CSU Requisitions – How To

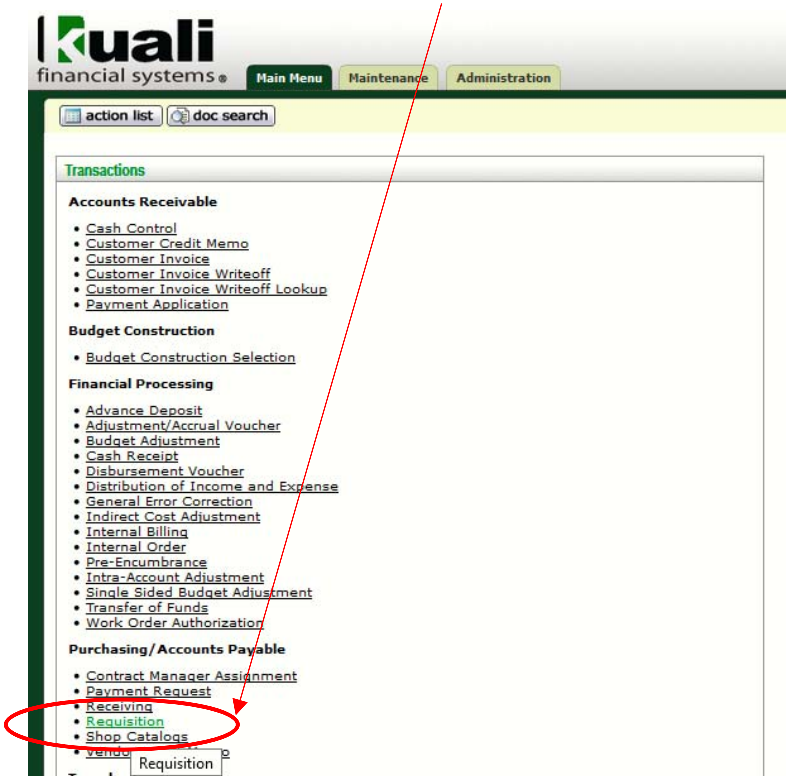
Requisitions are a request for a purchase order, and are REQUIRED for any purchases greater than $5000.00, AND for any purchase/service that requires a signed contract.

NOTE – You cannot break-up purchases into smaller invoices to avoid requesting a purchase order. These rules are in place to ensure that CSU is in compliance with purchasing rules that call for fair competition for vendors among other things. See the Before you buy page on the CSU procurement site for dollar thresholds for additional purchasing requirements:

- Purchase order amount thresholds
- Informal and Documented Quotes Requirements
- Invitation to Bid/Request for Proposal requirements

