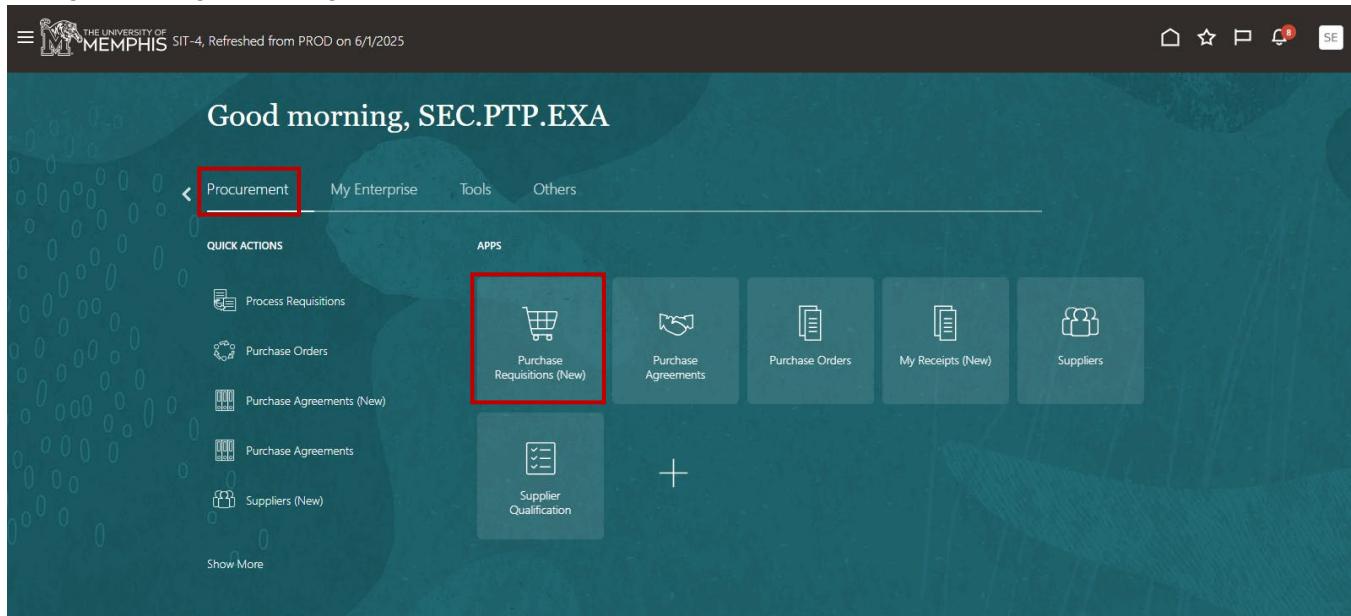
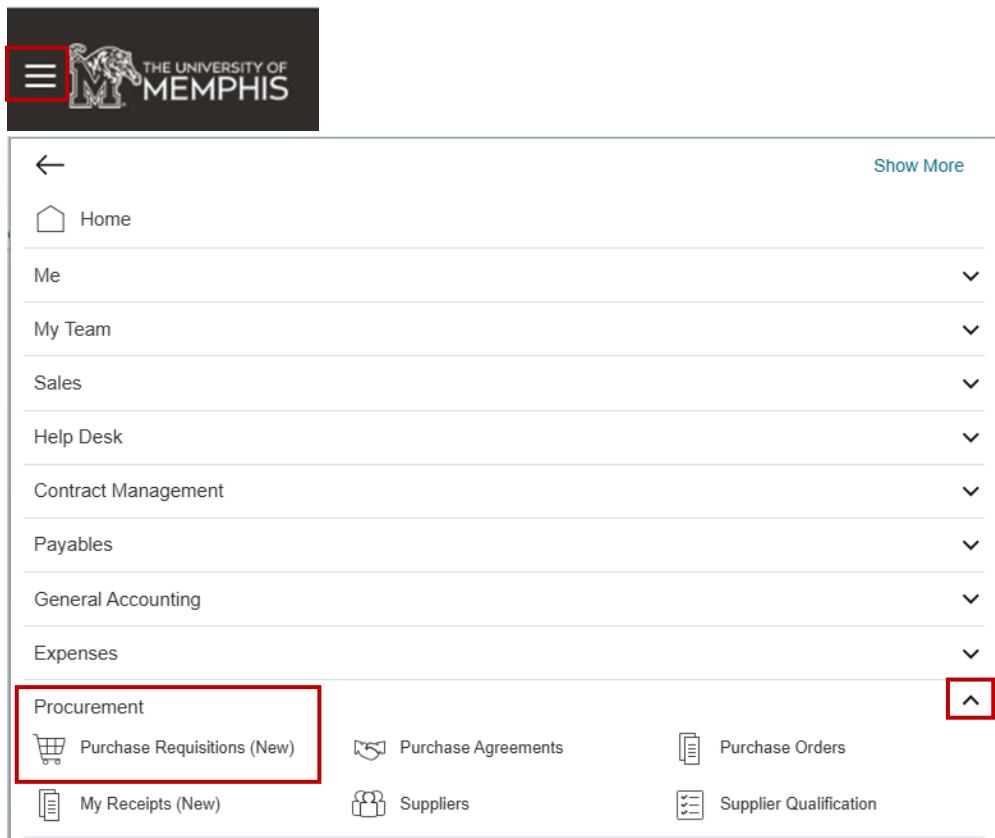


