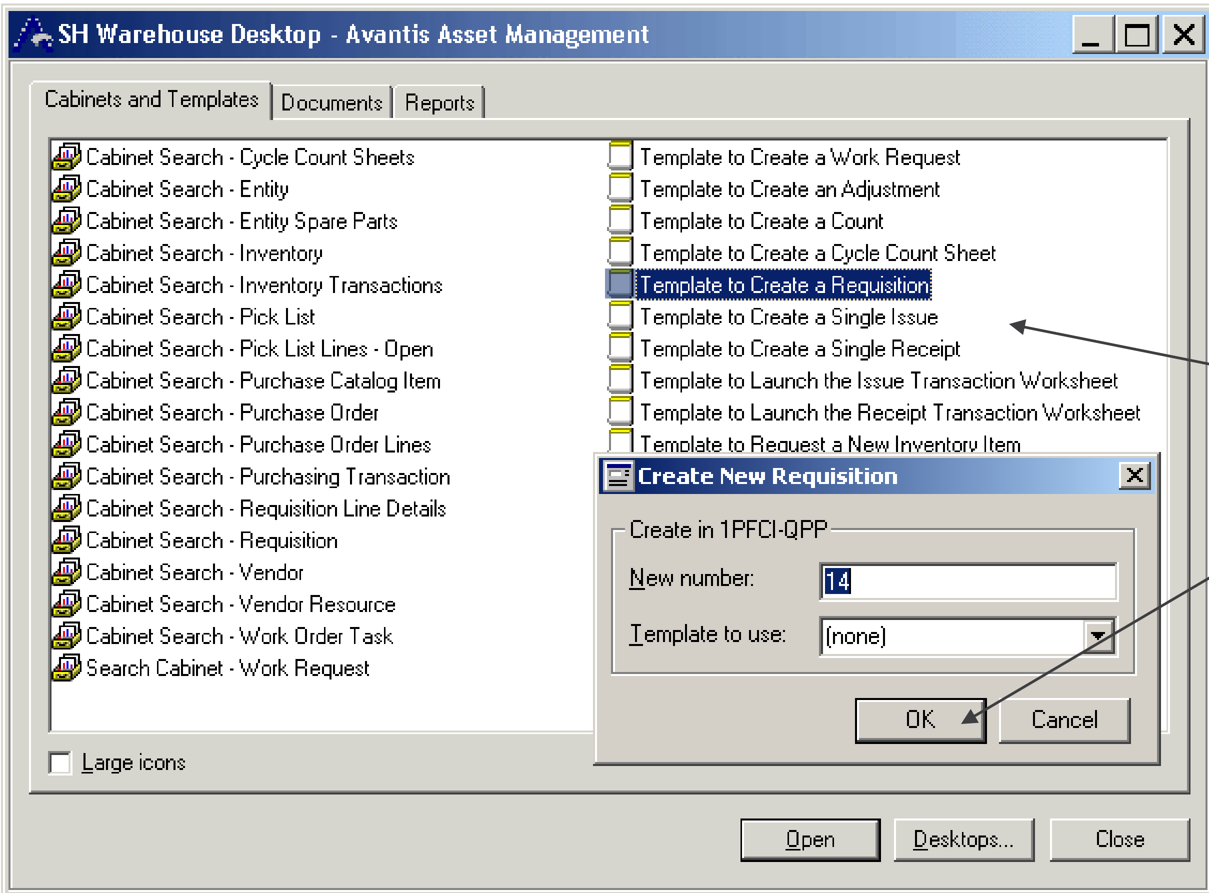
AVANTIS.PRO

Creating Requisitions

University Of Western Ontario

Physical Plant & Capital Planning Services

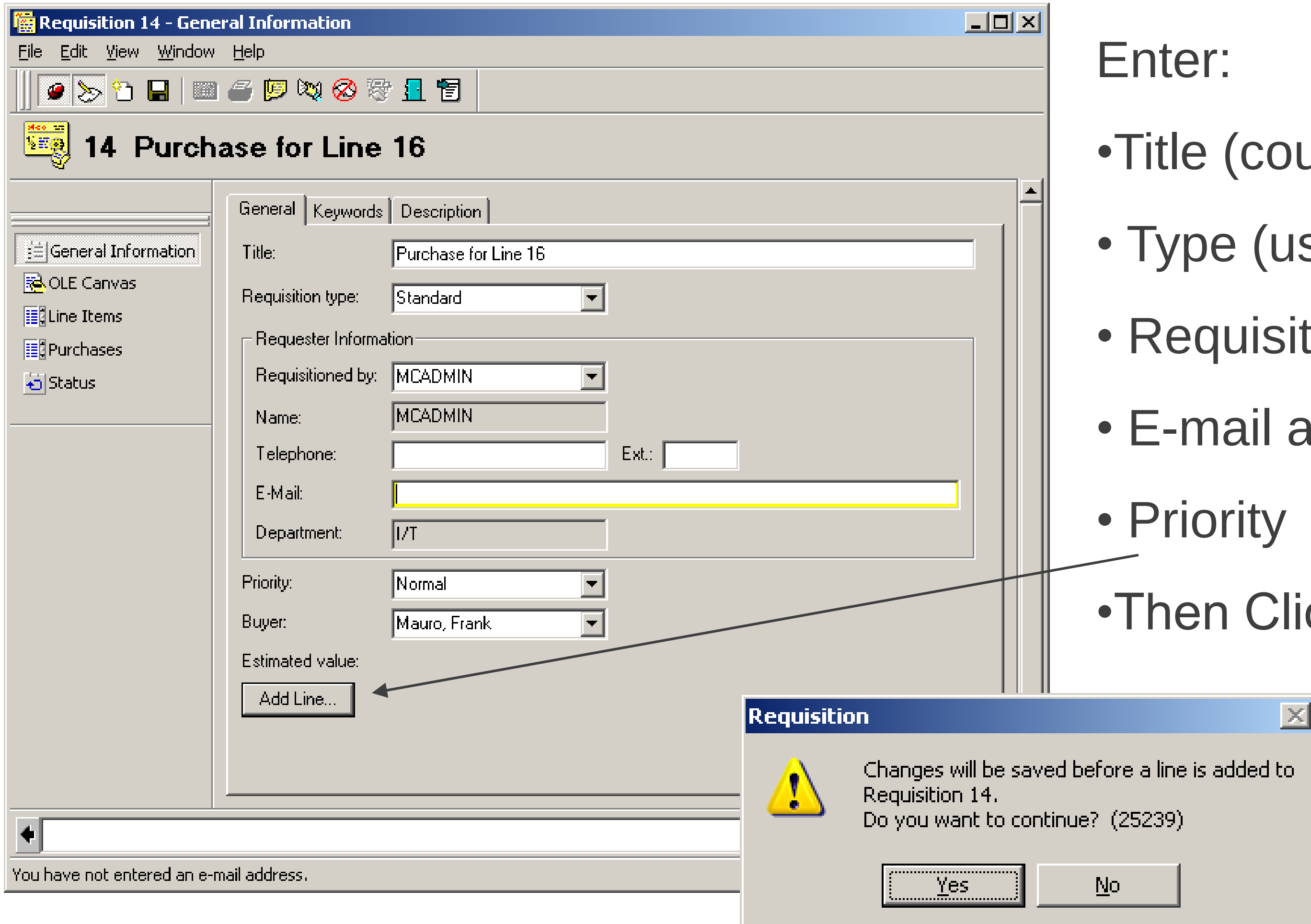
Purchase Requisition



From the Requester desktop:

- Select "Create Requisition".
- Accept suggested number.
- Click OK.

