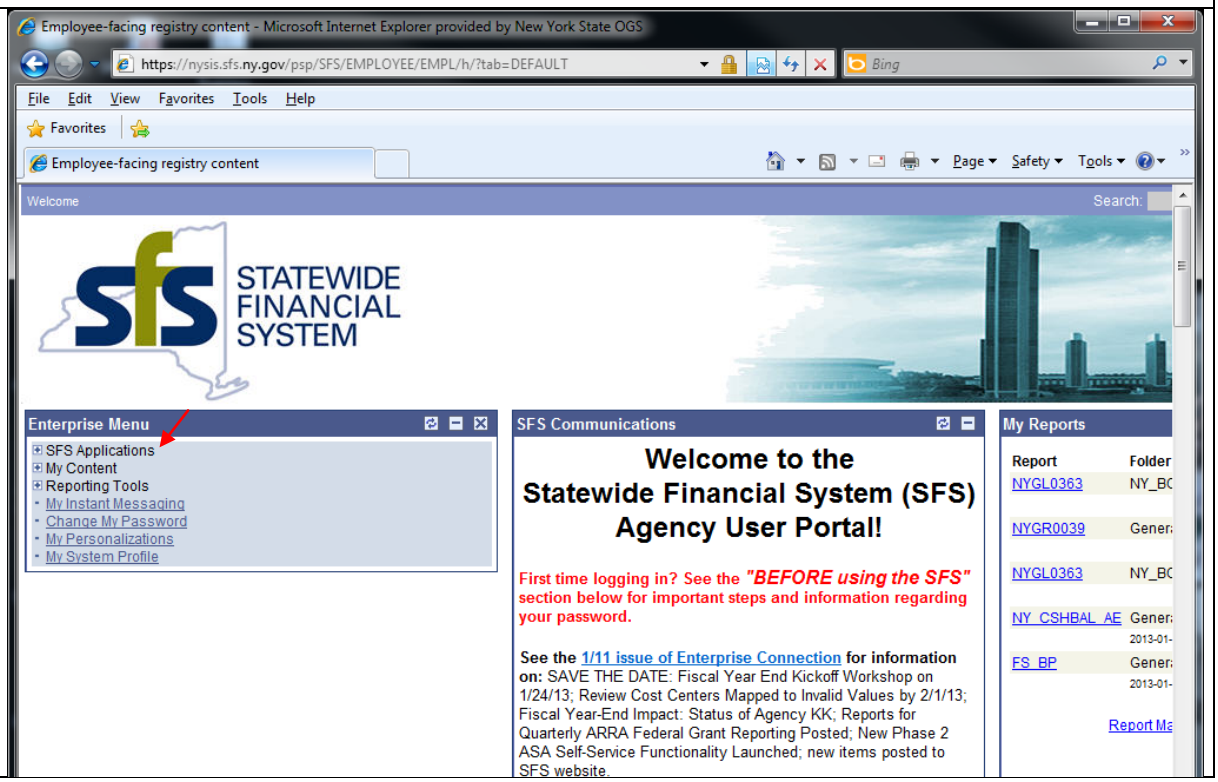
New York State Office of General Services
Business Services Center
Empire State Plaza
Albany, NY 12242
(Phone) 518-457-4272
(Fax) 518-486-9166

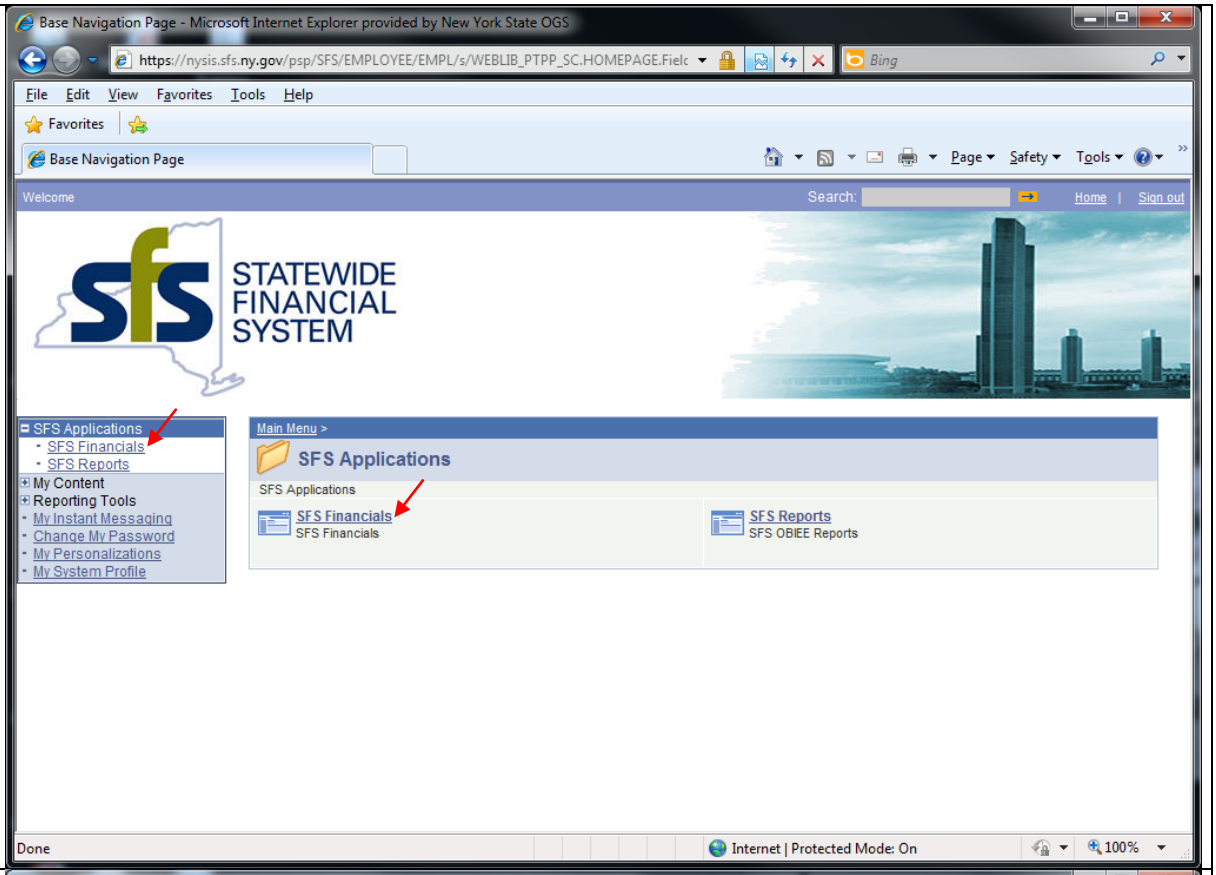
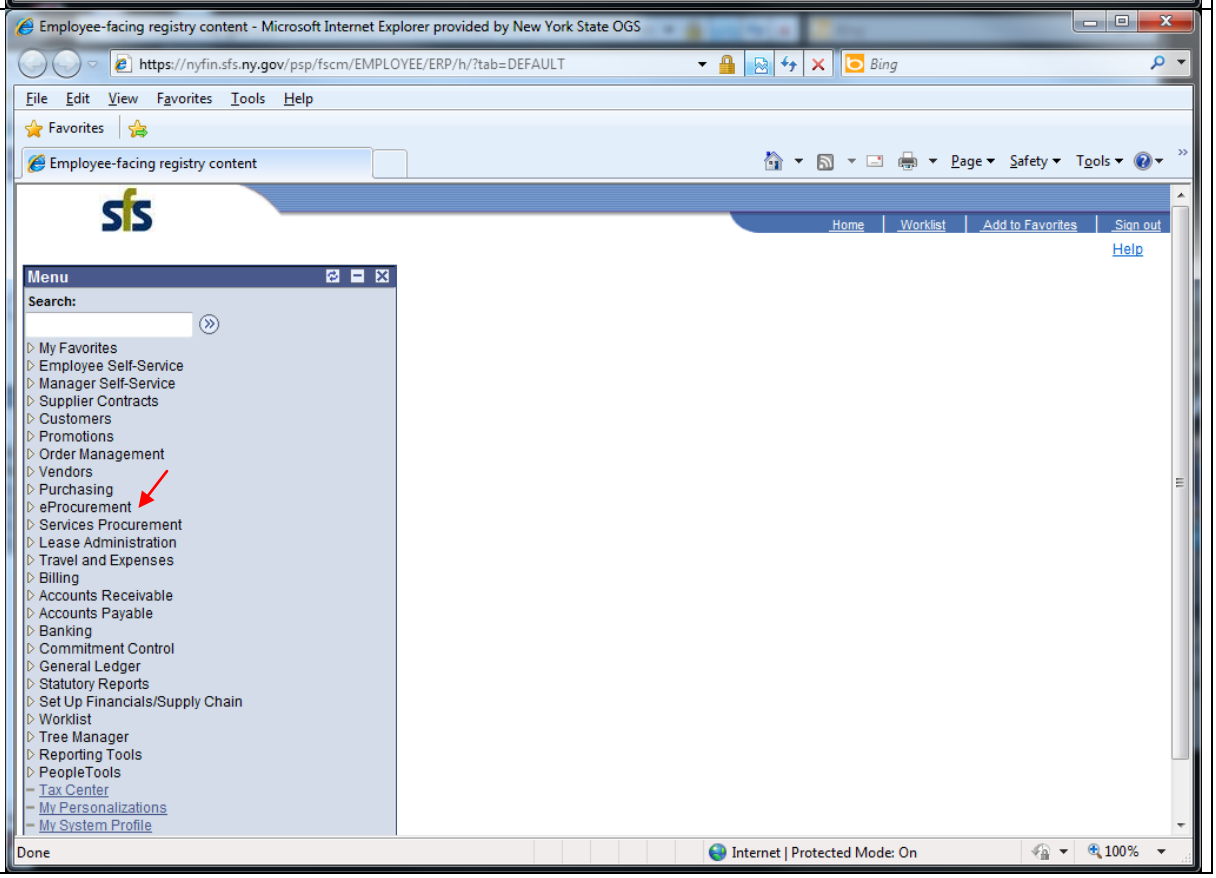
Creating a Requisition in SFS

Creating and approving a requisition are the first steps in the basic purchasing lifecycle.

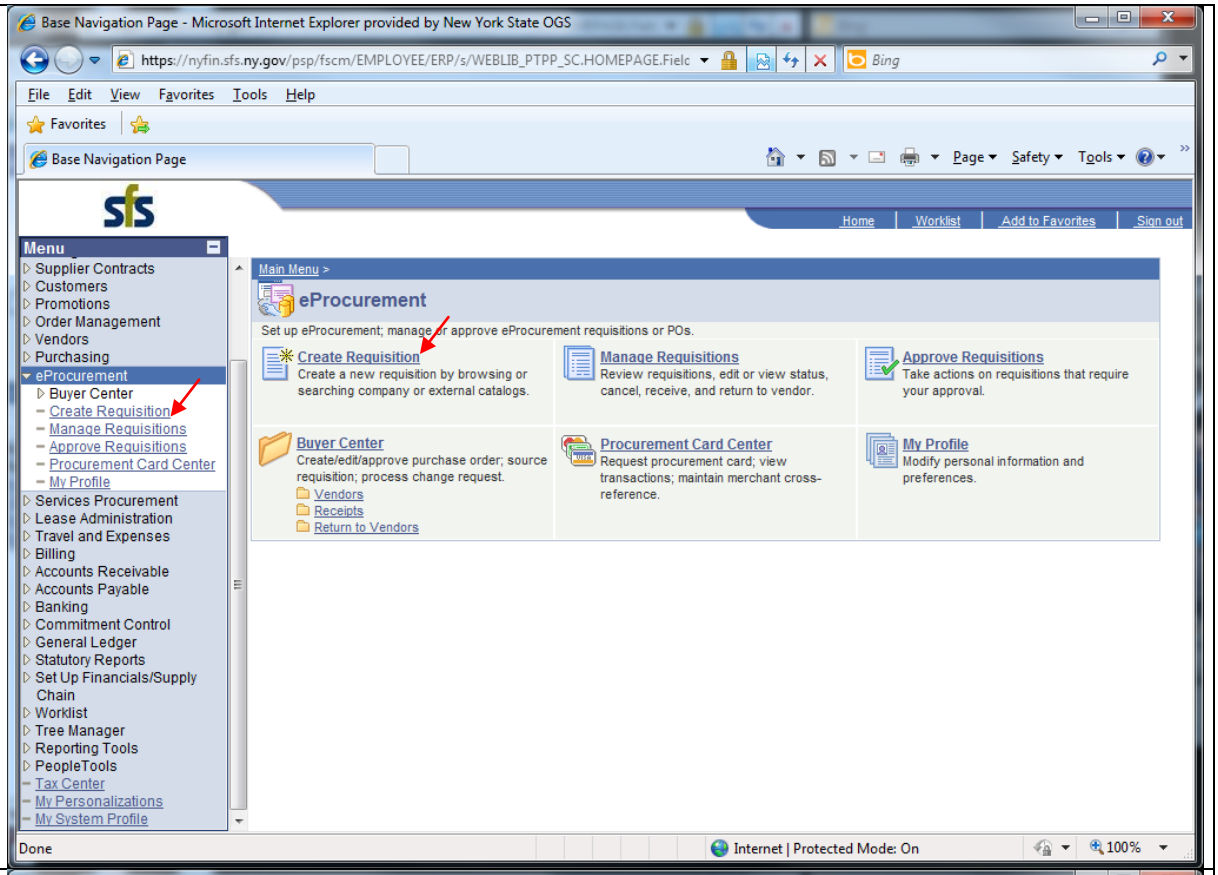
In this module, you will learn how to create a requisition in SFS.

To begin, click SFS Applications.



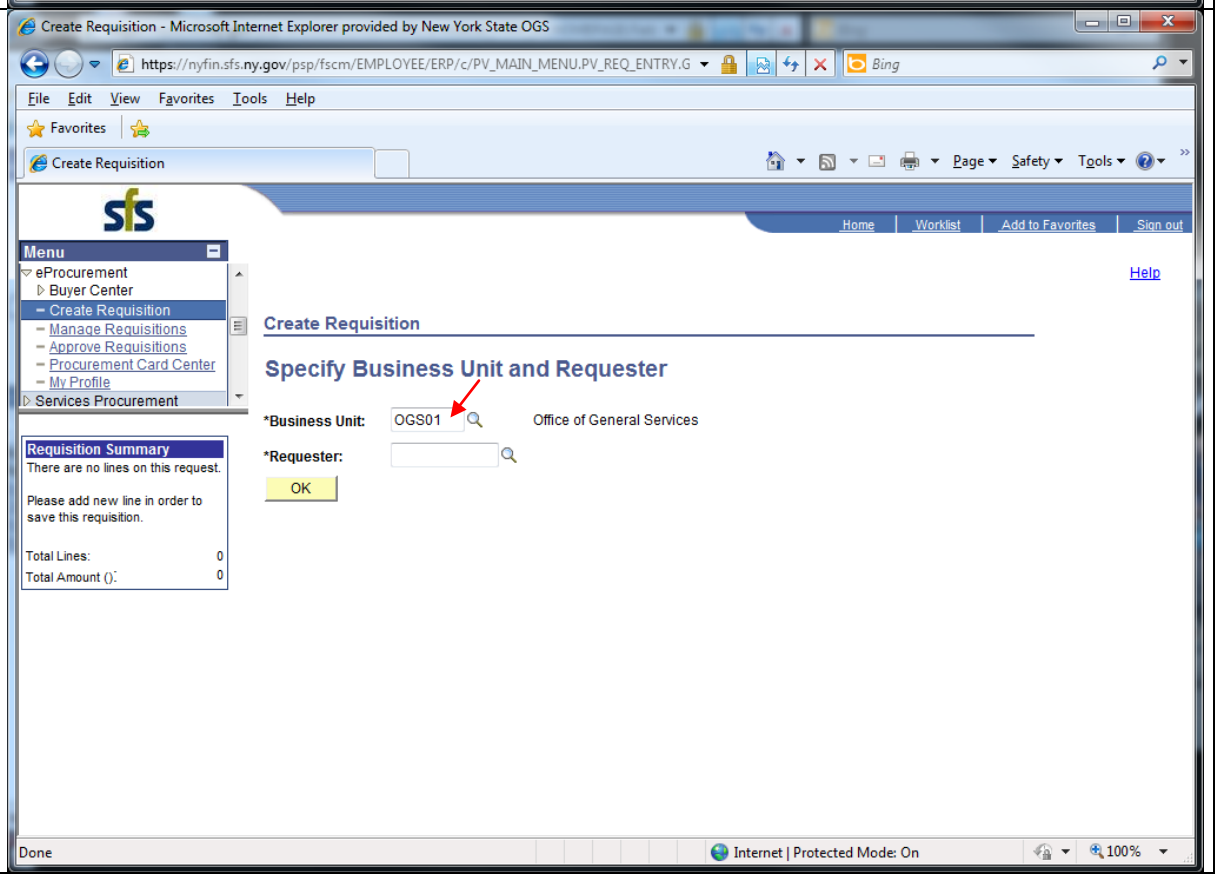
Click SFS Financials (either location).	
Click eProcurement.	

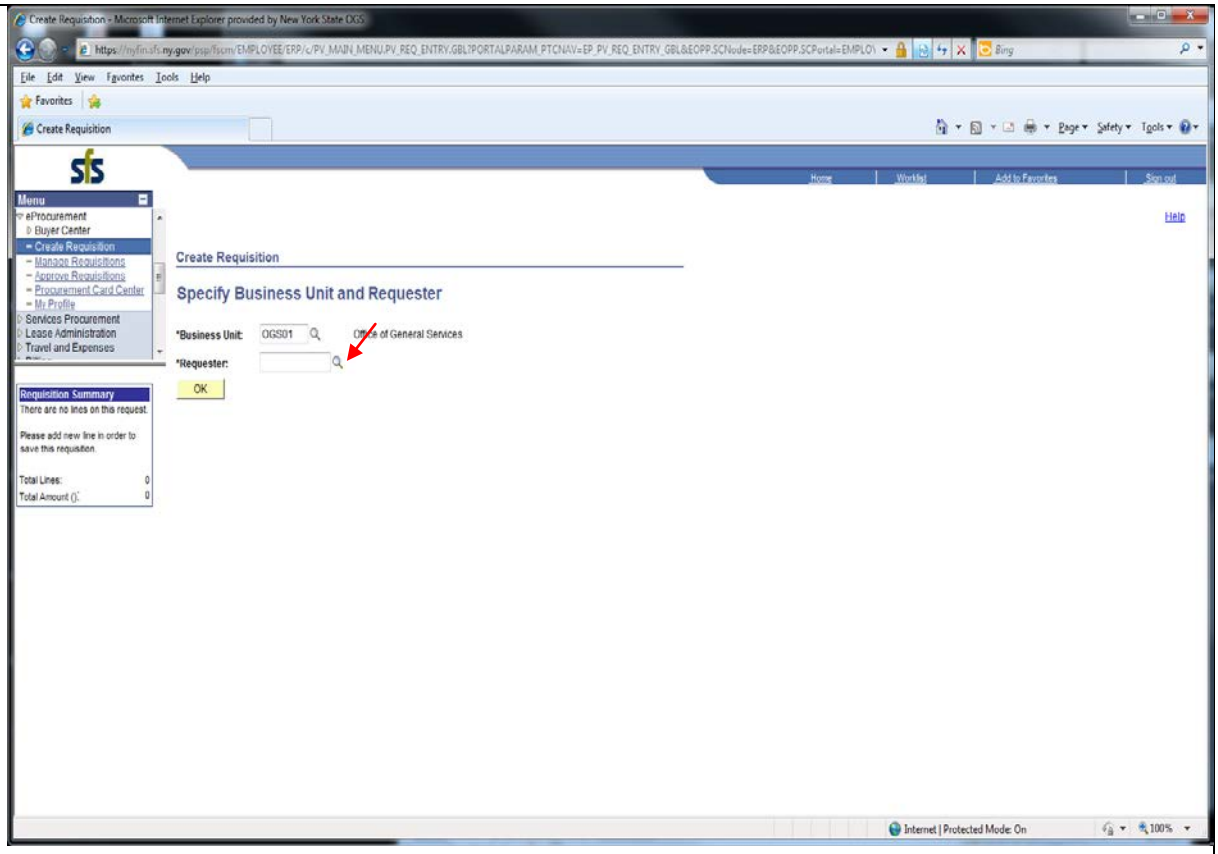
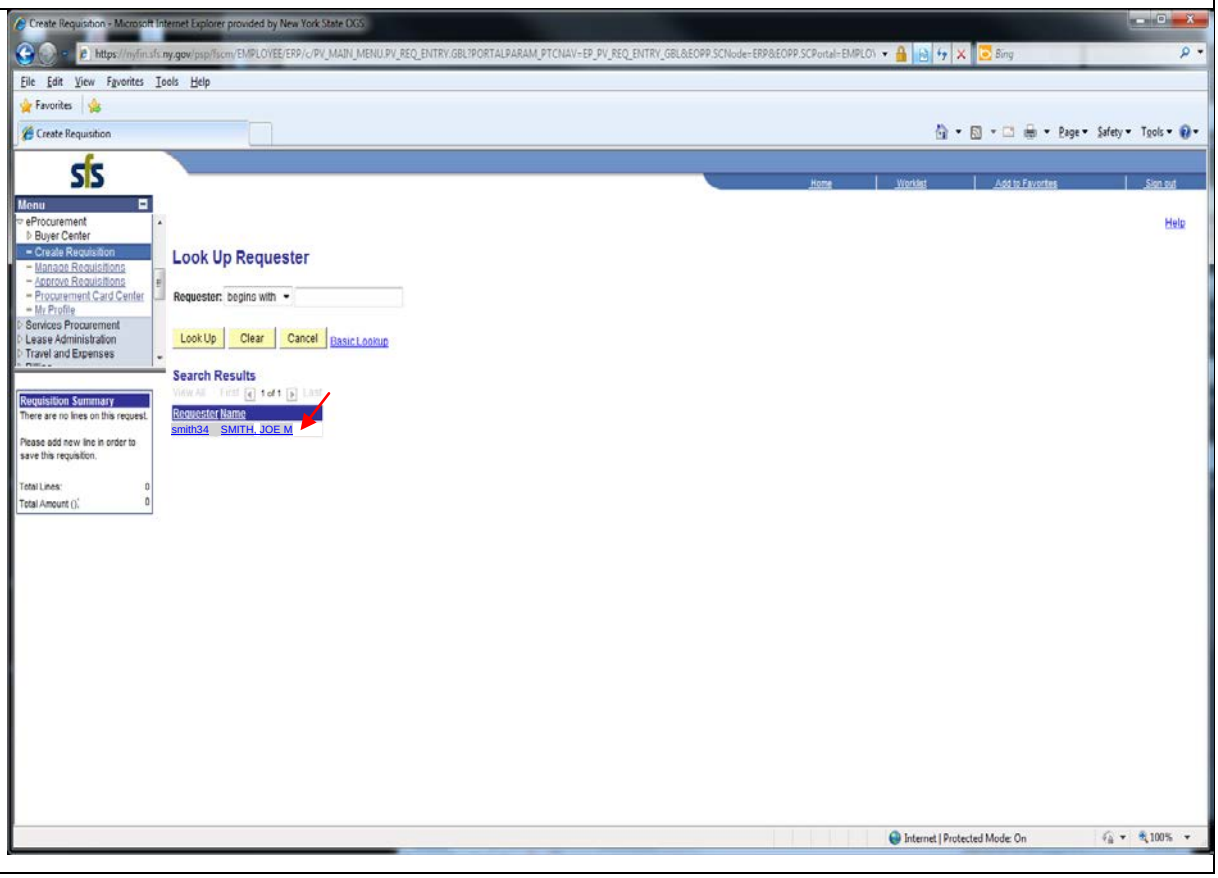
Click Create a Requisition (either location).