How to - Create a Non-Catalog Goods Requisition

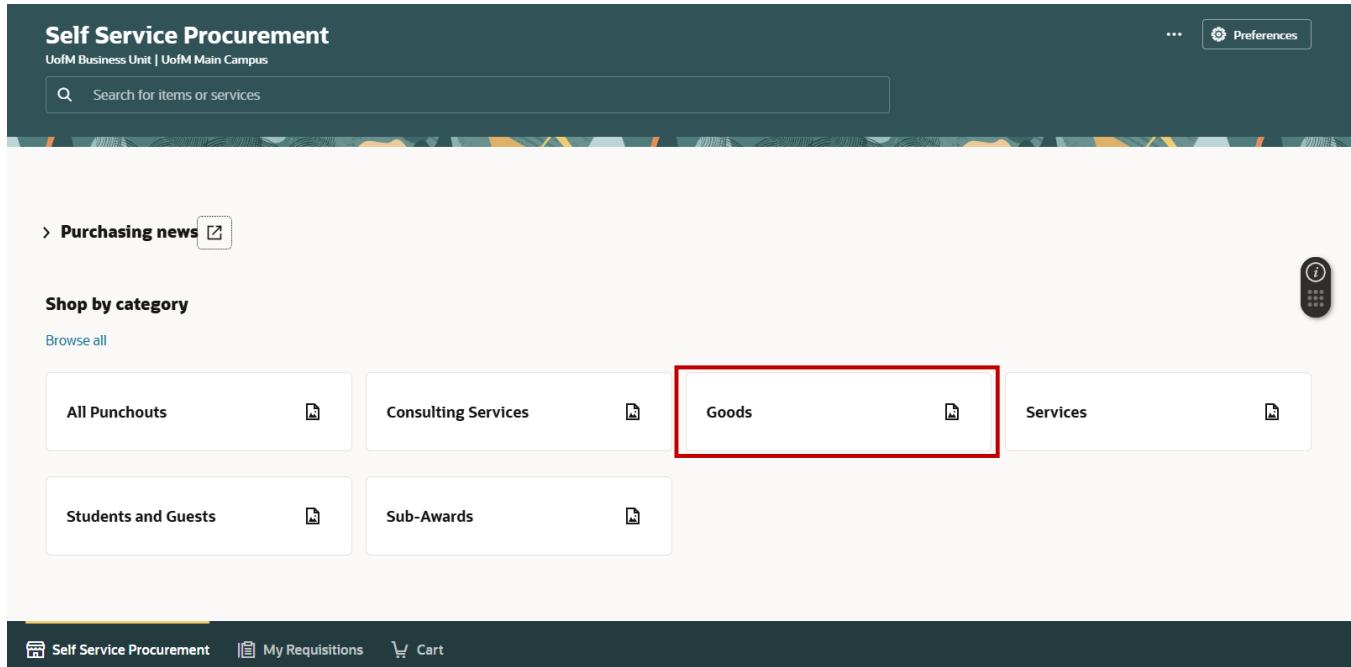
Using the navigator bar, go to **Procurement** and click on the **Purchase Requisitions (New)** tile.



