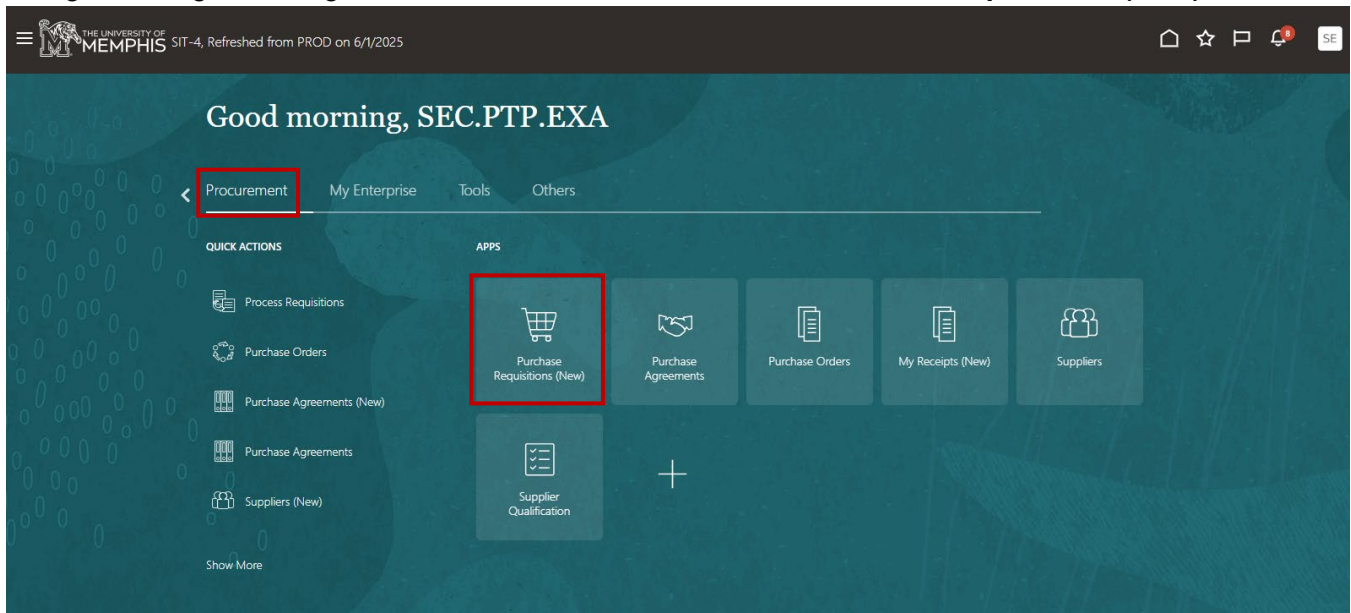
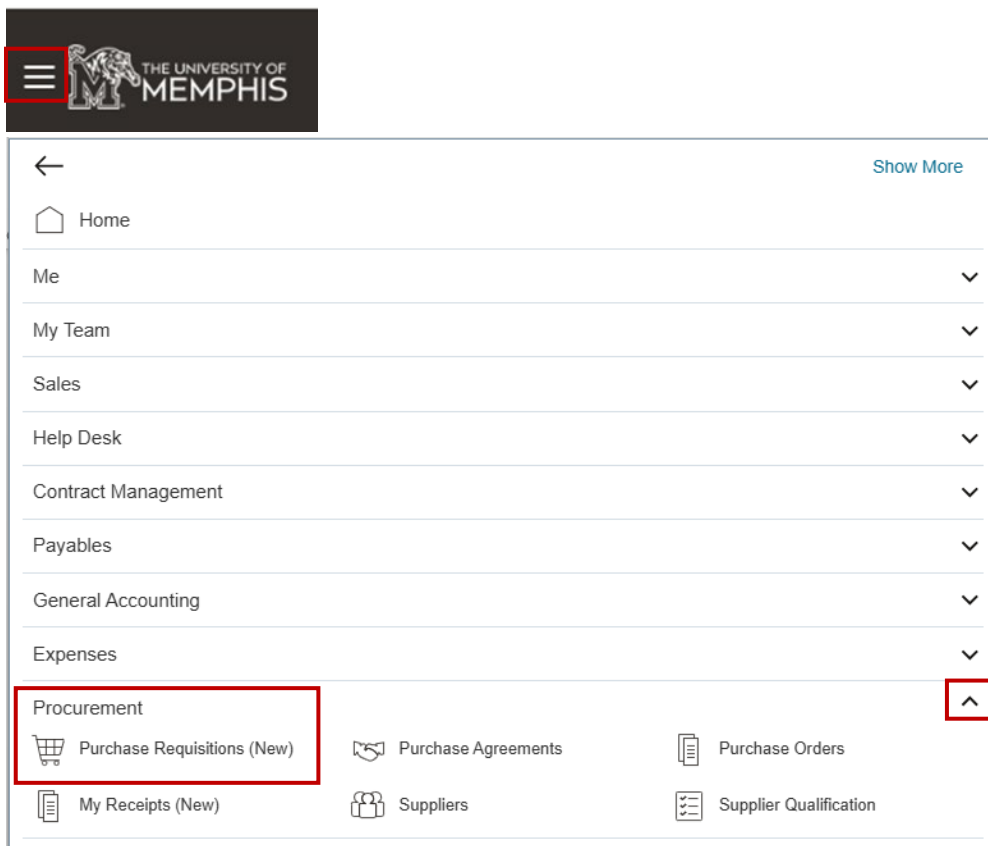