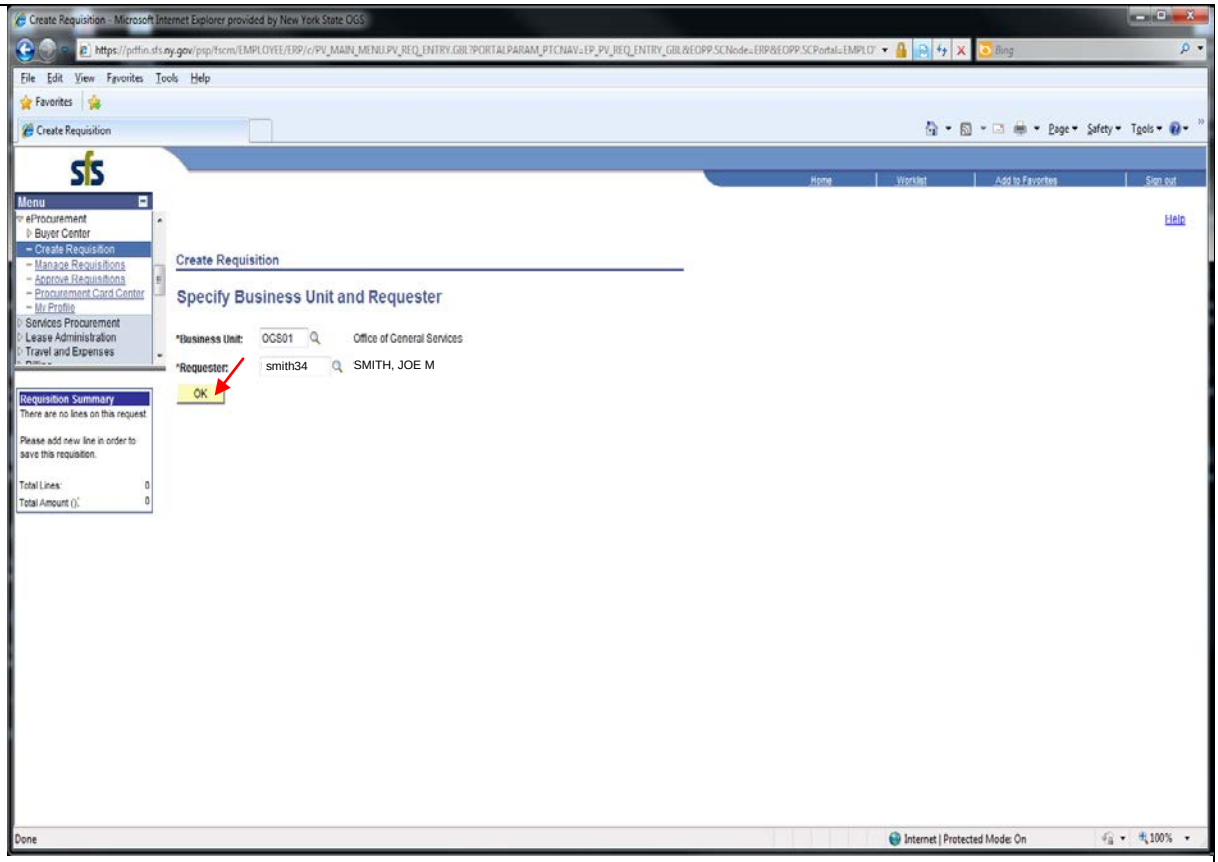
NOTE: Items with * are required.

The Business Unit field automatically populates with your agency.



To fill in the Requester field with the User ID, click on the magnifying glass.	
Select your name, or if you are acting as a proxy, select the person you for whom the requisition is being requested.	

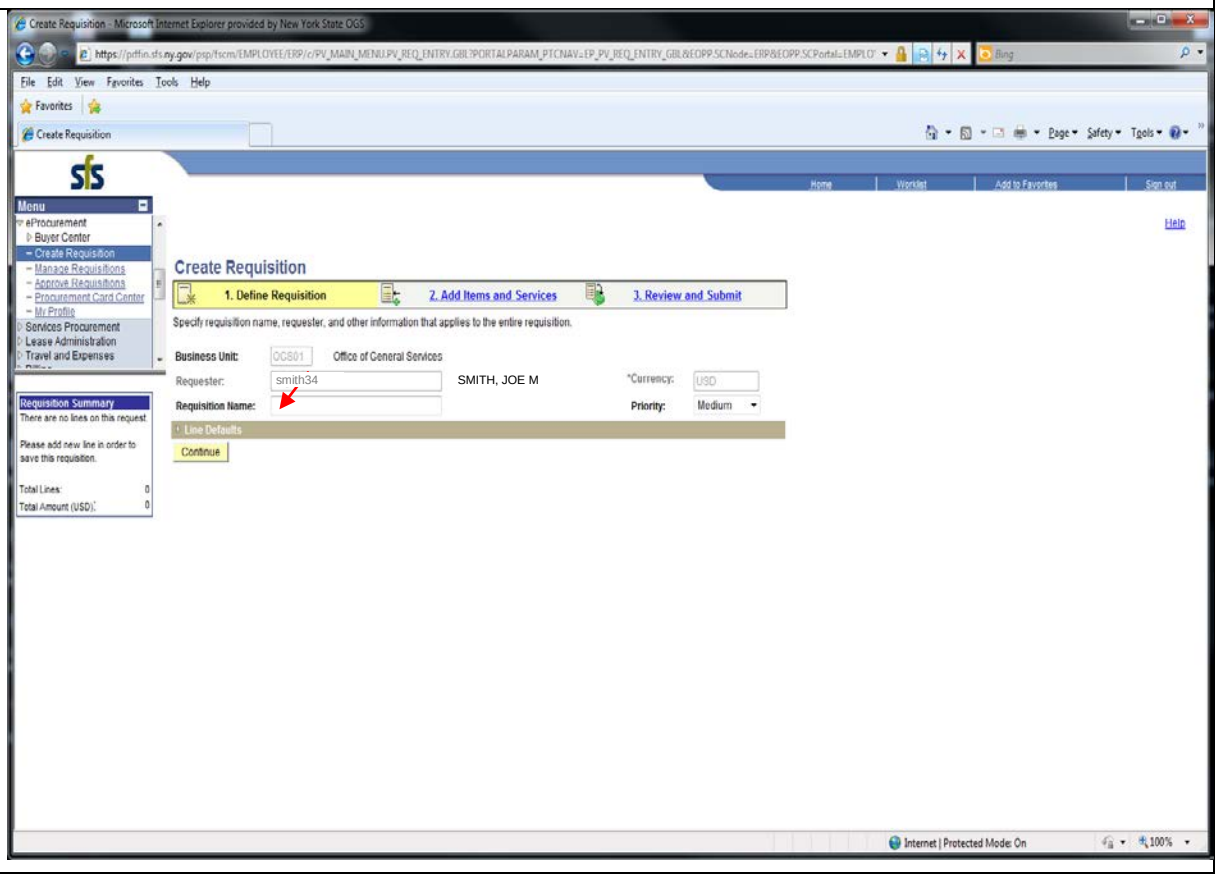
Click OK.

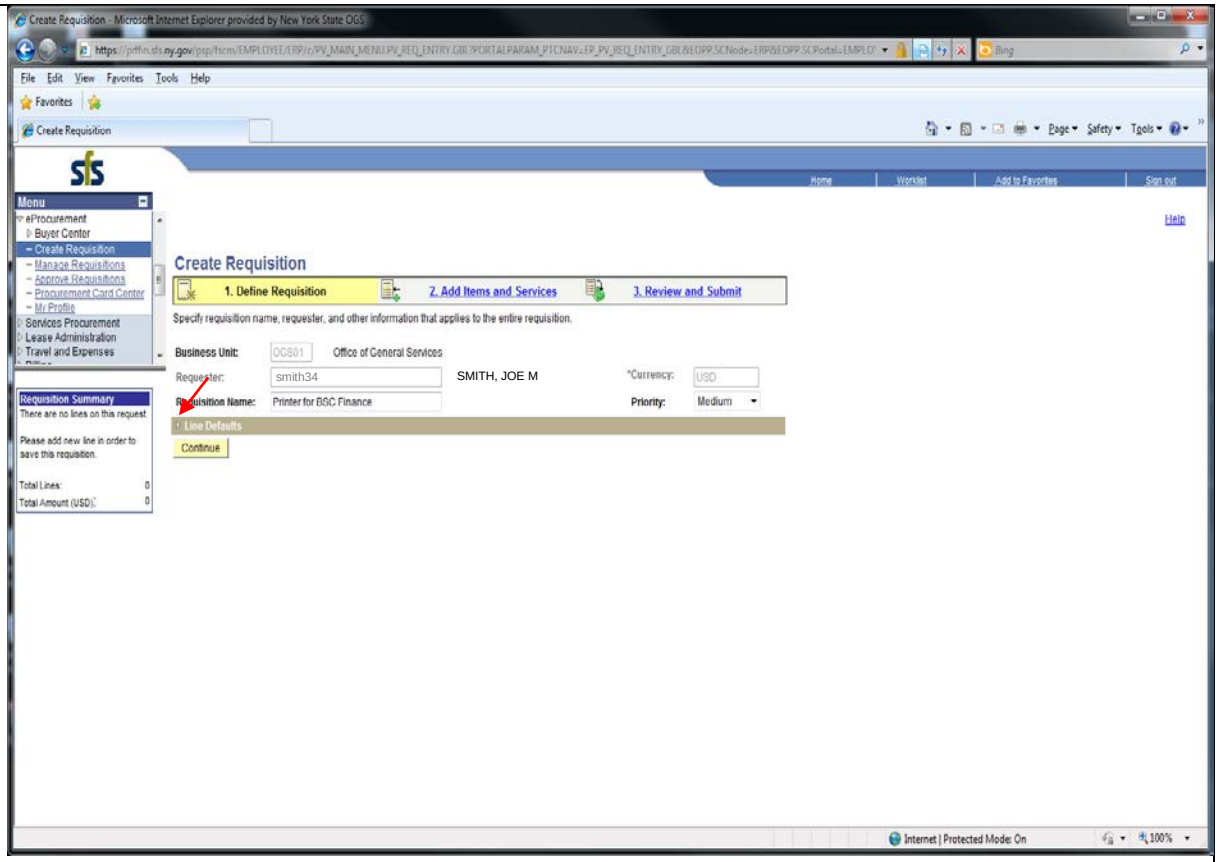
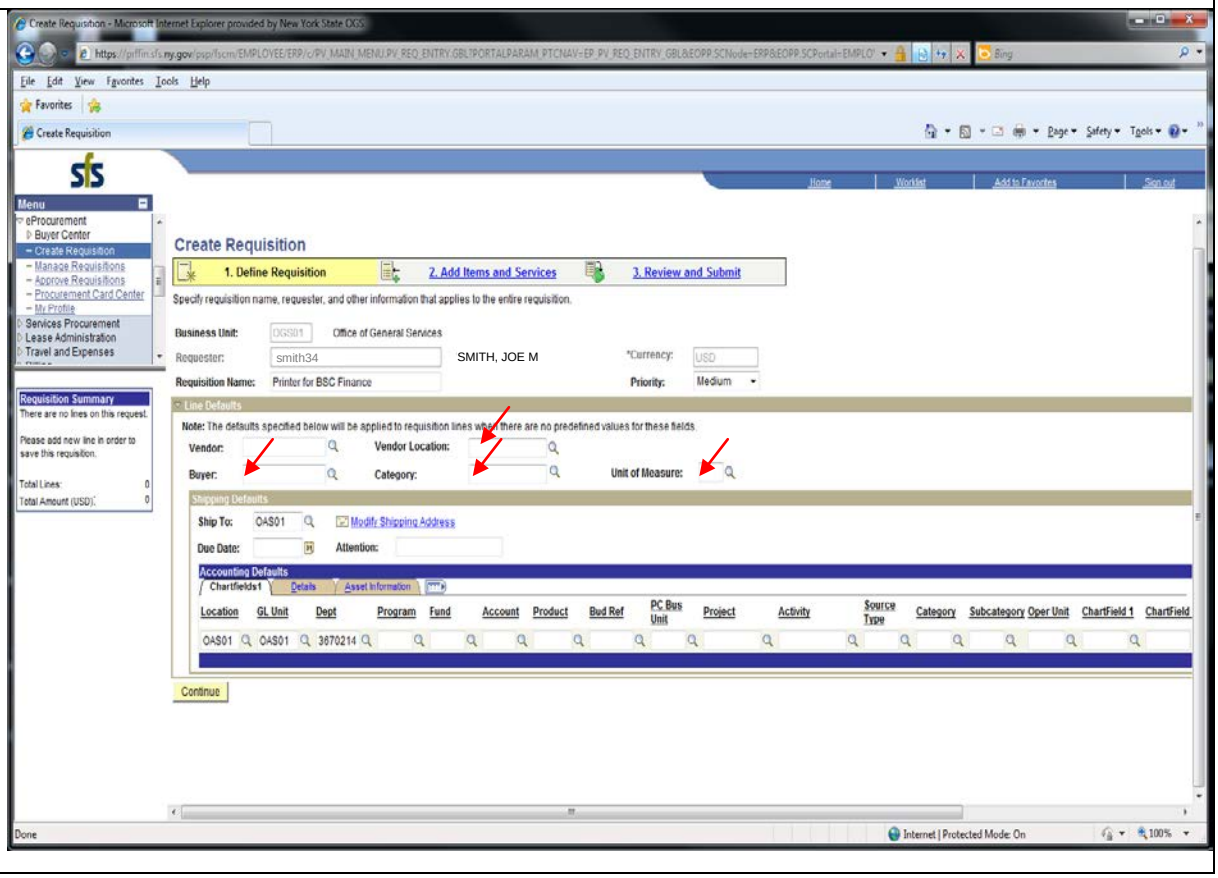


The **Create Requisition** page is used to create and define requisitions.

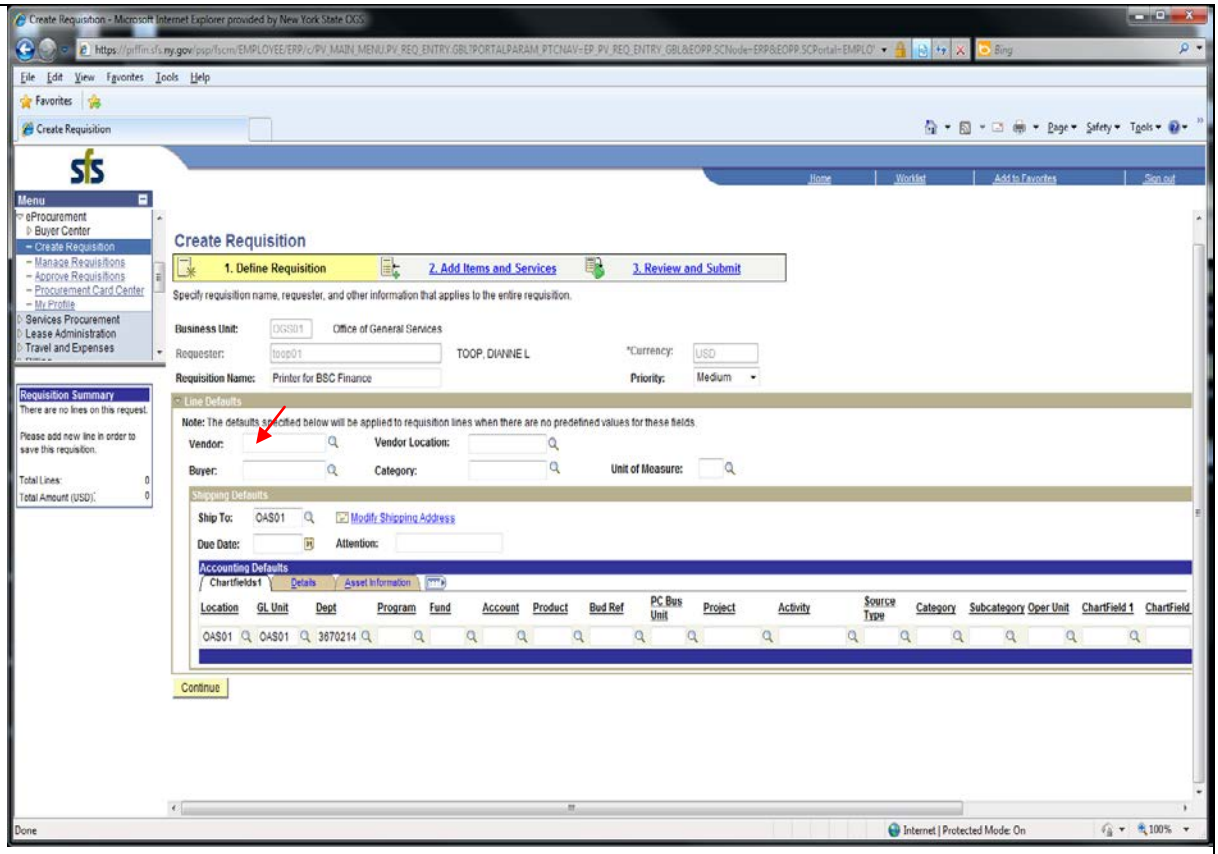
Click the Requisition Name field and enter a name that is simple, yet descriptive.

This is for your reference only. If it is not filled in it will default to the Requisition ID.