OR click the navigator menu (top left) and click the arrow on the **Procurement** row, then click on **Purchase Requisitions (New)**



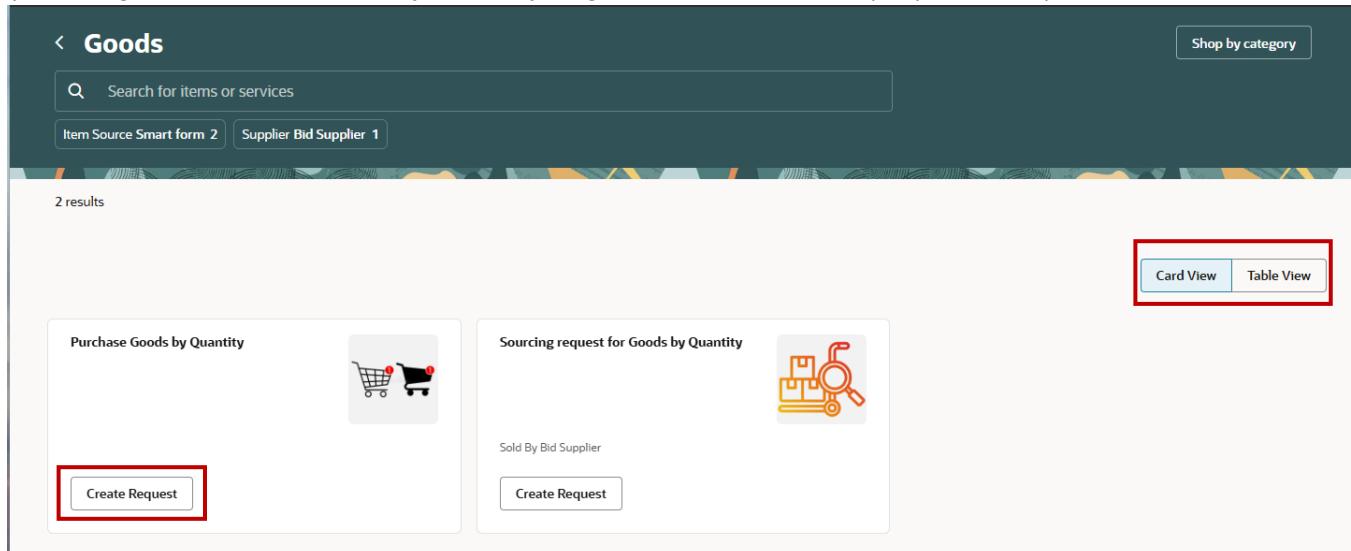
The **Self-Service Procurement** workspace will open. Click on **Goods**.



