Raising Requisitions

Navigate to Procurement → Requisitioning → Requisitions - advanced

Requisition Entry Tab

1. Read the information in the Message field. This explains the information required for different purchases based upon their value.

2. If information is entered in the Default supplier & contract and Default GL analysis sections the system will apply it to all of the requisitions rows. Enter a Supplier and Subproject code. This information can be changed as necessary.

3. Update the Delivery date field if the date is known or choose the next working day.

4. Choose the appropriate delivery address from the Delivery Details drop-down list. The Delivery address field will automatically update with the selected address.

5. Enter a delivery contact name in the Delivery for attention of field.

Requisition Details Tab

1. Click Add beneath the Requisition details table to create a new requisition row.

2. Enter the goods or services requested in the Product field and [Tab].

3. The Description field automatically updates. Amend the information to accurately describe the purchase. This information appears on the purchase order.

4. The Unit, Supplier, Delivery date and Currency fields contain default information, but can be changed if necessary.

5. Insert the Quantity of items or services being ordered.

6. Enter the Price of an individual item or service being ordered. The system updates the Amount field (Quantity x Price). This is always less VAT, which is handled by the Tax code entered in the GL Analysis area.

A requisition number is automatically assigned to a new requisition when it is saved. To view a previously saved requisition click Open in the tools ribbon. A value lookup window opens, click Search and find the relevant requisition.

READ THIS FIRST!
Unless purchased under consortia agreement (See Purchasing www.rhul.ac.uk/finance/purchasing/) the following will apply: Between £5k & £20k obtain 3 quotes; Between £20k & £50k obtain 3 written quotes; Over £50k obtain sealed tenders.
Raising Requisitions

Requisition Details Tab – Adding/Amending Rows

<table>
<thead>
<tr>
<th>Funds check</th>
<th>Product</th>
<th>Description</th>
<th>Unit</th>
<th>Supplier</th>
<th>Delivery date</th>
<th>Quantity</th>
<th>Currency</th>
<th>Price</th>
<th>Amount</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

To create a new requisition row click **Add**.

To delete a requisition row place a tick in the box at the beginning of appropriate row **1** and click **Delete**.

To copy a requisition row place a tick in the box at the beginning of the row you wish to copy **1** and click **Copy**.

Requisition Details Tab – Splitting Costs

To split the cost of a requisition row between two budgets use the split row function in the GL Analysis table.

1. Ensure the row for which you need to split the costs is active (highlighted in green) in the Requisition details table. The GL Analysis table will be white and have a single row. Click into the row to activate it.

2. Click the **Split row** button beneath the GL Analysis table. This creates a new row, shown in the screenshot above.

3. Amend the **Subproj** of the new row to indicate the additional budget which will fund the purchase.

4. Amend the **Percentage** or **Amount** field to indicate how much of the purchase each budget will fund. The system will calculate the other field. Create additional rows if required, ensuring that the total percentage of all of the rows adds up to 100%.

Saving the Requisition

When the requisition is complete click **Save** in the tools ribbon. If all of the mandatory fields have been completed and there are no errors the system will provide a successfully saved message containing a requisition number. The requisition will have entered workflow.

![The requisition is saved with requisition number 5080120](image)

It is sensible to make a note of the requisition number in case you need to track the progress of the requisition through workflow.

> Please see the e-Learning Requisition materials for more detailed information and additional functions.