Create Requisitions

The first step in the process of purchasing an item in the TEAMS system is to create a requisition for it. Once a requisition is created and submitted, it must move through the workflow. (For more information about the entire requisitions process, see the *TEAMS Requisitions User Guide*.) This document describes how to create four types of requisitions.

In this document

Creating Requisitions 2

How to Create a Traditional Requisition 2

How to Create a Not-To-Exceed Requisition 12

How to Create a Project Requisition 14

How to Create a Blanket Requisition 17

Creating Requisitions

This document covers how to create the following types of requisitions:

- Traditional Requisitions (below)
- Not-To-Exceed Requisitions (page 12)
- Project Requisitions (page 14)
- Blanket Requisitions (page 17)

How to Create a Traditional Requisition

1. Navigate to the TEAMS Home page and locate the Requisition menu.

   Note: *The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.*

2. Select the **Create Requisitions** link. The Select Requisition Type tab is displayed, as shown in the following illustration.

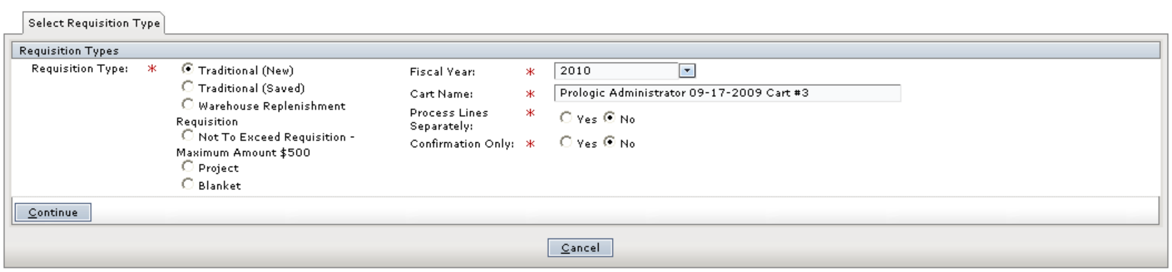

Figure 1: Select Requisition Type tab

3. In the **Requisition Type** field, Traditional (New) is the default selection. Leave Traditional (New) selected.

   Note: *Select* ***Traditional (Saved)*** *if you have already created the requisition and saved it as incomplete in the Line Items tab, and select the saved requisition from the* ***Cart Name*** *drop-down list.*

4. The **Fiscal Year** defaults to the current year, but you can change this, if necessary.

5. In the **Cart Name** field, the following information is defaulted in:

   - The employee's name who is logged in
   - Today's date
   - The next cart number

   You can change this information, if necessary.

   Note: *Cart Names are stored in numbered increments. If you change the Cart Name, the next requisition will default in using the same number as the number you change. For instance, if you change the Cart Name from Andrew 07-29-2008 Cart #4 to Office Chairs, the next requisition you create will default in the same Cart Number you changed: Andrew 07-29-2008 Cart #4.*

6. Because the line items you add to the requisition can be approved individually, one item may be approved but not the other, or one item may be approved before the other. Use the **Process Lines Separately** field to indicate whether the items you add to the requisition must be purchased together. Select Yes if one item may be purchased without the other(s). Otherwise, select No.
7. Use the **Confirmation Only** field to indicate whether you are creating this requisition only to confirm it. For instance, select Yes if you already have the merchandise and only need to confirm the order. (No is the system default.)
8. Click the **Continue** Button. The Create Requisition tab is displayed, as in the following illustration.

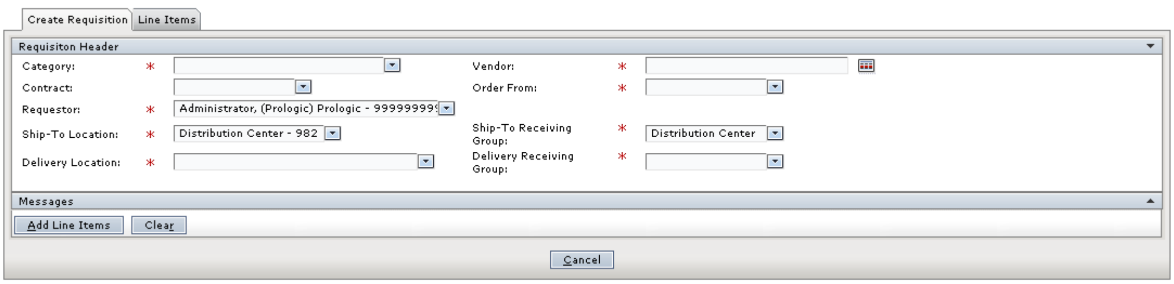

Figure 2: Create Requisition tab

9. The **Category** and **Vendor** fields are related. You have the following options:
   - **Select a Category first:** If you enter a category first, the vendor drop-down list is populated with those vendors that are assigned to the category you selected.
   - **Select a Vendor first:** If you enter a vendor first, the category drop-down list is populated with those categories that are assigned to the vendor you selected.

   Note: *The **Contract** and **Requestor** drop-down lists are populated with preferred contracts and requestors, respectively.*
10. Select a **Contract** from the drop-down list.
11. Select the **Order From** from the drop-down list.
12. The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

    Note: *The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.*

    Note: *Requestors you support are defined in the Maintain Requisition Support Hierarchy function. You can also view who you support and who supports you using the View My Requisition Support function. For more information about these functions, see the TEAMS Requisition Setup Guide.*
13. Select the **Ship-To Location** from the drop-down list.

    Note: *Depending on your selection, the Ship-To Receiving Group field is populated, and the Delivery Location and Delivery Receiving Group fields are displayed and populated on the tab. Select items from these drop-down lists.*
14. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.

15. Select the **Delivery Location** from the drop-down list.
16. Select the **Delivery Receiving Group** from the drop-down list.
17. Click the on the Messages panel to add messages to the requisition. The expanded Messages panel is displayed in the following illustration.

