Buy A&M Requisitions Training Version 14 Upgrade

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What is a Requisition?

Requisition documents in Buy A&M allow users to place requests for goods and services. The type of purchase will determine the type of request to be used.

Requisitions are completed by indicating the type of request, adding the items representing the good and services being requested, providing the shipping and billing addresses and indicating funding sources.
Requisition Types

- **Direct Open Market**
  - Purchases that are under $5000, within departmental delegated authority

- **Open Market**
  - Purchases that are over $5000, or outside of departmental delegated authority

- **RPA**
  - Purchases that have already been placed (after the fact) or reimbursements
Exceptions to Departmental Delegated Authority

The following types of purchases must be processed using an Open Market Requisition for processing, as authority has not been delegated to departments, and cannot be purchased using a Direct Open Market Purchase Order or Procurement Card (regardless of the dollar amount) unless approved otherwise by the Department of Purchasing.

- All Software and Major Hardware Purchases (approval on a case-by-case basis)
Creation & Setup

- Login to Buy A&M through Single Sign On

![SSO Menu](image1.png)

![Recent Logon Activity](image2.png)
Upon Logging in you will be directed to the Buy A&M Home Screen
Creating A Requisition

To Create a new Requisition you select the following options:
- The plus symbol at the top left of the screen
- Requisitions
The first thing you will see after creating your new requisition will be the general tab.

Within the general tab you will need to enter the following information:
- Requisition Type: Select type of requisition based on previous descriptions
- Short Description: Enter a brief description of the item or service being purchased

After entering the above information you will “Save & Continue” to retain your information.
Items Tab

The next tab you will be completing is specific information on the items you will be ordering
- Click on the items tab
- click on “Add Open Market Item”
Once you have selected to add an item you will be directed to the following screen to input specific information such as:
- Description of the item being purchased
- Quantity and Unit cost of item(s) being purchased
- Discount amount if applicable
- NIGP Class and NIGP Item Code
This should be a detailed description of the item being purchased.

To add the NIGP code click on the magnifying glass symbol.
When you click on the magnifying glass the search box for this item will appear.

Type in a keyword for the items you are looking for (pencil).

Click on the search button.
Once you have selected search the screen will pull up the options for the item:

Select the item that best fits your description by selecting the radio button.

Next click on the “Save and Exit” button.
Upon clicking “Save & Exit” you will be directed back to the main item entry tab.
- Click “Save & Exit” to retain your information.
Upon Saving you will be directed to the following screen:
- Click on the “Vendors” tab at the top of the screen
Vendor Tab

To add a Vendor to your document click on “Lookup and add Vendor”
This will pull up a vendor search box
- Enter vendor name
- click on “Find It”
This will pull up a list of Vendors that match your search criteria

- Select the check box by the Vendor you want to select
- Click on “Save & Exit”
The Vendor selected will be put into the requisition

Select the check-box for recommended Vendor

Select “Save & Continue”
The Address tab requires no action from the user. It is pre populated with the correct information.
Select the “Accounting” Tab

Click on the magnifying glass to search for your account number.
Clicking on the magnifying glass will bring up the following search box:

- Type in the account number you will be charging the purchase to

- Click “Find it”
This will pull up a list of account numbers in the system that match the search criteria.

- Select the account number that will be used for the purchase

- Click “Select”
The account number you selected will be entered into the requisition.

- Click “Save based on Percentages”
- Click “Rebuild for all items”
No action is necessary on this tab, it will remain blank until the document is submitted for approval.
Add the quote that represents the purchase that is being made

- Click “Add File”
Click “Choose File”
Select the file from your computer
Click “Open”
Click “Save & Exit”
- Enter any information Purchasing needs to know for this purchase. Previous PO#'s, special delivery instructions, Inventory account etc..

- Click save and continue
This is an optional tab, no action is necessary
This is the final screen of the requisition process.
- Look over the information on this screen and verify that it is all correct

Scroll to the bottom of the screen and click “Submit for Approval”
The next screen will show the approval path the document will follow:

Click “Continue”
The status on the document will change to Ready for Approval:
Upon status changing to “Ready for Approval” the submission of your requisition is complete.

The document will electronically route for Approval

The requestor will receive an e-mail when the document is approved and converted to a PO.