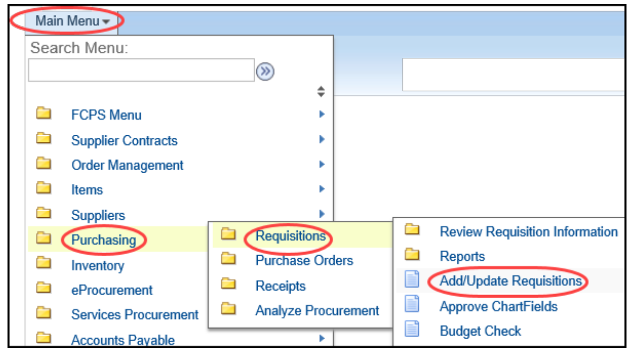
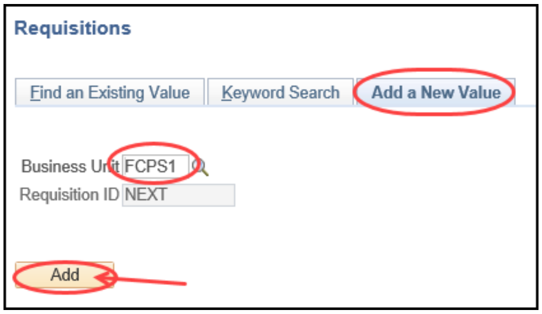
H. CREATING A PRINTING REQUEST REQUISITION

(PLEASE ONLY USE UPPERCASE SO IT IS EASIER FOR THE SUPPLIER TO READ THE REQUISITION)

Step 1 – Opening a New Requisition

1) Click on **Main Menu / Purchasing / Requisitions / Add/Update Requisitions**
2) The **Business Unit** should say: FCPS1
3) Click on **Add**



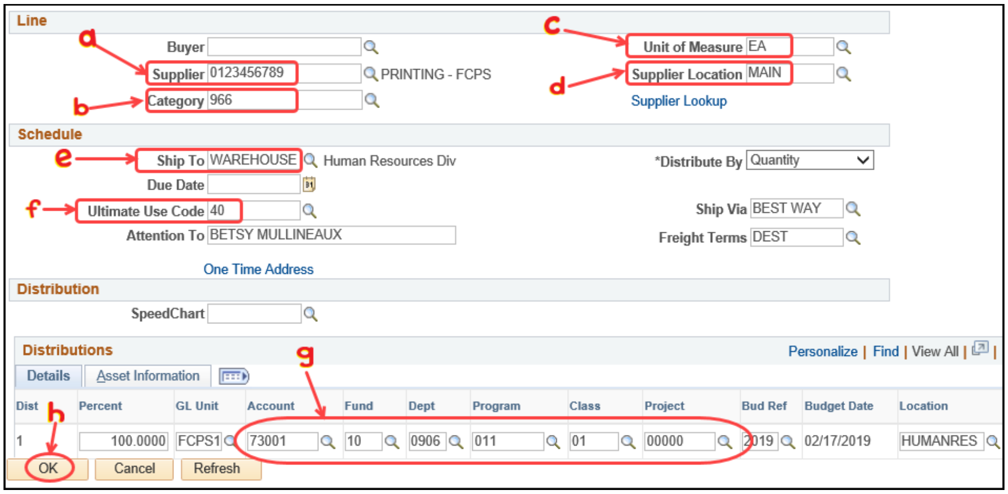


Step 2 – Begin Creating your Requisition (USE ALL CAPS)

4) Enter the **Requisition Name**
(this is for your use only – ex: who it is for, bill to SAF, school dept name, etc.)
5) Use your **Default Origin** (unless you have multiple **Origin #s** or if you are a Media Specialist)