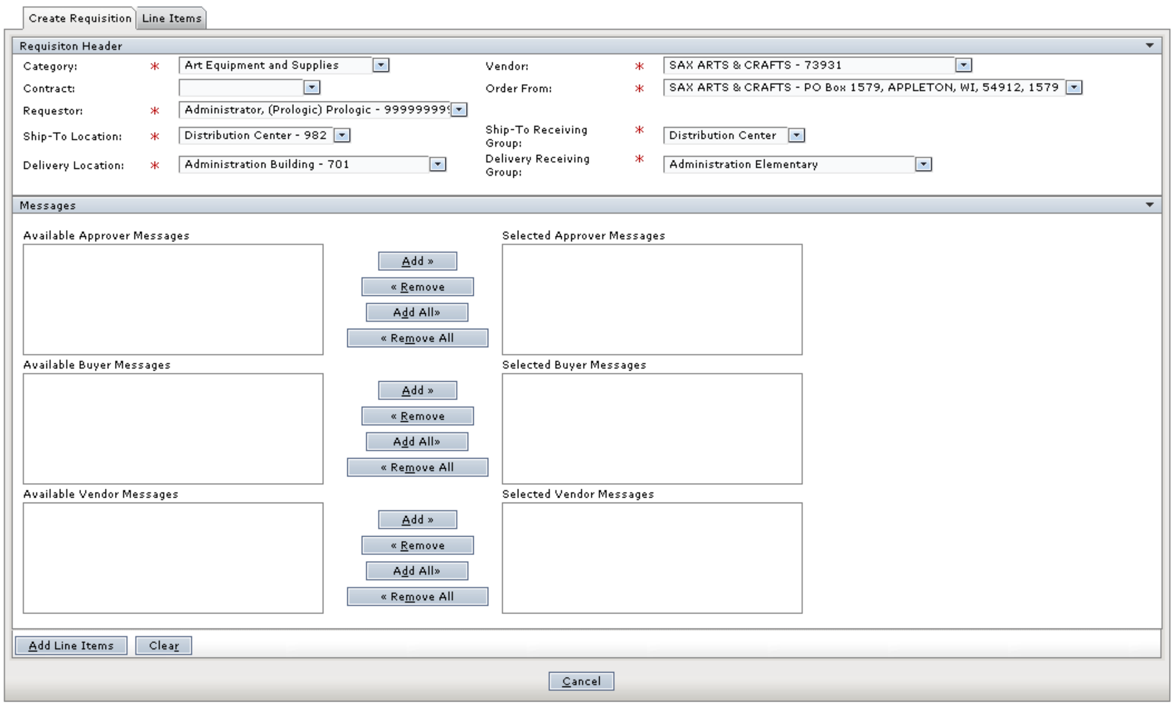

Figure 3: Create Requisition tab – Messages panel expanded

18. To include a message to Approvers, Buyers, or Vendors, highlight to select the appropriate message in the respective field and click the **Add** button.

    Tip: *Use the **Add All** button to move all of the items in one of the Available fields to its corresponding Selected field.*

    Note: *Available messages are created in the Requisition Options function. For more information, see the TEAMS Requisition Setup Guide.*

19. Click the **Add Line Items** button. The Line Items tab is displayed, as in the following illustration.

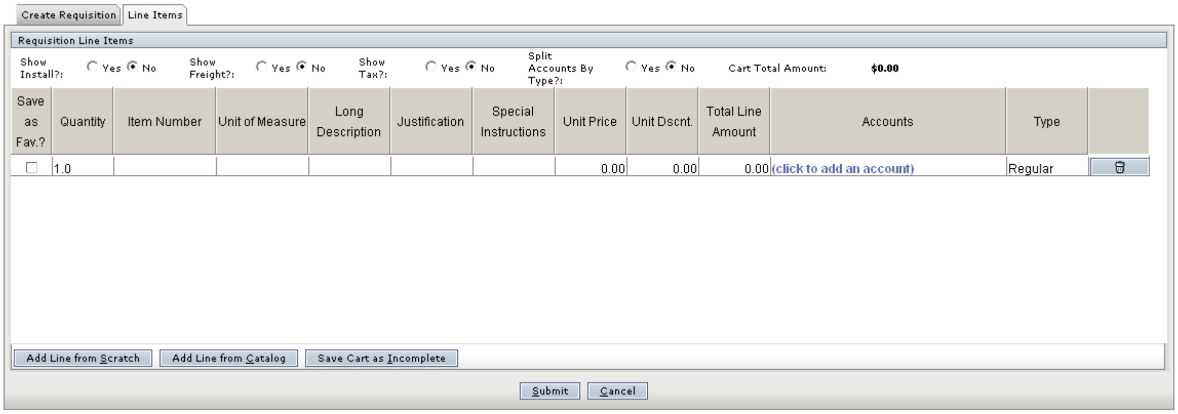

Figure 4: Line Items tab

Tip: *Use the Add Line from Catalog button to add a line item from the catalog, from a list of items you have saved as a favorited item, or from a list of items you have added in the past. For more information about how to add these items, see "How to Add a Line from the Catalog" on page 7.*

20. In the **Show Install?** field, indicate whether the item needs to be installed. If you select Yes, the Unit Install column is added to the table displaying the line items. Enter the amount the installation will cost in that cell of the appropriate line item.

21. In the **Show Freight?** field, indicate whether freight charges will be applied to the item. If you select Yes, the Freight column is added to the table displaying the line items. Enter the amount in that cell of the appropriate line item.

22. In the **Show Tax?** field, indicate whether taxes will be applied to the item. If you select Yes, the Unit Tax column is added to the table displaying the line items. Enter the amount the tax amount in that cell of the appropriate line item.

23. In the **Split Accounts By Type?** field, indicate whether the unit price, discount, or tax amounts need to be taken out of another account. If you select Yes, the Expense Accounts, Discount Accounts, and Tax Accounts columns are added to the table displaying the line items. Enter the amounts for each and add the account out of which to draw the funds.

    Note: *For more information about how to add an account, see step 25.*

24. Use the information in the table below to configure the table in the Line Items tab.

    Note: *Click inside the cells under the relevant columns to enter information. The Total Line Amount cell cannot be edited, but is altered by what you enter in the Unit Price and Unit Discount fields, as well as the Install, Freight, and Unit Tax columns, if they are selected.*

Column	Action
Save As Fav?	Checkmark the box in this column to save that line item as a favorite. The line item is added to the My Favorites tab when you click the Submit button. ***Tip:*** *When you need to add that item later, click the Add Line From Catalog button to access the Favorited Items tab. For more information about how to add favorited items, see "How to Add Items from the My Favorites tab" on page 8.*
Quantity	Enter the number of items you want to purchase.
Item Number	Enter the item's number. ***Note:*** *Entering an item number that matches the item number used in the catalog populates all of the information for the line item except for the account. For more information about how to add an account, see step 25.*
Unit of Measure	Select how the items are grouped from the drop-down list.
Long Description	Enter a long description.
Justification	Enter an explanation for the purchase.
Special Instructions	Enter any special instructions.
Unit Price	Enter a price per unit.
Unit Dscnt.	Enter a unit discount.