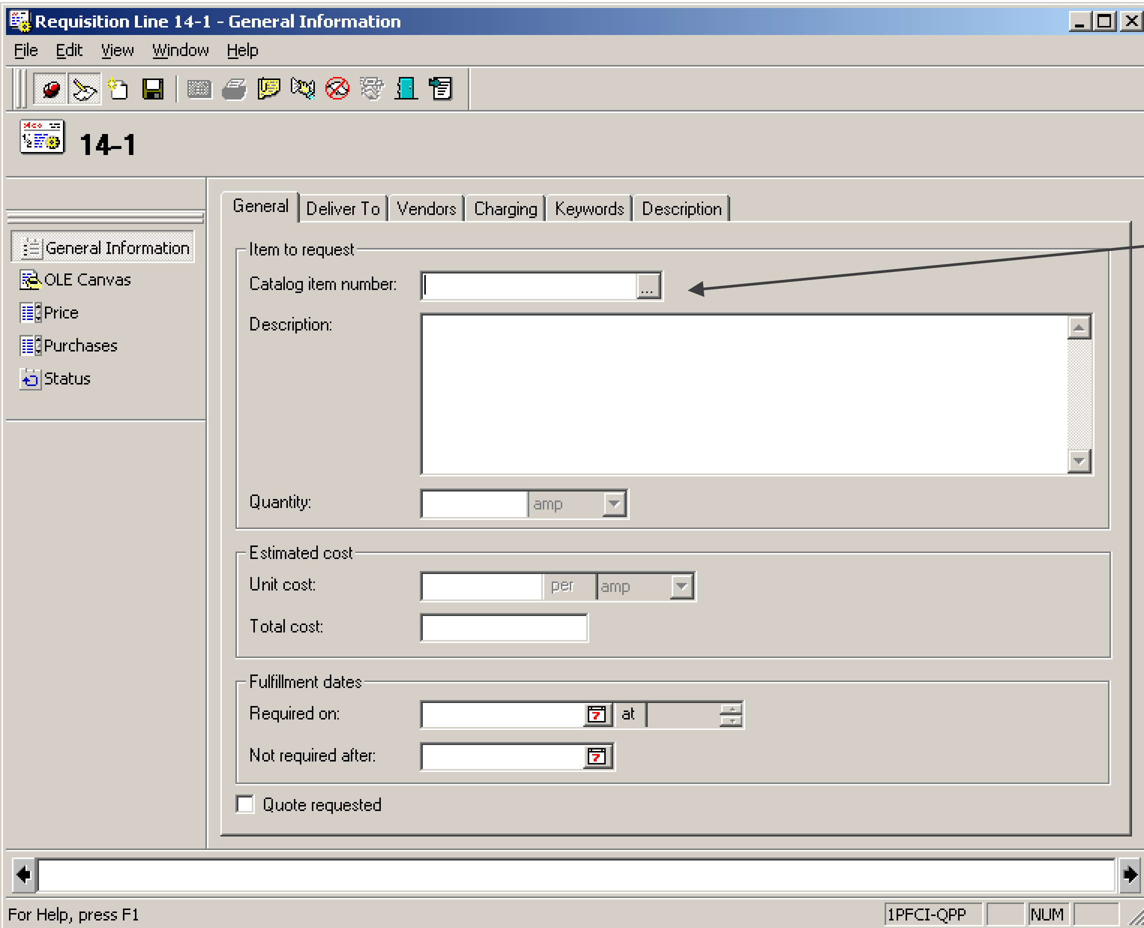
Purchase Requisition – Header Info



Enter:

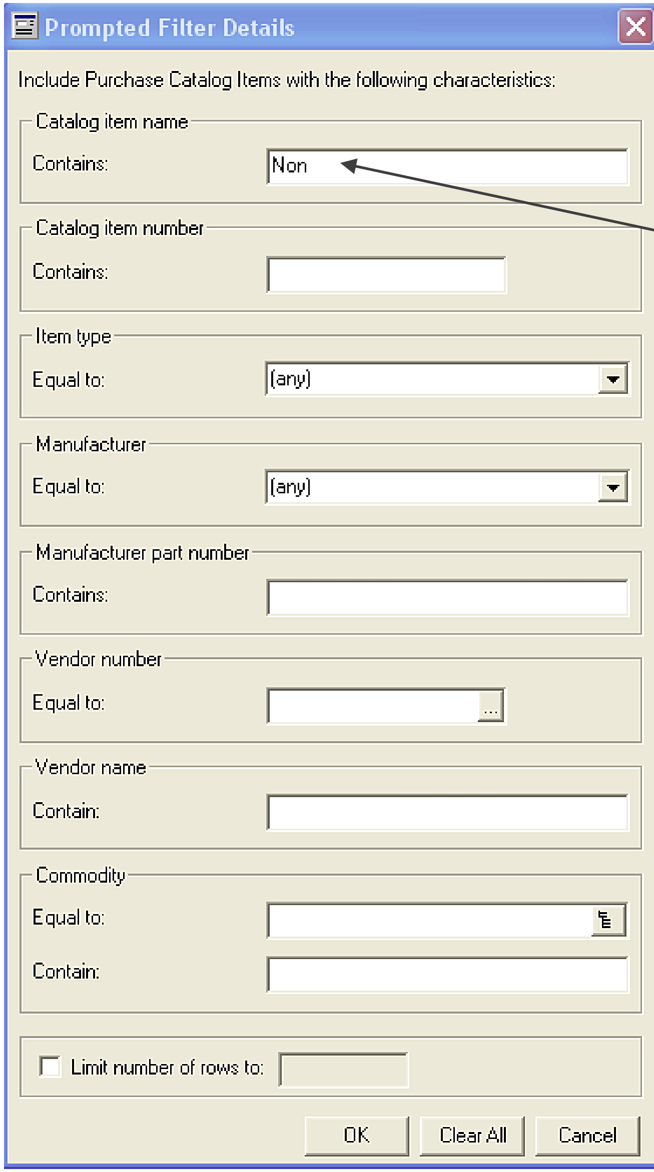
- Title (could be WO#)
- Type (usually *General)
- Requisitioned by
- E-mail address
- Priority
- Then Click on Add Line…