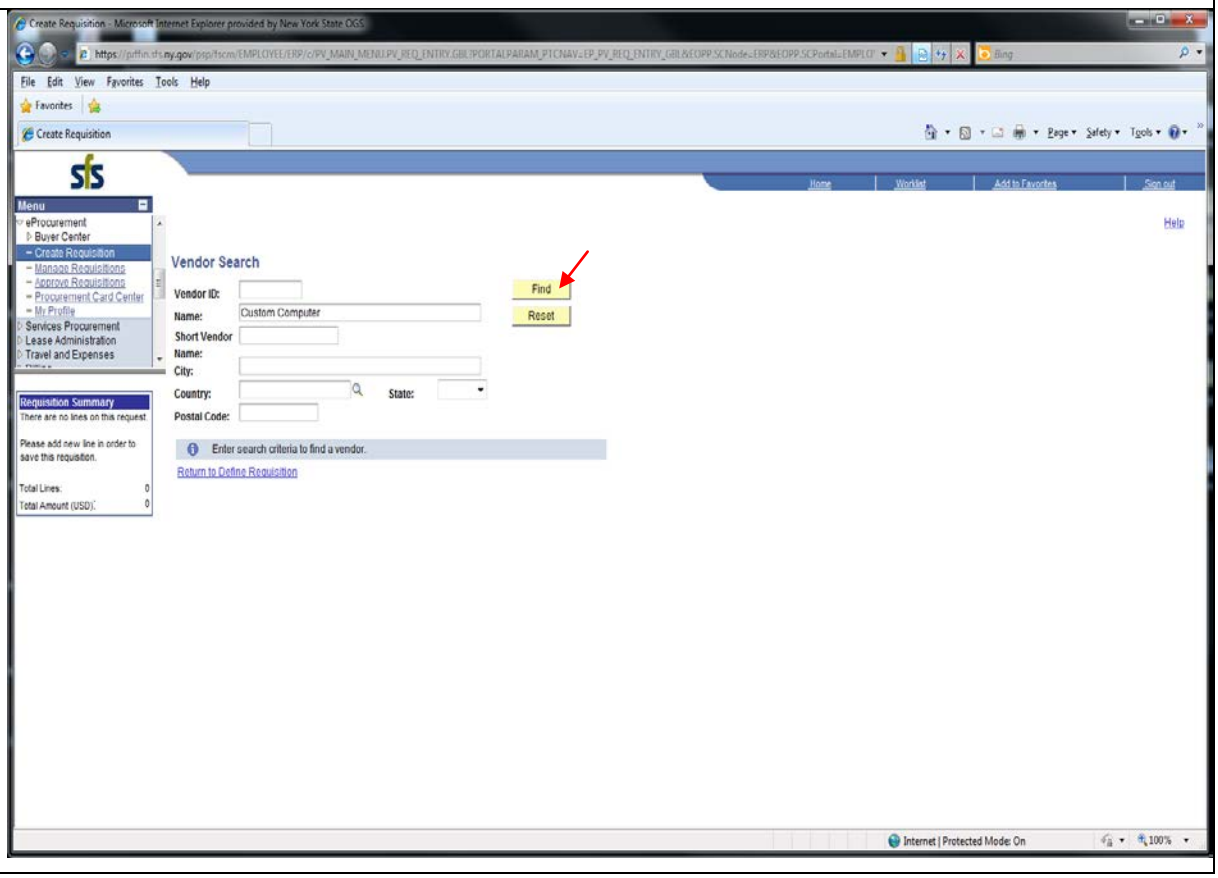
Click the arrow (expand section) next to Line Defaults to open the requisition defaults fields.	
Leave Vendor Location, Buyer, Category, and Unit of Measure blank.	

If all items will be purchased from the same vendor, select the magnifying glass at Vendor.

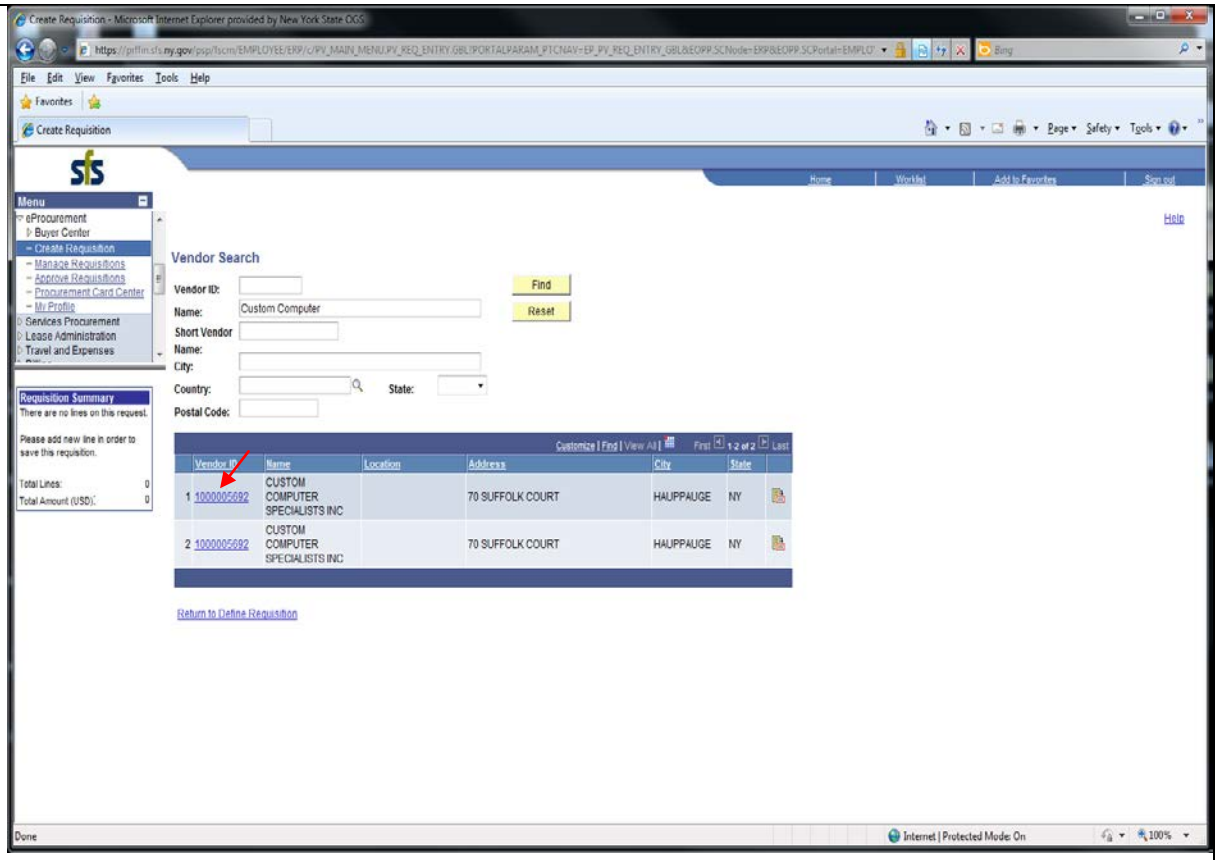


Type in vendor information into any field.

Select Find.



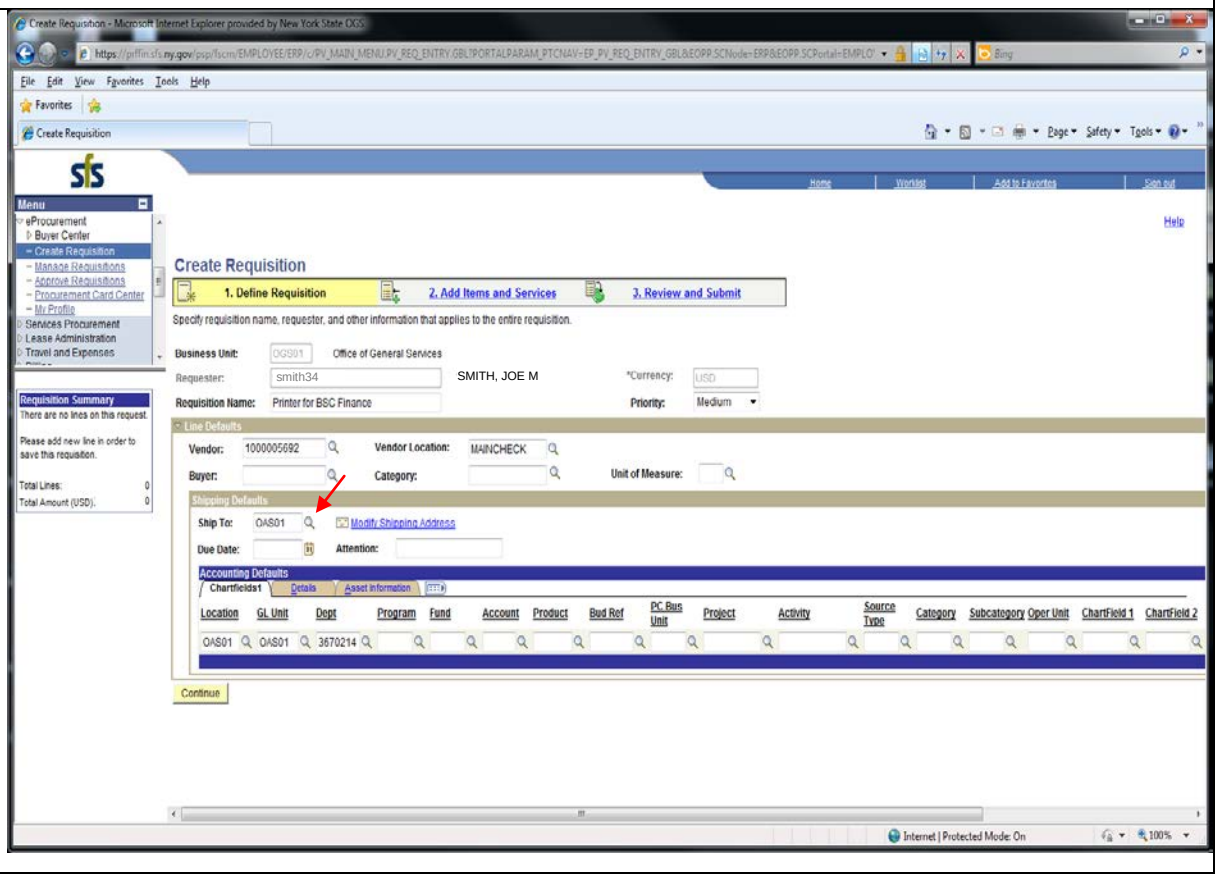
Select the correct Vendor ID.

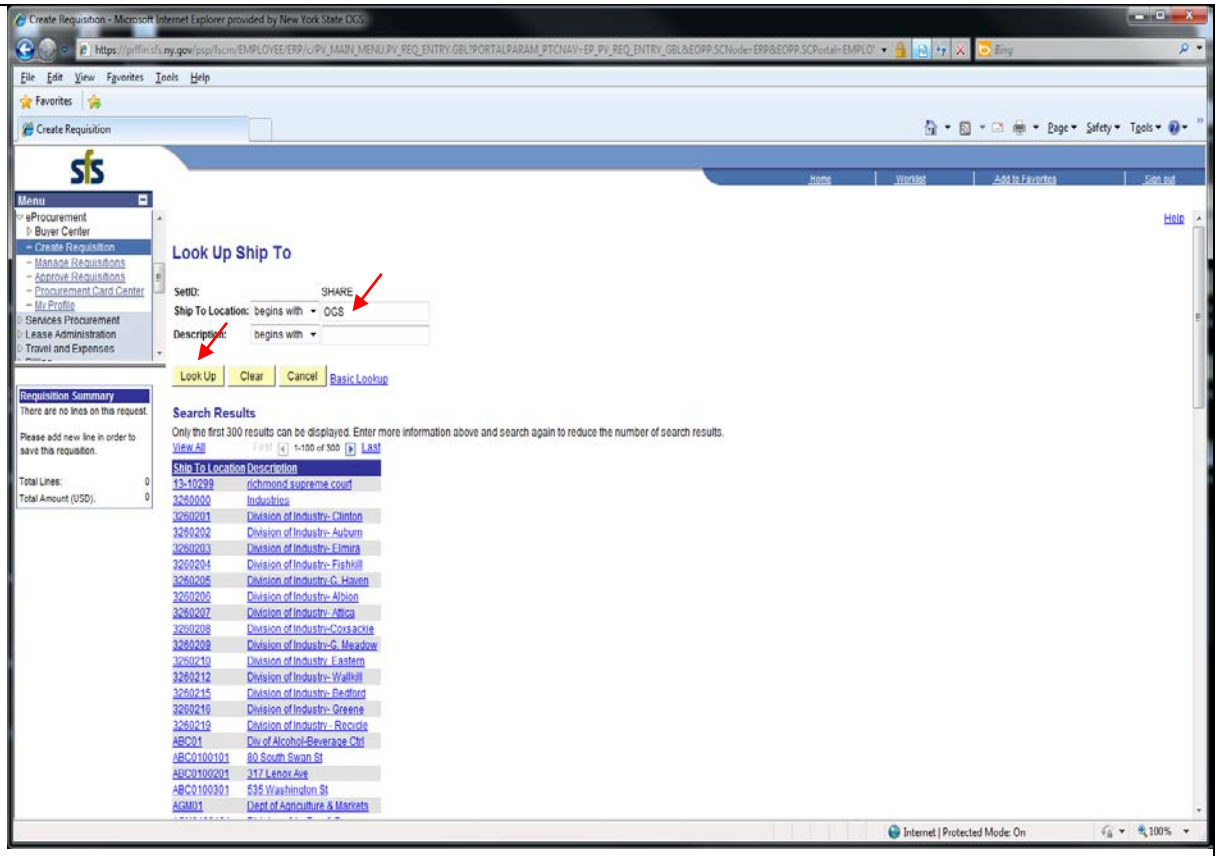
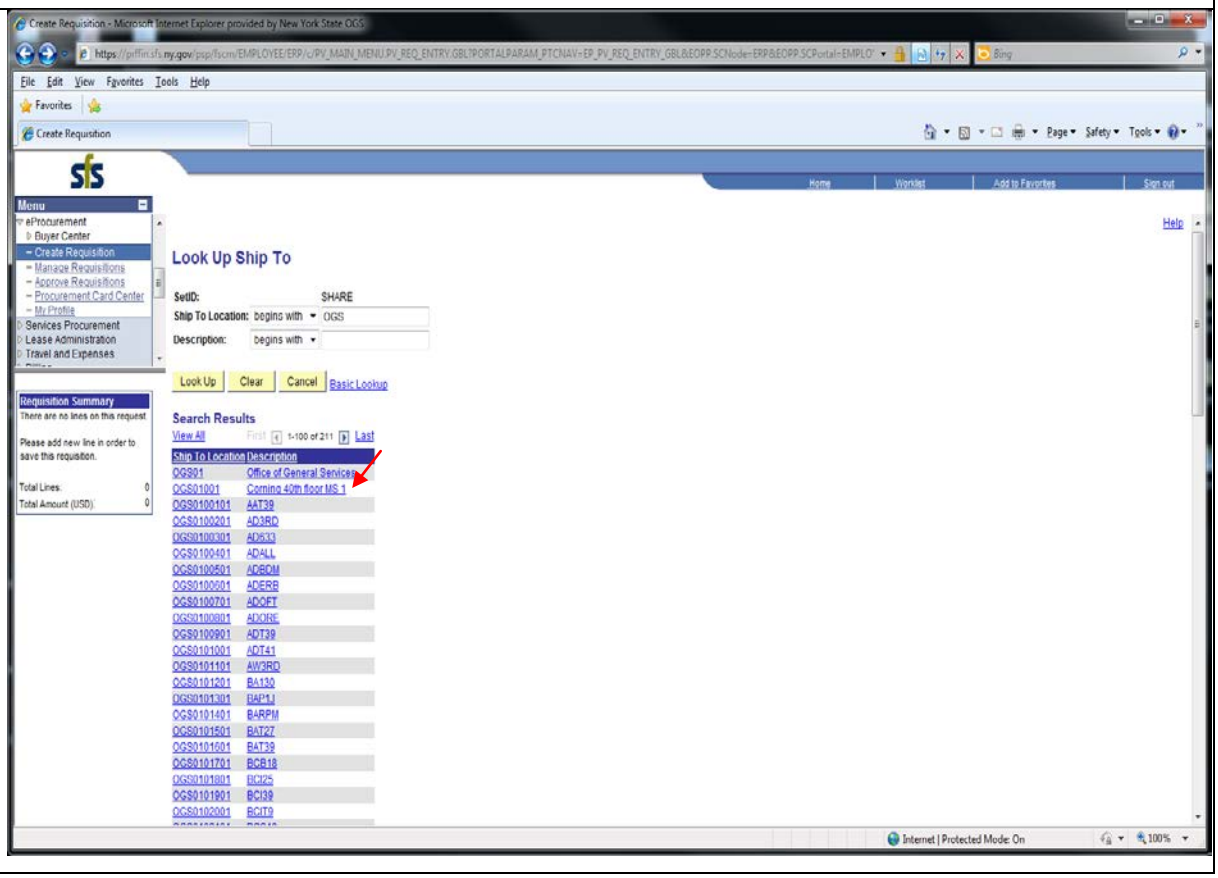


Shipping Defaults

Check your Ship To address. An agency may have multiple addresses in SFS.

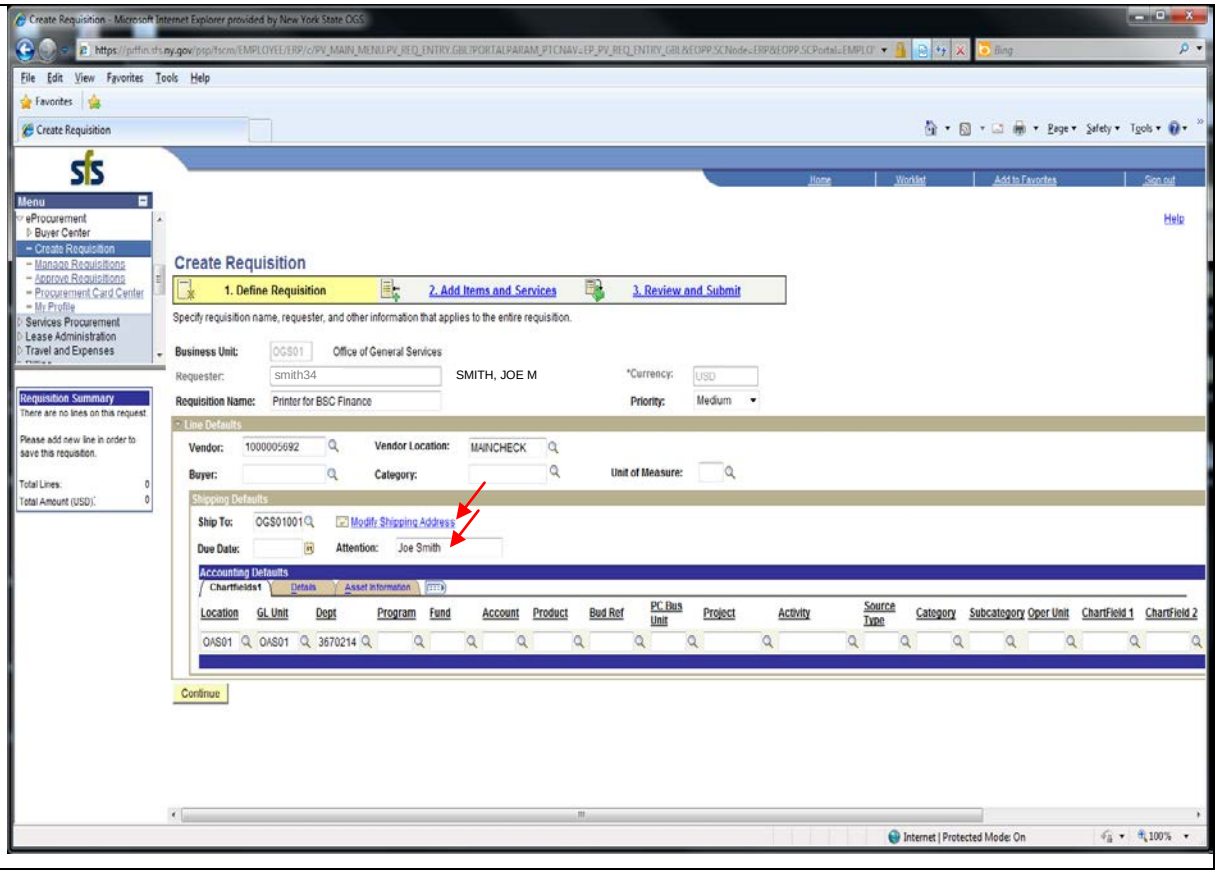
If it is correct, proceed to the next step. If it is not correct, click 🔍 to look up the Ship to information.



Type in Ship To Location and click Look Up.	
Select correct location.	

If the address is not specific enough in the Ship To you can adjust by clicking Modify Shipping Address.

Fill in the Attention field, if known.