25. Click the **(Click to add an account)** hyperlink to include an account from which to draw funds to pay for the item. The Edit Accounts box is displayed, as shown in the following illustration.

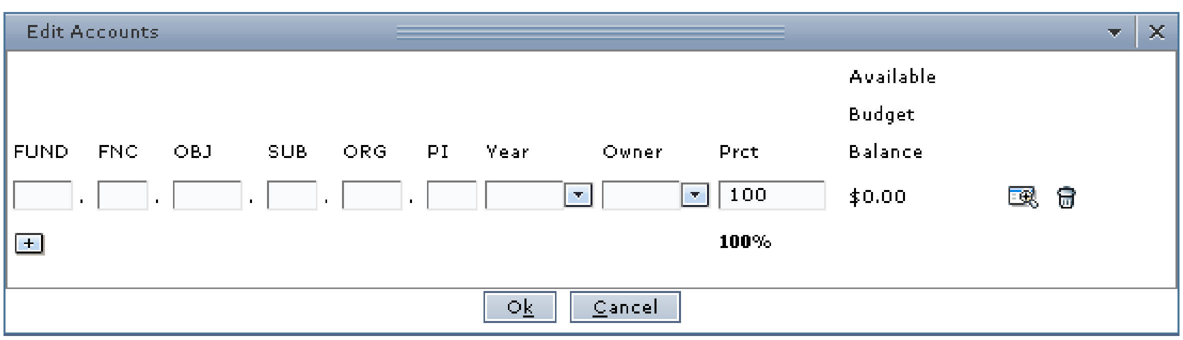

Figure 5: Edit Accounts box

26. Enter the account number, or click the icon to select one from the Account Numbers tab.

Tip: ***Complete any of the boxes and click the icon to filter the search.***

27. Select the **Year** from the drop-down list.
28. Select the **Owner** from the drop-down list.
29. The Percent (**Prct**) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.

    Note: *To delete an account, click the icon.*

30. **Optional.** Click the + icon to add another account number for the requisition. Repeat steps 25 through 29, and ensure that the Percentage fields for all accounts equals 100.
31. Click the **Ok** button. The account is added into the Accounts column in the Line Items tab.
32. Use the following information to add line items:
    - Use the **Add Line from Scratch** button to add a new, blank line item.
    - Use the **Add Line from Catalog** button to add a line with previously defined information.

    Note: *Clicking the Add Line from Catalog button opens the Purchasing Catalog tabs, which you can use to select catalog items, items you have saved as a favorite, and items you have added before. For more information about how to select these items, see "How to Add a Line Item from the Catalog" below.*

    Note: *Click the* ***Save Cart as Incomplete*** *button to save the requisition and complete it at another time. When you want to continue creating the requisition, select Traditional (Saved) from the Select Requisition type tab, and choose the requisition you created and saved from the drop-down list.*

33. Click the **Submit** button. A message is displayed which tells you that the requisition was successfully created, and asks if you would like to create another requisition.

How to Add a Line from the Catalog

If the item you want to add can be found in the catalog, instead of manually entering the line item, you can save time by adding line items that have already been saved in the catalog.

1. On the Line Items tab, click the **Add Line from Catalog** button. The Purchasing Catalog tab is displayed, as in the following illustration.

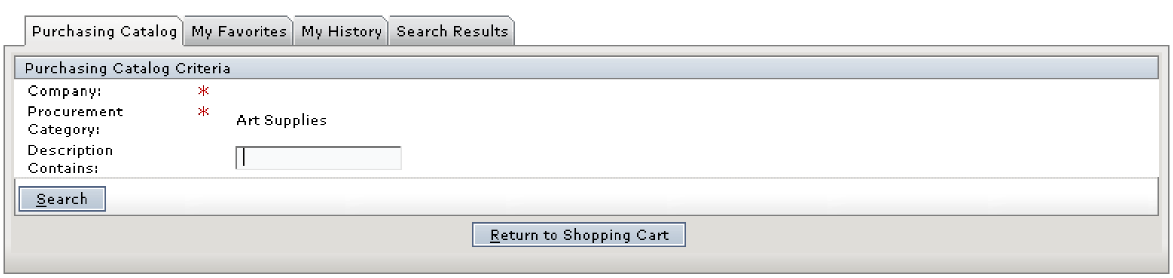

Figure 6: Purchasing Catalog tab

2. Enter information in the **Description Contains** field to search for items with a particular description.

3. Click the **Search** button. The Search Results tab is displayed, as in the following illustration.

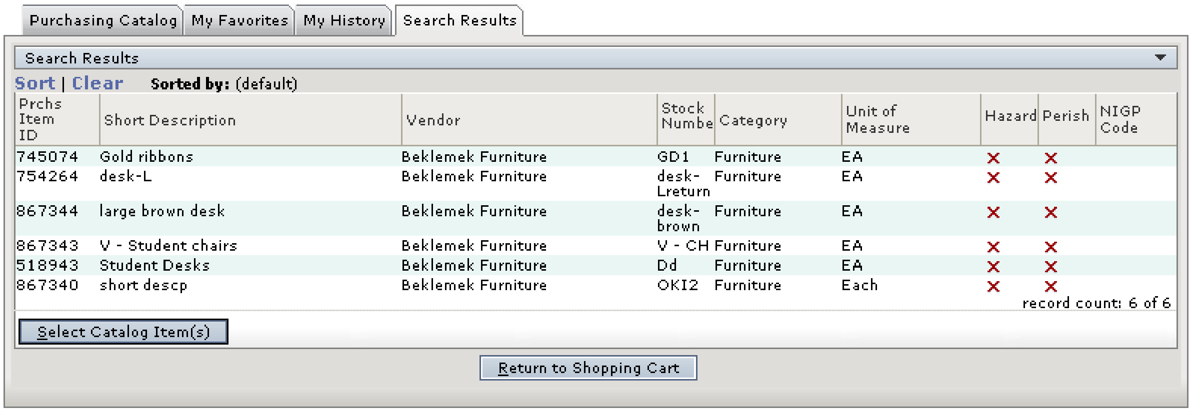

Figure 7: Search Results tab displaying results from a purchasing catalog search

4. Highlight to select the appropriate item, and click the **Select Catalog Item(s)** button. The Line Items tab is displayed with the item you selected added to the list.