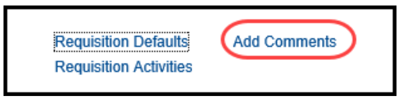
Step 3 – Enter the Requisition Defaults

6) Click on **Requisition Defaults** hyperlink (see picture)
   a. **Supplier** (formerly called **Vendor**) – Type **0123456789** (which is **PRINTING – FCPS**)
   b. **Category** – Type **966** (which is **PRINTING & RELATED SVCS)**
   c. **Unit of Measure** – Select if you will be using the same one for multiple line items
   d. **Supplier Location** – Defaults (change if applicable, check bid list)
   e. **Ship To** – Type **WAREHOUSE** (for free shipping, everything needs to be sent to the Warehouse – if you ship to another location, you will be charged extra for shipping)
   f. **Ultimate Use Code** (formerly called **Requisition Type**) – Type **40** (40 is Printing Services)
   g. Enter an **Account String** (the budget department will give you a list)
   h. Click **OK**



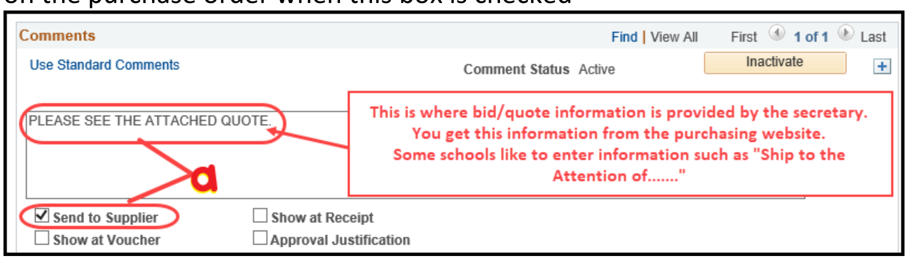
Step 4 – Add Header Comments & Attaching Files

7) Click on **Add Comments** hyperlink

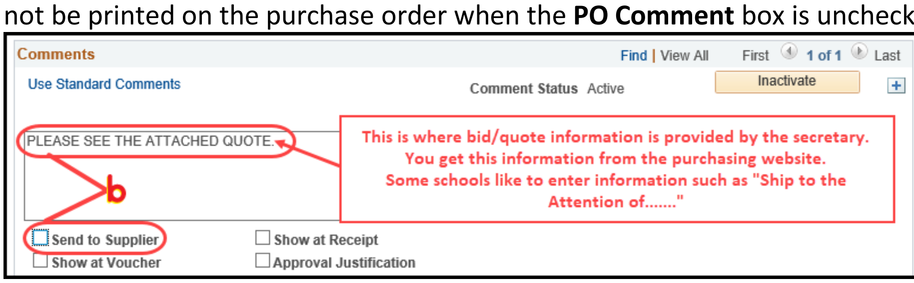


There are three types of **Header Comments** you can use:

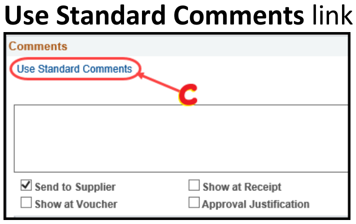
a. **External or PO Comment (this is the default value)** – The comments will be printed on the purchase order when this box is checked



b. **Internal Comment –** The comments are provided for internal review only and will not be printed on the purchase order when the **PO Comment** box is unchecked



c. **Use Standard Comments** link as appropriate (Necessary for **Open Purchase Orders**)

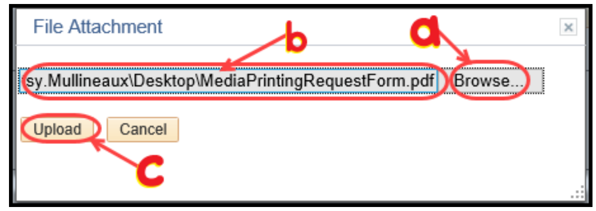


8) You must complete a **Print Request Form** (link to form: Link to Print Request Form) (you can also find it under Inside FCPS / Printing Coordination on the right-hand side) - The **Print Request Form** should be named using the following naming convention: PRF_Name_of_File.PDF