How to - Create a Non-Catalog Services Requisition

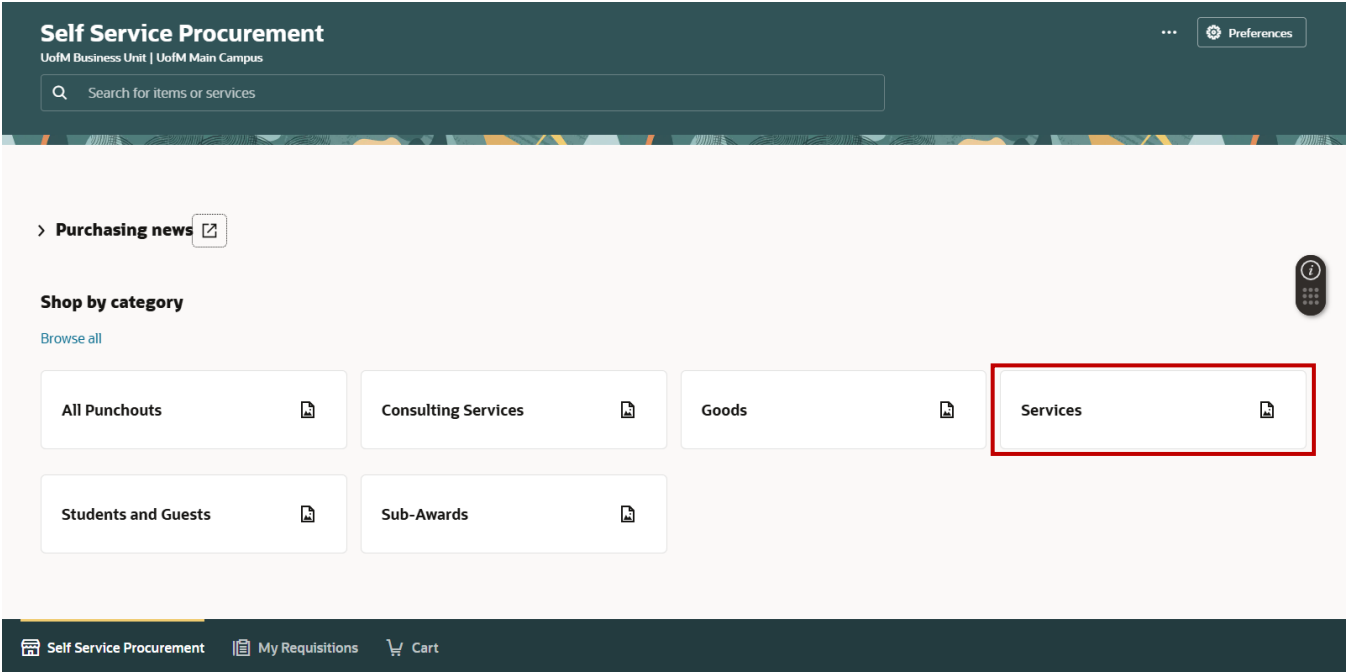
Using the navigator bar, go to **Procurement** and click on the **Purchase Requisitions (New)** tile.