Purchase Requisition – Create Lines



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

Purchase Requisition – Cabinet Search

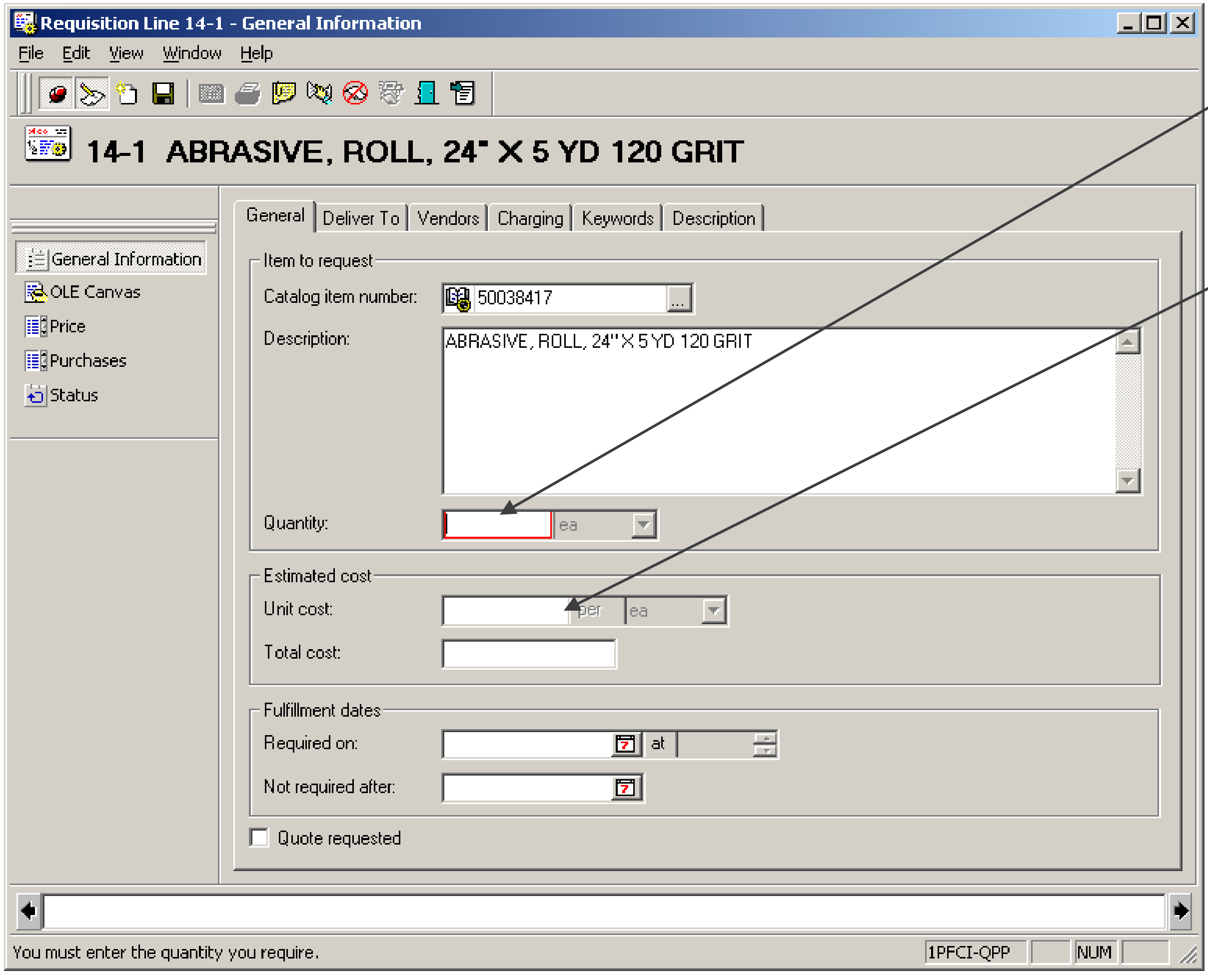


Enter in any combination of search criteria and click OK.

