How to Create a Purchasing Requisition

1. Call the vendor and ask for a price quote, *but* be sure the vendor knows that you are not placing the order at that time.

2. Login to Jenzabar EX.

3. Click on the Create Requisition Link.

   NOTE: This link can be found by expanding the Requisition Creation link in the Activity Center in the left hand window pane.

   NOTE: Use TAB key to exit fields throughout the entire form.

4. Fill in the following blanks in the Assign Profiles, Rules and Approval Tracks section:
   - Click on the blank attached to Approval Track.
     - Select REQ-Requisitions.
     - Click Assign.

5. Fill in the following blanks in the Requisition Profile sections:
   - Requisition Text: Briefly describe what you are purchasing.

6. Fill in the following blanks in the Set Purchasing Preferences section:
   - Purchasing Agent: Name of the Procurement Assistant (last name, first name).
   - Ship Goods Here: Central Stores
     - ***If you are ordering a service, enter INS.***

7. Fill in the following blanks in the Suggest a Vendor section:
   - Vendor

8. Fill in the following blanks in the Default Line Items With section:
   - Account Number
   - Project (If applicable)
   - Click assign

9. In the bottom section, fill in the following information:
   - Unit (usually “EACH”)
   - Quantity
   - Cost Per Unit
   - Description

     NOTE: If you need more space for the description, right-click in the Description box and click on Additional Item Description. If you need more space than the one line, right-click in the gray area and click Add Row. Once you are finished, click OK.

10. Uncheck the “OK To Group” box.

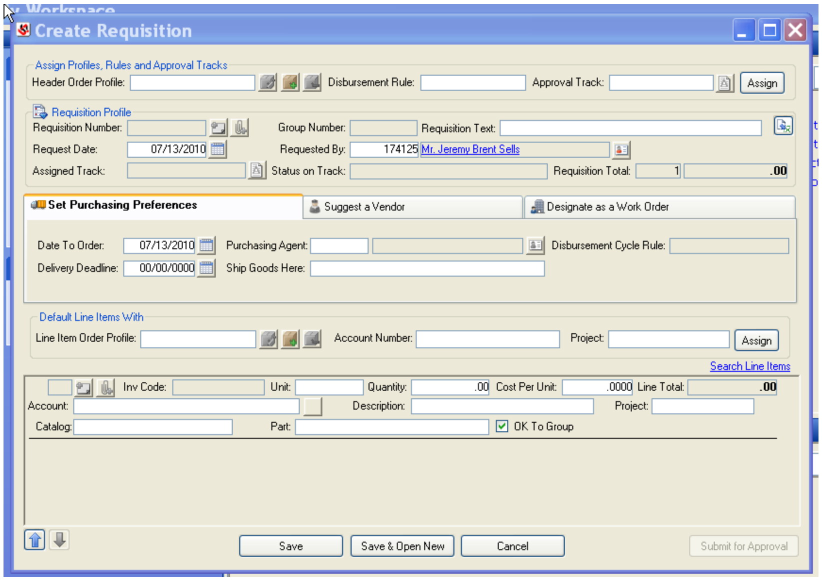
11. If you wish to order more than one item, right-click in the gray area at the bottom. Click Add Row, and enter the desired item using the same process as in Step 8. Click Save.

12. Attach the PDF copy of the quote provided to you by the vendor by clicking the second icon, a paper clip with a green plus sign, next to the Requisition Number.
13. Click Save.
14. Click the “Print the requisition” link in the top right corner.
15. Click Submit for Approval.

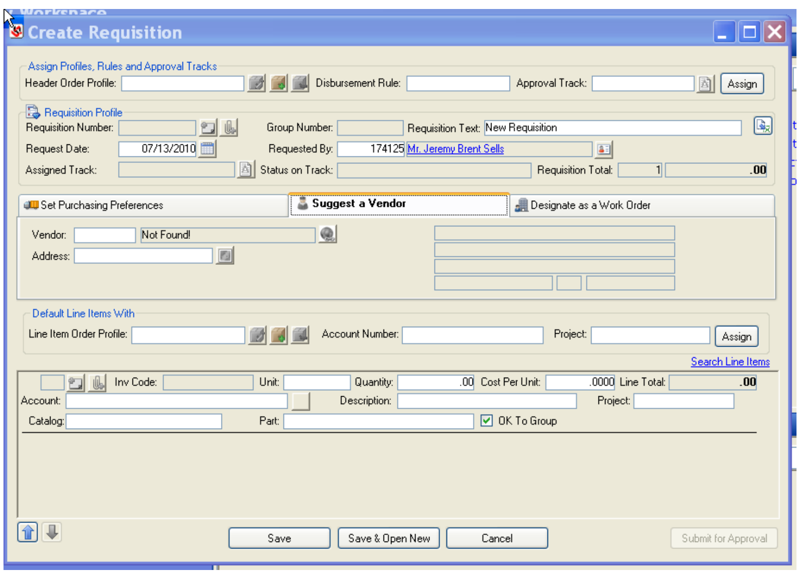
****For assistance, call the Procurement Office at ext. 4722. ****

