HOW TO ENTER A REQUISITION

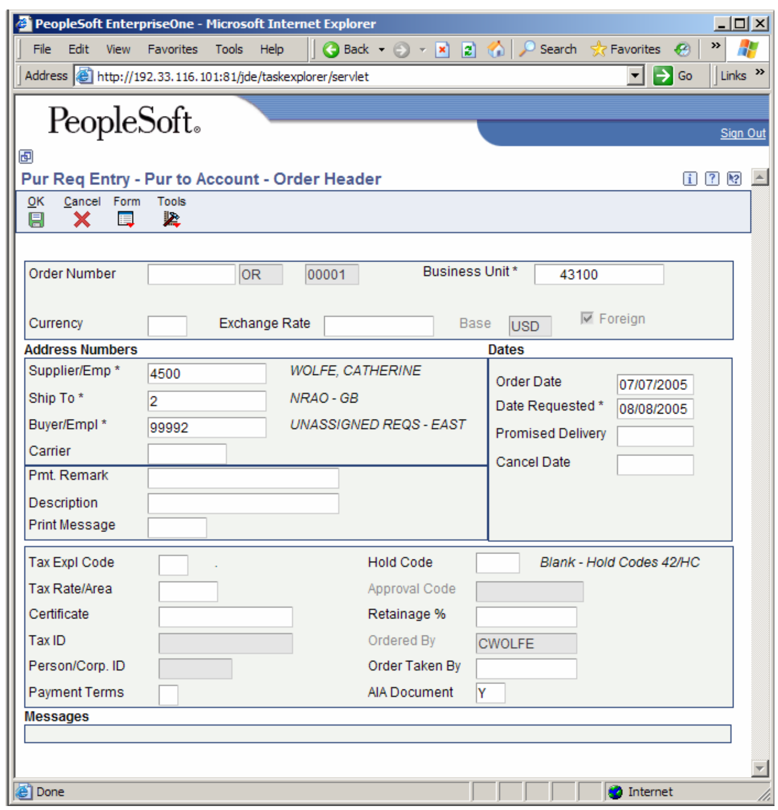
1. a. Begin at the EnterpriseOne home screen. Select **End-User Tasks** from the left-hand menu, then single-click on the Requisition Menu appropriate for your location:
   NRAO Charlottesville/Green Bank Requisition Menu
   NRAO Socorro/Tucson Requisition Menu
   NRAO Chile Requisition Menu

   b. Single-click on:
   Pur Req Entry – Pur to Account

ADD A REQUISITION

2. The **Pur Req Entry - Pur to Account - Work with Order Headers** form will be displayed. To enter a requisition, click on the **Add** button.

ENTER HEADER INFORMATION



3. The **Order Header** form will be displayed. This is where you enter information that applies to the whole requisition. Asterisks indicate the required fields.

   a. In the Supplier/Empl field, enter your employee number.

   b. In the Ship To field, enter the number for the shipping destination.

Ship To #	Destination
6050711	Charlottesville (Edgemont Rd.)
6082924	Charlottesville (NTC)
2	Green Bank
3	Socorro (AOC)
120	VLA Site
5	Santiago

This chart covers the most frequently used shipping destinations. If your destination is not included in this chart, please refer to the complete list in the Ship To Number Quick Reference.

c. In the Buyer/Empl field, enter the number for the Unassigned Buyer for your location:
   99992 ➔ *Unassigned Buyer – East (for Charlottesville and Green Bank)*
   99993 ➔ *Unassigned Buyer – West (for Socorro, VLA, Tucson)*

d. In the Business Unit field, enter the Business Unit number (also known as the Approval Route Code).

> **IMPORTANT:** To determine the correct Business Unit number, look up the account number for your purchase in the **Approval Route Cross Reference** table.

e. Enter the Date Needed. This is the date by which the material is needed.

f. If you would like to request a technical inspection for your order, enter **TI** (for "Technical Inspection") in the Print Message field.

ADD HEADER ATTACHMENTS

> **NOTE:** To add recommended vendor information, use a text attachment here at the Order Header level. This is also where you would add explanations for split account orders, change orders, etc. Details entered here at the header level will not be communicated to the vendor with the resulting PO. **Enter only one text attachment per order header.**

4. To attach additional details to the **entire requisition** (i.e. details apply to every item in requisition), you will attach them here at the Order Header level:

   a. Click on the **Form** button and select **Attachments** from the drop-down menu. This will bring up the **Media Object Viewer** form.

   b. Type any text you wish to attach and click the **Save** button. You may also add file or URL attachments from the **Media Object Viewer** form.

   c. The **Order Header** form will be re-displayed. Click the **OK** button to proceed to the **Order Detail** form to enter items in the requisition.