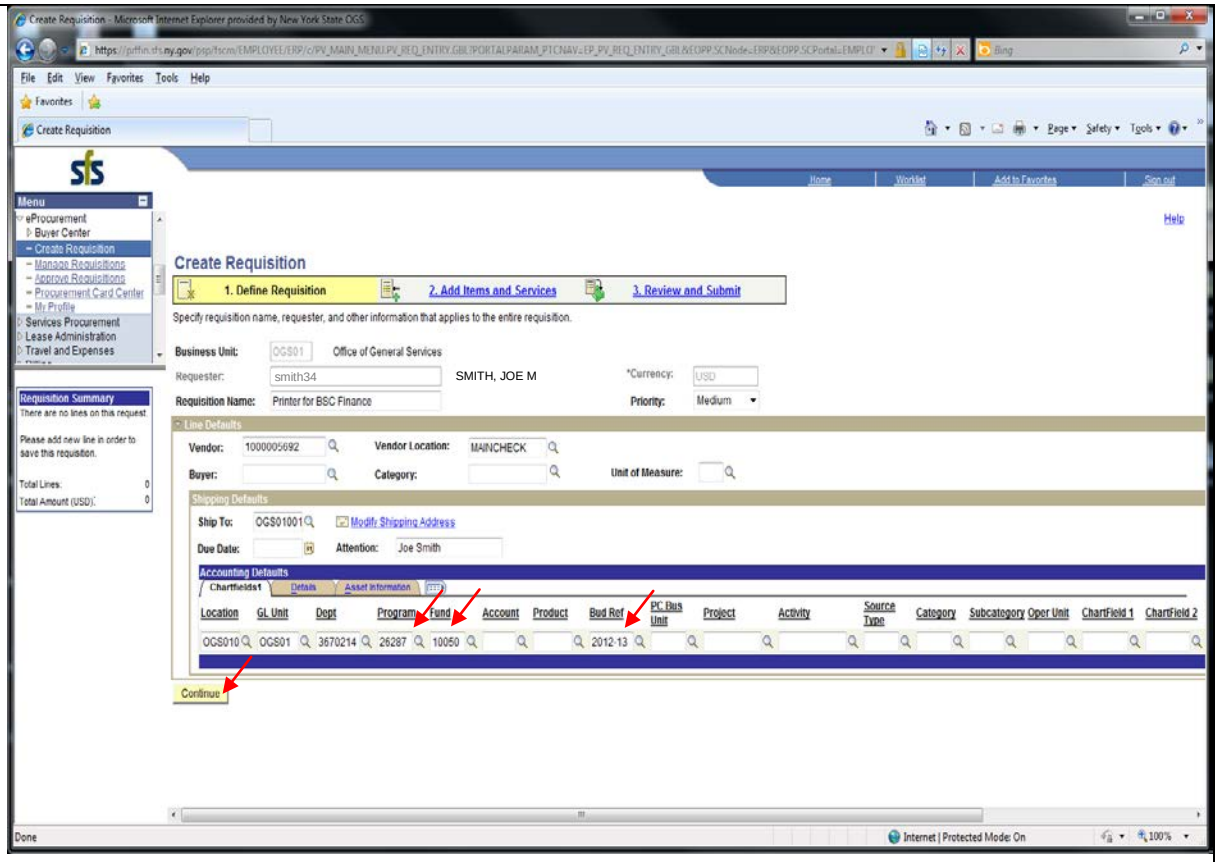


In the **Accounting Defaults – Chartfields1** the **Location, GL Unit,** and **Department** auto-populate.

ChartFields are codes used to categorize financial and budget transactions.

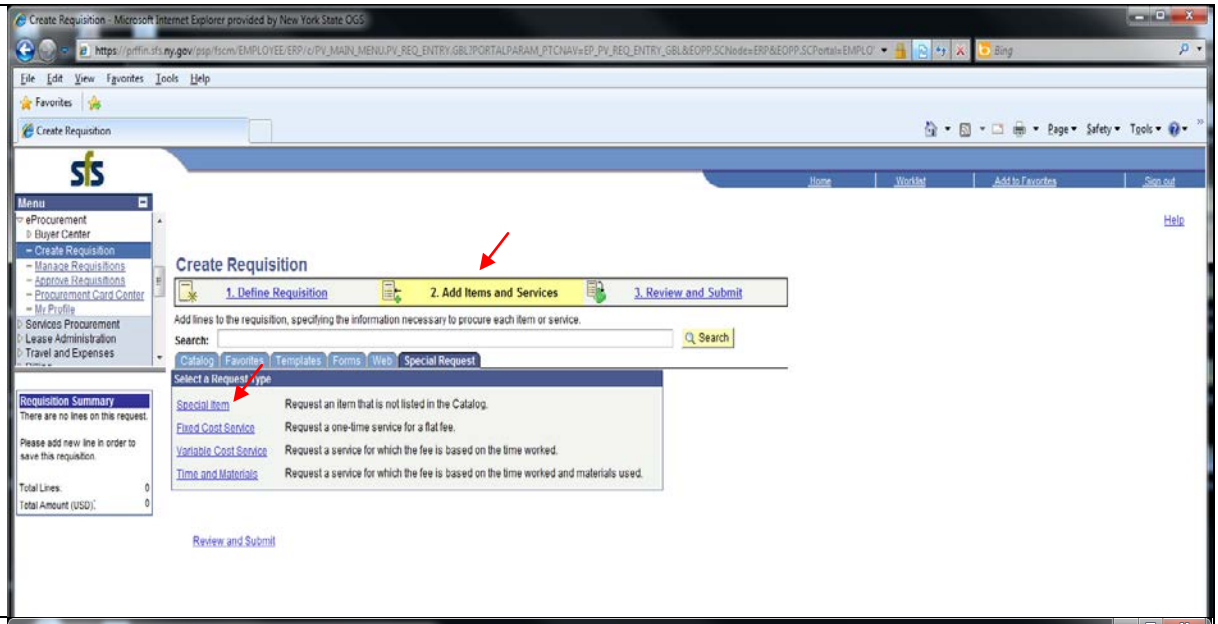
Fill in the Program, Fund, Budget Reference, and other fields as required. If you are unsure of your coding, contact your budget office. Click Continue to add items and services.

NOTE: Budget Reference *must* be filled in or requisition will kick out. Budget Offices sometimes do not include the year in their coding string.



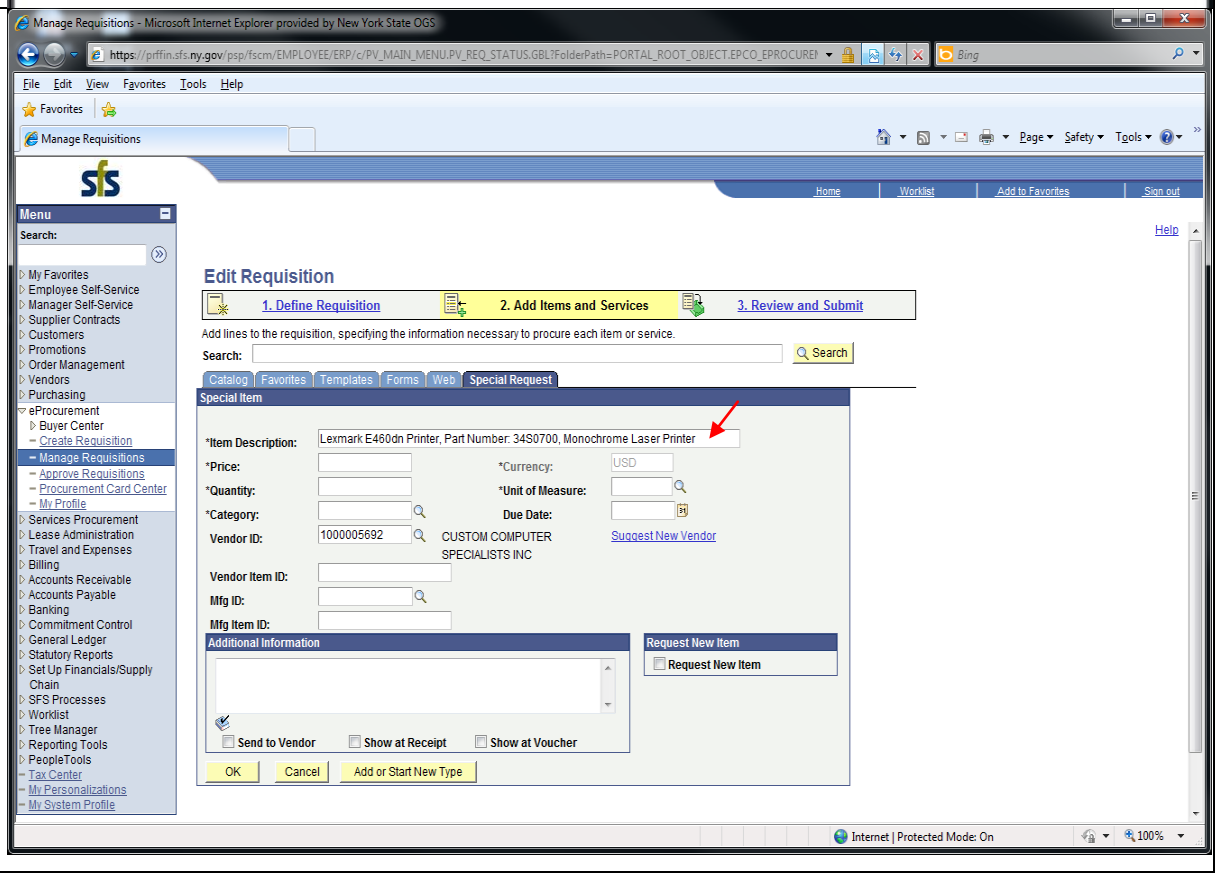
You are now in the second step of the Create Requisition process, where you will add items and services.

Click Special Item.



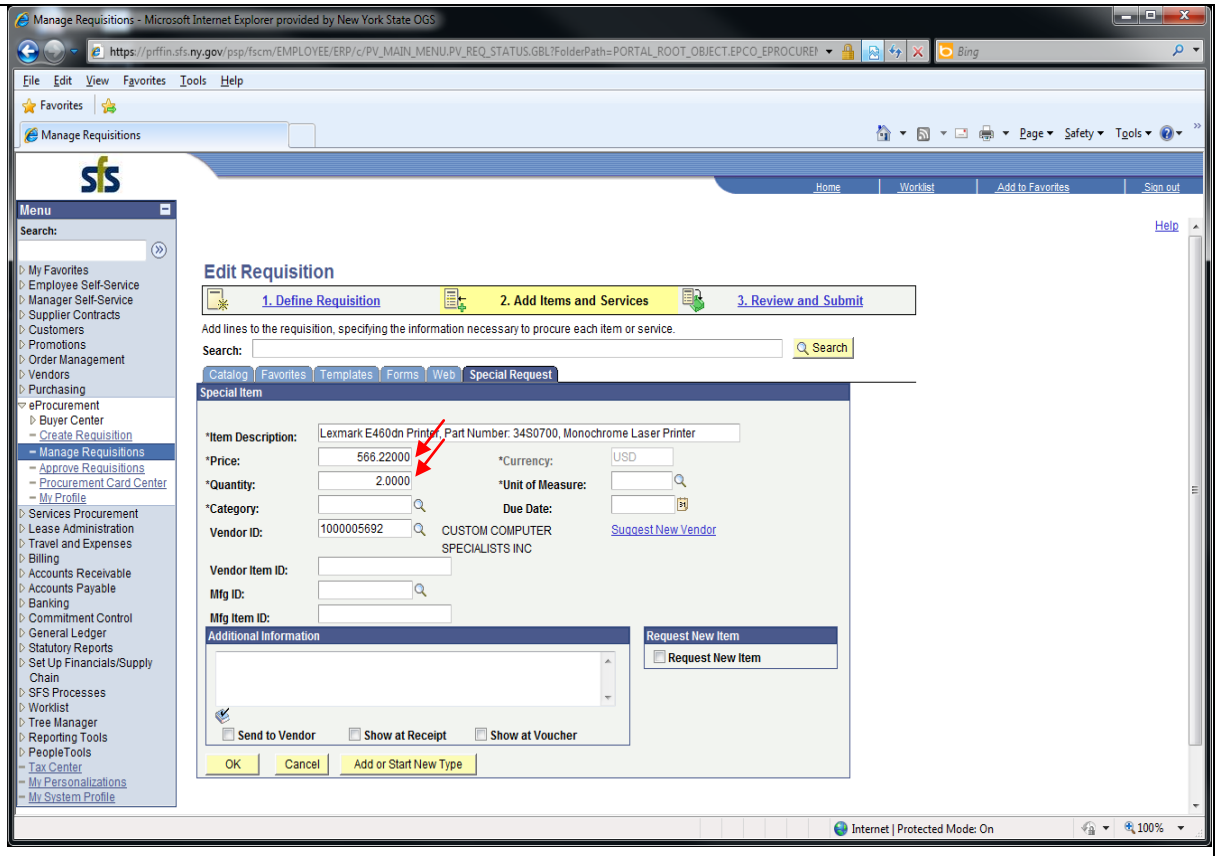
Fill in the Item Description. The Item Description field is used to enter a *complete* description of the item including:

- Mfg. Item Number
- Item Details (color, style, etc.)
- Region Number
- Hourly Rate
- Etc.

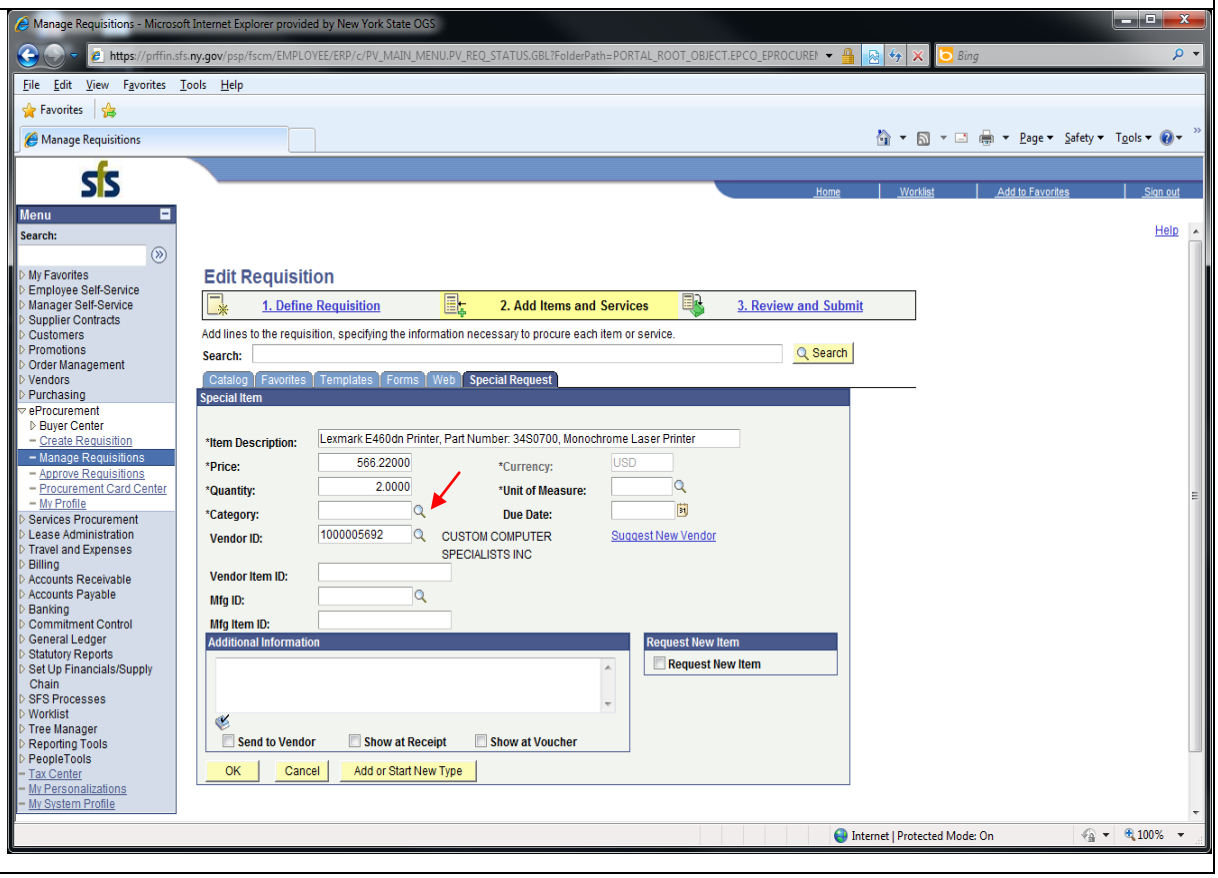


Fill in Price and Quantity fields.

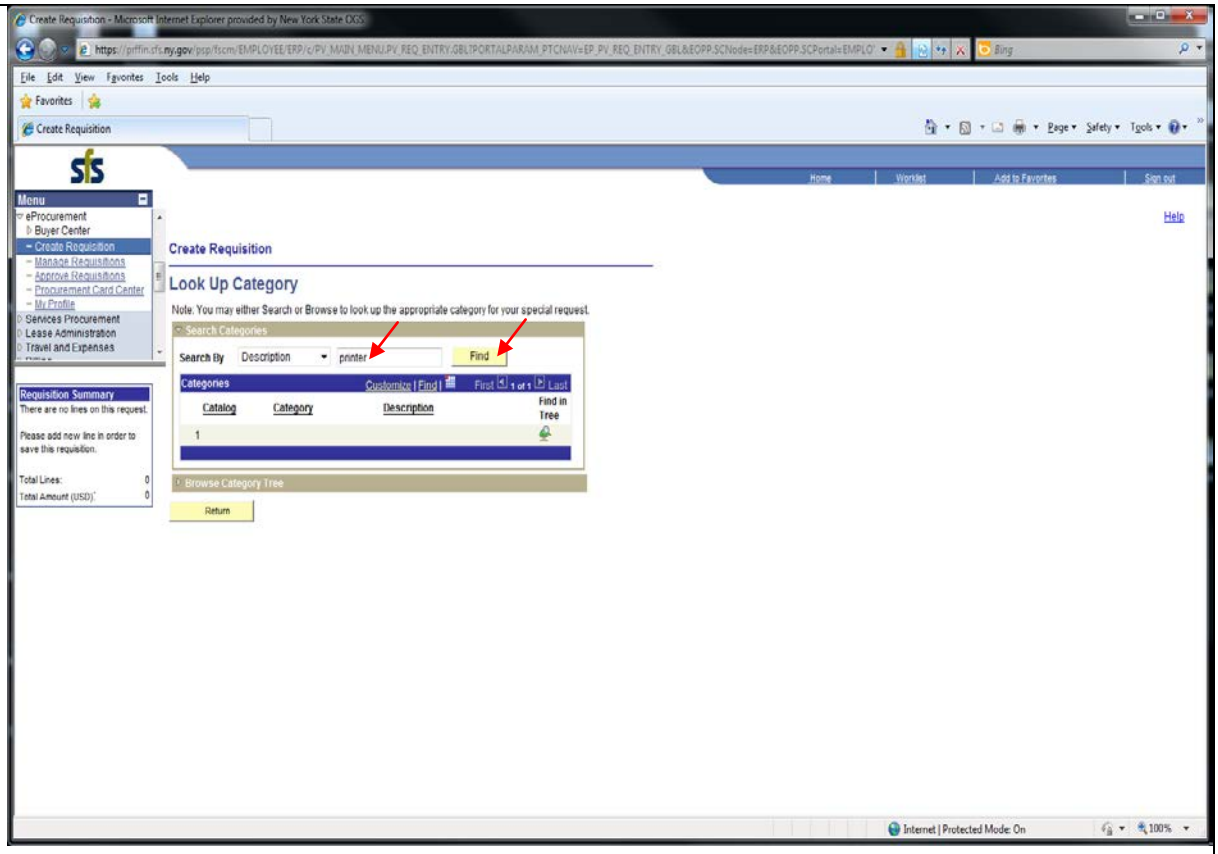
If this is blanket requisition to cover multiple purchase orders, the price and quantity need to be reversed. If you need advice, please call the BSC at 457-4272, option 1, option 1.



Fill in Category number. If you do not know the number, click 🔍 to open a lookup window for the category.

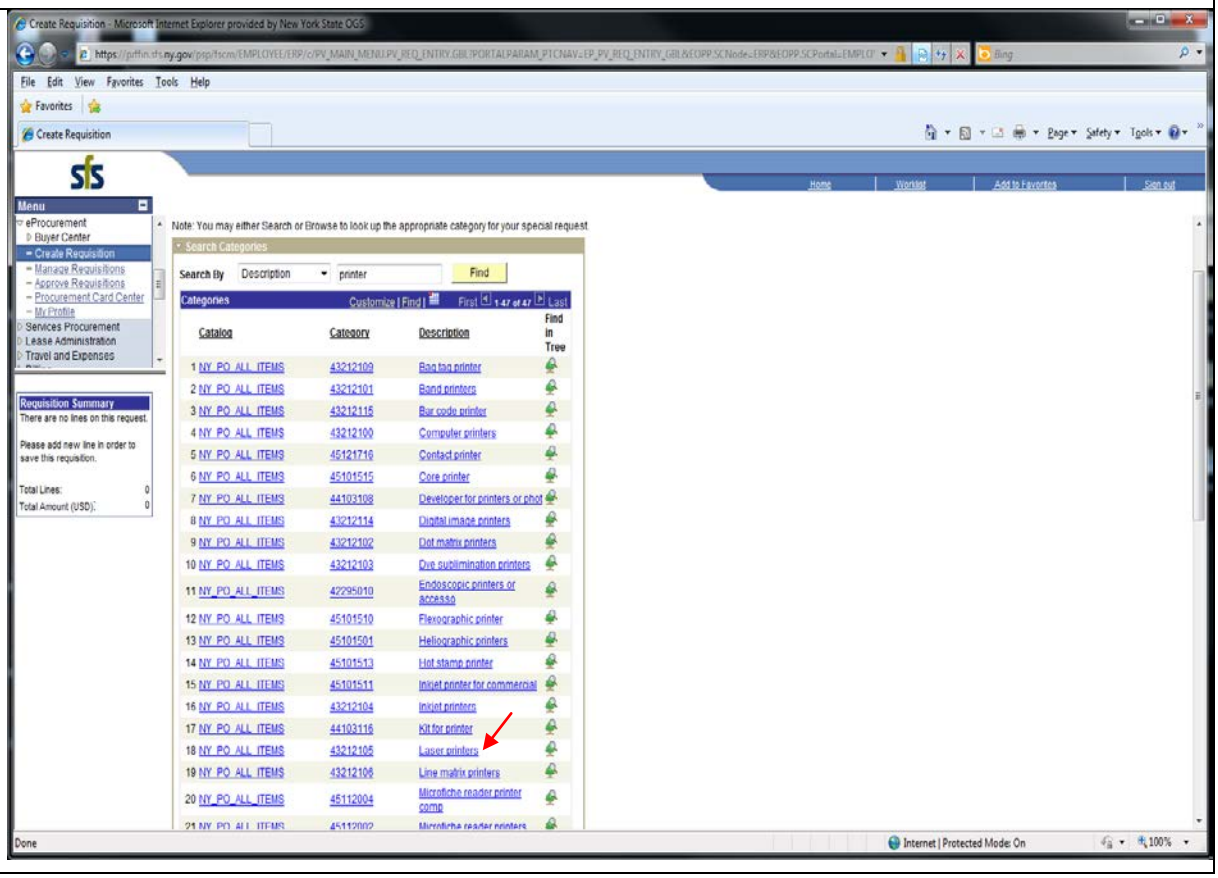


Type in a description of the item and click Find.