http://www.procurement.colostate.edu/procurement/procexpect.aspx

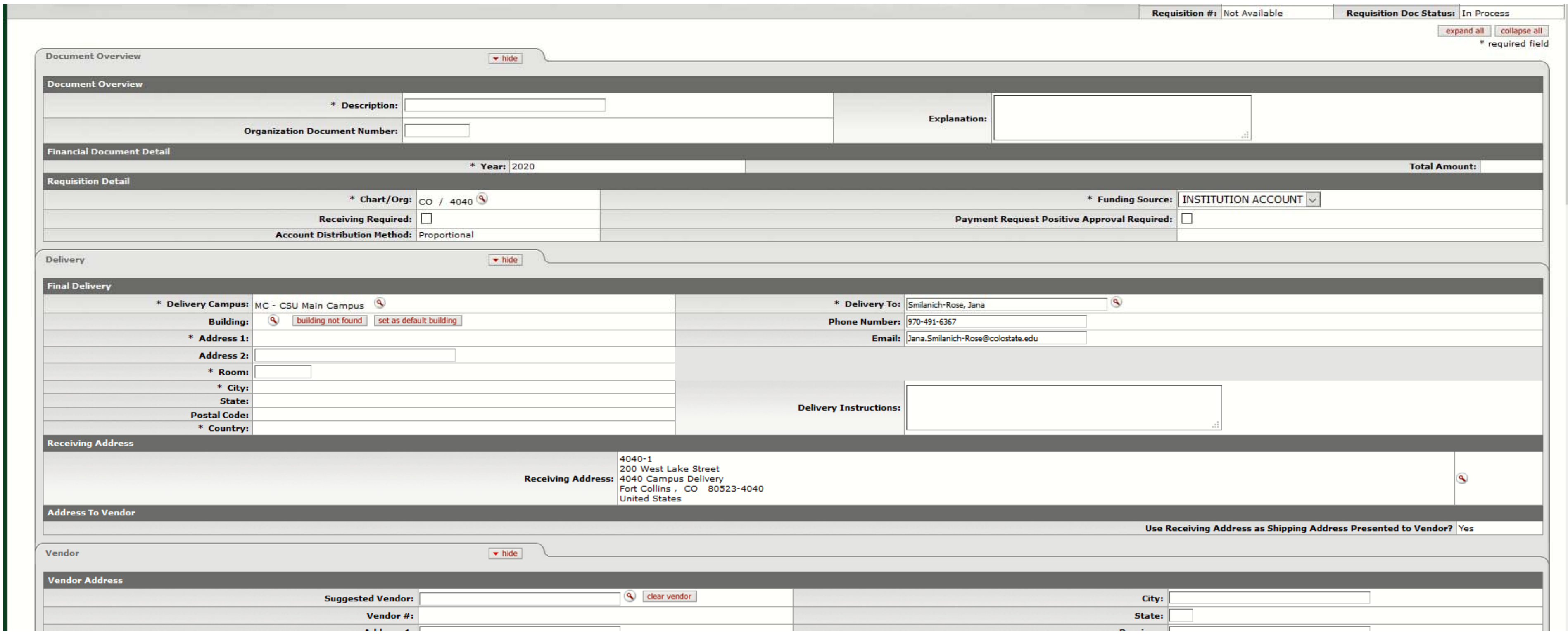
Select Requisition from the mail Kuali page



Document Overview:

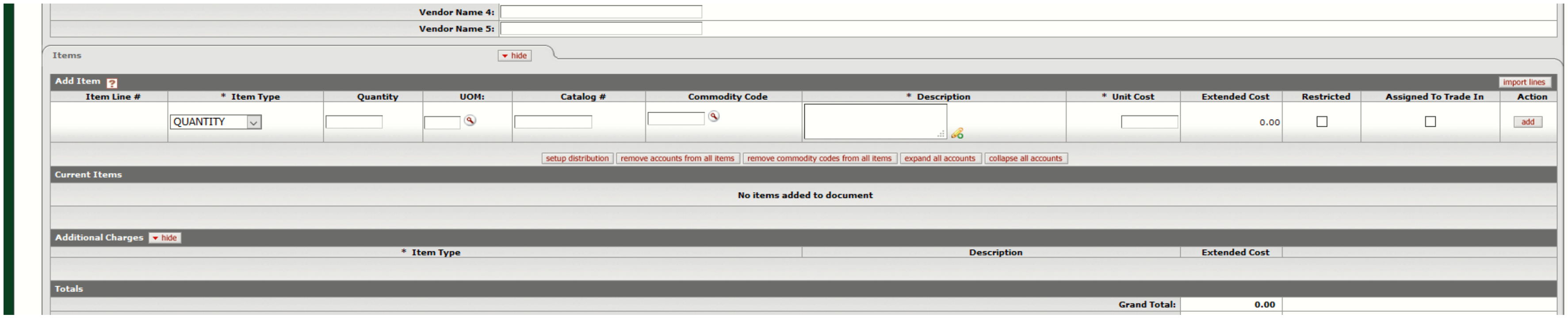
Complete the following fields:

- Description – short desc. Of purchase – limited to 40 characters including spaces
- Explanation – This is the Business Purpose for the purchase and allows much larger amounts of text.
    - *While not required, this is the field where you are explaining why this is an acceptable business purchase for your group to people who don't have knowledge of your specific program needs, so more information is better than less! And will help your transactions go through more quickly!!*
- Delivery Campus – Click on the magnifying glass next to building to find your location/address
- Suggested Vendor - Click on the magnifying glass – If your vendor is not in the system, contact the Fiscal Office to help get your vendor established.