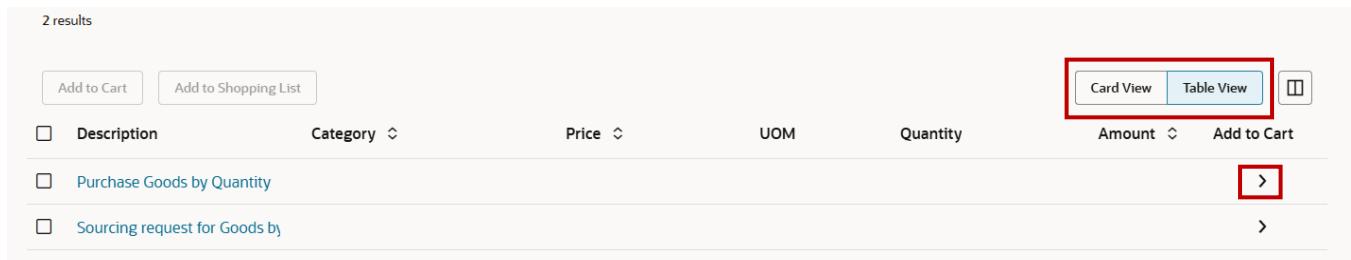
The screenshot shows the 'Self Service Procurement' workspace. At the top, there is a header with the unit name 'UofM Business Unit | UofM Main Campus' and a search bar. Below the header, a section titled 'Purchasing news' is shown. The main area is titled 'Shop by category' and contains several categories: 'All Punchouts', 'Consulting Services', 'Goods' (which is highlighted with a red box), 'Services', 'Students and Guests', and 'Sub-Awards'. At the bottom of the page, there is a navigation bar with links to 'Self Service Procurement', 'My Requisitions', and 'Cart'.

You can view the page as a card view or table view (list).

Purchase Goods by Quantity is for ordering. Click on **Create Request** to begin drafting your order. (Sourcing Request for Goods by Quantity begins the RFP or RFQ (bid) process.)



The screenshot shows the 'Goods' page. At the top, there is a search bar and a 'Shop by category' link. Below the search bar, there are two buttons: 'Item Source Smart form 2' and 'Supplier Bid Supplier 1'. The main content area shows two cards: 'Purchase Goods by Quantity' and 'Sourcing request for Goods by Quantity'. The 'Purchase Goods by Quantity' card has a 'Create Request' button highlighted with a red box. The 'Sourcing request for Goods by Quantity' card has a 'Create Request' button and a 'Sold By Bid Supplier' label. At the bottom of the page, there is a 'Card View' button highlighted with a red box.



The screenshot shows the 'Goods' page in table view. At the top, there are buttons for 'Add to Cart' and 'Add to Shopping List'. Below these, there is a table with columns: 'Description', 'Category', 'Price', 'UOM', 'Quantity', 'Amount', and 'Add to Cart'. The first row contains a checkbox, the text 'Purchase Goods by Quantity', and a right arrow button. The second row contains a checkbox, the text 'Sourcing request for Goods by', and a right arrow button. On the right side of the table, there are 'Card View' and 'Table View' buttons, with 'Table View' highlighted with a red box.

The **Create Request** page will open.

Fill in your **Item Description** and choose the proper **Category** from the pulldown list.

Note that many categories have a choice between **Equipment (durable)** and **Supplies (expendable)**.

Enter your **Quantity**, the **Unit of Measure (UOM)**, and the **Price** per unit.

Create Request

Purchase Goods by Quantity

Item Description Basketball nets	Category Sport and Recreational: Supplies	Spectroscopy: Accessories and Supplies Spectroscopy: Accessories and Supplies
Line Type Quantity		Spectroscopy: Equipment Spectroscopy: Equipment
		Sport and Recreational: Equipment Sport and Recreational: Equipment
		Sport and Recreational: Supplies Sport and Recreational: Supplies
		Telecommunication and Radio: Equipment Telecommunication and Radio: Equipment

Pricing

Quantity 10	UOM Each
Price \$ 12.50	Currency USD

Find your **Supplier** using the pulldown and typing in the first few letters. Your supplier must already be in the system. If they are not, you will need to get your supplier registered with Procurement. *Please see separate instructions for the various methods to register a supplier.*
(the new supplier check box is not currently in use)

If your supplier has a contract, select it in the **Agreement** pull down.

Choose the correct **Supplier Site** (address) and **Contact**.

If the Supplier has an item number, enter it in the **Supplier Item** field.

Source

New supplier X

Agreement Type Contract Purchase Agreement	Agreement
Supplier Sports Imports	Supplier Site PUR_PAY_1
Supplier Contact	Supplier Item

The **Manufacturer & Part Number** fields are available if needed for clarity in your order. They don't apply in all cases.