Click on the Description head to sort the items alphabetically.

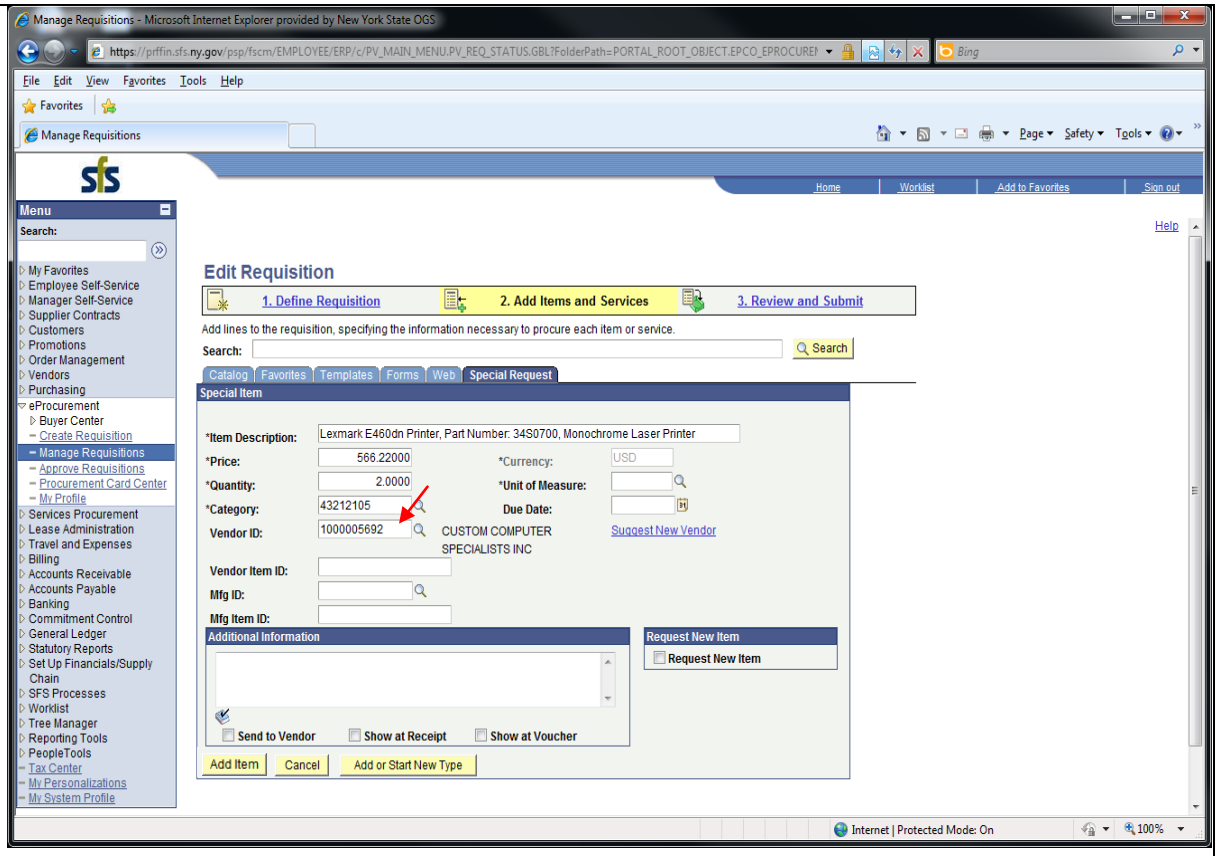
Select the correct item. Once you have selected it, you will return to the main window.



Note that Vendor ID came over from the default page.

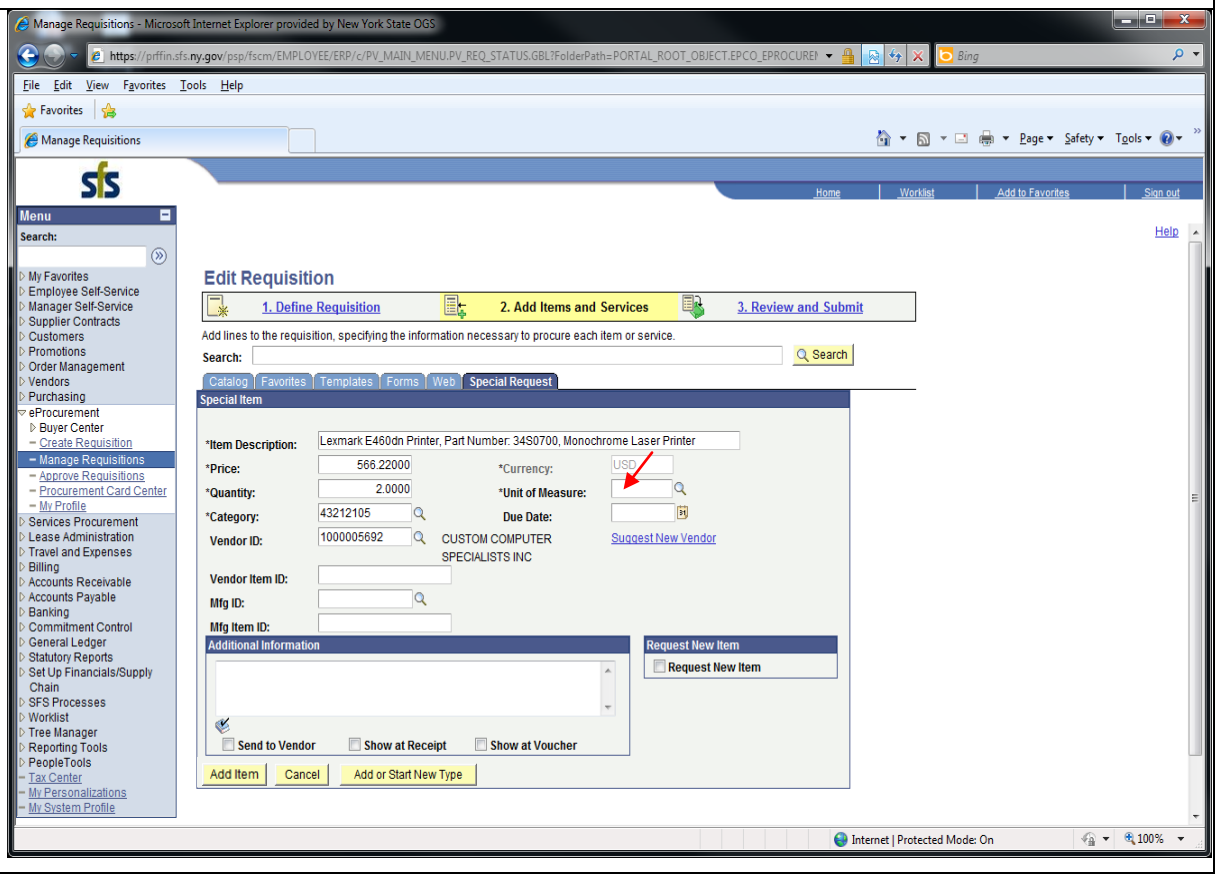
Requisitions *must* include a vendor.

If the vendor needs to change, the BSC will contact you for approval first.



Fill in Unit of Measure.

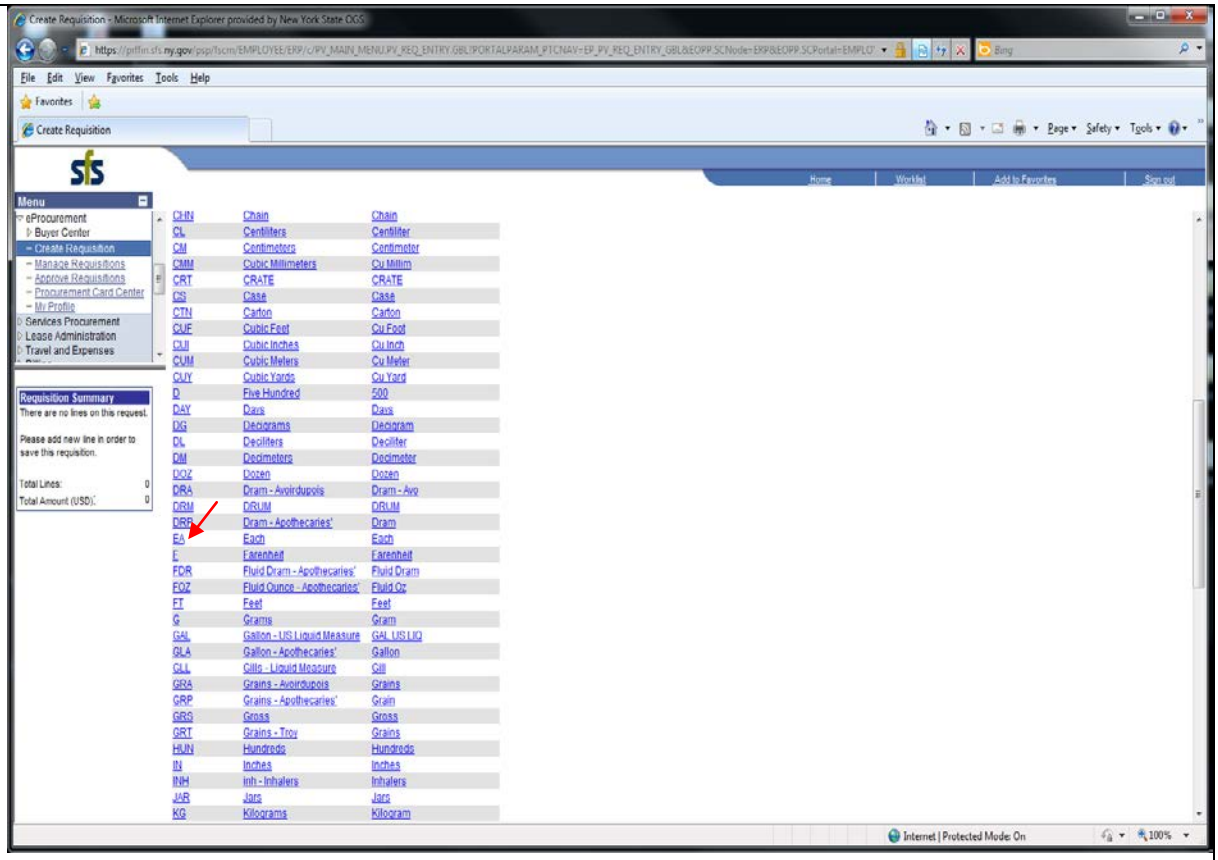
Click 🔍. If you do not know the unit of measure, use EA.



Select the correct unit.

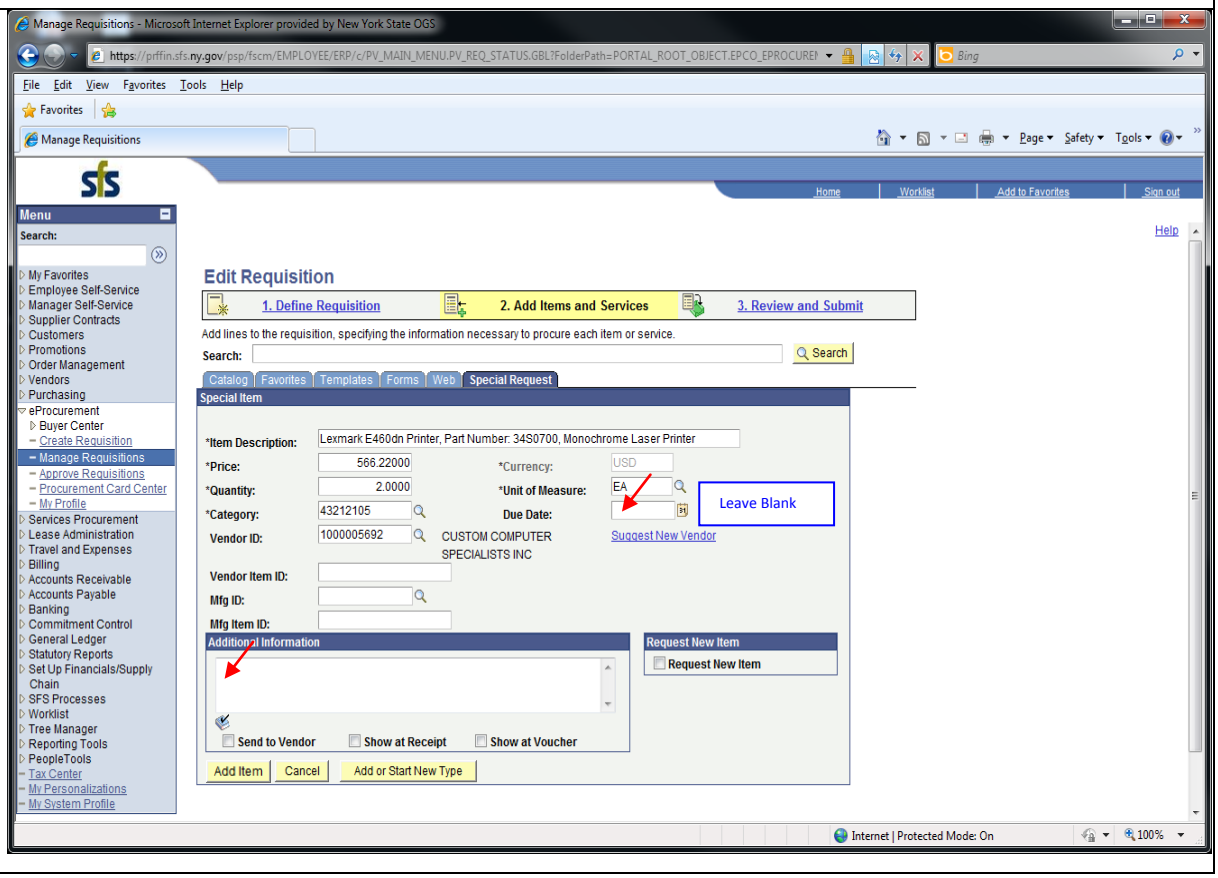
NOTE: BSC cannot change this selection.

If you need advice, please call the BSC at 457-4272, option 1, option 1.



Leave Due Date blank.

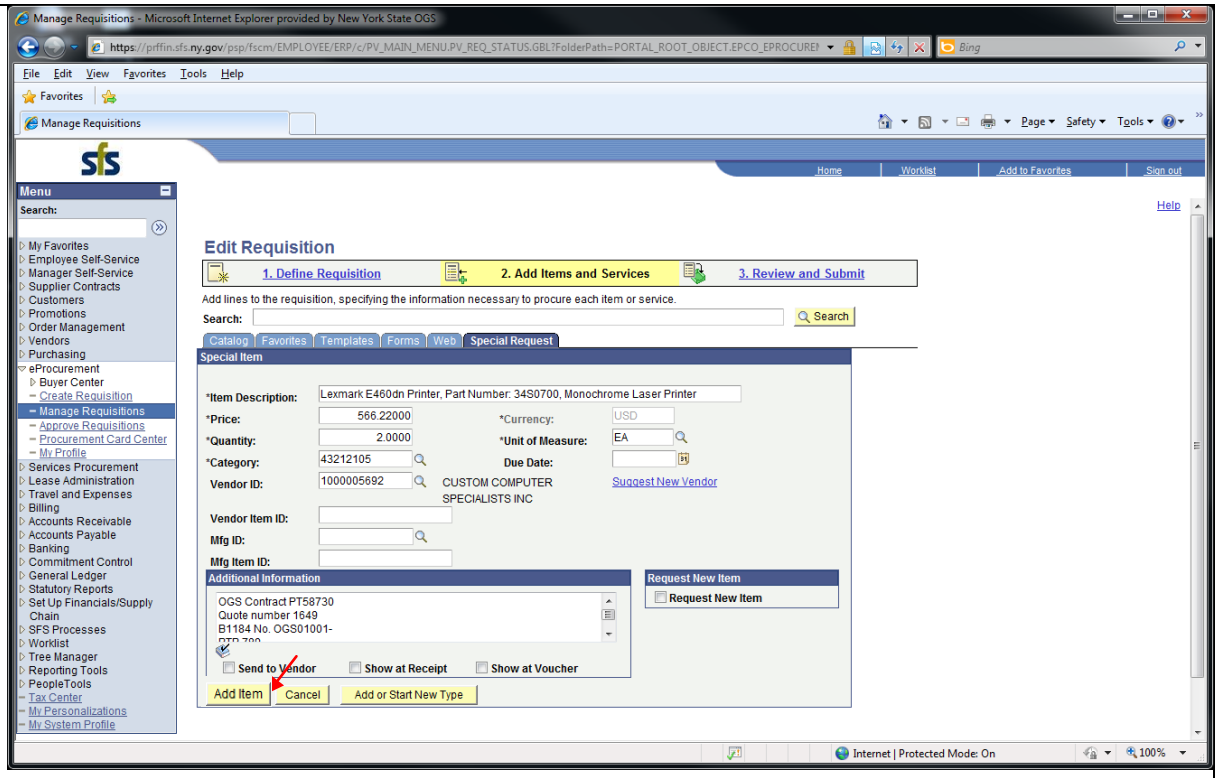
If an item is needed by a certain date, add to Additional Information.



In Additional Information, add applicable information including:

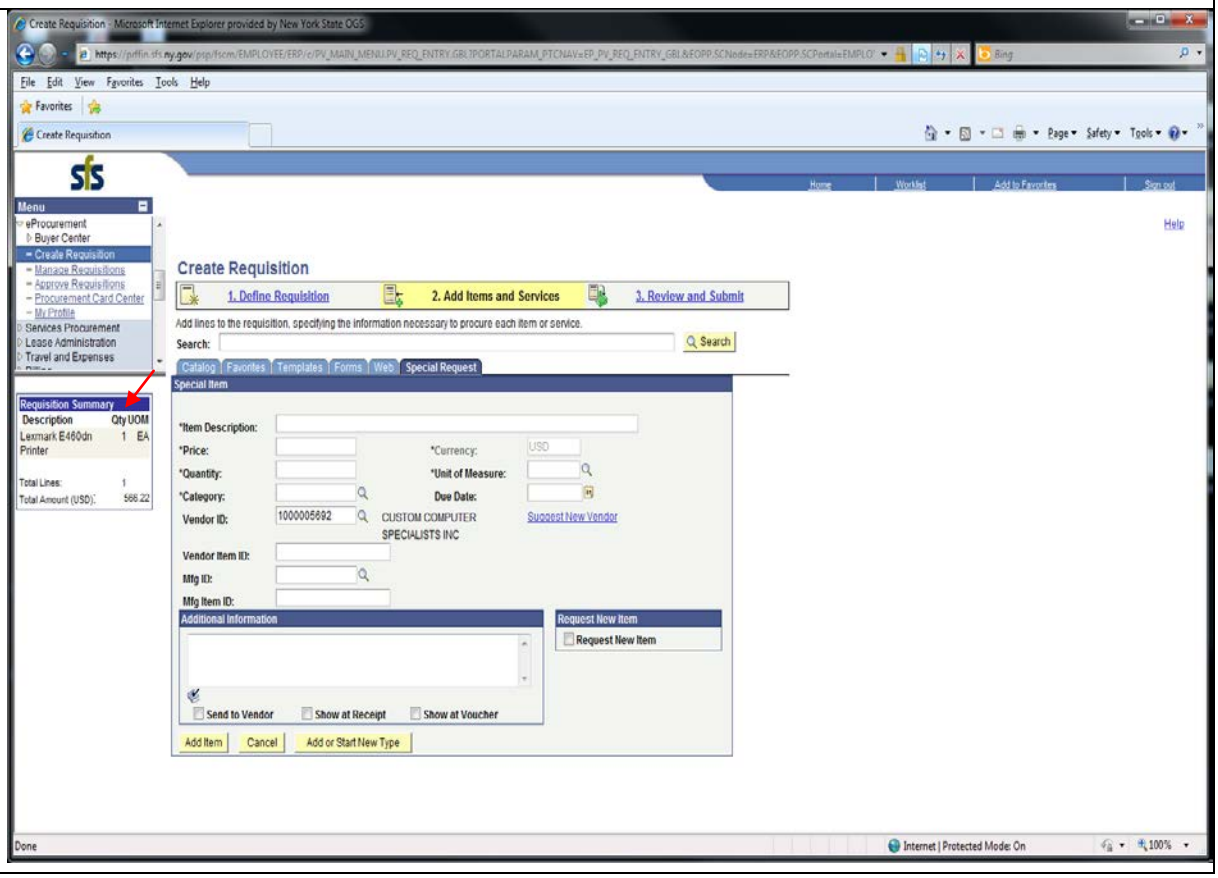
- Contract Number
- Quote Number
- B-1184 Number
- PTP Number
- Buy Desk
- Discount Rate for paying early
- Due Date

Click Add Item.