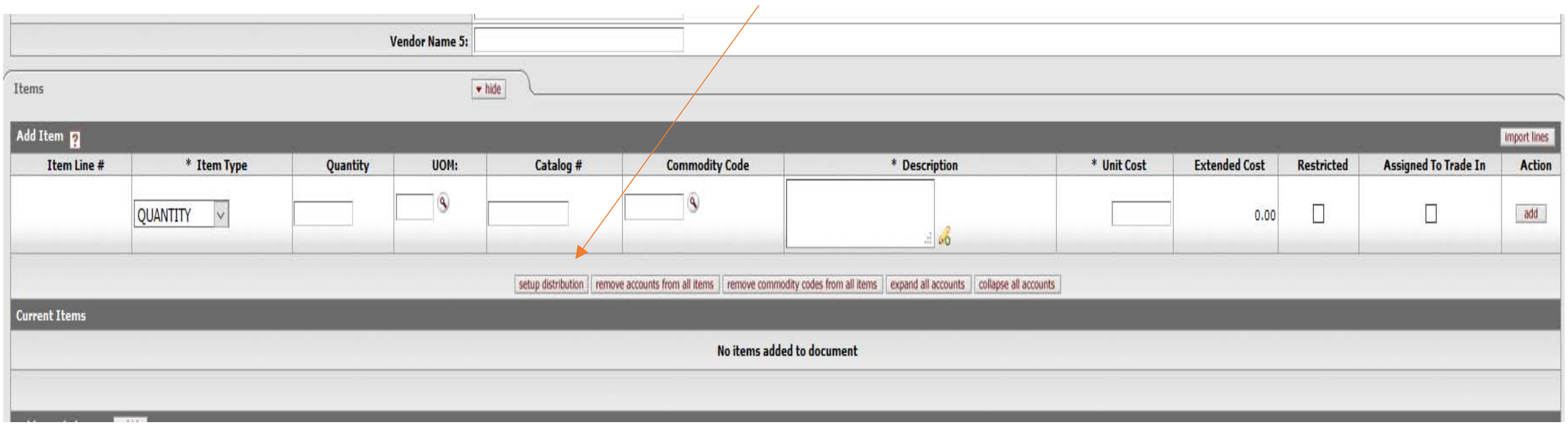


ITEMS: Add your items on the Items tab

- Item Type – Quantity or No Quantify (no quantity is used for example for lodging or catering)
- UOM (unit of measurement) – generally EA for each
- Description of productor or what you are purchasing
- Unit Cost - Click add.



- Finally, enter your account information by clicking on the **setup distribution** button. You will do this for each item you have entered.



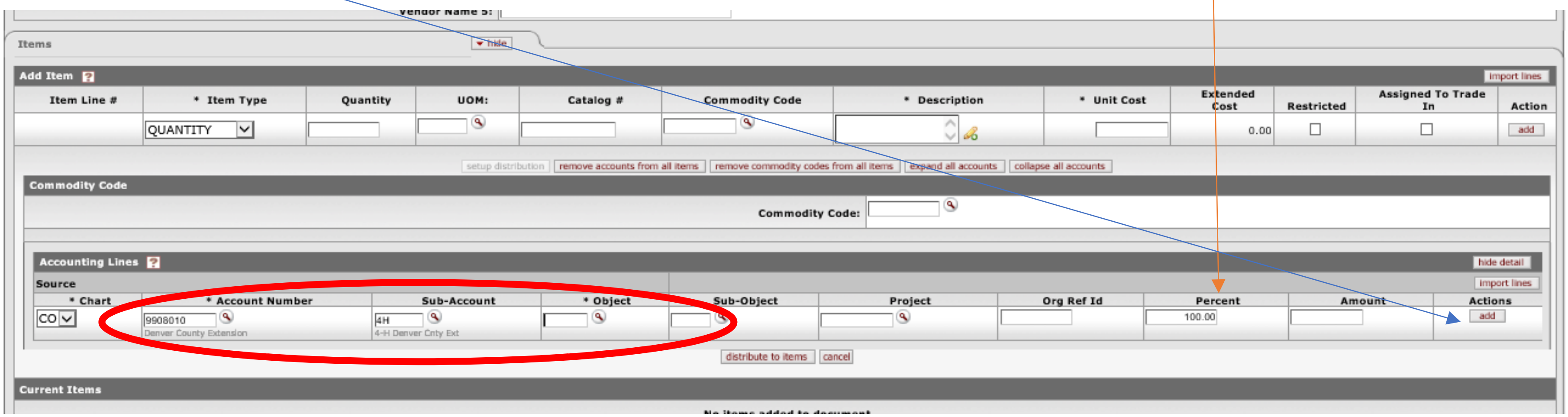
- Repeat process above for all items on the requisition.

