A Purchase Order must be generated from an Electronic Purchase Requisition (unless it is a CFI order which must be initiated through the hard copy five-part PO form). This document describes the steps to follow when entering a Purchase Requisition electronically.

In order to be given access to create an Electronic Purchase Requisition you must submit two forms, E-Requisitions Agreement and E-Requisitions Sign Up, as well as complete this training session. The forms are located on the Financial Services website under Forms/Purchasing. [http://uwo.ca/finance/forms/index.html](http://uwo.ca/finance/forms/index.html)

**Content**

1. Creating and Submitting a Purchase Requisition
2. Tracking a Purchase Requisition and Reports

**Overview**

To create a Purchase Requisition you must complete the information in the first five tabs. This provides information on: who the order is for; when it is needed; who do you want to buy from; what do you want to buy; how are you paying; why are you buying these items. Information on the last two tabs is optional.
Western PeopleSoft Financials
Electronic Purchase Requisitions

1. Creating and Submitting a Purchase Requisition

Navigation: UWO Menu/UWO PO Requisition/UWO PO Requisition

1. Click on the Add a New Value tab or link.

2. Enter your Purchase Order Reference number.

   **About PO Reference Number**
   - The PO Reference number is a required field and cannot contain any spaces.
   - It is highly recommended that you create a numbering system that has meaning to you.
   - The PO Reference number can be used on the PO Inquiry screens to determine if a Purchase Order number has been assigned and the status of the Purchase Order.

3. Click on the Add button and the window below will open ready for you to create a new Purchase Requisition

4. Data in this window defaults from your set up information however, you can over-write and modify all of this information.

**Requesting Changes to Requisitioner Defaults and Signing Authority**
- To make data entry as quick and simple as possible values on the Requester tab are defaulted from your set up information.
- If you want to change these defaults (Requester, Ship To Location, Phone), email lzapora@uwo.ca or call ext. 87927 and provide your Login ID and the changes you are requesting.
- Requests for changes to signing authority values or access to departments/projects/grants must be submitted on the E-Requisition Sign up form and signed by the Dean or Budget Unit Head. This form is on the Financial Services website under Forms/Purchasing.
5. Click on the Supplier tab.

6. Enter Vendor ID OX2200 and tab out of field. If you do not know the Vendor ID follow the steps below to search.

### Searching for a Vendor ID by Vendor Name (can also search by Vendor ID)

- Click on the magnifying glass beside Vendor Name
- Click in the Name field and type the vendor name or the first few characters of the name
- Click on the Look Up button
- In the Search Results click on the vendor you want.

If you cannot find the vendor you are looking for it may not be set up and you will need to fill in all the fields in the Supplier window.

7. Enter a contact in the Contact Info field (not required).

8. Click on Order an Item tab.

9. Click on Order an Item button.

10. Enter a description of the goods or services. In some cases the description must begin with certain prefixes (see box below).

### The Description field allows a maximum of 254 characters. The first 30 characters will appear on the GL Inquiries and Research statements. In some cases the description must begin with:

- **Standing Orders** must start with “SO” then the description of goods and services and expiry date of the order.
- **Invoice Received** must start with “INV and invoice #” and a description of the goods and services if you have already received an invoice for this purchase.
- **Radioactive orders** must start with “Radioactive goods” and a description of the goods and services.

11. Enter the quantity.

12. Select the Unit of Measure (UOM).

13. Enter the Unit Price.

14. If you are ordering a radioactive item, you must check the Radioactive checkbox and enter your Permit ID number. The Permit ID number must be valid otherwise your Purchase Requisition cannot be submitted.
15. **Click** on OK button

**Adding Items and Modifying Items**
- To add additional items, click on the Order Item button and repeat steps 10 to 15. You can have as many items on a Purchase Requisition as needed.
- To modify an item, click on the magnifying glass beside the line number and make the necessary changes.

16. **Click** on Accounting Information tab.

17. **Click** on Accounting button.

18. **Enter** accounting information. You can use a speed code and account or the full chartfield combination.

19. The percentage defaults to 100%. This can be changed for each item but the total for all items must equal 100%.

20. **Click** on OK button

**Adding and Modifying Account Information**
- To add additional accounts, click on the Accounting button. PeopleSoft has automatically calculated the remaining percentage. You may change the percentage if you wish to add more accounts. The amount before taxes is displayed beside the percentage.
- To modify an account or percentage, click on the magnifying glass beside the line number and make the necessary changes.
- You will receive an error message if the accounting information has not been entered or if the distribution does not add to 100%.
21. Click on the General tab.