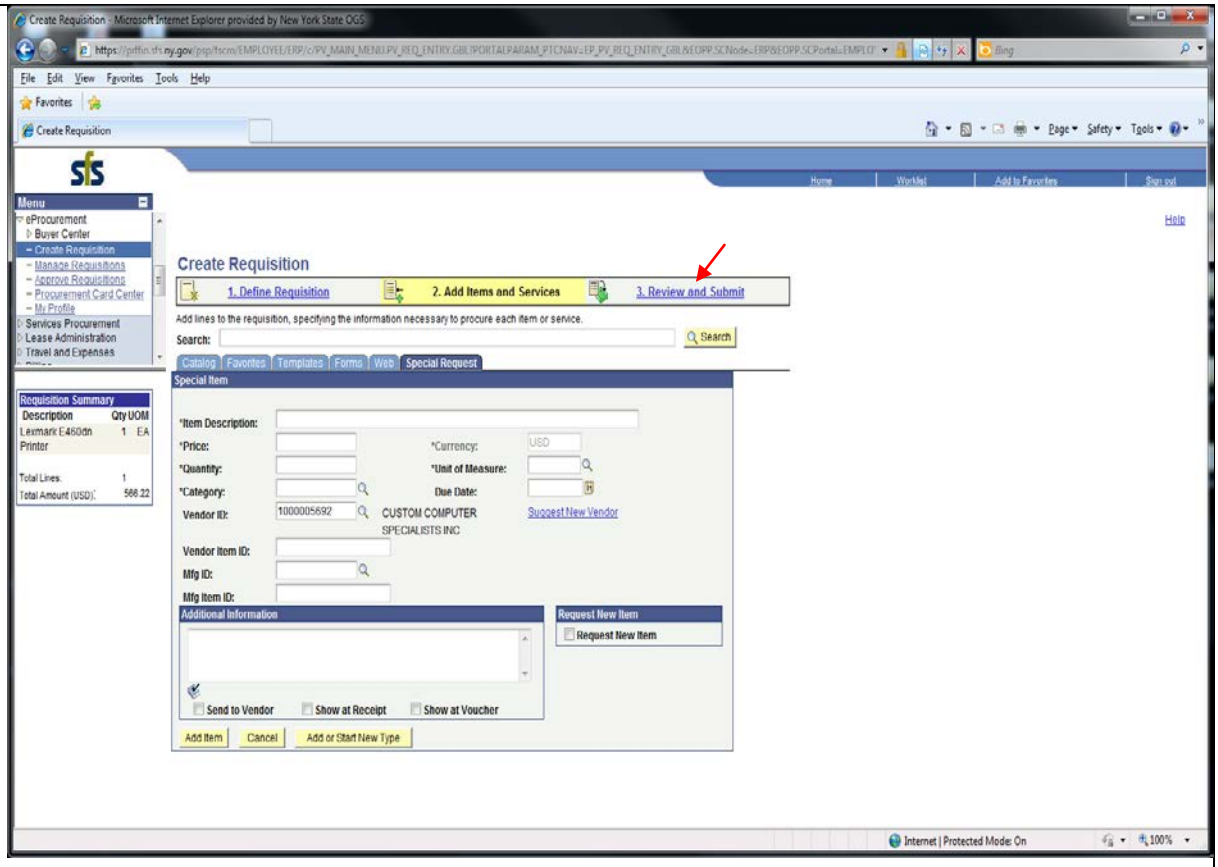


In the same manner, add all other items to be purchased.

Located on the left side bar, **Requisition Summary** will give you a summary of the requisition as it is completed.

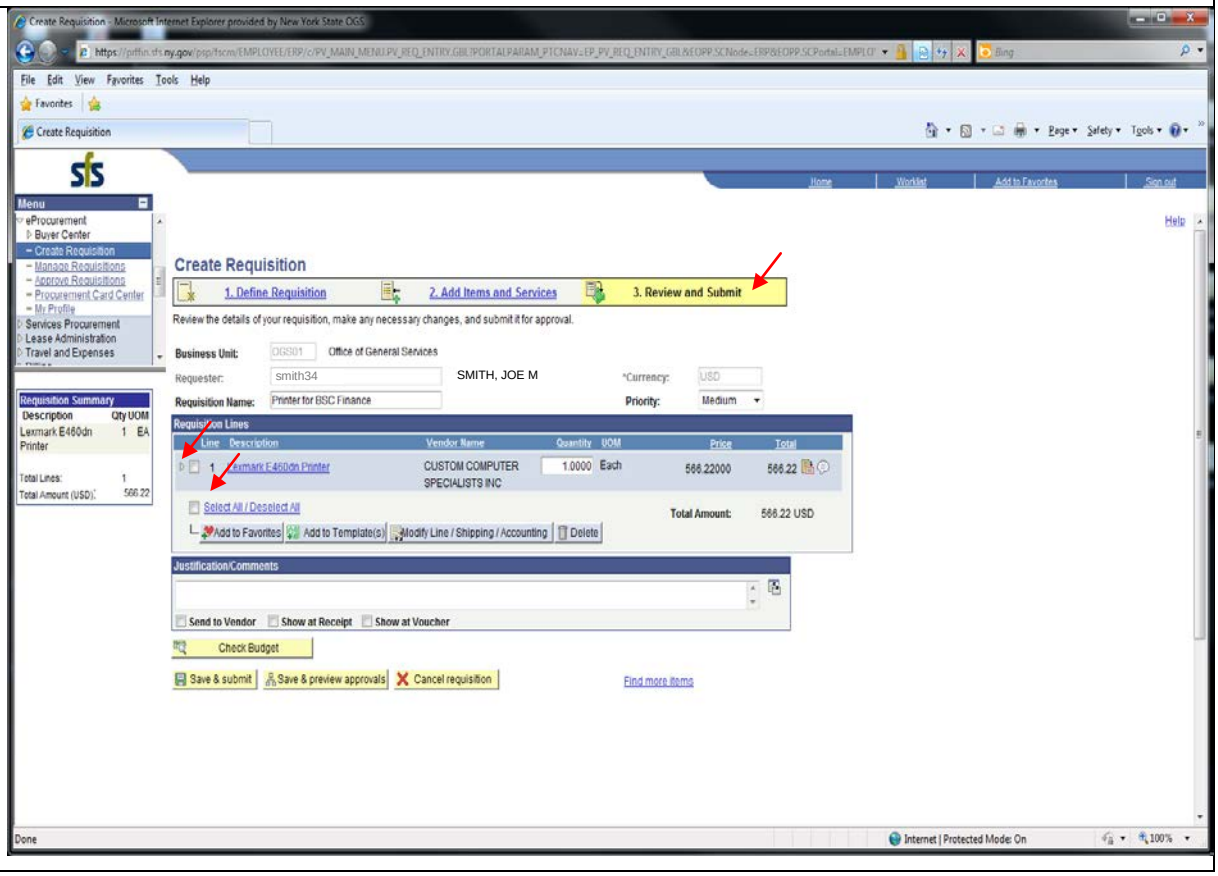


When you are finished adding items and services to your requisition, click Review and Submit.

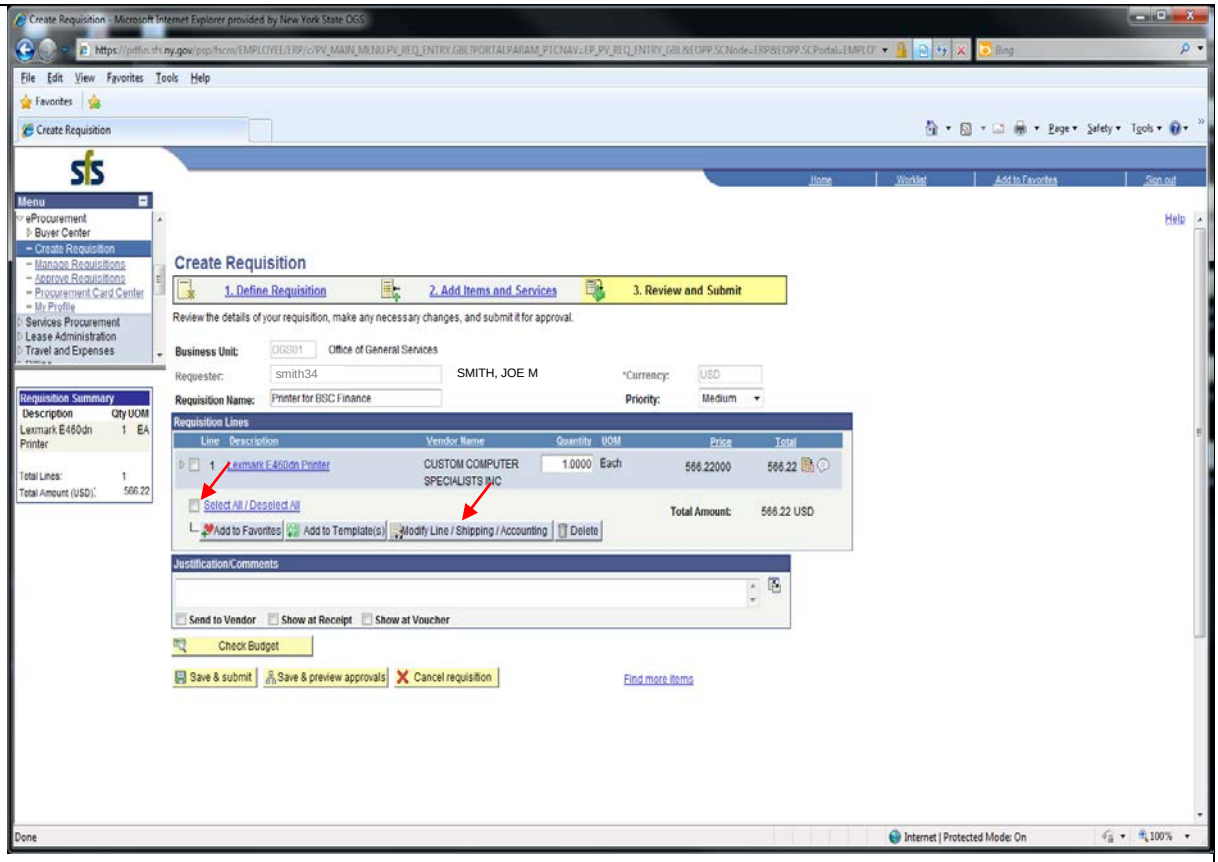


The **Review and Submit** page contains a summary of the requisition. This page is used to review the items entered. Individual lines can be modified (see bottom of page 20) or select all to modify all lines at once. Make any necessary changes to produce an accurate requisition.

Click the arrow (expand section).

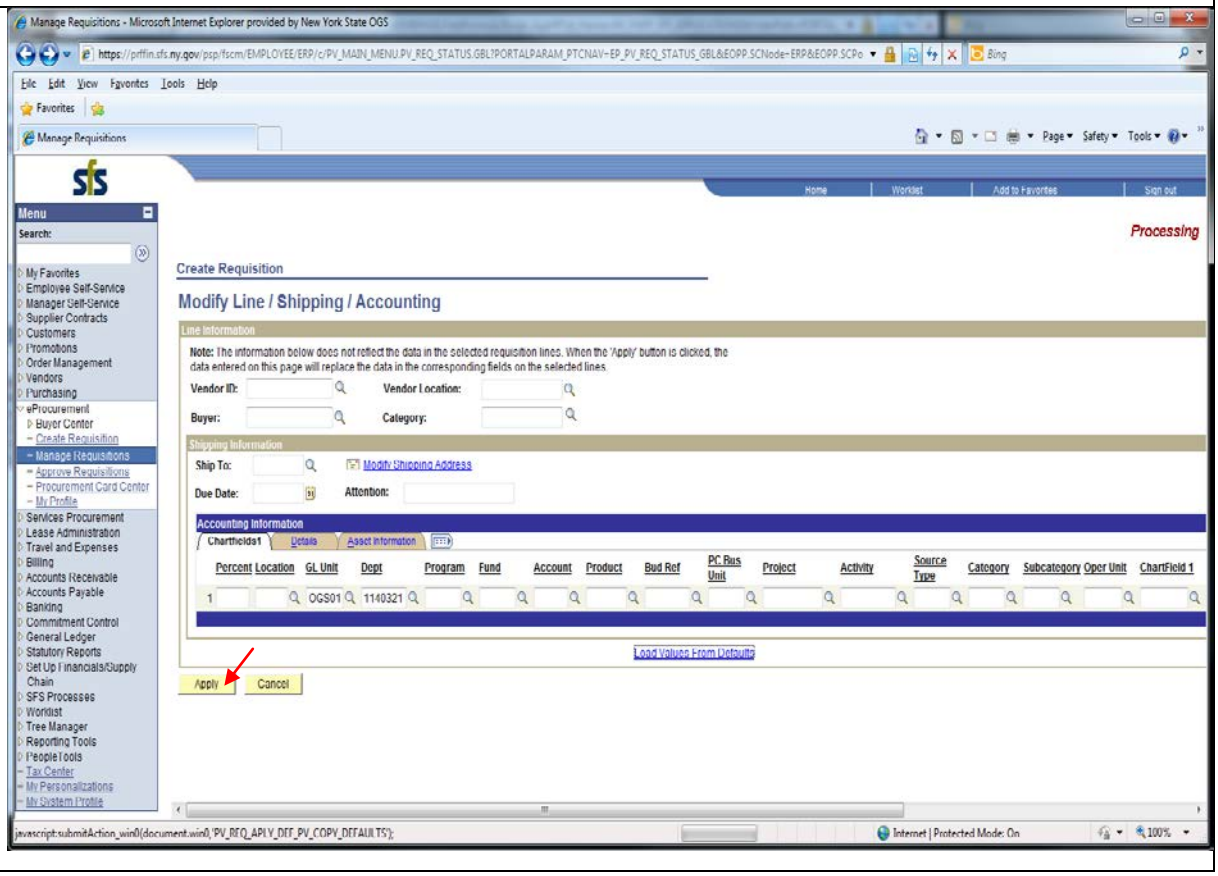


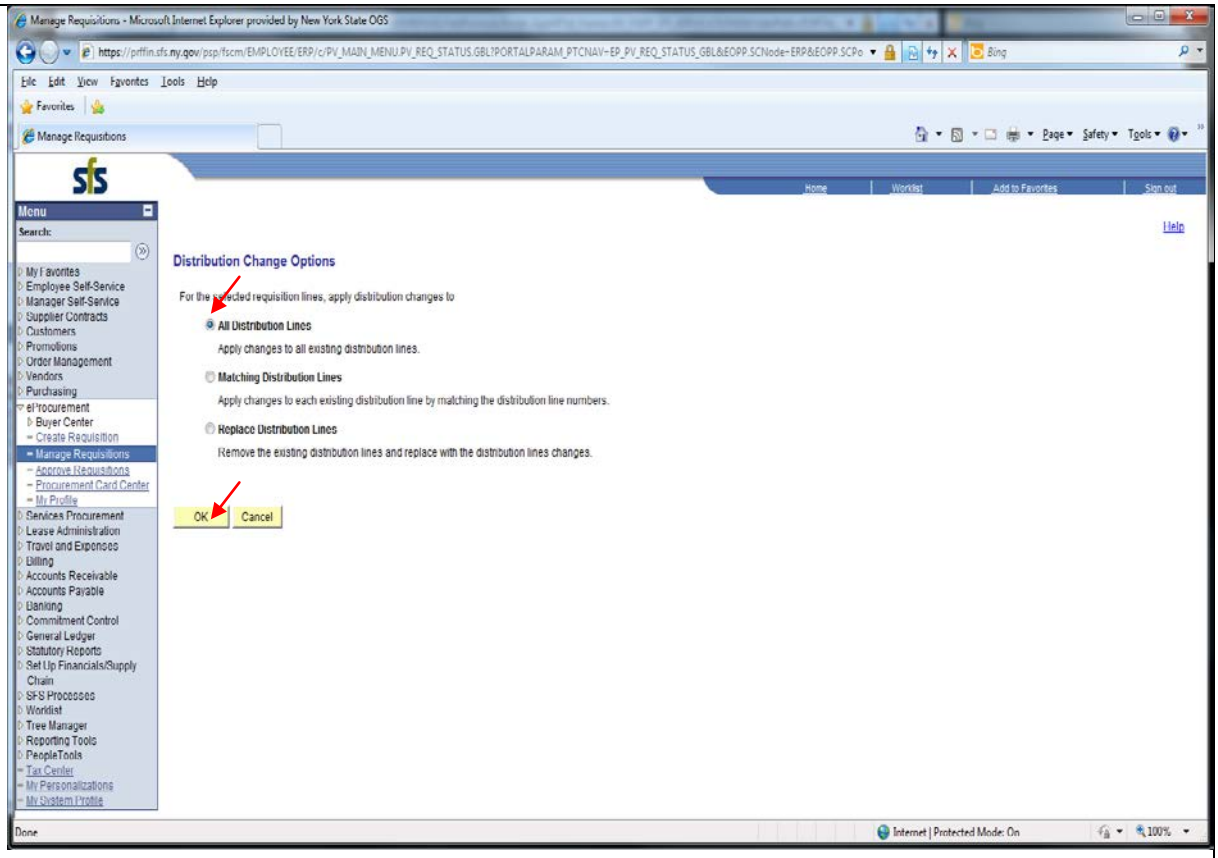
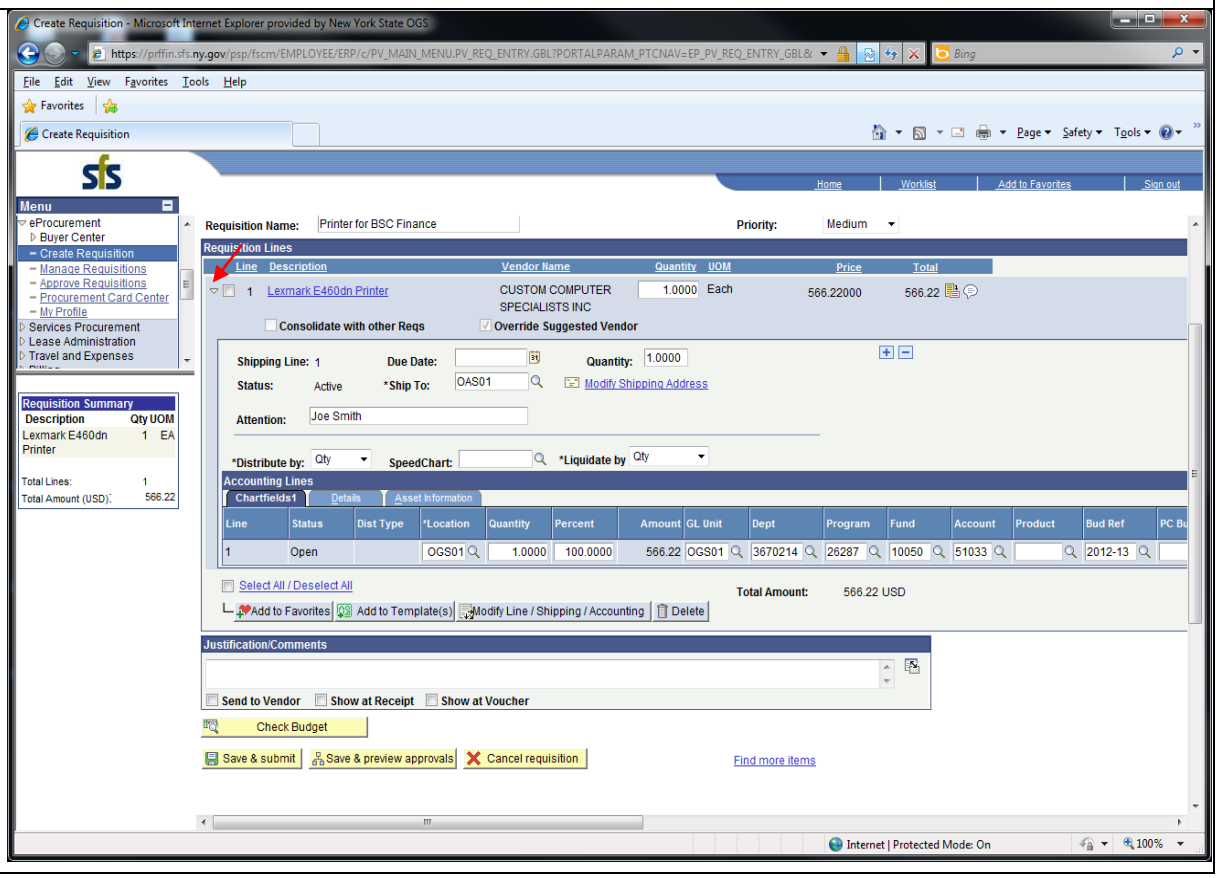
If you wish to make the same change to *all* of the lines, check Select All/Deselect All and click Modify Line/Shipping/ Accounting.