Setup Distribution, continued:

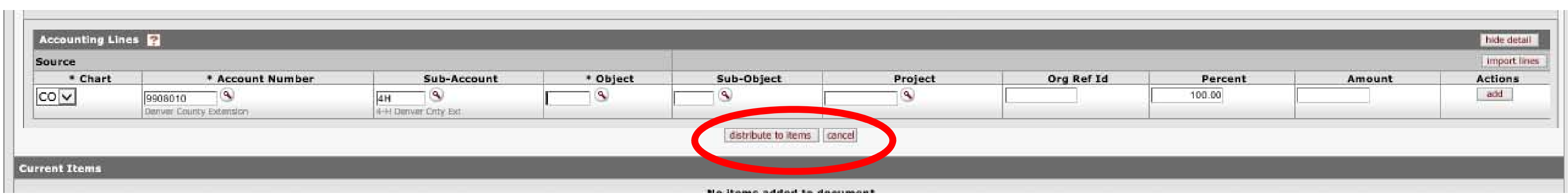
Enter your **account number, and sub-account (optional), and an object code** – see Object Code Quick Reference List on Financial Resources - https://extension.colostate.edu/staff-resources/#finance, or use magnification glass to look-up object code.

- If you are charging the whole amount to that one account/sub-account, then you can leave the **percentage of payment** at 100%. In this case, enter the entire cost in the Amount filed.

  NOTE - If you are splitting the expense to multiple accounts and/or sub-accounts, adjust the percentage and click add, then complete the process until you have assigned 100% of the expense to an account/sub-account. Remember, you have to BOTH the total amount for each line.
- Click the **ADD** button under actions



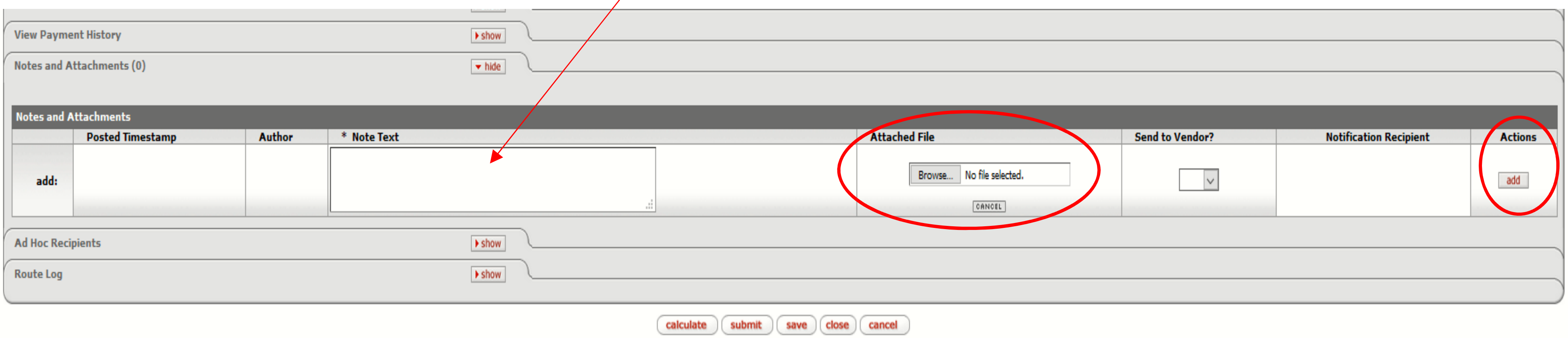
NEXT, click the Distribute Lines button (red text) below the accounting line you just entered.



- All the account information should be there, just enter the total amount of the order, and **Click the ADD** button.

