

# Purchase Requisitions and Receiving

*Non Vendor Catalog*

*Revised 12/06/2016*

Connect  
CAROLINA

- Please put cell phones on vibrate, don't answer in class. If urgent, please step outside the classroom.



Please do not perform work including email while the class is in session.

- Feel free to ask questions at any time. Questions may be answered immediately, tabled to be addressed later in class or placed in “Parking Lot” to be researched and answered at a later time.
- Schedule/Breaks:
  - One morning and one afternoon break.
  - Anticipated timing of lunch is 12:00.
  - Expectation of when class will finish for the day is 4:30.
- Bathroom location.
- Food, beverage rules or access.



- Emergency
  - Location of exits.
  - Evacuation procedure for location.



**Introduction / Overview**

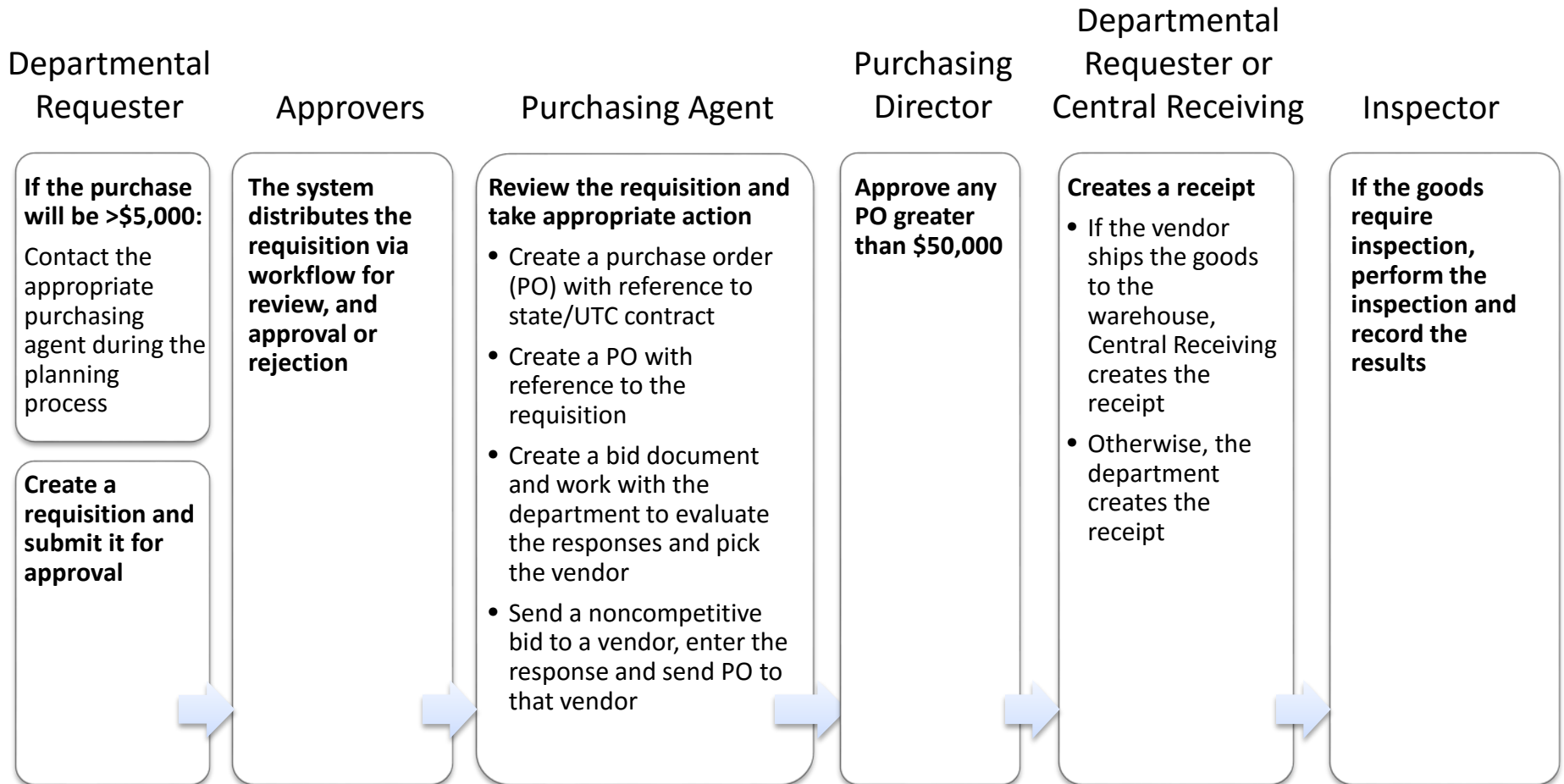
**Introduction/Overview**

Creating a New Purchase Requisition

Managing a Purchase Requisition

Creating a Receipt

Summary/Review



- Student Guide
- Instructor PowerPoint
- Exercise Guide
- Instructor Notes
- Quick Reference Card

## Creating a New Purchase Requisition

Introduction/Overview

**Creating a New Purchase Requisition**

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Summary/Review

- Create a non vendor catalog requisition in either of these situations:
  - The total amount of goods or services purchased  $>$  \$,5000
  - The total amount of goods or services purchased  $\leq$  \$5,000, but the vendor is not in the vendor catalog and requires a purchase order
- Requester Defaults



- Demonstration: Creating a Purchase Requisition
- Exercise 1a Creating a Purchase Requisition
  
- Reference:
  - The Creating a New Purchase Requisition portion of the student guide



- Exercise 1b Creating a Purchase Requisition
- Reference:
  - The Creating a New Purchase Requisition portion of the student guide



## Managing a Purchase Requisition

Introduction/Overview

Creating a New Purchase Requisition

**Managing a Purchase Requisition**

Creating a Receipt

Summary/Review

- Use the Manage Requisitions page to search for requisitions that have already been created. Once you have found the requisition you can:
  - Copy the requisition
  - Print the requisition
  - View the reason the requisition was rejected
  - Modify the requisition
  - Cancel the requisition

- Demonstration: Copy a Purchase Requisition
- Exercise 2 Copy a Purchase Requisition
  
- Reference:
  - The Managing a Purchase Requisition portion of the student guide



- Demonstration: Editing a Purchase Requisition
- Exercise 3 Editing a Purchase Requisition
  
- Reference:
  - The Managing a New Purchase Requisition portion of the student guide



- Demonstration: Cancelling a Purchase Requisition
- Exercise 4 Cancelling a Purchase Requisition
  
- Reference:
  - The Managing a New Purchase Requisition portion of the student guide



## Creating a Receipt

Introduction/Overview

Creating a New Purchase Requisition

Managing a Purchase Requisition

**Creating a Receipt**

Summary/Review



- Create a receipt in the system after the goods arrive
- The vendor will not be paid until the receipt is created
- Departments do not need to create receipts for goods shipped to the warehouse (central receiving will create the receipt)
- Create a receipt for services, in order for the vendor to be paid
- Instructors will need to run the PO Auto Sourcing Process in class to turn the requisitions into purchasing orders so students can create receipts

- Demonstration: Running the PO Auto Sourcing Process
  
- Reference:
  - Instructor Notes for Receiving



- Demonstration: Creating a Receipt
- Exercise 5 Creating a Receipt
  
- Reference:
  - The Managing a New Purchase Requisition portion of the student guide



**Summary/Review**

Introduction/Overview

Creating a New Purchase Requisition

Managing a Purchase Requisition

Creating a Receipt

**Summary/Review**

1. Under what circumstances should a non-vendor catalog purchase requisition be created?
2. When should a department create a receipt in the system?