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

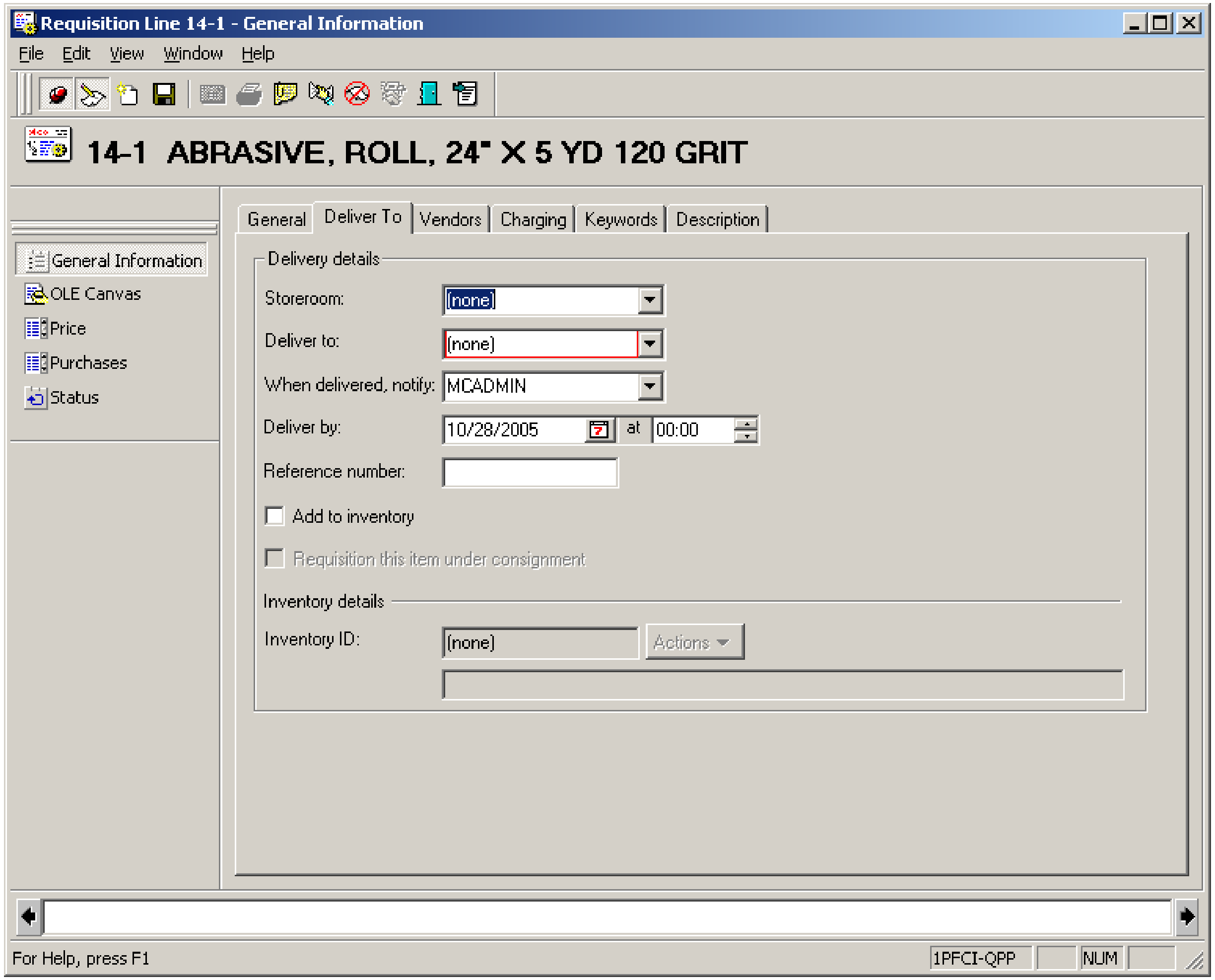
Purchase Requisition – General tab