How to Add Items from the My Favorites tab

When line items were originally entered, users have the option of saving it as a favorite by selecting the Save as Fav? field. Use the procedure below to select the items that have been saved as favorites.

1. Click the **My Favorites** tab to bring it forward. The My Favorites tab is shown in the following illustration.

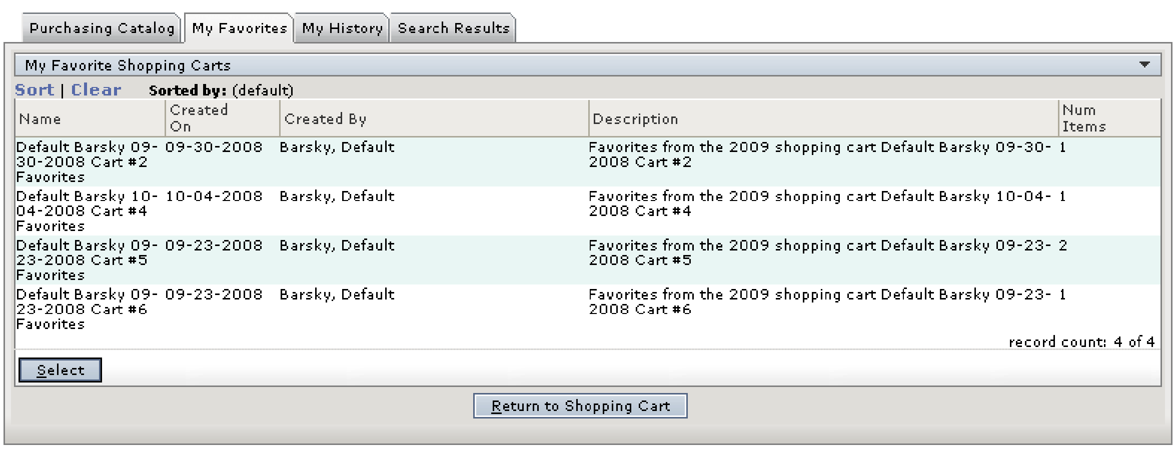

Figure 8: My Favorites tab

2. Highlight to select the item from the My Favorite Shopping Carts list, and click the **Select** button. The Search Results tab is displayed, as in the following illustration.

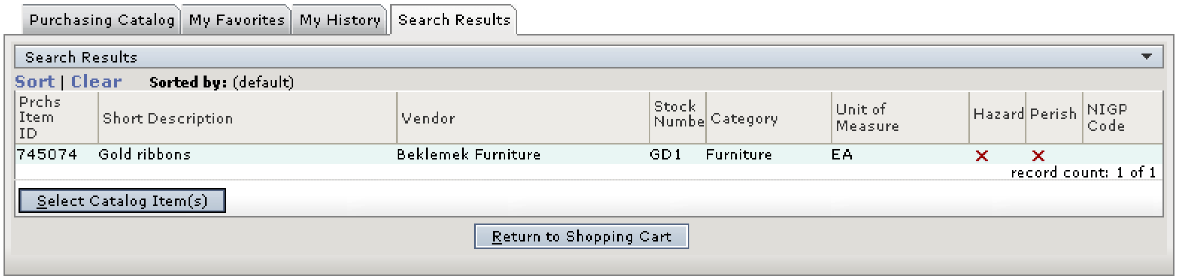

Figure 9: Search Results tab showing results for a favorited items search

3. Highlight to select the appropriate item, and click the **Select Catalog Item(s)** button. The Line Items tab is displayed with the item you selected added to the list.

How to Add Items from the My History tab

Use the following procedure to search for and select items that have been added before.

1. Click the **My History** tab to bring it forward. The My History tab is shown in the following illustration.

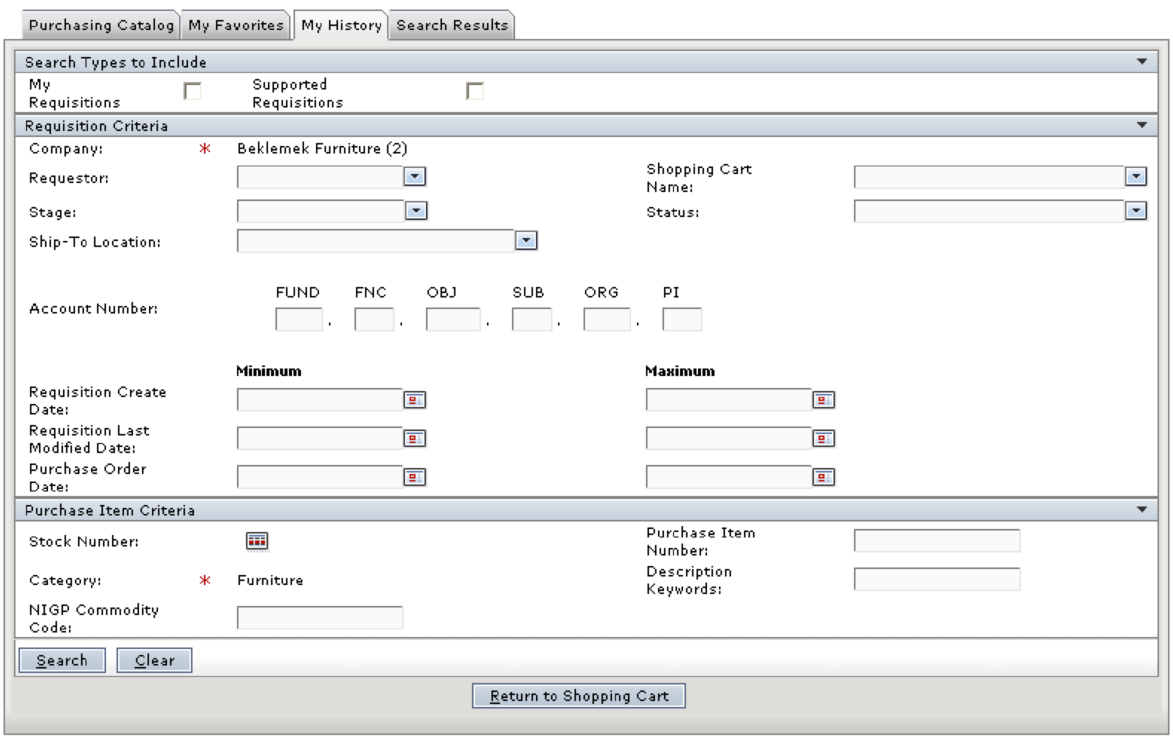

Figure 10: My History tab

2. In the Search Types to Include panel, select at least one of the following options:
   - **My Requisitions:** Select to search for requisitions that you created.
   - **Supported Requisitions:** Select to search for requisitions that were created for you by someone who supports you.
3. In the Requisition Criteria panel, enter information into at least one of the following fields:

Field	Action
Requestor	Select an item from the drop-down list.
Shopping Cart Name	Select the name of the shopping cart that was used for the requisition from the drop-down list.
Requisition Create Date (Minimum column)	Under the **Minimum** column, enter a date on or after which the requisition(s) for which you are searching were created, or click the icon to select a date from the calendar. ***Note:*** *Enter a date in the* ***Maximum*** *column to search for requisitions that were created within a timeframe.*
Stock Number	Click the icon to select a Stock Number from the Lookup Stock Number tab. ***Note:*** *In order to search for a stock number, you must first select a vendor. For more information about the Lookup Stock Number tab, see the Requisitions User Guide.*

4. To narrow your search results, enter information into any of the following fields:

Field	Action
Stage	Select the stage of the requisition for which you are searching from the drop-down list.
Status	Select the status of the requisition for which you are searching from the drop-down list.
Ship-To Location	Select the location where the items on the requisition were or are being shipped from the drop-down list.
Account Number	Enter the account number that was used to pay for the requisition for which you are searching.
Requisition Create Date (Maximum column)	Enter the date on or after which the requisition was created, or click the icon to select a date from the calendar. ***Note:*** *If you entered a date in the* ***Minimum*** *column, you can search for a requisition that was created within a timeframe by entering a date in this field.*
Requisition Last Modified Date	Enter a date on or after which the requisition was last modified, or click the icon to select a date from the calendar. ***Note:*** *Enter a date in the* ***Maximum*** *column to search for a requisition that was last modified within a timeframe.*
Purchase Order Date	Enter the purchase order date for the requisition for which you are searching, or click the icon to select a date from the calendar. ***Note:*** *Enter a date in the* ***Maximum*** *column to search for a requisition's purchase order date within a timeframe.*
Purchase Item Number	Enter the number of the item that is or was being requisitioned.
Description Keywords	Enter words that would match the description of the items on the requisition.
NIGP Commodity Code	Enter the NIGP Commodity code of the item of the requisition.

5. Click the **Search** button. The results of your search are displayed on the Search Results tab, as in the following illustration.

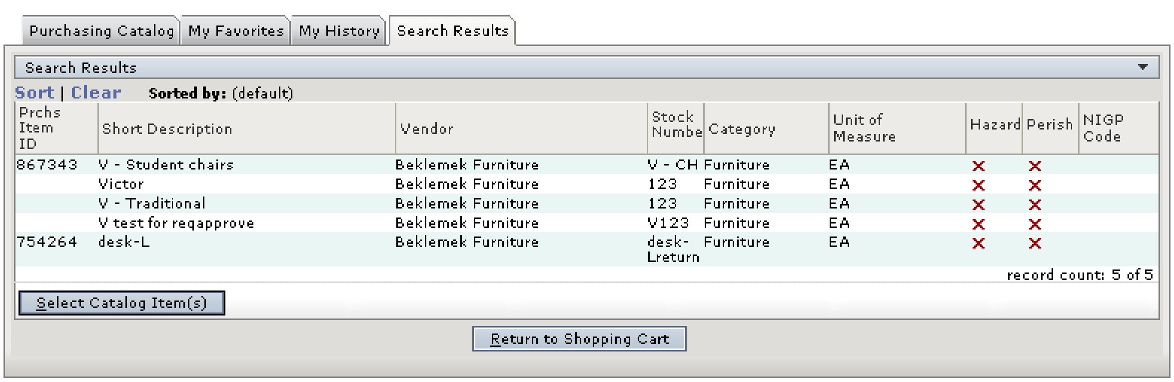

Figure 11: Search Results tab for items that have been ordered before

6. Highlight to select the appropriate item, and click the **Select Catalog Item(s)** button. The Line Items tab is displayed with the item you selected added to the list.

How to Create a Not-To-Exceed Requisition

1. Navigate to the TEAMS Home page and locate the Requisition menu.

   Note: *The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.*

2. Select the **Create Requisitions** link. The Select Requisition Type tab is displayed, as shown in the following illustration.

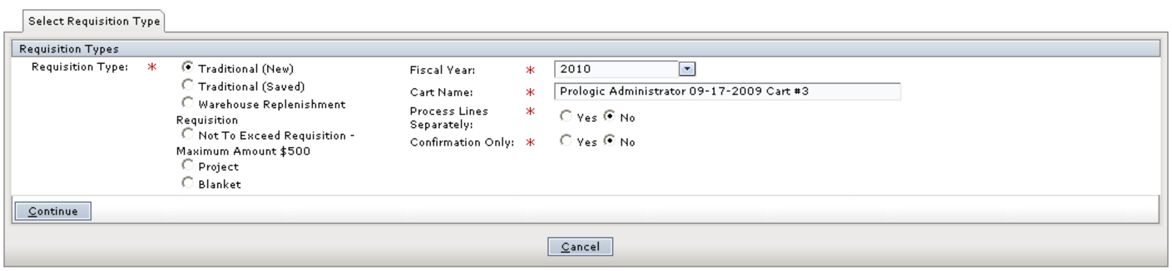

Figure 12: Select Requisition Type tab

3. In the **Requisition Type** field, select the Not-To-Exceed Requisition option. The tab is redisplayed.

   Note: *The maximum amount the requisition is not to exceed is determined by a business rule. Business rules are high-level maintenance functions that allow districts to control certain aspects of how TEAMS will operate.*

4. Select a **Fiscal Year** from the drop-down list.

5. Click the **Continue** button. The Not-To-Exceed Payment Authorization tab is displayed, as in the following illustration.