Manufacturer

Manufacturer	Manufacturer Part Number
--------------	--------------------------

The **Buyer Intervention Required** field allows you to flag a low-dollar order to stop in Procurement rather than auto-approve. This is used when you need a document signed or some other intervention from the Procurement team.

Other Additional information fields can be used as needed.

Additional information

Start Date	End Date
Buyer Intervention Required	Attribute Value
No No	
Yes Yes	

This **Notes** field is at the Line level.

Notes

Note to Supplier
This will show up on the PO.

Add any **Attachments** you need at the Line level and select how / who they will show.
(see below for Header level attachments)

Attachments

Category
Internal to Requisition

Drag and Drop
Select or drop files here.

URL

Category
Internal to Requisition

Internal to Requisition

Miscellaneous

To Approver

To Buyer

To Receiver

To Supplier

Internal to Requisition = attached to Requisition in the system

Miscellaneous = not currently used

To Approver = sent in email to the approver and attached to Requisition in the system

To Buyer = sent in email to the procurement team and attached to Requisition in the system

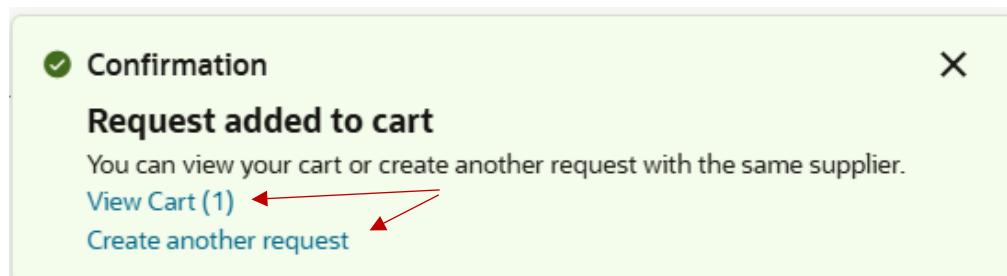
To Receiver = sent in email to the receiver and attached to Requisition in the system

To Supplier = sent with PO to the supplier and attached to Requisition in the system