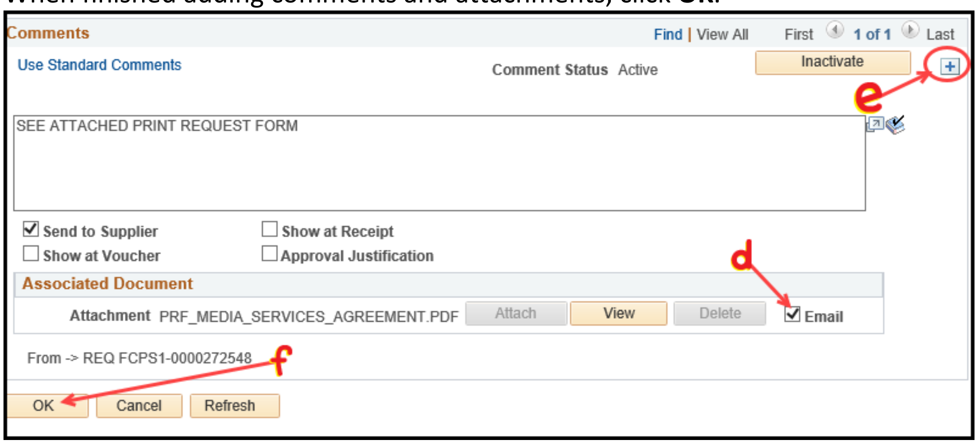
9) Type **SEE ATTACHED PRINT REQUEST FORM** in the comment box

10) Click on **Attach** if you have a quote, bid, etc. to attach

a. Click on **Browse**
b. **Locate** the **Print Request Form** you just completed and double click (the name of the file will be displayed)
c. Click on the **Upload** button



d. The system will automatically check **Email** so the document is forwarded to the supplier (**uncheck** for internal attachment)
e. **Note**: **A comment must be added for each additional attachment**. To **add** another attachment with comment, click on the + icon.
f. When finished adding comments and attachments, click **OK**.

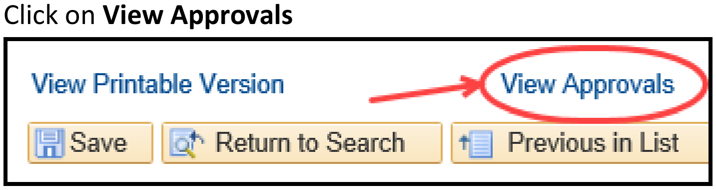


11) Enter print requests:

a. Enter the **Description, Quantity,** and **Price as 0.00** (**Unit of Measure** and **Category** will default)

b. Click **Save**
c. Click **Yes** to **Message** (Is there no charge for line 1 item?)

12) Click on **View Approvals**



13) This is the Approval Path your **Requisition** will go through. If it is correct, go to next step (if it is not correct, check the **Origin** or **Category**)

14) At the top right of the screen next to **Status**, click on the **Green Check Mark** to change the status from **Open** to **Pending** (and it will save again automatically)

Step 5 – Saving a Copy or Printing your Requisition

15) Click on the **View Printable Version** hyperlink

16) It will take you right to the **Requisition**
17) Now you can **Print** or **Save** your **Requisition**
18) Once a **Requisition** becomes a **PO**, you will no longer have the ability to view, print, and/or save it in the same form as when you are creating it. Additionally, you will not be able to print **Requisitions** created by others. No need to worry, you can always find what you need under **Document Status**:
    a. Click on **Main Menu / Purchasing / Requisitions / Review Requisition information / Document Status**
    b. Enter the **Requisition ID** number or the **Requester**

19) Click on the **X** tab for the **Requisition** you are viewing

20) To continue **Creating Requisitions** or bring up an **Existing Document**, click on the **Add** or **Update/Display** icons