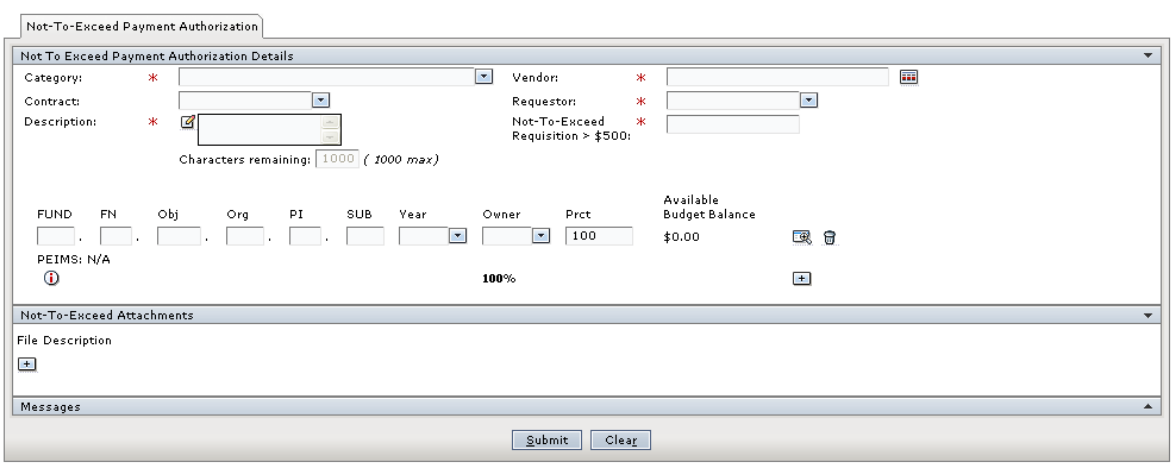

Figure 13: Not-To-Exceed Payment Authorization tab

6. The **Category** and **Vendor** fields are related. You have the following options:
   - **Select a Category first:** If you enter a category first, the vendor field is populated with those vendors that are assigned to the category you selected.
   - **Select a Vendor first:** If you enter a vendor first, the category field is populated with those categories that are assigned to the vendor you selected.

   ***Note:** The **Contract** and **Requestor** drop-down lists are populated with preferred contracts and requestors, respectively.*
7. Select a **Contract** from the drop-down list.
8. The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

   ***Note:** The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected..*

   ***Note:** Requestors you support are defined in the Maintain Requisition Support Hierarchy function. You can also view who you support and who supports you using the View My Requisition Support function. For more information about these functions, see the TEAMS Requisition Setup Guide.*
9. Enter a **Description**.
10. Enter an amount in the **Not-To-Exceed Requisition** field. The amount must not be more than the amount displayed in the field name.
11. Enter or edit the account number, or click the + icon to select another one from the Account Numbers tab.

    ***Tip:** Complete any of the boxes and click the icon to filter the search.*
12. Select the **Year** from the drop-down list.
13. Select the **Owner** from the drop-down list.
14. The Percent (**Prct**) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.
15. **Optional.** To add another account to the requisition, repeat steps 11 through 14, and ensure that the Percentage fields for all accounts equals 100.
16. Click the **Ok** button. The new account number is populated in the Account Number column.
17. In the Not-To-Exceed Attachments panel, click the + icon to add an attachment. The File and Description fields are displayed, as in the following illustration.

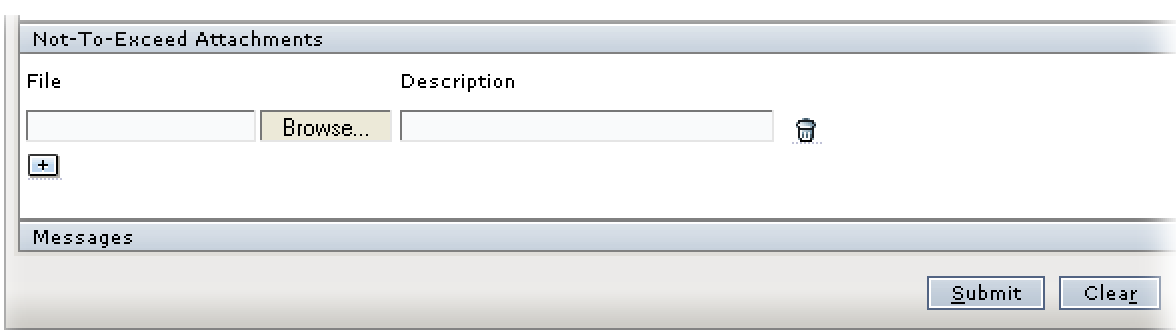

Figure 14: Not-To-Exceed Attachments panel with File and Description fields displayed

18. Click the **Browse** button to navigate to the file location.
19. Enter a **Description**.

    Note: *To add attachments, click the + icon again. To delete additional attachments, click the 🗑 icon.*

20. Click the **Submit** button. A message is displayed which tells you that the requisition was successfully created, and asks if you would like to create another requisition.

How to Create a Project Requisition

1. Navigate to the TEAMS Home page and locate the Requisition menu.

   Note: *The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.*

2. Select the **Create Requisitions** link. The Select Requisition Type tab is displayed, as shown in the following illustration.

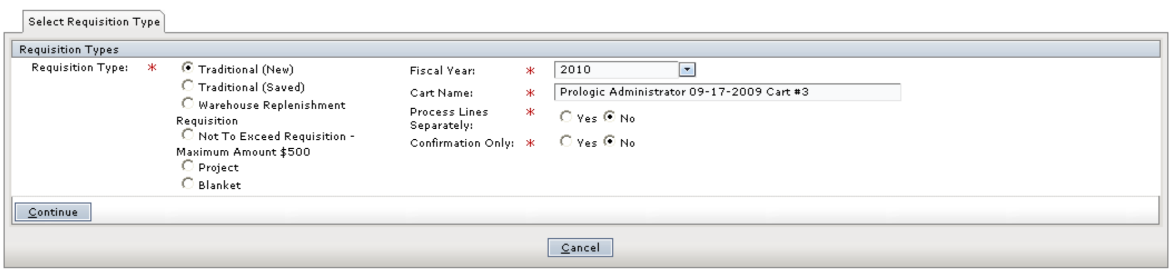

Figure 15: Select Requisition Type tab

3. In the **Requisition Type** field, select the `Project` option. The tab is redisplayed.
4. Select a **Fiscal Year** from the drop-down list.
5. Click the **Continue** button. The Create Project Requisition tab is displayed, as in the following illustration.

