

# PARK UNIVERSITY



# TRAINING

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## Requisition for Purchase (User's Guide)

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**Log In:** (login processes may vary depending on individual computer setup)

- 1) Double click on the desktop icon "QuickMate"  
It will automatically appear on your active systems toolbar
- 2) Double click on the desktop icon "Jenzabar"
- 3) Log in to CARS  
Terminal Option #2
- 4) The "Jenzabar-CX Menu" screen will appear  
This is a point-and-click screen
- 5) Select [U] – Utility Menu
- 6) Select [I] – Requisition for Purchase
- 7) Select [Enter] – Finish
- 8) The "Requisition for Purchase – Requisition Header Entry" screen will appear

## Create a Requisition:

- 9) 5 selections are available
  - [?] – Query Requisitions
  - [Req] – Create a Requisition
  - [\$ Review] – Go to Budget Review
  - [→] – Initialize the Requisition Parameters **(NEVER CHANGE!)**
  - [Exit] – Exit Requisition Program
- 10) Click [Req] to go to the “Requisition for Purchase-Requisition Header Entry” page
- 11) A list of “Don’ts”
  - ~Don’t change the “Date Needed By”
  - ~Don’t mark “Confidential” “yes,” keep it “no”
  - ~”Year” (Fiscal Year) is automatic
  - ~Don’t mark “PrePaid PO,” keep it blank
- 12) Enter appropriate Account # that the requested items will fall under—  
\*\*\* (Leave blank if more than one account number will be used).
- 13) “Requisition Description” – provide a brief internal description of request (i.e.: office furniture for John Doe; van rental for student event)
- 14) A list of “Don’ts”
  - ~Don’t enter any “Discount”
  - ~Don’t enter any “Freight” costs
  - ~Don’t enter any “Percentages” in either box
  - ~Don’t enter a “Delivery” location, leave blank
- 15) “Primary Vendor ID” – enter the vendor’s ID #. If the ID # is unknown, use the [?] to conduct a query
  - ~Enter name of vendor
  - ~Click the [Green Checkmark]
  - ~A list of matches will pop-up
  - ~Locate the correct match and enter the number in the bottom left-hand box, then press [Enter] on your keyboard
  - ~An “ID Information” screen will pop-up
  - ~Click the [Green Checkmark] if this is the correct vendor information
  - ~Click the red [X] if it is not the correct vendor information and retrace Step 15 again.
- 16) You will return to the “Requisition for Purchase” form. All necessary fields for the “Primary Vendor ID” will be filled in.
- 17) There may be a time when you want to have a “Secondary Vendor ID” for your purchase request. Follow Steps 15-16 to complete the “Secondary Vendor ID” fields.
- 18) “Requisition Comment” – click on [\*] bar at the bottom of the screen
- 19) Enter a brief description of product or service information.
  - ~You will return to the “Requisition for Purchase-ID Query” screen
- 20) Once the “Requisition for Purchase-ID Query” page is complete, click on the [Green Checkmark]

## Requisition Line Item Entry:

- 21) The “Requisition for Purchase-Requisition Line Item Entry” screen will appear.
- 22) 4 selections are available
  - ~[Green Checkmark] – save changes
  - ~[Red X] – cancel changes
  - ~[Magic Wand] – Save current item and enter the next line item
  - ~[\$] – Enter multiple accounts for the line item
- 23) Complete the following fields
  - ~[Quantity] – enter quantity of the line item (1, 2, 29,....)
  - ~[Units] – each, tons, boxes, ounces, crates, pounds
  - ~[Unit Price] – cost of item
  - ~[Price] – automatically calculates multiple items
    - ~List of “Don’ts”
      - ~Don’t enter “Line Item Discount”
      - ~Don’t enter “Freight”
  - ~[Commodity] – what is the line item (Click on F6 for Commodities List)
  - ~[Item Name] – item name
  - ~[Item Description] – brief description of part number, product code, size, etc.
- 24) Click [\*] bar for “Item Detail”
  - Then you~Include item/part number and model, color, size, weight, quantity, etc.
    - ~~ Enterprise Car Rental **(This is very important or RP will be declined)**
      - ◇ Corporate Account #NA05042
      - ◇ Confirmation #
      - ◇ Pick up date and time
      - ◇ Return date and time
      - ◇ Approved driver
      - ◇ Vehicle type
      - ◇ Absolutely NO 7 or 12-passenger vans
    - ~~Furniture Order from Corporate Express
      - ◇ Quote #
      - ◇ Name and department receiving furniture
      - ◇ Forward via email to Purchasing c/o [donna.baker@park.edu](mailto:donna.baker@park.edu) or [joseph.tristanio@park.edu](mailto:joseph.tristanio@park.edu).

~After product information entry, include: “Attn.: [your name and extension #]” so that there is a point of contact for the request. **THIS IS VERY IMPORTANT.**

~Click [File,] select [Update and Exit]

- 25) Then you will return to the “Requisition for Purchase-Requisition Line Item Entry” screen
- 26) To pay for the line item from multiple funds click [\$] at the top of the screen

- 27) Enter Account # and either \$ amount or % of total for each Account # that will be used for the line item.
- 28) Click the [Green Checkmark] to save the changes
- 29) You will return to the “Requisition for Purchase-Requisition Line Item Entry” screen
- 30) If multiple items are needed on the request, click the [Magic Wand] and repeat Steps 23-29
- 31) Once the “Requisition for Purchase” is complete, click the [Green Checkmark].

### **Requisition Summary:**

- 32) The “Requisition for Purchase-Requisition Summary” screen will appear
- 33) 8 selections are available
  - ~[Exit] – close this screen
  - ~[Arrows down] – page forward
  - ~[Arrows up] – page back
  - ~[Green Insert Line] – go to line item screen with selected items
  - ~[Red X Line] – delete selected items from requisition
  - ~[Printer] – print the requisition
  - ~[Envelope] – submit the requisition
  - ~[Pencil in Pencil Cup] – update the requisition header information
- 34) Line items can be selected by using the [?] and selecting the [\*] then choosing an action from the top buttons
- 35) Review the requisition information

### **Submit Requisition:**

- 36) Click [Envelope] to submit the requisition
- 37) You will return to a blank “Requisition for Purchase-Requisition Header Entry” screen.
- 38) Follow Steps 1-36 to create a new “Requisition for Purchase” or click [Exit] to exit the “Request for Purchase” program.

### **Log Out:**

- 39) Select [E] – Exit
- 40) Place cursor over the CARS task on the active systems toolbar.
- 41) Right click
- 42) Select [X] – Close
- 43) Repeat Steps 40-42 for the CARS QuickMate task

### **Refresher Training:**

44) Contact Purchasing Department, Donna Baker (X6847) or Joseph Tristano (X6382).