- 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.

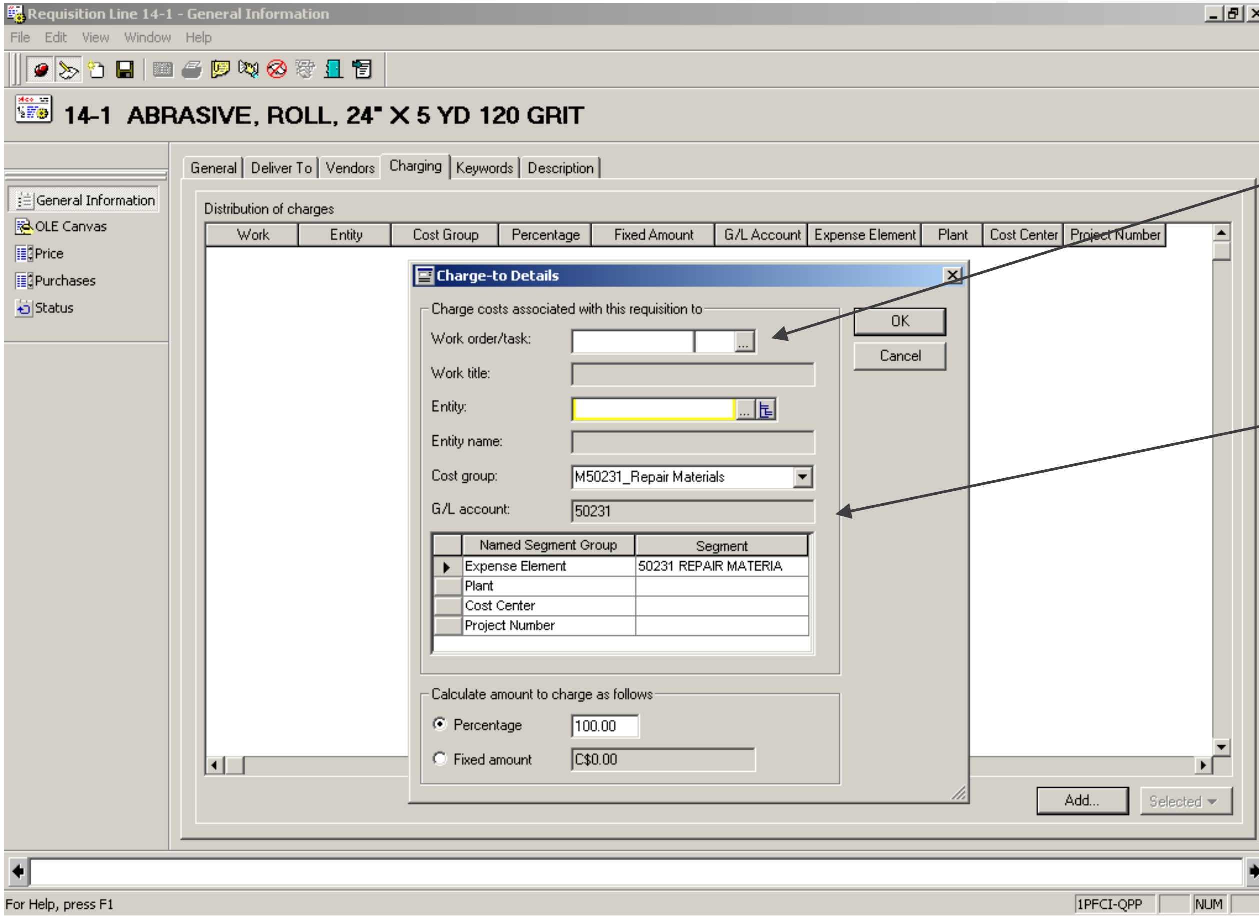
Note : do not enter a cost on this tab if catalog item found