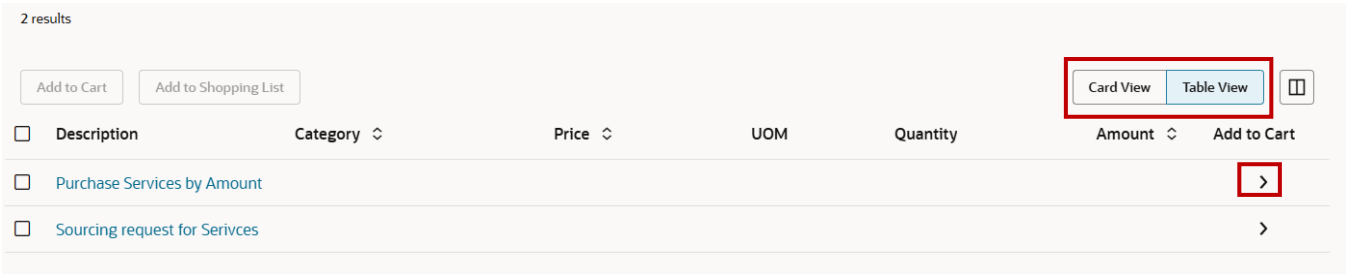
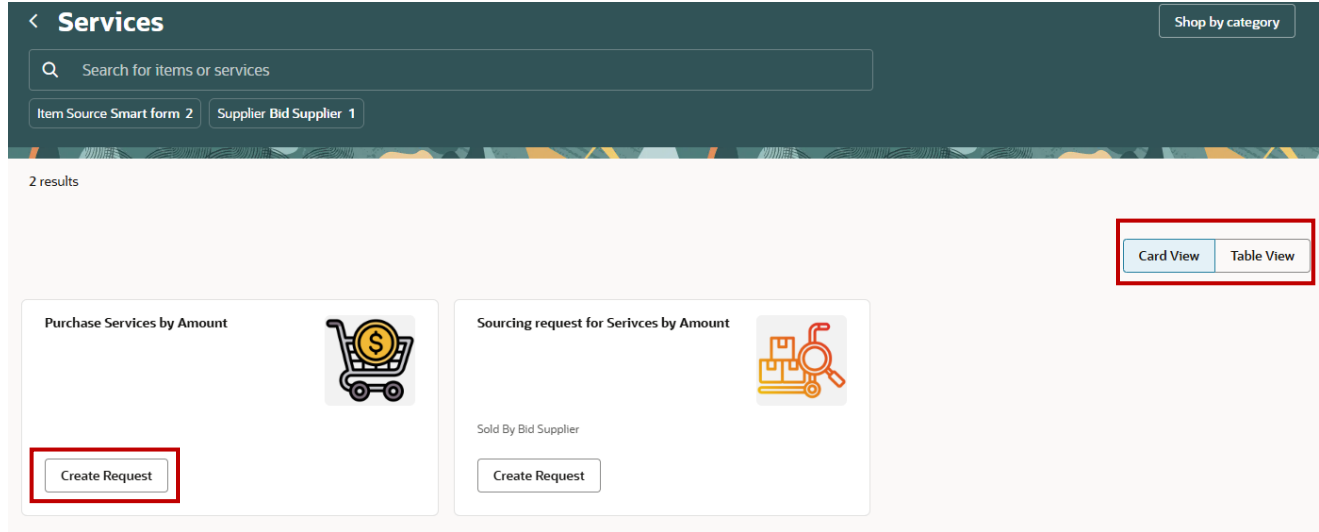
OR click the navigator menu (top left) and click the arrow on the **Procurement** row, then click on **Purchase Requisitions (New)**