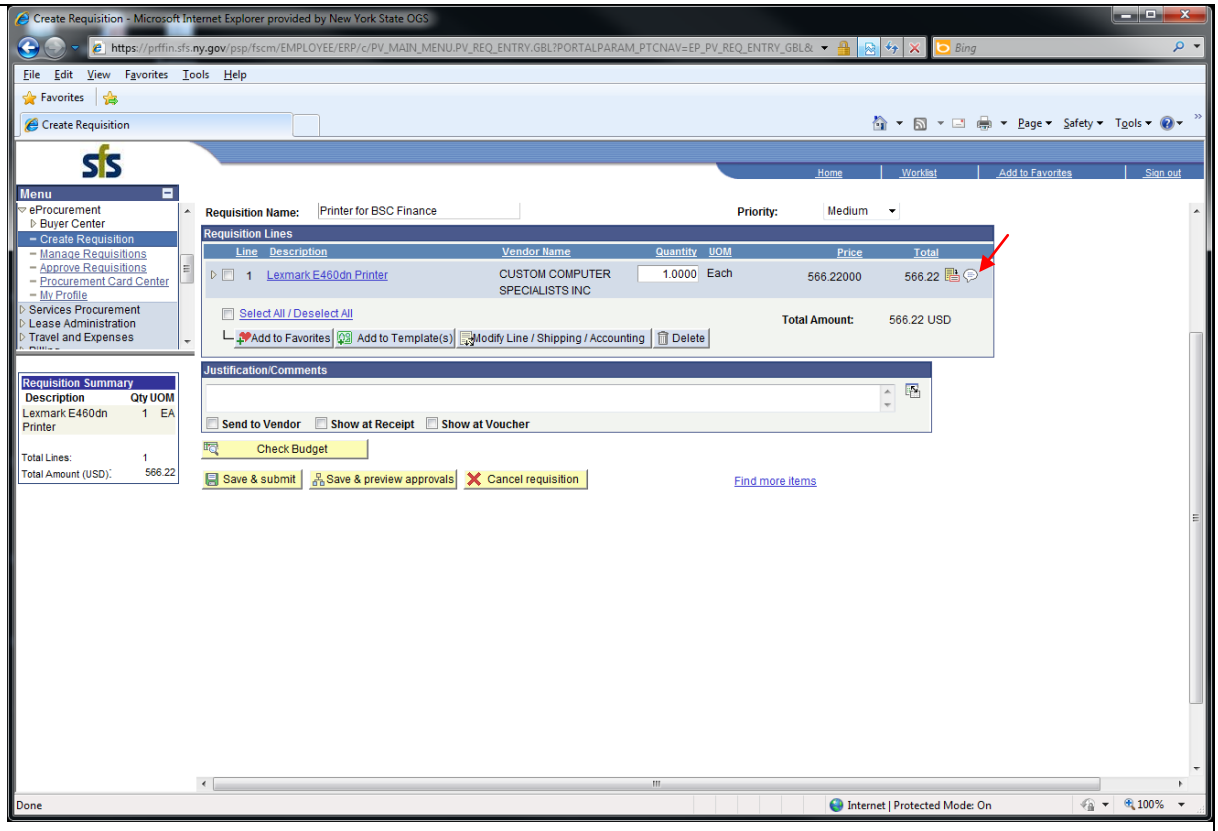
A blank form appears. Enter the information to change that will be used for *all* lines on the requisition.

Click Apply.



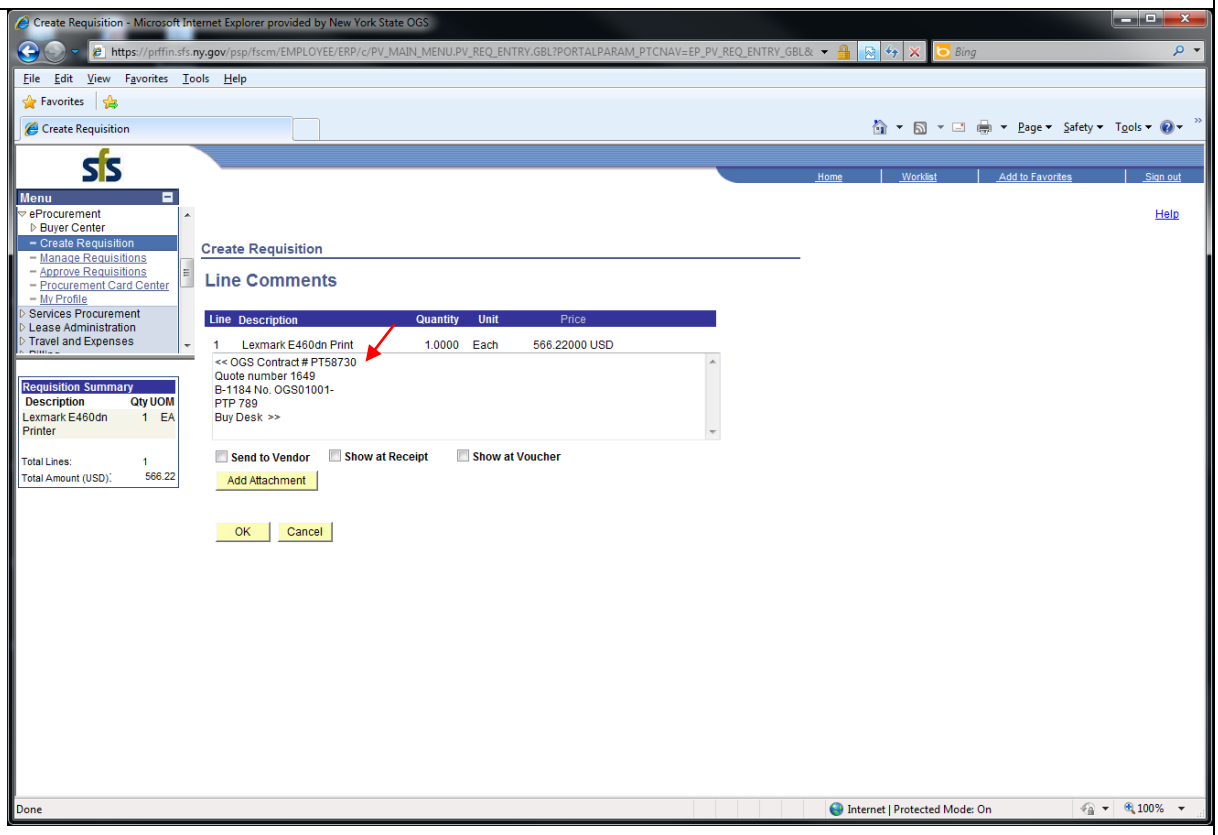
Select the option based on your change. Click OK.	
This section is used to view and modify individual requisition line and distribution details. After clicking the arrow, the individual requisition and distribution detail display. All fields are available to review and/or edit if necessary. Click the arrow to collapse the section when complete.	

The Comments button is used to add line level comments. If the Comments button has dots in it, comments have already been entered for this line item.



Line Comments can be printed on a purchase order to be sent to the vendor or displayed during the receiving or invoicing process.

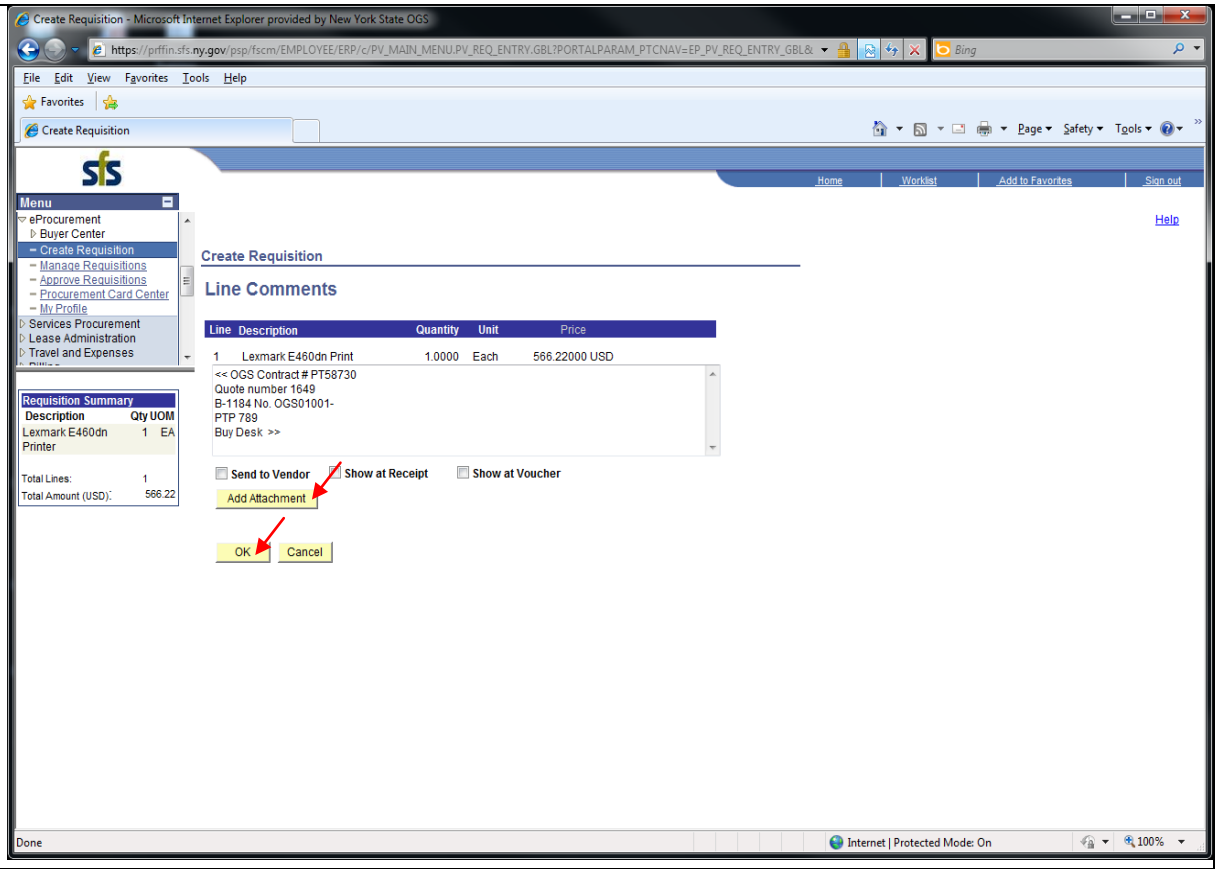
Be sure comments are relevant as the vendor will see them.



NOTE: You can add attachments (i.e. supporting backup including quotes) for your records.

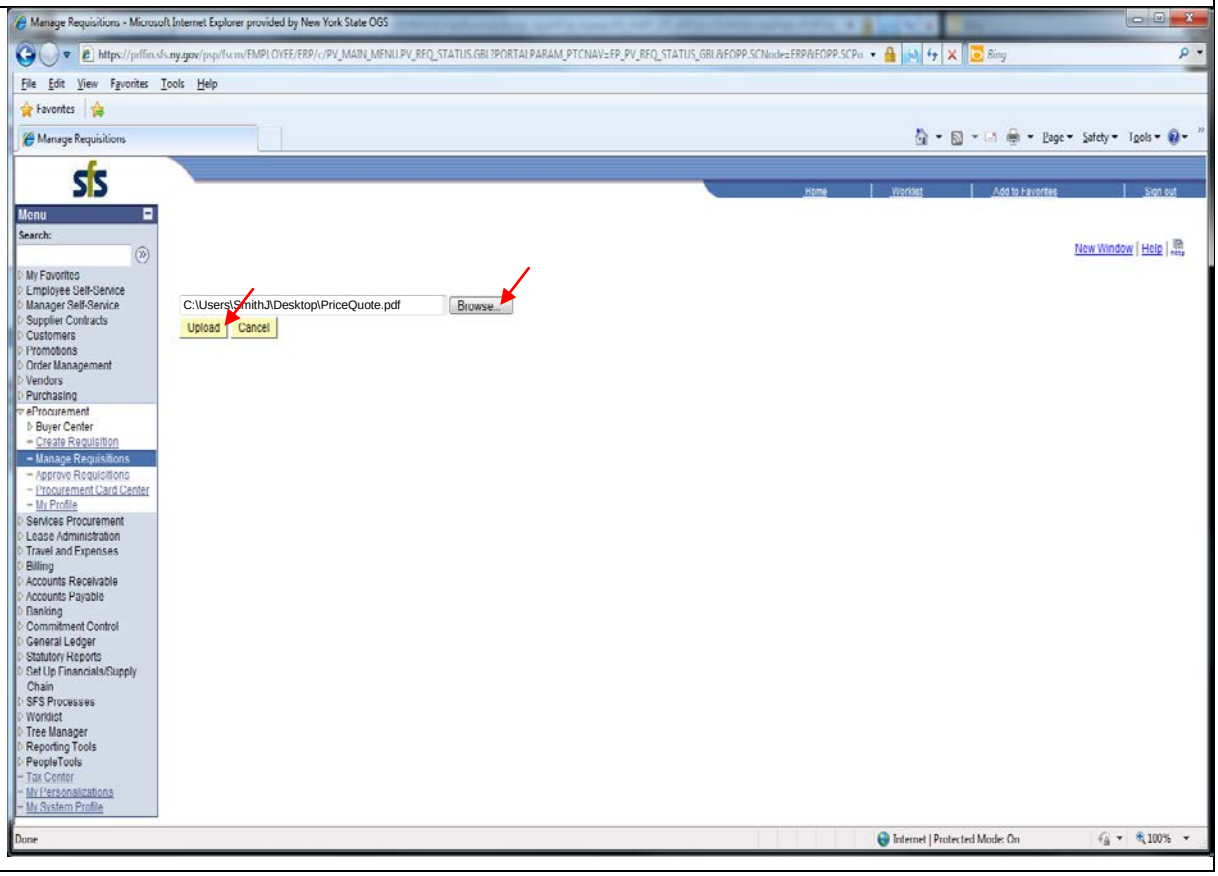
If you are unable to attach, please forward documentation to the BSC at OGSPurchasingUnit@ogs.ny.gov.

Click OK.

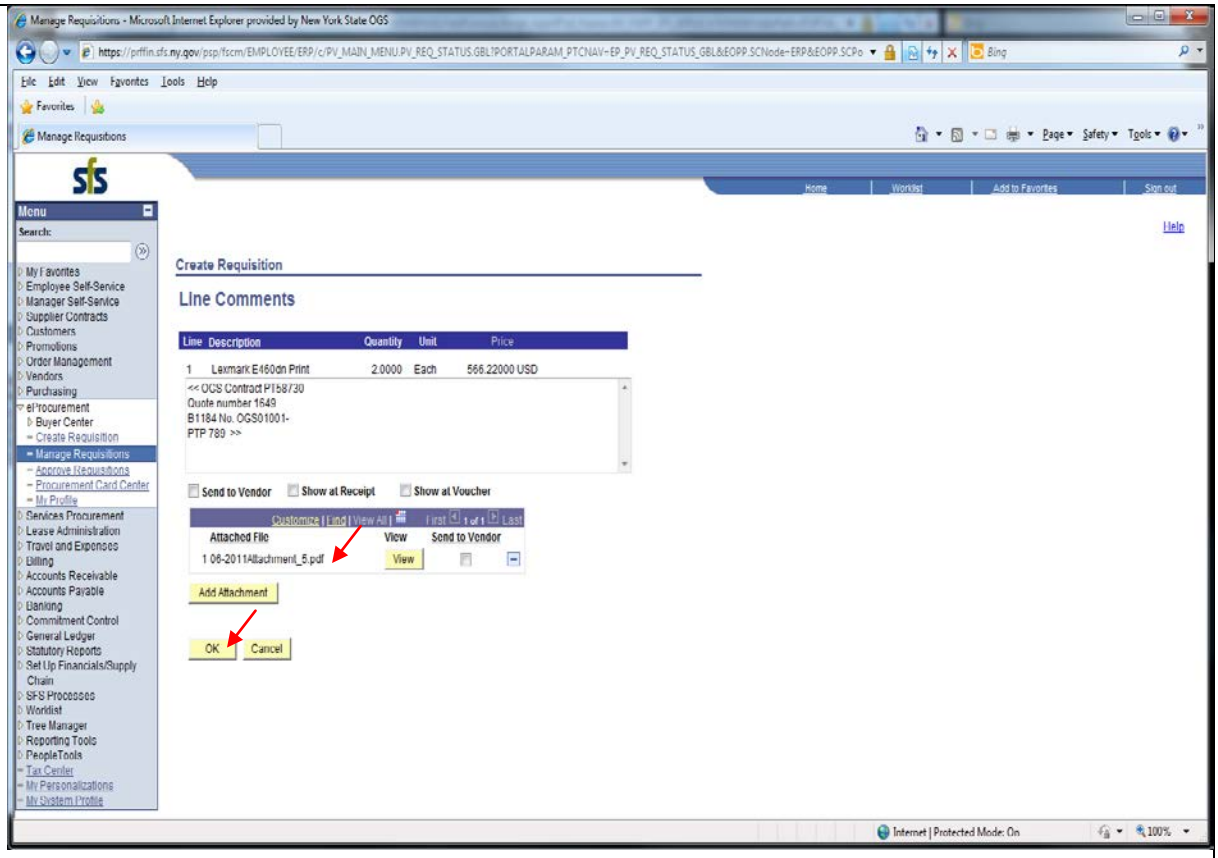


Browse your computer for the documents you wish to attach.

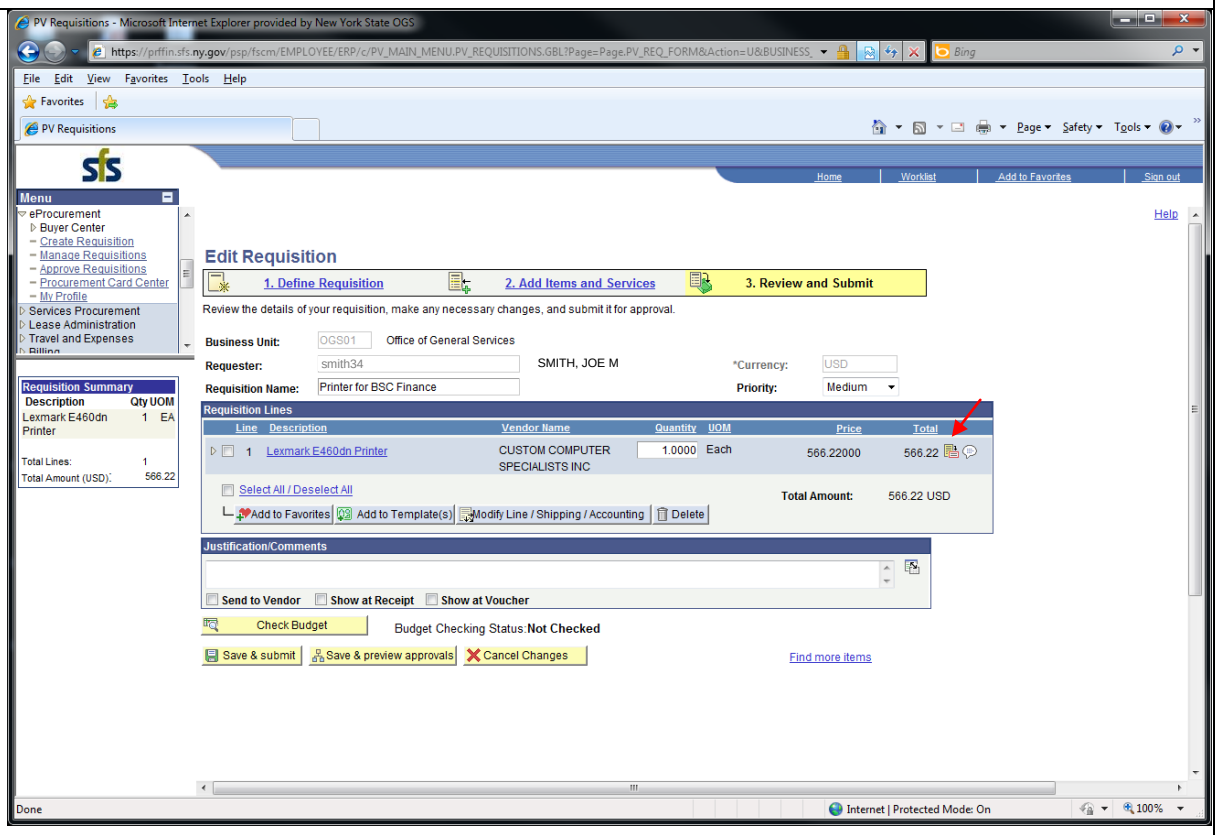
Click Upload.