Purchase Requisition – Deliver To tab



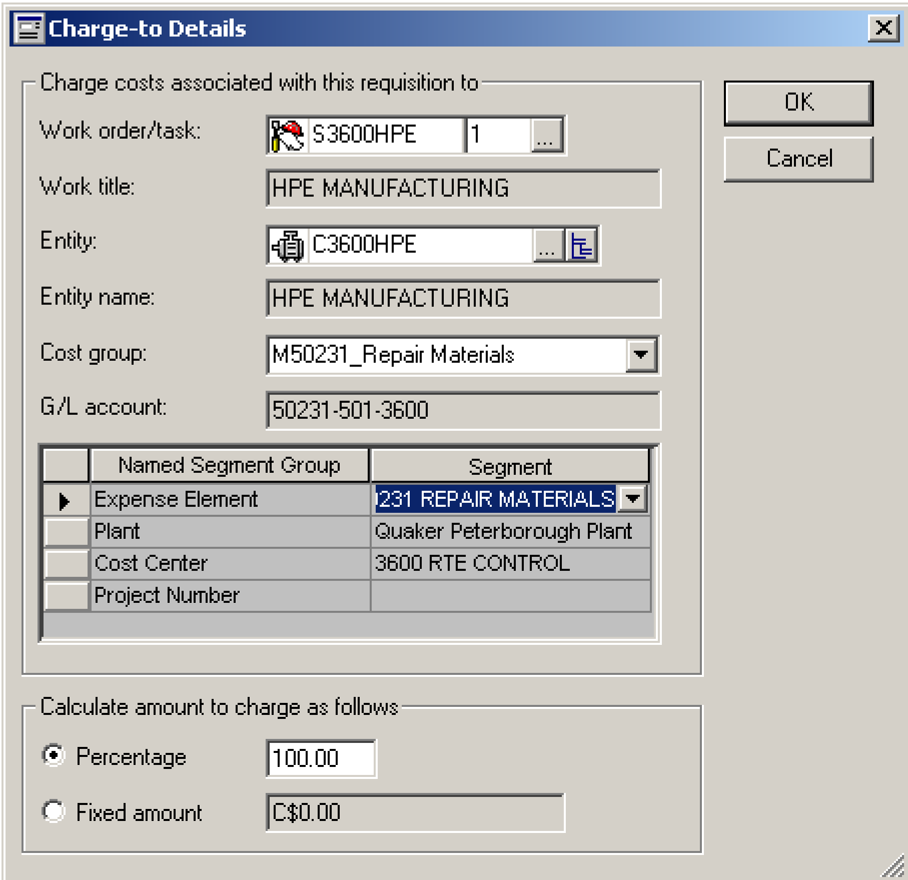
- Enter “SSB-PPD” in the deliver to field
- Change the person to notify if different from the requester.

