

# My Requisitions tasks

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## Create a requisition

**\*If you have a new vendor,** please email the W9 to [internalaudit@una.edu](mailto:internalaudit@una.edu) to get the L# before you start the requisition.

To begin the purchase process, use the **My Requisitions** dashboard page to create a purchase requisition.

### Procedure

1. On the **My Requisitions** dashboard page, click **Create Requisition**.
  2. On the **Requestor Information** page, specify who is requesting the purchase using the available fields if you are not the default requester for the account. Click **Next** to continue to the next page.
  3. On the **Vendor Information** page, select the vendor for the requisition. Type the name of the vendor or the vendor number if known and search for it. Select the appropriate vendor. If it is a new vendor, send the new vendor W9 to [internalaudit@una.edu](mailto:internalaudit@una.edu) to get L#before starting requisition. Type the vendor email in email field.
  4. On the **Add Item & Accounting** page, add an item using the **Add Item(s)** field. Type the description of the item(s) needed and the page updates with required fields for the selected item. **\*Please note, index does not show as a required field, but it is required. Please always start with your index so it will populate your Fund, Org, and Program codes.**
  5. Click **Save**. The page refreshes with the item you just added listed below the **Add Item(s)** field. You can click any item in the list to view its details.
  6. Repeat steps 4 and 5 as necessary to add additional items to the requisition.
  7. Click **Add Accounting**. Enter your index number in the index field and then skip to the account code. Note: Only use account codes beginning with 7s, i.e. 7005, 7058, etc.  
The page refreshes with the required fields for accounting information.
  8. Click **Save**.  
The Requisition Summary updates.
  9. Click **Save as draft** if you want to return to the requisition before submitting or **Submit Requisition** to send the requisition for approval. Click view as PDF and print and have cost center to sign and send to [purch@una.edu](mailto:purch@una.edu) for processing.
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