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



You can view the page as a card view or table view (list).
Purchase Services by Amount is for ordering. Click on **Create Request** to begin drafting your order.
(Sourcing Request for Services by Amount begins the RFP or RFQ (bid) process.)



The **Create Request** page will open.

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

Enter the service **Price**.

Create Request

CancelAdd to ListAdd to Cart

Purchase Services by Amount

Item Description
Repair sink

Line Type
Fixed Price Services

Pricing
Amount
\$350.00

Category
Plumbing: Services

Currency
USD

Network Consulting / Service
Network Consulting / Service

Plumbing: Services
Plumbing: Services

Printing and Publishing: Services
Printing and Publishing: Services

Protein Chemistry-related Services
Protein Chemistry-related Services

Public Order, Security, and Safety Services
Public Order, Security, and Safety Services

Real Estate Services
Real Estate Services

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

Agreement Type
Contract Purchase Agreement

Supplier
Memphis Best Consulting & Remodel LLC

Supplier Contact

Agreement
Agreement



Supplier Site
PUR_PAY_1

Supplier Item

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 ▼ No No Yes Yes	Attribute Value ▼

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 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

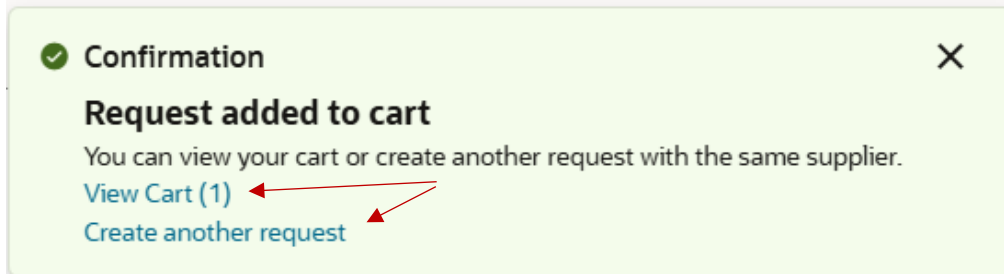
To Receiver = sent in email to the receiver and attached to Requisition in the system