Purchase Requisition – Charging tab



- 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



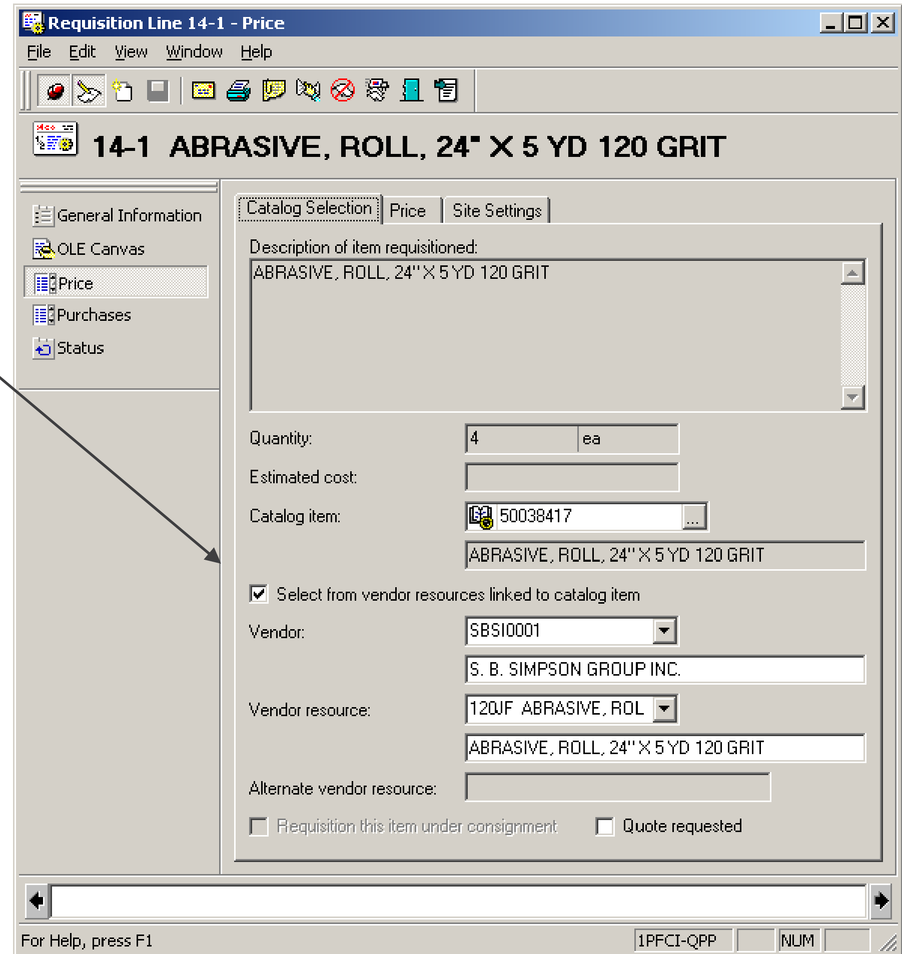
The fields will now be populated and the G/L account number will appear.

Click OK to return to the Requisition Line.

Purchase Requisition – Price View

To add price and vendor information:

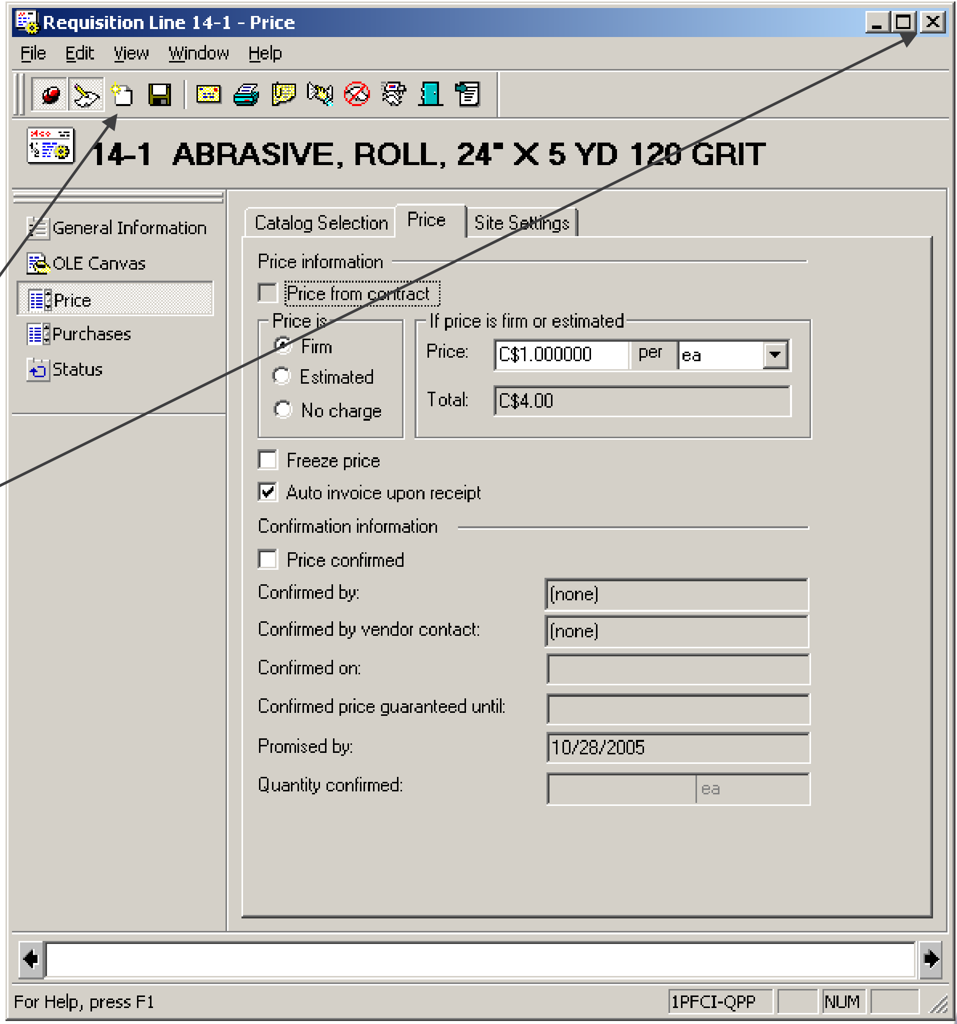
- Add or change vendor by unchecking the Select vendor box.
- Add or change the price by selecting the Price tab.