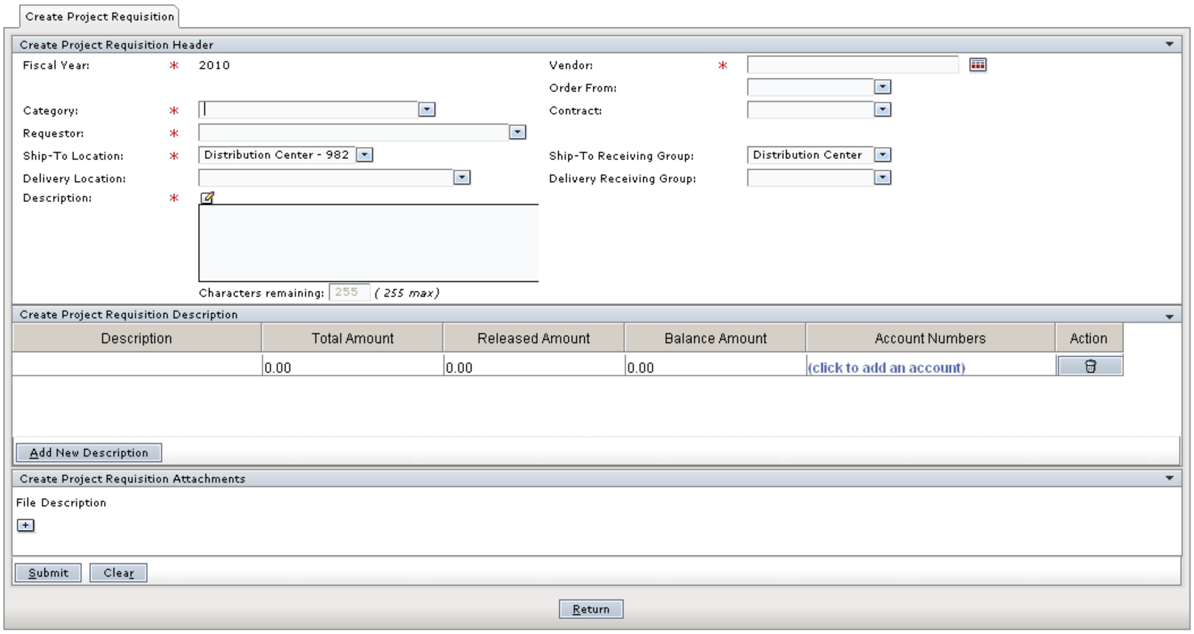

Figure 16: Create Project Requisition tab

6. The Category and Vendor fields are related. You have the following options:

   - **Select a Category first:** If you enter a category first, the vendor field is populated with those vendors that are assigned to the category you selected.
   - **Select a Vendor first:** If you enter a vendor first, the category field is populated with those categories that are assigned to the vendor you selected.

   Note: *The Contract and Requestor drop-down lists are populated with preferred contracts and vendors, respectively.*

7. Select a **Contract** from the drop-down list. The Category, Vendor, and Order From drop-down lists are populated with preferred Categories, Vendors, and Order From names, respectively.

   Note: *Preferred Vendors and Categories are defined in the Maintain Procurement Contracts function.*

8. The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

   Note: *The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.*

   Note: *Requestors you support are defined in the Maintain Requisition Support Hierarchy function. You can also view who you support and who supports you using the View My Requisition Support function. For more information about these functions, see the TEAMS Requisition Setup Guide.*

9. Select the **Ship-To Location** from the drop-down list.

   Note: *Depending on your selection, the Ship-To Receiving Group field is populated, and the Delivery Location and Delivery Receiving Group fields are displayed and populated on the tab.*

10. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
11. Select a **Delivery Location** from the drop-down list.
12. Select the **Delivery Receiving Group** from the drop-down list.
13. Enter a **Description**.
14. Click the **Add New Description** button. An empty row is displayed.
15. Click in the cell under the **Description** column to enter the name of the milestone.
16. Click in the cell under the **Total Amount** column to change the total amount.
17. Click on the **(click to add account)** hyperlink to enter the account number. The Edit Accounts box is displayed, as in the following illustration.

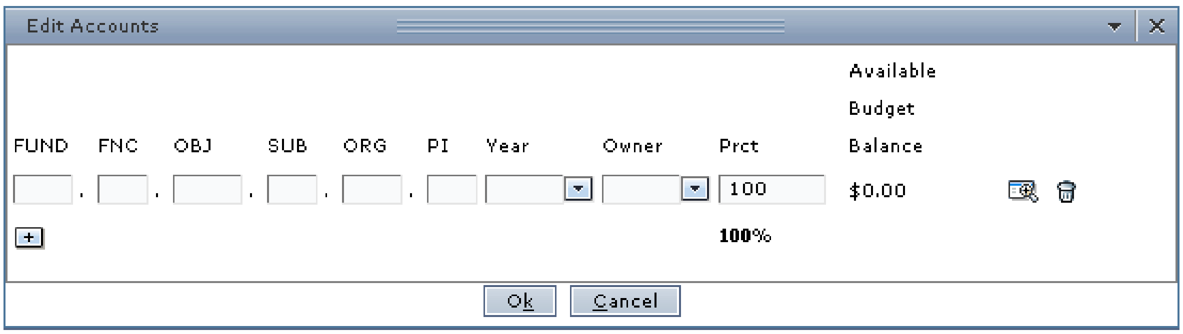

Figure 17: Edit Accounts box

18. Enter the account number, or click the + icon to select another one from the Account Numbers tab.

    Tip: *Complete any of the boxes and click the icon to filter the search.*

19. Select the **Year** from the drop-down list.
20. Select the **Owner** from the drop-down list.
21. The Percent (**Prct**) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.
22. **Optional.** Click the + icon to add another account number for the requisition. Repeat steps 17 through 21, and ensure that the Percentage fields for all accounts equals 100.
23. Use the **Action** column to delete a line item.
24. Click the **Ok** button. The new account number is populated in the Account Number column.
25. In the Create Project Requisition Attachments panel, click the + icon to add an attachment. The File and Description fields are displayed, as in the following illustration.