ENTER LINE ITEMS

5. The **Order Detail** form will be displayed.

   Use the grid at the bottom of the form to:

   a. Enter the Account Number. This is the whole account number, including the decimals, that would have appeared at the top of the old paper purchase requisition.

b. Enter the Quantity Ordered. (For sub-contract/lump-sum orders, leave this blank.)

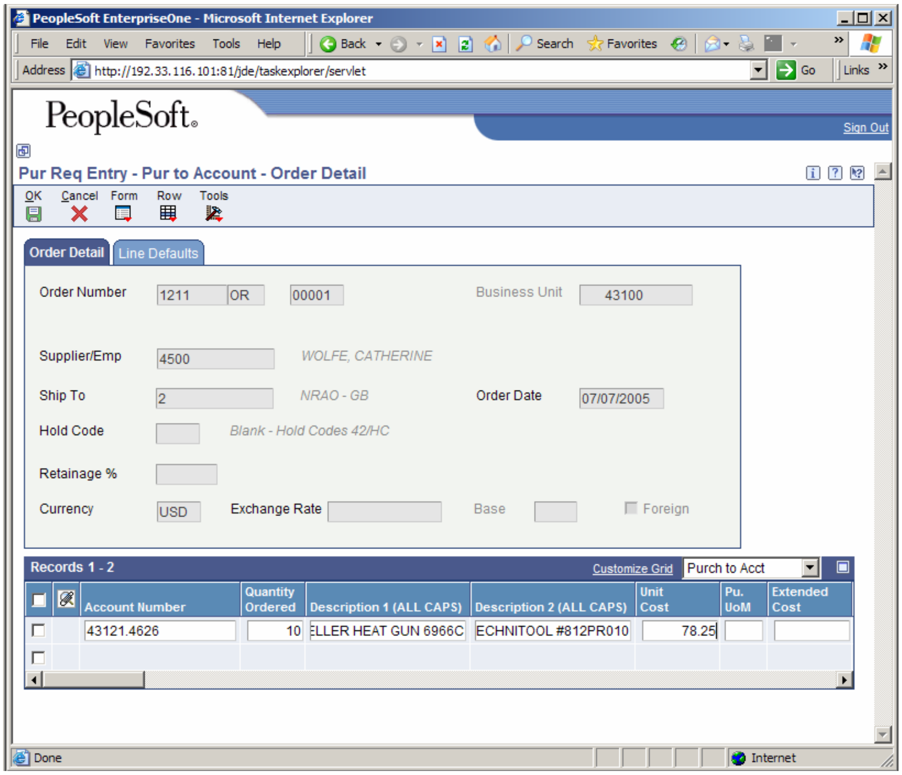
c. Enter a Description. Use ALL CAPS. The Description 1 field is mandatory; Description 2 is optional. If further description is needed, use a text attachment.

d. Enter the Unit Cost. (For sub-contract/lump-sum orders, leave this blank.)

f. Extended Cost is automatically computed by the system. Enter a value only for sub-contract/lump-sum orders.

h. Click on the next line. The system will validate your data and populate any remaining fields.

i. If you don't have attachments to add to any of the items, skip to Step 7.



ADD LINE-ITEM ATTACHMENTS

> **PLEASE NOTE:** Any information attached at the line-item level <u>will be</u> communicated to the supplier with the resulting PO. It would therefore NOT be advisable to include information about preferred suppliers, etc. Those details should be attached at the header level.
> **Enter only one text attachment per line item.**

6. To add an attachment to an **individual item** in a requisition, you will attach them here at the Order Detail level:

   a. Select the check box for the desired item and click the **Row** button. Select **Line Attachments** from the drop-down menu. This will bring up the **Media Object Viewer**.

   b. Add any attachments (text, file, or URL) and click the **Save** button when you are done.

   c. The **Order Detail** form will be re-displayed. You will see a paper clip icon next to the items that have attachments.

CLOSE AND SUBMIT REQUISITION

7. a. Once all items have been added to the requisition, click on the **OK** button to submit it. An e-mail message is sent to the first Approver in the approval route.

   b. If you wish to cancel the requisition without submitting it, click the **Cancel** button to exit. WARNING: All information entered in the requisition will be lost when it is cancelled.

   c. If you want to save the information you have entered in the requisition, but it is not yet ready for approval review, you should submit the requisition and then place a hold on it so that the Approver will know not to act on it. Click on the **OK** button and refer to the Requisition Entry and Review user manual for more detailed instructions on how to hold a requisition for completion.

8. This brings you back to the **Order Header** form, where you can enter another requisition.

   Note the number which appears in the Previous Order field. This is the number of the requisition you just submitted.

   If you have no more requisitions to enter, click the **Cancel** button to exit to the **Work with Order Headers** form.

EXIT REQUISITION ENTRY

10. This brings you back to the **Work with Order Headers** form. If you have more requisitions to enter, you may do so. If not, click the **Close** button to exit.