When your line is ready, scroll to the top and click **Add to Cart**

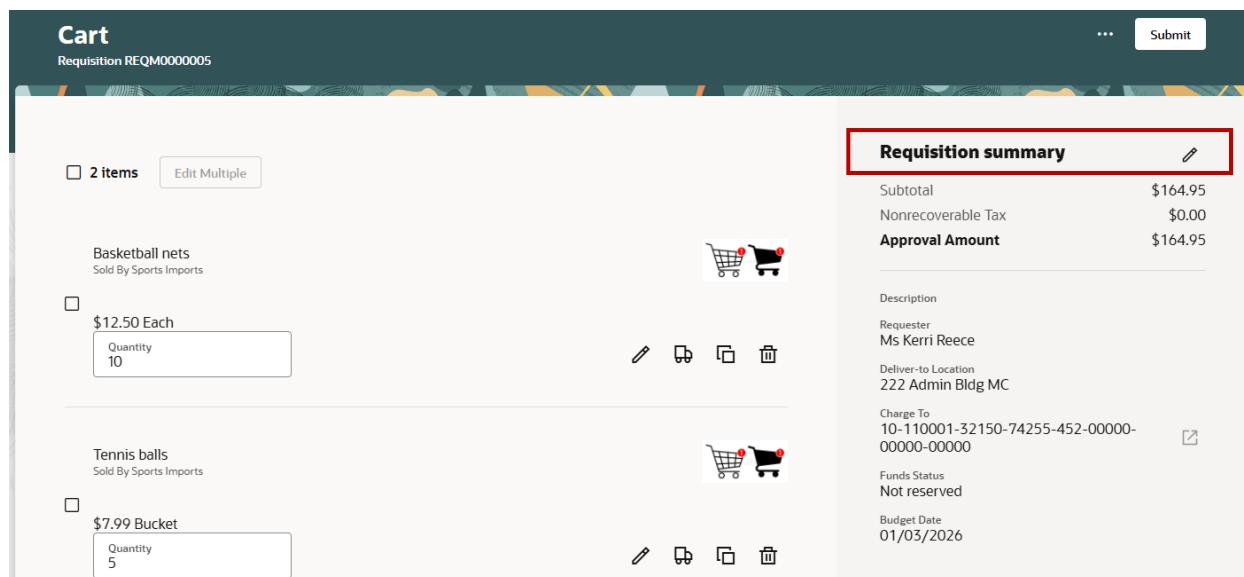


A confirmation will pop up. From that message you can add a line by clicking **Create another request** or go to the **cart** to complete your purchase. The number next to the cart is the number of items currently in the cart.



Your cart will process and open as a draft Requisition.

Click the **pencil** in the **Requisition Summary** (top right) to complete the Requisition header.



Add a description and your business purpose in the **Description** field.

Under the Delivery section you will see your default information. You can change this if needed.

REQM0000005

Requisition

Description
Sports supplies for recreation.

Justification
Any additional info needed?

Emergency purchase order request

Delivery

Requester
Ms Kerri Reece

Requested Delivery Date
01/04/2026

Deliver-to Location
222 Admin Bldg MC

Project costing

Project Number

Charge account

Select favorite charge account Enter charge account number

Charge To

Budgetary control

Budget Date
01/02/2026

Additional information

Attribute Value

If this is a project related expense, fill in the **Project Costing** field.

Otherwise, you will use the **Charge account** field to enter your COA (Chart of Accounts). This is for the overall order. Splitting or charging lines separately is at the line level (see below)

The **Budgetary control** field would be used in June / July to indicate the correct fiscal year budget to use.

Additional information is not currently used.

The **Notes** section is available if needed. This is at the header level

Notes

Note to Supplier

This **Attachments** field is at the header level. Select how / who they will show.

Attachments

Category Internal to Requisition

Drag and Drop
Select or drop files here.

URL Add URL

Category Internal to Requisition

Internal to Requisition

Miscellaneous

To Approver

To Buyer

To Receiver

To Supplier

Internal to Requisition = attached to Requisition in the system

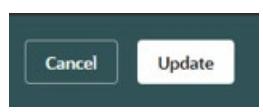
Miscellaneous = not currently used

To Approver = sent in email to the approver and attached to Requisition in the system

To Buyer = sent in email to the procurement team and attached to Requisition in the system

To Receiver = sent in email to the receiver and attached to Requisition in the system

To Supplier = sent with PO to the supplier and attached to Requisition in the system

 Scroll up to the top and hit **Update** to save the information and return to the Cart screen. You will see the information on the right side of the screen has updated. You can now work on individual lines.

Cart

Requisition REQM0000005

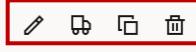
Cancel ...

Requisition summary	
Subtotal	\$164.95
Nonrecoverable Tax	\$0.00
Approval Amount	\$164.95

Basketball nets
Sold By Sports Imports

\$12.50 Each

Quantity 10



Tennis balls
Sold By Sports Imports

\$7.99 Bucket

Quantity 5



- The **pencil** takes you to **line details** if you need to edit anything.
- The **truck** takes you to **delivery & billing**. This is where you split a line or code it differently from the overall order.
- The **squares** will create a duplicate line.
- The **trash can** deletes the line.

Under the **Delivery and Billing Details** tab, the lines have an ellipses (...) menu that allows you to edit or split the COA details for the line. Once you have everything the way you need it, click the **Update** button.

Requisition Line Details
Requisition REQM0000004, Line 1

Billing

Total

Total Percentage 100	Total Amount \$11.56	Total Quantity 1
-------------------------	-------------------------	---------------------

Distribution 1
10-110001-32150-74250-452-00000-00000-00000

Percentage 100	Amount \$11.56	Quantity 1
-------------------	-------------------	---------------

...
Edit
Split

Before you **Submit**, you have the ability to **Check Funds** (budget check) using the ellipses (...)