![General tab image]

22. Click on the magnifying glass beside the “I certify the end-use of these items to be” and select the appropriate type. **This is required.**

23. Complete all of the remaining questions on this window.

### What to do if...Invoice is Received, CFI Order or Order with Attachment:

**Invoice Received** - If you already have an invoice for this purchase and do not want the Purchase Order sent to the Supplier, check the box beside “There is an attachment for this requisition”. Next, under Attachment Type and Notes, click on “Invoice” and enter the invoice number in the box to the right. This will ensure that the order is not sent to the Supplier. Check the system for the status of your Purchase Requisition (refer to Section 2) and once a Purchase Order number is assigned write it on the invoice and forward to the Accounts Payable Department.

**CFI orders cannot be done electronically.** Contact the Purchasing Department, Suite 6100, Support Services Building, to submit a paper-based purchase requisition.

**Orders with Attachments** – Some Purchase Orders may require something to be attached to the order. Typical examples are subscription renewals, conference registrations and book orders. Check the box beside “There is an attachment for this requisition”. Next, under Attachment Type and Notes, click on the appropriate type (Renewal Notice, Registration, Order Form, Other). Write the PO Reference number or Purchasing Dept Tracking number on the attachment and fax to the Purchasing Department at ext. 83772. The Purchasing Department will ensure that your Purchase Order will not be sent to the Supplier until the attachment is received and matched to the Purchase Order.
24. **Click** on the Comments to Purchasing tab if you have comments for the Purchasing Department buyer or Accounts Payable.

25. **Click** on the Comments to Vendor tab if you have comments to the Vendor.

### Setting up Standard Comments
- Comments to Purchasing and Comments to Vendors can be different for each Purchase Requisition however, if the note is repetitive, a Standard Note can be set up. Standard Notes are not unique to a specific User. All Requisitioners can access them by selecting from a list of Standard Notes which have already been set up.
- To have a new Standard Note set up, send the information to Izapora@uwo.ca or call extension 87927.
- Only comments entered on the Comments to Vendor window will display on the Purchase Order dispatched to the Vendor.

26. **Click** on the General tab.

27. **Click** on Save button. If your requisition contains a Radioactive item, you will see the following message:

Radioactive items require approval by a Safety Officer in Occupational Health and Safety. You are not able to submit a Purchase Requisition containing a radioactive item. Once you have saved the requisition, an email is automatically sent to the Safety Officer. The Safety Officer reviews, approves and submits the requisition. The shipping address will be changed to Room 003, Chemistry Building. If the Safety Officer has questions regarding the purchase the Requester will be contacted.

28. **Click** on the Printer icon beside the Submit button. This will print a *Draft* copy.

29. **Click** on the Submit button.

### Changes After You Submit
- Once you submit the requisition you can no longer make changes on the system. If a correction or addition is needed, call the Purchasing Department at extension 84579.

### Over Signing Authority Limit
- If the total dollar amount, in Canadian funds, is over your limit you will not be able to submit the requisition. A message will indicate the amount in excess of your authority. In this case you can have someone in your department with the required signing authority submit the requisition for you.
2. Tracking a Purchase Requisition and Reports

You can inquire on the status of your requisitions either by your Purchase Order Reference number, Purchasing Dept Tracking number, Requester Name or Department ID. You can find out; if a Purchase Requisition has been assigned a Purchase Order number; the name of the buyer in the Purchasing Department responsible for the order and whether the Purchase Order has been dispatched to the Vendor.

The Purchasing Department will fax the Purchase Order to the Supplier. Purchase Orders are faxed twice daily.

The following procedures outline the basic steps to track the status of a requisition.

Navigation: UWO Menu/UWO PO Requisitions/Req Track Report by Tracking#

1. If you have not previously set up a Run Control ID click on the Add a New Value tab or link. (Otherwise click on Find an Existing Value tab or link.)

2. To add a run control enter “Report” in the Run Control ID box.

3. Click on Add button.

4. Enter Tracking Number 0000170516.

5. Click on Run button.

6. Click OK button.
Navigate as below to access reports available for tracking your purchase requisitions.