Requisition Example

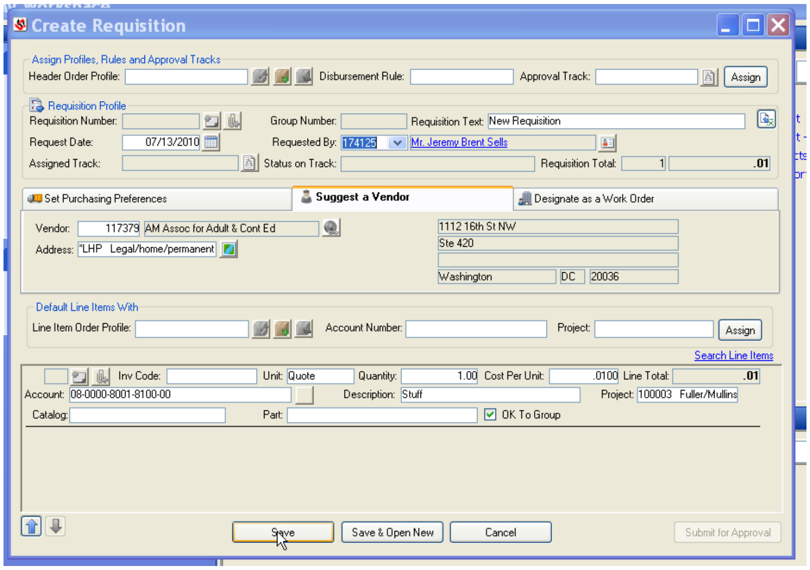
1. Open a new Requisition.



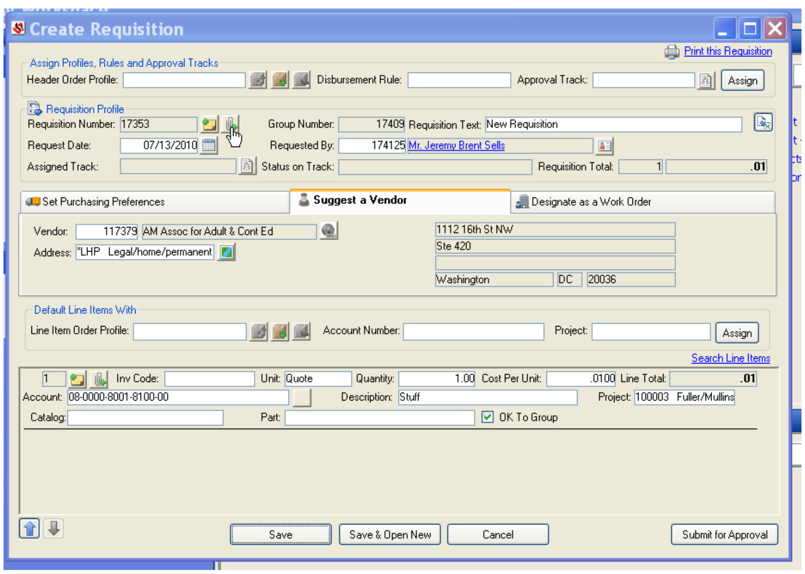
2. Provide the necessary information. (See above steps 1-11.)



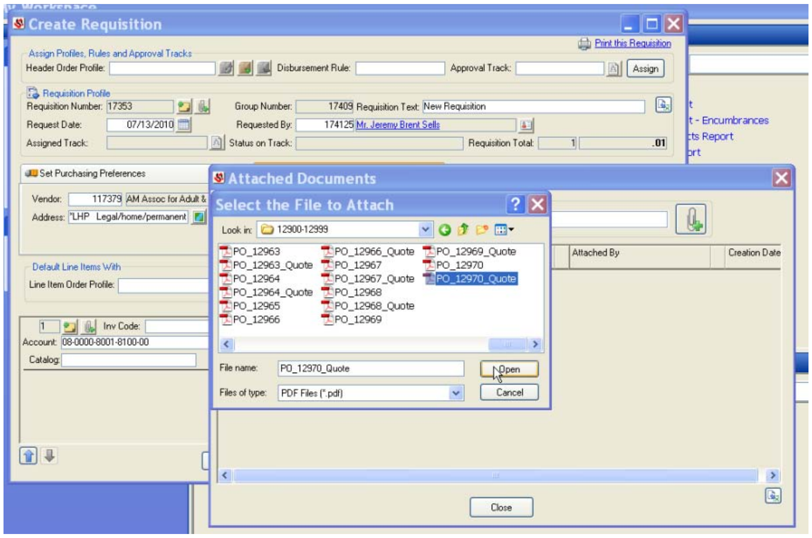
3. Click Save, but do **not** click Submit for Approval.



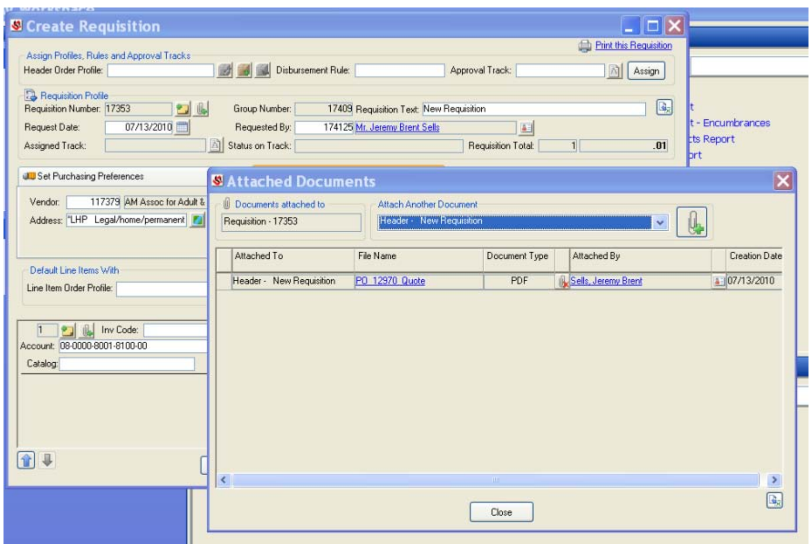
4. Click on the second icon next to the Requisition Number (Step 12).



5. Find the attachment on your computer that you have saved to a folder on the network. (You need to scan the quote prior to this step.)



6. The attached document should appear in the dialog box. Click Close.



7. Print the Requisition.
8. Click Submit for Approval and close.