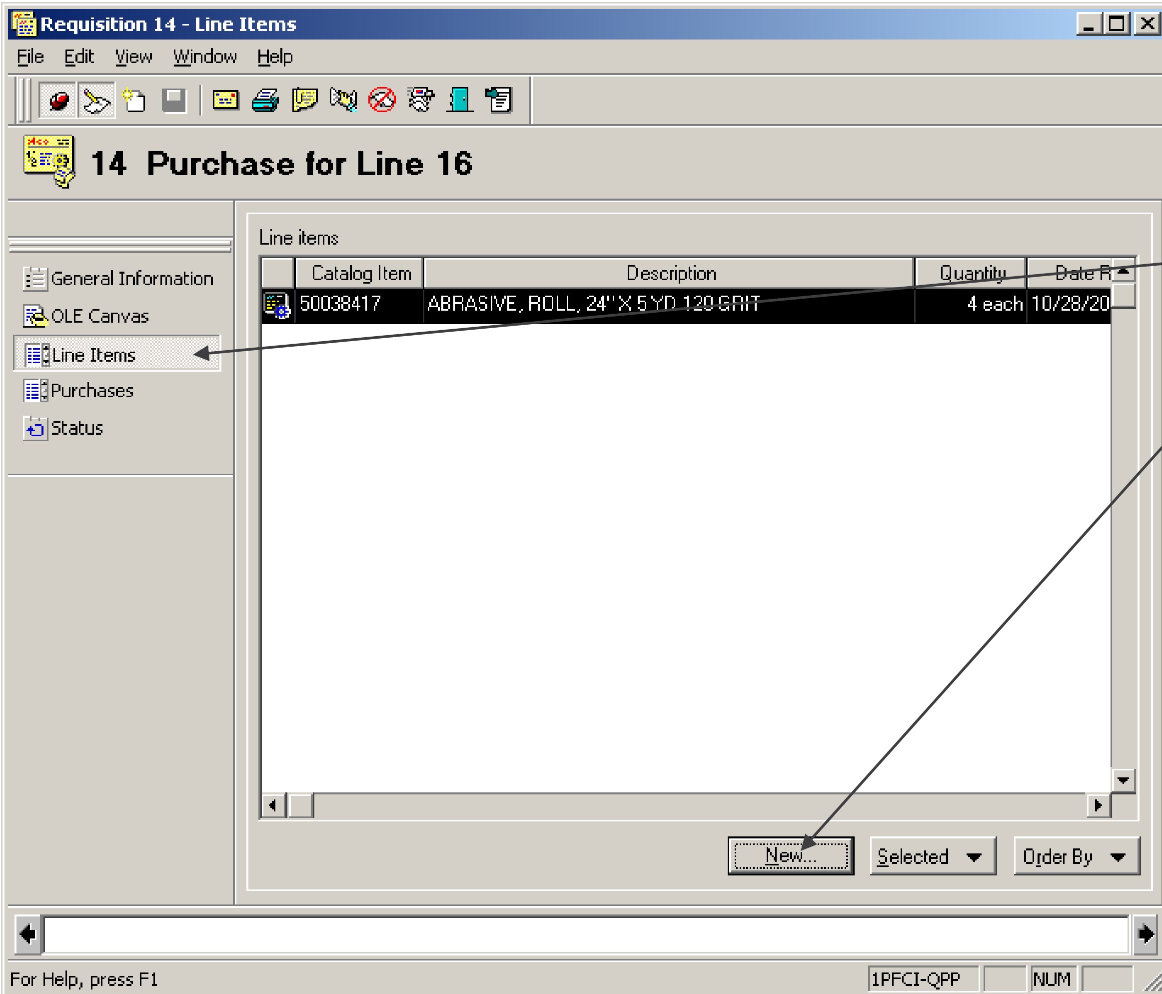
Purchase Requisition – Edit Price

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.



Purchase Requisition



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