HOW TO ENTER A REQUISITION FOR PURCHASE IN SSB
(Without Template)

1. **Transaction Date=**current date, may be changed if needed
2. **Delivery Date**=current date, may be changed if needed
3. **Vendor ID**-enter the V# assigned to the vendor
   If you do not know it, scroll to the bottom of the form to "Code LookUp".
   - Enter "V" (always) for Chart of Accounts
   - Type = Vendor
   - Code Criteria= leave blank
   - Title Criteria = enter as much of the vendor's name as known with % at the beginning and end
   - Maximum rows to return= leave at 10 unless more is needed
   - Execute Query

   Scroll back to the top of the page to see results.
   Select the correct vendor ID and enter it in **VENDOR ID**
   If the desired vendor is not listed, please contact Purchasing (230-3352)
   Click on **Vendor Validate** to check Vendor ID.
4. **Address Type** = PO
5. **Address Sequence** = 1 (unless more than one address, then pick the sequence with the correct address)
6. **Chart of Accounts** = V
7. **Organization=** should be your home organization code
8. **Ship Code =**VOLST (Gallatin Campus) or LVSITE (Livingston Campus)
9. **Attention To=** the person who will receive purchase
10. **Comments=**instructions to vendor (examples: Rush, Please ship on Tuesday, etc…)
11. **Document Text** = click to open box. Enter any information to be printed on the Purchase Order in top box. This could be special instructions or information for the vendor. Examples: Please Deliver to Maintenance Bldg.; Call Sue with questions-230-5555; etc. Enter your text and click **SAVE. EXIT**.
12. **Item Commodity Code**=enter if known, if not may leave blank.
13. **Commodity** (Item) **Description**=description of item purchasing. If the description is more than 24 characters, click on the # at the beginning of the line you are on and enter the remainder of the description in the top box (if to print on PO and bottom box if not to be printed) and click **Save** and then **close box**.
14. **U/M=**Unit of Measure, select from the drop down.
15. **Quantity=**number of items requested
16. **Unit Price=**cost of each item
17. **Discount Amount=**enter any discount to be received
18. Click **Commodity Validate** to check Commodity Code (if a code is entered)
    The system will calculate the cost of the items requested.
19. Select how the extended cost will be allocated to FOAP. **Dollars=** will allow the Requestor to split the cost between multiple FOAP's by dollar amounts. **Percents=**will allocate cost between multiple FOAP's based upon a percentage.
20. **Chart=**V
21. **Index=**index code, if known, for purchase
22. **Fund, Orgn**, and **Program=**enter codes, if Index is not used
23. **Account =** enter appropriate expenditure (Object) code for purchase (if Index Code is used, must validate before fund, organization and program codes will populate, then Account code can be entered)

24. **Accounting=**if multiple FOAP's are used indicate cost allocated to each (based upon whether Dollars or Percents was selected above).

    If purchases from this vendor are routine, the Requisition information may be saved as a Template that may be recalled for future purchases.

25. **Save as Template-**enter name of template, if desired.
26. **Shared=**check box if Template is to be shared with other Requestors
27. **Validate=**checks all information prior to completing requisition. Correct any errors noted.
28. **Complete=**only if error free
29. Requisition will be forwarded for approvals.
30. **Record Requisition #** on supporting documents and forward to Purchasing.

To View Requisition approval activity or the Document

- At the bottom of the screen or at Main Menu, select **View Document**
- Type in the Requisition number, select **Approval History**

You will see the approvals required for your document. To speed the process along, you may call or e-mail the approvers listed to let them know something is out there to be approved.

To Print a Copy of the Requisition

- When you are in the View screen (see instructions above), select **File** from the tool bar at the top of the screen.
- Then select **Print Preview** (verify that the entire requisition is shown)
- Then select the **printer icon** on the tool bar at the top of the screen.

When to submit a requisition using SSB:

1. Must verify funds availability prior to submitting requisition. If adequate funds are not available, transfer funds using Budget Transfer Form.
2. A requisition is to be submitted when one of the following occurs:
   - Requisitions must be submitted if the purchase is more than $4,999.99.
   - All contracts, maintenance, leases or rental agreements of any value must be submitted on a requisition.
3. A check request or Procurement Card should be used for purchases under $5,000 unless it is for a contract, maintenance agreement, lease or rental agreement.
4. Purchase request is for five different items or less.