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

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

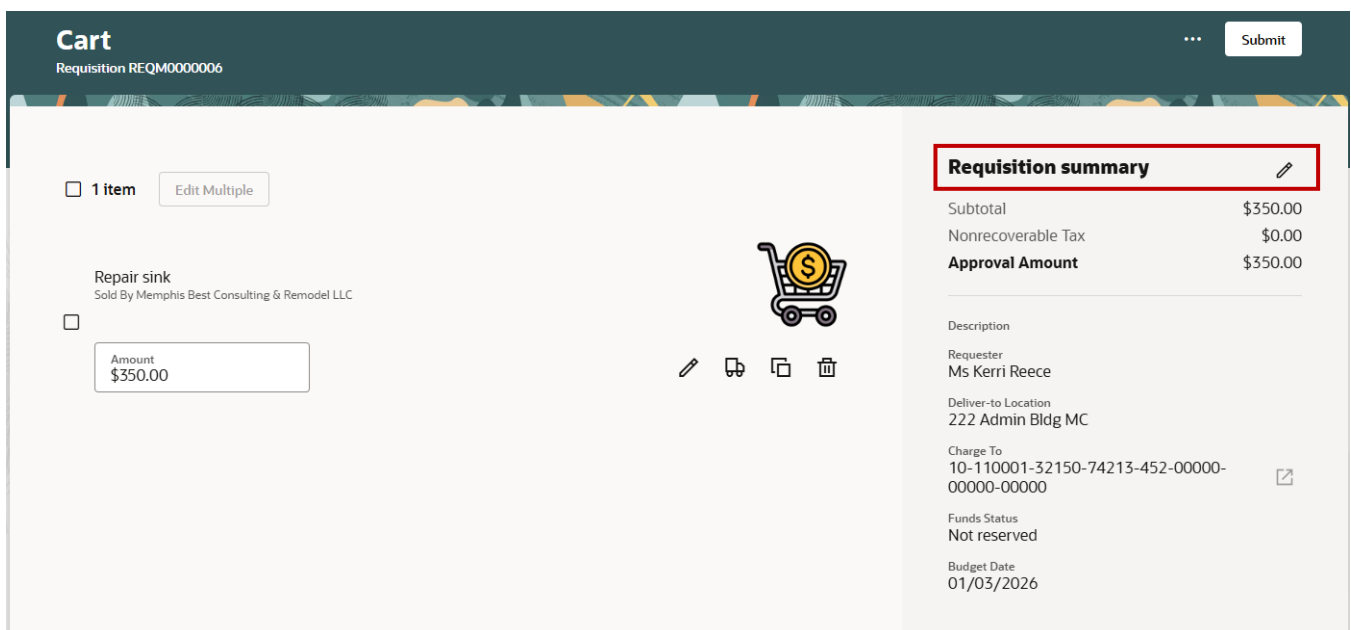


A confirmation will pop up. From that message you can add a line by clicking **Create another request** or go to the **cart** to complete your purchase. The number next to the cart is the number of items currently in the cart.



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.

REQM0000006

CancelUpdate

Requisition

Description
Repair for sink in lab

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

Cancel Update

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 REQ00000006

☐ 1 item Edit Multiple

Repair sink
Sold By Memphis Best Consulting & Remodel LLC

☐ Amount
\$350.00

Edit Delivery Duplicate Delete

Requisition summary

Subtotal \$350.00
Nonrecoverable Tax \$0.00
Approval Amount \$350.00

Description
Repair for sink in lab

Justification
Any additional info needed?

Requester
Ms Kerri Reece

Deliver-to Location
222 Admin Bldg MC

Charge To
10-110001-32150-74213-452-00000-00000-00000

Funds Status
Not reserved

Budget Date

- 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

CancelUpdate

Line Details

Delivery and Billing Details

Billing

Total

Total Percentage	Total Amount	Total Quantity
100	\$11.56	1

Distribution 1

10-110001-32150-74250-452-00000-00000-00000

Percentage	Amount	Quantity
100	\$11.56	1

...

Edit

Split

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

Cart

Requisition REQM0000006

...

Submit

1 item

Edit Multiple

Repair sink

Sold By Memphis Best Consulting & Remodel LLC

Amount

\$350.00

Requisition summary

Subtotal

Nonrecoverable Tax

Approval Amount

Description

Repair for sink in lab

Justification

Any additional info needed?