Cart
Requisition REQM0000005

2 items [Edit Multiple](#)

Basketball nets Sold By Sports Imports	<input type="checkbox"/>	
\$12.50 Each	<input type="checkbox"/>	
Quantity 10	Edit Delete Split Move	

Tennis balls Sold By Sports Imports	<input type="checkbox"/>	
\$7.99 Bucket	<input type="checkbox"/>	
Quantity 5	Edit Delete Split Move	

Requisition summary

Subtotal
10-110001-32150-74255-452-00000-00000-00000

Nonrecoverable Tax

Approval Amount

...
Check Funds
View Approvers
View PDF
Save for Later

Description
Requester
Ms Kerri Reece

Deliver-to Location
222 Admin Bldg MC

Charge To
10-110001-32150-74255-452-00000-00000-00000

Funds Status
Not reserved

Budget Date
01/03/2026

You'll see a message across the top. If it does not pass the budget check, **View details** will let you see which stage if failed so you can move budget around or correct your COA.

Cart
Requisition REQM0000005

... [Submit](#)

The requisition passed the funds check process. [View details](#)

Requisition summary

Subtotal	\$164.95
Nonrecoverable Tax	\$0.00

The screenshot shows the 'Self Service Procurement' page. At the top, it says 'UoM Business Unit | UoM Main Campus'. Below that is a search bar with the placeholder 'Search for items or services'. A red arrow points to a card in the 'My recent requisitions' section. The card has a 'Pending approval' status and the ID 'Requisition REQM0000164'. It lists 'Supplies for recreation activities' with '2 Lines' and was 'Date Submitted 01/03/2026'.

Once you hit submit, you will see a quick confirmation message and return to the Self-service procurement page. Your recent Requisitions are here on cards. The status will update as the order progresses. You can click the card to open the Requisition.

You can also view a list of Requisitions or Requisition Lines by clicking **My Requisitions** at the bottom of the page. You can also export the list(s) to excel using the download button.

The screenshot shows the 'My Requisitions' page. At the top, there are search and filter options: 'Entered By Ms Kerri Reece', 'Search for requisitions', 'Supplier Amazon Capital Services Inc 2', 'Requisition Status Approved 0', 'Line Status Approved 0', and 'Action Required Create change order 0'. Below this is a table with 3 items. Each item has a 'Delivered' status, a requisition number, a description, a purchase order, a price, a date, and a 'More' button. In the top right corner of the table, there are buttons for 'Requisitions', 'Lines', and a download icon. At the bottom, there is a navigation bar with 'Self Service Procurement', 'My Requisitions' (which is highlighted with a red box), and 'Cart'.

The export gives you a clean worksheet that allows you to work with your data immediately.

The screenshot shows an Excel spreadsheet titled 'MyRequisitions...'. The ribbon at the top includes 'File', 'Home' (selected), 'Insert', 'Draw', 'Page Layout', 'Formulas', 'Data', 'Review', 'View', 'Automate', 'Help', 'Acrobat', and 'Copilot'. The 'Home' tab has various font and style tools. The data is in a table with columns: A (Requisitioning BU), B (Requisition), C (Entered By), D (Status), E (Item), F (Item Description), and G (Category Name). The data rows are:

	Requisitioning BU	Requisition	Entered By	Status	Item	Item Description	Category Name
1	UoM Business Unit	REQM0000001	Ms Kerri Reece	Delivered		499H33 TK135482919T Permanent Marker Set Ass	Office Products and Suppli
2	UoM Business Unit	REQM0000002	Ms Kerri Reece	Delivered		Sharpie Clear View Highlighter Sticks, Chisel Tip, /	Office Products and Suppli
3	UoM Business Unit	REQM0000003	Ms Kerri Reece	Delivered		Sharpie Clear View Highlighter Sticks, Chisel Tip, /	Office Products and Suppli