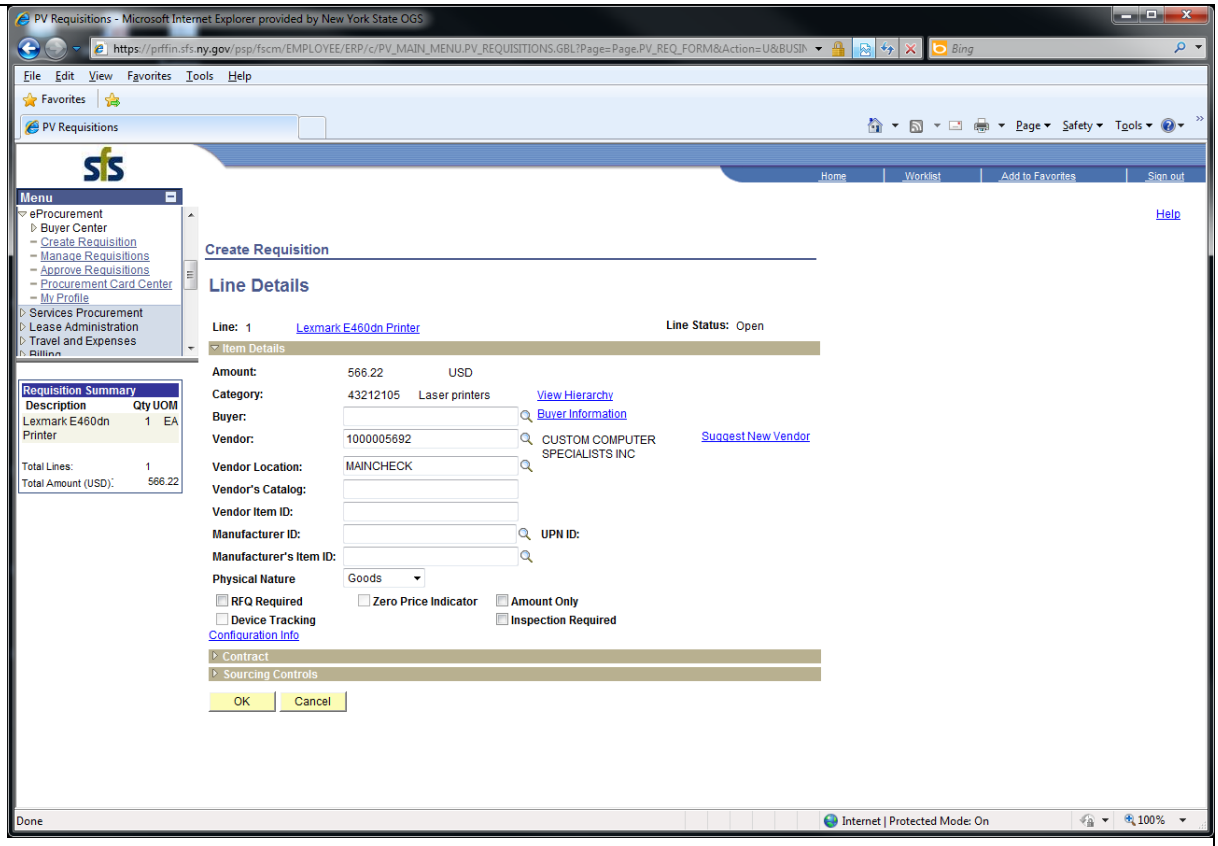
File is now attached. Select OK.



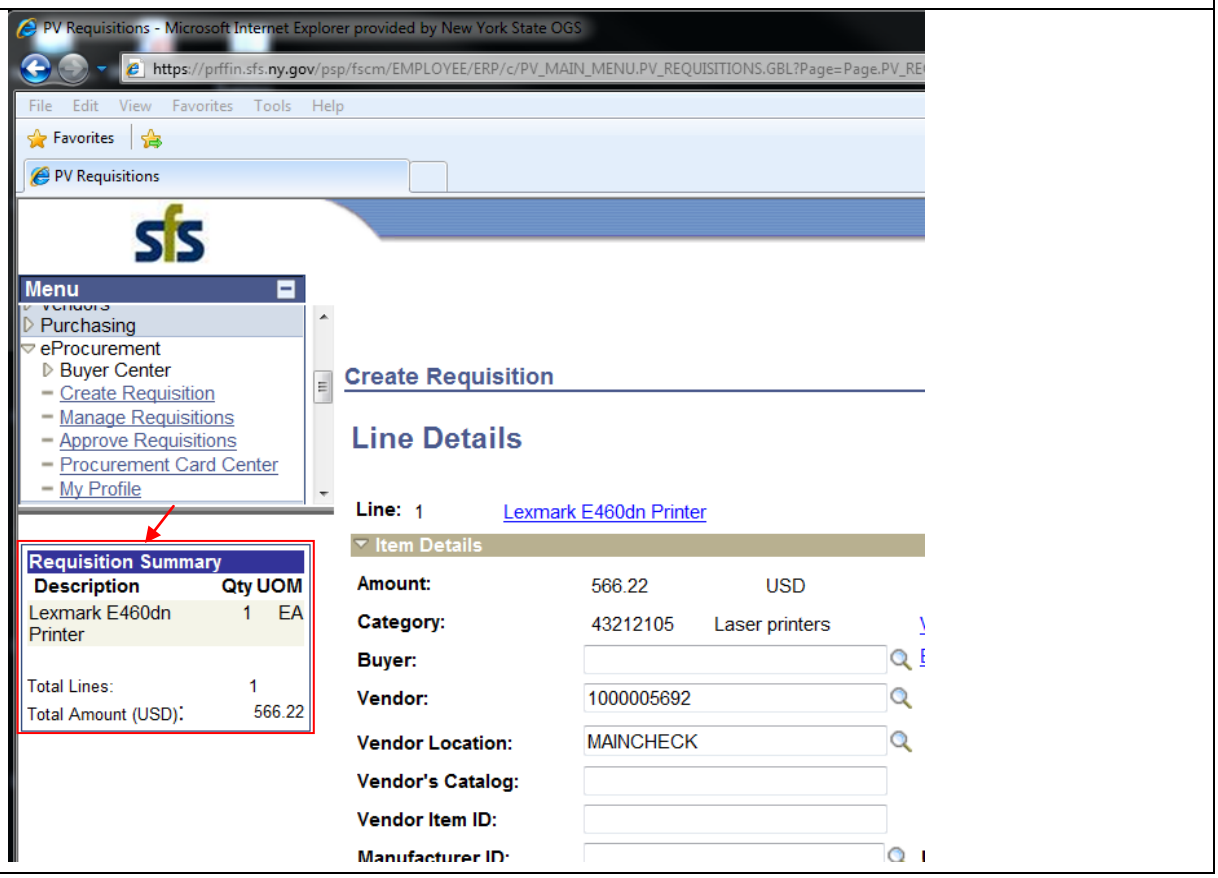
Line Details displays the individual line and distribution details.



Sample of **Line Details**.



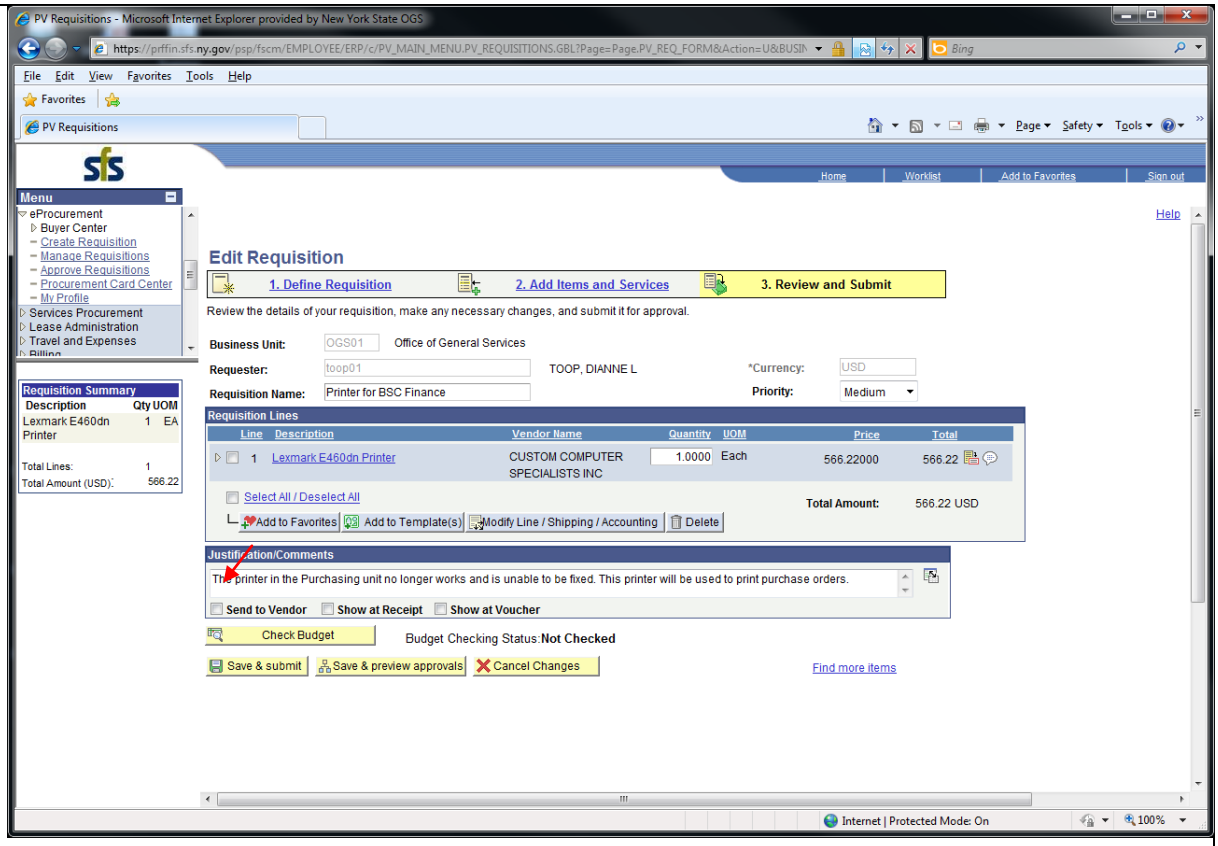
The **Requisition Summary** contains the items, quantity, and total amount. It will give you an overview of the entire requisition.



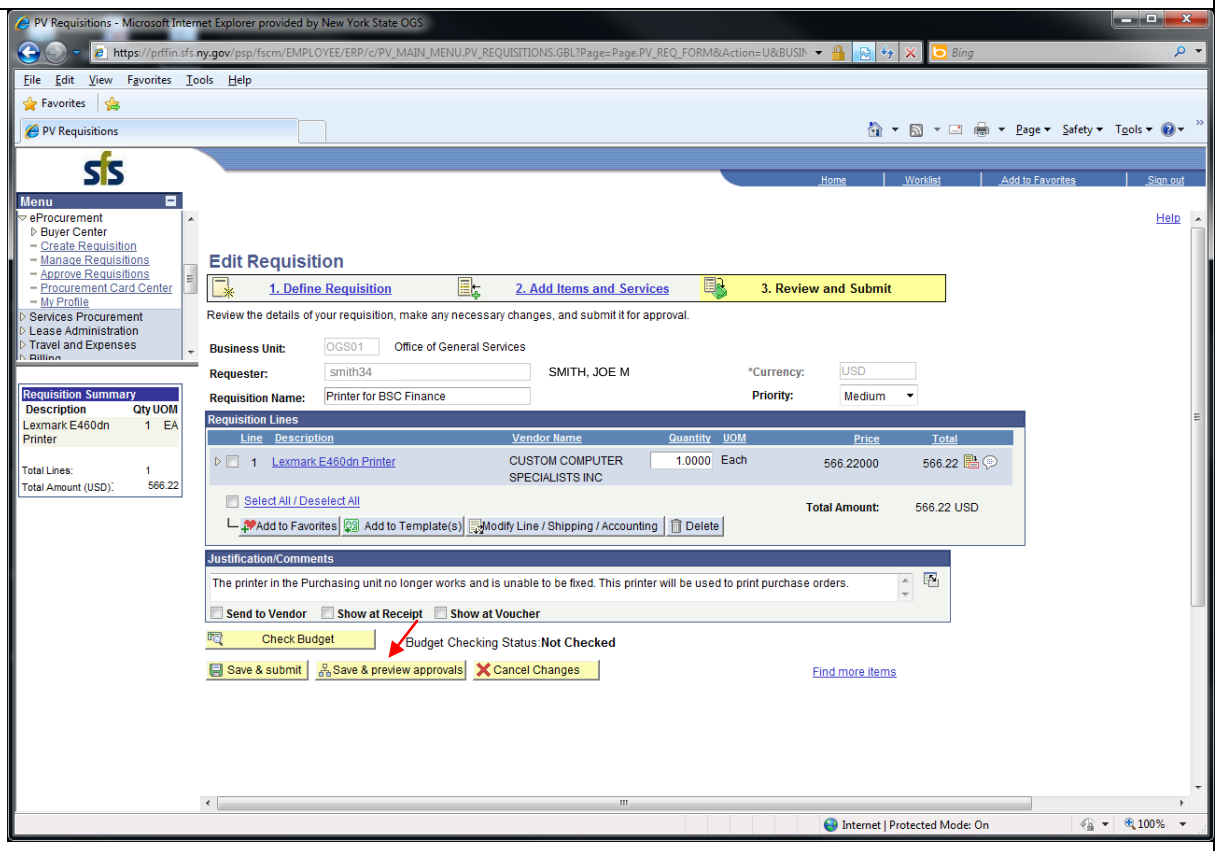
Justification/ Comments

This section is not required by the BSC. Some agencies require the justification for the purchase and it can be entered here.

You do not have to fill this in unless your agency requires it.

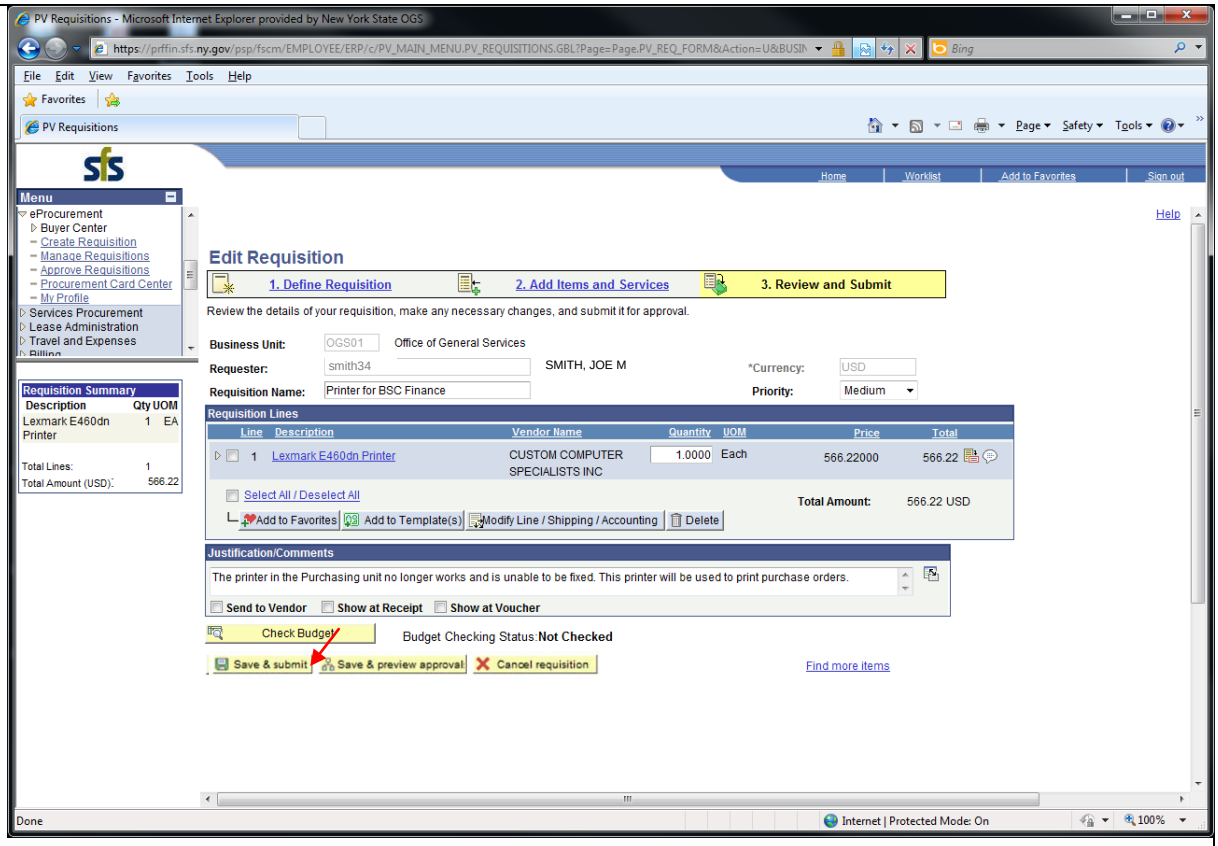


The Save and preview approvals button is used to save the requisition to be continued later or to add an additional (ad hoc) approver to the approval chain.

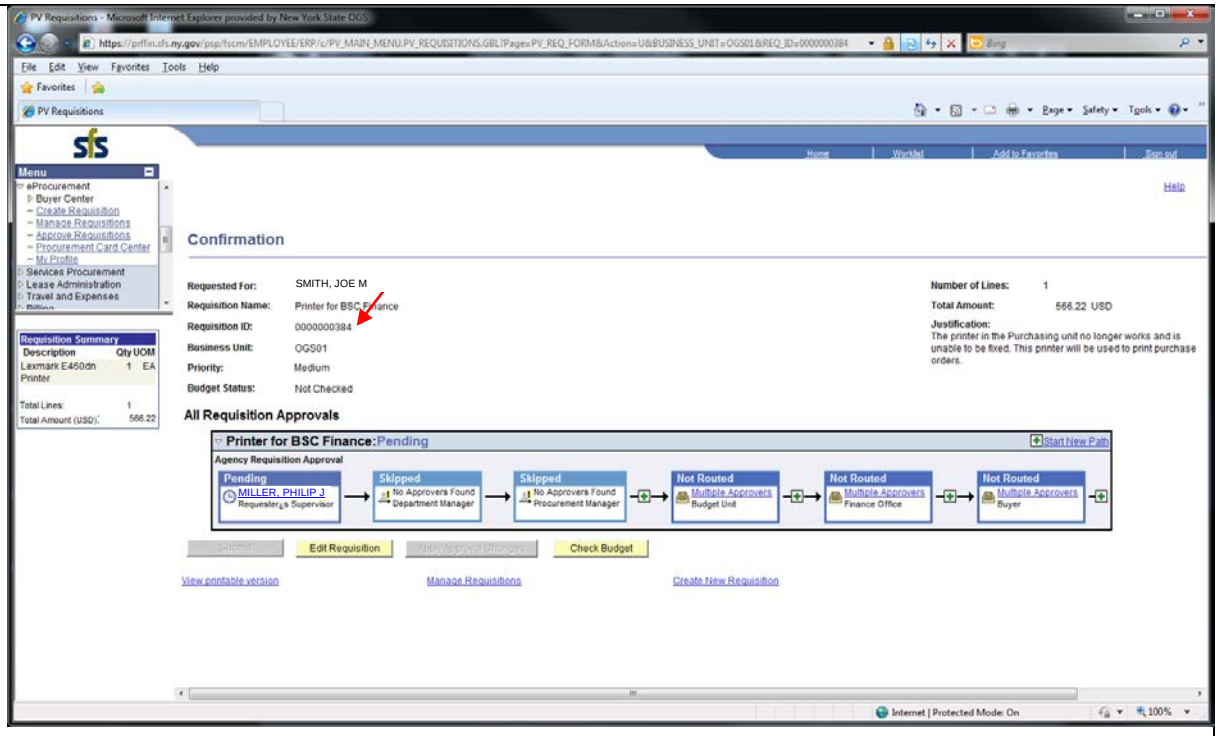


The Cancel requisition button is used to cancel the requisition if you decide to no longer proceed with this requisition.

Click the Save & submit to proceed. This will place the requisition into the work flow.



The **Confirmation** page displays basic information about the requisition and the number of items it contains. The Confirmation page appears upon submitting for processing or saving the requisition for future use. Note the Requisition ID has been assigned (done automatically by SFS). This number will be used for checking the status of the requisition.



You have successfully completed creating a requisition. The purchase requisition is now in the approval process and has been forwarded to your immediate supervisor.