Requester

Ms Kerri Reece

Deliver-to Location

222 Admin Bldg MC

Charge To

10-110001-32150-74213-452-00000-00000-00000

Funds Status

Not reserved

Budget Date

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

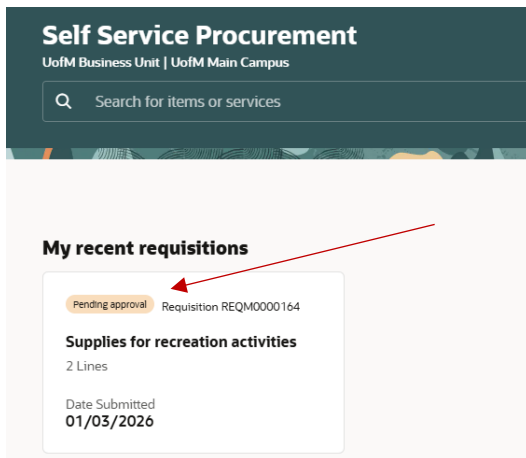
Requisition summary

Subtotal

Nonrecoverable Tax

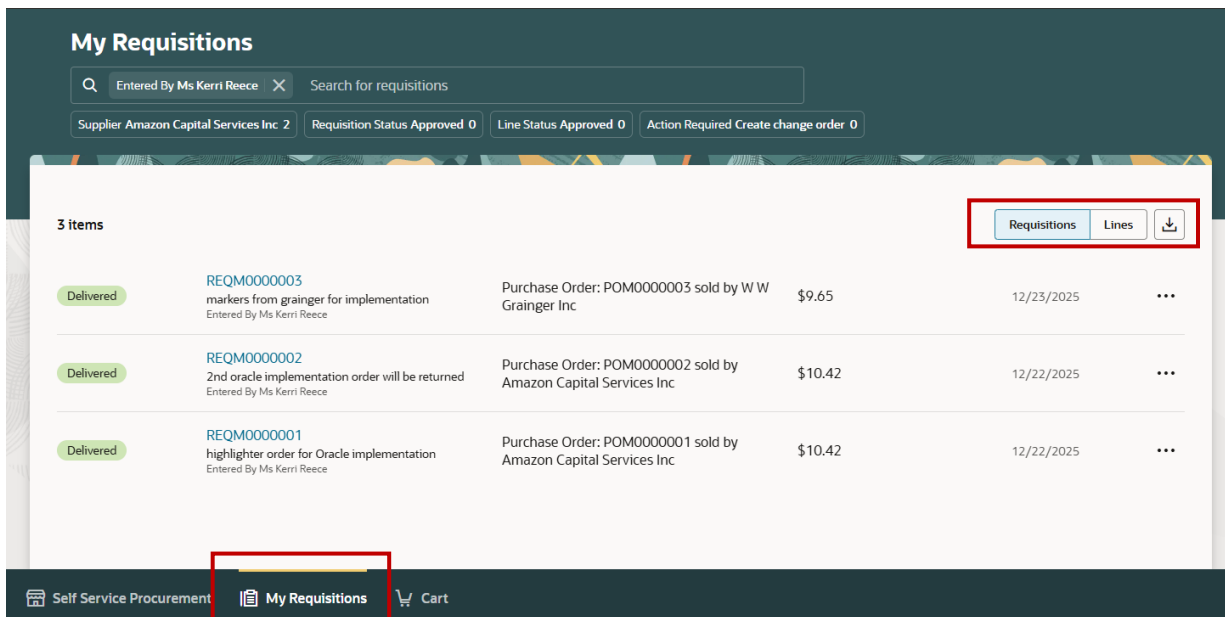
\$164.95

\$0.00



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

AutoSave Off MyRequisitionsL... Saved to this PC Search

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Acrobat

Paste Font Alignment Number Styles Cells Editing Sensitivity Add-ins Copilot Create PDF and Share link S Adobe.

A1 Requisitioning BU

	A	B	C	D	E	F	G
1	Requisitioning BU	Requisition	Entered By	Status	Item	Item Description	Category Name
2	UofM Business Unit	REQM0000000	Ms Kerri Reece	Delivered		499H33 TK135482919T Permanent Marker Set Ass	Office Products and Suppli
3	UofM Business Unit	REQM0000000	Ms Kerri Reece	Delivered		Sharpie Clear View Highlighter Sticks, Chisel Tip, /	Office Products and Suppli
4	UofM Business Unit	REQM0000000	Ms Kerri Reece	Delivered		Sharpie Clear View Highlighter Sticks, Chisel Tip, /	Office Products and Suppli