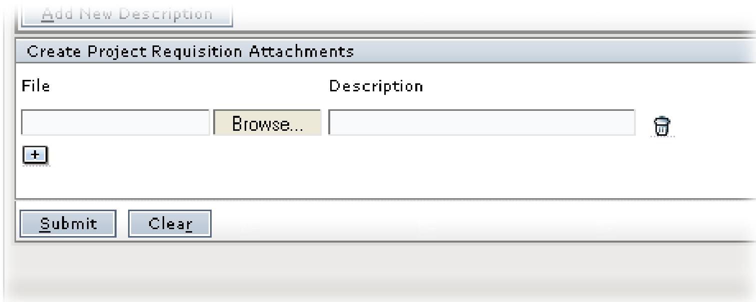

Figure 18: Create Project Requisition Attachments panel with Browse and Description fields displayed

26. Click the **Browse** button to navigate to the file location.
27. Enter a **Description**.

    Note: *To add attachments, click the + icon again. To delete additional attachments, click the icon.*

28. Click the **Submit** button. The Select Requisition Type tab is displayed with a message that the project requisition was successfully saved.

How to Create a Blanket Requisition

1. Navigate to the TEAMS Home page and locate the Requisition menu.

   Note: *The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.*

2. Select the **Create Requisitions** link. The Select Requisition Type tab is displayed, as shown in the following illustration.

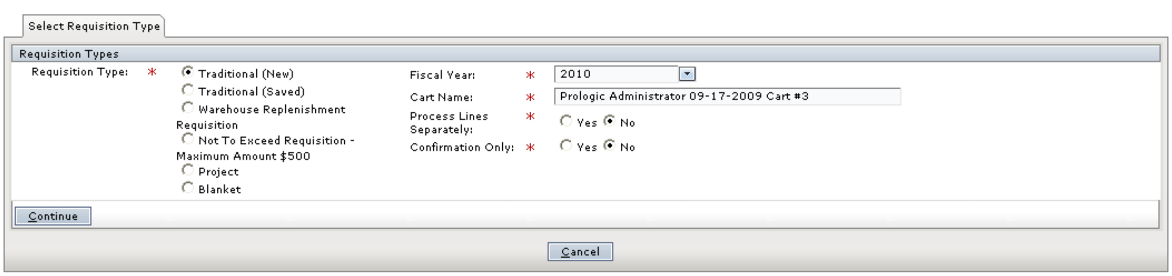

Figure 19: Select Requisition Type tab

3. In the **Requisition Type** field, select the `Blanket` option.
4. Select a **Fiscal Year** from the drop-down list.
5. Click the **Continue** button. The Blanket Requisition tab is displayed, as in the following illustration.

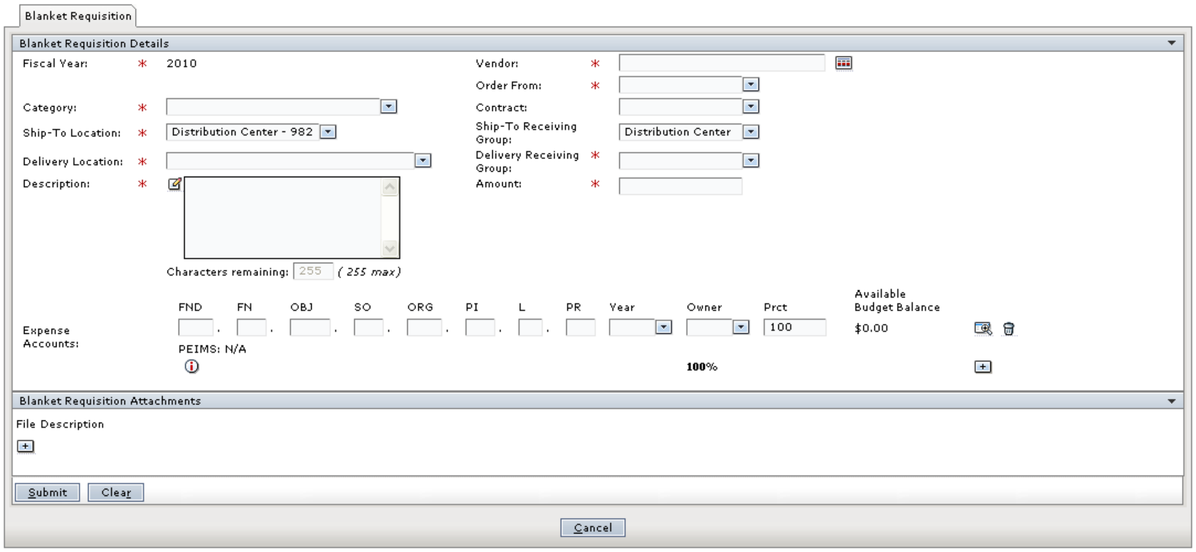

Figure 20: Blanket Requisition tab

6. The **Category** and **Vendor** fields are related. You have the following options:
   - **Select a Category first:** If you enter a category first, the vendor drop-down list is populated with those vendors that are assigned to the category you selected.
   - **Select a Vendor first:** If you enter a vendor first, the category drop-down list is populated with those categories that are assigned to the vendor you selected.

   Note: *The **Contract** and **Requestor** drop-down lists are populated with preferred contracts and requestors, respectively.*
7. Select the **Order From** from the drop-down list.
8. Select a **Contract** from the drop-down list.
9. Select the **Ship-To Location** from the drop-down list.

   Note: *Depending on your selection, the Ship-To Receiving Group field is populated, and the Delivery Location and Delivery Receiving Group fields are displayed and populated on the tab.*
10. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
11. Select a **Delivery Location** from the drop-down list.
12. Select a **Delivery Receiving Group** from the drop-down list.
13. Enter a **Description**.
14. Enter the **Amount**.
15. Edit the **Expense Account**, or click the icon to select another one from the Account Numbers tab.

    Tip: *Complete any of the boxes and click the icon to filter the search.*
16. Select the **Year** from the drop-down list.

17. Select the **Owner** from the drop-down list.
18. The Percent (**Prct**) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.
19. **Optional.** Click the + icon to add another account number for the requisition. Repeat steps 15 through 18, and ensure that the Percentage fields for all accounts equals 100.
20. Click the **Ok** button. The new account number is populated in the Account Number column.
21. In the Blanket Requisition Attachments panel, click the + icon to add an attachment. The File and Description fields are displayed, as in the following illustration.

Figure 21: Blanket Requisition Attachments panel with Browse and Description fields displayed

22. Click the **Browse** button to navigate to the file location.
23. Enter a **Description**.

    Note: *To add attachments, click the + icon again. To delete additional attachments, click the icon.*
24. Click the **Submit** button. A message is displayed which tells you that the requisition was successfully created, and asks if you would like to create another requisition.