Notes & Attachments:

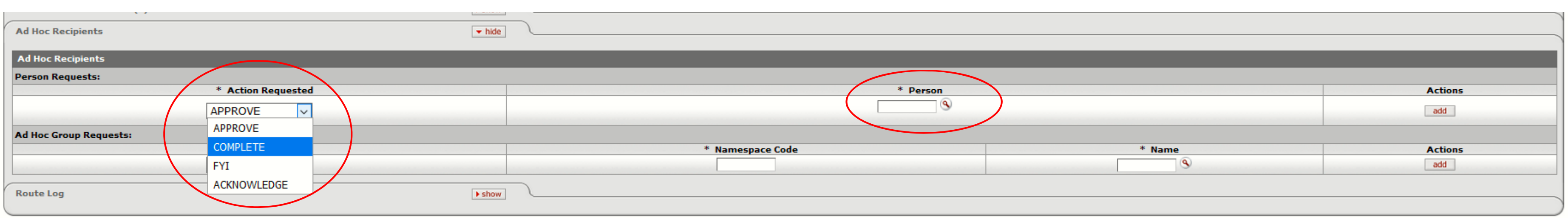
- Upload your quotes and other back-up documentation with a note or description of what is included in the document using the Attached File Browse button.
- Click Add.



Ad Hoc Recipients tab:

Open the **Ad Hoc Recipients** tab, and do the following:

- Select COMPLETE – from the Action Requested drop-down menu
- Search for Person - Click on the magnifying glass to find Laura Barrera, as the person to route the document to for completion.



To Search: Enter her last name and hit search.

Principal Name:	
Principal ID:	
Entity ID:	
First Name:	
Middle Name:	
Last Name:	Barrera
Email Address:	
Phone Number:	
Employee ID:	
Campus Code:	
Primary Department Code:	
Employee Status Code:	
Employee Type Code:	
Active Indicator:	◉ Yes ○ No ○ Both

search clear cancel

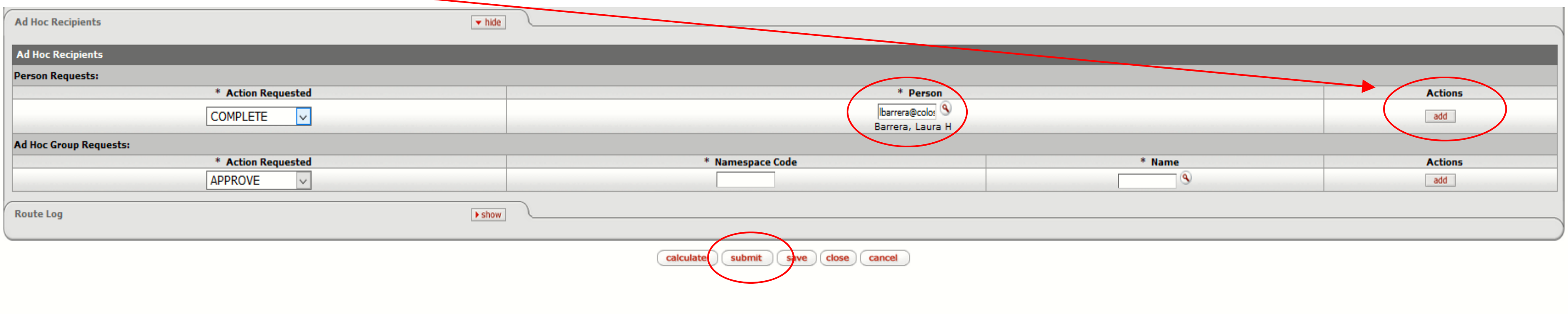
If there is more than one Laura Barrera be sure that you check under the Primary department code and pick the person under dept 4040.

- Click on the return value.

One item retrieved.

Return Value	Principal ID	Principal Name	Name	Entity ID	Campus Code	Primary Department Code
return value	6352	lbarrera@colostate.edu	Barrera, Laura H	4622	MC	CO-4040

- Click the add button, and then Click Submit to route



Congratulations!! Your requisition is on its way to route for review and approval.

Once the purchase order (PO) has been created, the Purchasing office will e-mail both you (the initiator) and the vendor a copy of the PO.